

The State of Broadband Affordability

Oversight Hearing of the Communications and Conveyance Committee

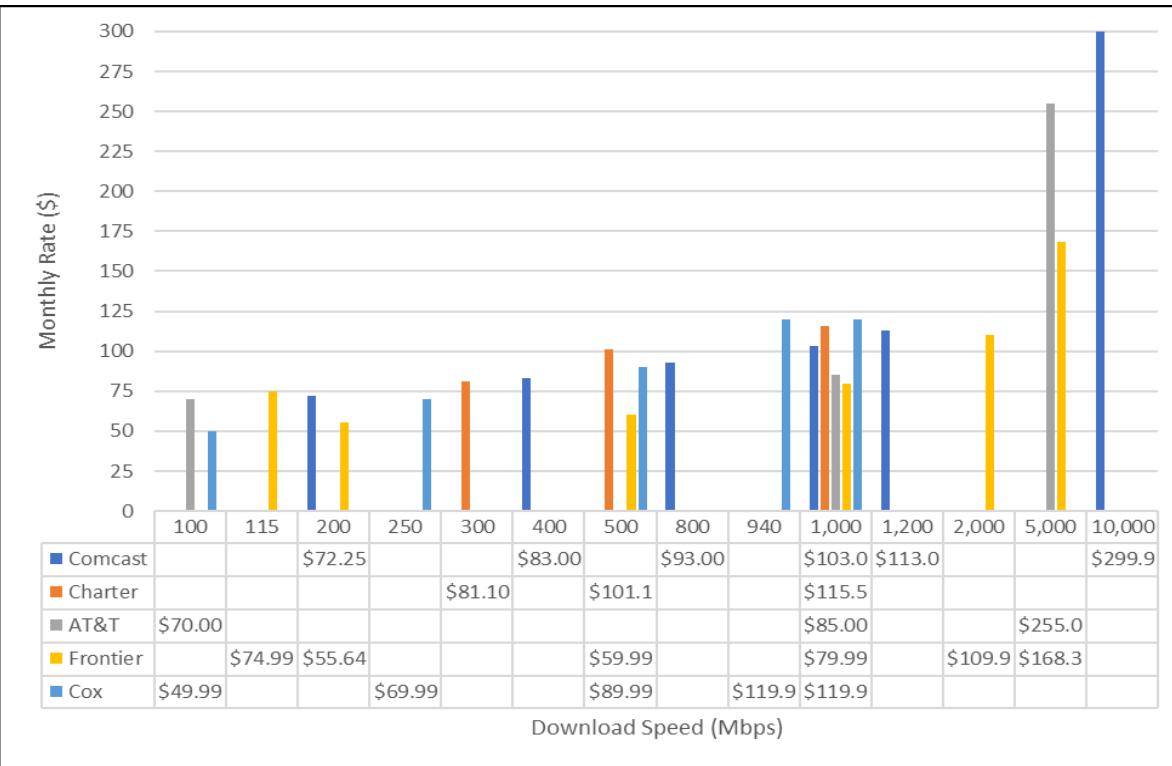
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Cal Advocates Broadband Pricing Report



