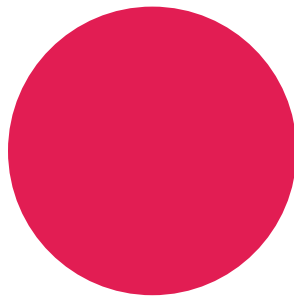




# INVESTING IN AMERICA

THE CABLE INDUSTRY'S ECONOMIC  
IMPACT ON PEOPLE, INFRASTRUCTURE &  
PROGRAMMING



2018

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# INTRODUCTION

Bortz Media & Sports Group, Inc. was retained by NCTA–The Internet & Television Association (“NCTA”) to update its 2017 study that evaluated the impact of the cable operator industry on the United States economy. This report sets forth the results of this update, including estimates of the direct and indirect impact of the industry on employment, personal income and gross output in 2018. In addition, the economic impact of the subscription TV program network industry is evaluated. Finally, an overview of other cable and program network industry contributions is provided, focusing on the role of these industries as major sources of domestic capital investment; in spurring telecommunications competition; in technological innovation and new services deployment; in providing programming choice; and in influencing American television viewing habits.

The report is divided into four sections:

- Section I briefly summarizes the methodology and objectives of economic impact analysis and details the flow of funds between cable operators and their key suppliers – including the program network segment.
- Section II details the direct, linked and total economic impacts attributable to the cable operator industry in 2018 and the growth in the industry’s economic contributions since 2002.
- Section III assesses the direct, linked and total impacts attributable to the program network industry in 2018 and the growth in its economic contributions over the past decade.
- Section IV examines other cable operator and program network industry contributions and impacts, emphasizing domestic capital investment, competition, choice, viewing and the use of technology to bring new services to U.S. households. The role of the cable industry in stimulating local economies through localized capital investment and job creation is a specific focus.

Finally, Appendix A to the report provides a more detailed discussion of the study methodology and the range of data sources used to compile the impact estimates, while Appendix B provides detail on the cable operator industry’s impacts in each state and U.S. Congressional District.

Bortz Media gratefully acknowledges the assistance of many firms and individuals, both inside and outside the cable industry, in providing the information necessary to complete this report.

## EXECUTIVE SUMMARY

The cable operator and program network industries are important providers of information and entertainment to the American consumer and the operators have a significant and rapidly growing role in the delivery of communications and broadband services to both consumers and businesses. Through aggressive investment of capital and efforts to deploy new and innovative services to consumers, both industries have fostered highly competitive communications markets. In addition, through these investment and innovation initiatives, the industries have made a substantial contribution to the United States economy.

### Cable Operator Industry Economic Impacts

As of 2018, the cable operator industry (directly and indirectly) accounted for nearly 2.4 million U.S. jobs and more than \$114 billion in personal income. Gross economic output attributable to the cable operator industry amounted to \$373 billion.

Other measures of the industry's economic impact include:

Cable operator revenues in 2018 totaled more than \$131 billion, providing direct employment to 264,100 people. Compensation to cable operator employees totaled almost \$23 billion.

- These cable operator industry employees can be found in all 50 states, as well as the District of Columbia, reflecting the overwhelmingly local character of an industry comprised of approximately 3,000 local cable systems. In fact, there are at least 300 cable operator industry employees in each U.S. Congressional District — and 1,000 to more than 4,000 employees in 55 Districts (see Appendix B for employment and impact by District).
- Since 2002, employment increases attributable directly to the cable operator industry have totaled almost 90,000 jobs — or 0.5 percent of all net new jobs created in the U.S. during this time frame.
- Cable operator industry suppliers provide another 165,000 cable-related jobs, representing personal income of \$18.3 billion.
- Since 2002, direct and indirect employment attributable to the cable operator industry has increased by more than 1.2 million jobs.
- Cable operators' economic impacts are spread throughout all major sectors of the U.S. economy. The largest private sector impacts are in the manufacturing and information sectors, each of which are critical to the overall health of the economy.

### Program Network Industry Economic Impacts

Program network revenues in 2018 totaled \$90 billion, providing direct employment to 61,000 people — an increase of about 27,000 jobs since 2002. Compensation to program network industry employees totaled \$11.0 billion. The program network industry (directly and indirectly) accounted for 1.3 million U.S. jobs in 2018, representing over \$46 billion in personal income. The industry's employment impact has increased by 530,000 jobs in the last 11 years. Gross economic output attributable to the industry amounts to \$157 billion.

The industry's impact is spread throughout all sectors of the U.S. economy. However, program network industry expenditures have a particular impact on the program production and sports industries. Together, these two industries derive more than \$37 billion in revenues, 83,100 jobs, and \$14.4 billion in employee compensation from the program network industry.

## Combined Impacts

The total impacts reported here accurately reflect the economic impacts of both the cable operator and program network industries. However, since the program network industry is a supplier to the cable operator industry, a portion of the program network industry's total impacts are subsumed in the total impacts of the cable operator industry. As such, the total impacts for both industries as presented in this report are not additive.

Bortz Media estimates that the two industries combined have an aggregate economic impact (direct and indirect) of approximately \$450 billion in gross economic output, and together account for 3.0 million jobs.

## Other Cable Operator and Program Network Industry Impacts

In addition to the purely economic impacts described above, the cable operator industry has led the development of the country's broadband infrastructure, contributing to a truly competitive communications marketplace. Both operators and programmers have fundamentally altered how most Americans view television, and through continual innovation they have introduced new content and services to consumers.

Specific indicators of these contributions include:

- Through infrastructure investment of \$300 billion since the mid-1990s, the cable operator industry has led the development of broadband Internet service in the U.S. – providing service to more than 66 million customers as of year-end 2018. Largely as a result of this investment, U.S. broadband speeds are among the world's fastest, while entry level broadband pricing is among the most affordable.
- Moreover, numerous analyses have concluded that the overall economy has benefitted from investments in broadband infrastructure. One study quantified a "broadband bonus" of almost one percent of U.S. GDP in 2010 (a level that is likely higher today). Further, a 2015 study found a positive relationship between home values and broadband speeds.
- The cable operator industry is a rapidly growing presence in business communications services, with revenues reaching almost \$18 billion in 2018.
- As a measure of the programming network industry's commitment to quality, the annual spending on programming by basic networks grew from \$1.4 billion in 1990 to \$39.9 billion in 2018. Spending has grown more than fourfold in the last 16 years. The top 10 cable networks spent an average of over \$1.7 billion in 2018, compared with \$732 million in 2007 and just \$267 million in 1997.
- Finally, the cable industry annually contributes substantially to charities, non-profit organizations and state and municipal coffers. In 2018, it is estimated that franchise and other consumer-related fees totaled \$3.5 billion, reflecting funds generally paid directly to local municipalities. In addition, sales and use taxes associated with cable subscriptions amounted to \$4.5 billion in revenues to state and local government entities.

## SECTION I.

# CABLE OPERATOR AND PROGRAM NETWORK INDUSTRY STRUCTURE AND FINANCIAL FLOWS

Economic impact analysis recognizes that dollars spent or invested help stimulate business activity and personal consumption throughout the economy. As a result, the growth of an industry generates total economic effects several times larger than the industry itself. In this report, Bortz Media has applied the principles of economic impact analysis to the cable operator and program network industries, based on our assessment of each industry's financial and investment characteristics.

This section briefly summarizes the economic impact analysis methodology employed in our assessment, followed by a discussion of the structure of the cable operator industry, estimates of 2018 industry financial flows and the role and characteristics of cable operator industry suppliers. The program network industry's structure and its role as a cable operator industry supplier is also briefly addressed.

## Overview/Methodology

The cable operator industry. This economic impact analysis traces the flow of dollars generated by the cable operator industry (and related jobs and personal income) throughout the economy. For example, assume that a cable subscriber pays his or her local cable operator for a subscription to the premium service HBO. The cable operator then pays a portion of that subscription fee to HBO. HBO, in turn, pays a portion to its employees, who may then use that income to purchase goods and services. Ultimately, the dollars initially paid by the cable subscriber are re-spent many times over, by many different businesses and individuals in many different sectors of the economy.

These re-spending effects are categorized as follows:

- **Direct impacts.** These are impacts generated directly by cable operators, including cable system jobs and employee income.
- **Linked impacts.** These are the jobs and income generated by suppliers linked to the cable operator industry such as programming services, equipment manufacturers and professional services firms.
- **Indirect impacts.** Indirect impacts include: (1) economic activity generated by the purchase of goods and services by cable operators' linked suppliers, referred to as intermediate effects; and (2) induced effects, or economic activity generated by the purchase of goods and services by individuals whose incomes derive directly or indirectly from the cable operator industry.

For purposes of simplification, only direct, linked and total impacts (combining direct, linked and indirect impacts) are presented in this report.

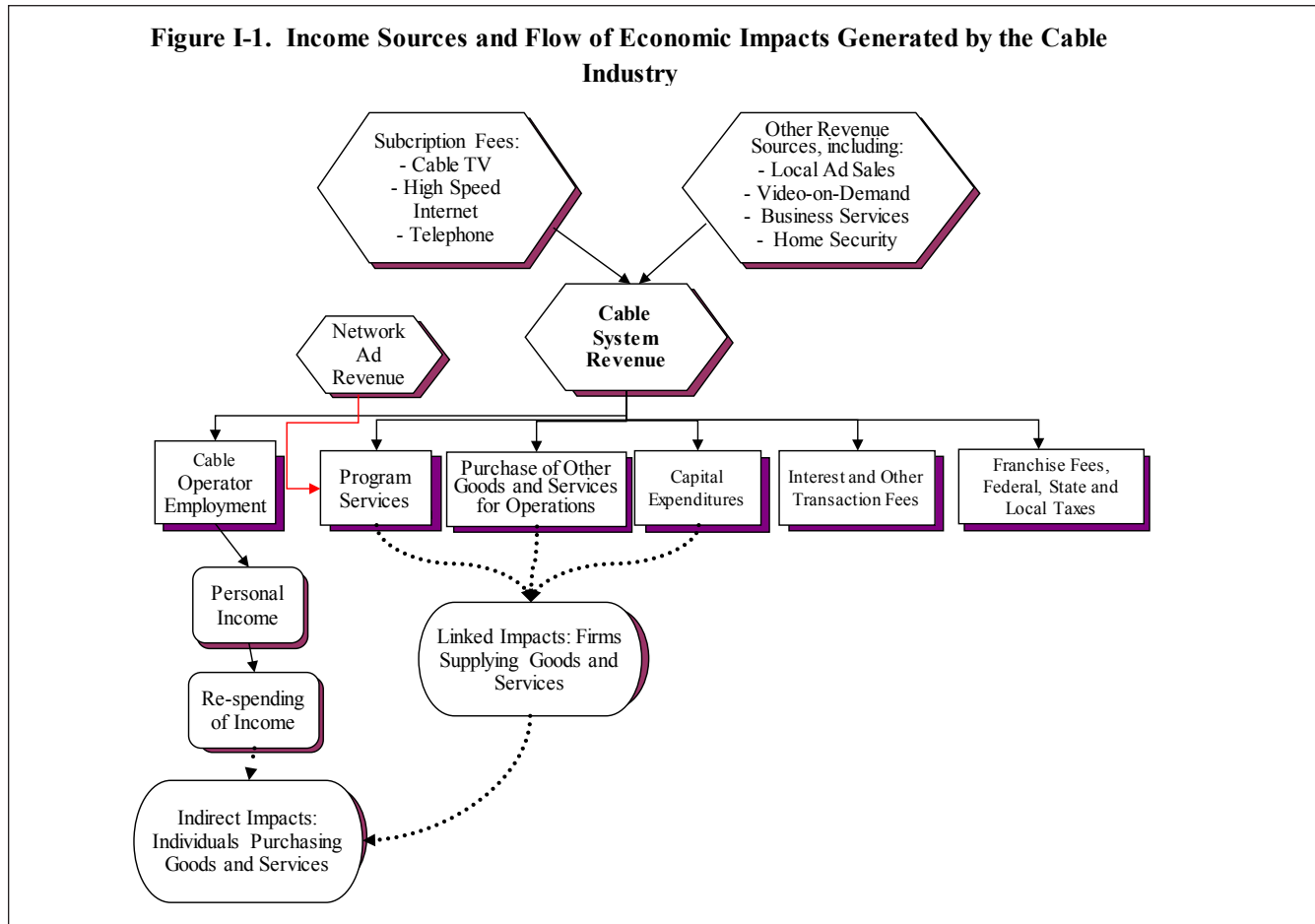
Bortz Media's impact estimation methodology is described in greater detail in Appendix A. Briefly, Bortz Media developed estimates of cable operator industry financial flows (including both direct and linked economic activity) and allocated these flows into more than 40 separate economic sectors. Aggregate economic effects attributable to these financial flows were then estimated using multipliers obtained from the Regional Input-Output Modeling System (known as RIMS II) developed by the Bureau of Economic Analysis at the U.S. Department of Commerce. RIMS II provides a comprehensive tool for quantifying the linkages between economic sectors and estimating aggregate economic impacts.

**The program network industry.** As indicated above, the subscription TV program network industry is both a key supplier to the cable operator industry and a substantial industry in its own right. In this report, Bortz Media has evaluated the program network industry on both levels – first considering the industry in its supplier role and its resulting contribution to the total economic impact of the cable operator industry (in Section II),

and subsequently evaluating the direct, linked and total economic impacts specifically attributable to the program network industry (in Section III). The methodology employed to estimate the impact of the program network industry is essentially the same as that used in evaluating the cable operator industry's impact.

## Cable Operator Industry Structure and Financial Flows

Figure I-1 depicts the overall structure of the cable operator industry and the resulting flow of economic impacts generated by the industry. As the figure indicates, the cable operator industry captures subscription and other revenues from the sale of television, high-speed Internet access, telephone and other services to both residential and business customers. In addition, both cable operators and program networks generate revenue from the sale of advertising, although most of these advertising revenues go directly to the program networks.



Cable operator industry revenues, and the four main ways they are spent to deliver cable services, are reviewed in the remainder of this section:

**System operations.** The majority of the cable operator industry's impact is attributable to revenues and expenditures by the more than 3,000 local cable facilities serving communities throughout the U.S. Revenues generated by these systems are estimated to have exceeded \$131 billion in 2018, up from \$123.5 billion in 2016 and more than seven times the industry's revenues in 1990:<sup>1</sup>

<sup>1</sup> Revenues for 1990, 2002, 2007, 2010, 2012, 2014, 2016 and 2018 are Bortz Media estimates; revenues for 1996 are based on Kagan World Media, Broadband Cable Financial Databook 2002, p. 7.



**Table I-1. Growth in Cable System Revenues, 1990-2018**

<b>Year</b>	<b>Cable System Revenues (Billions)</b>
1990	\$17.3
1996	26.9
2002	48.2
2007	78.6
2010	94.4
2012	104.5
2014	110.2
2016	123.5
2018	131.6

These revenues primarily consist of subscription fees paid by consumers and businesses for video programming, high-speed Internet access, telephone services, and related equipment. Just under five percent of operator revenues) come from the sale of national, regional and local advertising.

