

# 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



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# Connecting MDU Residents to the Content and People that Matter Most

Peter Feeney

Vice President, MDU and Connected Communities

AT&T



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# Where is AT&T GigaPower?



# **A Whole New World: *The Latest From Telecom Providers***

Vickie Rodgers

Executive Director, MDU Strategy & Operations

Cox Communications



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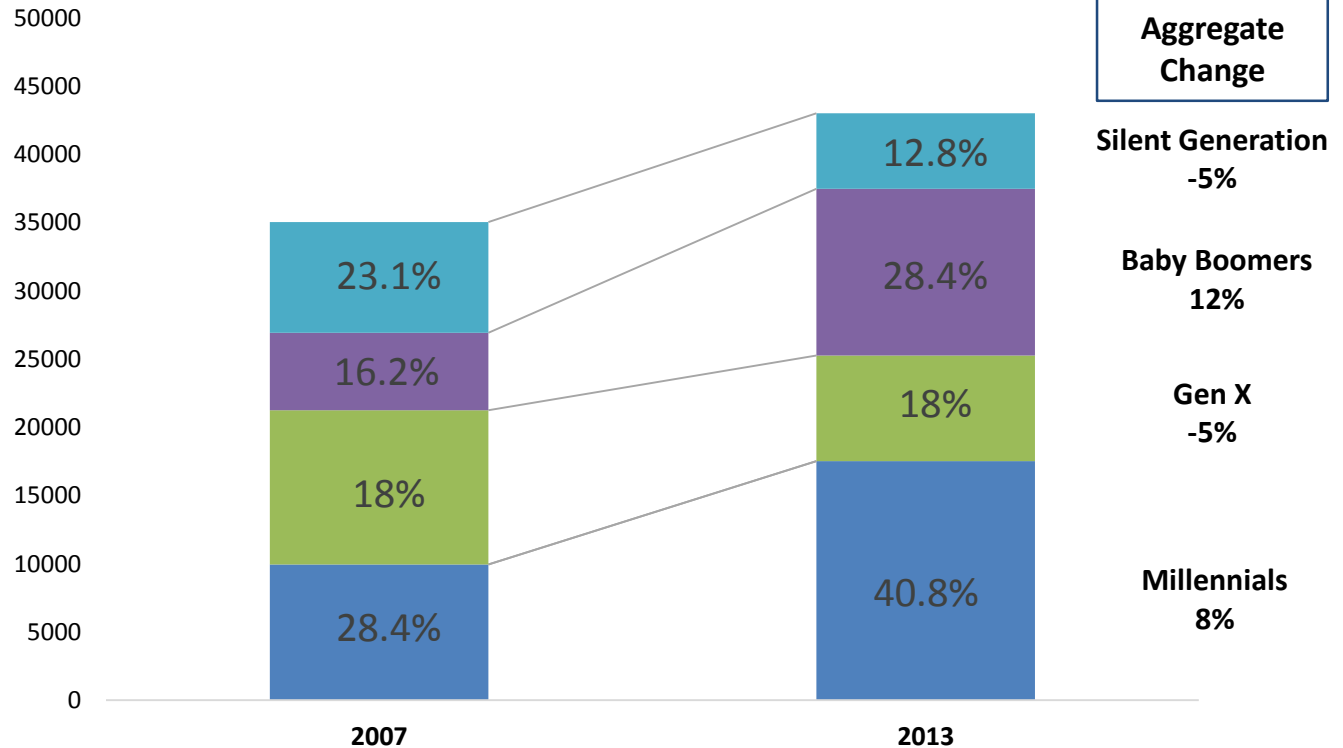
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# Who Lives in MDUs?

