COMCAST

GOVERNMENT & EXTERNAL AFFAIRS

Matthew Summy

Vice President
Government & External Affairs
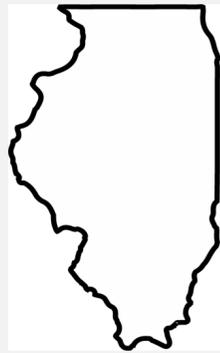Comcast – Greater Chicago Region

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

Industry Impact

GOVERNMENT
COMCAST
& EXTERNAL AFFAIRS

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.

DOWN IN THE LAB
Thousands of **CODERS, PROGRAMMERS** and **DEVELOPERS** create interfaces, design **TV APPS** and build **WEB PLATFORMS** for **AMERICA'S INTERNET AND TV NETWORKS**.

HIGH IN AN OFFICE BUILDING
Experts in a variety of disciplines work in communities across the country to **MARKET, PLAN** and **DELIVER** cable services.

AT THE TV STUDIOS
Every time a new cable show is green-lit **AMERICA'S MOST TALENTED ACTORS, DIRECTORS,** and **KEY GRIPS** get to work.

DEEP IN THE RACKS
ENGINEERS are hard at work keeping the backbone of the internet working.

IN THE WRITERS ROOM
WRITERS, ILLUSTRATORS and **OTHER CREATIVE PROFESSIONALS** are imagining the next great story and making sure there will never be a shortage of award-winning TV.

UP IN A CHERRY PICKER
Super-fast internet wouldn't be possible without the thousands of **WORKERS CLIMBING, INSTALLING,** and **UPGRADING** the wires that crisscross America.

AT THE CUSTOMER CARE CENTER
CUSTOMER SERVICE AGENTS AROUND THE COUNTRY are ready to lend a hand and get your internet and TV services working, day or night.

SOURCE: NCTA

GOVERNMENT COMCAST & EXTERNAL AFFAIRS

$1 Billion – Comcast Capital Investments
(Chicago area since 2014)

COMMUNITY INVESTMENT

$31 million
cash and in-kind contributions to charitable organizations in 2016

600+
area partner schools with Comcast works to advance digital equity

40,000+
low-income homes connected through Internet Essentials in Chicago since 2011

TECH LEADERSHIP

COMCAST VENTURES.

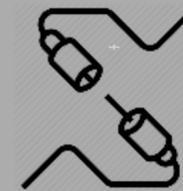Comcast Ventures is in the top 3 most active corporate venture capital firms in the United States

1871

Comcast was named a 2016 Corporate champion by 1871 and The Chicagoland Entrepreneurial Center

Wi Fi

Comcast launched 1M wireless hotspots in the Chicago area and more than 17 million across the United States
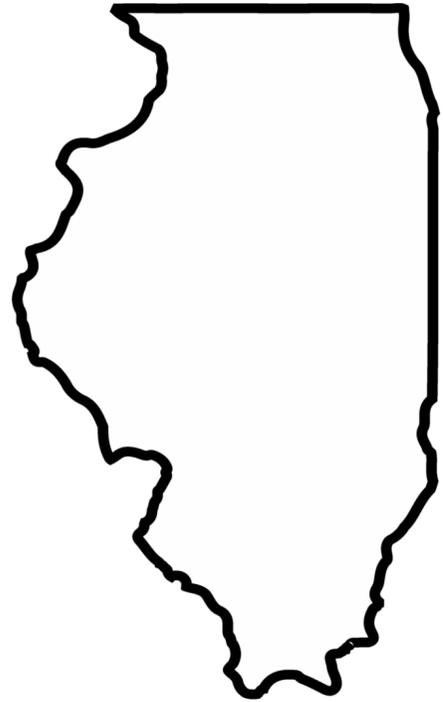
ROBUST BUILD-OUT

30 Tbps
network capacity nationwide

7,000
employees living and working in the Greater Chicago Region

400+
connected data centers nationwide
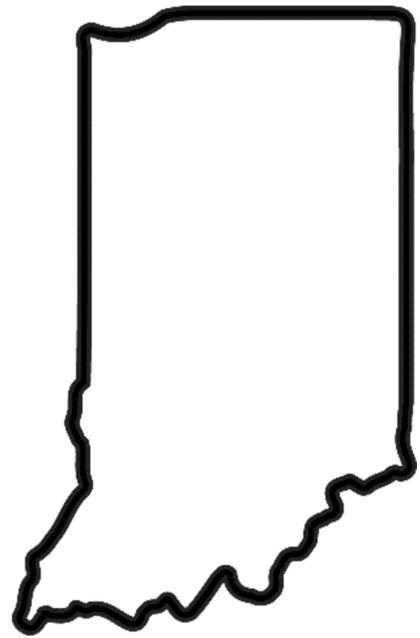
ECONOMIC & JOBS ENGINE