These revenues are utilized to compensate employees and to purchase goods and services necessary to operate the business (e.g., programming, system power and other utilities, pole and conduit rental, etc.). Funds remaining after direct operating expenses (termed “operating cash flow” or “EBITDA”) are available for interest payments, taxes, capital expenditure investment and distribution. (As discussed further below, the cable operator industry has in recent years, including 2018, invested a substantial percentage of the industry’s operating cash flow in capital expenditures.

Table I-2 below summarizes the flow of funds from operations during 2018 and compares this to 1990, 2002, 2007, 2010, 2012, 2014 and 2016:<sup>2</sup>

**Table I-2. Cable System Funds Flow Comparison, 1990-2018**

	<b>Billions</b>							
	<b>1990*</b>	<b>2002</b>	<b>2007</b>	<b>2010*</b>	<b>2012*</b>	<b>2014</b>	<b>2016</b>	<b>2018</b>
Operating Revenues	\$17.3	\$48.2	\$78.6	\$94.4	\$104.5	\$110.2	\$123.5	\$131.6
Operating Expenses	2.8	30.4	48.7	58.1	64.8	68.3	76.6	80.3
Operating Cash Flow/EBITDA	\$7.4	\$17.8	\$29.9	\$36.4	\$39.7	\$41.9	\$46.9	\$51.3
<u>Operating Margin</u>	43.0%	36.9%	38.0%	38.5%	38.0%	38.0%	38.0%	39.0%

\*Column does not add to total due to rounding.

These estimates reflect operations at both the system and corporate/headquarters levels.

**Capital expenditures.** Capital expenditures by cable operators reflect several types of activity, including upgrading of systems (to increase capacity and support new services), new construction (extending service to additional homes and businesses), purchase of customer premise equipment (e.g., digital set-top boxes, cable modems, telephone network interface units, etc.) and maintenance.

<sup>2</sup> Bortz Media estimates are based on operating data for public cable companies; Federal Communications Commission (FCC), *Annual Assessment of the Status of Competition in the Market for the Delivery of Video Programming*, December 31, 2007; and Kagan World Media, *Broadband Cable Financial Databook 2002*, p. 144.

The cable operator industry is capital intensive by nature, and the industry’s focus on upgrading its network infrastructure and deploying new services that require the placement of new technology in customers’ homes has necessitated consistently large capital expenditures. In 2018, Kagan – S&P Global estimates that cable operator capital investment totaled \$30.8 billion.

**Financing activities.** Cable-related financing activities result in additional expenditures and economic impacts not accounted for in estimates of either system operations or capital spending. Financial transactions encompass both capital formation (i.e., debt and equity financing) and the purchase and sale of cable properties. In addition, the cable operator industry makes substantial interest payments annually on its outstanding debt.<sup>3</sup>

**Cable network advertising.** “Basic” programming networks, such as ESPN, TNT and CNN, generate revenues from two primary sources – license fees paid by multichannel video distributors (i.e cable operators, satellite operators, and other distributors) and the sale of advertising. Operator license fees are accounted for in the cable system operating expenses set forth earlier. In contrast, advertising revenues of the basic networks (and other, smaller network revenue streams such as revenues derived from the syndication of programming) represent an additional source of funding for these programming services.

Growth in the number of networks, the number of households served by individual networks, and the aggregate audience attracted by those networks have contributed to corresponding growth in gross cable network advertising revenues. Since 1990, gross cable network ad revenues have increased from less than \$2 billion to nearly \$32 billion:<sup>4</sup>

**Table I-3. Growth in Cable Network  
Gross Advertising Revenues, 1990-2018\***

<b>Year</b>	<b>Cable Network Gross Advertising Revenues (Billions)</b>
1990	\$1.9
1996	5.1
2002	11.2
2007	19.9
2010	23.0
2012	26.8
2014	29.0
2016	30.2
2018	31.7

\*These revenues reflect payments made directly to cable programming networks by advertisers. They are separate and distinct from the local advertising revenues generated by cable system operators, which are estimated to have totaled about \$6.2 billion on a gross basis during 2018.

Advertising revenues generated by cable networks are a function of the networks’ total reach, including households receiving the networks from other, competing distributors. For the purpose of this analysis, Bortz Media estimates that just over 53 percent of network advertising revenues can be attributed to the distribution provided by the cable operator industry.

<sup>3</sup> Bortz Media estimates, based on public company data, that approximately \$8.8 billion in interest payments were made during 2018.

<sup>4</sup> Bortz Media estimates for 2018 based on data from S & P Global Intelligence. Historical data based on SNL Kagan, *Economics of Basic Cable Networks*, 2016 Edition, and *Media Trends*, 2010 Edition; and estimates of revenues generated by regional sports and news networks.

## Cable Operator Industry Suppliers

Cable operator expenditures during 2018 included more than \$80 billion in operating expenses, more than \$16 billion in domestic capital expenditures<sup>5</sup> and approximately \$500 million in commissions and other fees associated with operator financing activities. More than \$22 billion of these expenditures (or roughly 24 percent) are paid directly to cable operator industry employees in the form of wages and other compensation, while \$68 billion is used to purchase goods and services from industry suppliers. In addition, advertising revenues flowing to program networks (and related commissions to advertising agencies) as a result of distribution via cable system operators approximated \$18 billion in 2018.

Cable operator industry suppliers are found throughout most major sectors of the national economy. The estimated overall distribution of 2018 cable expenditures among the various major economic sectors is summarized below, followed by a brief description of the principal suppliers represented within each sector.

**Dollar flows.** As summarized above, Bortz Media estimates that total cable-related dollars flowing to firms directly supplying goods and services to cable operators approximated \$86.2 billion during 2018.<sup>6</sup>

<b>Economic Sector</b>	<b>2018 Linked Supplier Revenues (Billions)*</b>
Utilities	\$1.26
Construction	7.35
Manufacturing	10.99
Transportation/Warehousing	0.15
Wholesale and Retail Trade	4.21
Information	48.01
Finance/Insurance	1.24
Real Estate	4.72
Prof./Mgmt./Admin. Services	8.10
Arts/Ent./Rec./Other Services	0.10
<b>TOTAL</b>	<b>\$86.15</b>

\*Column may not add to total due to rounding.

**Information.** The information sector obtains by far the largest revenues from the cable operator industry, due primarily to the more than \$31 billion paid to program networks in the form of license fees and another \$14 billion in cable-attributable advertising revenues generated directly by the networks.

**Construction.** Expenditures by cable operators in this sector, which are estimated at \$7.4 billion for 2018, are used primarily to acquire labor and services connected with equipment installation, system upgrades and line extensions (i.e., the deployment of the cable network infrastructure to new or previously unserved buildings and housing developments).

5 This figure is smaller than the total capital expenditure estimates discussed elsewhere in this report due to the exclusion of the portion of capital investment that is spent outside the U.S. (Cable operators purchase the bulk of their equipment and materials from U.S.-based companies. However, certain electronics and other components are manufactured outside the U.S.)

6 Total linked economic activity is the sum of cable operator expenses (including domestic capital investment and fees related to financing activities) plus the cable-related advertising revenues of basic cable networks, less direct employee compensation, bad debt, certain taxes and other payments to governmental entities. Distribution by sector is a Bortz Media estimate based on the NAICS classification format of the U.S. Department of Commerce. Our use of the NAICS format (adopted in 1997 to replace the historical Standard Industrial Classification or SIC) is discussed in more detail in Appendix A.

**Manufacturing.** The bulk of cable capital expenditures (as well as some maintenance and replacement-related operating expenses) go toward the purchase of subscriber equipment – including digital set-top boxes, cable modems and telephone network interface units – and “network” products including fiber optic and coaxial cable, head-end equipment and node electronics.

As discussed earlier in this section, the vast majority of cable operator industry purchases of this type are from U.S.-based manufacturers. However, the actual fabrication and assembly of many of these products occurs outside of the United States. Even so, we estimate that expenditures remaining in the U.S. amounted to approximately \$11.0 billion in 2018.

**Wholesale and retail trade.** Cable operators are estimated to have purchased \$4.2 billion in wholesale and retail goods and services during 2018. Most of these expenditures are for the typical materials and supplies necessary to run a business, including paper products, printed marketing materials, fuel for company vehicles, etc. Cable operator purchases from wholesalers of cable-specific equipment could not be broken out and are therefore included in the manufacturing sector.

A specific note with respect to retail sales is the cable operator industry’s provision of home shopping program services including QVC Network and HSN. U.S. retail sales of these companies during 2018 are estimated to have amounted to nearly \$9 billion. These sales (and their resulting economic impacts), while achieved in large part through the subscription TV medium, are not directly accounted for in this study.<sup>7</sup>

**Real estate.** Cable operator industry expenditures flowing to the real estate sector consist primarily of rental payments associated with land, office space and other facilities used by cable providers. These facilities are located throughout the country, and payments are spread among many different firms. Expenditures during 2018 are estimated to have totaled \$4.7 billion.

**Professional/technical/management/administrative services.** Cable operator industry payments to services firms in 2018 amounted to \$8.1 billion. Commissions to advertising agencies and rep firms were the largest single services category, accounting for almost half of this total. Other major categories included data processing services, legal, IT and accounting services, and collections.

**Summary.** More than \$86 billion flowed directly to cable operator industry suppliers during 2018. The employment and personal income created by these expenditures and the subsequent economic impacts resulting from the flow of these dollars throughout the U.S. economy are described in Section II.

## Program Network Industry Structure and Financial Flows

The program network industry’s role as a supplier to the cable operator industry is reflected in the preceding discussion. Even so, the program industry has experienced dramatic growth and exerts its own substantial economic impact. Its operational and financial characteristics are briefly summarized below as a prelude to the economic impact discussion in Section III.

**Industry structure.** There are two primary categories of subscription TV program networks:

- “Basic” networks. Networks in this category are typically combined with a large number of other networks as part of one or more subscription packages offered by cable operators and other distributors. The basic networks generally derive revenue from two principal sources – license fees charged to distributors for the right to carry the network, and advertising revenues. Some of these networks, such as CNN, ESPN, and The Discovery Channel, are national while networks such as Fox Sports West and MSG Network are regional sports networks.

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<sup>7</sup> While made possible by distribution on cable systems, these retail sales involve finished products developed and manufactured by other industries. As such, it was determined that these sales should be excluded from the analysis.

- “Premium” networks. The HBO, Showtime and Starz families of networks are examples of networks in the premium category. Distributors charge a retail subscription fee for these networks and share a portion of this fee with the networks. In general, these networks are not advertiser-supported.

The program network industry also includes out-of-market premium sports packages and entities that assemble programming for sale on a video-on-demand or pay-per-view basis.

**Operations and financial flows.** The program network industry generated almost \$90 billion in net domestic revenues in 2018, with operating expenses of \$57 billion. Four-fifths of the industry’s operating expenses went directly toward the creation or acquisition of programming:

**Table I-5. Program Network Funds Flows, 2018\***

	<b>Billions</b>		
	<b>Basic Networks</b>	<b>Premium/ VOD/PPV</b>	<b>Total</b>
Operating Revenues**	\$77.3	\$12.4	\$89.8
Operating Expenses:			
Programming/Production	\$39.9	\$6.5	\$46.4
All Other	<u>8.3</u>	<u>2.3</u>	<u>10.6</u>
Subtotal	\$48.2	\$8.8	\$57.0
Operating Cash Flow/EBITDA	\$29.1	\$3.6	\$32.8
Operating Margin	37.7%	29.0%	36.5%

\*Columns and rows may not add to totals due to rounding.

\*\*Net of agency commissions.

In addition, the industry was responsible for over \$4.7 billion in advertising agency commissions in 2018.

## SECTION II. ECONOMIC IMPACTS OF THE CABLE OPERATOR INDUSTRY

This section summarizes the impacts of the cable operator industry on the United States economy in terms of jobs, personal income and total economic activity. Direct, linked and total impacts are analyzed.

### Direct Impacts

Direct economic impacts include the jobs and personal income provided by the more than 3,000 cable systems operating in the United States, as well as the regional and corporate offices of the MSOs that manage most of these systems.

**Employment.** Bortz Media has compiled information on cable operator employment from several sources, including public cable company reports and presentations, analysis of key industry ratios/benchmarks such as the ratio of subscribers per employee, and responses of several major MSOs to a survey developed for the purpose of this study. Based on these data, Bortz Media estimates that 2018 cable operator employment approximated 264,100, up from 255,600 in 2016. *This reflects the creation of nearly 90,000 net new cable operator industry jobs since 2002.*

Growth over recent years results from significant structural changes in the industry, attributable to the extensive marketing of digital cable and high-speed Internet access services, the widespread deployment of residential telephony and the more recent emphasis on providing business services and home security. Each of these new services is labor intensive, requiring incremental sales, installation, customer service and technical/maintenance personnel. As a result, the ratio of subscribers per employee has declined steadily over the last few years. Stated another way, proportionately more cable personnel are now required to support the increasing array of services offered to an individual subscriber.

**Direct employee compensation.** Direct cable operator employee compensation (including payroll tax payments, as well as capitalized in-house labor) is estimated to have totaled \$22.8 billion for 2018, up from \$22 billion in 2018. Excluding capitalized labor costs, employee compensation accounts for approximately 27 percent of cable operator industry operating expenses.

### Linked Economic Activity

As noted in Section I, linked economic activity encompasses the jobs, income and related economic effects of firms supplying goods and services to cable system operators. Based on the dollar flows from the cable operator industry to these firms (see Section I), the cable-related activities of cable operator industry suppliers are estimated to have accounted for over 165,000 jobs and \$18.3 billion in employee compensation during 2018 (as summarized on the next page in Table II-1).

The manufacturing, information and professional/management/administrative services sectors each provide 39,000 or more cable-related jobs. The high-paying information sector (which includes program networks) is the largest linked supplier category in terms of employee compensation, with approximately \$7.1 billion in cable-related compensation.

**Table II-1. Cable Industry Linked Supplier Employment  
and Employee Compensation, 2018**

<b>Economic Sector</b>	<b>2018 Linked Suppliers</b>	
	<b>Employment*</b>	<b>Employee Compensation (Millions)*</b>
Utilities	1,150	\$170
Construction	28,430	2,180
Manufacturing	39,180	3,310
Transportation/Warehousing	830	70
Wholesale and Retail Trade	6,460	450
Information	39,590	7,140
Finance/Insurance	1,540	170
Real Estate	6,010	440
Prof./Mgmt./Admin. Services	41,370	4,320
Arts/Ent./Rec./Other Services	700	60
<b>TOTAL</b>	<b>165,280</b>	<b>\$18,300</b>

\*Column may not add to total due to rounding.

