

November 21, 2017

Ex Parte

Ms. Marlene H. Dortch
Secretary
Federal Communications Commission
445 12th Street SW
Washington, D.C. 20554

Re: Restoring Internet Freedom, WC Docket No. 17-108

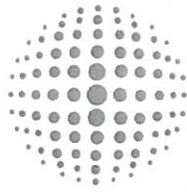
On Monday, November 20, 2017, Pat Brogan and I (USTelecom) met with Kris Monteith, Dan Kahn, Lisa Salons, Madeline Findley, Joseph Calascione (WCB) and Jerry Ellig (OSP). We discussed the attached slides in the context of the pending rulemaking cited above. We highlighted recent declines in broadband investment and much lower levels of investment in Europe. We also discussed the consumer survey USTelecom conducted with NCTA and filed in this docket on August 28, 2017, focusing on consumer expectations of their ISPs and their usage of ISP services. Finally, we discussed the importance of continuing to have a single, federal framework for investment in and delivery of broadband internet access services.

This letter is being filed electronically in accordance with Section 1.1206 of the Commission's rules. Please contact me if you have any questions.

Sincerely,

Jon Banks





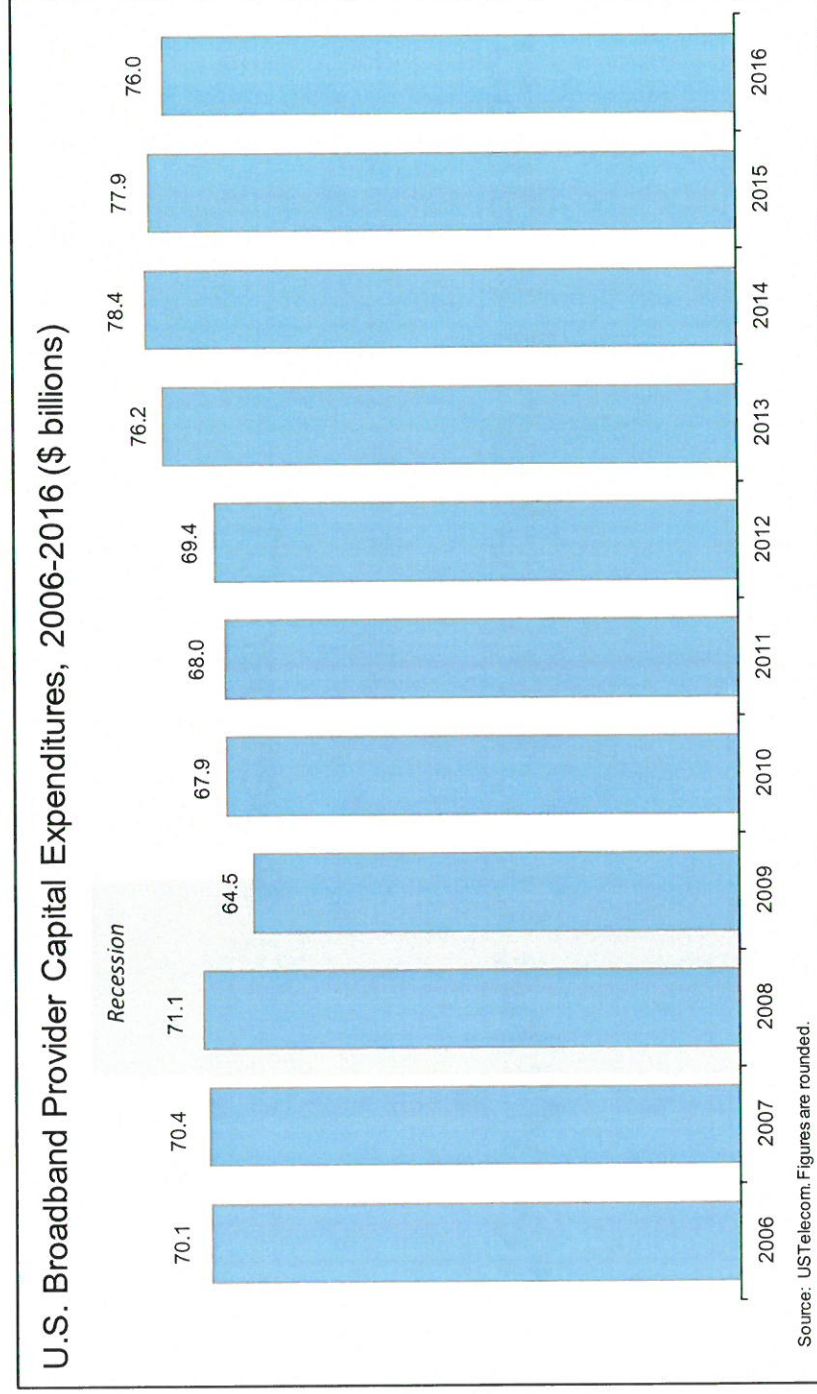
USTELECOM
THE BROADBAND ASSOCIATION

We are Broadband.

