A Whole New World:
The Latest from Telecom Providers

**Moderator**
Kathleen Austin

**Panelists**
Christopher Curtin, Verizon
Peter Feeney, AT&T Connected Communities
Vickie Rodgers, Cox Communications
Mike Slovin, Comcast
Connecting MDU Residents to the Content and People that Matter Most

Peter Feeney
Vice President, MDU and Connected Communities
AT&T
Where is AT&T GigaPower?
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Vickie Rodgers
Executive Director, MDU Strategy & Operations
Cox Communications
Who Lives in MDUs?

Source: 2013 American Housing Survey, 2013 Census, Strategy Team analysis
What Do Your Residents Want?

Millennial Hierarchy of Preferences

1. Internet Speed
2. Digital Fitness
3. Increased Outdoor Space
4. Green Initiatives
5. Home Automation

Millennials have an average of 5-10 connected devices

86% of Millennials want to live in communities that offer or include internet as part of the rent

Percentage of Millennials willing to relocate if they are not happy with internet speeds 64%
Cox Signature: Connecting the Community

Ultra Fast Internet
Blazingly fast GB speeds via Fiber Connections – Power Cox High speed Internet, Voice and Video services to each residence

Smart Home
Cox Home Security with integrated video monitoring, and a suite of home and energy management features

Community Wide Wi-Fi
High speed Wi-Fi connectivity across the Community providing guests access to the internet from all communal areas

24 x 7 Support
Always on support for your technology needs – from customer support for your Cox Signature services, or even tech support for your devices and software

Healthy Living*
Connect a range of wellness devices to track your health metrics. Access to doctors and vets conveniently from residences with virtual consultations

Cloud-Services*
Access to a suite of cloud delivered home applications, including gaming, storage, my TV, video conferencing and many more

*Future Roadmap

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Delivering High Speed Access Across Cox’s Footprint

**G1GABLAST** deployed across 15 of our 22 markets

- The fastest speed available in nearly 88% of our footprint!
- Offer ALL consumers the fastest available speed!
- Cox customers get more speed for less money!
- Increased internet speeds 4X over the past 2 years for both current and new customers!
- Well positioned to continue to increase speed to meet customer’s needs across the entire footprint

*Remaining markets launching in 2016*
Mobilizing the Resident Experience

Targeting Millennials
- 58% of all movers and 40% of MDU market
- 66% typically use 3+ connected devices in home simultaneously vs. 46% total market
- 85% use at least one online video source vs. 68% total market
- 34% of viewing time is online vs. 18% total market
- 62% say they wish they had more ability to monitor their home using their mobile device vs. 43% total market

Community Wi-Fi Access (50 Mbps)
- Home as a Hot Spot* (dual SSID)
- Metro Wi-Fi (>400K hotspots)

Best in Class Connectivity enables mobilized life

Mobilized Video Experience

Smart Home and Security

*On Future Roadmap
Bringing Innovative Health Solutions to Market

Targeting Baby Boomers

- 45M Americans are 65+, reaching 71M by 2030
- The number of renters who are 65 or older will reach 12.2 million by 2030, more than double the level in 2010
- ~80% of older adults have 1 chronic condition, 50% have 2+ chronic conditions
- 90% of people over age 65 want to stay in their home for as long as possible
Why Cox

**SPEED**

We Deliver the Fastest Internet Speeds

**INNOVATION**

We Are Committed to Investing in the Future

**CUSTOMER EXPERIENCE**

We Are Chosen By Customers More Often
Mike Slovin – Vice President, Sales and Sales Operations
Data trends: Mobile devices at home and on the go.

The average adult’s hours per day with digital media.

- Mobile usage increased to 3 hours per day vs. 20 minutes in 2008.
- Residents are consuming more content in more places.
- Multiple-device usage at home continues to increase exponentially.
- Consumers expect faster speeds and more Wi-Fi hotspots.
Better Network: The path to gigabit speeds.

- XFINITY® increased data speeds 14 times in the last 13 years.
- XFINITY Communities has brought fiber-based Advanced Communities Network to over 1.1 million units.
- DOCSIS 3.1 launch supports the fastest speeds leveraging existing cable networks to offer multi-gigabit services with ubiquitous coverage.
- XFINITY delivers the fastest Internet in America, according to Speedtest.net*.

*Based on testing of top 10% of Internet service providers’ download speeds reported at speedtest.net/awards/us. Actual speeds vary. Speedtest is a trademark of Ookla, LLC. Used under license. Not available in Kansas City, MO, Provo, UT, Chattanooga, TN, or Vermont.
Video trends: Watching more with shift to other platforms

Q2 ’15 v. Q2 ’14: Net change in video time spent

1.23 Billion hours (Q2 ’15) → +16% → 1.35 Billion hours (Q2 ’14)

- DVR + VOD: +3% from .08 to .15
- Multimedia Device: +16% from .15 to .33
- Game Console: +16% from .33 to .69
- Desktop: +10% from .69 to .85
- Mobile: +42% from .85 to 1.23
Better Entertainment: Technology adoption along customer journey.

On campus:
- XFINITY On Campus™

Off campus:
- XFINITY® TV app
- Cloud-based DVR
- Stream

First job / apartment:
- X1 with Voice Remote
- Internet Plus

Family:
- XFINITY® Home
- X1 with Voice Remote
- XFINITY Connect app
- Kids Zone

Empty nester:
- Share app
- Talking guide
Better Service: We’re creating a customer-first culture, top to bottom.

