

L.A. CONSOLIDATION

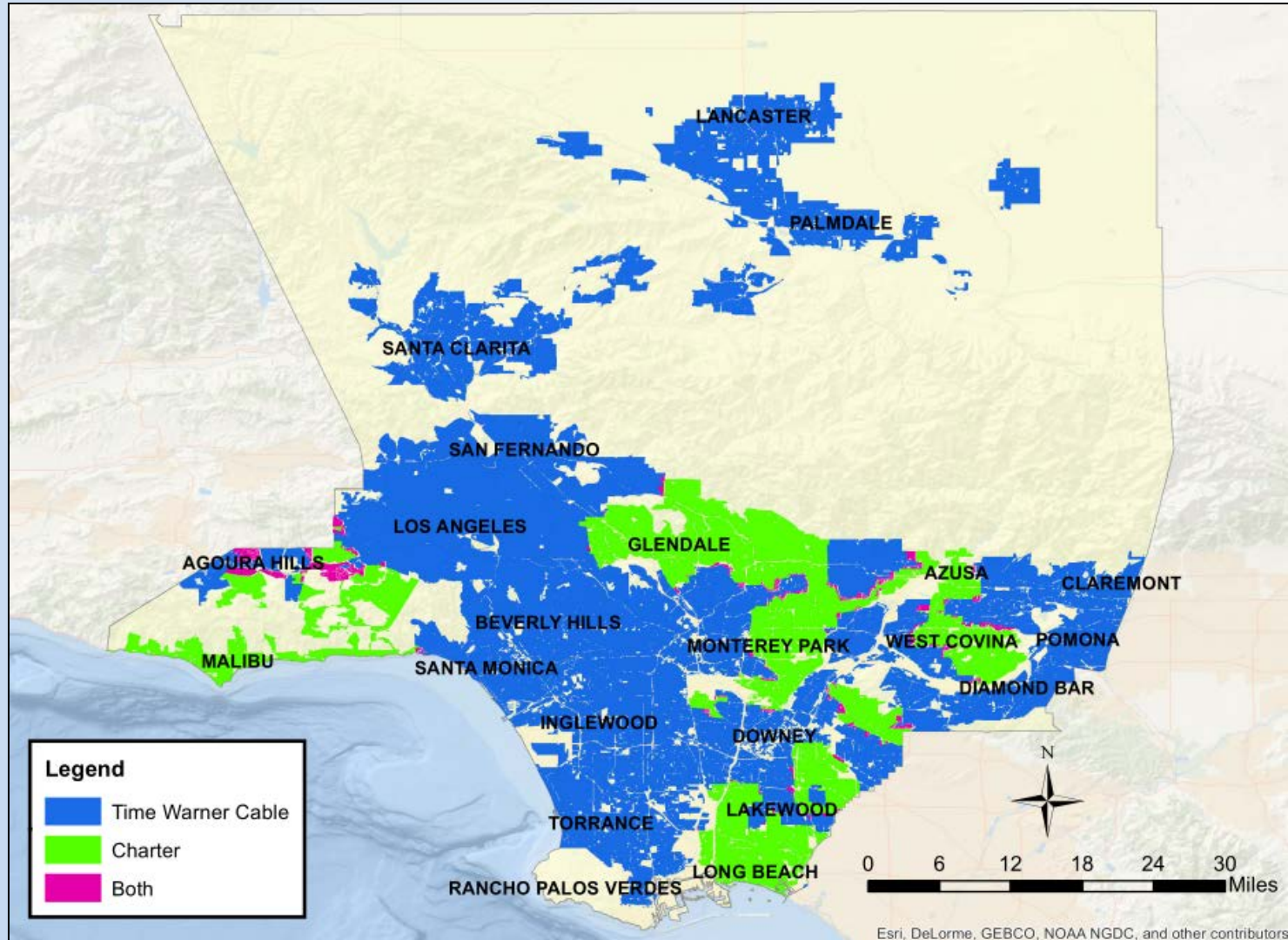
THE EFFECTS OF THE COMCAST-TIME WARNER CABLE MERGER IN LOS ANGELES

