

Digital Infrastructure and Video Competition Act (DIVCA)

REPORT TO THE GOVERNOR AND THE LEGISLATURE

April 2024



**California Public
Utilities Commission**

Thanks to:

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1. Introduction

The California Public Utilities Commission’s (CPUC) Communications Division prepared this report as part of its reporting obligation pursuant to the Digital Infrastructure and Video Competition Act (DIVCA) of 2006¹ and California Public Utilities Code sections 914.3,² 914.4, and 5920. DIVCA transferred responsibility for issuing cable television franchises from cities and counties to the CPUC.³ This report includes video service-related information (i.e., subscription, deployment, and employment⁴) reported as of December 31, 2021, and December 31, 2022 by video franchise holders and their local affiliates. Inclusion of this self-reported information from franchise holders in this report neither confirms nor refutes accuracy. The CPUC neither concludes any findings nor confirms the accuracy of the franchise holders’ self-reported information. During the CPUC’s development of this report, some franchise holders admitted to the CPUC that they incorrectly reported deployment information for both year-end 2021 and 2022. They identified differing database sources, data processing errors, insufficient geographical information, revised data collection instructions, and using third-party vendors as contributing factors to incorrect information. In addition, over one million deployments included in this report remain unexplained as we await responses from several franchise holders. The CPUC publishes the list of video franchise holders, new franchises, and amended franchises online.⁵

Public Utilities Code Sections 914.3 and 5985

Senate Bill (SB) 28 (Caballero) Chapter 673, Statutes of 2021, repealed and replaced Public Utilities Code section 5960 with Public Utilities Code section 5895. Public Utilities Code section 5895 authorizes the CPUC to collect granular data from video franchise holders. Therefore, all reports since April 2021—which Public Utilities Code section 914.3 still requires—now reflect this new granular data. Current law lacks clear direction about reporting for annual reports.

Public Utilities Code Sections 914.4 and 5920

Public Utilities Code Section 914.4 requires the CPUC to report employment-related information to the Legislature annually. Public Utilities Code section 5920 requires the CPUC to collect the following employment information from state video franchise holders employing more than 750 employees in California:

¹ See Public Utilities (Pub. Util.) Code, §§ 5800 et seq. All statutory references are to the Public Utilities Code, unless otherwise noted. See also https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=PUC&division=2.5.&title=&part=&chapter=&article= and http://www.leginfo.ca.gov/pub/05-06/bill/asm/ab_2951-3000/ab_2987_bill_20060929_chaptered.html.

² Senate Bill 28, https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB28, repealed Pub. Util. Code, § 5960, subd. (b), which specified the information that the CPUC must report.

³ See Pub. Util. Code, § 5840, subd. (a).

⁴ This report includes updates and corrections to the total number of employees and percentage of employees residing in California as of year-end 2021.

⁵ See <https://www.cpuc.ca.gov/regulatory-services/licensing/video-franchising>.

- Number of California residents employed on a full-time basis;
- Percentage of the franchise holder’s total domestic workforce residing in California;
- Employees categorized by occupation;
- Average wages and salaries (including benefits) categorized by occupation;
- Number of out-of-state residents employed by independent contractors, which provide services to the franchise holder, unless the franchise holder is contractually prohibited from disclosing this information to the public; and
- Forecast of the number of net new positions expected to be created during the next year.

The franchise holders’ employees may be involved in wireline telephone, video, and/or data services.

DIVCA does not require franchise holders to categorize their employees by the type of services/technologies they work on. The employment data also includes information about employees of locally franchised affiliates of franchise holders.

2021

As of December 31, 2021, the CPUC cumulatively issued 67 initial video franchises and 317 amendments to those franchises since our implementation of DIVCA. Amendments typically add or subtract areas to the franchise service areas. There existed 26 video franchise holders by year-end 2021. For 2021, the CPUC received about 25 million (24,650,910⁶) records⁷ of deployment of video services (deployments) and about 5.1 million records of subscription to linear⁸ video services (subscriptions⁹).

2022

As of December 31, 2022, the CPUC issued 9 amendments to franchise holders, thus increasing the cumulative total to 326 amendments from year-end 2021. The same 26 video franchise holders existed by year-end 2022. For 2022, the CPUC received about 26 million (26,345,054¹⁰) video service deployments and about 4.7 million subscriptions.¹¹

⁶ Our Geographical Information System (GIS) software identified a mismatch of 8,656 deployments for the year-end 2021 information. Various factors related to geocoding were inaccurate as submitted by franchise holders. This is why the accuracy was 99.97% instead of 100%. We excluded these 8,656 deployments in this report.

⁷ Records refer to rows of data in a database or data file.

⁸ Linear video is a television service where the viewer must watch a scheduled program at the time it is offered, and on the “channel” it is presented, or recorded for later viewing. Alternatives to this are Over-The-Top (OTT) streaming services, digital video recorders (DVRs) and video-on-demand services.

⁹ For year-end 2021, franchise holders reported subscription information by census block instead of at a more granular level such as by address.

¹⁰ The GIS software identified a mismatch of 8,443 deployments for the year-end 2022 information. We excluded these 8,443 deployments in this report. Additionally, franchise holders submitted 974 records lacking sufficient geographical information to map them.

¹¹ Franchise holders reported subscription information at a more granular level such as an address and/or with latitude and longitude coordinates.

2. Highlights of Franchise Holders' Self-Reported Information

Contrasting 2022 with 2021

- A majority (57) of the counties had at least one franchise holder offering linear video services.
- Most (75%) census blocks still had two or more franchise holders offering linear video services.
- The number of census blocks lacking any franchise holder decreased by 520 while the number of census blocks with only one franchise holder decreased by 249.
- The northern third of the state still had both relatively low median household income (MHI) and video deployments compared to other parts of the state.
- Seven counties (i.e., Kings, Imperial, Sutter, Yuba, Lake, Lassen, and Trinity Counties) had a lower deployment level in 2022 than in 2021.¹²
- The number of franchise holders remained the same.
- The number of video deployments received increased by about 1.7 million.¹³
- The number of subscriptions to video services decreased by 327,544.
- The five franchise holders with more than 750 employees reported a total decrease of 1,420 employees. Frontier California Inc. (Frontier) reported the largest percentage and nominal decreases in its number of employees by 33% and 915, respectively. Only Charter Communications Inc. (Charter) increased its number of employees.

2022

- Only Mariposa County lacked the availability of video services.
- The five franchise holders with more than 750 employees reported a total of 17,769 employees. Charter had the highest number of employees. None of these franchise holders forecasted hiring additional employees for 2023.

2021

- Sierra and Mariposa Counties lacked the availability of video services.

¹² Franchise holders have the option to submit amendments to change their service territories. It is also possible for them to report changes to their deployment levels.

¹³ The 1.7 million figure represents the net change in video deployment for eight franchise holders at the end of 2022. We followed up with these eight franchise holders. Some franchise holders confirmed reporting incorrectly for their end-of-year data most of which involved errors with 2021 data, while others have yet to respond. We continue to research this net change in video deployment.