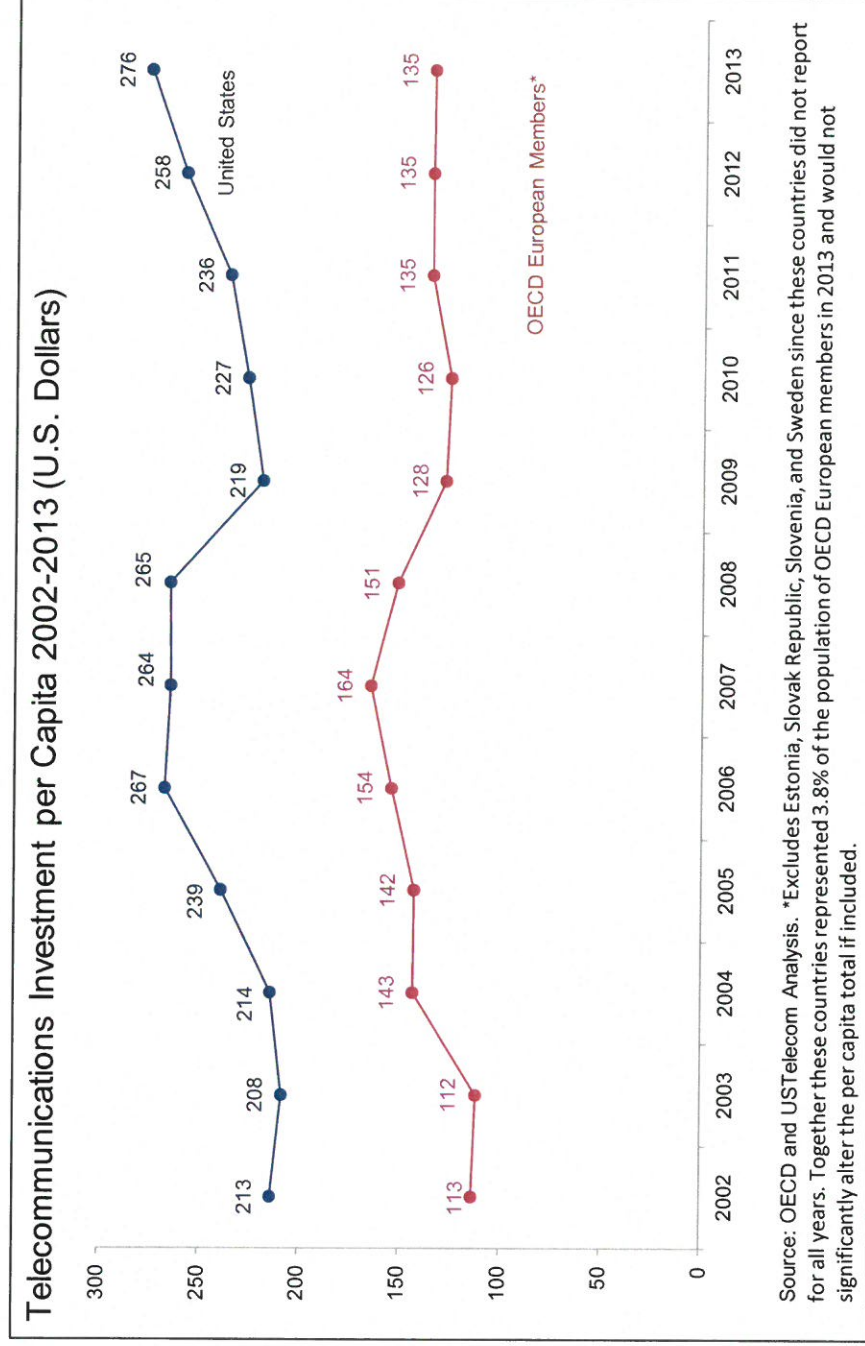
State of the U.S. Broadband Industry

November 2017

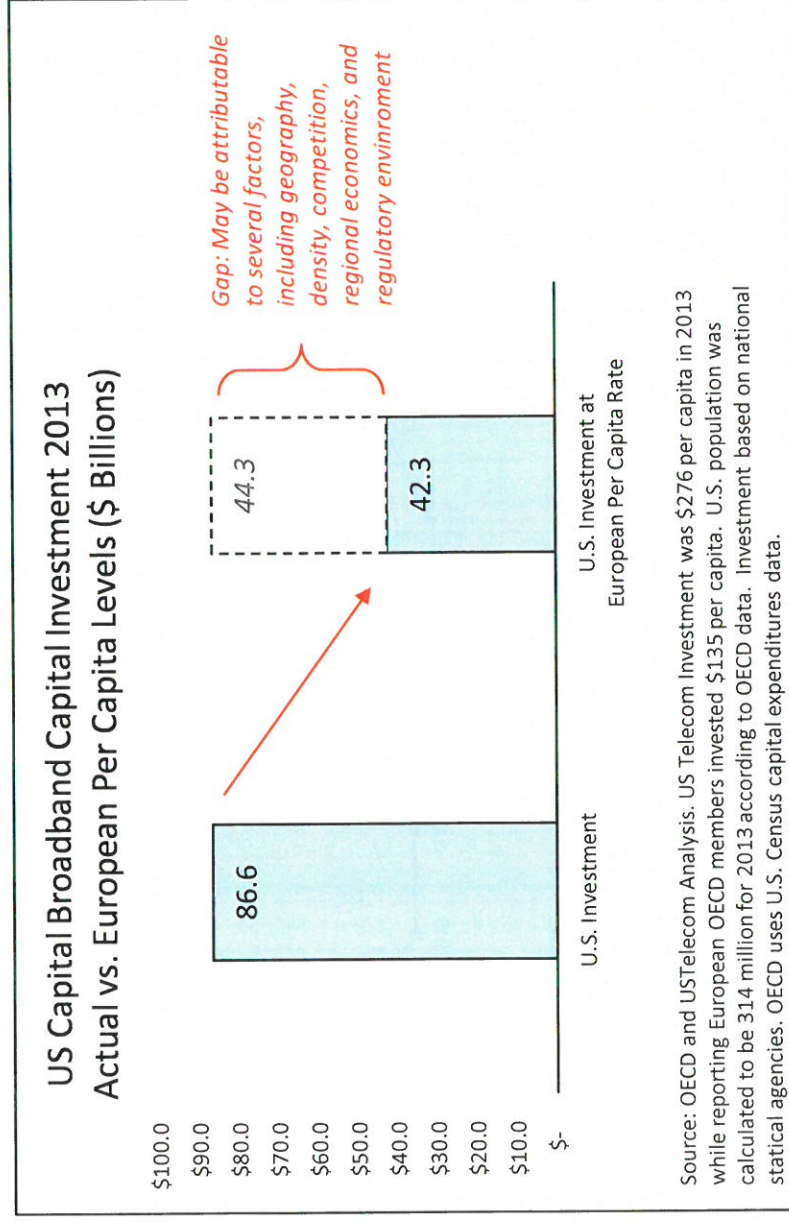
Annual Broadband Provider Investment Start to Decline in 2015



Broadband Investment in Utility-Regulated Europe Is Less than in the U.S.



