



# The State of Broadband Affordability

*Oversight Hearing of the Communications and Conveyance Committee*

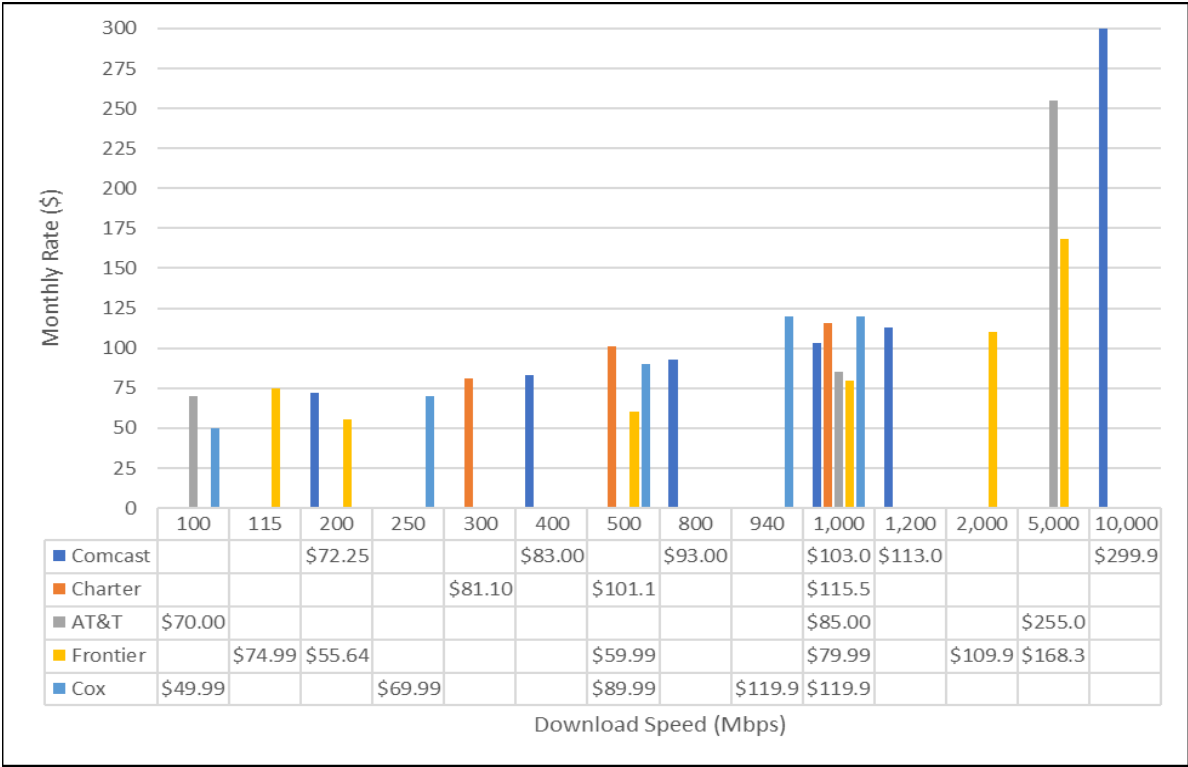
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Communications & Broadband Policy Branch

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# Cal Advocates Broadband Pricing Report

FCC Urban Rate Survey (URS) Unweighted Rates of California's Big 5 Providers in 2023