- The five franchise holders with more than 750 employees reported a total of 19,189 employees. Charter had the highest number of employees while DIRECTV, LLC (DIRECTV) had the lowest percentage of employees residing in California. Charter was the only franchise holder that forecasted hiring additional employees for 2022.

3. Analysis of Collected Information about Subscription and Deployment of Video Services for Year-End 2021

This section indicates the subscription and deployment levels in the state using tables and maps as reported by franchise holders for year-end 2021. Pursuant to SB 28, codified in Public Utilities Code section 5895, the CPUC must “collect granular data on the actual locations served” from franchise holders. Staff issued a data request for franchise holders to submit the following information by June 1, 2022:

- Video deployment information meaning all the franchise holder’s serviceable location addresses;¹⁴
- Video subscription information meaning the number of franchise holder’s video subscriptions aggregated to the census block level.

However, some franchise holders refused to respond to the data request unless the CPUC issued a subpoena for them to submit the requested data to us. The CPUC issued the subpoena on November 10, 2022 to the relevant companies with a new submission deadline of November 29, 2022. Therefore, the need for this subpoena delayed the submission, collection, and analyses of required video deployment and subscription information.

Video Subscription

As of year-end 2021, franchise holders reported over 5 million (5,076,610) subscriptions to linear video services. They reported these subscriptions by census block and not by serviceable location address.

Video Deployment

As of year-end 2021, franchise holders reported about 25 million (24,650,910) deployments of linear video services. They reported these deployments by serviceable location address. Multiple franchise holders could have deployed at the same address.

Video Deployment by Census Block

Showing the deployment level of video services in terms of the number of franchise holders by census block can provide a relevant depiction of the availability¹⁵ of video services. For example, this report contains two

¹⁴ “Serviceable Locations” are locations where holders have built out their video network infrastructure and to which they either currently provide service or could perform a standard video installation within 10 days without an extraordinary expenditure of resources.

¹⁵ Franchise territory depicted by census blocks does not necessarily imply video services are available to all locations within those census blocks or that competition exists between multiple franchise holders within the same census block.

maps and related tables that show the census blocks and counties where there exist multiple franchise holders competing to offer linear video services to the same potential customers.

Table 1 shows that two or more franchise holders offer linear video services in about 75% of the 519,723 census blocks in California; and roughly 93% of California’s population¹⁶ live in these census blocks. About 25% of the census blocks had one or no franchise holders offering linear video services; and roughly 7% of California’s population live in these census blocks.

Table 1: Number and Percentage of Census Blocks¹⁷ by the Number of Franchise Holders Offering Linear Video Services as of Year-End 2021

Number of Franchise Holders Offering Video Service	Number of Census Blocks	Percentage of All Census Blocks as of Year-End 2021	Population	Population Percentage
0	22,323	4.30%	191,569	0.48%
1	108,176	20.81%	2,699,869	6.83%
2	351,870	67.71%	32,774,180	82.89%
3	36,453	7.01%	3,791,482	9.59%
4	834	0.16%	67,658	0.17%
5	67	0.01%	13,465	0.03%

Map Showing Video Deployment by Census Block

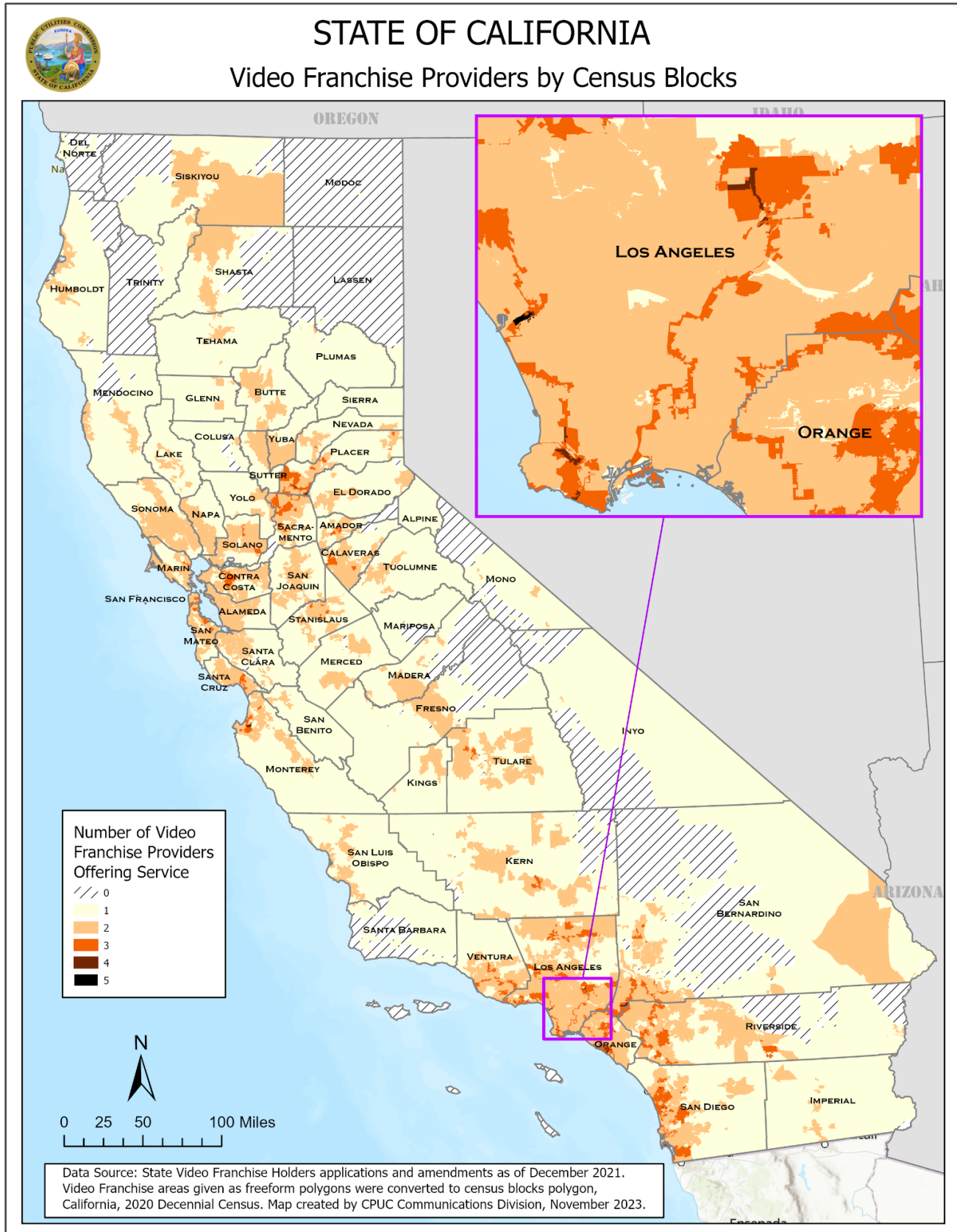
Figure 1, “Video Franchise Providers by Census Blocks,” uses Table 1 data and visually illustrates the ongoing problem that rural or less dense areas of the state often have one or no franchise holders offering video service, while the metropolitan coastal areas tend to have multiple franchise holders offering video service in the same census blocks. Los Angeles County has the greatest number of franchise holders (i.e., Charter¹⁸, DIRECTV, Frontier, Hotwire Communications, and RaceTV LLC) offering video services in 67 census blocks within the county.