European Style Regulation Could Dampen U.S. Broadband Investment

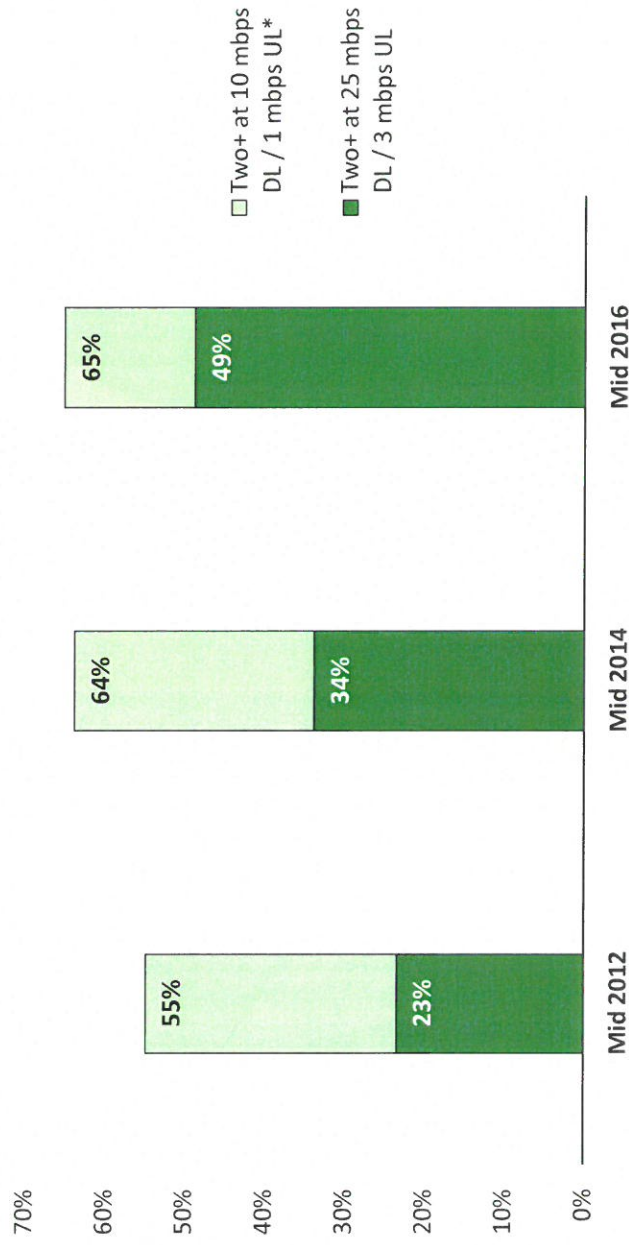


Competitive Availability Is Growing Rapidly at Higher Speeds

U.S. Broadband Competition: Services Deployed Widely and Speeds Growing Rapidly

(% of U.S. Housing Units with Two or More Wired Broadband Options Available at Selected Speed Tiers, Mid 2012 to Mid 2016)

Two or more wired broadband providers are available to 84 percent of Americans and at least one option is available to 96 percent. Competition occurs dynamically over time as providers upgrade network speed and quality. In addition to wired options from telecom, cable, and others, multiple satellite and wireless options are available to nearly all Americans.

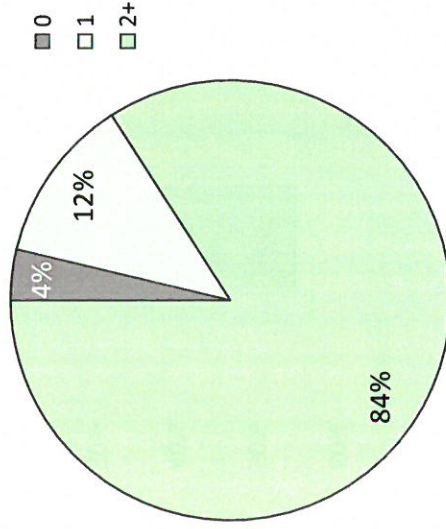


Sources: FCC, NTIA, USTelecom, and Telcodata CensusNBM.com.

