Before the
Federal Communications Commission
Washington, D.C. 20554

In the Matter of	)	
	)	
Annual Assessment of the Status of Competition in the Market for the Delivery of Video Programming	))))	MB Docket No. 07-269

REPLY COMMENTS OF VERIZON[1] ON THE STATUS OF COMPETITION IN THE VIDEO MARKETPLACE IN 2009

As the Commission considers the status of video competition in 2009, it should continue to look for opportunities to remove barriers to more widespread and meaningful video competition. Most significantly, the Commission should ensure that competitive providers have access to the must-have regional sports programming (including in HD) because, without it, many consumers will continue to lack any meaningful alternative to incumbents' services. The Commission should reject any proposals for unnecessary new regulations that would make it more difficult or expensive for competitors to enter the market and bring consumers the well-recognized benefits of wireline video competition.

1. In order to encourage competition and give consumers meaningful choice in the video marketplace, the Commission should prohibit incumbent cable operators from denying competitive providers access to "must-have" regional sports programming (including the HD format of that programming). The record here again confirms that

1 The Verizon companies participating in this filing ("Verizon") are the regulated, wholly owned subsidiaries of Verizon Communications Inc.

access to such programming is essential to effective video competition.[2] For example, according to Consumers Union, the Commission should address the issue of program access – including access to regional sports programming – which is essential "to foster a competitive and diverse MVPD market." Consumers Union Comments at 3-4. Likewise, OPASTCO urges the Commission to ensure "that rural MVPDs can obtain 'must-have' programming at reasonable rates and under reasonable terms of conditions[,]" which, according to OPASTCO, "will promote fair and effective competition for video services in rural markets." Comments of the Organization for the Promotion and Advancement of Small Telecommunications Companies, at 16-18. As the mayor of the City of Yonkers correctly noted in connection with Cablevision's refusal to provide Verizon with the HD format of its regional sports programming, Cablevision's actions are "anti-consumer" because they "deny many Cable TV viewers (including thousands here in Yonkers who have chosen Verizon as their Cable TV provider) with access to these HD sports programs."[3]

The Commission repeatedly has concluded that regional sports programming is "must-have" programming that is required for any new entrant to compete effectively against incumbent cable operators and, thus, for consumers to enjoy the benefits of

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2 *See, e.g.*, Comments of Dish Network LLC at 1 ("The most effective means for cable companies to thwart video competition remains limiting access to vertically integrated programming"); Comments of AT&T at 2-3 (noting that "cable incumbents have sought to use their control over regional sports programming to undermine their wireline competitors' ability to offer consumers a viable, competitive alternative").

3 Letter from the Honorable Philip A. Amicone, Mayor, City of Yonkers, to Julius Genachowski, Chairman, FCC (July 29, 2009).

competition.[4] Recent consumer research confirms the Commission's conclusions and underscores the competitive importance of regional sports programming in general and HD regional sports in particular. For example, in a survey of more than 850 pay television subscribers in the New York City and Buffalo designated market areas by Global Marketing Research Services conducted on behalf of Verizon, half of those surveyed (54 percent in New York City and 49 percent in Buffalo) indicate they watch regional sports channels in HD "always" or "usually."[5] And large majorities of subscribers indicate their strong preference to watch regional sports channels in HD (67 percent in New York City, 51 percent in Buffalo). *Id.* These preferences translate into purchasing decisions, as more than half of New York City subscribers (57 percent) and nearly half of Buffalo's subscribers (49 percent) say they are "not likely at all" to consider switching to a provider that did not provide regional sports channels in HD.

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4 *See, e.g.*, *Implementation of the Cable Television Consumer Protection and Competition Act of 1992* Report and Order and Notice of Proposed Rulemaking, 22 FCC Rcd 17791, ¶¶ 37-42 (2007) ("The record reflects that numerous . . .RSNs . . . are cable-affiliated programming networks that are demanded by MVPD subscribers and for which there are no adequate substitutes. We find that access to this non-substitutable programming is necessary for competition in the video distribution market to remain viable.") (internal citation omitted); *Applications for Consent to the Assignment and/or Transfer of Control of Licenses,* Memorandum Opinion and Order, 21 FCC Rcd 8203, ¶ 124 (2006) ("[A]n MVPD's ability to gain access to RSNs and the price and other terms of conditions of access can be important factors in its ability to compete with rivals").

5 *See* Exhibit 1, Declaration of Chris Stella, Exhibit A, at 2.

Moreover, among sports fans – a large and important [6] demographic – the results are even more dramatic: 74 percent of sports fans in New York City and 62 percent of sports fans in Buffalo (as compared to 67 percent and 51 percent in the general population) indicate a "strong preference" to watch regional sports networks in HD, and a full 65 percent of New York City subscribers and over half of Buffalo subscribers (54 percent) (in comparison to 57 percent and 49 percent in the general population) say they are "not likely at all" to consider switching to a provider that did not provide regional sports channels in HD. *Id.* Further, 63 percent of New York City sports fans and 66 percent of Buffalo sports fans (as compared to 59 percent and 58 percent in the general population) state that they are unlikely to switch to a provider offering more channels at the same price, absent regional sports channels in HD. *Id.* at 3. Indeed, 77 percent of sports fans said that the availability of regional sports networks in HD is an important factor in deciding whether to switch away from their current provider. *Id.* at 2.