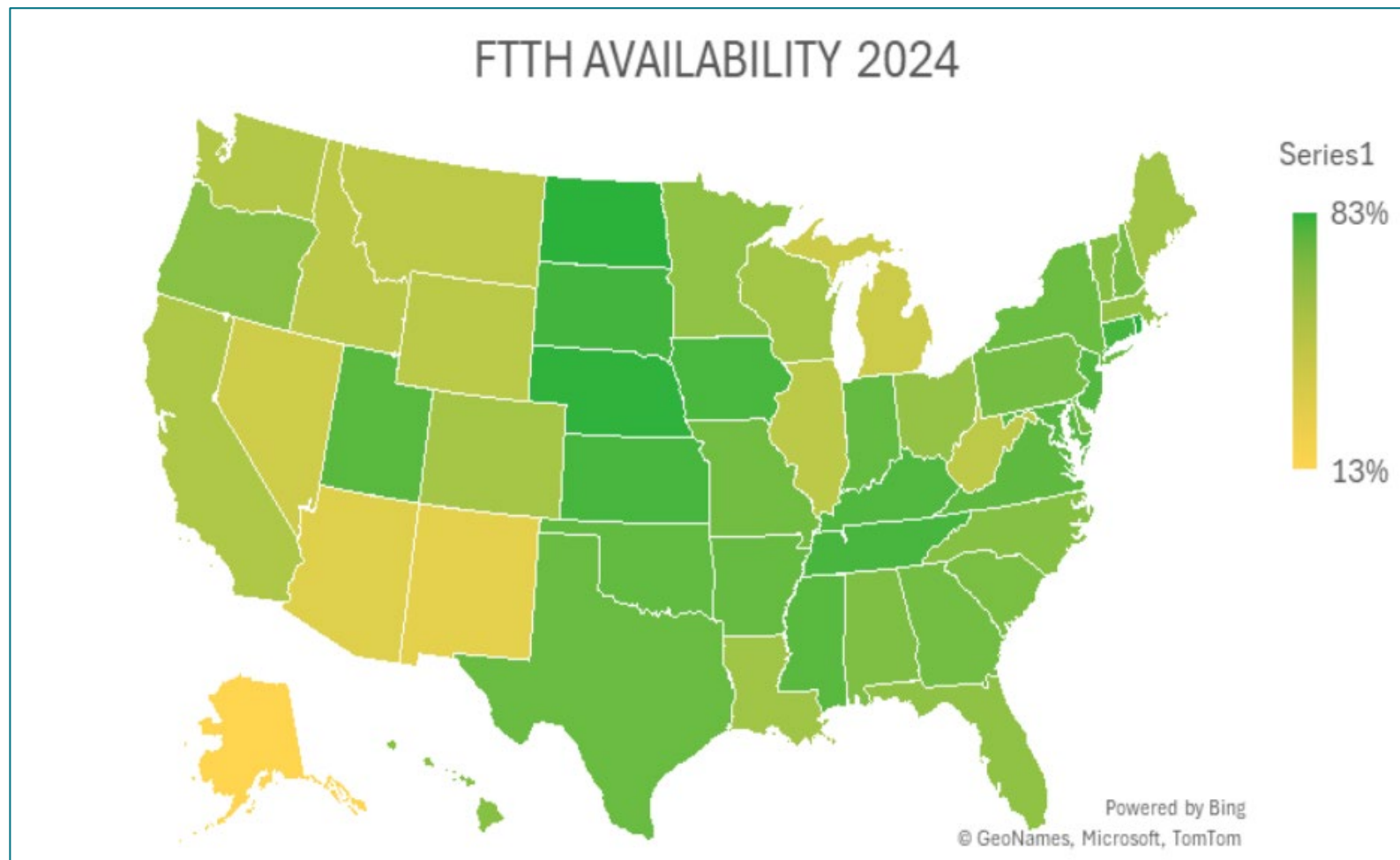


Broadband prices in California are set by the state’s largest providers: Comcast, Charter, AT&T, Frontier, and Cox – collectively known as the “Big 5.” **These providers alone serve approximately 97% of the 10.7 million broadband subscribers identified in our California pricing data report.**

Across US markets, **California is losing its competitive ranking** for broadband pricing across the country.

Speed Tiers	2021	2022	2023
<25 Mbps	#21 of 50 Markets	#23 of 48 Markets	#32 of 45 Markets
≥25 Mbps and <100 Mbps	#26 of 52 Markets	#28 of 49 Markets	#26 of 49 Markets
≥100 Mbps and <500 Mbps	#14 of 52 Markets	#20 of 50 Markets	#24 of 51 Markets
≥500 Mbps and <1000 Mbps	#8 of 48 Markets	#10 of 47 Markets	#24 of 49 Markets
≥1000 Mbps	#15 of 51 Markets	#29 of 49 Markets	#28 of 52 Markets

# California's Ranking in Fiber Penetration



Source: Fiber Broadband Association, *State of Fiber to the Home (FTTH) 2024* (May 2025).