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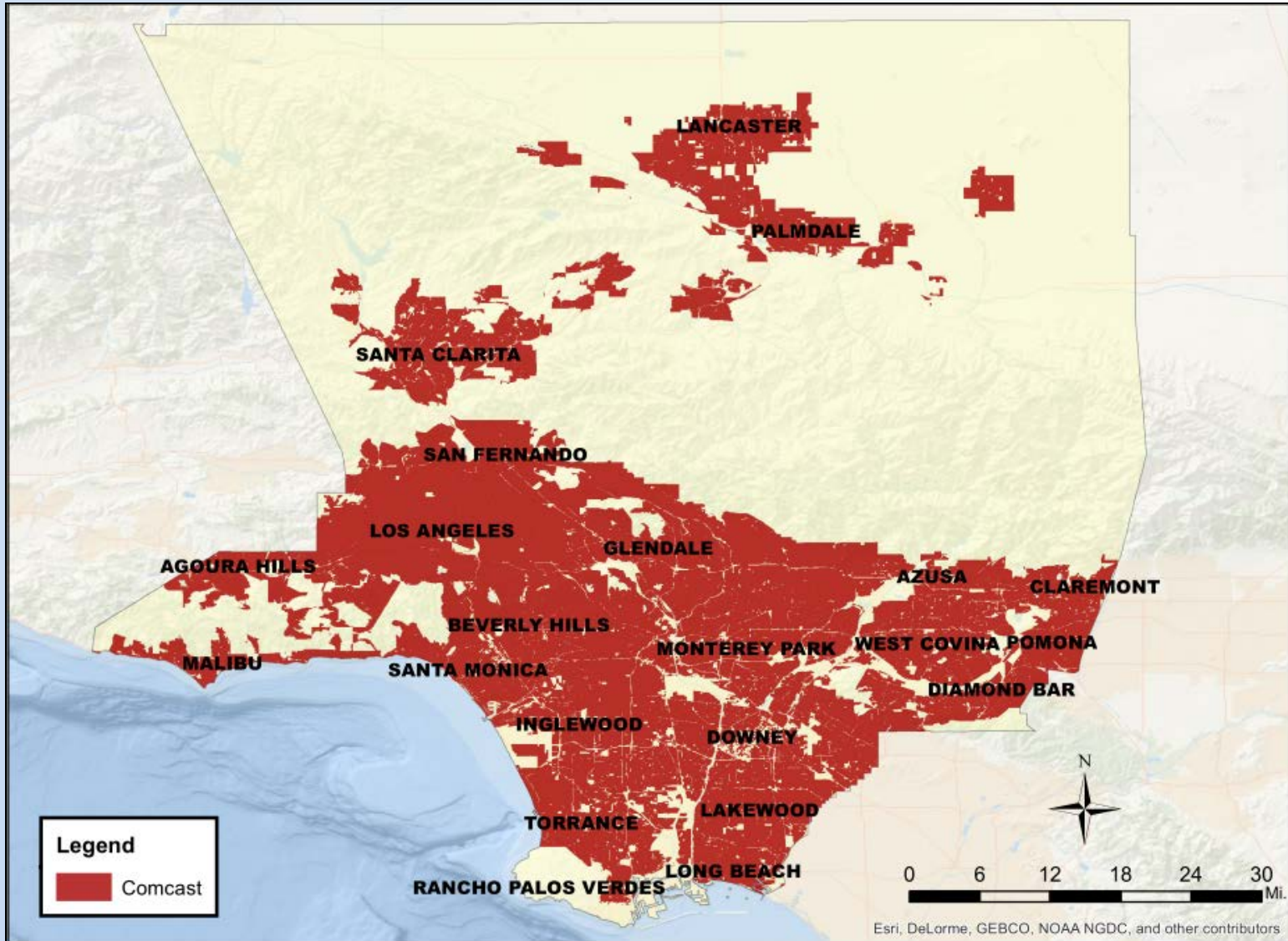
 Public Knowledge