¹⁶ Population counts from the U.S. Census Bureau 2020 Decennial Census.

¹⁷ The US Census Bureau wrote after the 2020 Census there were 519,723 census blocks in California: https://www2.census.gov/geo/docs/maps-data/data/geo_tallies2020/tallies_by_state/California_06.txtch

¹⁸ The CPUC issued franchise # 0020 to Spectrum Pacific West, LLC, which does business as Charter.

Figure 1:



Video Deployment by County

Showing the deployment level of video services on a county basis can also provide a relevant depiction of the availability of video services. For example, Table 2 shows the number of counties broken down by the range of video deployments.¹⁹ Table 2 indicates that two counties lack any address to which franchise holders have deployed video services. About two-thirds (36) of the counties have a volume of up to 250,000 video deployments meaning franchise holders reported deploying to 1-250,000 deployments in each of these 36 counties.

Table 2: Number of Counties by Video Deployment Level as of Year-End 2021

Range of Video Service Deployments	Number of Counties with Deployed Video Services as of Year-End 2021
0	2
1 – 250,000	36
250,001 – 500,000	8
500,001 – 1,500,000	8
1,500,001 – 2,000,000	2
2,000,001 – 6,303,755	2

Maps Showing Video Deployment and Income by County

Figure 2, “Video Deployments by County,” visually depicts Table 2. For example, Los Angeles and San Diego counties represent the two counties with the largest volume of video deployments while Sierra and Mariposa counties lack the availability of any video services.

¹⁹ Franchise holders provided 24,650,910 video service deployments by actual location (e.g. address). The submitted deployment information included addresses, locations, and/or latitude and longitude coordinates. CPUC staff geocoded address information using Environmental Systems Research Institute, Inc.’s (ESRI) StreetMap Premium 2nd quarter (Q2) 2023 version.

Figure 2:

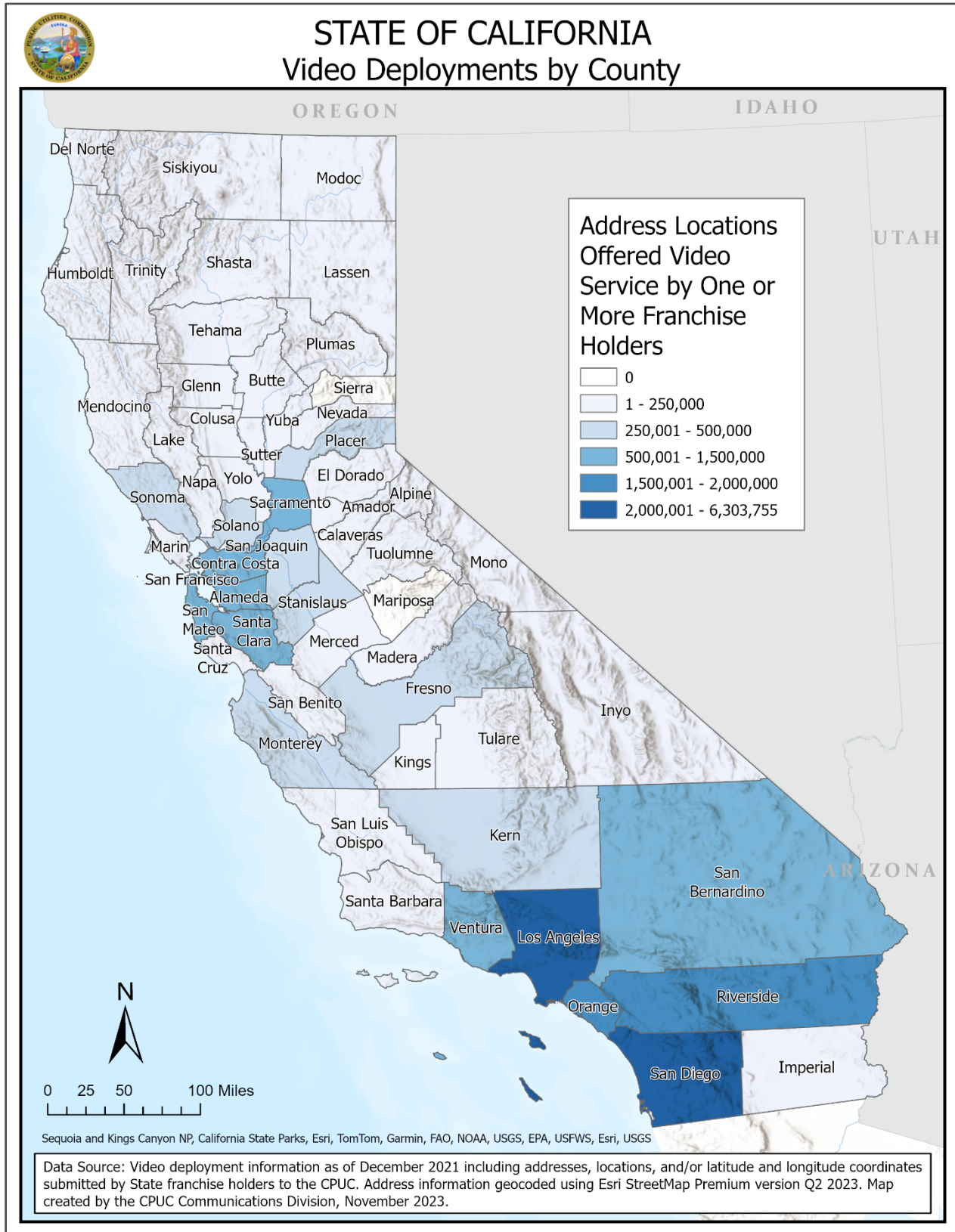


Table 3 combines the number of video service deployments in descending order with the corresponding median household income²⁰ for the county. Table 3 lists counties with the greatest number of deployments (i.e., highest video deployment level). For example, Los Angeles County has about 6.4 million reported deployments of video service²¹ while Sierra and Mariposa Counties lack any video service deployments. This means that residents of Sierra and Mariposa Counties would not have been able to purchase video services as of year-end 2021 based on information reported by franchise holders.