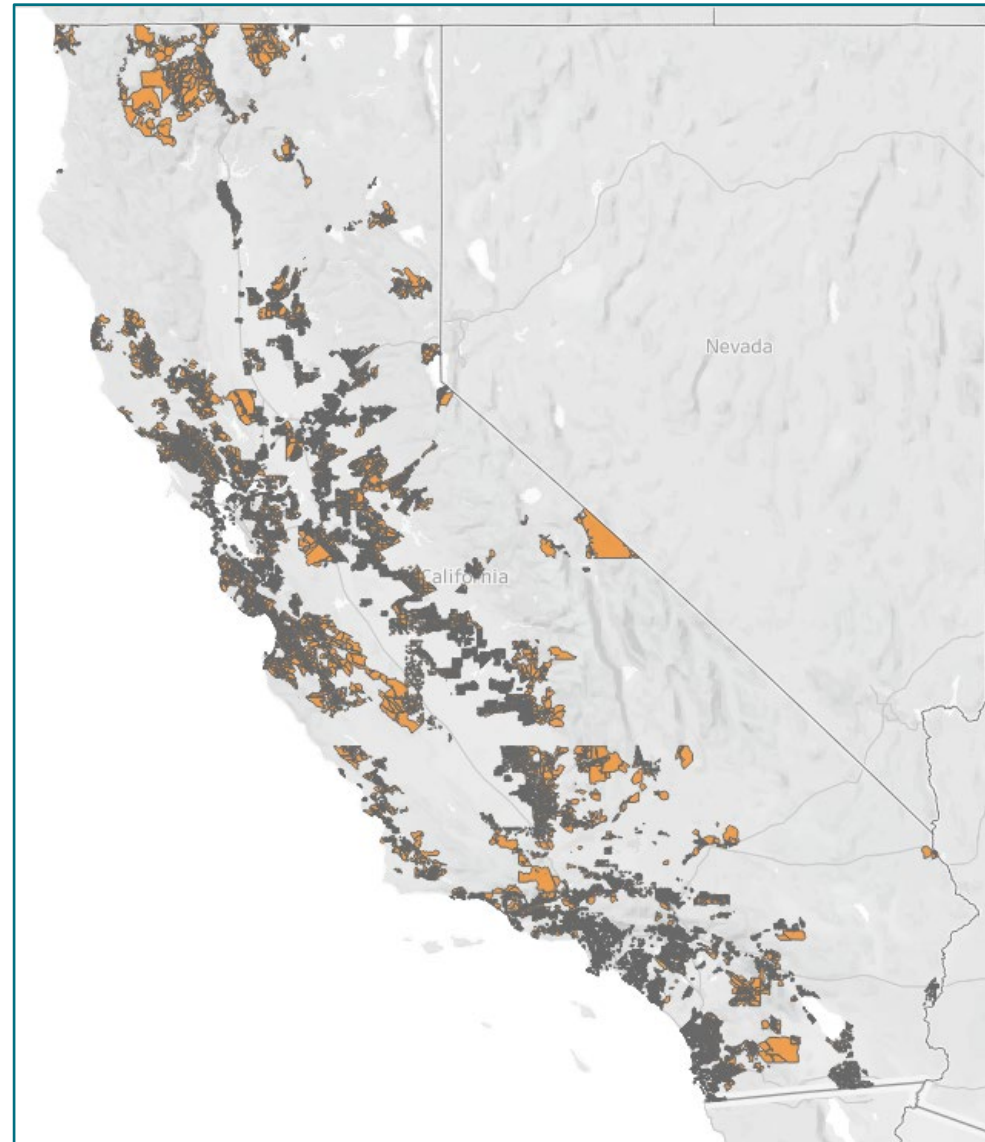
As of 2024, **California's overall fiber penetration was 39.1%.**

California ranks 39th in fiber penetration based on the latest Fiber Broadband Association analysis of FCC Broadband Service Location data.