## Combined Direct and Linked Impacts

Combining direct and linked employment provides a particularly useful depiction of “the cable operator industry” (i.e., the employment and income generated by cable operators and their immediate suppliers of goods and services). In 2018, total employment on this basis approached 430,000, as compared to 417,000 in 2016, while compensation of those employees increased by \$2 billion from 2016, to over \$41 billion:

**Table II-2. Cable Industry Combined Direct  
and Linked Impacts, 2018**

	<b>Direct Plus Linked Impacts</b>
Employment	429,380
Employee Compensation (Millions)	\$41,100

## Total Economic Impacts

Total economic activity associated with the cable operator industry extends far beyond the direct and linked impacts summarized above. As noted in Section I, additional economic effects are created by:

- Purchases of goods and services by firms that supply to the cable operator industry (intermediate effects); and
- Purchases of goods and services by individuals employed as a result of the cable operator industry (induced effects).

The total impacts attributable to the industry can be measured in the form of job creation and resulting personal income, as well as in the form of total output. As described further in Appendix A, estimation of these total impacts derives from the application of economic impact multipliers – in this case, multipliers developed by the Bureau of Economic Analysis of the U.S. Department of Commerce.

**Employment and income.** Total employment associated with the cable operator industry during 2018 (including direct, linked and indirect effects), is estimated at 2.37 million. Total 2018 earnings attributable to the industry were more than \$114 billion:

<b>Economic Sector</b>	<b>2018 Total Impacts</b>	
	<b>Employment</b>	<b>Earnings (Millions)**</b>
Agriculture/Mining	8,700	\$320
Utilities	17,500	970
Construction	182,100	8,050
Manufacturing	218,500	10,500
Transportation/Warehousing	19,300	850
Wholesale and Retail Trade	141,000	5,650
Information	975,000	53,270
Finance/Insurance	75,800	3,190
Real Estate	52,300	1,440
Prof./Mgmt./Admin. Services	243,600	10,430
All Other Services	126,100	4,740
Public Administration	310,000	14,750
<b>TOTAL</b>	<b>2,369,900</b>	<b>\$114,150</b>

\* As noted above and in Appendix A, total impacts combine direct, linked and indirect impacts. Estimates of indirect impacts (or "re-spending effects") are derived by applying multipliers for each industry sector to Bortz Media estimates of direct impacts.

\*\*Column may not add to total due to rounding.

The information sector (which includes the cable operator industry’s direct employment and compensation impacts) is by far the largest sector in terms of cable-induced employment. The greater relative importance of the trade sector in comparison with the distribution of linked supplier impacts is a function of personal consumption patterns, which account for a significant portion of indirect economic impacts.

**Output.** Economic output impacts (as estimated in this report) reflect the total value of all cable-related transactions as they occur throughout the economy. Specifically, gross output measures the sum of the revenue received by firms at each step in the distribution process.<sup>8</sup> The gross 2018 output associated with the cable operator industry is estimated at \$373 billion, up from \$348 billion in 2016. [See Table II-4.]

8 By way of example, assume that the raw materials (or components) used in a digital cable set-top box are sold to a manufacturer for a total of \$25, the manufacturing process for the unit contributes an additional \$75 in “value-added” (resulting in a wholesale price of \$100), and the final “retail” price to the cable operator is \$200. In this case, gross output is the sum of all three “prices” charged for the product at the three steps in the distribution chain, or \$325.



## Impacts by State and Congressional District

Bortz Media also estimated cable operator employment and economic impacts by state and Congressional District. Estimates of employment and impact for each state and District are set forth in Appendix B.

Employment estimates are derived from zip code level employment data provided by individual cable operator companies. Determining impacts in each state and District is more complex and cannot be estimated with precision without evaluating whether dollars spent in a particular location go to suppliers in the same location. For purposes of this analysis, Bortz Media estimates state and District level impacts assuming all dollars spent by the local cable system remain within the state or District. This method allocates the full level of total industry impacts – but does not account for the fact that some states and Districts receive substantial net inflows of cable dollars while others experience substantial net outflows. Impacts are therefore understated in some states and Districts and overstated in others.

Despite these limitations, our analysis confirms that the cable operator industry’s localized structure results in significant employment and economic impacts in every state and Congressional District. A few key findings include:

*Direct cable employment.* Bortz Media’s analysis indicates that at least 300 direct cable operator industry employees reside in every Congressional District. Further, there are 55 Districts with more than 1,000 cable employees and eight with more than 2,000.

*Employment impacts.* Using the total impact approach, the industry is responsible for at least 2,700 jobs in each District, and upwards of 5,000 jobs in 150 Districts.

## Cable Operator Industry Growth: 2002–18

The cable operator industry has experienced substantial growth over the last decade and a half<sup>9</sup>. Direct and linked employment attributable to the cable operator industry has grown from 307,000 employees in 2002 to over 429,000 in 2018. Similarly, total employment impacts (including indirect effects) have increased from 1.1 million employees (2002) to nearly 2.4 million for 2018. Similar growth patterns are evident in other major measures of the industry’s impact:

Table II-4. Cable Industry Growth Indicators, 2002-2018

Economic Indicator	Year							Absolute Growth	Percent Change: 2002-2018
	2002	2007	2010	2012	2014	2016	2018		
Cable Operator Direct Impacts:									
Revenues	\$48.2	\$78.6	\$94.4	\$104.5	\$110.2	\$123.5	\$131.6	\$83.4	173%
Employment	176,000	229,000	233,700	235,100	248,900	255,600	264,100	88,100	50%
Employee Comp. (Billions)	\$8.9	\$14.3	\$17.3	\$19.9	\$20.4	\$22.0	\$22.8	\$13.9	156%
Direct plus Linked Supplier Impacts:									
Employment	307,200	365,300	369,300	381,300	403,900	416,900	429,380	122,180	40%
Employee Comp. (Billions)	\$16.2	\$23.4	\$28.4	\$33.1	\$35.9	\$39.1	\$41.1	\$24.9	154%
Total Economic Impacts:									
Employment	1,134,400	1,501,200	1,771,900	1,958,500	2,124,700	2,331,000	2,369,900	1,235,500	109%
Earnings (Billions)	\$42.3	\$61.9	\$76.7	\$89.2	\$97.1	\$106.2	\$114.2	\$71.9	170%
Gross Output (Billions)	\$173.4	\$226.7	\$251.2	\$291.4	\$317.8	\$347.9	\$372.6	\$199.2	115%

The cable operator industry’s direct employment gain of nearly 90,000 net new jobs from 2002 to 2018 represented over 0.5 percent of all net U.S. jobs added during that period.

<sup>9</sup> Changes in NAICS industry classifications necessitated certain methodical changes for the 2007 and 2010 studies as compared with the 2002 study. As such, comparisons of specific job classifications between the two studies should be viewed with caution. Even so, Bortz Media believes broad trend comparisons such as those described here are representative of the growth in the industry’s overall economic impact.

## SECTION III.

# ECONOMIC IMPACTS OF THE PROGRAM NETWORK INDUSTRY

The program networks that represent the key suppliers to the cable operator industry comprise a substantial industry in their own right – and their economic impact is only partially reflected in the total impacts calculated in Section II. This section details the direct and total impacts of the subscription program network industry on the United States economy in terms of jobs, personal income and total economic activity.

### Direct Impacts

Direct economic impacts include the jobs and personal income provided by the nearly 1,100 basic and premium program networks operating in the United States, including regional networks serving particular segments of the country.

**Employment.** Bortz Media has compiled information on program network employment primarily from responses to surveys of major program network groups developed for the purpose of this study. In addition, several other sources have been reviewed including public company reports and presentations, analysis of key industry ratios/benchmarks such as the ratio of revenues per employee, and Bortz Media’s own experience in developing staffing plans for start-up networks. Based on these data, Bortz Media estimates that 2018 program network employment approximated 61,100. This represents an increase of about 2,000 employees since 2016 and about 10,400 net new jobs since 2010.

**Direct employee compensation.** Program network industry employees are highly compensated, with compensation in 2018 estimated to average approximately \$180,000 per employee. Direct program network employee compensation is therefore estimated to total \$11.0 billion for 2018. Employee compensation accounts for about 18 percent of program network operating expenses.

### Linked Economic Activity

As noted in Section I, linked economic activity encompasses the jobs, income and related economic effects of firms supplying goods and services to program networks. An in-depth examination of program network linked supplier activity was beyond the scope of this assessment. However, because program network expenditures are heavily concentrated on the suppliers of the programming content that the networks provide, it is useful to consider the relationship between the program networks and two key supplier segments – the studio/production industry and the sports industry.

**The studio/production segment.** For the studio/production industry, the importance of basic and premium networks as distribution outlets continues to increase. Whereas subscription TV was originally a secondary distributor (i.e., programming premiered on an alternative distribution vehicle), it has increasingly assumed a primary role. Major, award-winning original series such as *Game of Thrones*, *The Americans*, *The Walking Dead*, *Killing Eve* and *Power* have become a core part of the basic and premium network landscape, as have acclaimed original movies and mini-series’ such as *The Assassination of Gianni Versace: American Crime Story*, *Big Little Lies*, and *Escape at Dannemora*. Cable networks are also home to popular reality series’ including *Love & Hip Hop Miami*, *Gold Rush* and *Curse of Oak Island*.

Within the program syndication marketplace, basic networks are increasingly the primary outlets for off-network hour series such as *NCIS*, *Chicago P.D.* and *NCIS: Los Angeles*, as well as increasingly a primary outlet for half-hour series such as *The Big Bang Theory*, *Modern Family* and *Brooklyn Nine Nine* – oftentimes bypassing the traditional run on local over-the-air stations.

Finally, premium as well as basic networks continue to invest heavily in the acquisition of feature films.

Sports. Basic and premium program networks continue to offer an increasing number of sports events. The growth of sports on subscription TV networks is driven by investment in high-profile sports content by national networks such as ESPN and ESPN2, TNT, TBS, NBC Sports Network and FOX Sports 1 and HBO; the continued growth of regional sports networks; and the ongoing development of networks dedicated to the delivery of college athletics and/or specific types of sports (e.g. MLB Network, Tennis Channel, and the Big Ten Network).

**Monetary flows.** Program network spending on the production and acquisition of content is estimated to have totaled \$46.4 billion during 2018. Bortz Media estimates the distribution of program network expenditures to be as follows:

**Table III-1. Program Network  
Production and Acquisition Expenditures, 2018**

	<b>Billions</b>
Basic Networks	\$39.9
Premium Networks	4.1
Pay-Per-View/VOD Services	<u>2.4</u>
<b>TOTAL</b>	<b>\$46.4</b>

A portion of these programming dollars are spent internally by the program networks. For example, the production costs associated with the news programming of CNN, CNBC, MSNBC, Fox News Channel and others are included in these estimates. However, Bortz Media estimates that over \$23 billion flows to the motion picture studios and other members of the production community. In addition, an estimated \$14.5 billion is paid to holders of sports rights.

**Employment and income.** The dollar flows described above stimulate employment and personal income in the program production/distribution and sports sectors of the economy. Based on Department of Commerce data for these sectors, the program network industry is responsible for over 62,000 jobs in the motion picture and video industry sector as well as almost 21,000 sports industry employees. These program network-related employees receive compensation totaling \$5.2 billion (production) and \$9.3 billion (sports):

**Table III-2. Program Network Industry Production and Sports Links, 2018**

	<b>2018 Sector Links</b>	
	<b>Sports Teams &amp; Clubs</b>	<b>Motion Picture &amp; Video Industries</b>
Revenues (Millions)	\$14,460	\$23,170
Employment	20,900	62,200
Employee Compensation (Millions)	<u>\$9,270</u>	<u>\$5,150</u>

Supported by rapidly growing revenues received from program networks, program network attributable employment in these two sectors is estimated to have increased by nearly 30,000 jobs since 2007.

## Total Economic Impacts

Total economic activity associated with the program network industry extends far beyond the direct and linked impacts summarized above.<sup>10</sup> As noted in Section I, additional economic effects are created by:

- Economic activity generated by the purchase of goods and services by firms that supply to the program network industry (intermediate effects); and
- Economic activity stimulated by the purchase of goods and services by individuals employed as a result of the program network industry (induced effects).

The total impacts attributable to the industry can be measured in the form of job creation and resulting personal income, as well as in the form of total output. As described further in Appendix A, estimation of these total impacts derives from the application of economic impact multipliers – in this case, multipliers developed by the Bureau of Economic Analysis of the U.S. Department of Commerce.

Total employment associated with the program network industry during 2018 (including direct, linked and indirect effects), is estimated to be 1.3 million, an increase of 30,000 jobs since 2016 and an increase of 530,000 jobs since 2007. Total 2018 earnings attributable to the industry were over \$46 billion:

	Year						Change: 2007-2018
	2007	2010	2012	2014	2016	2018	
Employment	767,000	854,000	980,000	1,138,000	1,261,000	1,297,000	530,000
Earnings (Billions)	\$29.8	\$31.7	\$35.8	\$41.3	\$45.3	\$46.4	\$16.6
Gross Output (Billions)	\$100.7	\$108.1	\$123.4	\$141.7	\$154.8	\$157.2	\$56.5

As discussed previously, economic output impacts (as estimated in this report) reflect the total value of all program network-related transactions as they occur throughout the economy (i.e., the sum of the revenue received by firms at each step in the distribution process). The gross 2018 output associated with the program network industry is estimated at over \$157 billion.

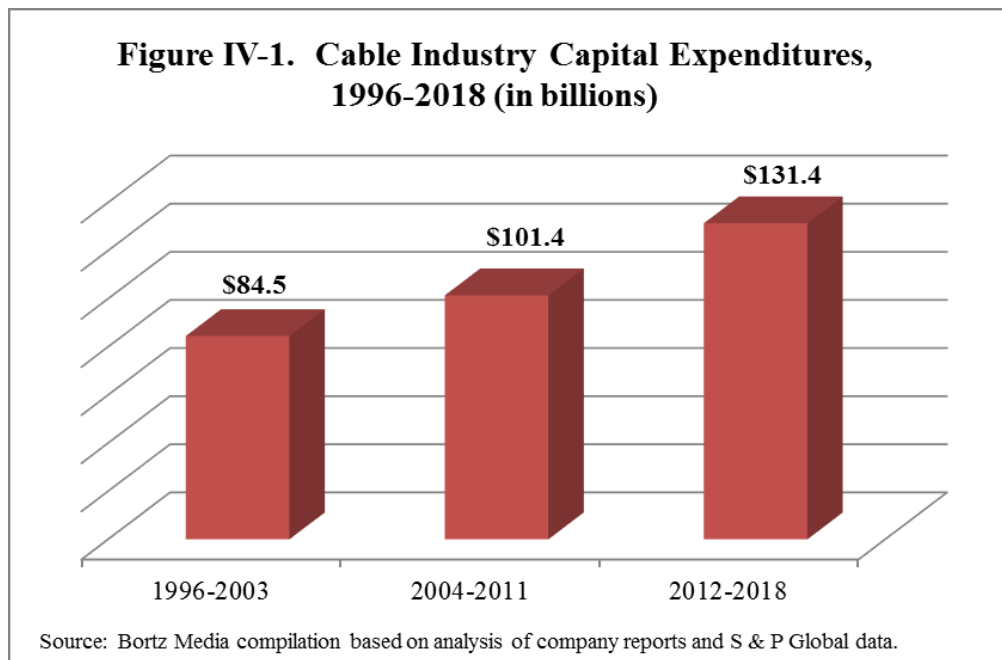
<sup>10</sup> The total impacts detailed below accurately reflect the economic impacts of the program network industry. However, since the program network industry is a supplier to the cable industry, a portion of the program network industry's total impacts are also subsumed in the total impacts estimated for the cable industry. As such, the total impacts for the two industries as presented in this report are not additive.