- Commitment to increased property support with dedicated Community Account Representatives.
- The XFINITY My Account app — now on X1, is rolling out new Tech ETA feature.
- Co-Pilot trial for X1 — tech support can see a customer’s TV screen to help with questions and navigation.
- Get Started – immediate access to thousands of hit TV shows and connect to XFINITY Wi-Fi hotspots.
- Expanding Social Care team
- Adding more than 5,500 new service roles as part of a multi-year customer experience transformation.
Better Network.
Experience custom fiber solutions for Gigabit speeds with XFINITY’s Advanced Communities Network.

Better Entertainment.
Give your residents a one-of-a-kind interactive TV experience with X1.

Better Service.
Introducing the Community Account Representative: your property’s personal concierge.
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Chris Curtin
Verizon Enhanced Communities
Agenda

• Introducing a New Brand
• The Millennial Influence
• Fios Product Evolution
  • Custom TV
  • Broadband Speed Roadmap
• Content Everywhere
  • Fios Mobile Apps
• The Future of Fios
Verizon Fios Coverage Map

The Early Vision:
Enabling the future of broadband.
$23 Billion to create America’s largest 100% fiber-to-the-home network.

Today, Fios is available in nearly 100,000 multi-family communities (approximately 6M living units)

Northeast (MA, RI, CT, NY)
New York City
Mid-Atlantic (PA, DE, NJ)
Potomac (VA, DC, MD)
Florida (Tampa Bay)
Texas (Dallas Metro)
California (LA, Palm Valley)
The New Demand: Millennials Shaping the Market

Big Idea:
By 2020, Millennials will make up over 50% of the US workforce*

**Millennials’ world revolves around technology. Meaning Data is KING!**

- 59% of Millennials would rather rent a home than buy**
- Product quality is more important than price (Better Broadband Matters)**
- 87% use between 2 and 3 tech products every day**


**http://millennialbranding.com/2015/millennial-consumer-study/

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Fios Custom TV

- **Big Idea:**
  Consumers still interact with their TV for entertainment more than any other device.
- **Verizon offers customers more choice based on favorite programming.**

<table>
<thead>
<tr>
<th>Category</th>
<th>Channels</th>
</tr>
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<tbody>
<tr>
<td>Lifestyle</td>
<td>18 channels</td>
</tr>
<tr>
<td>Bravo, History, A&amp;E, TLC and more</td>
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</tr>
<tr>
<td>Entertainment</td>
<td>10 channels</td>
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<tr>
<td>TBS, USA, SyFy and more</td>
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<tr>
<td>News &amp; Info</td>
<td>15 channels</td>
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<tr>
<td>HLN, Science, C-SPAN and more</td>
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<tr>
<td>Pop Culture</td>
<td>14 channels</td>
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<tr>
<td>CMT, E!, IFC and more</td>
<td></td>
</tr>
<tr>
<td>Kids</td>
<td>12 channels</td>
</tr>
<tr>
<td>Disney, TV Land, Nick and more</td>
<td></td>
</tr>
<tr>
<td>Sports</td>
<td>Up to 13 channels</td>
</tr>
<tr>
<td>ESPN, Big Ten ESPN U and more</td>
<td></td>
</tr>
<tr>
<td>Sports Plus**</td>
<td>Up to 9 channels</td>
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<tr>
<td>Regional, NFL, Golf and more</td>
<td></td>
</tr>
</tbody>
</table>

Up to 150+ basic channels, (25+ in HD)
45 Music Plus channels
+2 channel packs
Additional channel packs may be ordered separately for monthly fee
Fios Broadband Roadmap

Big Idea:
Symmetrical broadband speeds adapt ahead of customer demand. Speeds that were once considered top tier are now entry level.

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry</td>
<td>15M/5M</td>
<td>25M/25M</td>
<td>50M/50M</td>
</tr>
<tr>
<td>Mid</td>
<td>25M/15M</td>
<td>50M/50M</td>
<td>100M/100M</td>
</tr>
<tr>
<td>Upper</td>
<td>50M/35M</td>
<td>75M/75M</td>
<td>150M/150M</td>
</tr>
</tbody>
</table>

Expansion of 500M and other products and speeds.

Quantum Gateway Router – Verizon’s best delivery device
In-Home/Out-of-Home Media

Big Idea:
Take the Fios experience wherever you go on Smartphones and tablets. Versatile apps enable control and flexibility inside and outside the home.

- Watch up to 95 live channels wherever you’re connected
- Manage and schedule DVR recordings remotely
- View account details, pay bill and change services
- “Try before you buy” with Fios Preview app
Verizon Fiber Rollout

Big Idea:
Fiber is faster and easier to maintain than fiber-coax hybrid networks. Verizon will continue converting customers to 100% fiber in the coming years.

- Identify key central offices with copper circuits in service
- Secure access to upgrade to 100% FTTP infrastructure
- No cost to property
- Provide residents broader access to modern technology
Conclusion

• Markets have shifted and continue to evolve.

• Verizon’s investment in Fios has blazed the trail for how technology will be delivered in the future.

• From choice of symmetrical data speeds to Fios Custom TV, Verizon offers customers a wide variety of choice.

• With Fios mobile apps, Verizon allows customers to take content with them anywhere.

• Verizon delivers the promise of the digital world.
Questions?