As the record confirms, an incumbent's withholding of regional sports programming (including the HD format of that programming) essentially relegates consumers who demand such programming to only one option: to subscribe to the incumbent cable operator that provides that regional sports programming. The Commission should not condone such tactics that eliminate meaningful consumer choice.

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[6] Indeed, evidence demonstrates that sports fans are a prime reason for the increasing number of HD television sales in the United States. *See* Second Annual CEA Study Highlights High-Def Sports as Key Driver to HDTV Sales, available at http://digitaltvcenter.com/news/2007/01/09/second-annual-cea-study-hd-sports-drive-hdtv-sales/ (last visited August 24, 2009) (finding that "nearly 50 percent of sports fans purchased a HDTV for the purpose of watching a specific sporting event"); Super Bowl Will Drive More Than 2 Million HDTV Sales, Says CEA, available at http://www.ce.org/Press/CurrentNews/press_release_detail.asp?id=11679 (last visited August 24, 2009).

2. To foster video competition, the Commission also should refrain from adopting rules that are either unnecessary or affirmatively harmful to competition, such as by adopting cable-centric technical standards for navigation devices, as we have discussed in prior comments in this proceeding. TiVo concurs with this approach, endorsing the Commission's efforts to facilitate industry standards that address "both traditional cable and other MVPD systems." Comments of TiVo, Inc. at 12. As TiVo correctly notes, the Alliance for Telecommunications Industry Solutions ("ATIS"), which is an industry standards setting body open to all parts of the industry and to other stakeholders, has been working to create standards for bidirectional navigation devices that work and support consumers' interactivity with an IPTV platform.

On May 22, 2009, the IPTV Interoperability Forum ("IIF") of ATIS published a "Trial-Use Standard" to implement a separable security solution for IPTV (ATIS-0800033). Building on existing CableCARD™ standards, the solution is designed to be compatible with hybrid networks and cable systems. However, because other means may exist to implement a separable security solution for IPTV, the IIF will revisit the standard in July 2010 and decide whether changes are warranted or whether the standard should be adopted, modified, or retracted. In the meantime, developers can utilize the standard in creating IP-based separable security that allows IP-based video and data to be authorized and decrypted by a removable CableCARD™-like device such as VueKey™. The efforts of ATIS and the IIF will encourage the creation of technical approaches that are compatible with video providers regardless of their delivery platform – efforts the

Commission should promote.[7] The Commission should encourage these types of standard-setting processes, open to all interested stakeholders, rather than adopting particular technical standards that may inhibit competition or innovation.

3. Finally, the Commission should continue to recognize that wireline video competition benefits consumers and reject misleading arguments that downplay these benefits. For example, Montgomery County, Maryland questions the benefits of video competition, pointing to standalone cable rates of Verizon and other cable operators that it claims are "very high." Comments of Montgomery County, Maryland, at 2-7. But standalone prices do not take into account the effect of promotions and bundling, both of which effectively reduce the prices paid by consumers for video service.

More than 80 percent of Verizon's video customers purchase FiOS TV as part of a bundle, often at a significant discount or with other benefits, such as "free" equipment. To take but one example, new customers in Montgomery County can purchase a triple play bundle of services -- which includes FiOS Internet access service at download and upload speeds of 15 Mbps and 5 Mbps, respectively; Freedom Essential Voice service; and FiOS TV service – at only $79.99 per month for the first six months ($109.99 thereafter). This bundled promotional price is only $16.70 more than the price of

[7] Although TiVo expresses concern that "Verizon may seek to employ switched/IPTV technology," TiVo Comments at 13, n.30, IPTV is essentially a switched or at least a bi-directional solution and Verizon intends to comply fully with open industry standards for this technology such as those developed in the IIF.

Comcast's "standalone" expanded basic service. *See* Montgomery County Comments at 2.

Montgomery County's price comparisons also compare apples to oranges by ignoring relevant differences between different providers' service offerings. For example, Montgomery County claims that the monthly price of Verizon's "expanded basic" service is $47.99. Montgomery County Comments at 2, Table 1. In actuality, the service for which Verizon charges $47.99 (a monthly rate in place since 2008) is FiOS TV Essentials, an offering that includes more than 218 all digital channels. By contrast, Comcast's and RCN's "expanded basic" service offerings with which Montgomery County seeks to compare Verizon's FiOS TV Essentials consist of 74 and 85 analog channels, respectively. Thus, the comparison drawn by Montgomery County is not meaningful.

Furthermore, increased video competition benefits consumers beyond lower prices. For example, in order to attract customers to its FiOS services, Verizon is offering new local programming options to subscribers in certain markets. Specifically, in June 2009, Verizon launched two new channels – FiOS1 Long Island and FiOS1 New Jersey – which give subscribers on Long Island in New York and subscribers in nine counties in northern New Jersey specialized local content that includes local news and sports, regular traffic and weather reports, and other community programming.[8]

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[8] Press Release, *Verizon Launches FiOS1 Channels on Long Island and in Northern New Jersey; Verizon FiOS Brings Consumers an Exciting, New Source for Hyper-Local Content With News, Sports, Traffic, Weather and So Much More; New Channels Arrive as Verizon Offers Great New Bundles and Promotions, Including Offers for Free Netbook Computers or Camcorders* (June 22, 2009) (available at http://newscenter.verizon.com/press-releases/verizon/2009/verizon-launches-fios1.html).