## MDU Households by Generation



Source: 2013 American Housing Survey, 2013 Census, Strategy Team analysis



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# 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



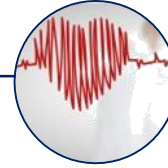
## Community Wide Wi-Fi

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*

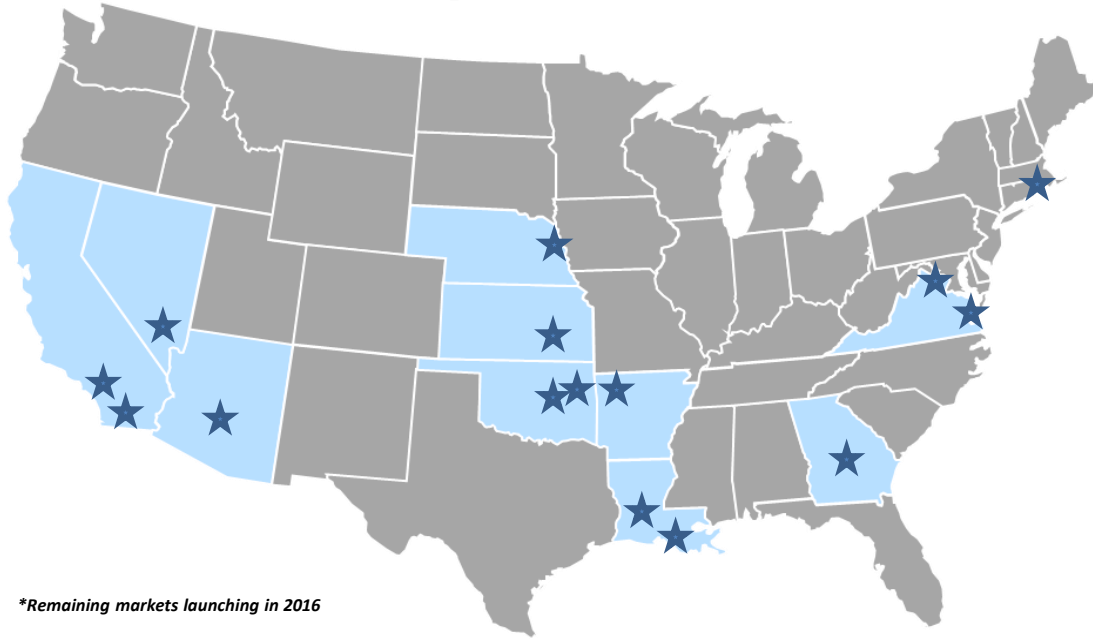


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# Delivering High Speed Access Across Cox's Footprint

**GIGABLAST**<sup>sm</sup> deployed across 15 of our 22 markets



*\*Remaining markets launching in 2016*

- 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



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# Mobilizing the Resident Experience



**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**

## 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

*\*On Future Roadmap*



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# 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



# XFINITY Communities™

Better Network. Better Entertainment. Better Service.