## SECTION IV. OTHER CABLE OPERATOR AND PROGRAM NETWORK INDUSTRY PERSPECTIVES

The first three sections of this report detail the impact of the cable and program network industries on the United States economy, focusing on the creation of jobs and income and contributions to the nation’s economic growth. This section highlights many other impacts of the two industries – including the cable industry’s critical role in investing in U.S. infrastructure, in creating a competitive telecommunications marketplace, and in stimulating the emergence of an increasingly “broadband society” in the United States. In addition, this section looks at the profound impact of both industries on American television viewing habits and the development of new and innovative television programming. Finally, this section reviews the substantial monetary and non-monetary contributions of both segments to the communities they serve.

### The Cable Industry: Capital Investment Fostering Competition

Cable operators engage in a capital-intensive business that requires substantial investment to maintain and upgrade the extensive network infrastructure used to provide service, with total expenditures over the past two decades approximating \$300 billion. Notably, the industry has spent more than \$20 billion in each of the last two years and more than \$17 billion in each of the last five years, shifting its capital and operating focus toward competitive service implementation, the introduction of innovative service applications, and equipping homes with the technological tools and capabilities needed to make the most of their entertainment, information and communications options.



The majority of the cable industry’s capital investment is made at the local level and about one-quarter of the industry’s total investment represents capitalized labor, which equates to local jobs – the majority of which are local contractors.

In fact, top cable companies have consistently been recognized as “Investment Heroes” in an annual report by economists at the Progressive Policy Institute measuring the volume of domestic capital expenditures by U.S.

companies.<sup>11</sup> Emphasizing the role that long-term capital investment plays in helping to raise both productivity and wages (and in creating jobs) across the country, the authors included Comcast (fourth) and Charter Communications (sixth) among the top 10 U.S. companies that made the greatest investments domestically in buildings, equipment and infrastructure.

While substantial, neither the dollar amounts nor the recognition described above fully capture the impact that the cable industry has had in driving the adoption of broadband Internet access in this country, in opening the nation's telephone market to true competition at the residential level, and in fostering innovation in electronic entertainment. Moreover, the cable operator industry's recent gains in the business services segment are creating additional competition in this arena as well.

The services made possible by the cable industry's innovation and investment are reviewed in more detail below.

**Advanced video services.** As of 2018, over 98 percent of all cable TV customers subscribed to digital cable service, up from 80 percent in 2012, 60 percent in 2007 and about 30 percent in 2002.<sup>12</sup> This represents more than 50 million digital cable customers. Digital cable (and the sophisticated settop boxes that accompany it) has in turn facilitated the provision of an array of advanced services to digital subscribers as well as the increasing availability of programming services on other media platforms.<sup>13</sup>

**Video-on-demand (VOD).** Nearly all digital cable customers have access to extensive libraries of VOD programming offered by cable. The Video Advertising Bureau (VAB) reports that cable operators make an average of more than 93,000 VOD titles available to their subscribers every month – far more than online competitors Netflix, Hulu and Amazon.<sup>14</sup>

**Digital video recording (DVR).** As of the end of 2018, it is estimated that more than 21 million cable customers (or 42 percent of cable homes) had DVR service. This is more than double the number of cable DVR customers at the end of 2007. DVR capability has significantly altered the way viewers watch television – enabling programs to be recorded and viewed at times more convenient to the customer, while also allowing programs to be paused and replayed when viewed “live.”

**High-definition television (HDTV).** More than 41 million cable homes had HD-enabled set-top boxes as of the end of 2018, a substantial increase from 26 million in 2010 and 13 million in 2007.

**TV Everywhere.** In their ongoing efforts to extend and reinforce the value of their service to customers, cable operators have established agreements with programmers to make content available on multiple platforms such as personal computers, laptops and mobile devices. Well over half (56 percent) of subscription TV customers use TV Everywhere apps on a monthly basis.

**High-speed Internet service.** The cable industry's bold (and unquestionably risky) infrastructure commitment in the latter half of the 1990s enabled it to “take the early lead” in the broadband services market and to attract more than 66 million high-speed Internet customers as of year-end 2018.<sup>15</sup>

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11 Dr. Michael Mandel and Elliott Long, *Progressive Policy Institute*, “Investment Heroes 2018: Encouraging and Diffusing Innovation Throughout the Economy”, November 2018.

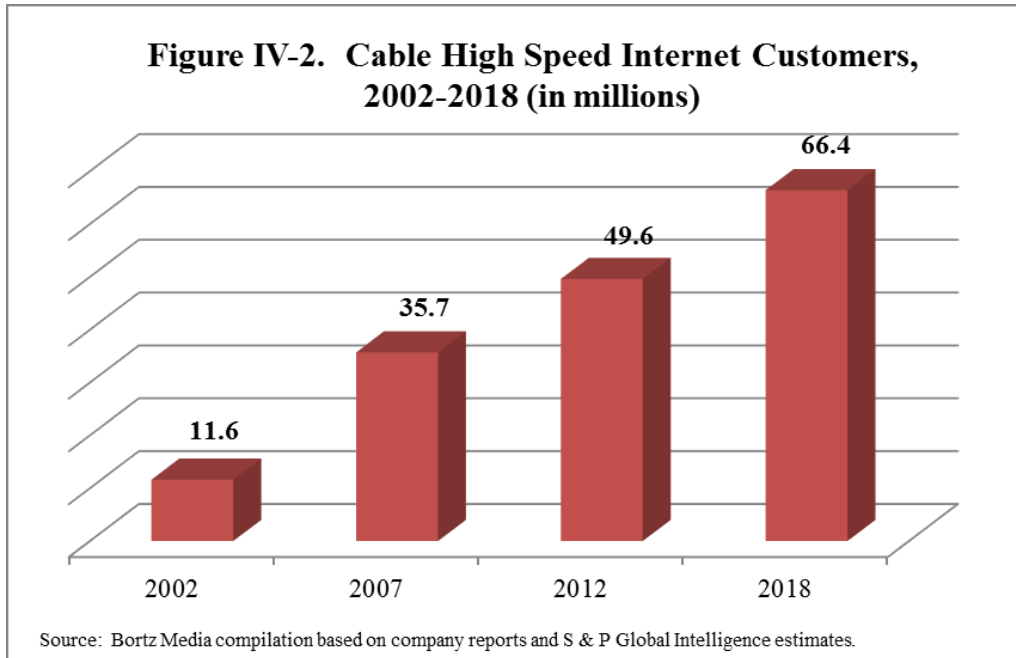
12 Bortz Media estimates based on cable company reports and S & P Global data.

13 Except as otherwise noted, data presented below is from S & P Global Market Intelligence and/or NCTA.

14 Video Advertising Bureau, *Tailor-Made Television: VOD*, 1Q '18 Report, p. 8.

15 Bortz Media estimate based on company data.

By investing earlier than their principal competitors, cable operators brought broadband service to prospective customers sooner than would otherwise have been the case – giving consumers the opportunity to realize the benefits of the service and “proving” that a market existed for faster speeds. Equally important, it forced a competitive response from initially reluctant regional telephone incumbents, which ultimately resulted in most U.S. households now having access to broadband services from at least two experienced and reliable service providers. Moreover, by continually pressing its technological advantage and increasing its broadband speeds, cable forced a further response from the telephone industry in the form of increased DSL capabilities and substantial investments in fiber optic infrastructure.



Moreover, as indicated below, the cable industry’s commitment has led to U.S. broadband service that is among the fastest, most affordable and most widely available in the world:<sup>16</sup>

- The average peak connection speed offered by cable operators exceeds 60 Mbps in all 50 states, and averages more than 100 Mbps in at least seven states. Speeds in many U.S. states rank among the fastest average peak connection speeds in the world.
- The U.S. is one of only two countries where three broadband technologies (cable modem, DSL and wireless broadband) are fully deployed.
- More than 1.5 million low-income families have been connected to the Internet through cable industry broadband adoption programs.

**The “Broadband Bonus.”** Numerous analyses have concluded that the overall economy has benefitted from investments in broadband infrastructure. The concept of a “broadband bonus” was developed to quantify how much new economic value has resulted from the global transition to broadband Internet access. A 2012 report<sup>17</sup> found that, for 2010, the estimated U.S. “broadband bonus” amounted to \$125 billion, or almost three times the level of direct broadband revenues; furthermore, the measured “bonus” nearly tripled in just three years (i.e., from 2007 to 2010).<sup>18</sup> At \$125 billion in 2010, the broadband bonus was estimated to add almost

<sup>16</sup> NCTA data.

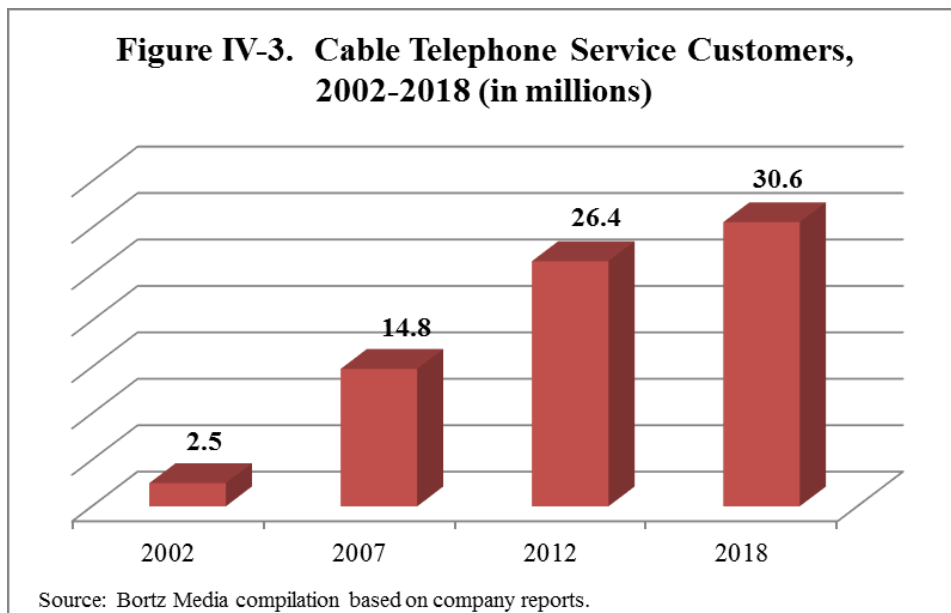
<sup>17</sup> Greenstein, S. and R. McDevitt (2012), “Measuring the Broadband Bonus in Thirty OECD Countries”, *OECD Digital Economy Papers*, No. 197, OECD Publishing.

<sup>18</sup> *Id.*

one percent to U.S. GDP (and certainly seems likely to exceed that level today based on its recent growth pattern). Finally, a more recent analysis from 2015 suggests that housing values are positively impacted (by nearly two percent) by the speed of the broadband connection available to the home.<sup>19</sup> As such, there is quantifiable evidence that the cable industry’s leadership role in introducing broadband and continually improving its service speeds has had significant economic growth benefits on a national level.

Recognizing the importance of broadband to communities, the cable industry has also undertaken several initiatives to encourage broadband adoption and narrow the “digital divide” (see additional detail below in the discussion of cable’s impact on communities).

**Digital voice service.** The FCC and Congress recognized the importance of creating a competitive local telephone marketplace with the passage of the Telecommunications Act. However, despite the early efforts of CLECs and other would-be competitors, the regional telephone companies still controlled over 93 percent of residential primary access lines as recently as the end of 2001. It has only been since the cable industry’s aggressive commitment to telephony (starting in 2001) that true residential competition has emerged. The number of digital phone customers served by the cable industry has grown from just over 2.5 million at the end of 2002 to more than 30 million at year-end 2018.<sup>20</sup>



Moreover, Comcast, Spectrum and other major cable companies introduced mobile phone service offerings in 2017 and added more than one million customers by the end of 2018. This new service offering will add to the competitive evolution of the wireless marketplace.

**Business services.** Over the last several years, cable companies have begun offering the services described above to small and mid-sized businesses. Business services now account for almost 14 percent of cable company revenues – or nearly \$18 billion in 2018.<sup>21</sup> Industry revenues from business services have more than doubled in just the last four years.

**Security and automation.** Finally, cable companies have used the capabilities of their network infrastructure

19 G. Molnar, S. Savage and D. Sicker, “Reevaluating the Broadband Bonus: Evidence from Neighborhood Access to Fiber and United States Housing Prices.” June 26, 2015.

20 Bortz Media estimates based on cable company reports.

21 Bortz Media estimates based on cable company reports.



to offer home security and home automation services. As of year-end 2018, Comcast alone provided such services to more than 1.3 million customers.

## Cable, Program Networks and Viewing

To be sure, cable's ongoing infrastructure investment and its implementation of digital technology have combined to broaden the industry's role in its customers' lives and to accelerate the pace at which appealing new services are deployed.

The commitment and success of the cable and programming network industries over the years in creating and providing choice to its customers can be measured in a number of different ways.

**Choice and flexibility.** The ongoing infrastructure and technological evolution of the cable industry has provided, first and foremost, the expanded bandwidth and digital compression needed to offer packages that include hundreds of programming choices (along with other services) to subscribers.

As described earlier in this section, most subscribers now also have access to literally thousands of programs on-demand, providing enormous flexibility. Finally, all or nearly all of the channels received on the home television set are now available on multiple devices (computer, tablet, mobile phone) and can be accessed outside the home.

Serving this range of consumer interests and consumer devices is the essence of choice – as measured by the combination of quantity and flexibility.

**Combining variety with control.** In addition to the sheer number of program networks, networks focused on specific niches, including those providing ethnically-targeted programming, children's programming, and other areas such as news, food, health, movies, music, sports, etc., are continually growing in number. As just one example, many cable systems now provide multicultural packages offering 50 or more channels specifically designed for particular ethnic groups. Primary examples are Latino tiers that include traditional Spanish-language networks as well as versions of popular program networks specifically designed to reflect the viewing interests of Latino subscribers.