# Key Findings of Cal Advocates Competitive Pricing Report



# Areas Predominantly Served by a Single Gigabit Provider



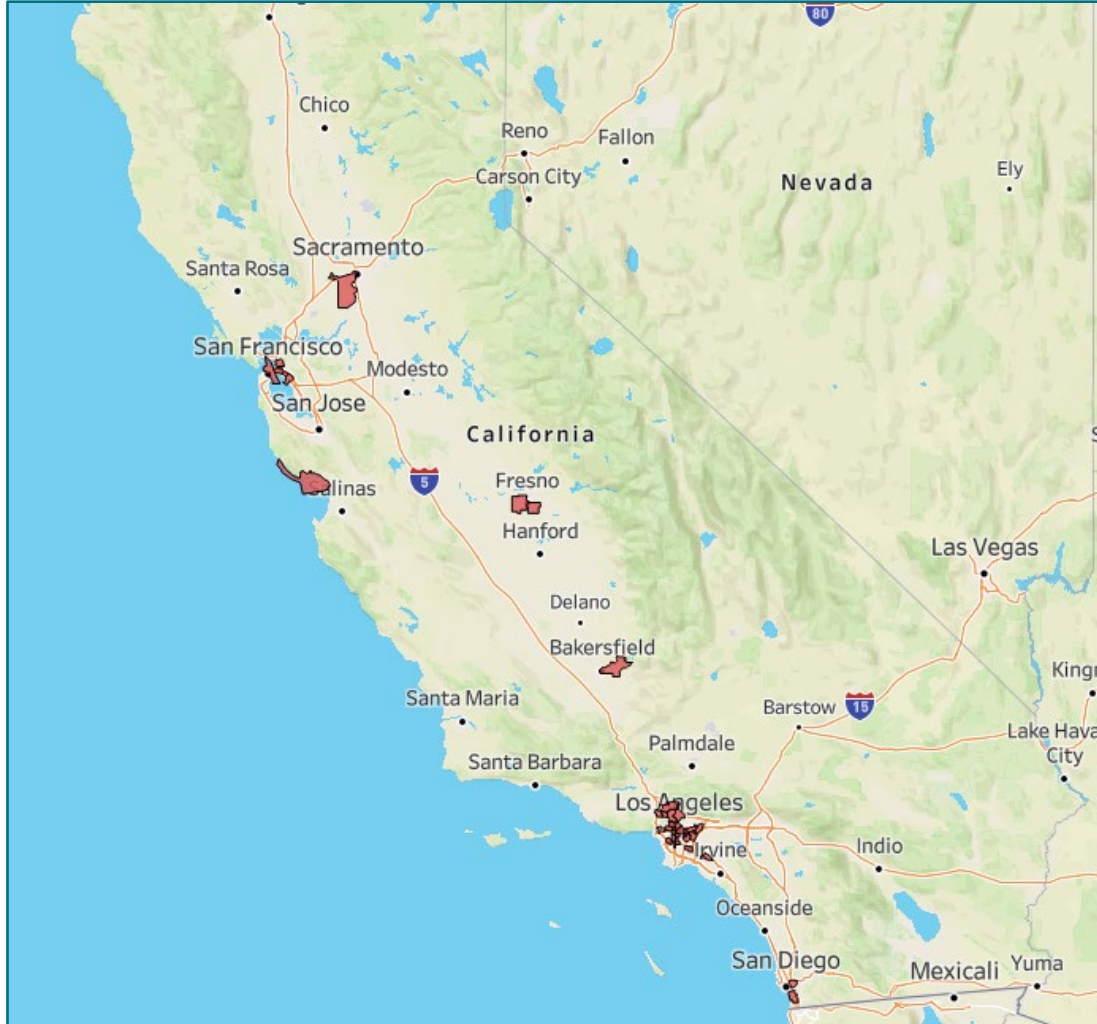
# Californians could save more than \$1 billion annually if competitive pricing prevailed statewide