xfinity  
the future of awesome®

Mike Slovin – Vice President, Sales and Sales Operations

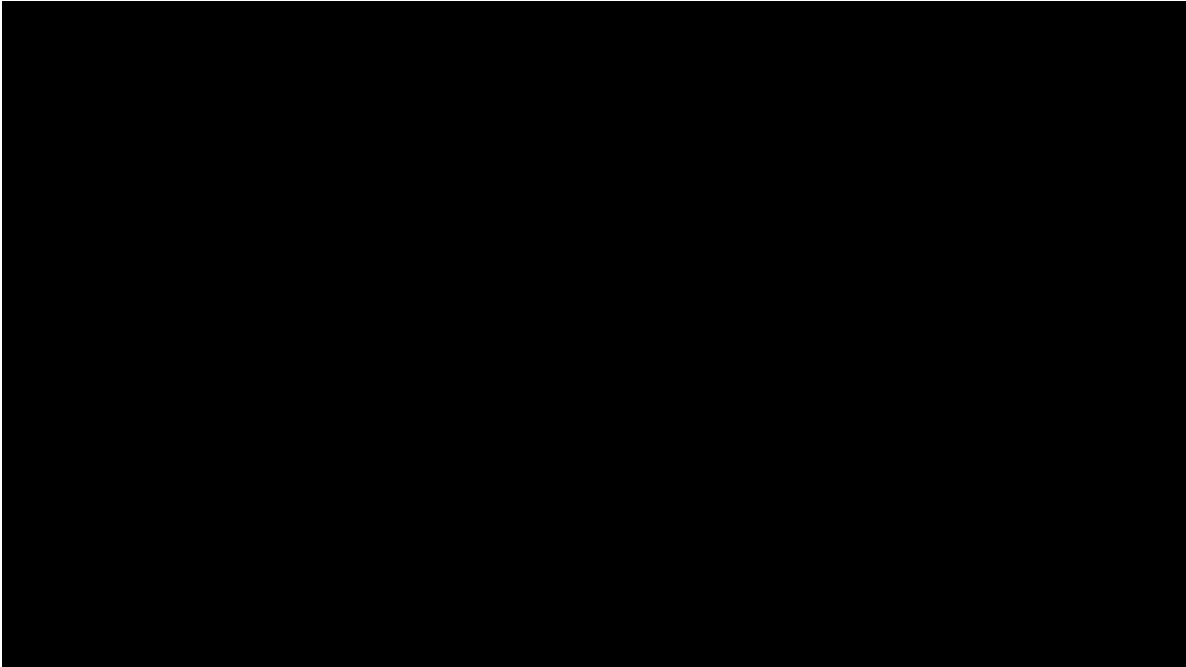


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**XFINITY** Communities™

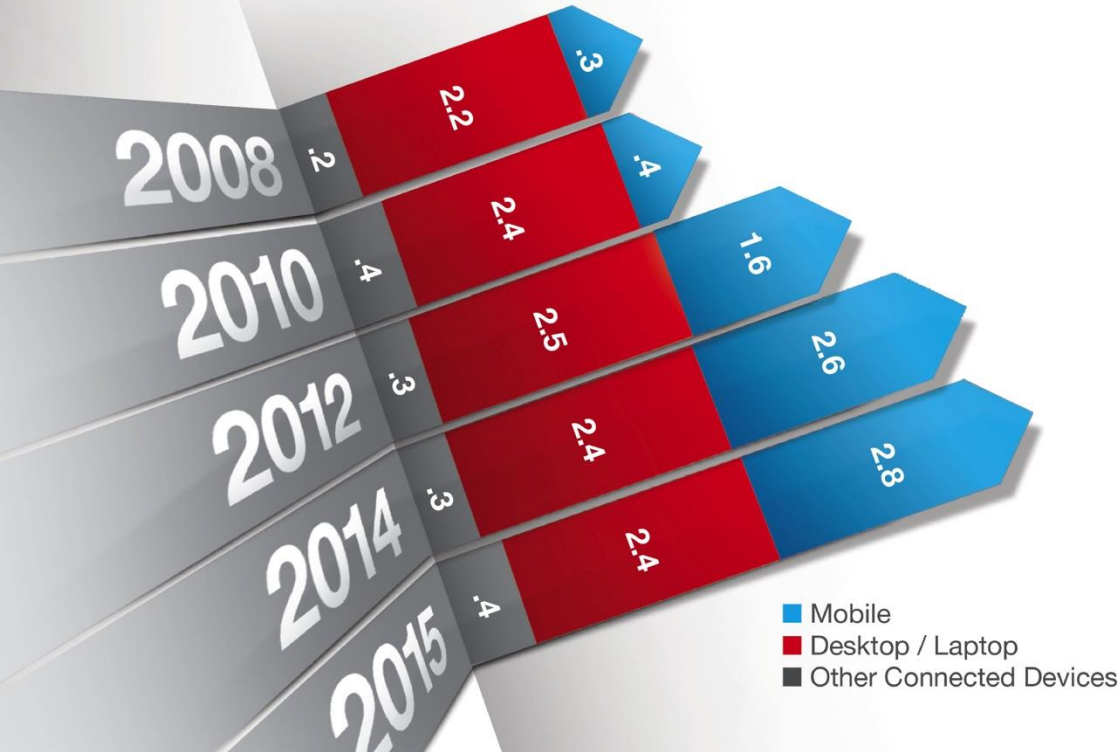
Better Network. Better Entertainment. Better Service.



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## Data trends: Mobile devices at home and on the go.