In addition, recognizing that some of the diverse array of programming offered may not be appropriate for all viewers, cable operators provide parental controls that enable parents to manage how television is viewed in the home. In addition, programmers have increased the size of ratings icons shown at the beginning of programs and after each commercial break. Together, operators and programmers have committed more than \$550 million in public service announcements since 2005 to ensure that consumers are aware of the parental control capability.<sup>22</sup>

**Viewing metrics.** Viewing of subscription TV programming provides another indicator of the importance and value of the programming choices the cable operator industry and program networks now provide. Basic networks continue to capture a substantial majority of all television viewing, even as television has maintained its dominant position in an increasingly competitive media landscape. At any given time, 10 times more consumers are watching ad-supported TV content than are using Facebook. Similarly, 13 times more are watching TV content as compared with watching YouTube.<sup>23</sup>

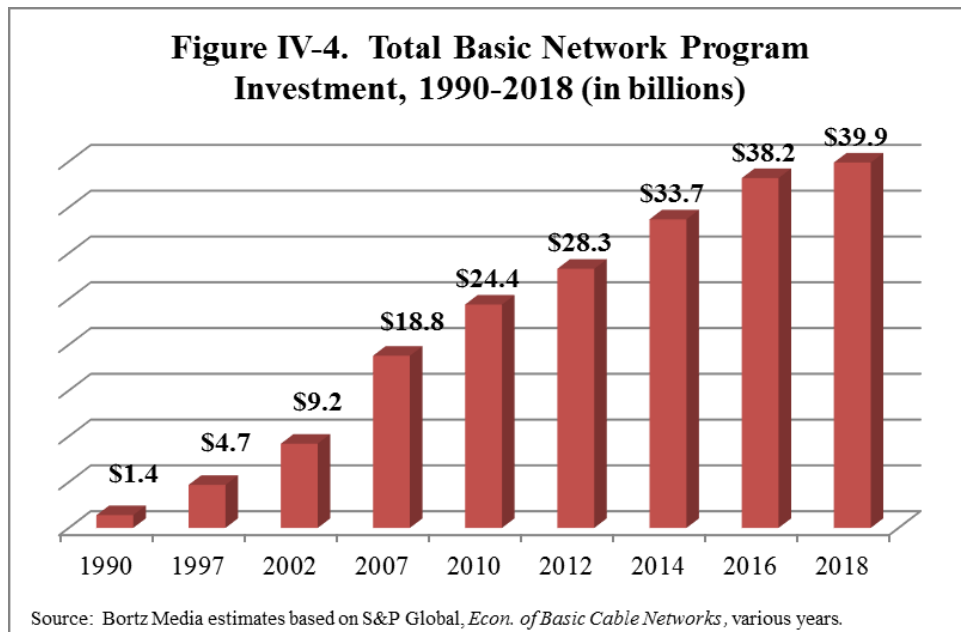
**Program quality.** As summarized in Section III, the importance of these viewing patterns, from an economic perspective, lies in the corresponding increase in program network advertising revenues. By re-investing these funds (as well as the growing license fees obtained from cable operators), program networks are continually increasing the resources devoted to purchasing and/or producing better programming.

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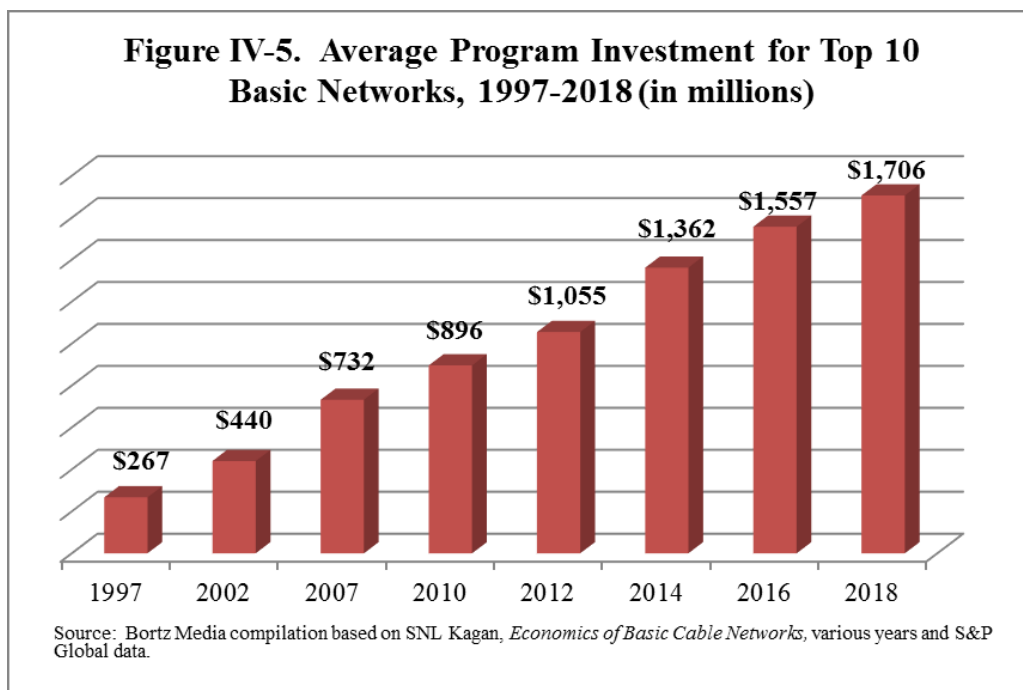
<sup>22</sup> NCTA.

<sup>23</sup> Video Advertising Bureau, *Unrivaled: How Multi-Screen TV Continues to Dominate in Reach, Relevance and Results*.

As Figure IV-4 illustrates, collectively, the annual spending on programming by basic networks grew from \$38 billion in 2016 to \$40 billion in 2018, which is more than quadruple the amount spent in 2002:



It should be noted that growth in programming expenditures is not merely a reflection of the addition of literally hundreds of new networks but also a reflection of increased spending on an individual network basis. As Figure IV-5 illustrates, average program spending for the top 10 basic networks has continually increased since 1997, including an increase in from \$1.56 billion in 2016 to more than \$1.7 billion in 2018:



As a result, the quality of basic and premium network programming has been greatly enhanced:

- Basic or premium networks won four of the six awards for outstanding programming series at the 2018 Primetime Emmy Awards. These awards included Outstanding Drama Series (HBO's *Game of Thrones*), Outstanding Limited Series (FX's *The Assassination of Gianni Versace: American Crime Story*), Outstanding Reality Competition Program (VH1's *RuPaul's Drag Race*), and Outstanding Variety Talk Series (HBO's *Last Week Tonight with John Oliver*).
- HBO and FX were among the most nominated platforms at the Emmy's, receiving 108 and 50 nominations, respectively.

## Cable and Program Network Industry Contributions to Communities

The cable operator industry, with over 3,000 individual cable systems operating in nearly every community in the country, makes a significant positive contribution to the local areas across the country:

**Community involvement.** The cable operator industry strives to ensure that cable systems are positive, contributing members of the communities in which they operate. This commitment frequently takes the shape of partnerships among programming networks and local cable systems to bring public affairs initiatives to local communities. Cable operator industry companies also leverage industry-wide initiatives, both new and longstanding, to meet the needs of local communities. A few examples of industry-wide cable public affairs initiatives include:

- **Narrowing the "digital divide."** Now, more than ever, access to the Internet through a broadband connection is necessary in almost all aspects of life – for students completing school assignments, in managing health care, for finding work and in communicating with friends and family. And still, too many families remain unconnected. The cable industry's ongoing commitment to narrowing this "digital divide" is carried forward with programs that offer low-cost and discounted broadband services to low-income households as well as digital literacy training programs and centers. Through initiatives such as Cox Communications' Connect2Compete, the cable industry has invested in broadband adoption programs connecting more than 1.5 million families and more than 30,000 schools with broadband connections.
- **Public service initiatives.** The cable industry's long-term commitment to its communities began with *Cable in the Classroom*, the industry-wide program in place for decades that helped wire the nation's schools for TV and broadband and that leveraged partnerships with cable program networks to offer free use of the best of cable's educational content,. Current examples of the industry's public service initiatives include:
  - **Mission Media.** Mission Media is an industry-wide collaborative effort to hire veterans. In 2018, Mission Media launched Models of Success, a collection of case studies focused on employers' best practices for recruiting, onboarding and retraining veterans.
  - **Heroes Work Here.** Separately, Walt Disney Company's "Heroes Work Here" program is a company-wide initiative to hire, train and support military veterans. Since launching the program in 2012, Disney has hired more than 10,000 veterans.
  - **Spectrum Housing Assist.** Spectrum's signature community initiative has leveraged almost 6,000 volunteers to make safety and health improvements to 28,000 homes – with a goal of improving 50,000 homes by 2020.
  - **Comcast Foundation.** The Comcast Foundation has donated more than \$550 million in support of digital literacy, community service initiatives and youth development in the communities they serve.

- **C-SPAN.** Since 1979, cable companies have funded the operation of the Cable-Satellite Public Affairs Network (C-SPAN) that provides public access to the U. S. political process, and local cable systems throughout the country offer channel space for distribution of C-SPAN programming. Cable support for these operations approximates \$60 million annually.
- **Workforce diversity.** Through a number of cable industry organizations, cable actively encourages diversity within its own employment and supplier ranks in order to better reflect the diversity in the communities cable serves. The Walter Kaitz Foundation, managed by NCTA, raises and distributes more than \$1 million annually to organizations promoting cable diversity. The National Association for Multi-Ethnicity in Communications (NAMIC), whose members include cable operators, programmers, hardware suppliers and others, engages in education and advocacy in support of diversity, including an online job bank, an executive leadership and development program, and a mentorship program. Women in Cable Telecommunications (WICT) administers an institute that assists women in the cable industry in the development of professional skills and provides mentoring support. Finally, the Emma Bowen Foundation was established by the cable and broadcast industries to increase the access of minority students to permanent job opportunities. Partly as a result of such initiatives, people of color make up 40 percent of the industry's workforce, while women account for 34 percent of the workforce and 38 percent of executive positions.<sup>24</sup>

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24 NCTA.

## APPENDIX A. METHODOLOGY AND DATA SOURCES

This Appendix describes the overall methodology used to estimate the economic impact of the cable and program network industries and reviews the primary information sources on which Bortz Media's estimates are based.

### Overview

Economic impact analysis is based on the interdependence of economic sectors. In other words, given that economic activity in one sector of the economy stimulates activity in other sectors, impact analysis attempts to quantify these relationships. Each dollar created in one sector is essentially re-spent indefinitely (with steadily diminishing impacts), resulting in an economic effect greater than the original stimulus. Due to the complexity of tracking such dollar flows through the complete re-spending process, "multipliers" are used to estimate the total impact of activity in a sector. The multipliers used are derived from sophisticated mathematical models that replicate dollar flows in the economy.

In measuring economic effects, impacts are categorized as follows:

- **Direct impacts.** These impacts reflect the economic activity of cable operators (or program networks) themselves, including jobs and employee income.
- **Linked impacts.** These impacts reflect the industry-related economic activity of industry suppliers. For cable operators, key suppliers include program networks, equipment manufacturers and professional services firms. For program networks, key suppliers include providers of content such as the major studios and sports leagues/franchises.
- **Indirect impacts.** Indirect impacts include: (1) economic activity generated by the purchase of goods and services by cable or program network industry suppliers (i.e., linked suppliers), referred to as intermediate effects; and (2) induced effects, or economic activity generated by the purchase of goods and services by individuals whose incomes derive directly or indirectly from the cable or program network industries. Indirect impacts are also sometimes termed "re-spending" effects.

For purposes of simplification, only direct, linked and total impacts (combining direct, linked and indirect effects) are presented in this report.

Based on the factors described above, this study included two key steps: (1) estimation of the direct revenue flows both to cable operators/program networks and from cable operators/program networks to their direct suppliers; and (2) projection of economic impacts attributable to these flows.

As noted elsewhere in this report, total impact figures reported for each industry are believed to reflect accurately the economic impacts of that industry. However, since the program network industry is a supplier to the cable operator industry, a portion of the program network industry's total impacts are subsumed in the total impacts estimated for the cable operator industry. As such, the total impacts for the two industries as presented in this report are not additive.

### Direct Dollar Flow Estimation

Cable operator and program network revenues, expenditures and the allocation of these expenditures by economic sector were estimated based on data from the following sources:

- Review and analysis of 2018 operating and financial statements for the major publicly held cable multiple system operators, along with a review of various investor presentations providing more detail on

individual revenue and expenditure categories.

- A survey of both large and small cable MSOs (with respondents representing more than two-thirds of all cable subscribers), as well as of the parent companies of the major programming networks. These surveys obtained information on employment and employee compensation, as well as the disposition of certain key expense and capital investment categories.
- Review and analysis of detailed operating data from certain individual cable systems and program networks/network groups.
- Review of various industry level economic data for the cable operator industry, the program network industry and the major supplier industries for both from the U.S. Department of Commerce Bureau of Economic Analysis.
- A comprehensive review of available secondary source data including information from NCTA, S & P Global, the Video Advertising Bureau (VAB), cable trade publications and various other sources. These data sources have been cited when used directly.
- Interviews with selected industry executives.

Information obtained from the data sources summarized above was used to create cable operator industry and program network industry economic models for the year 2018. Major categories of funds' flows analyzed included: cable system and program network operations, cable system capital expenditures, cable operator financing activities, and program network advertising. Within each industry, each area was analyzed in detail to avoid double-counting.

Dollar flows from each of these categories were allocated to cable and program network employee compensation, the purchase of goods and services from industry suppliers, or to special classifications such as payments to government (e.g., taxes, franchise fees, etc.). Payments to suppliers were then segmented into individual categories based on the North American Industrial Classification System (NAICS) utilized by the U.S. Department of Commerce.

In any analysis of this type, certain categorization decisions must be made to accommodate the economic model utilized, and the level of detail available regarding the underlying data. Based on our review of the data and the characteristics of the impact estimation methodology, moderate variations in the classification of individual expenditures components would not have a meaningful impact on the overall economic impacts estimated.

## Projection of Economic Impacts

The dollar flows identified above, as well as other information obtained from the sources noted, were used to estimate employment, compensation and related impacts at all three impact levels – direct (cable systems/MSOs or program networks), linked (suppliers) and indirect (re-spending effects).

### Direct Impacts

Direct impacts include cable operator employment and employee compensation that were estimated primarily on survey responses from MSOs and public company reports and presentations. Industry level data reported by the Department of Commerce were used as a check on these sources. Similarly, linked supplier employment estimates were derived from Department of Commerce sector data, as well as surveys of key program suppliers.

Similarly, for the program network estimates, surveys of key program network groups represented the key information source with respect to employment and compensation.

## Indirect Impact Estimation

Indirect impacts were estimated using sector level multipliers obtained from the Regional Input-Output Modeling System (known as RIMS II) developed by the Bureau of Economic Analysis at the U.S. Department of Commerce. RIMS II provides a comprehensive tool for quantifying the linkages between economic sectors and estimating aggregate economic impacts.

Multipliers utilized and resulting economic relationships were compared with prior Bortz Media economic impact analyses for consistency.

## Comparison with Earlier Studies

As noted in Section II, Bortz Media completed a similar cable operator industry economic impact analysis for the year 2016 (as well as analyses for the years 1986, 1988, 1990, 2002, 2007, 2010, 2012 and 2014). The methodology and data sources used for the 2018 analysis are generally consistent with the approaches used in the prior studies. In particular, the basis for the development of direct impact assumptions and the quantification of direct and linked impacts is virtually identical to that employed in the prior studies.

## Limitations

The limitations associated with the economic impact components of this study are primarily attributable to reliance on economic relationships developed through a generic input/output model of the national economy as a basis for indirect impact estimation. Industry sector designations, while highly disaggregated, do not precisely fit the cable or program network industries. The dollar transactions and relationships between output, employment and income are averages representative of all businesses within a particular classification rather than solely those serving the cable or program network industries.