In addition Verizon continues to provide consumers with access to an expanded range of HD content. Verizon recently added six additional, national HD channels, bringing the total number up to between 118 and 130 (depending on the market).[9] At the same time, Verizon continues to add innovative, interactive features to its video service. Most recently, Verizon added new social-networking widgets that allow customers to access sites such as Facebook and Twitter from their television, and Verizon announced that it plans to create an open development platform for third-party applications that will be available to FiOS TV customers through a Widget Bazaar.[10]

As illustrated by Verizon's efforts to expand local programming options, increase the availability of HD content, and promote third-party applications, video competition benefits consumers in a variety of ways beyond lower prices – benefits that Montgomery County's price comparisons do not take into account. Consumers will realize even greater competitive benefits if the Commission takes the modest steps outlined above and in Verizon's opening comments.

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[9] http://policyblog.verizon.com/PolicyBlog/Blogs/policyblog/EricRabe9/632/VerizonFiOSAddingSixMoreHDChannels.aspx.

[10] Press Release, *Verizon Brings the Web to the TV With Facebook, Twitter and Internet Videos* (July 15, 2009) (available at http://newscenter.verizon.com/press-releases/verizon/2009/verizon-brings-the-web-to-the.html).

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Respectfully submitted,

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Attorneys for Verizon

Before the
FEDERAL COMMUNICATIONS COMMISSION
Washington, D.C.

VERIZON TELEPHONE COMPANIES AND VERIZON SERVICES CORP. Complainants, v. MADISON SQUARE GARDEN, L.P. AND CABLEVISION SYSTEMS CORP., Defendants.	File No. CSR-8185-P

DECLARATION OF CHRIS STELLA

1. My name is Chris Stella. My business address is **712 East New Haven Ave. Melbourne, FL 32901**. I am a employed as a Senior Project Manager for Global Marketing Research Services (GMRS). In this capacity, I am responsible for public opinion research, sample design, and telephone surveys conducted by GMRS on issues of public opinion. I have worked for GMRS in this capacity for more than 10 years, and am qualified to perform these tasks.

2. GMRS is a survey research and political consulting firm based in Melbourne, Florida, with an additional office in Decatur, Georgia. GMRS has conducted thousands of market research projects by phone, internet, and person to person, over the past 23 years. GMRS is an accredited member of the American Association of Public Opinion Research (AAPOR) and the Marketing Research Association (MRA).

3. GMRS was retained to conduct surveys on behalf of Verizon concerning the views of pay television service subscribers in the New York City and Buffalo designated market areas (DMAs) related to the significance of regional sports programming and high definition programming.

4. GMRS conducted two telephone surveys of adult subscribers to paid video programming service (e.g., cable, satellite) in the New York City and Buffalo DMAs between July 28th and August 4th, 2009. Each survey was conducted using Random Digit Dialing, which ensures that all possible subscribers had an equal opportunity to be called to complete the survey, thus ensuring a representative and unbiased survey. The sample for each survey was drawn randomly from within each DMA, defined by county. Minor weighting was applied to the results where necessary to make sure they are representative for each DMA.

5. In the New York City DMA, a total of 851 interviews were conducted, and in Buffalo a total of 658 interviews were conducted. Based on these sample sizes, the survey data have a margin of error of +/-3.4% for the NY DMA sample and +/-3.8% for the Buffalo DMA sample at a confidence interval of 95%. Put another way, this means that the results of our NYC data, for example, are accurate within 3.4 percentage points 95 times out of 100. The margin of error will be higher for sub-groups.

6. The methods and procedures employed by GMRS in conducting these surveys are consistent with the market survey guidelines and standards established by AAPOR and the MRA.

7. Attached hereto as Exhibit A are the results of the surveys conducted by GMRS as well as an overview of those results.

I declare, under penalty of perjury, that the foregoing is true and correct.

Chris Stella

August 13, 2009

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Global Marketing Research Services Survey of Paid Television Subscribers in NY and Buffalo Designated Market Areas

August 7, 2009

Overview

Global Marketing Research Services (GMRS), on behalf of Verizon, conducted two surveys among paid TV subscribers (henceforth "subscribers") in the New York City and Buffalo Designated Market Areas (DMAs) in order to get a better view of the value subscribers placed on regional sports programming, high definition programming, and the ability to watch games of the teams they follow in high definition broadcast. The following is a brief overview of the results of these surveys:

1) Subscribers place a high degree of importance on the availability of both regional sports programming and high definition programming.
2) "Sports fans[1];" those who follow a professional sports team and place a strong degree of importance on being able to view games on TV of the teams they follow, are even more likely to value regional sports programming and high definition programming, particularly for their regional sports channels.
3) Roughly three in four subscribers – and an even greater percentage of sports fans – suggest it is unlikely they would consider switching to a "new provider that did not provide sports channels in HD." Fewer than one in five indicated they would even consider switching to a provider that didn't offer HD regional sports programming.
4) MSG and MSG Plus watchers are even more strongly opposed to considering any kind of switch to a provider without those channels in HD – particularly MSG Plus watchers.
5) Regardless of whether they currently have access to regional sports channels, both subscribers and sports fans – by an overwhelming majority in both cases – suggest an intense unlikelihood of switching to a provider that doesn't offer regional sports programming in HD, *even if the provider offers more channels at the same price.*

[1] "Sports fans" are defined for present purposes as those subscribers who indicated in Q. 5 that they considered themselves a fan of professional sports, and additionally indicated in Q. 6 that it was either "very" or "somewhat" important to be able to watch a game on TV being played by a team they closely followed.