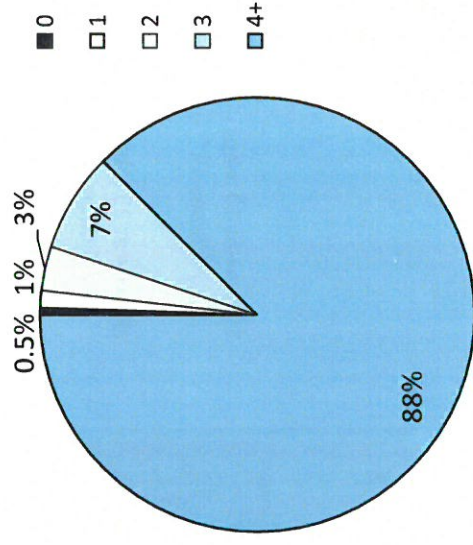
*10 megabit per second download / 1 megabit per second upload estimated for 2012 and 2014 based on 10m download / 768 kilobit upload

Competitive Broadband Infrastructure Is Widely Deployed

U.S. Wired Broadband Choices Available at Any Speed
(% of Housing Units, Mid 2016)



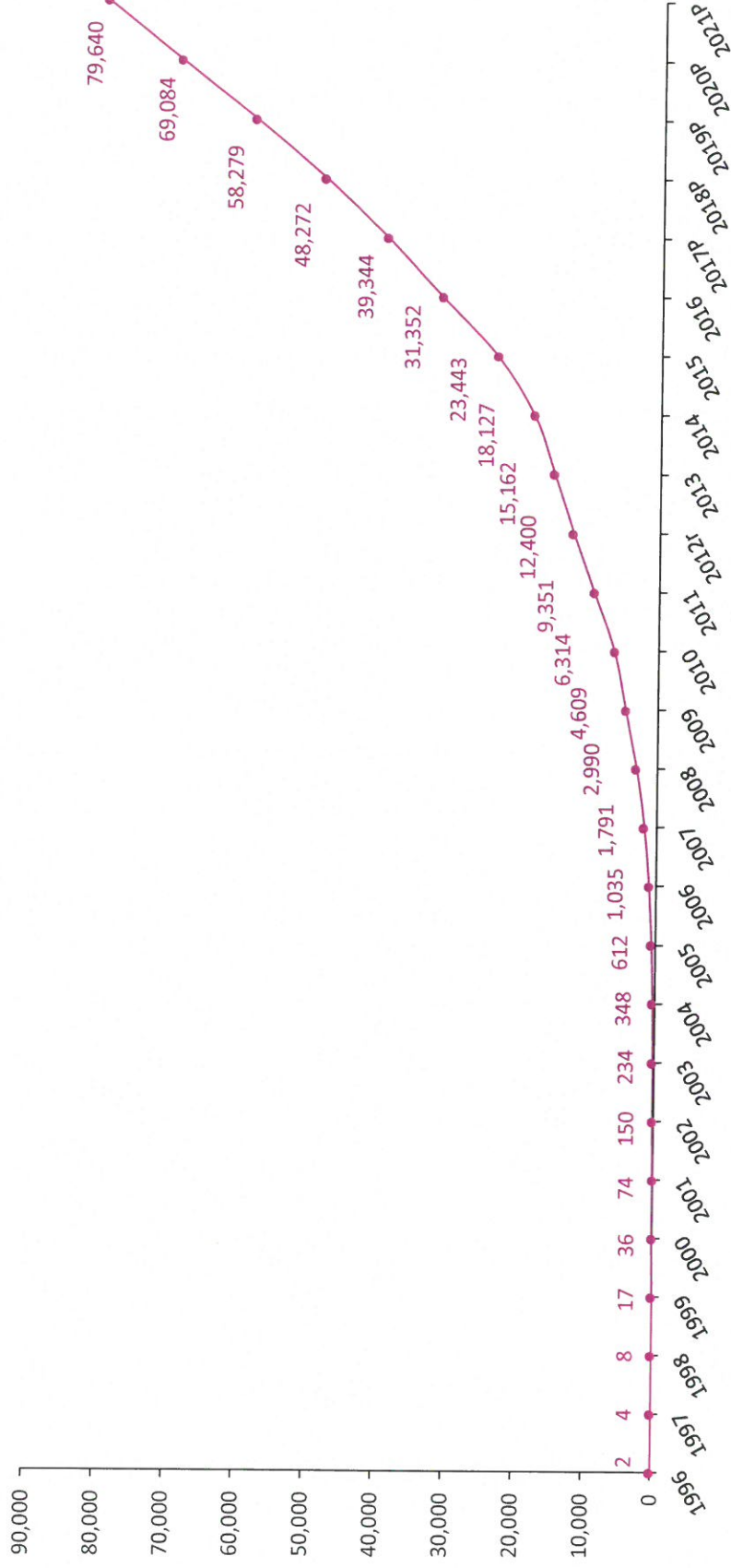
U.S. Wireless LTE Broadband Choices Available
(% of Housing Units, 2015)