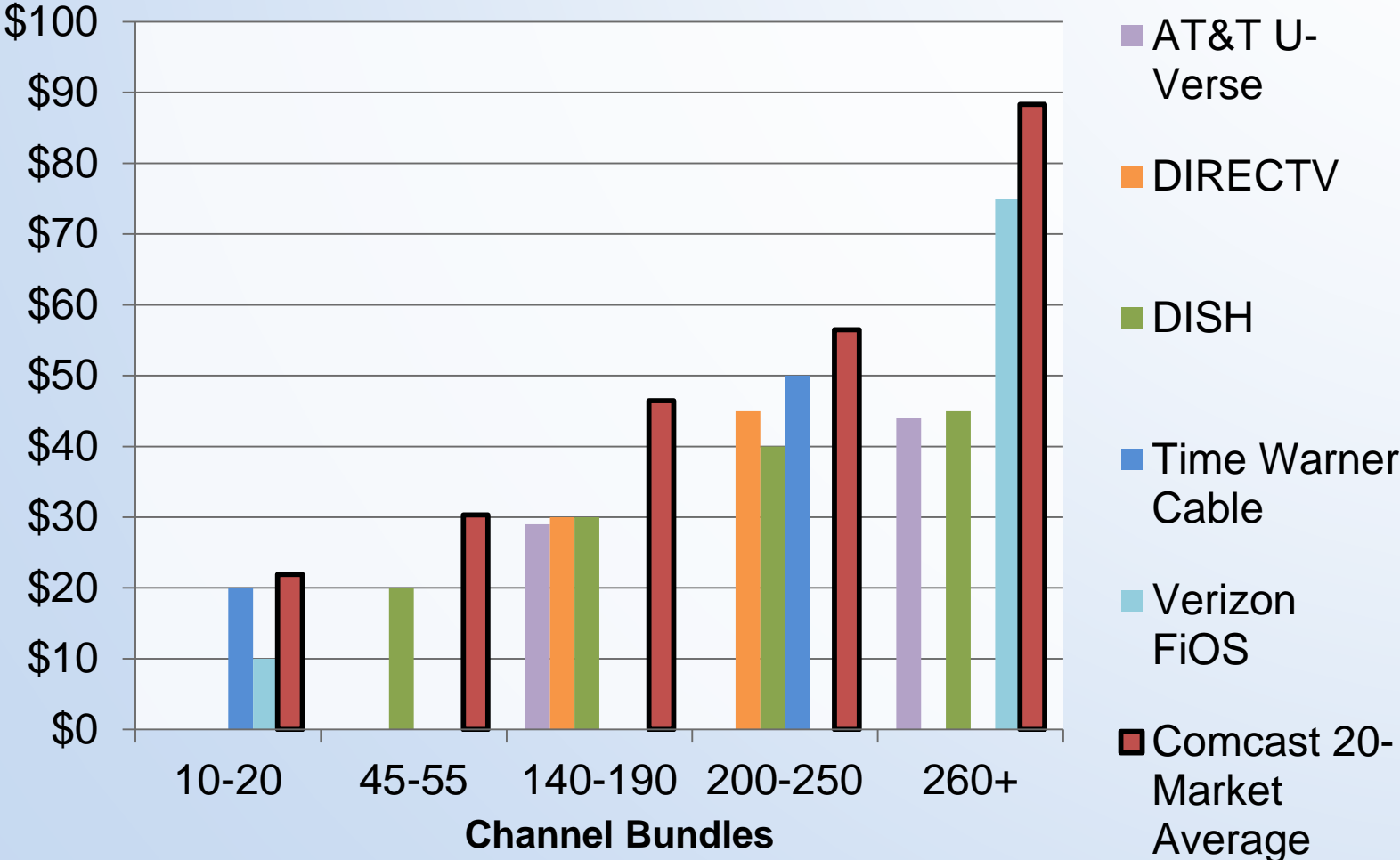
TWC & CHARTER FOOTPRINTS LOS ANGELES COUNTY