Findings

In the two geographic markets surveyed, data shows that the majority of subscribers are sports fans who enjoy watching game broadcasts on regional sports programming channels. In the New York City DMA, three in five subscribers (62%) have access to regional sports programming in their home; in Buffalo, that percentage is slightly lower, at 53%.

Regardless of home access to regional sports programming, the ability to watch programming on regional sports channels is important to subscribers in both markets, with 72% of NYC DMA subscribers and 71% of Buffalo subscribers indicating they personally watch an regional sports channels at least a few times a year; 39% of NYC subscribers and 32% of Buffalo subscribers watch a regional sports channel at least several times a week.

The ability to watch regional sports programming <u>in HD</u> is also very important; half of subscribers (54% in NYC, 49% in Buffalo) indicate they watch regional sports channels in HD "always" or "usually." And <u>large</u> majorities of subscribers indicate their strong preference to watch regional sports in HD (67% in NY, 74% among NYC sports fans; 51% in Buffalo, 62% among Buffalo sports fans).

There is one noteworthy instance of differentiation between subscribers in general and sports fans in particular: when asked specifically about the importance of regional sports channels in HD when considering a potential switch away from their current provider, while majorities among subscribers in New York and Buffalo (54%) indicate this would be an important consideration in deciding whether or not to switch, among sports fans this percentage was considerably higher. More than three of four sports fans in both markets (77% in both) indicate this is an important factor in their decision of whether to switch away from their current provider.

Given the high level of importance subscribers in these two markets ascribe to regional sports channels in HD, it should come as little surprise that three-quarters of New York City DMA subscribers and more than four in five Buffalo subscribers indicate they would be unlikely to switch to a provider that did not offer regional sports in HD. What is even more remarkable is the level of intensity behind these feelings. More than half of NYC subscribers (57%) and half of Buffalo subscribers (49%) say they are "not likely at all" to consider switching to a provider that did not provide sports channels in HD. This level of intensity is even higher among sports fans (65% in NY, 54% in Buffalo), particularly those who currently receive MSG and MSG Plus. <u>When asked directly if they would consider switching to a provider that did not offer MSG and MSG Plus in HD, 71% of NYC subscribers and 76% of Buffalo subscribers indicated they weren't likely to switch, more than half "not likely at all."</u>

Finally, concerning the likelihood that a subscriber would switch to a provider lacking regional sports channels in HD, the surveys asked:

> "Regardless of whether you currently have access to regional sports channels at home, let's say for a moment you are a paid TV service subscriber with regional sports channels in high definition. If another provider were to offer you more channels at the same price, but without HD regional sports channels, how likely would you be to switch to the provider offering more channels but no HD sports channels?"

After hearing this statement, 59% of NYC subscribers and 58% of Buffalo subscribers say they are unlikely to switch to the provider offering more channels at the same price, *absent HD regional sports programming*. For sports fans, the unlikelihood is even higher (63% for NYC sports fans, 66% among Buffalo sports fans).

<u>Conclusions</u>

In the New York City and Buffalo DMAs, subscribers in general, and sports fans in particular, show a clear preference for regional sports channels in high definition.

They also show a clear preference for providers who offer these regional sports channels in high definition, and a company that is unable to provide similar content is going to have a more difficult time attracting these consumers. Data in these two surveys show that there is a direct link between competitiveness and the ability to offer high definition regional sports programming. The surveys also show this to be true specifically in the case of MSG and MSG Plus – with a large majority of subscribers indicating a lack of willingness to switch to a provider that lacks these channels in high definition.