TECHNOLOGY & INNOVATION LEADER

GOVERNMENT & EXTERNAL AFFAIRS

COMCAST

ILLINOIS

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

ECONOMIC & JOBS ENGINE

TECHNOLOGY & INNOVATION LEADER

GOVERNMENT
COMCAST
& EXTERNAL AFFAIRS

INDIANA

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

ECONOMIC & JOBS ENGINE

TECHNOLOGY & INNOVATION LEADER

GOVERNMENT
COMCAST
& EXTERNAL AFFAIRS

MICHIGAN

COMCAST

$3B generated in economic activity

>$161M paid annually in taxes, fees & permits

>$2B invested in technology & infrastructure (2011-17)

3.9K employed – includes military personnel & spouses

>$315M invested annually in payroll, benefits & training

>$5.6M invested in communities via cash & in-kinds

196K low-income residents connected to internet via Internet Essentials

>21K volunteer hours donated – Comcast Cares Day

242 new patents granted in 2017
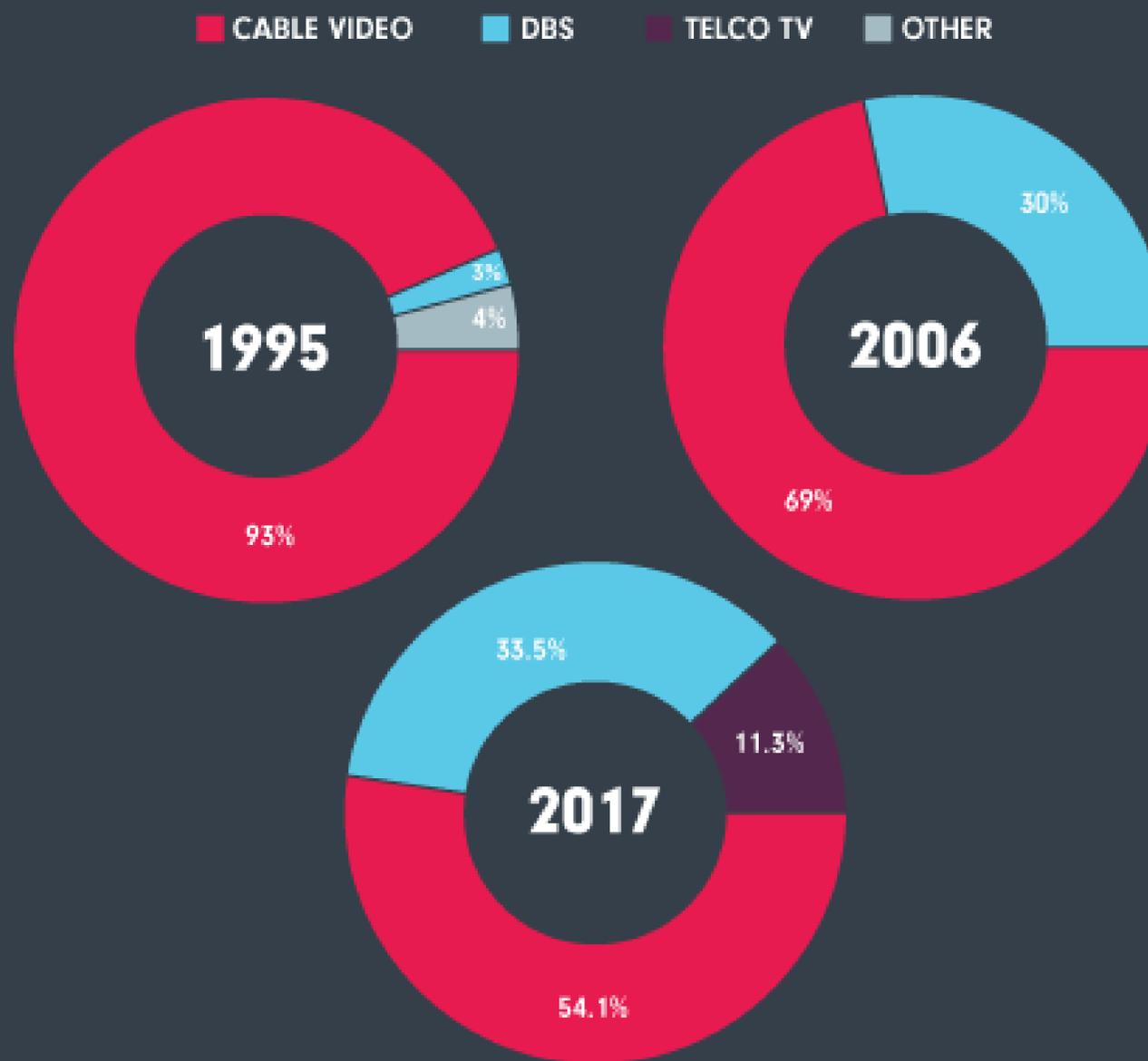
NCTA – The Internet & Television Association