Source: FCC, USTelecom, and Telcodata CensusNBM.com.

U.S. Internet Traffic Is Projected to Continue Growing Rapidly

Estimated U.S. Internet Protocol Traffic, 1996-2021 (Petabytes per Month)



Source: Cisco Visual Networking Index and USTelecom Analysis. DVD equivalents are annualized, rounded, and assumed to store a two-hour movie. The 2012 figure is revised from previously reported volumes based on Cisco VNI statements and is a rounded estimate.

Key Findings from USTelecom and NCTA July 2017 Consumer Survey

Valued Internet Capabilities

A substantial majority of survey respondents indicated that they expect their broadband internet access service to provide the capabilities to acquire, utilize, retrieve, process, generate, store, make available, and transform information.

In addition, these five attributes of broadband internet access service are considered "very important" (must-have) by at least 8 in 10 consumers:

- The ability to search for and find information
- The ability to send and receive emails
- The ability to surf the internet
- The reliability of internet connection
- The speed of internet connection

Awareness of Features Offered by Internet Service Providers (ISPs)

- Almost all consumers (88%) indicated that their ISP provides the ability to access a specific website on the internet by entering a simple website name or address into a web browser.
- A large majority (84%) of consumers indicated that their ISP offers email services.
- Online storage (59%) and virus protection (58%) are the next most common features consumers said are offered by their ISPs.

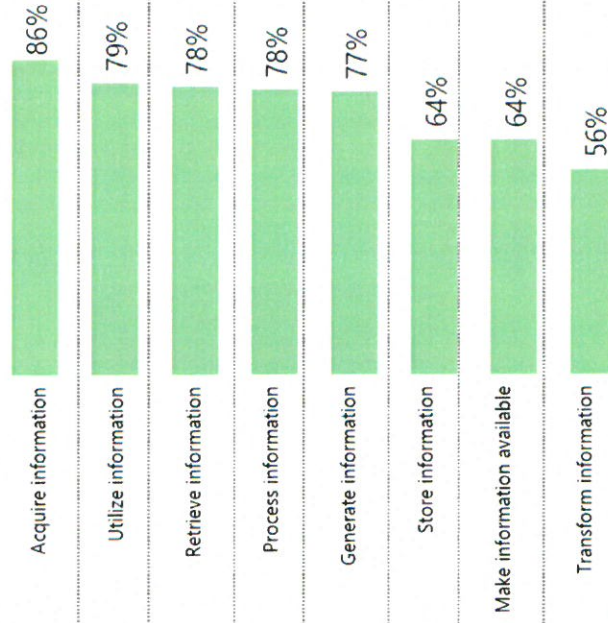
ISP-Offered Features Used by Consumers

- Apart from the feature that makes it easier to access a specific website on the internet, email is the most common feature (70%) consumers said they use from their ISPs, followed by virus protection (44%).