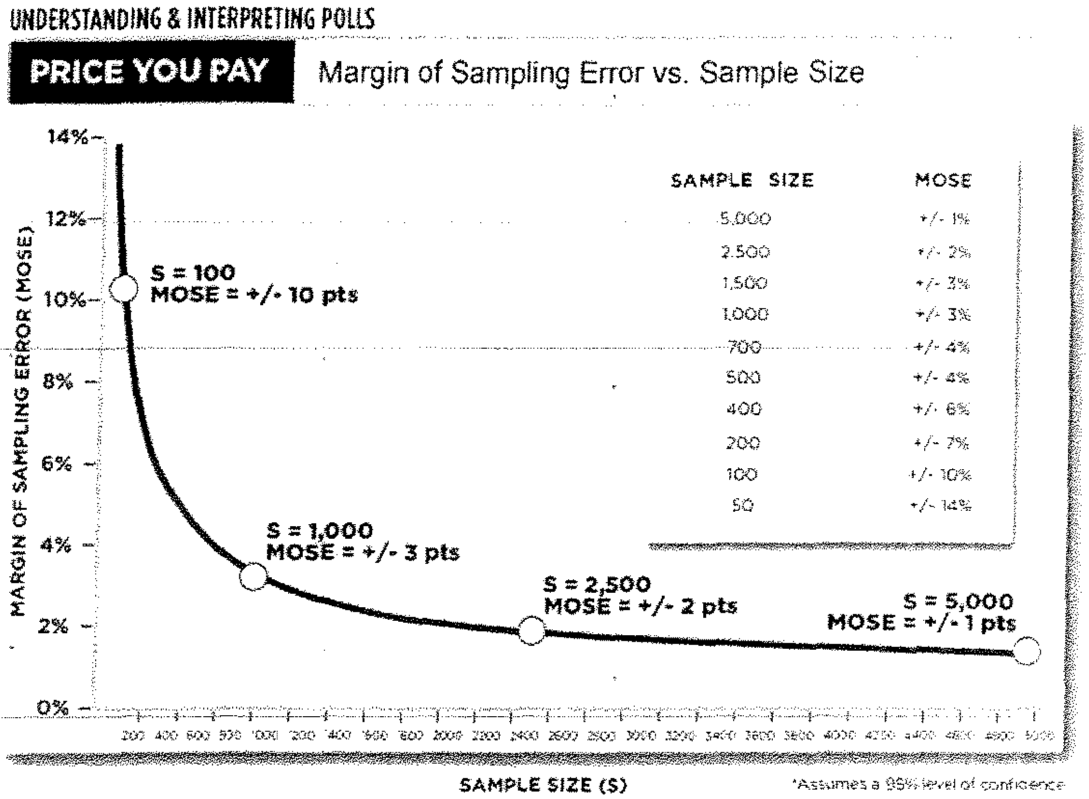
Methodology

Global Market Research Services (G.M.R.S.), on behalf of Verizon Communications, conducted two telephone surveys of adult, paid television service subscribers in the New York City and Buffalo DMAs between July 28th and August 4th, 2009. Each of the surveys was conducted using Random Digit Dialing, which ensures that all possible subscribers had an equal opportunity to be called to complete the survey, thus ensuring a representative survey. The sample for each survey was drawn randomly from within each DMA, defined by county. Minor weighting was applied to the results where necessary to make sure they are representative for each DMA.

In the New York City DMA, a total of 851 interviews were conducted, and in Buffalo a total of 658 interviews were conducted. Based on a sample of these sizes, the survey data have a margin of error of +/-3.4% for the NY DMA sample and +/-3.8% for the Buffalo DMA sample at a confidence interval of 95%. Put another way, this means that the results of our NYC data, for example, are accurate within 3.4 points 95 times out of 100. The margin of error will be higher for sub-groups.

According to the American Association of Public Opinion Research (AAPOR):

> "Publicly released polls almost always (and should always) have a margin of sampling error (MOSE) specified in any report of the results. That is the + or – 3 percentage points, or + or – 2 percentage points you generally see at the end of a method statement. (We often talk about a MOSE as if it applies to the whole survey, but note that in reality it applies to each answer in the survey as you see in all the examples.)
>
> Basically, the margin of sampling error is the price you pay for not talking to everyone in your population group. The MOSE describes the range that the answer likely falls between if we had talked to everyone instead of just a sample. For example, for a telephone sample of 1000 randomly selected adults nationwide, the finding from the poll will be within plus or minus 3 percentage points of the answer we would have gotten had we talked to all 210 million adults. So if one of the findings of the poll was that 58% approved of the job their Governor was doing, we would know that the true value would lie somewhere between 55% and 61% if we had talk to the whole population in the state.
>
> To be technically correct, we really only have some degree of confidence around the MOSE we calculate for probability-based samples. Generally, pollsters calculate the MOSE using a 95%confidence level. That is, in 95 times out of a 100, we expect the answer we get from the survey is reflective of the true answer within the MOSE."



[2]

G.M.R.S. is a survey research and political consulting firm based in Melbourne, Florida, with an additional office in Decatur, Georgia. G.M.R.S. has conducted thousands of market research projects by phone, internet, and person to person, over the past 23 years. G.M.R.S. is an accredited member of the American Association of Public Opinion Research and the Marketing Research Association. The Senior Project Manager for these studies was Mr. Chris Stella. Mr. Stella has worked at G.M.R.S. for more than 10 years, and is an expert in the field of public opinion research, sample design, and telephone survey methodology.