COMCAST'S PROPOSED FOOTPRINT LOS ANGELES COUNTY



COMCAST'S CABLE SERVICE: CONSISTENTLY MORE EXPENSIVE THAN COMPETITION

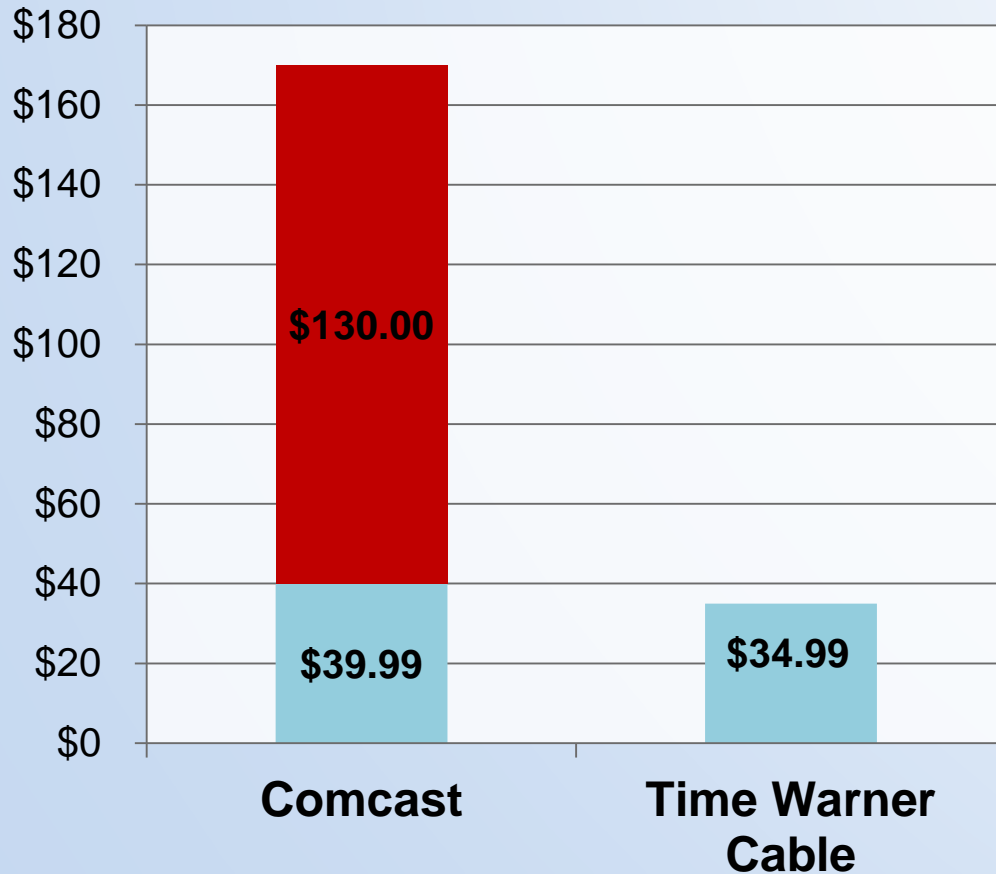


COMCAST'S BROADBAND SERVICE: MORE EXPENSIVE ACROSS SEVERAL PACKAGES

Standalone Broadband		
Speed	Comcast	TWC
3 Mbps	\$39.95	\$14.99
6/10 Mbps	\$29.99	\$29.99
50 Mbps	\$39.99	\$34.99
105/100 Mbps	\$44.99	\$44.99
150/200 Mbps	\$114.95	\$54.99

COMCAST'S ANTI-CONSUMER PRACTICES

Cost of Broadband for Cord-Cutters

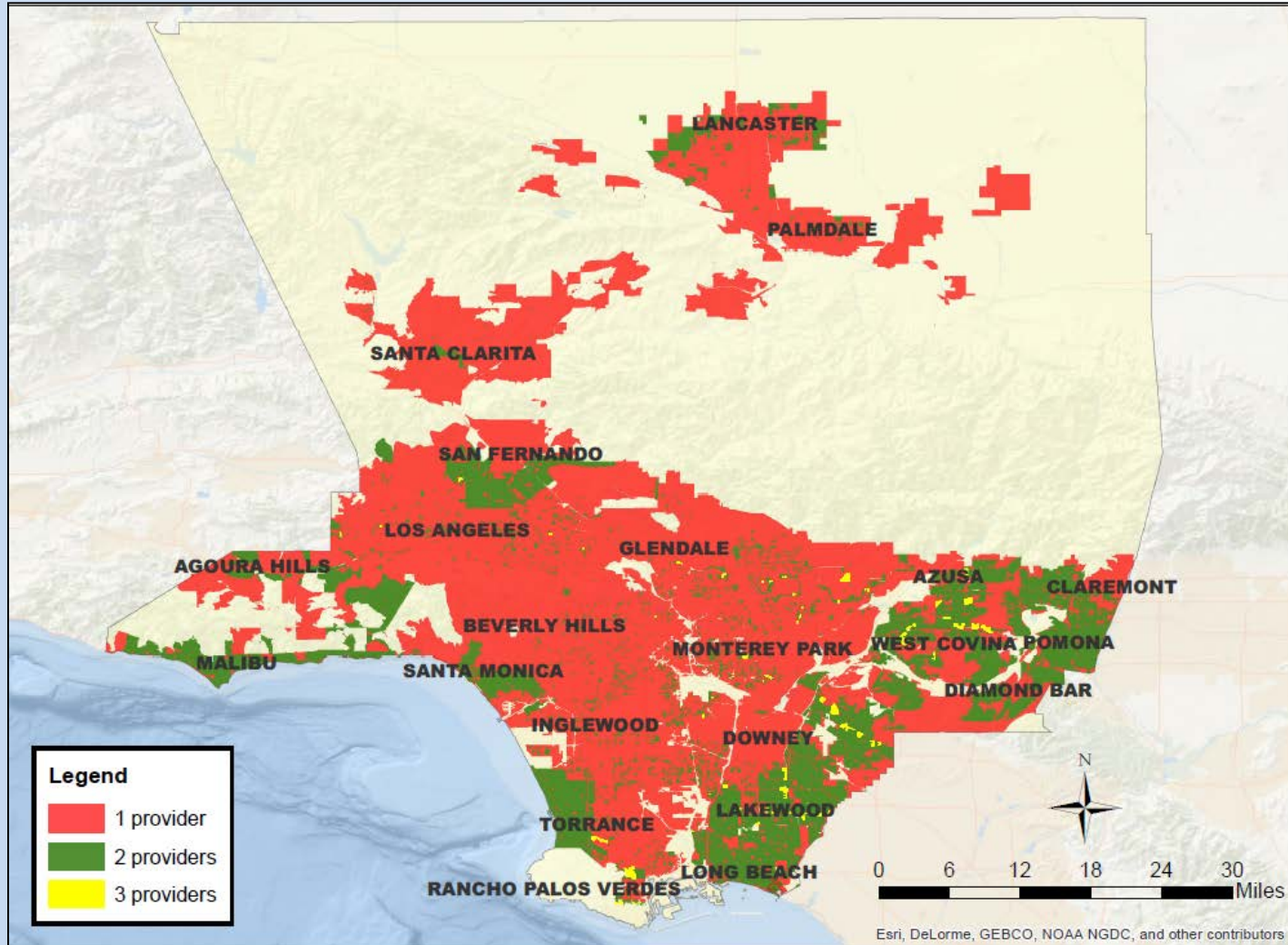


- Additional cost to substitute streaming video for average US traditional TV viewing
- 50 Mbps connection