3 main cable operators: Comcast, Charter & Mediacom

>$9.75B total economic impact

>65K direct & indirect jobs

>7K cable operator employees

75-90 Mbps average peak internet connection speed
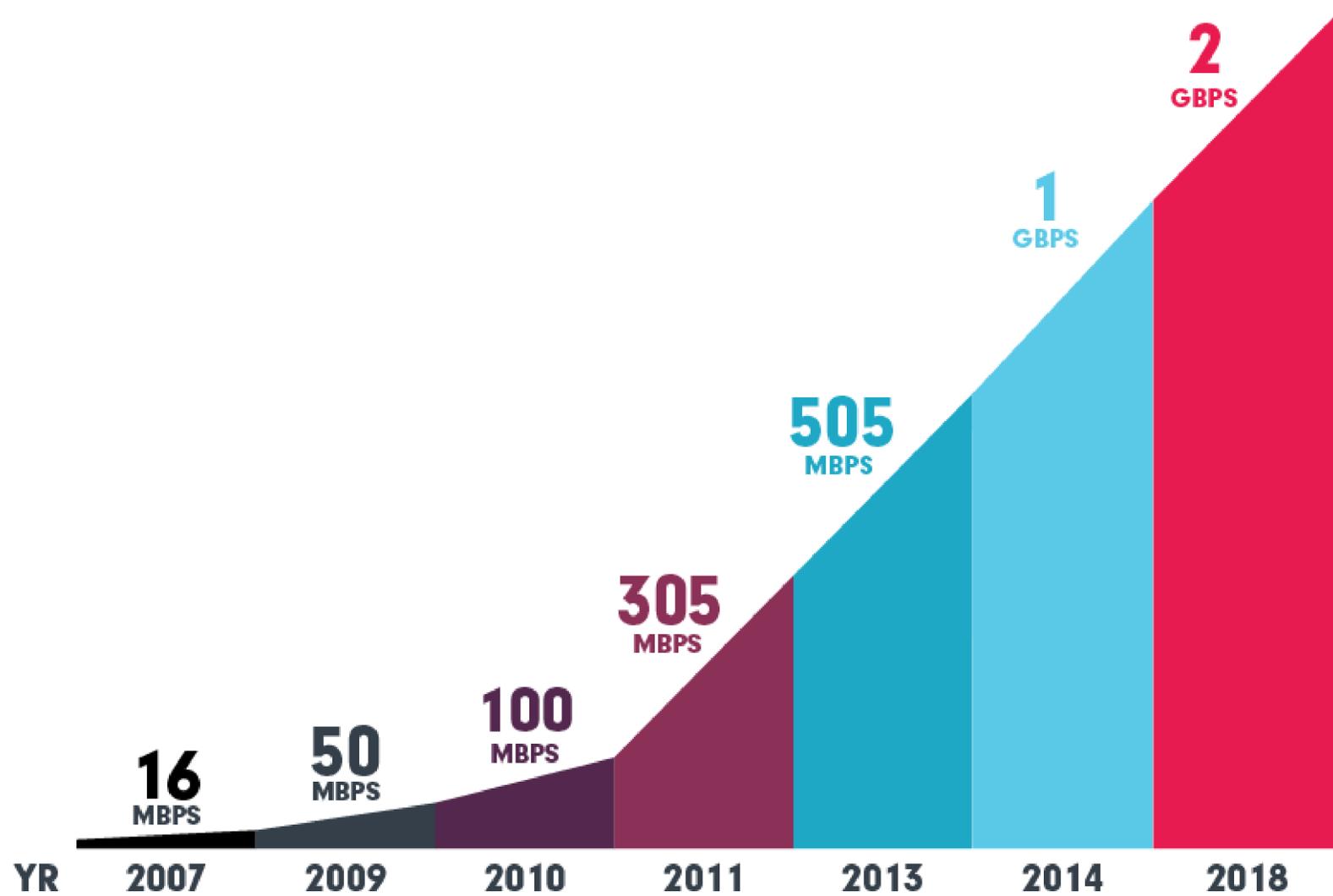
Market Growth