[2] http://www.aapor.org/marginofsamplingerror

Verizon FiOS - New York and Buffalo DMA Paid TV Telephone Survey
Topline Report
NY DMA: 7/28/09-8/2/09, 851 Interviews, Margin of Error = ±3.4%
Buffalo DMA: 7/30/09-8/4/09, 658 Interviews, Margin of Error = ±3.8%

***indicates less than 1%**
Note: percentages may not add up to 100% due to rounding

Screeners

S1. Are you, or is anyone in your household, employed in market or public opinion research, advertising, public relations, marketing, on a political campaign or in the media?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
No	100%	100%	100%	100%

S2. Are you, or is anyone in your household, employed by a cable or satellite TV company, a local, long distance, or wireless telephone company, or with any organization related to the telecommunications industry?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
No	100%	100%	100%	100%

S3. Are you responsible for or do you share responsibility for making decisions about such household issues as which telephone, cable, or internet provider you use?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
No	100%	100%	100%	100%

Technology Usage

1. Does your household currently have a subscription to a paid TV service, such as cable or satellite?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
No	100%	100%	100%	100%

2. Who is your current paid TV service provider? (READ LIST)

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Cablevision	35%	n/a	37%	n/a
Time Warner	23%	49%	22%	52%
Verizon (or FIOS)	12%	6%	13%	8%
Comcast	10%	2%	10%	2%
Direct TV	10%	25%	8%	25%
Dish	2%	15%	1%	13%
AT&T	*	n/a	*	n/a
RCN	2%	*	3%	*
Other (SPECIFY, DO NOT READ)	5%	4%	5%	2%
Don't Know/Refused	-	-	-	-

3. Do you own a high definition television; that is, you can watch high definition channels on it?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Yes	67%	57%	73%	64%
No	32%	42%	27%	34%
Don't know/Refused	1%	1%	*	2%

4. And regardless of whether you own an HD-compatible TV, do you currently have access to HD channels in your home, through either your cable or Satellite TV provider?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Yes	84%	71%	90%	73%
No	12%	23%	9%	23%
Don't know/Refused	4%	6%	2%	5%

5. Would you consider yourself a fan of professional sports? Please consider such sports as football, hockey, basketball, baseball, and so on. (IF YES): For which professional sports teams are you a fan? (PRECODED OPEN-END, ACCEPT MULTIPLE RESPONSES)

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
New York Yankees	27%	15%	46%	27%
New York Giants	21%	3%	39%	6%
New York Mets	16%	5%	27%	10%
New York Knicks	10%	2%	17%	3%
New York Jets	9%	2%	17%	4%
New York Rangers	5%	1%	9%	2%
New York Nets	3%	-	5%	-
New York Islanders	2%	1%	5%	1%
New Jersey Devils	2%	*	4%	1%
New York Red Bulls	1%	1%	3%	3%
New York Liberty	1%	*	2%	1%
Buffalo Sabres	*	23%	*	44%
Buffalo Bills	n/a	40%		73%
Other	12%	15%	20%	9%
Not a sports fan	39%	33%	-	-
Don't know/Refused	2%	3%	-	-

6. If you were aware of a game being played on TV by a team you closely follow, how important is it to you to be able to watch that game? Is it...

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	29%	31%	53%	53%
Somewhat important	29%	35%	47%	47%
Not very important	14%	13%	-	-
Not important at all	25%	19%	-	-
Don't know/Refused	4%	2%	-	-
Important (NET)	58%	66%	100%	100%
Not important (NET)	38%	32%	-	-

7. Do you currently have access to any of the following regional sports channels in your home? (READ AND ROTATE LIST, ACCEPT MULTIPLE RESPONSES)

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Yes Network	42%	35%	56%	48%
MSG	38%	41%	55%	60%
SportsNet New York	20%	16%	29%	25%
MSG Plus	17%	11%	24%	16%
None	23%	31%	12%	21%
Other	2%	4%	3%	2%
Don't know/Refused	15%	16%	5%	7%

8. How often would you say you personally watch a regional sports channel? Would you say...

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
More than once a day	8%	6%	15%	9%
Once a day	12%	7%	22%	11%
Several times a week	19%	19%	31%	30%
Several times a month	14%	16%	17%	25%
Just a few times a year	19%	23%	12%	17%
Never	27%	27%	3%	7%
Don't know/Refused	1%	2%	1%	1%

9. And when you do watch a regional sports channel, how often would you say you watch it in HD? Would you say...

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Always	42%	37%	50%	39%
Usually	12%	12%	12%	14%
Sometimes	11%	8%	10%	9%
Rarely	7%	5%	5%	3%
Never	24%	34%	19%	31%
Don't know/Refused	4%	3%	4%	4%
Often (NET)	**54%**	**49%**	**62%**	53%
Not often (NET)	**31%**	**47%**	**24%**	43%

10. Given a choice, is your preference to watch programming on a regional sports channel in HD or in standard? (IF CHOICE): Would that be strongly or somewhat?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Strongly prefer HD	49%	41%	59%	52%
Somewhat prefer HD	18%	10%	14%	9%
Somewhat prefer standard	6%	9%	3%	7%
Strongly prefer standard	7%	7%	7%	7%
Have no preference	18%	28%	15%	22%
Don't know/Refused	3%	6%	2%	3%
HD (NET)	**67%**	**51%**	**74%**	62%
Standard (NET)	**13%**	15%	**10%**	14%

11. How likely would you be to consider switching to a new provider that did not provide sports channels in HD?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very likely	6%	5%	5%	6%
Somewhat likely	7%	11%	7%	12%
Not very likely	17%	21%	17%	20%
Not likely at all	57%	49%	65%	54%
Depends	6%	8%	4%	6%
Don't know/Refused	8%	7%	3%	3%
Likely (NET)	**13%**	16%	**11%**	18%
Not Likely (NET)	**74%**	69%	**82%**	74%