Source: Market Strategies, Inc. - USTelecom and NCTA Consumer Survey July 2017

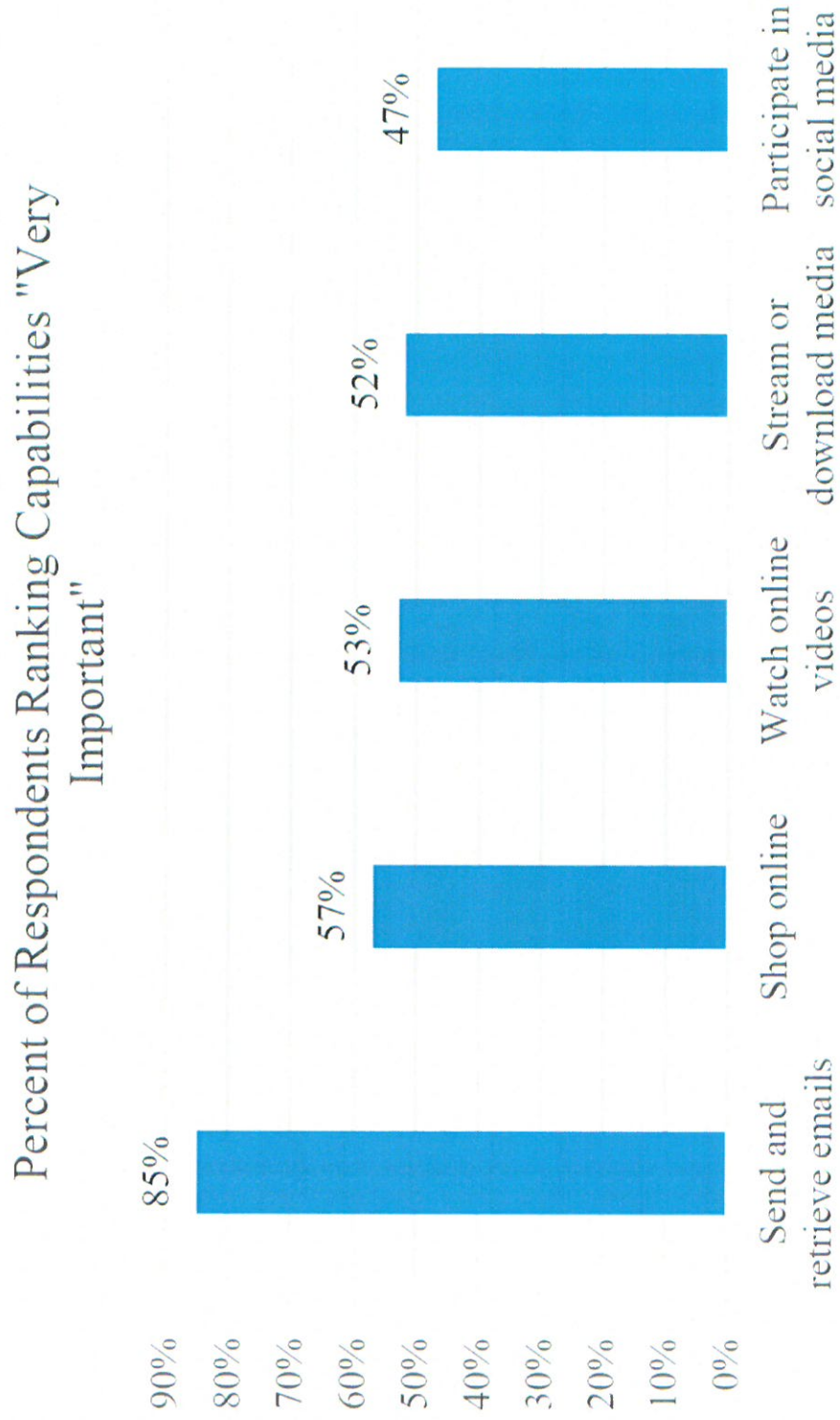
Consumers Expect ISPs to Provide All Information Services Capabilities