Then & Now: Pay TV Competition

Tracking Cable's Investment in Infrastructure

$275B INVESTMENT TOTAL

$187.6B INVESTMENT TOTAL

$119.7B INVESTMENT TOTAL

$61.4B INVESTMENT TOTAL

98 99 00 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17

SOURCE: NCTA

Tracking Cable's Top Internet Speeds

SOURCE: NCTA

Broadband Adoption
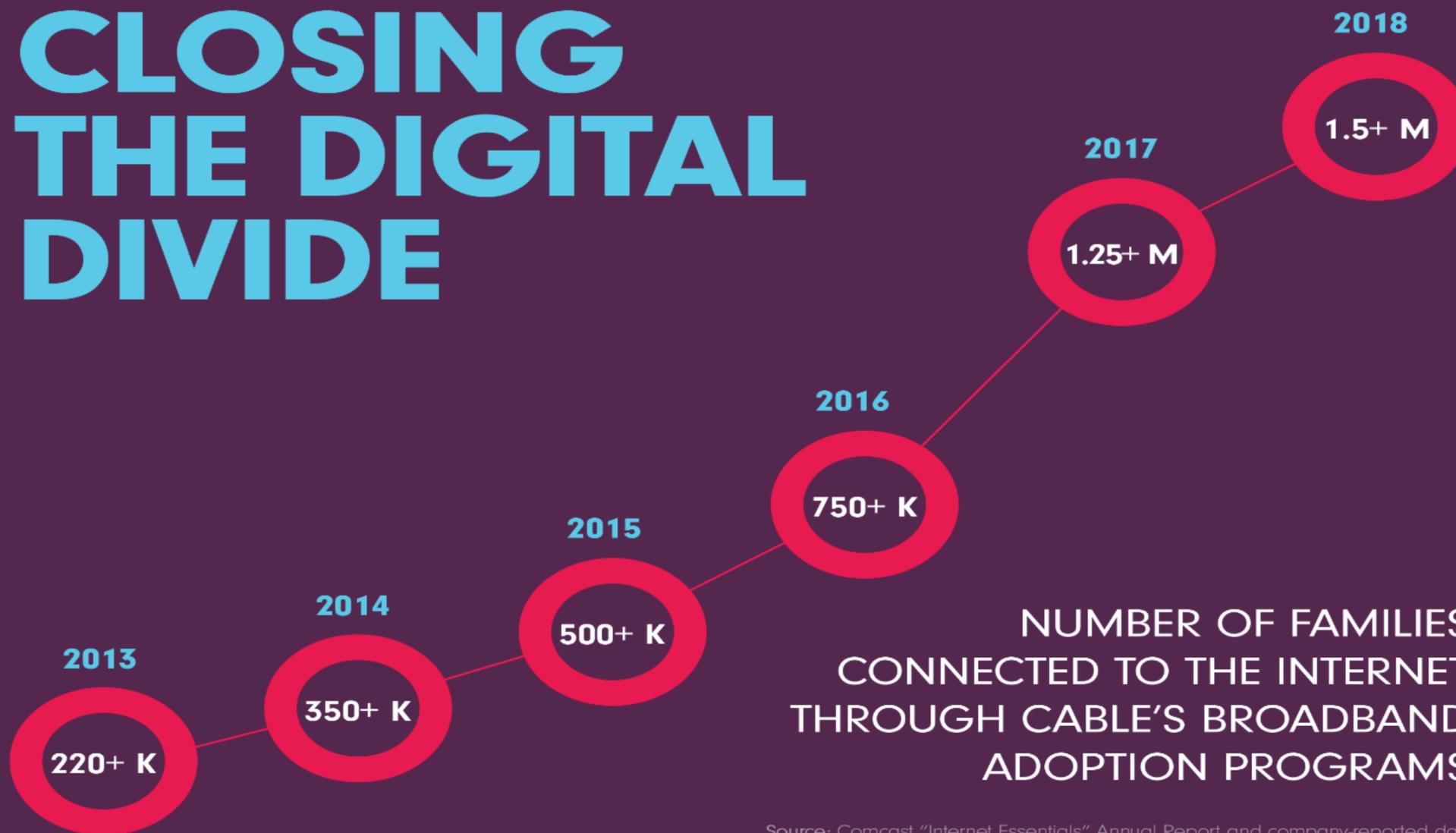
Growth in Cable Broadband Customers