MSG OR MSG PLUS SUBSCRIBERS ONLY

12. And how likely would you be to consider switching to a provider that did not have MSG or MSG Plus, the regional sports channels that cover the Knicks, Devils, Rangers, and Islanders in HD?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very likely	5%	4%	5%	3%
Somewhat likely	13%	14%	14%	15%
Not very likely	15%	15%	14%	16%
Not likely at all	56%	61%	58%	64%
Depends	4%	1%	4%	1%
Don't know/Refused	7%	5%	6%	1%
Likely (NET)	18%	18%	19%	19%
Not Likely (NET)	71%	76%	72%	79%

ASK ALL

13. Generally speaking, how satisfied are you with your current paid TV service provider - such as cable or satellite?

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	48%	50%	47%	52%
Somewhat satisfied	37%	41%	38%	42%
Somewhat dissatisfied	8%	5%	10%	2%
Very dissatisfied	4%	4%	4%	3%
Don't know/Refused	2%	*	1%	*
Satisfied (NET)	86%	91%	85%	94%
Dissatisfied (NET)	12%	9%	14%	5%

For each of the following categories, how satisfied are you with what your current paid TV service provider offers? First...

14. Availability of regional sports channels

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	35%	37%	48%	48%
Somewhat satisfied	33%	35%	40%	41%
Somewhat dissatisfied	3%	3%	4%	5%
Very dissatisfied	3%	2%	2%	1%
Don't know/Refused	26%	24%	6%	6%
Satisfied (NET)	68%	71%	88%	89%
Dissatisfied (NET)	6%	5%	6%	6%

15. Availability of movie channels

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	46%	41%	47%	39%
Somewhat satisfied	36%	38%	38%	41%
Somewhat dissatisfied	7%	5%	6%	7%
Very dissatisfied	3%	4%	2%	2%
Don't know/Refused	9%	12%	7%	12%
Satisfied (NET)	82%	79%	85%	80%
Dissatisfied (NET)	9%	8%	8%	8%

16. Availability of regional sports channels in high definition

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	31%	27%	43%	38%
Somewhat satisfied	28%	33%	34%	39%
Somewhat dissatisfied	2%	2%	3%	1%
Very dissatisfied	3%	2%	3%	1%
Don't know/Refused	36%	36%	18%	21%
Satisfied (NET)	59%	60%	77%	77%
Dissatisfied (NET)	5%	4%	6%	2%

17. Availability of movie channels in high definition

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	40%	31%	44%	36%
Somewhat satisfied	34%	31%	34%	28%
Somewhat dissatisfied	4%	3%	4%	5%
Very dissatisfied	2%	2%	1%	2%
Don't know/Refused	21%	32%	17%	29%
Satisfied (NET)	73%	62%	78%	64%
Dissatisfied (NET)	6%	6%	5%	7%

18. Affordability or cost

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	23%	22%	19%	20%
Somewhat satisfied	40%	46%	43%	48%
Somewhat dissatisfied	22%	20%	24%	26%
Very dissatisfied	13%	10%	12%	6%
Don't know/Refused	2%	2%	2%	-
Satisfied (NET)	63%	68%	62%	68%
Dissatisfied (NET)	35%	30%	36%	32%

19. Customer service

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very satisfied	46%	56%	44%	56%
Somewhat satisfied	39%	34%	40%	35%
Somewhat dissatisfied	6%	5%	7%	4%
Very dissatisfied	5%	2%	7%	2%
Don't know/Refused	4%	3%	3%	4%
Satisfied (NET)	85%	90%	84%	90%
Dissatisfied (NET)	11%	7%	14%	5%

Let's say for a moment that for whatever reason, you were considering a switch away from your current paid TV service provider. Please tell me how important each of the following might be in making your decision in who to switch to. If you don't have a choice in provider, please tell me how important each of these would be to you if you did.

20. Availability of regional sports channels

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	30%	33%	47%	50%
Somewhat important	26%	31%	34%	37%
Not very important	13%	13%	9%	8%
Not important at all	25%	19%	7%	5%
Don't know/Refused	6%	5%	2%	*
Important (NET)	55%	64%	82%	87%
Not important (NET)	38%	31%	16%	12%

21. Availability of movie channels

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	45%	29%	47%	29%
Somewhat important	33%	44%	34%	46%
Not very important	11%	16%	11%	20%
Not important at all	8%	9%	6%	5%
Don't know/Refused	3%	2%	2%	*
Important (NET)	**78%**	**74%**	**80%**	**75%**
Not important (NET)	**19%**	**24%**	**18%**	**25%**

22. Availability of regional sports channels in high definition

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	29%	28%	45%	44%
Somewhat important	25%	26%	33%	33%
Not very important	13%	14%	9%	10%
Not important at all	26%	24%	9%	9%
Don't know/Refused	7%	8%	5%	4%
Important (NET)	**54%**	**54%**	**77%**	**77%**
Not important (NET)	**39%**	**38%**	**18%**	**19%**