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

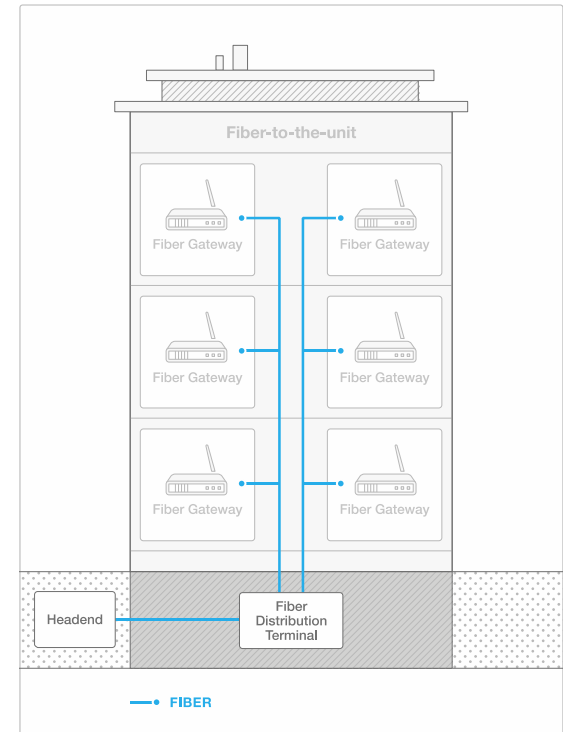
- Mobile usage increased to 3 hours per day vs. 20 minutes in 2008.
- Residents are consuming more content in more places.
- Multiple-device usage at home continues to increase exponentially.
- Consumers expect faster speeds and more Wi-Fi hotspots.



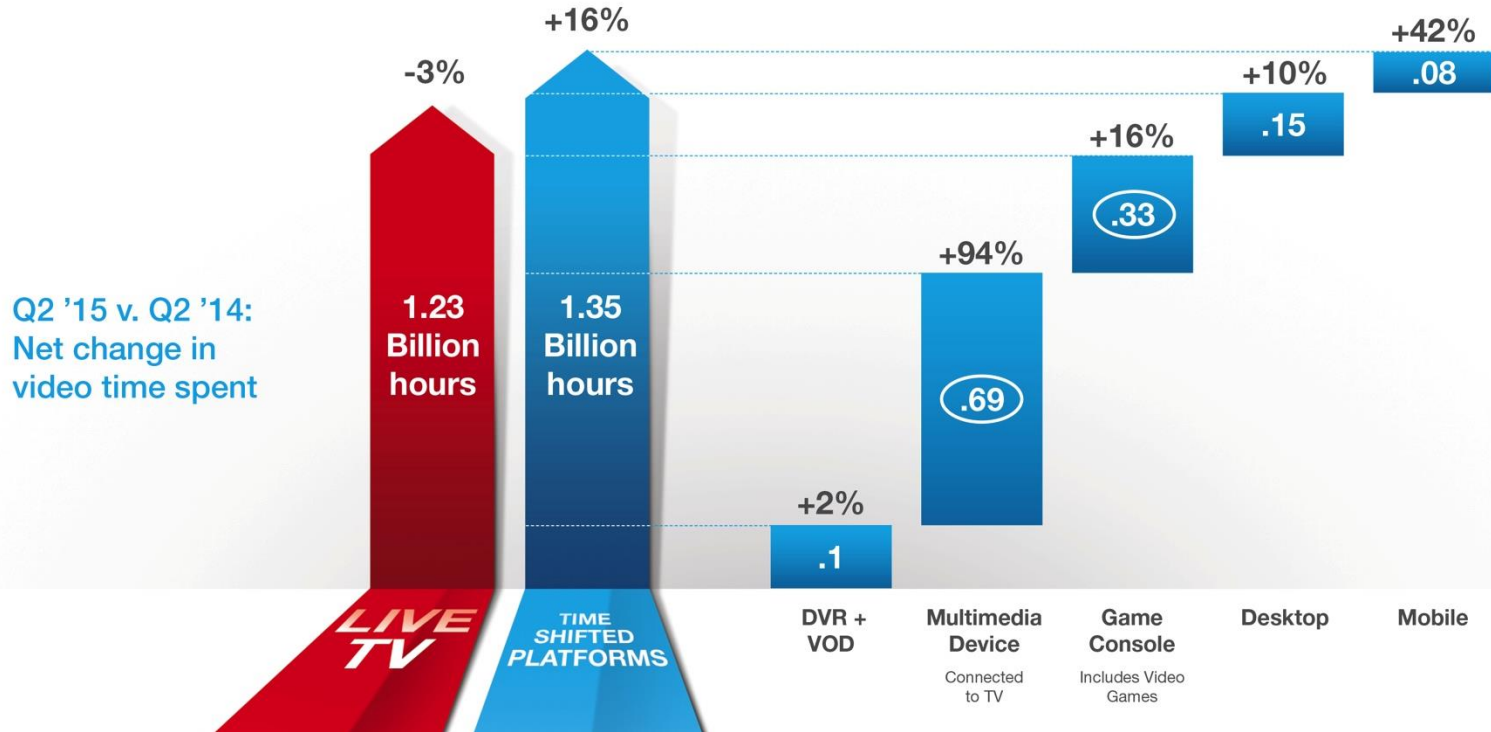
# Better Network: The path to gigabit speeds.