Table 3: Video Deployments as of Year-End 2021 and Median Household Income by County

County	Video Deployments as of Year-End 2021	Median Household Income Past 12 Months (inflation-adjusted dollars)
California Total	24,650,910	\$82,967
Los Angeles County	6,303,755	\$83,411
San Diego County	2,373,231	\$96,974
Orange County	1,951,415	\$109,361
Riverside County	1,502,038	\$84,505
Santa Clara County	1,241,778	\$153,792
San Bernardino County	1,184,297	\$77,423
Alameda County	1,164,758	\$122,488
Sacramento County	1,122,493	\$84,010
Contra Costa County	860,401	\$120,020
San Francisco County	678,077	\$136,689
San Mateo County	524,723	\$149,907
Ventura County	506,457	\$102,141
Kern County	478,919	\$63,883
Fresno County	466,291	\$67,756
San Joaquin County	437,639	\$82,837
Sonoma County	387,956	\$99,266
Stanislaus County	326,483	\$74,872
Solano County	313,082	\$97,037
Placer County	281,994	\$109,375

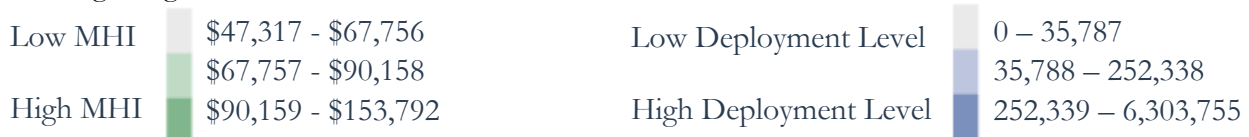
²⁰ See [ACS Median Household Income Variables - Boundaries - Overview \(arcgis.com\)](https://www.arcgis.com/home/item.html?id=45ede6d6ff7e4cbbbffa60d34227e462) at <https://www.arcgis.com/home/item.html?id=45ede6d6ff7e4cbbbffa60d34227e462>. According to ESRI, it updates this data annually to contain the most currently released data updates. Tables 3 and 8 uses the update from December 12, 2023.

²¹ This could mean that several video franchise holders are serving the same household.

County	Video Deployments as of Year-End 2021	Median Household Income Past 12 Months (inflation- adjusted dollars)
Monterey County	252,338	\$91,043
Tulare County	211,586	\$64,474
Marin County	195,905	\$142,019
Santa Barbara County	180,986	\$92,332
Santa Cruz County	163,970	\$104,409
Yolo County	145,558	\$85,097
San Luis Obispo County	128,614	\$90,158
Merced County	125,462	\$64,772
El Dorado County	101,349	\$99,246
Napa County	100,695	\$105,809
Butte County	99,565	\$66,085
Kings County	70,027	\$68,540
Shasta County	69,512	\$68,347
Madera County	67,370	\$73,543
Humboldt County	65,899	\$57,881
Imperial County	63,383	\$53,847
Sutter County	63,026	\$72,654
Yuba County	48,029	\$66,693
Nevada County	45,812	\$79,395
Lake County	35,787	\$56,259
San Benito County	34,872	\$104,451
Mendocino County	31,130	\$61,335
Tuolumne County	26,391	\$70,432
Calaveras County	25,492	\$77,526
Tehama County	16,211	\$59,029
Amador County	15,372	\$74,853
Mono County	13,623	\$82,038
Del Norte County	13,451	\$61,149
Siskiyou County	12,200	\$53,898
Inyo County	9,145	\$63,417
Glenn County	7,804	\$64,033
Lassen County	7,092	\$59,515
Colusa County	3,461	\$69,619

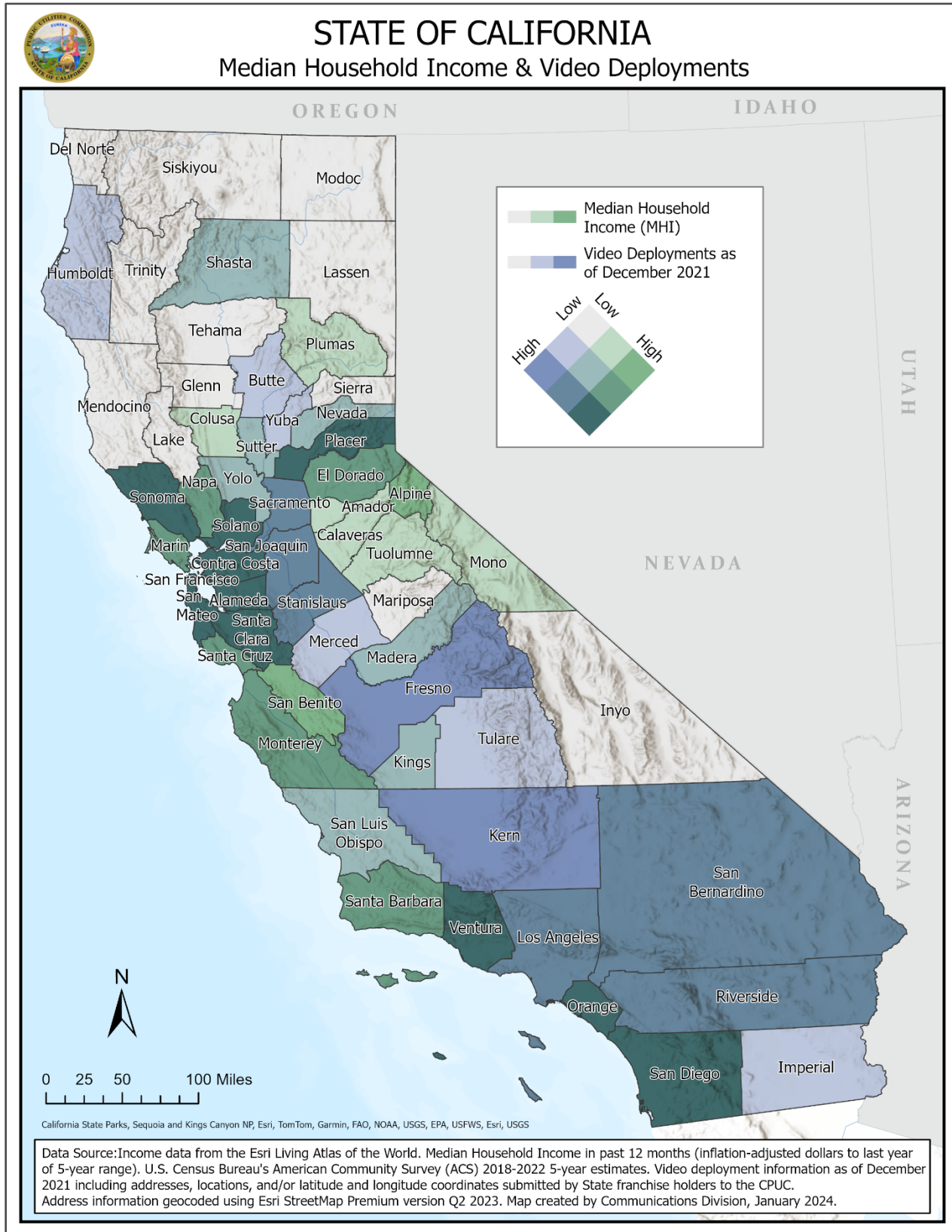
County	Video Deployments as of Year-End 2021	Median Household Income Past 12 Months (inflation-adjusted dollars)
Plumas County	3,291	\$67,885
Modoc County	1,934	\$54,962
Trinity County	1,519	\$47,317
Alpine County	223	\$101,125
Mariposa County	0	\$60,021
Sierra County	0	\$61,108

Figure 3, “Median Household Income & Video Deployments,” visually depicts Table 3 based on the following categorization:



Several of the counties (Del Norte, Siskiyou, Modoc, Trinity, Tehama, Lassen, Mendocino, Lake, Glenn, Sierra, Mariposa, and Inyo Counties) in the northern third of the state have both relatively low MHI and video deployment compared to other areas in the state.