23. Availability of movie channels in high definition

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	34%	25%	35%	25%
Somewhat important	36%	36%	41%	38%
Not very important	13%	19%	10%	21%
Not important at all	12%	15%	10%	12%
Don't know/Refused	6%	6%	4%	3%
Important (NET)	**70%**	**61%**	**76%**	**64%**
Not important (NET)	**25%**	**34%**	**20%**	**34%**

24. Affordability or cost

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	77%	82%	76%	83%
Somewhat important	17%	15%	19%	16%
Not very important	1%	1%	2%	1%
Not important at all	3%	1%	3%	1%
Don't know/Refused	2%	1%	1%	-
Important (NET)	94%	97%	94%	99%
Not important (NET)	4%	2%	4%	1%

25. Customer service

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	76%	77%	76%	78%
Somewhat important	19%	18%	20%	18%
Not very important	2%	2%	2%	1%
Not important at all	1%	1%	1%	1%
Don't know/Refused	2%	2%	1%	1%
Important (NET)	94%	95%	96%	97%
Not important (NET)	4%	3%	3%	2%

26. Company reputation

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very important	52%	48%	54%	49%
Somewhat important	29%	36%	32%	39%
Not very important	10%	10%	7%	9%
Not important at all	6%	5%	5%	4%
Don't know/Refused	3%	1%	3%	-
Important (NET)	81%	84%	86%	88%
Not important (NET)	16%	15%	12%	12%

27. Regardless of whether you currently have access to regional sports channels at home, let's say for a moment you are a paid TV service subscriber with regional sports channels in high definition. If another provider were to offer you more channels at the same price, but without HD regional sports channels, how likely would you be to switch to the provider offering more channels but no HD sports channels? Would you be...

	NY Total	Buff Total	NY Sports Fans	Buff Sports Fans
Very likely	11%	10%	10%	8%
Somewhat likely	21%	27%	21%	22%
Not very likely	19%	25%	22%	31%
Not likely at all	40%	33%	41%	35%
Don't know/Refused	8%	5%	6%	4%
Likely (NET)	33%	37%	31%	30%
Not Likely (NET)	59%	58%	63%	66%

Demographics

28. Gender (OBSERVE, DO NOT ASK GENDER)

	NY Total	Buff Total
Male	44%	48%
Female	56%	52%

29. What is your age?

	NY Total	Buff Total
18-24	4%	10%
25-29	3%	3%
30-34	4%	9%
35-39	11%	8%
40-44	12%	15%
45-49	9%	9%
50-54	10%	10%
55-59	9%	10%
60-64	11%	11%
65-74	12%	7%
75 and over	12%	7%
Don't know/Refused	4%	1%

30./31.What is your race?

	NY Total	Buff Total
Hispanic	17%	4%
White	59%	92%
Black	24%	3%
Asian	1%	-
Other	1%	2%
Don't know/Refused (DO NOT ASK)	2%	1%

32. What is the last grade you completed in school?

	NY Total	Buff Total
Grade School	*	2%
Some high school	4%	3%
High school graduate	20%	31%
Technical/vocational	2%	3%
Some college	17%	25%
Graduated college	35%	21%
Professional/Post Graduate	20%	15%
Don't know/Refused (DO NOT ASK)	2%	1%

33. Are there any children under the age of 18 living at home? (IF YES ASK): Can you please tell me how many?

	NY Total	Buff Total
Yes	34%	38%
No	65%	61%
Refused	1%	2%

34. For statistical purposes only, in which of the following categories does your **total** annual household income fall?

	NY Total	Buff Total
$25,000 or less	6%	12%
Between $25,000 and $49,999	13%	21%
Between $50,000 and $74,999	14%	16%
Between $75,000 and $99,999	13%	17%
Between $100,000 and $149,999	11%	8%
Over $150,000	10%	4%
Don't know/Refused	33%	23%

35. Are you currently employed full-time outside the home, employed part-time, self-employed, looking for a job, or are you a homemaker, a student or retired?

	NY Total	Buff Total
Employed full-time	44%	46%
Employed part-time	7%	6%
Self-employed	6%	5%
Looking for work/unemployed	5%	4%
Homemaker	7%	6%
Student	2%	4%
Retired	27%	26%
Don't know/Refused	3%	2%

REGIONS: NY DMA (BY COUNTY)

New York City: 39%

Bronx, NY
Kings (Brooklyn), NY
New York (Manhattan), NY
Queens, NY
Richmond (Staten Island), NY

New York/CT: 30%

Nassau, NY
Orange, NY
Putnam, NY
Fairfield, CT
Dutchess, NY
Rockland, NY
Suffolk, NY
Sullivan, NY
Ulster, NY
Westchester, NY

New Jersey/PA: 33%

Bergen, NJ
Essex, NJ
Hudson, NJ
Hunterdon, NJ
Middlesex, NJ
Monmouth, NJ
Morris, NJ
Ocean, NJ
Passaic, NJ
Somerset, NJ
Sussex, NJ
Union, NJ
Warren, NJ
Pike, PA

REGIONS: BUFFALO DMA (BY COUNTY)

Buffalo: 48%

Erie, NY

South/West Buffalo: 27.9%

Alleghany NY
Mckean PA
~~Potter PA~~
Cattaraugus NY
Chautauqua NY

North/East Buffalo: 24.1%

Genesee NY
Niagara NY
Orleans NY
Wyoming NY