OVER 66 MILLION BROADBAND CUSTOMERS IN 2017
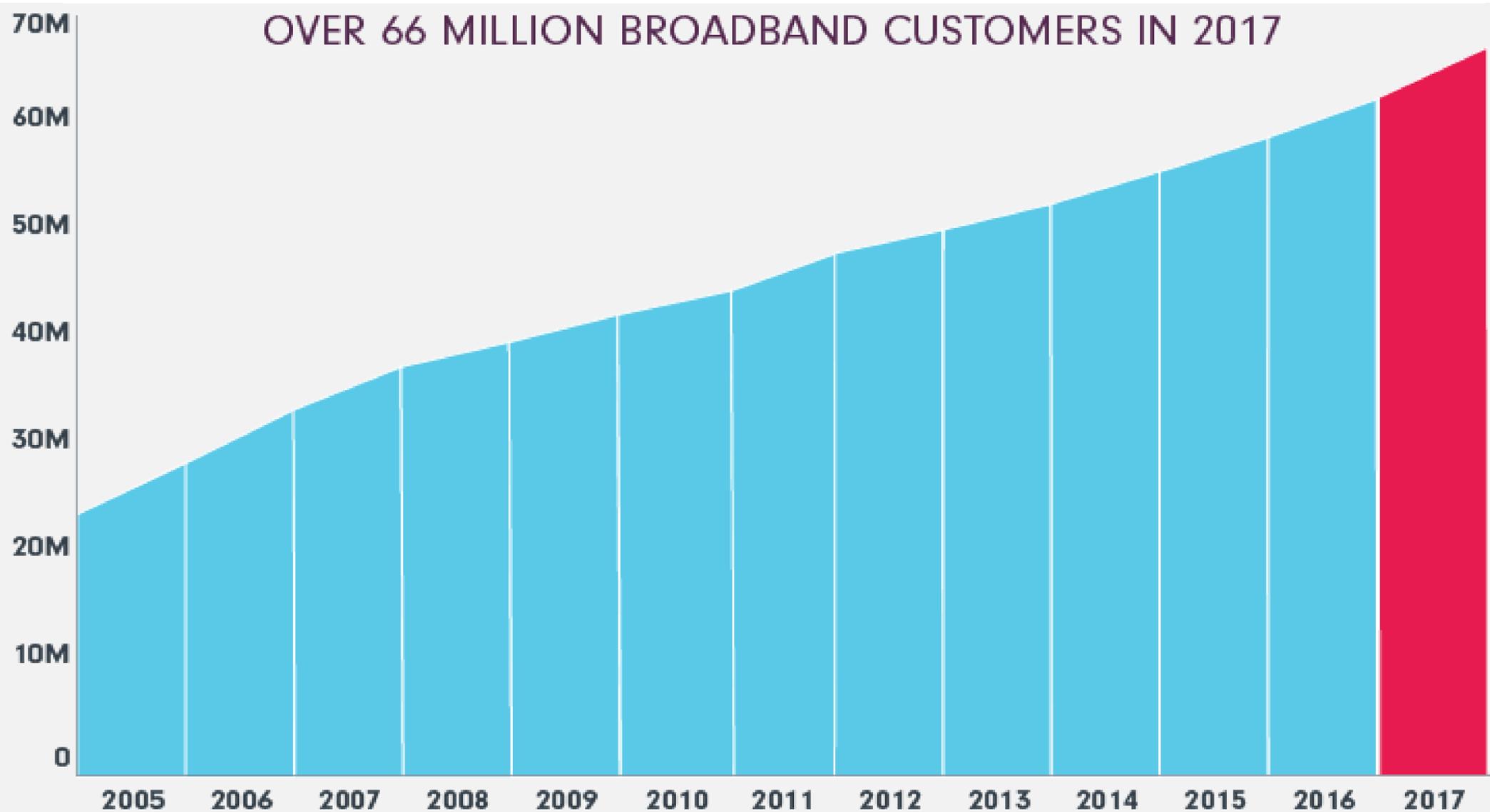
SOURCE: NCTA

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
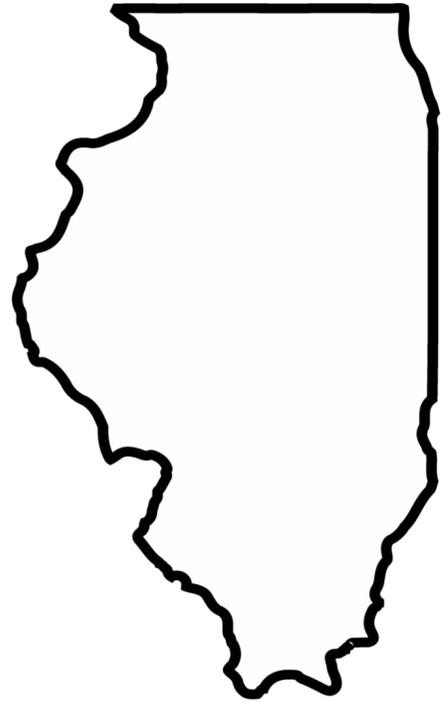
IL Constitutional Offices **+Democrats**