- Data Caps
 - Significantly Increase the Cost of Online Video
- Restrictive Authentication Policies
 - Limits how Consumers can Watch Video Content

LITTLE COMPETITION IN COMCAST'S PROPOSED FOOTPRINT

PROVIDERS OFFERING 25MBPS+ INTERNET SERVICE




- 72% of the population is served by only 1 provider
- 28% of the population is served by 2 providers

COMCAST: WORSE CUSTOMER SERVICE

- 
- Voted “**Worst Company in America**” by Consumerist readers in 2014

- 
- Disclosed 74,000 Californians’ unlisted numbers over 2 years

- 
- Reported twice as many escalated complaints about broadband service in California than TWC reported for all services

LOW AND FIXED INCOME CONSUMERS: COULD LOSE AFFORDABLE OPTIONS

TWC

Affordable Broadband

3 Mbps for \$14.99 per month

No Eligibility Restrictions

Comcast

Internet Essentials Program

6 Mbps for \$9.95 per month

Strict Eligibility, Low Adoption
Only 11% enrollment in CA

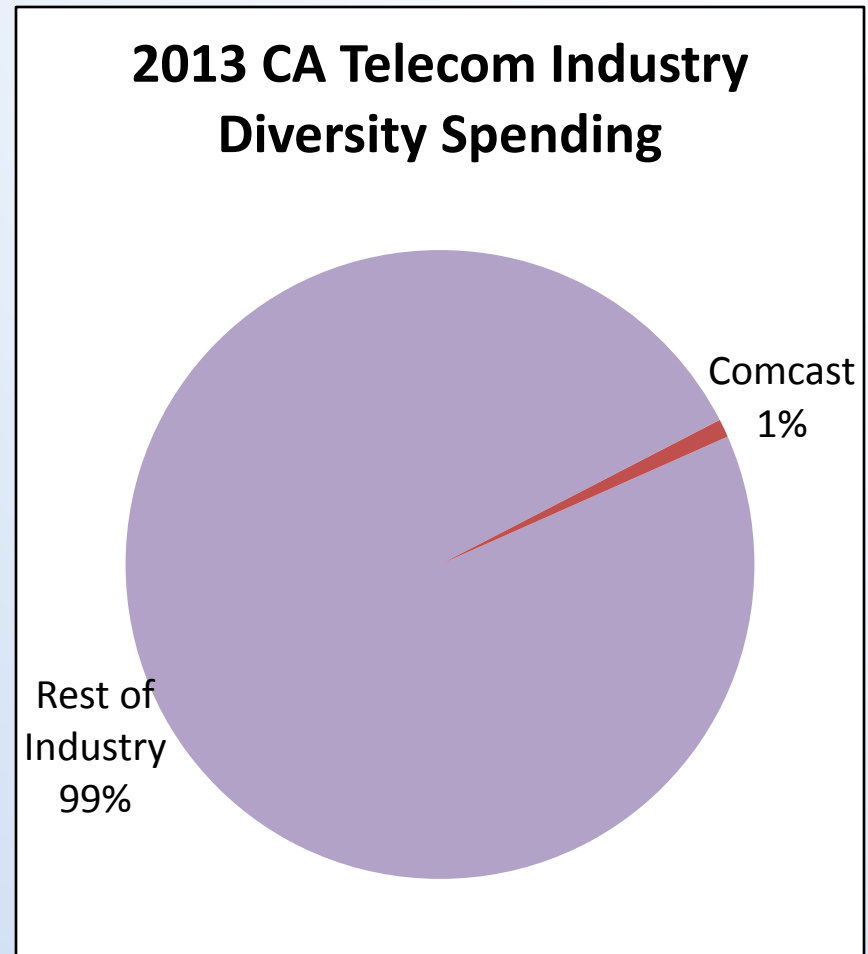
DIVERSE COMMUNITIES: DISPROPORTIONATELY AFFECTED

Minimal Supplier Diversity

- In 2013, the CA telecom industry spent \$2.6 billion on minority business enterprises; Comcast spent only \$24 million