## **APPENDIX B. CABLE EMPLOYMENT AND ECONOMIC IMPACT BY STATE AND CONGRESSIONAL DISTRICT**

Cable operators' \$300 billion investment since 1996 has been felt in every community across the nation. As of 2018, the cable operator industry, directly and indirectly, accounted for 2.37 million U.S. jobs, which represents \$114 billion in personal income, and the gross economic output attributable to the industry amounted to \$373 billion. Cable operator industry employees are found in all 50 states, and there are 3,000 locally based cable systems.



# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# ALABAMA

## STATEWIDE

**Major Cable Operators**

Spectrum, Comcast,  
Mediacom

**Cable Operator Employees**

2,797

**Total Local Effects**

25,096 direct & indirect jobs  
\$3.9 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

411

**Total Local Effects**

3,688 jobs, \$580 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

330

**Total Local Effects**

2,961 jobs, \$466 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

321

**Total Local Effects**

2,880 jobs, \$453 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

318

**Total Local Effects**

2,853 jobs, \$449 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

622

**Total Local Effects**

5,581 jobs, \$878 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

490

**Total Local Effects**

4,397 jobs, \$691 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

305

**Total Local Effects**

2,737 jobs, \$430 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## ALASKA

### STATEWIDE

**Major Cable Operators**

GCI

**Cable Operator Employees**

1,362

**Total Local Effects**

12,221 direct & indirect jobs

\$1.9 billion economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# ARIZONA

## STATEWIDE

### Major Cable Operators

Cox, Comcast, Cable One,  
Altice

### Cable Operator Employees

5,282

### Total Local Effects

47,393 direct & indirect jobs  
\$7.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

466

#### Total Local Effects

4,181 jobs, \$657 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

546

#### Total Local Effects

4,899 jobs, \$770 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

385

#### Total Local Effects

3,454 jobs, \$543 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

307

#### Total Local Effects

2,755 jobs, \$433 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

329

#### Total Local Effects

2,952 jobs, \$464 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

2,317

#### Total Local Effects

20,789 jobs, \$3,269 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

312

#### Total Local Effects

2,799 jobs, \$440 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

316

#### Total Local Effects

2,835 jobs, \$446 million economic impact

9TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

304

**Total Local Effects**

2,728 jobs, \$429 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## ARKANSAS

### STATEWIDE

**Major Cable Operators**

Altice, Cox, Comcast

**Cable Operator Employees**

1,932

**Total Local Effects**

17,335 direct & indirect jobs  
\$2.7 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

423

**Total Local Effects**

3,795 jobs, \$597 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

508

**Total Local Effects**

4,558 jobs, \$717 million economic impact

#### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

497

**Total Local Effects**

4,459 jobs, \$701 million economic impact

#### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

504

**Total Local Effects**

4,522 jobs, \$711 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## CALIFORNIA

### STATEWIDE

**Major Cable Operators**

Spectrum, Comcast, Cox

**Cable Operator Employees**

21,934

**Total Local Effects**

196,802 direct & indirect jobs  
\$30.9 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

354

**Total Local Effects**

3,176 jobs, \$499 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

317

**Total Local Effects**

2,844 jobs, \$447 million economic impact

#### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

537

**Total Local Effects**

4,818 jobs, \$758 million economic impact

#### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

331

**Total Local Effects**

2,970 jobs, \$467 million economic impact

#### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

326

**Total Local Effects**

2,925 jobs, \$460 million economic impact

#### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

314

**Total Local Effects**

2,817 jobs, \$443 million economic impact

#### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

317

**Total Local Effects**

2,844 jobs, \$447 million economic impact

#### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

732

**Total Local Effects**

6,568 jobs, \$1,033 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

582

### Total Local Effects

5,222 jobs, \$821 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

837

### Total Local Effects

7,510 jobs, \$1,181 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

701

### Total Local Effects

6,290 jobs, \$999 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

377

### Total Local Effects

3,383 jobs, \$532 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

306

### Total Local Effects

2,746 jobs, \$432 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

326

### Total Local Effects

2,925 jobs, \$460 million economic impact

## 15TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

359

### Total Local Effects

3,221 jobs, \$506 million economic impact

## 16TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

858

### Total Local Effects

7,698 jobs, \$1,210 million economic impact

## 17TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

310

### Total Local Effects

2,781 jobs, \$437 million economic impact

## 18TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

315

### Total Local Effects

2,826 jobs, \$444 million economic impact

## 19TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

310

### Total Local Effects

2,781 jobs, \$437 million economic impact

## 20TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

301

### Total Local Effects

2,701 jobs, \$425 million economic impact

## 21ST CONGRESSIONAL DISTRICT

### Cable Operator Employees

461

### Total Local Effects

4,136 jobs, \$650 million economic impact

## 22ND CONGRESSIONAL DISTRICT

### Cable Operator Employees

312

### Total Local Effects

2,799 jobs, \$440 million economic impact

## 23RD CONGRESSIONAL DISTRICT

### Cable Operator Employees

319

### Total Local Effects

2,862 jobs, \$450 million economic impact

## 24TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

312

### Total Local Effects

2,799 jobs, \$440 million economic impact

## 25TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

524

### Total Local Effects

4,702 jobs, \$739 million economic impact

## 26TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

323

### Total Local Effects

2,898 jobs, \$456 million economic impact

## 27TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

460

### Total Local Effects

4,127 jobs, \$649 million economic impact

## 28TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

491

### Total Local Effects

4,405 jobs, \$693 million economic impact

## 29TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

378

### Total Local Effects

3,392 jobs, \$533 million economic impact

## 30TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

346

### Total Local Effects

3,104 jobs, \$488 million economic impact

## 31ST CONGRESSIONAL DISTRICT

### Cable Operator Employees

349

### Total Local Effects

3,131 jobs, \$492 million economic impact

## 32ND CONGRESSIONAL DISTRICT

### Cable Operator Employees

309

### Total Local Effects

2,772 jobs, \$436 million economic impact

## 33RD CONGRESSIONAL DISTRICT

### Cable Operator Employees

545

### Total Local Effects

4,890 jobs, \$769 million economic impact

## 34TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

314

### Total Local Effects

2,817 jobs, \$443 million economic impact

## 35TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

313

### Total Local Effects

2,808 jobs, \$442 million economic impact

## 36TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

377

### Total Local Effects

3,383 jobs, \$532 million economic impact



**37TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

425

**Total Local Effects**

3,813 jobs, \$600 million economic impact

**38TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

508

**Total Local Effects**

4,558 jobs, \$717 million economic impact

**39TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

310

**Total Local Effects**

2,781 jobs, \$437 million economic impact

**40TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

321

**Total Local Effects**

2,880 jobs, \$453 million economic impact

**41ST CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

386

**Total Local Effects**

3,463 jobs, \$545 million economic impact

**42ND CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

308

**Total Local Effects**

2,764 jobs, \$435 million economic impact

**43RD CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

320

**Total Local Effects**

2,871 jobs, \$451 million economic impact

**44TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

306

**Total Local Effects**

2,746 jobs, \$432 million economic impact

**45TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

634

**Total Local Effects**

5,689 jobs, \$894 million economic impact

**46TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

310

**Total Local Effects**

2,781 jobs, \$437 million economic impact

**47TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

302

**Total Local Effects**

2,710 jobs, \$426 million economic impact

**48TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

388

**Total Local Effects**

3,481 jobs, \$547 million economic impact

**49TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

315

**Total Local Effects**

2,826 jobs, \$444 million economic impact

**50TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

316

**Total Local Effects**

2,835 jobs, \$446 million economic impact

## 51ST CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,071

### Total Local Effects

9,610 jobs, \$1,511 million economic impact

## 52ND CONGRESSIONAL DISTRICT

### Cable Operator Employees

460

### Total Local Effects

4,127 jobs, \$649 million economic impact

## 53RD CONGRESSIONAL DISTRICT

### Cable Operator Employees

311

### Total Local Effects

2,790 jobs, \$439 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# COLORADO

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum

**Cable Operator Employees**

13,569

**Total Local Effects**

121,748 direct & indirect jobs  
\$19.1 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

4,362

**Total Local Effects**

39,138 jobs, \$6,154 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,201

**Total Local Effects**

10,776 jobs, \$1,694 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

314

**Total Local Effects**

2,817 jobs, \$443 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

3,116

**Total Local Effects**

27,958 jobs, \$4,396 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,927

**Total Local Effects**

17,290 jobs, \$2,719 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

2,092

**Total Local Effects**

18,770 jobs, \$2,951 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

557

**Total Local Effects**

4,998 jobs, \$786 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## CONNECTICUT

### STATEWIDE

**Major Cable Operators**

Comcast, Spectrum, Altice, Cox

**Cable Operator Employees**

3,392

**Total Local Effects**

30,435 direct & indirect jobs  
\$4.8 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

810

**Total Local Effects**

7,268 jobs, \$1,143 million economic impact

#### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

685

**Total Local Effects**

6,146 jobs, \$966 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

425

**Total Local Effects**

3,813 jobs, \$600 million economic impact

#### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

725

**Total Local Effects**

6,505 jobs, \$1,023 million economic impact

#### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

747

**Total Local Effects**

6,702 jobs, \$1,054 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## DELAWARE

### STATEWIDE

**Major Cable Operators**

Comcast, Mediacom

**Cable Operator Employees**

1,236

**Total Local Effects**

11,090 direct & indirect jobs

\$1.7 billion economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## DISTRICT OF COLUMBIA

### DISTRICTWIDE

**Major Cable Operators**

Comcast

**Cable Operator Employees**

305

**Total Local Effects**

2,737 direct & indirect jobs

\$0.4 billion economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# FLORIDA

## STATEWIDE

### Major Cable Operators

Comcast, Spectrum, Cox,  
Mediacom

### Cable Operator Employees

18,076

### Total Local Effects

162,187 direct & indirect jobs  
\$25.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

928

#### Total Local Effects

8,326 jobs, \$1,309 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

309

#### Total Local Effects

2,772 jobs, \$436 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

330

#### Total Local Effects

2,961 jobs, \$466 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

774

#### Total Local Effects

6,945 jobs, \$1,092 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

345

#### Total Local Effects

3,096 jobs, \$487 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

865

#### Total Local Effects

7,761 jobs, \$1,220 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,317

#### Total Local Effects

11,817 jobs, \$1,858 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

596

#### Total Local Effects

5,348 jobs, \$841 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

841

### Total Local Effects

7,546 jobs, \$1,187 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

589

### Total Local Effects

5,285 jobs, \$831 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

506

### Total Local Effects

4,540 jobs, \$714 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

850

### Total Local Effects

7,627 jobs, \$1,199 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

923

### Total Local Effects

8,282 jobs, \$1,302 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,084

### Total Local Effects

9,726 jobs, \$1,529 million economic impact

## 15TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

739

### Total Local Effects

6,631 jobs, \$1,043 million economic impact

## 16TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

871

### Total Local Effects

7,815 jobs, \$1,229 million economic impact

## 17TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

431

### Total Local Effects

3,867 jobs, \$608 million economic impact

## 18TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

655

### Total Local Effects

5,877 jobs, \$924 million economic impact

## 19TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

604

### Total Local Effects

5,419 jobs, \$852 million economic impact

## 20TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,505

### Total Local Effects

13,504 jobs, \$2,123 million economic impact

## 21ST CONGRESSIONAL DISTRICT

### Cable Operator Employees

359

### Total Local Effects

3,221 jobs, \$506 million economic impact

## 22ND CONGRESSIONAL DISTRICT

### Cable Operator Employees

302

### Total Local Effects

2,710 jobs, \$426 million economic impact



**23RD CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

539

**Total Local Effects**

4,836 jobs, \$760 million economic impact

**24TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

737

**Total Local Effects**

6,613 jobs, \$1,040 million economic impact

**25TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

312

**Total Local Effects**

2,799 jobs, \$440 million economic impact

**26TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

437

**Total Local Effects**

3,921 jobs, \$617 million economic impact

**27TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

328

**Total Local Effects**

2,943 jobs, \$463 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# GEORGIA

## STATEWIDE

### Major Cable Operators

Comcast, Cox, Spectrum,  
Mediacom

### Cable Operator Employees

9,533

### Total Local Effects

85,535 direct & indirect jobs  
\$13.4 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

312

#### Total Local Effects

2,799 jobs, \$440 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

353

#### Total Local Effects

3,167 jobs, \$498 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

466

#### Total Local Effects

4,181 jobs, \$657 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,133

#### Total Local Effects

10,166 jobs, \$1,598 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

583

#### Total Local Effects

5,231 jobs, \$823 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

3,605

#### Total Local Effects

32,346 jobs, \$5,086 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

504

#### Total Local Effects

4,522 jobs, \$711 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

329

#### Total Local Effects

2,952 jobs, \$464 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

318

### Total Local Effects

2,853 jobs, \$449 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

329

### Total Local Effects

2,952 jobs, \$464 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

573

### Total Local Effects

5,141 jobs, \$808 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

322

### Total Local Effects

2,889 jobs, \$454 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

387

### Total Local Effects

3,472 jobs, \$546 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

319

### Total Local Effects

2,862 jobs, \$450 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## HAWAII

### STATEWIDE

**Major Cable Operators**

Spectrum

**Cable Operator Employees**

1,336

**Total Local Effects**

11,987 direct & indirect jobs  
\$1.9 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

818

**Total Local Effects**

7,339 jobs, \$1,154 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

518

**Total Local Effects**

4,648 jobs, \$731 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# IDAHO

## STATEWIDE

**Major Cable Operators**

Cable One, Spectrum,  
Comcast, Altice, Cox

**Cable Operator Employees**

668

**Total Local Effects**

5,994 direct & indirect jobs  
\$0.9 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

345

**Total Local Effects**

3,096 jobs, \$487 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

323

**Total Local Effects**

2,898 jobs, \$456 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# ILLINOIS

## STATEWIDE

**Major Cable Operators**

Comcast, Mediacom, Spectrum

**Cable Operator Employees**

10,015

**Total Local Effects**

89,859 direct & indirect jobs  
\$14.1 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,001

**Total Local Effects**

8,981 jobs, \$1,412 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

542

**Total Local Effects**

4,863 jobs, \$765 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

446

**Total Local Effects**

4,002 jobs, \$629 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

537

**Total Local Effects**

4,818 jobs, \$758 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

325

**Total Local Effects**

2,916 jobs, \$459 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,292

**Total Local Effects**

11,592 jobs, \$1,823 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

481

**Total Local Effects**

4,316 jobs, \$679 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

845

**Total Local Effects**

7,582 jobs, \$1,192 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

312

### Total Local Effects

2,799 jobs, \$440 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

314

### Total Local Effects

2,817 jobs, \$443 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

573

### Total Local Effects

5,141 jobs, \$808 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,050

### Total Local Effects

9,421 jobs, \$1,481 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

313

### Total Local Effects

2,808 jobs, \$442 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

512

### Total Local Effects

4,594 jobs, \$722 million economic impact

## 15TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

317

### Total Local Effects

2,844 jobs, \$449 million economic impact

## 16TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

301

### Total Local Effects

2,701 jobs, \$423 million economic impact

## 17TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

403

### Total Local Effects

3,616 jobs, \$569 million economic impact

## 18TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

451

### Total Local Effects

4,047 jobs, \$636 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# INDIANA

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum, Mediacom

**Cable Operator Employees**

3,560

**Total Local Effects**

31,942 direct & indirect jobs  
\$5.0 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