- 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](http://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





# 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

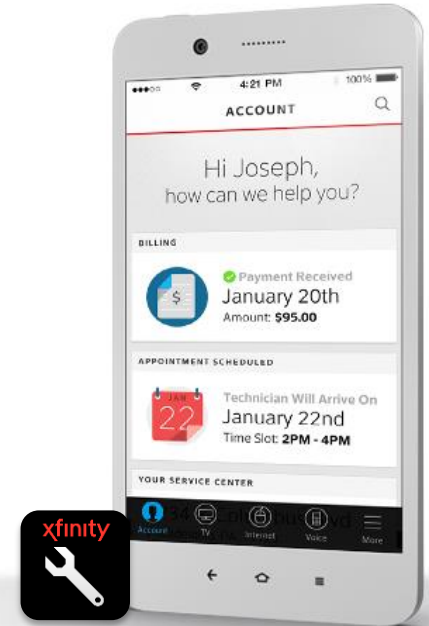
## Empty nester:

- Share app
- Talking guide



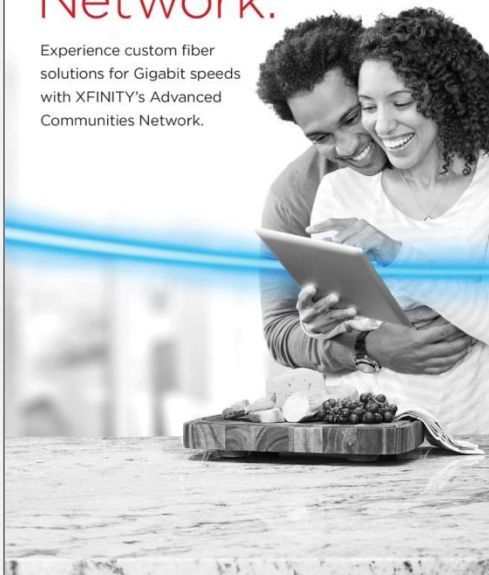
# Better Service: We're creating a customer-first culture, top to bottom.

- 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.



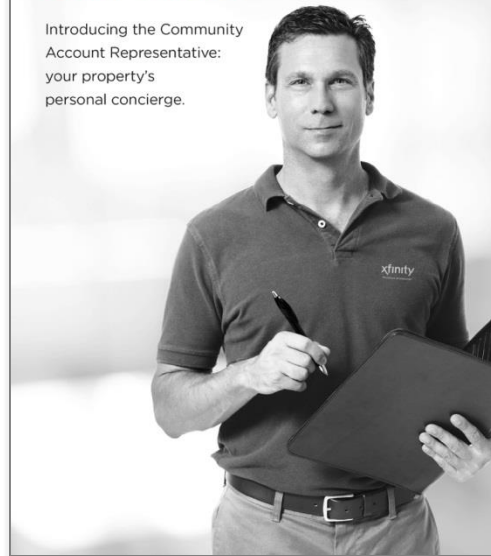
## Better Entertainment.