Consumers' Expectations of Information Service Capabilities From Their Broadband Internet Access Service
(N=1,210)



Source: Market Strategies, Inc. - USTelecom and NCTA Consumer Survey July 2017

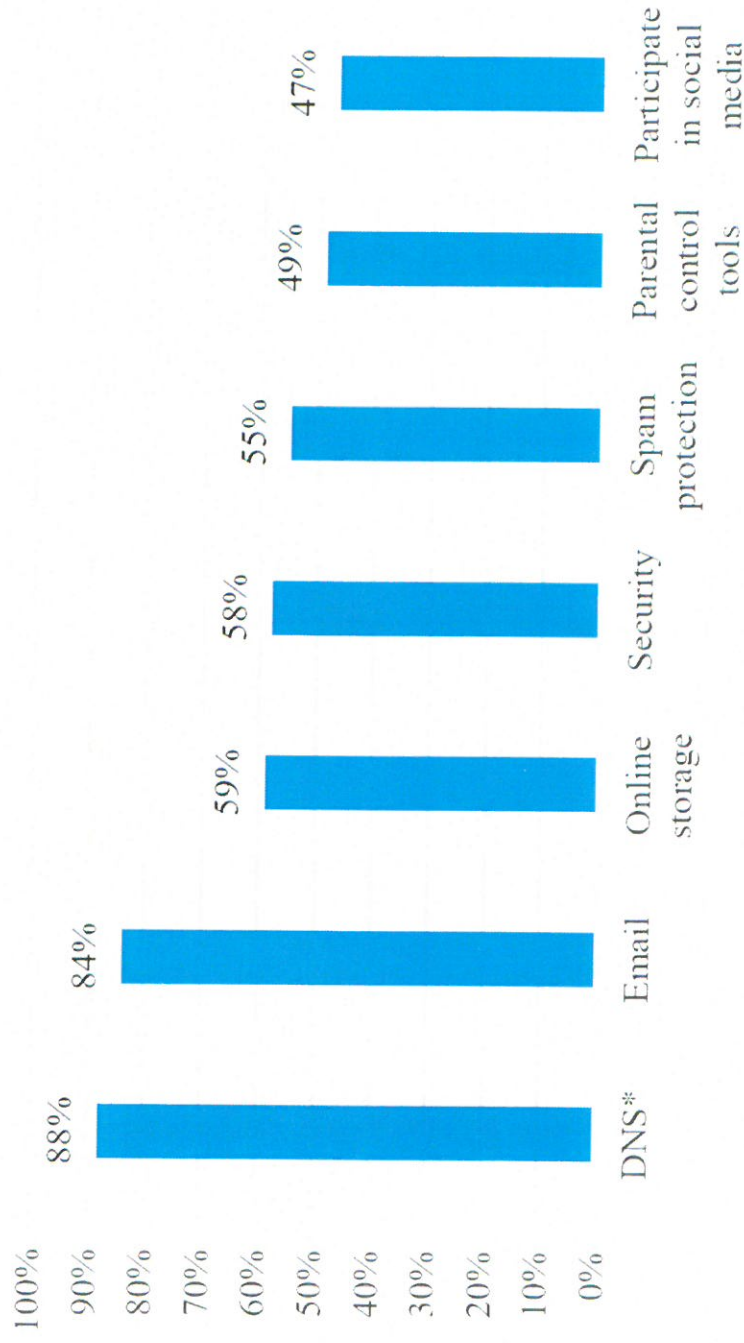
Internet Users Value Information Service Capabilities



Source: Market Strategies, Inc. - USTelecom and NCTA Consumer Survey July 2017

Internet Users Aware of Information Service Capabilities

Percent of Respondents Saying Their ISP Offers Capabilities



Source: Market Strategies, Inc. - USTelecom and NCTA Consumer Survey July 2017

* DNS , or Domain Name System, is a capability that allows consumers to reach a website by typing in a simple website name or address rather than having to know the specific numerical Internet Protocol (IP) address.

Internet Users Using Information Service Capabilities