➤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

ILLINOIS
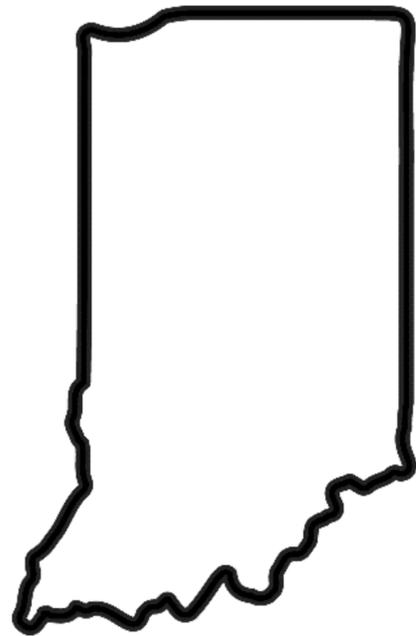
IN Constitutional Offices **+Republicans**

➢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

INDIANA

MI Constitutional Offices **+Democrats**

➢Democrats hold all statewide offices – including both U.S. Senators Stabenow & Peters

➢2018 Gubernatorial election:
- o open seat; incumbent Governor Snyder (R) was term-limited
- o 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

MICHIGAN

The Next Mayor of Chicago

SOURCE: CHICAGO TRIBUNE

GOVERNMENT
ACTION VS. INACTION

CITY OF CHICAGO

1 Mayor

50 Aldermen / Alderwomen

Officially Non-Partisan

Unofficially…

48 Democrats

1 Republican

1 Independent

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
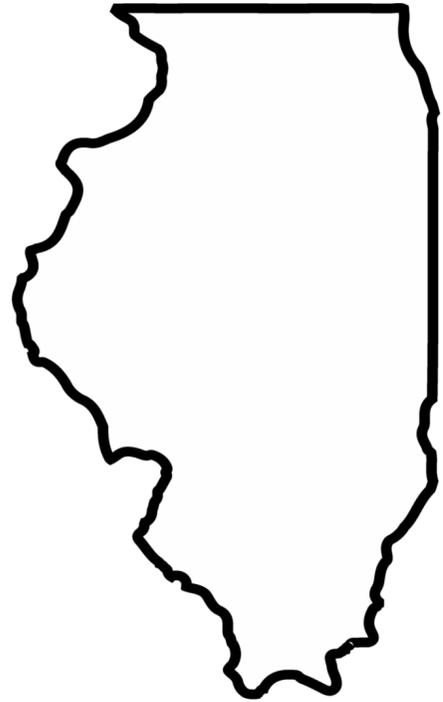
Key Issues

➤ 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

ILLINOIS
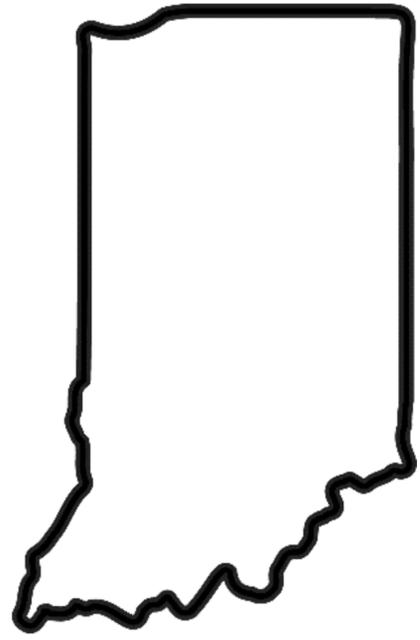
Key Issues

➢ 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

INDIANA

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

MICHIGAN

Comcast Solutions

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

A G E & E D U C A T I O N

AGE 20-36
- E/W TOLLWAY **601,041**
- NW SUBURBS **531,013**
- CBD **1,309,398**

AGE 36+
- 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**
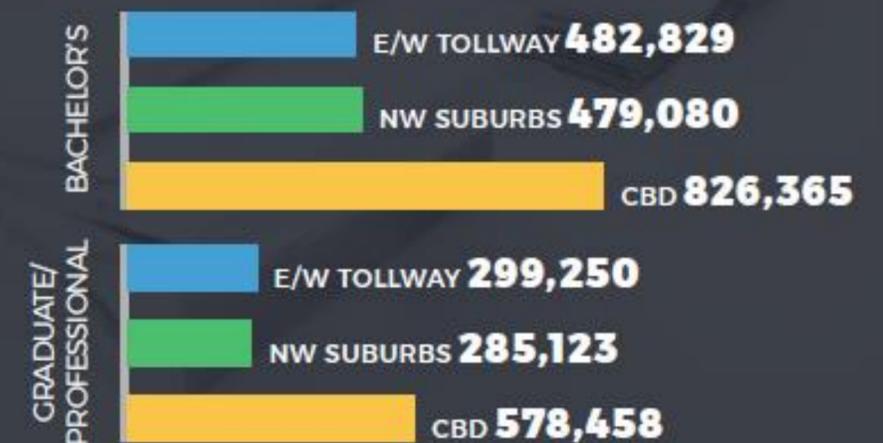
Comcast – The Backbone of Chicago's Digital Economy