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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# A Whole New World: The Latest from Telecom Providers

Chris Curtin

Verizon Enhanced Communities

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# 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

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Better Matters



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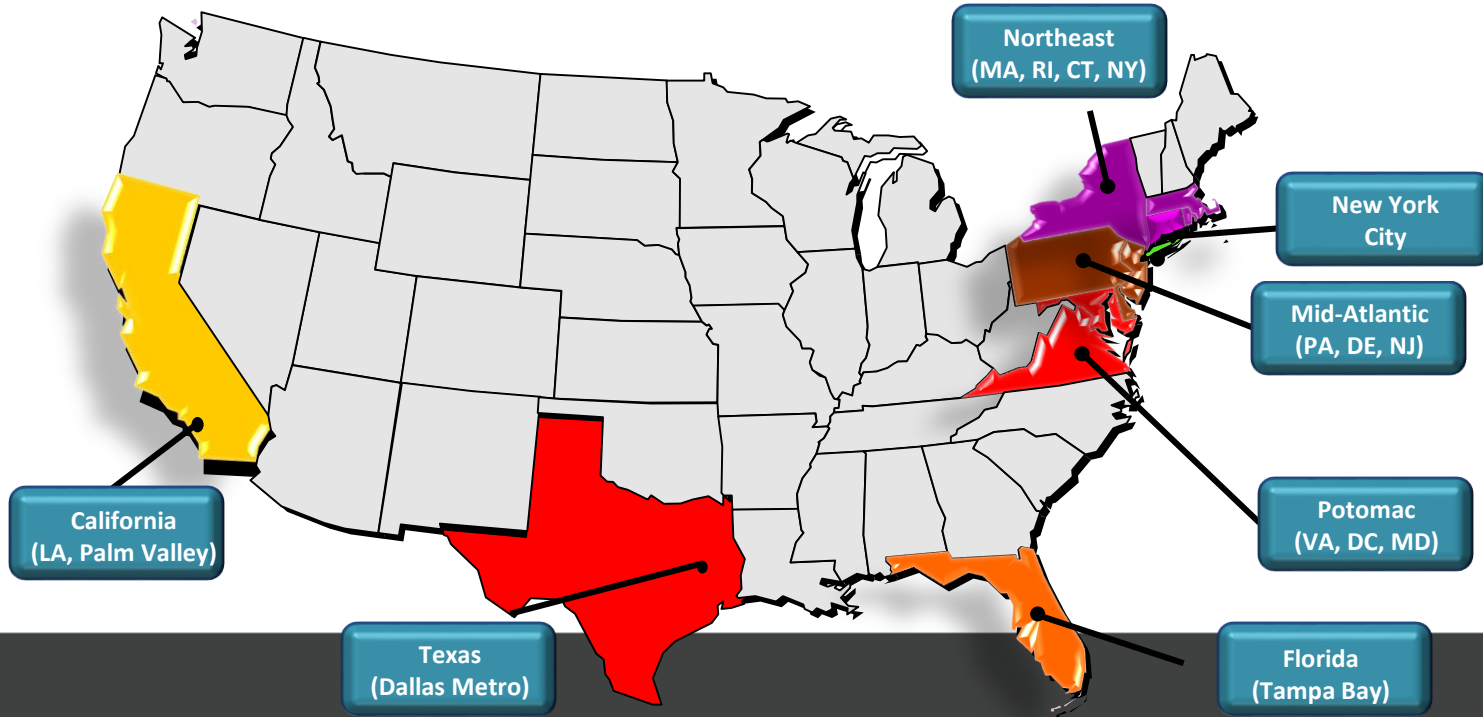
# Verizon Fios Coverage Map



## 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)**



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# The New Demand: Millennials Shaping the Market



## Big Idea:

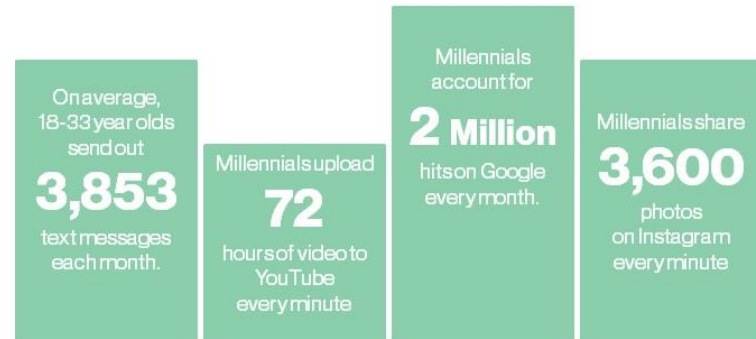
By 2020, Millennials will make up over 50% of the US workforce\*