Figure 3:



4. Employment Data for Year-End 2021²²

The five franchise holders with more than 750 employees reported a total of 19,189 employees in California as of December 31, 2021. Table 4 shows the percentage of each franchise holder's workforce that resides in California and the forecasts for adding net new employees during 2022. Charter was the only franchise holder that forecasted hiring additional employees during 2022.

On August 2, 2021, AT&T California (AT&T) announced it completed a transaction to spin-off their U-Verse linear video business into a newly created DIRECTV entity. As a result of AT&T transferring their video franchise to DIRECTV, the number of employees will only include DIRECTV staffing resources and average wages for 2021 and going forward. Published employment data beginning this year will no longer include information describing AT&T's staffing resources and average wages.

Table 4: Number of Employees as of Dec. 31, 2021, Forecasted Number of Hires for 2022, and Percentage of Employees Residing in California of the Five Largest Franchise Holders

Franchise Holder	# of Employees Dec. 31, 2021	# of Employees Forecasted for 2022	% of Employees Residing in California
Cox	1,514	0	99.3%
DIRECTV	2,333	0	23.5%
Frontier	2,785	0	100%
Comcast	4,287	0	100%
Charter	8,270	304	99.7%

Employees and Average Wages Categorized by Occupation

The five reporting franchise holders with more than 750 employees categorized their 19,189 employees into eight different occupational categories. Skilled craft workers made up the largest category of workers for four of these five franchise holders. Table 5 below shows the average wage, including benefits, that each franchise holder reported for each occupational category.

²² This report includes updates and corrections to the May 2023 Employment Report regarding total number of employees and percentage of employees residing in California. For example, Table 5 updates discrepancies found in the salaries provided by franchise holders previously reported in the May 2023 Employment Report.

Table 5: Employee Count & Average (Avg.) Wages (\$) on Dec. 31, 2021, Categorized by Occupation for Each of the Five Largest Franchise Holders

Occupational Categories		DIRECTV	Frontier	Comcast	Cox	Charter
Exec / Sr. Leaders	Count / Avg. Wage	0 N/A ²³	7 \$256,300	42 \$142,138	1 N/A ²⁴	3 \$714,477
Officials / Managers	Count / Avg. Wage	404 \$175,059	211 \$139,390	746 \$179,622	256 \$126,517	1,196 \$133,902
Professionals	Count / Avg. Wage	1,119 \$123,220	30 \$81,222	661 \$139,565	134 \$101,349	696 \$110,838
Technicians	Count / Avg. Wage	724 \$64,941	0 N/A	130 \$177,682	162 \$83,090	191 \$88,386
Sales / Associates	Count / Avg. Wage	24 \$102,975	216 \$104,931	792 \$121,071	266 \$91,322	1,659 \$72,248
Office / Clerical	Count / Avg. Wage	20 \$63,675	41 \$92,291	320 \$131,511	186 \$71,494	1,881 \$61,958
Skilled Crafts	Count / Avg. Wage	0 ²⁵ N/A	2,280 \$101,378	1,594 \$170,400	475 \$78,016	2,644 \$72,893
Laborers/Operatives	Count / Avg. Wage	42 \$47,240	0 N/A	2 N/A ²⁶	34 \$52,738	0 N/A

²³ DIRECTV reported zero Executives / Sr. Leaders.

²⁴ Cox Communications California LLC (Cox) reported one Executive / Sr. Leader. Providing salary data would be individually identifiable, thus excluded from this table.

²⁵ DIRECTV reported zero skilled crafts workers and 724 technicians. AT&T California owns and maintains the wireline network that DIRECTV uses to deliver the U-verse linear video service, so the skilled crafts workers work for AT&T, not DIRECTV.

²⁶ Comcast reported two Operatives but did not provide any salary for this type of role.

5. Analysis of Collected Information about Subscription and Deployment of Video Services for Year-End 2022

This section indicates the subscription and deployment levels in the state using tables and maps as reported by franchise holders for year-end 2022. Staff issued a data request for franchise holders to submit the following information by April 3, 2023:

- Video deployment information meaning all the franchise holder’s serviceable location addresses;
- Video subscription information meaning the number of franchise holder’s video subscriptions by service address and latitude and longitude coordinates; and
- Video revenue information.

However, some franchise holders refused to respond to the data request unless the CPUC issued a subpoena for them to submit the requested data to us. The CPUC issued the subpoena on April 10 and May 2, 2023 to the relevant companies with a new submission deadline. Therefore, the need for this subpoena delayed the submission, collection, and analyses of required video deployment and subscription information.

Video Subscription

As of year-end 2022, franchise holders reported about 4.7 million (4,749,066) subscriptions to linear video services. They reported these subscriptions with more granular location information such as the service address and/or latitude and longitude coordinates.

Video Deployment

As of year-end 2022, franchise holders reported about 26 million (26,345,054) video service deployments. They reported these deployments by serviceable location address and/or latitude and longitude coordinates. Multiple franchise holders could have deployed at the same address.

Video Deployment by Census Block

Showing the deployment level of video services in terms of the number of franchise holders by census block can provide a relevant depiction of the availability of video services for year-end 2022. For example, this report contains two maps and related tables below showing the census blocks and counties where there exist multiple franchise holders competing to offer linear video services to the same potential customers.

Table 6 shows that two or more franchise holders continued to offer linear video services in about 75% of the 519,723 census blocks in California; and roughly 93% of California’s population²⁷ live in these census blocks as of year-end 2022. About 25% of the census blocks still had one or lack any franchise holders offering linear video services; and roughly 7% of California’s population continued to live in these census blocks. Nonetheless, a lower number of census blocks (i.e., 520) lacked any franchise holders from the previous year. Additionally, the number of census blocks (i.e., 249 with a population of 47,537) with only one franchise holder also decreased.