51,000	100 Gbps	2 Gbps	1.6M	FTTB	FTTU	CustomGig
miles of broadband infrastructure in Chicago area	commercial data rates available	residential data rates available	wi-fi hotpots throughout Chicago	fiber-to-the-building options available	fiber-to-the-unit options available	customized gig solutions available

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

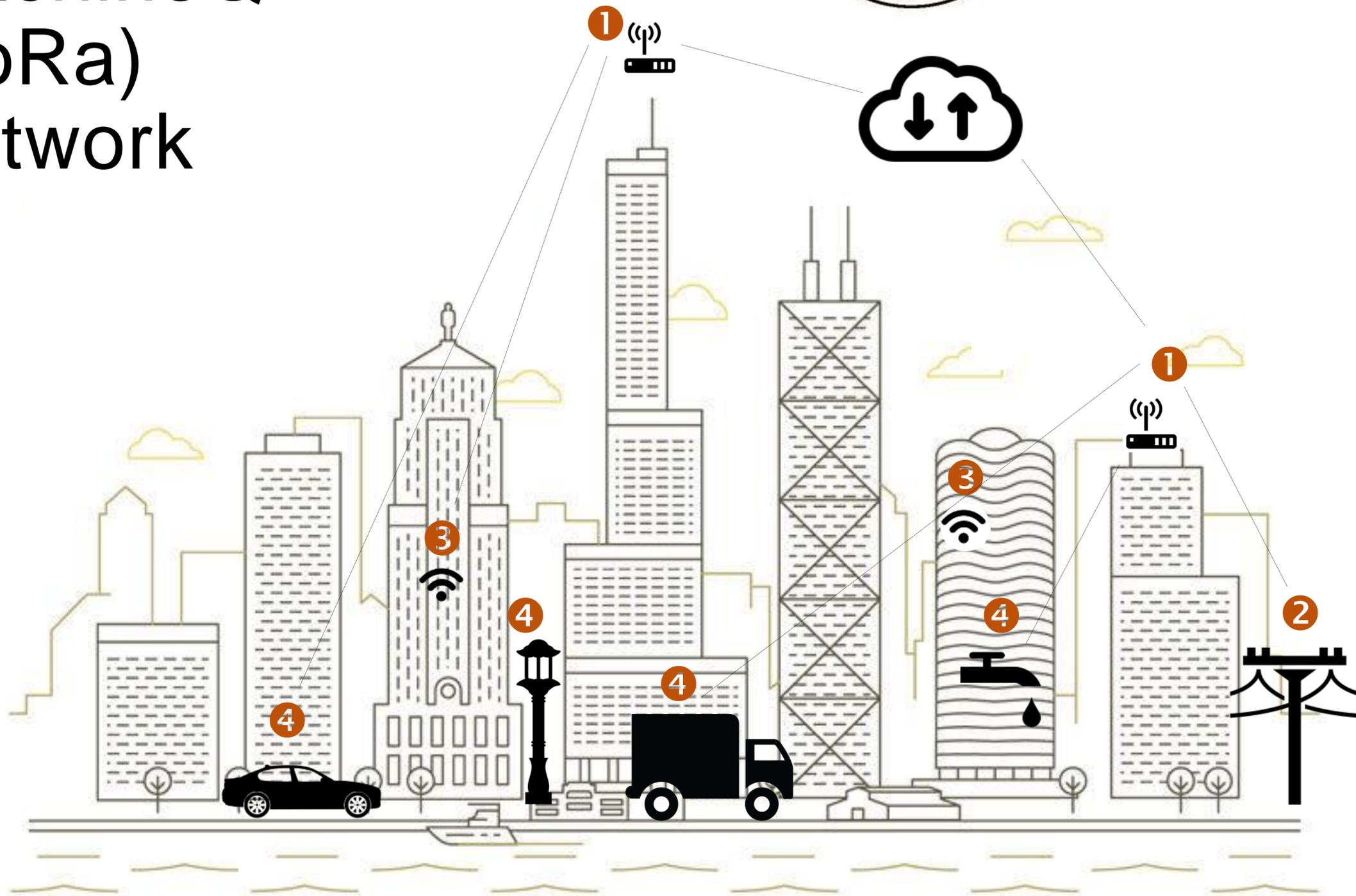VENUE MANAGEMENT

ARENA SOLUTIONS
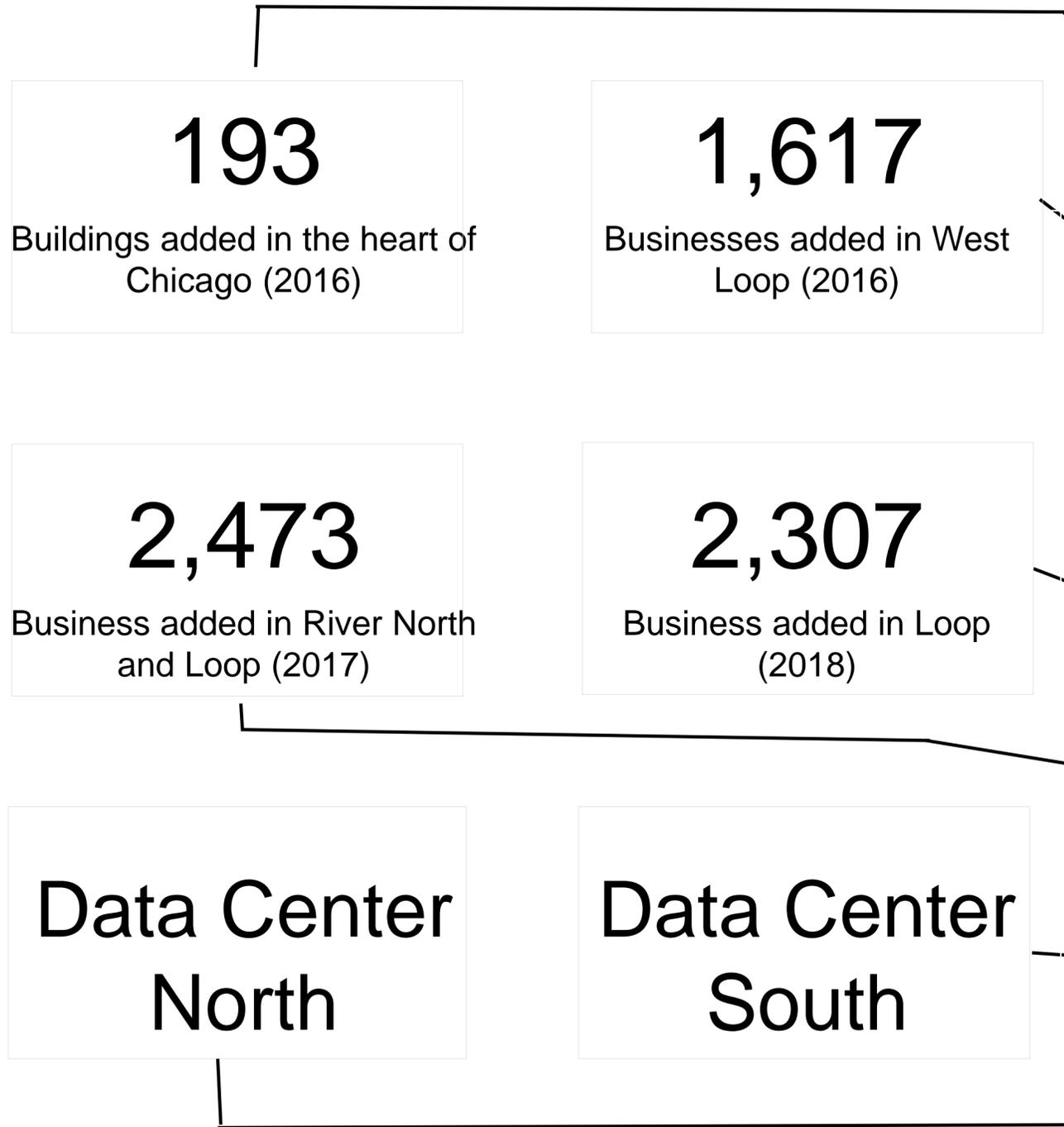
VIDEO + ENTERTAINMENT

BUSINESS SERVICES

CURATED PARTNERSHIPS

IoT: Comcast MachineQ (LoRa) Network

GOVERNMENT
COMCAST
& EXTERNAL AFFAIRS

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

2. Cable-strand-deployed gateways provide dense indoor coverage

3. Picocell placements for deep indoor coverage

4. Multitude of sensors and applications across numerous verticals

Investment in Data Management

193
Buildings added in the heart of Chicago (2016)

1,617
Businesses added in West Loop (2016)

2,473
Business added in River North and Loop (2017)

2,307
Business added in Loop (2018)

Data Center North

Data Center South

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

Thank you