Provider	300 Mbps	500 Mbps	1 Gbps
AT&T	\$55	\$65	\$53
Comcast	\$40	\$45	\$50
Charter	\$30	\$50	\$40
Cox	\$50	\$60	\$70
<b>Average Price</b>	<b>\$51</b>		

Provider	1 Gbps Monthly – Limited to No Competition Promotional Price	Benchmark Monthly Price	Monthly Savings per Consumer	Locations with Sole Gbps Provider	Total Monthly Saving	Total Annual Saving
AT&T	\$65	<b>\$51</b>	\$14	22,862	\$320,068	\$3,840,816
Charter	\$70	<b>\$51</b>	\$19	2,119,162	\$40,264,078	\$483,168,936
Comcast	\$70	<b>\$51</b>	\$19	1,800,837	\$34,215,903	\$410,590,836
Cox	\$90	<b>\$51</b>	\$39	504,937	\$19,692,543	\$236,310,516
<b>Total Saving:</b>					<b>\$94,492,592</b>	<b>\$1,133,911,104</b>



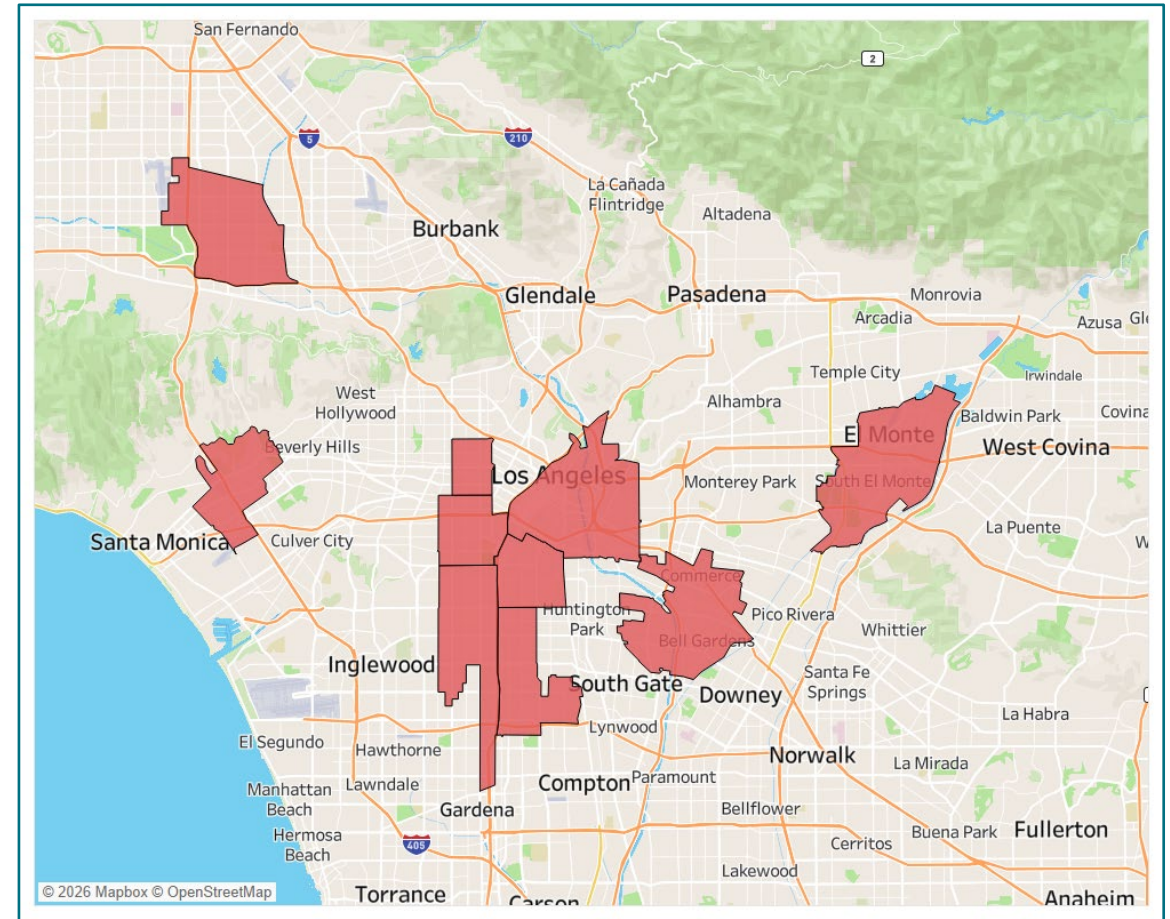
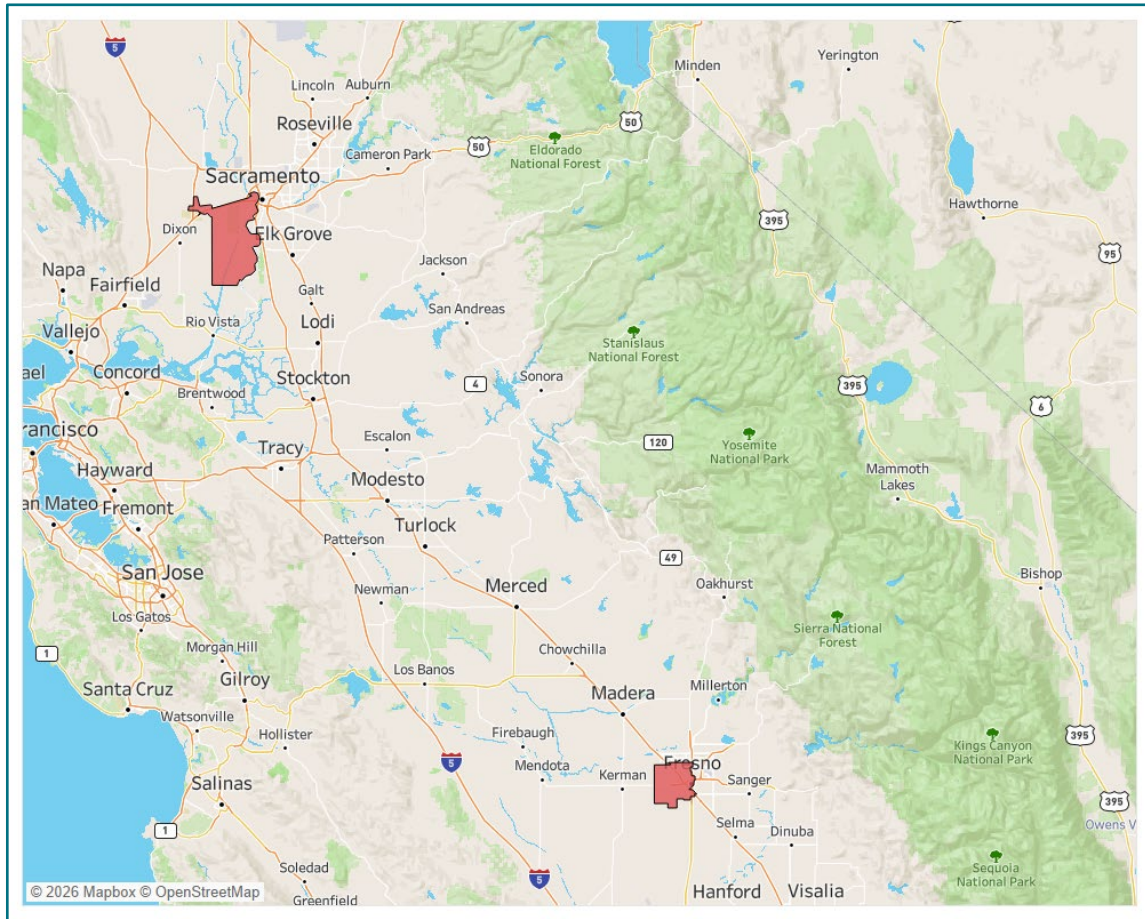
# Areas Where a \$51 Broadband Bill Is Unaffordable