Fewer Alternatives to Comcast's High Prices

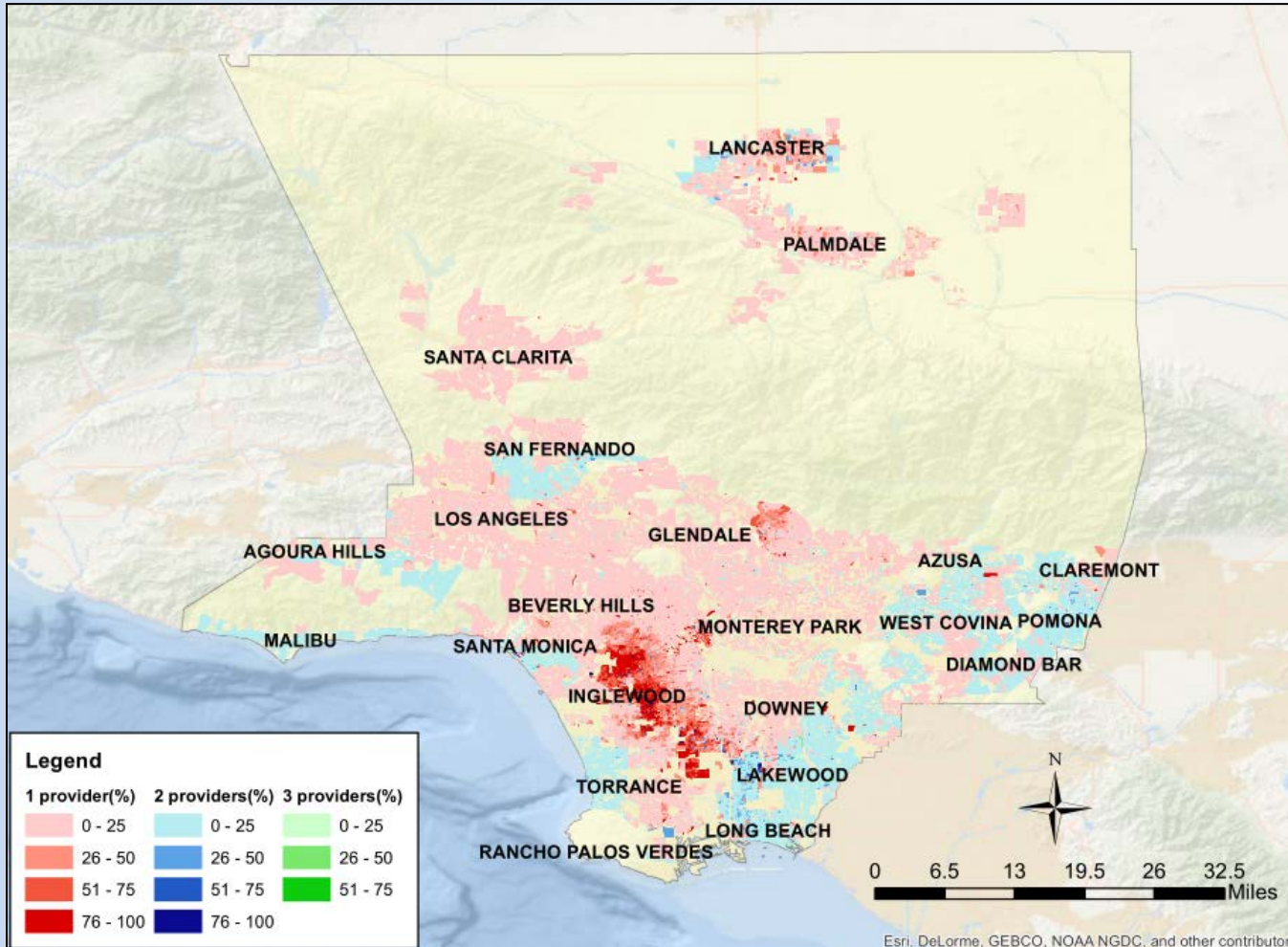
- Disproportionately fewer choices for high-speed broadband