Table 6: Number and Percentage of Census Blocks by the Number of Franchise Holders Offering Linear Video Services as of Year-End 2022

Number of Franchise Holders Offering Video Services	Number of Census Blocks	Percentage of All Census Blocks as of Year-End 2022	Population	Population Percentage
0	21,803	4.20%	177,303	0.45%
1	107,927	20.77%	2,652,288	6.71%
2	351,564	67.64%	32,706,811	82.72%
3	37,490	7.21%	3,916,850	9.91%
4	872	0.17%	71,506	0.18%
5	67	0.01%	13,465	0.03%

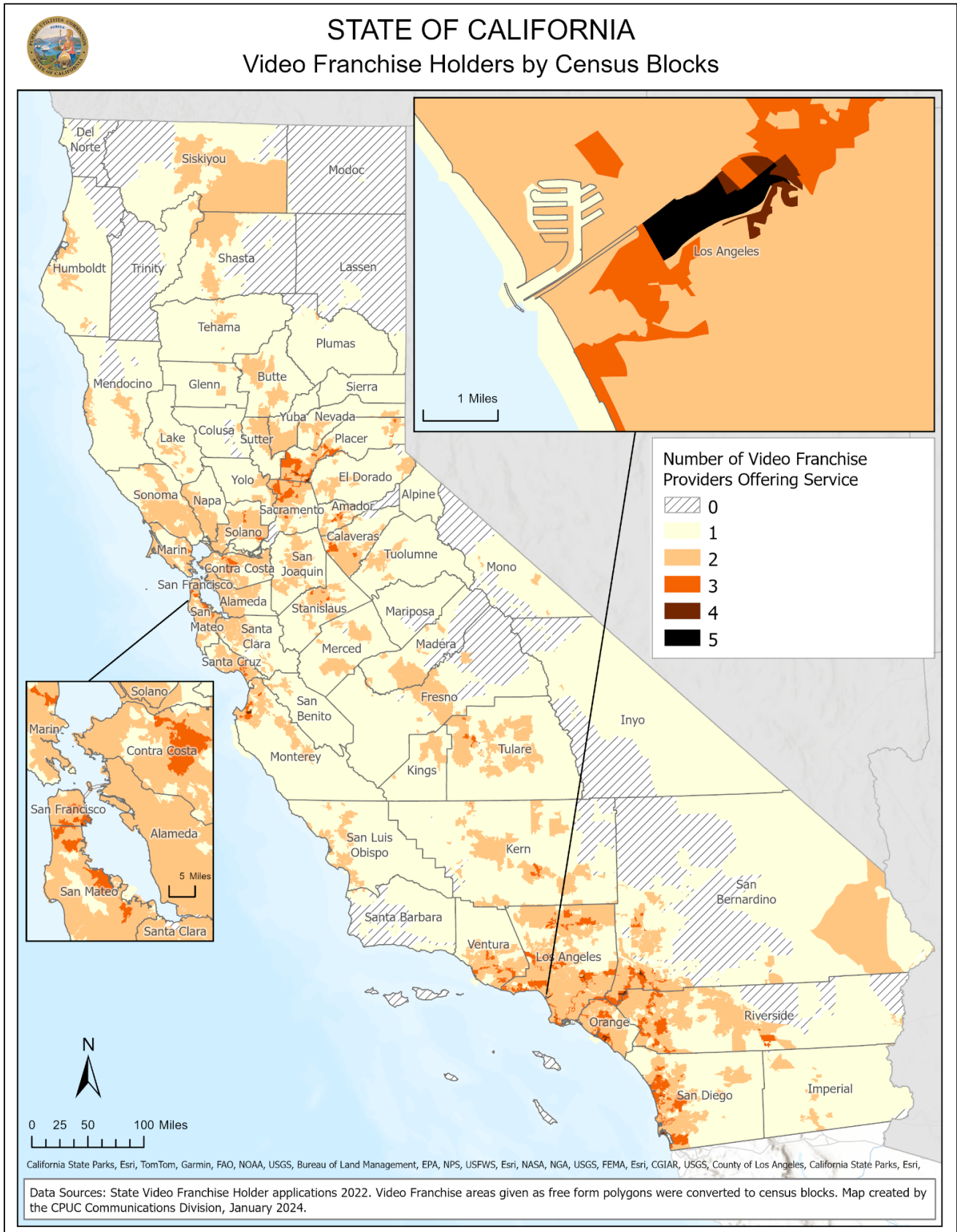
Map Showing Video Deployment by Census Block

Figure 4, “Video Franchise Holders by Census Blocks,” uses Table 6 data. Los Angeles County continues to have the greatest number of franchise holders including Charter, DIRECTV, Frontier, Hotwire Communications, and RaceTV LLC. In one area of the county, all five report offering video services within the same 67 contiguous census blocks²⁸ to a population of about 13,465 as shown in the map below.

²⁷ Population counts from the U.S. Census Bureau 2020 Decennial Census.

²⁸ This area includes the Alsace enclave and the Playa Vista neighborhood in the Westside region of Los Angeles County.

Figure 4:



Video Deployment by County

Showing the deployment level of video services on a county basis can also provide a relevant depiction of the availability of video services as of year-end 2022. For example, Table 7 shows the number of counties broken down by the range of video deployments. Table 7 indicates that there exists just one county lacking any address to which franchise holders have deployed video services, which is a decrease from year-end 2021. Additionally, the number of counties falling within the 500,001 – 1,500,000 range depicts an increase by two counties, Fresno and Kern, as compared to year-end 2021. Lastly, the number of counties with more than 2 million deployments shows an increase by one county, Orange, in 2022 from 2021.

Table 7: Number of Counties by Volume of Video Service Deployments as of Year-End 2022

Range of Video Service Deployments	Number of Counties with Deployed Video Services as of Year-End 2022
0	1
1 – 250,000	37
250,001 – 500,000	6
500,001 – 1,500,000	10
1,500,001 – 2,000,000	1
2,000,001 – 6,527,861	3

Maps Showing Video Deployment and Income by County

Figure 5, “Video Deployments by County,” visually depicts Table 7. For example, Los Angeles, Orange, and San Diego Counties represent the three counties with the largest volume of video deployments for year-end 2022. Mariposa County continues to lack the availability of video services in 2022.

Figure 5:

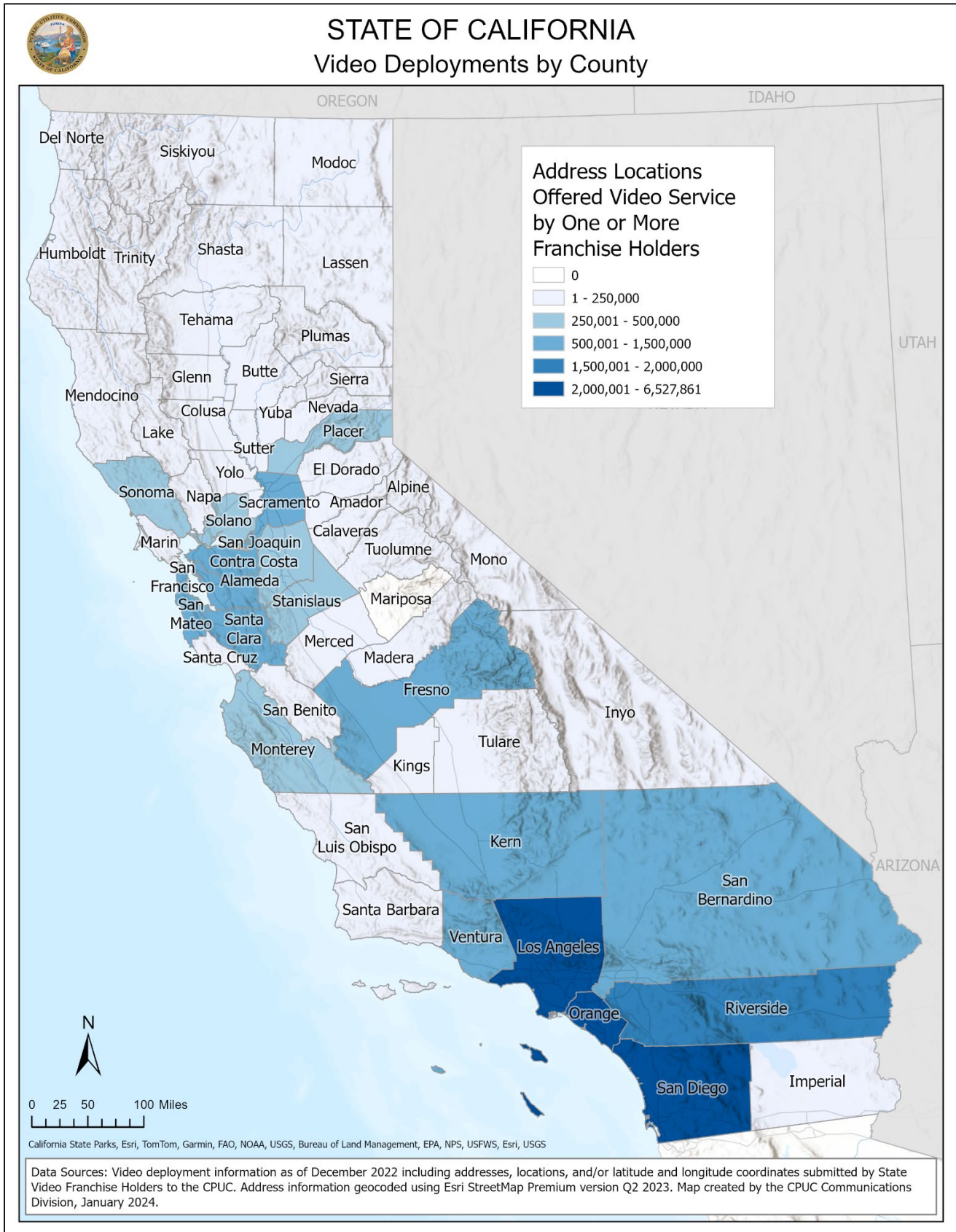


Table 8 combines the number of video service deployments as of year-end 2022 in descending order with the corresponding median household income for the county. Table 8 lists counties with the greatest number of deployments (i.e., highest video deployment level) at the top. For example, Los Angeles County has about 6.5 million video service deployments reported while Sierra County has just one video service deployment reported. Seven counties (i.e., Kings, Imperial, Sutter, Yuba, Lake, Lassen, and Trinity Counties) show a lower deployment level as of year-end 2022 compared to the previous year. However, most (50) of the counties indicate a higher deployment level as of year-end 2022.

Table 8: Video Deployments as of Year-End 2022 and Median Household Income by County

County	Video Deployments as of Year-End 2022	Median Household Income Past 12 Months (inflation-adjusted dollars)
California Total	26,345,054	\$82,967
Los Angeles County	6,527,861	\$83,411
San Diego County	2,628,814	\$96,974
Orange County	2,144,489	\$109,361
Riverside County	1,578,377	\$84,505
Santa Clara County	1,379,513	\$153,792
Alameda County	1,366,209	\$122,488
San Bernardino County	1,243,772	\$77,423
Sacramento County	1,211,606	\$84,010
Contra Costa County	930,307	\$120,020
San Francisco County	726,948	\$136,689
San Mateo County	649,817	\$149,907
Fresno County	581,450	\$67,756
Kern County	527,439	\$63,883
Ventura County	512,236	\$102,141
San Joaquin County	457,052	\$82,837
Sonoma County	393,301	\$99,266
Stanislaus County	334,691	\$74,872
Solano County	325,994	\$97,037
Placer County	291,599	\$109,375
Monterey County	265,312	\$91,043
Tulare County	212,303	\$64,474
Marin County	201,401	\$142,019
Santa Barbara County	196,862	\$92,332
Santa Cruz County	176,213	\$104,409

County	Video Deployments as of Year-End 2022	Median Household Income Past 12 Months (inflation- adjusted dollars)
Yolo County	151,414	\$85,097
San Luis Obispo County	130,991	\$90,158
Merced County	128,278	\$64,772
Napa County	107,642	\$105,809
El Dorado County	102,942	\$99,246
Butte County	100,335	\$66,085
Shasta County	70,883	\$68,347
Madera County	68,553	\$73,543
Kings County	66,633	\$68,540
Humboldt County	66,386	\$57,881
Imperial County	63,013	\$53,847
Sutter County	62,424	\$72,654
Nevada County	48,628	\$79,395
Yuba County	46,707	\$66,693
San Benito County	36,080	\$104,451
Lake County	35,781	\$56,259
Mendocino County	31,235	\$61,335
Tuolumne County	26,706	\$70,432
Calaveras County	25,578	\$77,526
Tehama County	16,590	\$59,029
Amador County	15,437	\$74,853
Siskiyou County	14,316	\$53,898
Mono County	14,052	\$82,038
Del Norte County	13,663	\$61,149
Inyo County	9,676	\$63,417
Glenn County	7,879	\$64,033
Lassen County	6,779	\$59,515
Colusa County	4,827	\$69,619
Plumas County	3,962	\$67,885
Modoc County	1,997	\$54,962
Trinity County	1,515	\$47,317
Alpine County	585	\$101,125

County	Video Deployments as of Year-End 2022	Median Household Income Past 12 Months (inflation-adjusted dollars)
Sierra County	1 ²⁹	\$61,108
Mariposa County	0	\$60,021

