Comcast – The Future of Awesome
Greater Chicago Region

ILLINOIS
Servicing 400+ municipalities and counties in Northern and Central Illinois – including Chicago and suburbs

INDIANA
Servicing 65+ municipalities and counties in Northwest Indiana

MICHIGAN
Servicing 50+ municipalities and counties in Southwest Michigan
A COMMUNITY FULL OF JOBS

The cable industry supports 2.9 MILLION JOBS all over America, contributing $421 BILLION to the US economy. To get a better sense of the kind of jobs we support, explore this community of workers from every corner of the industry.

SOURCE: NCTA
## $1 Billion – Comcast Capital Investments

**(Chicago area since 2014)**

<table>
<thead>
<tr>
<th>COMMUNITY INVESTMENT</th>
<th>TECH LEADERSHIP</th>
<th>ROBUST BUILD-OUT</th>
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</thead>
<tbody>
<tr>
<td><strong>$31 million</strong> cash and in-kind contributions to charitable organizations in 2016</td>
<td>Comcast Ventures is in the top 3 most active corporate venture capital firms in the United States</td>
<td><strong>30 Tbps</strong> network capacity nationwide</td>
</tr>
<tr>
<td>600+ area partner schools with Comcast works to advance digital equity</td>
<td>Comcast was named a 2016 Corporate champion by 1871 and The Chicagoland Entrepreneurial Center</td>
<td><strong>7,000</strong> employees living and working in the Greater Chicago Region</td>
</tr>
<tr>
<td>40,000+ low-income homes connected through Internet Essentials in Chicago since 2011</td>
<td>Comcast launched 1M wireless hotspots in the Chicago area and more than 17 million across the United States</td>
<td><strong>400+</strong> connected data centers nationwide</td>
</tr>
</tbody>
</table>
**COMCAST**

- $8B generated in economic activity
- $351M paid annually in taxes, fees & permits
- $3.2B invested in technology & infrastructure (2011-17)
- 8K employed – includes military personnel & spouses
- $560M invested annually in payroll, benefits & training
- $27.8M invested in communities via cash & in-kinds
- 480K low-income residents connected to internet via Internet Essentials
- 33K volunteer hours donated – Comcast Cares Day
- 242 new patents granted to Comcast in 2017

**NCTA – The Internet & Television Association**

- 3 main cable operators: Comcast, Charter & Mediacom
- $14B total economic impact
- >93K direct & indirect jobs
- >10K cable operator employees
- 75-90 Mbps average peak internet connection speed
## COMCAST

- >$1B generated in economic activity
- >$119M paid annually in taxes, fees & permits
- >$1.2B invested in technology & infrastructure (2011-17)
- 1.8K employed – includes military personnel & spouses
- >$125M invested annually in payroll, benefits & training
- >$1.6M invested in communities via cash & in-kinds
- 112K low-income residents connected to internet via Internet Essentials
- >8K volunteer hours donated – Comcast Cares Day
- 242 new patents granted to Comcast in 2017

## NCTA – The Internet & Television Association

- 3 main cable operators: Comcast, Charter & Mediacom
- $5B total economic impact
- >33K direct & indirect jobs
- 3600 cable operator employees
- 75-90 Mbps average peak internet connection speed
### COMCAST

- $3B generated in economic activity
- $161M paid annually in taxes, fees & permits
- $2B invested in technology & infrastructure (2011-17)
- 3,900 employed – includes military personnel & spouses
- $315M invested annually in payroll, benefits & training
- $5.6M invested in communities via cash & in-kinds
- 196,000 low-income residents connected to internet via Internet Essentials
- 21,000 volunteer hours donated – Comcast Cares Day
- 242 new patents granted in 2017

### NCTA – The Internet & Television Association

- 3 main cable operators: Comcast, Charter & Mediacom
- $9.75B total economic impact
- 65,000 direct & indirect jobs
- 7,000 cable operator employees
- 75-90 Mbps average peak internet connection speed
Market Growth
Then & Now: Pay TV Competition