COMCAST'S PROPOSED FOOTPRINT

AFRICAN AMERICAN POPULATION

PROVIDERS OFFERING 25 MBPS+ INTERNET SERVICE

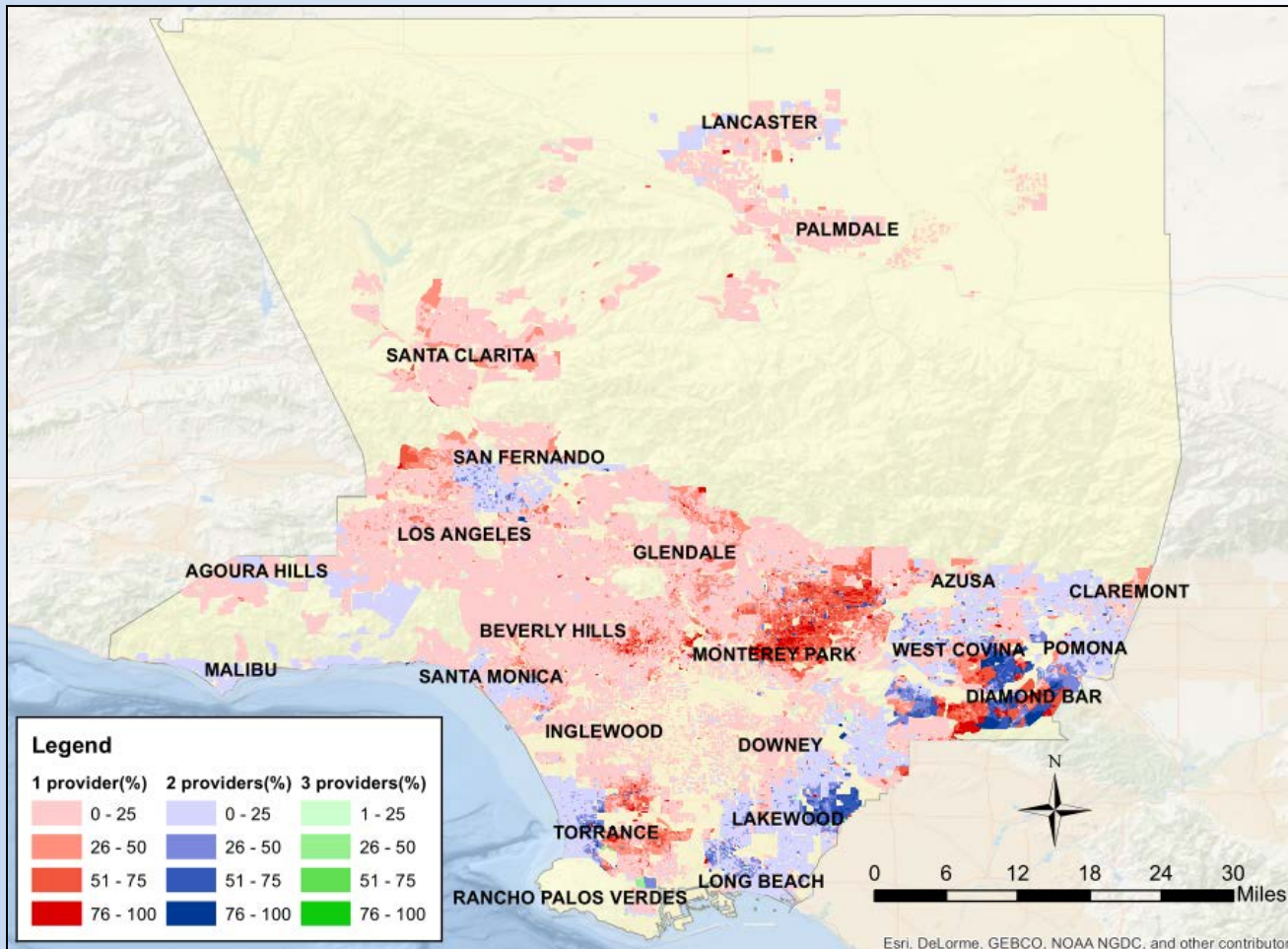


African-Americans

- 78% served only by Comcast

COMCAST'S PROPOSED FOOTPRINT ASIAN POPULATION

PROVIDERS OFFERING 25 MBPS+ INTERNET SERVICE



Asian Residents

- 73% served only by Comcast

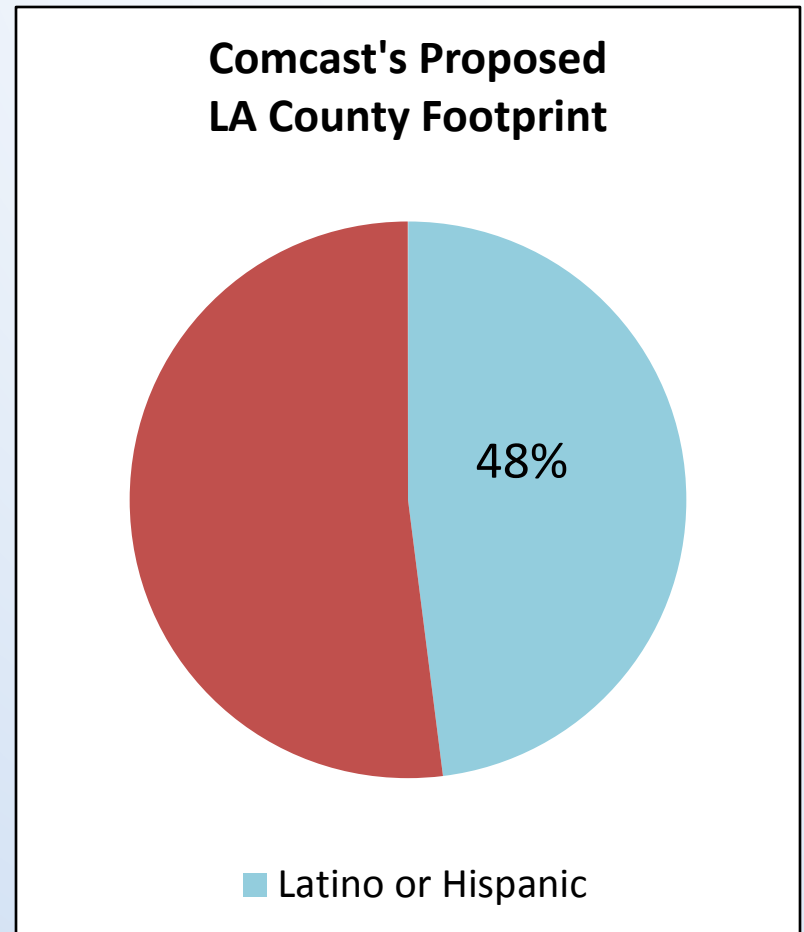
COMCAST'S CONTROL OVER LATINOS

Comcast To Become Gatekeeper to Latino Audience

- Comcast would become the dominant cable provider for 90% of Latinos in the U.S.
- Comcast would reach 98% of Latinos in the County

Comcast's Higher Prices Affect Latinos

- Median income for Latino or Hispanic residents is \$21,314 compared to \$44,929 for white residents



COMCAST'S CONTROL OVER LATINO CONTENT

Make or Break Power over Latino Programmers

- Refuse carriage
- Cut fees
- Place channel in higher tiers



Incentive and Ability to Favor Affiliated Networks

- Owns several Latino-oriented channels