## Counties

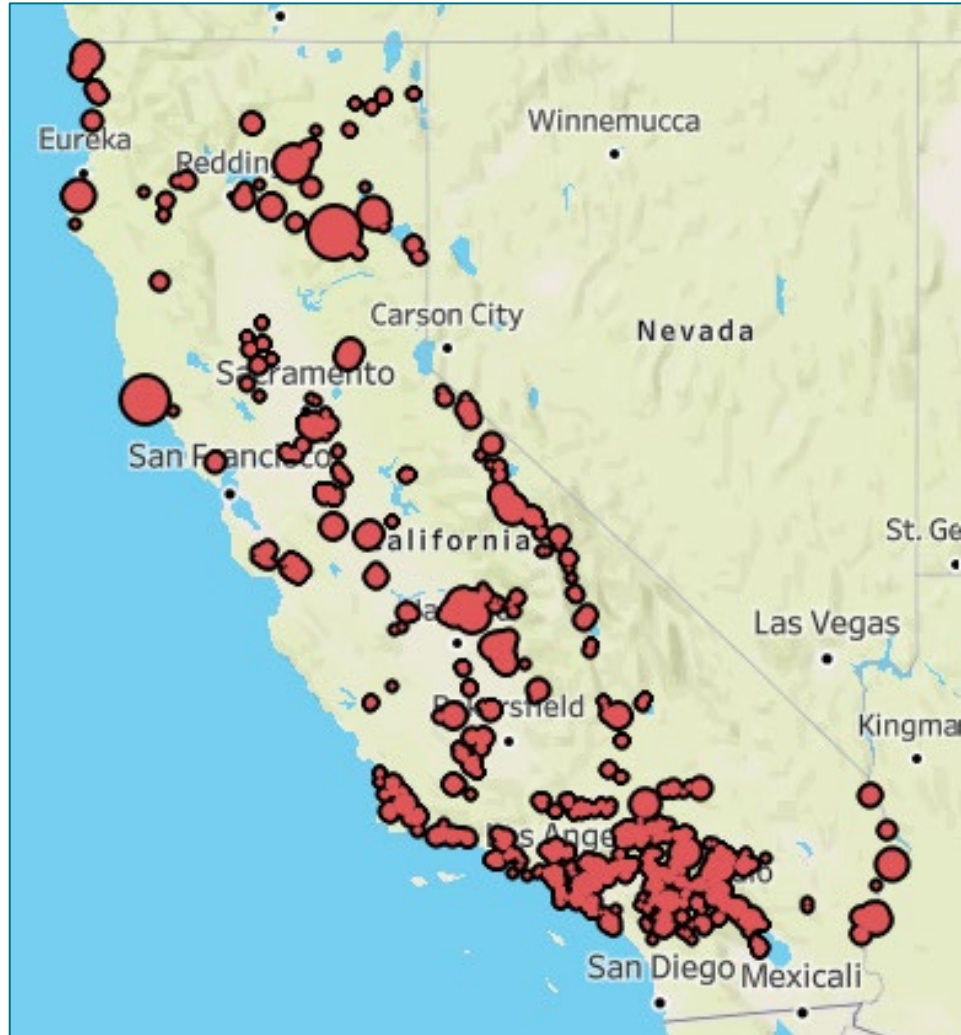
- Alameda
- Fresno
- Kern
- Los Angeles
- Orange
- San Diego
- San Francisco
- Santa Cruz
- Yolo

# Areas Where a Broadband Bill Over \$0 is Unaffordable





# Expected Locations of 75,000+ New Fiber Connections



- Dispersed high-density areas throughout the state.
- Many of these areas are adjacent to low-density areas.

# Verizon Forward (low-income discount program) will be available in all 5G Ultra Wideband cities

- Verizon Forward will be available anywhere 5G Ultra Wideband (indicated by red dots) or Verizon fiber is deployed at a fixed price of \$20.
- Verizon will combine its lowest cost offering with the CPUC's broadband subsidy at \$20, effectively bringing the cost for accessing the service to \$0.
- Current cities include Sacramento, San Francisco, Oakland, Fremont, San Jose, Fresno, Bakersfield, Los Angeles, Anaheim, Riverside, and San Diego.