## 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\*\*



## Millennials by the Numbers



[https://www.accenture.com/t20150522To61610\\_w\\_/us-en/\\_acnmedia/Accenture/Conversion-Assets/Outlook/Documents/1/Accenture-Outlook-Who-Are-Millennial-Shoppers-What-Do-They-Want-Retail.pdf#zoom=50](https://www.accenture.com/t20150522To61610_w_/us-en/_acnmedia/Accenture/Conversion-Assets/Outlook/Documents/1/Accenture-Outlook-Who-Are-Millennial-Shoppers-What-Do-They-Want-Retail.pdf#zoom=50)

\*\*<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.**

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



**Lifestyle (18 channels)**  
Bravo, History, A&E, TLC and more

**Entertainment (10 channels)**  
TBS, USA, SyFy and more

**News & Info (15 channels)**  
HLN, Science, C-SPAN and more

**Pop Culture (14 channels)**  
CMT, E!, IFC and more

**Kids (12 channels)**  
Disney, TV Land, Nick and more

**Sports (up to 13 channels)**  
ESPN, Big Ten ESPN U and more

**Sports Plus\*\* (up to 9 channels)**  
Regional, NFL, Golf and more

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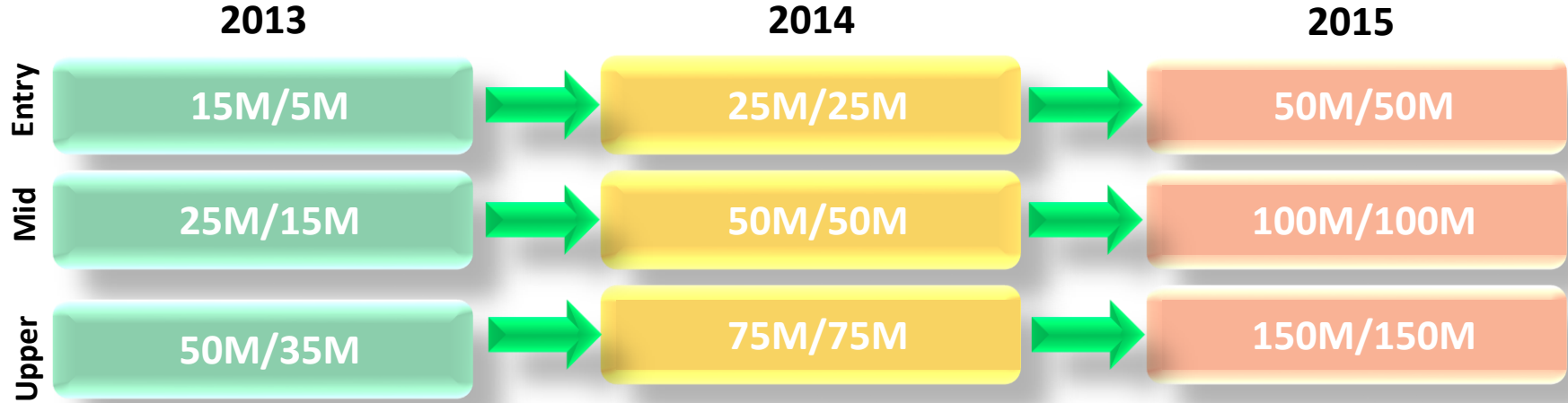
# Fios Broadband Roadmap



## Big Idea:

Symmetrical broadband speeds adapt ahead of customer demand.

**Speeds that were once considered top tier are now entry level.**



Expansion of 500M and other products and speeds.

**Quantum Gateway Router** – Verizon’s best delivery device



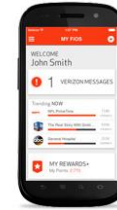
# In-Home/Out-of-Home Media



## 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

**FiOS**  
Preview

**verizon**✓



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# 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

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# 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?



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