1995: 95%
2006: 69%
2017: 54.1%

CABLE VIDEO
DBS
TELCO TV
OTHER

SOURCE: NCTA
Tracking Cable’s Investment in Infrastructure

SOURCE: NCTA
Tracking Cable’s Top Internet Speeds

SOURCE: NCTA
Broadband Adoption

CLOSING THE DIGITAL DIVIDE

NUMBER OF FAMILIES CONNECTED TO THE INTERNET THROUGH CABLE’S BROADBAND ADOPTION PROGRAMS

Source: Comcast “Internet Essentials” Annual Report and company-reported data

2013: 220+ K
2014: 350+ K
2015: 500+ K
2016: 750+ K
2017: 1.25+ M
2018: 1.5+ M

SOURCE: COMCAST INTERNET ESSENTIALS ANNUAL REPORT & NCTA
Political Landscape
U.S. Senate +6 Republicans

- 2018 changes: AZ (Sinema-D), FL (Scott-R), IN (Braun-R), MO (Hawley-R), ND (Cramer-R), NV (Rosen-D)
- 116th Congress:
  - 53 Republicans / 47 Democrats
  - 76 men & 24 women – most women in U.S. history
  - 2 Asian / 2 African-American / 4 Hispanic / 2 LGBTQ

U.S. House of Representatives +38 Democrats

- 2018: Democrats gained majority; won at least 40 U.S. House seats
- 116th Congress: 235 Democrats / 197 Republicans / 3 vacant
- California Leadership: Speaker Nancy Pelosi / Minority Leader Kevin McCarthy

Governors +4 Republicans

- 36 governors were up for election last year; post 2018 election: 27 Republicans / 23 Democrats
- 2018 Democratic Pick-Ups (7): IL, KS, ME, MI, NV, NM & WI
**IL Constitutional Offices +Democrats**

- Democrats swept all statewide offices – **first time since 2006**
- Governor: Pritzker (D) 53% defeated incumbent Rauner (R) 39%
- AG: Raoul (D) 54% defeated Harold (R) 43%

**IL Congressional Delegation +8 Democrats**

- Post 2018 election: 13 Democrats / 5 Republicans
- 6th District: Casten (D) 54% defeated incumbent Roskam (R) 46%
- 14th District: Underwood (D) 53% defeated incumbent Hultgren (R) 48%

**IL State Senate +21 Democrats**

- 101st General Assembly: 40 Democrats (veto-proof majority) / 19 Republicans
- Ties 2012 election for **greatest number of Democratic Senators**
- 20 women senators – **most in Illinois history**

**IL House of Representatives +30 Democrats**

- 101st General Assembly: 74 Democrats (veto-proof majority) / 44 Republicans
- **Most Democratic House members** since Speaker Madigan assumed control in 1982
IN Constitutional Offices +Republicans
- Republicans hold all statewide offices – including both U.S. Senators Young & Braun
- 2018: Braun (R) defeated incumbent U.S. Sen. Donnelly (D)
- Current Governor Holcomb was Lt. Governor under Mike Pence

IN Congressional Delegation +5 Republicans
- Post 2018 election: 7 Republicans / 2 Democrats
- No change in party counts from 2016 to 2018 elections

IN State Senate +30 Republicans
- 121st General Assembly: 40 Republicans / 10 Democrats
- Post 2018 election: Democrats gained 1 seat

IN House of Representatives +34 Republicans
- 121st General Assembly: 67 Republicans / 33 Democrats
- Post 2018 election: Democrats gained 3 seats
**MI Constitutional Offices +Democrats**
- Democrats hold all statewide offices – including both U.S. Senators Stabenow & Peters
- 2018 Gubernatorial election:
  - open seat; incumbent Governor Snyder (R) was term-limited
  - former Minority Leader Whitmer (D) defeated former AG Schuette (R)

**MI Congressional Delegation even**
- Post 2018 election: 7 Democrats / 7 Republicans
- Democrats gained 3 seats to even the count

**MI State Senate +6 Republicans**
- 99th Legislature: 22 Republicans / 16 Democrats
- Post 2018 election: Republicans lost supermajority

**MI House of Representatives +6 Republicans**
- 99th Legislature: 58 Republicans / 52 Democrats
- Post 2018 election: Democrats gained 5 seats
The Next Mayor of Chicago
CITY OF CHICAGO

1 Mayor
50 Aldermen / Alderwomen
Officially Non-Partisan
Unofficially...
48 Democrats
1 Republican
1 Independent

GOVERNMENT ACTION VS. INACTION

Inaction at the Federal & State levels has forced the County & City to act...
Revenue
Paid Time Off
Right of Ways
Wage Increase