422

**Total Local Effects**

3,786 jobs, \$595 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

311

**Total Local Effects**

2,790 jobs, \$439 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

418

**Total Local Effects**

3,750 jobs, \$590 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

319

**Total Local Effects**

2,862 jobs, \$450 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

628

**Total Local Effects**

5,635 jobs, \$886 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

328

**Total Local Effects**

2,943 jobs, \$463 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

432

**Total Local Effects**

3,876 jobs, \$609 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

369

**Total Local Effects**

3,311 jobs, \$521 million economic impact



# THE CABLE OPERATOR INDUSTRY'S ECONOMIC IMPACT

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## 9TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

333

### **Total Local Effects**

2,988 jobs, \$470 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## IOWA

### STATEWIDE

**Major Cable Operators**

Mediacom

**Cable Operator Employees**

1,754

**Total Local Effects**

15,738 direct & indirect jobs  
\$2.5 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

319

**Total Local Effects**

2,862 jobs, \$450 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

314

**Total Local Effects**

2,817 jobs, \$443 million economic impact

#### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

809

**Total Local Effects**

7,259 jobs, \$1,141 million economic impact

#### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

312

**Total Local Effects**

2,799 jobs, \$440 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# KANSAS

## STATEWIDE

## Major Cable Operators

Cox, Spectrum, Cable One

## Cable Operator Employees

2,032

## Total Local Effects

18,232 direct & indirect jobs  
\$2.9 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

323

#### Total Local Effects

2,898 jobs, \$456 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

366

#### Total Local Effects

3,284 jobs, \$516 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

369

#### Total Local Effects

3,311 jobs, \$521 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

974

#### Total Local Effects

8,739 jobs, \$1,374 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# KENTUCKY

## STATEWIDE

**Major Cable Operators**

Spectrum, Comcast, Mediacom

**Cable Operator Employees**

3,682

**Total Local Effects**

33,037 direct & indirect jobs  
\$5.2 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

316

**Total Local Effects**

2,835 jobs, \$446 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

878

**Total Local Effects**

7,878 jobs, \$1,239 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,386

**Total Local Effects**

12,436 jobs, \$1,955 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

472

**Total Local Effects**

4,235 jobs, \$666 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

320

**Total Local Effects**

2,871 jobs, \$451 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

310

**Total Local Effects**

2,781 jobs, \$437 million economic impact

## NATIONAL

### Economic Impact

\$373 billion

### Total Jobs

2.4 million direct & indirect jobs

### Industry Investment

\$290 billion over past 20 years

## LOUISIANA

### STATEWIDE

### Major Cable Operators

Cox, Altice, Spectrum, Comcast

### Cable Operator Employees

2,823

### Total Local Effects

25,329 direct & indirect jobs  
\$4.0 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

675

#### Total Local Effects

6,056 jobs, \$952 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

696

#### Total Local Effects

6,245 jobs, \$982 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

315

#### Total Local Effects

2,826 jobs, \$444 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

314

#### Total Local Effects

2,817 jobs, \$443 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

367

#### Total Local Effects

3,293 jobs, \$518 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

456

#### Total Local Effects

4,091 jobs, \$643 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## MAINE

### STATEWIDE

**Major Cable Operators**

Spectrum, Comcast

**Cable Operator Employees**

1,218

**Total Local Effects**

10,928 direct & indirect jobs  
\$1.7 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

844

**Total Local Effects**

7,573 jobs, \$1,191 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

374

**Total Local Effects**

3,356 jobs, \$528 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# MARYLAND

## STATEWIDE

## Major Cable Operators

Comcast, Spectrum

## Cable Operator Employees

4,596

## Total Local Effects

41,238 direct & indirect jobs  
\$6.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

833

#### Total Local Effects

7,474 jobs, \$1,175 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,030

#### Total Local Effects

9,242 jobs, \$1,453 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

511

#### Total Local Effects

4,585 jobs, \$721 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

641

#### Total Local Effects

5,751 jobs, \$904 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

455

#### Total Local Effects

4,082 jobs, \$642 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

350

#### Total Local Effects

3,140 jobs, \$494 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

417

#### Total Local Effects

3,742 jobs, \$588 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

359

#### Total Local Effects

3,221 jobs, \$506 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# MASSACHUSETTS

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum

**Cable Operator Employees**

5,626

**Total Local Effects**

50,479 direct & indirect jobs  
\$7.9 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

619

**Total Local Effects**

5,554 jobs, \$873 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

813

**Total Local Effects**

7,295 jobs, \$1,147 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

660

**Total Local Effects**

5,922 jobs, \$931 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

504

**Total Local Effects**

4,522 jobs, \$711 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

763

**Total Local Effects**

6,846 jobs, \$1,076 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

795

**Total Local Effects**

7,133 jobs, \$1,122 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

500

**Total Local Effects**

4,486 jobs, \$705 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

304

**Total Local Effects**

2,728 jobs, \$429 million economic impact



# THE CABLE OPERATOR INDUSTRY'S ECONOMIC IMPACT

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## 9TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

668

### **Total Local Effects**

5,994 jobs, \$942 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# MICHIGAN

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum

**Cable Operator Employees**

7,425

**Total Local Effects**

66,621 direct & indirect jobs  
\$10.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

358

**Total Local Effects**

3,212 jobs, \$505 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

694

**Total Local Effects**

6,227 jobs, \$979 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

379

**Total Local Effects**

3,401 jobs, \$535 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

401

**Total Local Effects**

3,598 jobs, \$566 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

420

**Total Local Effects**

3,768 jobs, \$593 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

321

**Total Local Effects**

2,880 jobs, \$453 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

534

**Total Local Effects**

4,791 jobs, \$753 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

317

**Total Local Effects**

2,844 jobs, \$447 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

965

### Total Local Effects

8,658 jobs, \$1,361 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

342

### Total Local Effects

3,069 jobs, \$483 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

809

### Total Local Effects

7,259 jobs, \$1,141 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

893

### Total Local Effects

8,012 jobs, \$1,260 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

454

### Total Local Effects

4,074 jobs, \$641 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

538

### Total Local Effects

4,827 jobs, \$759 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# MINNESOTA

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum, Mediacom,  
Midcontinent

**Cable Operator Employees**

4,317

**Total Local Effects**

38,734 direct & indirect jobs  
\$6.1 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

980

**Total Local Effects**

8,793 jobs, \$1,383 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

522

**Total Local Effects**

4,684 jobs, \$736 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

675

**Total Local Effects**

6,056 jobs, \$952 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

694

**Total Local Effects**

6,227 jobs, \$979 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

470

**Total Local Effects**

4,217 jobs, \$663 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

335

**Total Local Effects**

3,006 jobs, \$473 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

318

**Total Local Effects**

2,853 jobs, \$449 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

323

**Total Local Effects**

2,898 jobs, \$456 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# MISSISSIPPI

## STATEWIDE

**Major Cable Operators**

Comcast, Cable One

**Cable Operator Employees**

2,124

**Total Local Effects**

19,058 direct & indirect jobs  
\$3.0 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

320

**Total Local Effects**

2,871 jobs, \$451 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

890

**Total Local Effects**

7,986 jobs, \$1,256 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

549

**Total Local Effects**

4,926 jobs, \$775 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

365

**Total Local Effects**

3,275 jobs, \$515 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# MISSOURI

## STATEWIDE

### Major Cable Operators

Spectrum, Altice, Mediacom,  
Comcast

### Cable Operator Employees

6,955

### Total Local Effects

62,404 direct & indirect jobs  
\$9.8 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

2,535

#### Total Local Effects

22,745 jobs, \$3,576 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,900

#### Total Local Effects

17,048 jobs, \$2,681 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

547

#### Total Local Effects

4,908 jobs, \$772 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

330

#### Total Local Effects

2,961 jobs, \$466 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

702

#### Total Local Effects

6,299 jobs, \$990 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

323

#### Total Local Effects

2,898 jobs, \$456 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

310

#### Total Local Effects

2,781 jobs, \$437 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

308

#### Total Local Effects

2,764 jobs, \$435 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## MONTANA

### STATEWIDE

**Major Cable Operators**

Spectrum

**Cable Operator Employees**

730

**Total Local Effects**

6,550 direct & indirect jobs

\$1.0 billion economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# NEBRASKA

## STATEWIDE

**Major Cable Operators**

Cox, Spectrum

**Cable Operator Employees**

1,590

**Total Local Effects**

14,266 direct & indirect jobs  
\$2.2 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

361

**Total Local Effects**

3,239 jobs, \$509 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

866

**Total Local Effects**

7,770 jobs, \$1,222 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

363

**Total Local Effects**

3,257 jobs, \$512 million economic impact



# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# NEVADA

## STATEWIDE

**Major Cable Operators**

Cox, Spectrum

**Cable Operator Employees**

2,592

**Total Local Effects**

23,257 direct & indirect jobs  
\$3.7 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,561

**Total Local Effects**

14,006 jobs, \$2,202 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

420

**Total Local Effects**

3,768 jobs, \$593 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

304

**Total Local Effects**

2,728 jobs, \$429 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

307

**Total Local Effects**

2,755 jobs, \$433 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## NEW HAMPSHIRE

### STATEWIDE

**Major Cable Operators**

Comcast, Spectrum, MetroCast

**Cable Operator Employees**

2,195

**Total Local Effects**

19,695 direct & indirect jobs  
\$3.1 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,534

**Total Local Effects**

13,764 jobs, \$2,164 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

661

**Total Local Effects**

5,931 jobs, \$933 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# NEW JERSEY

## STATEWIDE

### Major Cable Operators

Comcast, Altice, Spectrum,  
Service Electric

### Cable Operator Employees

8,743

### Total Local Effects

78,446 direct & indirect jobs  
\$12.3 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

2,240

#### Total Local Effects

20,098 jobs, \$3,160 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

614

#### Total Local Effects

5,509 jobs, \$866 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

856

#### Total Local Effects

7,680 jobs, \$1,208 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

363

#### Total Local Effects

3,257 jobs, \$512 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

539

#### Total Local Effects

4,836 jobs, \$760 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,147

#### Total Local Effects

10,291 jobs, \$1,618 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

443

#### Total Local Effects

3,975 jobs, \$625 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

450

#### Total Local Effects

4,038 jobs, \$635 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

338

### **Total Local Effects**

3,033 jobs, \$477 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

959

### **Total Local Effects**

8,605 jobs, \$1,353 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

340

### **Total Local Effects**

3,051 jobs, \$480 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

454

### **Total Local Effects**

4,074 jobs, \$641 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## NEW MEXICO

### STATEWIDE

**Major Cable Operators**

Comcast

**Cable Operator Employees**

1,203

**Total Local Effects**

10,794 direct & indirect jobs

\$1.7 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

547

**Total Local Effects**

4,908 jobs, \$772 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

319

**Total Local Effects**

2,862 jobs, \$450 million economic impact

#### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

337

**Total Local Effects**

3,024 jobs, \$475 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# NEW YORK

## STATEWIDE

### Major Cable Operators

Spectrum, Altice, Comcast,  
Mediacom

### Cable Operator Employees

20,001

### Total Local Effects

179,459 direct & indirect jobs  
\$28.2 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,113

#### Total Local Effects

9,986 jobs, \$1,570 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

2,549

#### Total Local Effects

22,871 jobs, \$3,596 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

924

#### Total Local Effects

8,291 jobs, \$1,304 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

794

#### Total Local Effects

7,124 jobs, \$1,120 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

592

#### Total Local Effects

5,312 jobs, \$835 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,672

#### Total Local Effects

15,002 jobs, \$2,359 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

432

#### Total Local Effects

3,876 jobs, \$609 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

351

#### Total Local Effects

3,149 jobs, \$495 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

384

### Total Local Effects

3,445 jobs, \$542 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

327

### Total Local Effects

2,934 jobs, \$461 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

346

### Total Local Effects

3,104 jobs, \$488 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

326

### Total Local Effects

2,925 jobs, \$460 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

353

### Total Local Effects

3,167 jobs, \$498 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

729

### Total Local Effects

6,541 jobs, \$1,028 million economic impact

## 15TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

345

### Total Local Effects

3,096 jobs, \$487 million economic impact

## 16TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

556

### Total Local Effects

4,989 jobs, \$784 million economic impact

## 17TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

369

### Total Local Effects

3,311 jobs, \$521 million economic impact

## 18TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,039

### Total Local Effects

9,322 jobs, \$1,466 million economic impact

## 19TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

587

### Total Local Effects

5,267 jobs, \$828 million economic impact

## 20TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,155

### Total Local Effects

10,363 jobs, \$1,630 million economic impact

## 21ST CONGRESSIONAL DISTRICT

### Cable Operator Employees

368

### Total Local Effects

3,302 jobs, \$519 million economic impact

## 22ND CONGRESSIONAL DISTRICT

### Cable Operator Employees

810

### Total Local Effects

7,268 jobs, \$1,143 million economic impact

## 23RD CONGRESSIONAL DISTRICT

### Cable Operator Employees

309

### Total Local Effects

2,772 jobs, \$436 million economic impact

## 24TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,091

### Total Local Effects

9,789 jobs, \$1,539 million economic impact

## 25TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

984

### Total Local Effects

8,829 jobs, \$1,388 million economic impact

## 26TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,080

### Total Local Effects

9,690 jobs, \$1,524 million economic impact

## 27TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

416

### Total Local Effects

3,733 jobs, \$587 million economic impact



# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# NORTH CAROLINA

## STATEWIDE

**Major Cable Operators**

Spectrum, Altice

**Cable Operator Employees**

10,263

**Total Local Effects**

92,085 direct & indirect jobs  
\$14.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

983

**Total Local Effects**

8,820 jobs, \$1,387 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,179

**Total Local Effects**

10,579 jobs, \$1,663 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

342

**Total Local Effects**

3,069 jobs, \$483 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

439

**Total Local Effects**

3,939 jobs, \$619 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

663

**Total Local Effects**

5,949 jobs, \$935 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

916

**Total Local Effects**

8,219 jobs, \$1,292 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

316

**Total Local Effects**

2,835 jobs, \$446 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,482

**Total Local Effects**

13,297 jobs, \$2,091 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,238

### Total Local Effects

11,108 jobs, \$1,747 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

623

### Total Local Effects

5,590 jobs, \$879 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

313

### Total Local Effects

2,808 jobs, \$442 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,439

### Total Local Effects

12,911 jobs, \$2,030 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

330

### Total Local Effects

2,961 jobs, \$466 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## NORTH DAKOTA

### STATEWIDE

**Major Cable Operators**

Midcontinent, Cable One

**Cable Operator Employees**

448

**Total Local Effects**

4,020 direct & indirect jobs

\$0.6 billion economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# OHIO

## STATEWIDE

### Major Cable Operators

Spectrum, Comcast, Cox,  
Altice, Armstrong, Toledo Blade  
Company

### Cable Operator Employees

9,403

### Total Local Effects

84,368 direct & indirect jobs  
\$13.3 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,230