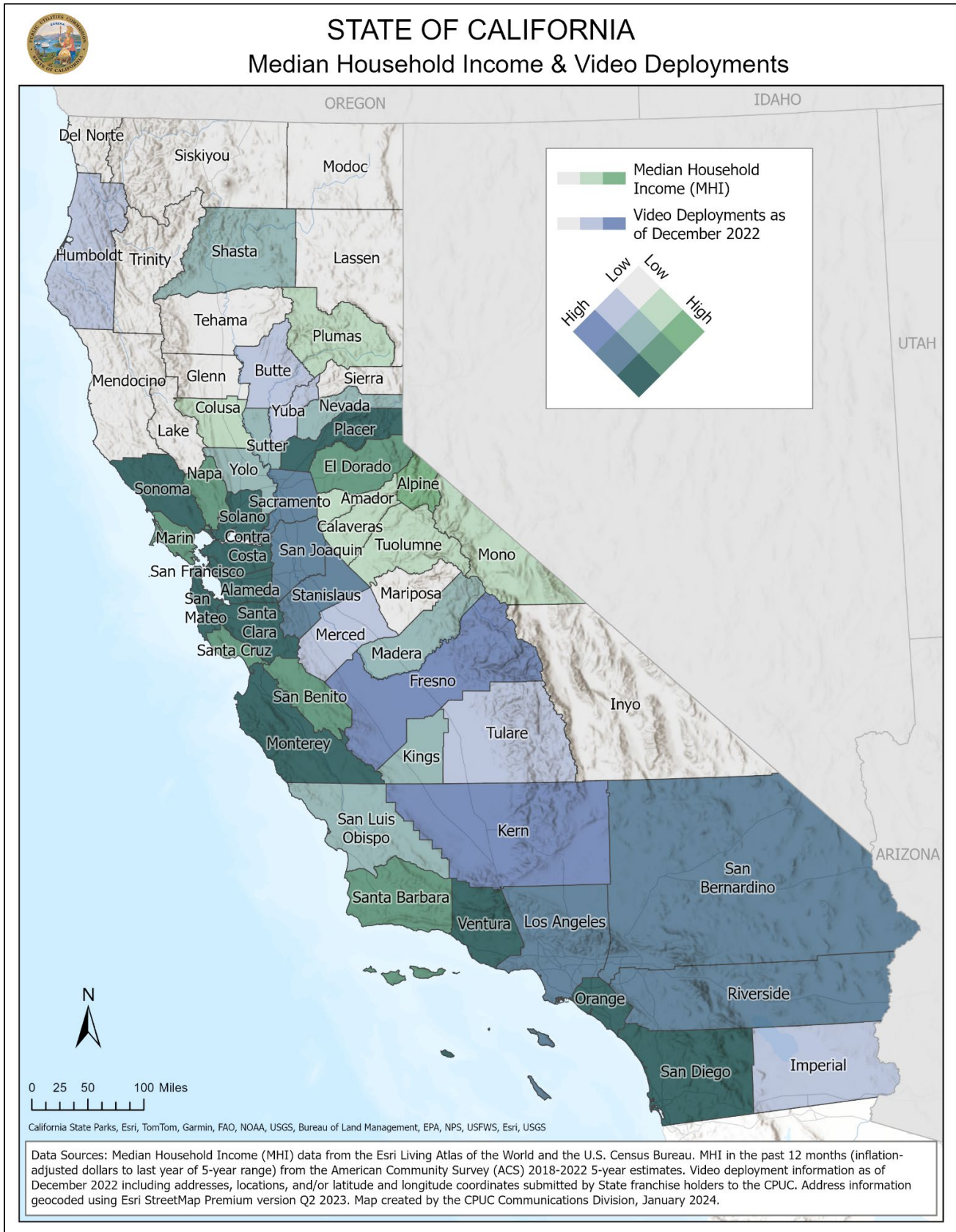
Figure 6, “Median Household Income & Video Deployments,” visually depicts Table 8 based on the following categorization:

Low MHI	\$47,317 - \$67,756	Low Deployment Level	0 – 35,787
	\$67,757 - \$90,158		35,788 – 252,338
High MHI	\$90,159 - \$153,792	High Deployment Level	252,339 – 6,527,861

Several of the counties (Del Norte, Siskiyou, Modoc, Trinity, Tehama, Lassen, Mendocino, Lake, Glenn, Sierra, Mariposa, and Inyo Counties) in the northern third of the state continue to have both relatively low MHI and video deployment compared to other areas in the state.

²⁹One location with video deployment was reported in Seirra County as of Year-End 2022, however more than one location with video deployment may exist according to data reported on the FCC National Broadband Map.

Figure 6:



6. Employment Data for Year-End 2022

The five reporting franchise holders with more than 750 employees reported a total of 17,769 employees in California as of year-end 2022. In contrast, these same franchise holders reported 19,189 employees as of December 31, 2021, which represents a decrease of 1,420 employees. Table 9 shows the percentage of each of these franchise holder’s workforce that resides in California and the forecasts for adding net new employees during 2023. None of these five franchise holders forecasted hiring additional employees during 2023. Charter has the greatest number of employees as of December 31, 2022. DIRECTV has the lowest percentage of employees residing in California by year-end 2022.

Table 9: Number of Employees as of Dec. 31, 2022, Forecasted Number of Hires for 2023, and Percentage of Employees Residing in California of the Five Largest Franchise Holders

Franchise Holder	# of Employees Dec. 31, 2022	# of Employees Forecasted for 2023	% of Employees Residing in California
Cox	1,412	0	99.5%
DIRECTV	2,236	0	23.5%
Frontier	1,870	0	100%
Comcast	3,863	0	100%
Charter	8,388	0	99.7%

Employees and Average Wages Categorized by Occupation

The five reporting franchise holders with more than 750 employees categorized their 17,769 employees into eight different occupational categories. Skilled craft workers made up the largest category of workers for four of these five franchise holders. Table 10 below shows the average wage, including benefits, that each franchise holder reported for each occupational category.

Table 10: Employee Count & Average (Avg.) Wages (\$) on Dec. 31, 2022, Categorized by Occupation for Each of the Five Largest Franchise Holders

Occupational Categories		DIRECTV ³⁰	Frontier	Comcast	Cox ³¹	Charter
Exec / Sr. Leaders	Count / Avg. Wage	0 N/A	12 \$165,731	53 \$206,160	1 N/A	5 \$627,735
Officials / Managers	Count / Avg. Wage	210 \$192,871	89 \$115,431	699 \$177,030	215 \$134,622	1,196 \$138,074
Professionals	Count / Avg. Wage	1,314 \$135,405	9 \$12,193 ³²	638 \$150,143	169 \$105,763	716 \$105,147
Technicians	Count / Avg. Wage	612 \$66,467	0 N/A	129 \$179,146	151 \$83,826	172 \$104,527
Sales / Associates	Count / Avg. Wage	28 \$188,800	106 \$98,600	624 \$131,199	248 \$96,359	1,819 \$83,552
Office / Clerical	Count / Avg. Wage	30 \$183,638	6 \$90,370	341 \$122,649	141 \$75,933	1,831 \$61,726
Skilled Crafts	Count / Avg. Wage	0 N/A	1,648 \$104,974	1,379 \$171,383	456 \$79,385	2,649 \$79,764
Laborers/Operatives	Count / Avg. Wage	42 \$47,642	0 N/A	0 N/A	31 \$53,647	0 N/A

³⁰ DIRECTV reported zero Executives / Sr. Leaders as of December 31, 2022. DIRECTV reported 0 skilled crafts and 612 technicians. AT&T California owns and maintains the wireline network that DIRECTV uses to deliver the U-verse linear video service, so the skilled crafts employees work for AT&T, not DIRECTV.

³¹ Cox reported one Executive/Senior Leader. Providing salary data would be individually identifiable, thus excluded from this report.

³² Frontier did not provide average wage for their professionals. This amount reflects only the benefits.