COOK COUNTY

1 County Board President
17 Commissioners...
15 Democrats
2 Republicans
Legislative Outlook
Federal Issues & Trends

EXECUTIVE
Net Neutrality / Title II
5G Regulatory Power
NPRM on Franchises
Broadband Deployment & Adoption

LEGISLATIVE
Net Neutrality / Title II
Small Cell
Right to Privacy
Rural Broadband

JUDICIAL
Net Neutrality – FCC vs. states
Wireless Spectrum Licensing
Pole Attachments
9-1-1
Key Issues
- Net Neutrality
- Rights-of-Ways / Small Cell
- Privacy / “Right to Know” / Geolocation
- Direct Broadcast Satellite (DBS) Parity
- Rural & Low-Income Broadband
- Minimum Wage Increase

Hot Bills
- HB 1582 – Net Neutrality / creates Broadband Procurement and Disclosure Act
- HB 2784 / HB 3357 / HB 3358 – Privacy Bills
- HB 3359 – DBS Parity
- HB 1575 – Rural Utility Infrastructure Investment (Rural Broadband)
- HB 2134 / HB 2785 – Geolocation Bills
- HB 2736 / SB 2149 – Right to Know Bills

Important Dates
- April 2 – Consolidated General Election
- May 31 – Legislative Session Adjournment
Key Issues
- Rural Broadband and Funding
- Utility Relocation
- Hate Crimes

Hot Bills
- SB 460 – Rural Broadband development
- SB 461 – Rural Broadband development funding
- SB 517 – Utility Relocation for Road Projects

Important Dates
- Senate 2nd reading deadline: 2/25  Senate 3rd reading deadline: 2/26
- House 2nd reading deadline: 2/21  House 3rd reading deadline: 2/25
- Midnight, April 29 – Adjournment
Key Issues
- Rural Broadband Funding
- Infrastructure Funding
- Data Breach
- Auto Insurance No Fault

Hot Bills
- Bills are introduced through session.

Important Dates
- January 1, 2019 – Session Begins
- December 21, 2020 – Session Ends
Chicago MSA

EAST/WEST TOLLWAY: 2,765,823 (TOTAL POPULATION)

NORTHWEST SUBURBS: 2,514,768 (TOTAL POPULATION)

CENTRAL BUSINESS DISTRICT: 5,081,573 (TOTAL POPULATION)

AGE & EDUCATION

AGE 20-35:
- E/W Tollway: 601,041
- NW Suburbs: 531,013
- CBD: 1,309,398

AGE 35+:
- E/W Tollway: 2,164,782
- NW Suburbs: 1,983,755
- CBD: 3,772,175

BACHELOR'S:
- E/W Tollway: 482,829
- NW Suburbs: 479,080
- CBD: 826,365

GRADUATE/PROFESSIONAL:
- E/W Tollway: 299,250
- NW Suburbs: 285,123
- CBD: 578,458
Comcast – The Backbone of Chicago’s Digital Economy

<table>
<thead>
<tr>
<th>51,000</th>
<th>100 Gbps</th>
<th>2 Gbps</th>
<th>1.6M</th>
<th>FTTB</th>
<th>FTTU</th>
<th>CustomGig</th>
</tr>
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<tbody>
<tr>
<td>miles of broadband infrastructure in Chicago area</td>
<td>commercial data rates available</td>
<td>residential data rates available</td>
<td>wi-fi hotspots throughout Chicago</td>
<td>fiber-to-the-building options available</td>
<td>fiber-to-the-unit options available</td>
<td>customized gig solutions available</td>
</tr>
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</table>
Next Gen Services Delivered by Comcast

CUSTOMER EXPECTATIONS
- Always Connected
- One Stop Shop
- Unified Experience
- Simple & Easy to Use
- Personalized for Me
- Always in Control
- Ahead of the Curve

COMCAST FOUNDATIONAL CAPABILITIES
- Fiber Network
- Mobile
- Smart City
- Wi-Fi + Digital Home
- Venue Management
- Arena Solutions
- Video + Entertainment
- Business Services
- Curated Partnerships
IoT: Comcast MachineQ (LoRa) Network

Tower-and-building-deployed gateways provide broad coverage across the city

Cable-strand-deployed gateways provide dense indoor coverage

Picocell placements for deep indoor coverage

Multitude of sensors and applications across numerous verticals
Investment in Data Management

One billion.
Since 2014, Comcast has invested more than $1 billion in capital expenditures in Chicago.
Thank you