#### Total Local Effects

11,036 jobs, \$1,735 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

352

#### Total Local Effects

3,158 jobs, \$497 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,603

#### Total Local Effects

14,383 jobs, \$2,262 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

575

#### Total Local Effects

5,159 jobs, \$811 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

350

#### Total Local Effects

3,140 jobs, \$494 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

631

#### Total Local Effects

5,662 jobs, \$890 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

757

#### Total Local Effects

6,792 jobs, \$1,068 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

447

#### Total Local Effects

4,011 jobs, \$631 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

319

### Total Local Effects

2,862 jobs, \$450 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

451

### Total Local Effects

4,047 jobs, \$636 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

932

### Total Local Effects

8,362 jobs, \$1,315 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

380

### Total Local Effects

3,410 jobs, \$536 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

350

### Total Local Effects

3,140 jobs, \$494 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

321

### Total Local Effects

2,880 jobs, \$453 million economic impact

## 15TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

347

### Total Local Effects

3,113 jobs, \$490 million economic impact

## 16TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

358

### Total Local Effects

3,212 jobs, \$505 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# OKLAHOMA

## STATEWIDE

**Major Cable Operators**

Cox, Altice, Cable One

**Cable Operator Employees**

2,514

**Total Local Effects**

22,557 direct & indirect jobs  
\$3.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

553

**Total Local Effects**

4,962 jobs, \$780 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,016

**Total Local Effects**

9,116 jobs, \$1,433 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

301

**Total Local Effects**

2,701 jobs, \$425 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

308

**Total Local Effects**

2,764 jobs, \$435 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

336

**Total Local Effects**

3,015 jobs, \$474 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# OREGON

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum, Bend  
Broadband

**Cable Operator Employees**

2,828

**Total Local Effects**

25,374 direct & indirect jobs  
\$4.0 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,307

**Total Local Effects**

11,727 jobs, \$1,844 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

368

**Total Local Effects**

3,302 jobs, \$519 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

317

**Total Local Effects**

2,844 jobs, \$447 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

460

**Total Local Effects**

4,127 jobs, \$649 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

376

**Total Local Effects**

3,374 jobs, \$530 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# PENNSYLVANIA

## STATEWIDE

### Major Cable Operators

Comcast, Service Electric,  
Armstrong, Atlantic Broadband,  
Pencor Services, Spectrum

### Cable Operator Employees

14,391

### Total Local Effects

129,123 direct & indirect jobs  
\$20.3 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,472

#### Total Local Effects

13,207 jobs, \$2,077 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,452

#### Total Local Effects

13,028 jobs, \$2,049 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

2,475

#### Total Local Effects

22,207 jobs, \$3,492 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,438

#### Total Local Effects

12,902 jobs, \$2,029 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,305

#### Total Local Effects

11,709 jobs, \$1,841 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

939

#### Total Local Effects

8,425 jobs, \$1,325 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

384

#### Total Local Effects

3,445 jobs, \$542 million economic impact

### 8TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

387

#### Total Local Effects

3,472 jobs, \$546 million economic impact



## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

318

### Total Local Effects

2,853 jobs, \$449 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,015

### Total Local Effects

9,107 jobs, \$1,432 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

338

### Total Local Effects

3,033 jobs, \$477 million economic impact

## 12TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

330

### Total Local Effects

2,961 jobs, \$466 million economic impact

## 13TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

322

### Total Local Effects

2,889 jobs, \$454 million economic impact

## 14TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

515

### Total Local Effects

4,621 jobs, \$727 million economic impact

## 15TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

321

### Total Local Effects

2,880 jobs, \$453 million economic impact

## 16TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

348

### Total Local Effects

3,122 jobs, \$491 million economic impact

## 17TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

716

### Total Local Effects

6,424 jobs, \$1,010 million economic impact

## 18TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

316

### Total Local Effects

2,835 jobs, \$446 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## RHODE ISLAND

### STATEWIDE

**Major Cable Operators**

Cox

**Cable Operator Employees**

1,173

**Total Local Effects**

10,525 direct & indirect jobs  
\$1.7 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

374

**Total Local Effects**

3,356 jobs, \$528 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

799

**Total Local Effects**

7,169 jobs, \$1,127 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# SOUTH CAROLINA

## STATEWIDE

## Major Cable Operators

Spectrum, Comcast

## Cable Operator Employees

4,684

## Total Local Effects

42,027 direct & indirect jobs  
\$6.6 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

560

#### Total Local Effects

5,025 jobs, \$790 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

1,222

#### Total Local Effects

10,964 jobs, \$1,724 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

857

#### Total Local Effects

7,689 jobs, \$1,209 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

704

#### Total Local Effects

6,317 jobs, \$993 million economic impact

### 5TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

720

#### Total Local Effects

6,460 jobs, \$1,016 million economic impact

### 6TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

304

#### Total Local Effects

2,728 jobs, \$429 million economic impact

### 7TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

317

#### Total Local Effects

2,844 jobs, \$447 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## SOUTH DAKOTA

### STATEWIDE

**Major Cable Operators**

Midcontinent

**Cable Operator Employees**

893

**Total Local Effects**

8,012 direct & indirect jobs

\$1.3 billion economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# TENNESSEE

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum, Atlantic  
Broadband

**Cable Operator Employees**

4,635

**Total Local Effects**

41,587 direct & indirect jobs  
\$6.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

418

**Total Local Effects**

3,750 jobs, \$590 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

589

**Total Local Effects**

5,285 jobs, \$831 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

416

**Total Local Effects**

3,733 jobs, \$587 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

456

**Total Local Effects**

4,091 jobs, \$643 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

988

**Total Local Effects**

8,865 jobs, \$1,394 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

394

**Total Local Effects**

3,535 jobs, \$556 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

379

**Total Local Effects**

3,401 jobs, \$535 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

364

**Total Local Effects**

3,266 jobs, \$514 million economic impact

# THE CABLE OPERATOR INDUSTRY'S ECONOMIC IMPACT

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## 9TH CONGRESSIONAL DISTRICT

### **Cable Operator Employees**

631

### **Total Local Effects**

5,662 jobs, \$890 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# TEXAS

## STATEWIDE

**Major Cable Operators**

Spectrum, Altice, Comcast

**Cable Operator Employees**

18,520

**Total Local Effects**

166,170 direct & indirect jobs  
\$26.1 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

338

**Total Local Effects**

3,033 jobs, \$477 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

900

**Total Local Effects**

8,075 jobs, \$1,270 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

641

**Total Local Effects**

5,751 jobs, \$904 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

332

**Total Local Effects**

2,979 jobs, \$468 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

437

**Total Local Effects**

3,921 jobs, \$617 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

678

**Total Local Effects**

6,083 jobs, \$957 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

415

**Total Local Effects**

3,724 jobs, \$585 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

332

**Total Local Effects**

2,979 jobs, \$468 million economic impact

**9TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

372

**Total Local Effects**

3,338 jobs, \$525 million economic impact

**10TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

1,250

**Total Local Effects**

11,216 jobs, \$1,764 million economic impact

**11TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

348

**Total Local Effects**

3,122 jobs, \$491 million economic impact

**12TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

460

**Total Local Effects**

4,127 jobs, \$649 million economic impact

**13TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

309

**Total Local Effects**

2,772 jobs, \$436 million economic impact

**14TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

322

**Total Local Effects**

2,889 jobs, \$454 million economic impact

**15TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

1,175

**Total Local Effects**

10,543 jobs, \$1,658 million economic impact

**16TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

534

**Total Local Effects**

4,791 jobs, \$753 million economic impact

**17TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

569

**Total Local Effects**

5,105 jobs, \$803 million economic impact

**18TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

344

**Total Local Effects**

3,087 jobs, \$485 million economic impact

**19TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

301

**Total Local Effects**

2,701 jobs, \$425 million economic impact

**20TH CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

1,682

**Total Local Effects**

15,092 jobs, \$2,373 million economic impact

**21ST CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

1,026

**Total Local Effects**

9,206 jobs, \$1,448 million economic impact

**22ND CONGRESSIONAL DISTRICT**

**Cable Operator Employees**

318

**Total Local Effects**

2,853 jobs, \$449 million economic impact



## 23RD CONGRESSIONAL DISTRICT

### Cable Operator Employees

391

### Total Local Effects

3,508 jobs, \$552 million economic impact

## 24TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

541

### Total Local Effects

4,854 jobs, \$763 million economic impact

## 25TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

320

### Total Local Effects

2,871 jobs, \$451 million economic impact

## 26TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

374

### Total Local Effects

3,356 jobs, \$528 million economic impact

## 27TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

312

### Total Local Effects

2,799 jobs, \$440 million economic impact

## 28TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

470

### Total Local Effects

4,217 jobs, \$663 million economic impact

## 29TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

339

### Total Local Effects

3,042 jobs, \$478 million economic impact

## 30TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

350

### Total Local Effects

3,140 jobs, \$494 million economic impact

## 31ST CONGRESSIONAL DISTRICT

### Cable Operator Employees

553

### Total Local Effects

4,962 jobs, \$780 million economic impact

## 32ND CONGRESSIONAL DISTRICT

### Cable Operator Employees

318

### Total Local Effects

2,853 jobs, \$449 million economic impact

## 33RD CONGRESSIONAL DISTRICT

### Cable Operator Employees

327

### Total Local Effects

2,934 jobs, \$461 million economic impact

## 34TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

500

### Total Local Effects

4,486 jobs, \$705 million economic impact

## 35TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

324

### Total Local Effects

2,907 jobs, \$457 million economic impact

## 36TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

318

### Total Local Effects

2,853 jobs, \$449 million economic impact

# NATIONAL

## Economic Impact

\$373 billion

## Total Jobs

2.4 million direct & indirect jobs

## Industry Investment

\$290 billion over past 20 years

# UTAH

## STATEWIDE

## Major Cable Operators

Comcast

## Cable Operator Employees

1,594

## Total Local Effects

14,302 direct & indirect jobs  
\$2.2 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

#### Cable Operator Employees

328

#### Total Local Effects

2,943 jobs, \$463 million economic impact

### 2ND CONGRESSIONAL DISTRICT

#### Cable Operator Employees

346

#### Total Local Effects

3,104 jobs, \$488 million economic impact

### 3RD CONGRESSIONAL DISTRICT

#### Cable Operator Employees

353

#### Total Local Effects

3,167 jobs, \$498 million economic impact

### 4TH CONGRESSIONAL DISTRICT

#### Cable Operator Employees

567

#### Total Local Effects

5,087 jobs, \$800 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## VERMONT

### STATEWIDE

**Major Cable Operators**

Comcast

**Cable Operator Employees**

402

**Total Local Effects**

3,607 direct & indirect jobs

\$0.6 billion economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# VIRGINIA

## STATEWIDE

**Major Cable Operators**

Cox, Comcast, Spectrum

**Cable Operator Employees**

6,123

**Total Local Effects**

54,939 direct & indirect jobs  
\$8.6 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

590

**Total Local Effects**

5,294 jobs, \$832 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,555

**Total Local Effects**

13,952 jobs, \$2,194 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

350

**Total Local Effects**

3,140 jobs, \$494 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

328

**Total Local Effects**

2,943 jobs, \$463 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

345

**Total Local Effects**

3,096 jobs, \$487 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

328

**Total Local Effects**

2,943 jobs, \$463 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

339

**Total Local Effects**

3,042 jobs, \$478 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

307

**Total Local Effects**

2,755 jobs, \$433 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

337

### Total Local Effects

3,024 jobs, \$475 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

1,263

### Total Local Effects

11,332 jobs, \$1,782 million economic impact

## 11TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

381

### Total Local Effects

3,419 jobs, \$538 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# WASHINGTON

## STATEWIDE

**Major Cable Operators**

Comcast, Spectrum

**Cable Operator Employees**

5,766

**Total Local Effects**

51,735 direct & indirect jobs  
\$8.1 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,023

**Total Local Effects**

9,179 jobs, \$1,443 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

538

**Total Local Effects**

4,827 jobs, \$759 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

861

**Total Local Effects**

7,725 jobs, \$1,215 million economic impact

### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

310

**Total Local Effects**

2,781 jobs, \$437 million economic impact

### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

722

**Total Local Effects**

6,478 jobs, \$1,019 million economic impact

### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

484

**Total Local Effects**

4,343 jobs, \$683 million economic impact

### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

344

**Total Local Effects**

3,087 jobs, \$485 million economic impact

### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

771

**Total Local Effects**

6,918 jobs, \$1,088 million economic impact

## 9TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

321

### Total Local Effects

2,880 jobs, \$453 million economic impact

## 10TH CONGRESSIONAL DISTRICT

### Cable Operator Employees

392

### Total Local Effects

3,517 jobs, \$553 million economic impact

# NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

# WEST VIRGINIA

## STATEWIDE

**Major Cable Operators**

Altice, Comcast

**Cable Operator Employees**

1,068

**Total Local Effects**

9,583 direct & indirect jobs

\$1.5 billion economic impact

## DISTRICT BY DISTRICT

### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

393

**Total Local Effects**

3,526 jobs, \$554 million economic impact

### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

327

**Total Local Effects**

2,934 jobs, \$461 million economic impact

### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

348

**Total Local Effects**

3,122 jobs, \$491 million economic impact



## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## WISCONSIN

### STATEWIDE

**Major Cable Operators**

Spectrum, Comcast

**Cable Operator Employees**

4,473

**Total Local Effects**

40,134 direct & indirect jobs  
\$6.3 billion economic impact

### DISTRICT BY DISTRICT

#### 1ST CONGRESSIONAL DISTRICT

**Cable Operator Employees**

554

**Total Local Effects**

4,971 jobs, \$782 million economic impact

#### 2ND CONGRESSIONAL DISTRICT

**Cable Operator Employees**

414

**Total Local Effects**

3,715 jobs, \$584 million economic impact

#### 3RD CONGRESSIONAL DISTRICT

**Cable Operator Employees**

311

**Total Local Effects**

2,790 jobs, \$439 million economic impact

#### 4TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

917

**Total Local Effects**

8,228 jobs, \$1,294 million economic impact

#### 5TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

356

**Total Local Effects**

3,194 jobs, \$502 million economic impact

#### 6TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

1,226

**Total Local Effects**

11,000 jobs, \$1,730 million economic impact

#### 7TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

342

**Total Local Effects**

3,069 jobs, \$483 million economic impact

#### 8TH CONGRESSIONAL DISTRICT

**Cable Operator Employees**

353

**Total Local Effects**

3,167 jobs, \$498 million economic impact

## NATIONAL

**Economic Impact**

\$373 billion

**Total Jobs**

2.4 million direct & indirect jobs

**Industry Investment**

\$290 billion over past 20 years

## WYOMING

### STATEWIDE

**Major Cable Operators**

Spectrum

**Cable Operator Employees**

347

**Total Local Effects**

3,113 direct & indirect jobs

\$0.5 billion economic impact