- Incentive to limit competition



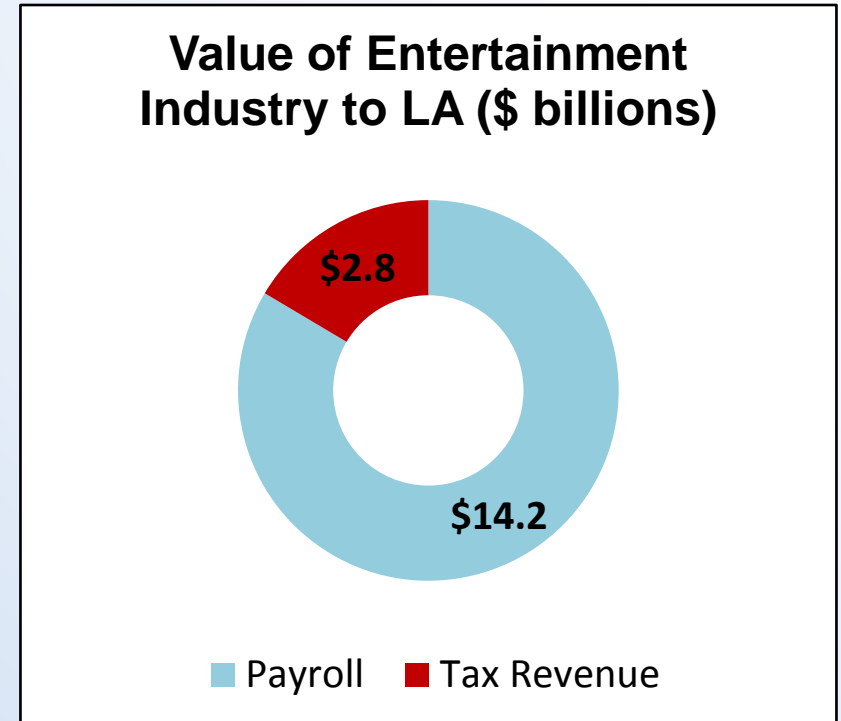
LOCAL SPORTS FANS WILL SUFFER



- TWC and Comcast have history of using regional sports to harm competition and drive up prices
- TWC's SportsNetLA is one of the most expensive RSNs in the country
- High prices mean 70% of local pay TV subscribers do not have access to the Dodgers channel
- Acquisition of both Charter and TWC likely means less access and higher prices for Dodgers channel

COMCAST'S EXPANDED CONTROL THREATENS CREATIVE COMMUNITY

- Cuts to content fees will lead to:
 - Less creativity
 - Less innovation
 - Less content
- Increased control of Internet will stifle online video growth
 - Comcast could limit new competition and diverse viewpoints
- Merger could harm local jobs
 - Online video growth has driven industry employment to highest level in a decade with online series filming locally



THANK YOU

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 Public Knowledge