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

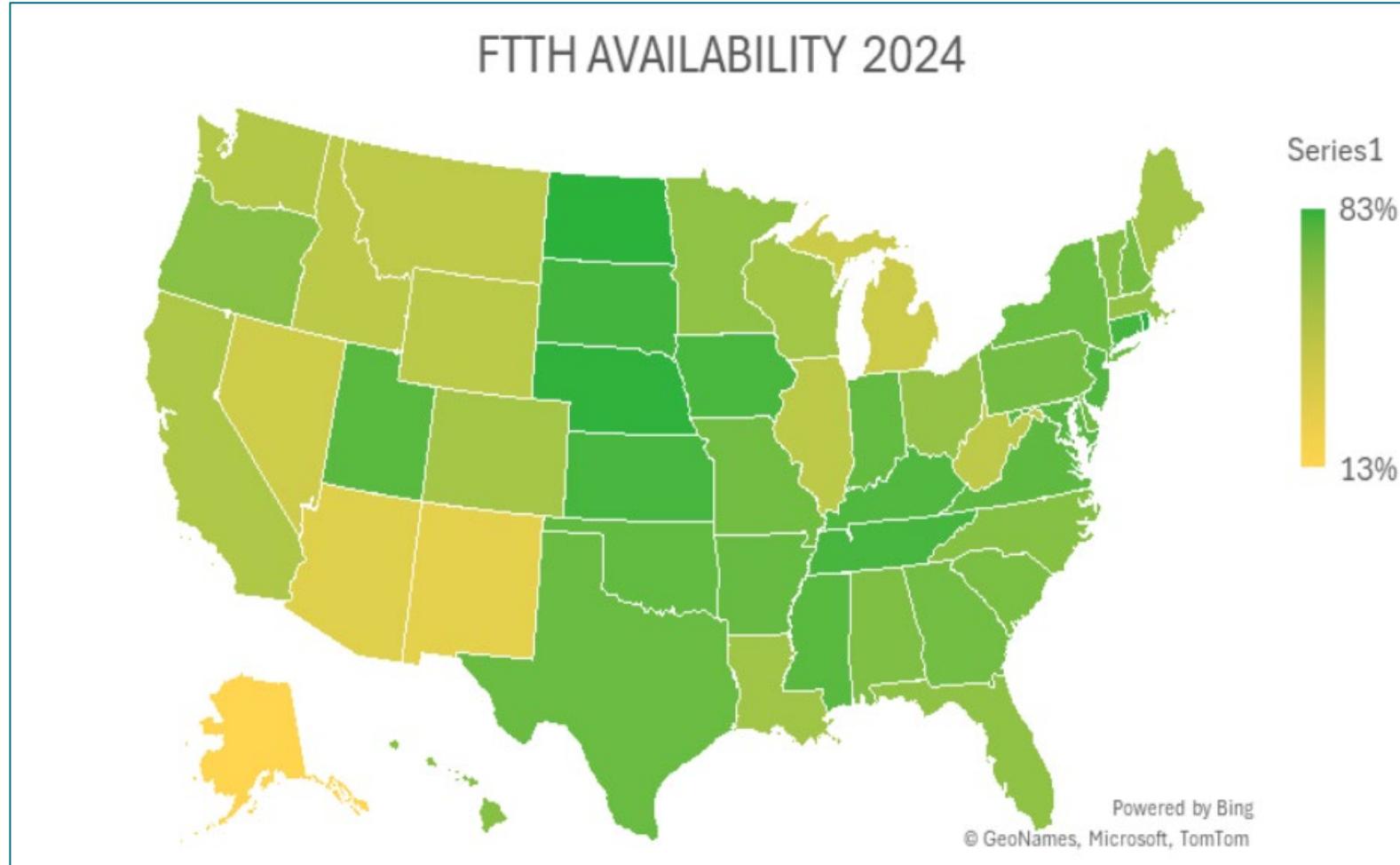


Broadband prices in California are set by the state's largest providers: Comcast, Charter, AT&T, Frontier, and Cox – collectively known as the “Big 5.” These providers alone serve approximately 97% of the 10.7 million broadband subscribers identified in our California pricing data report.

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



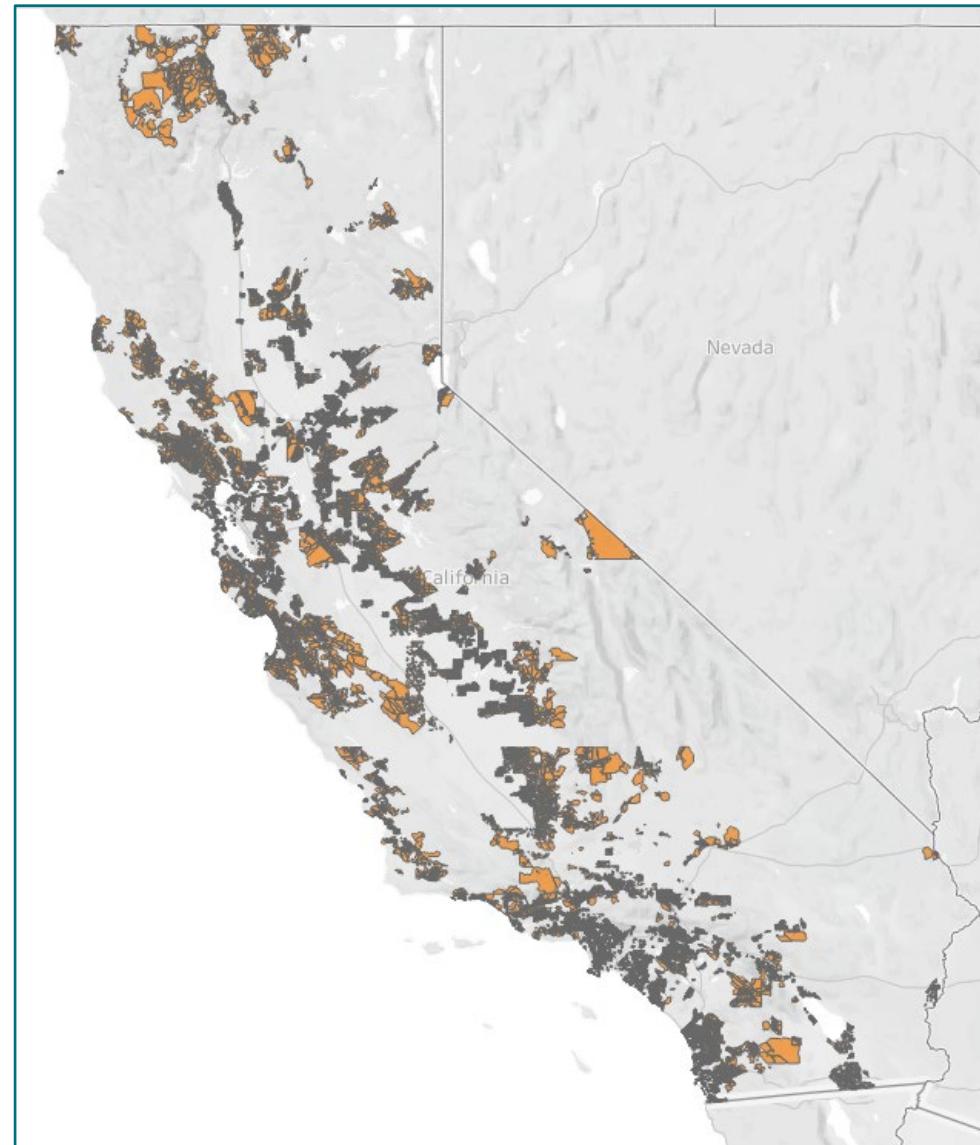
As of 2024, California's overall fiber penetration was 39.1%.

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

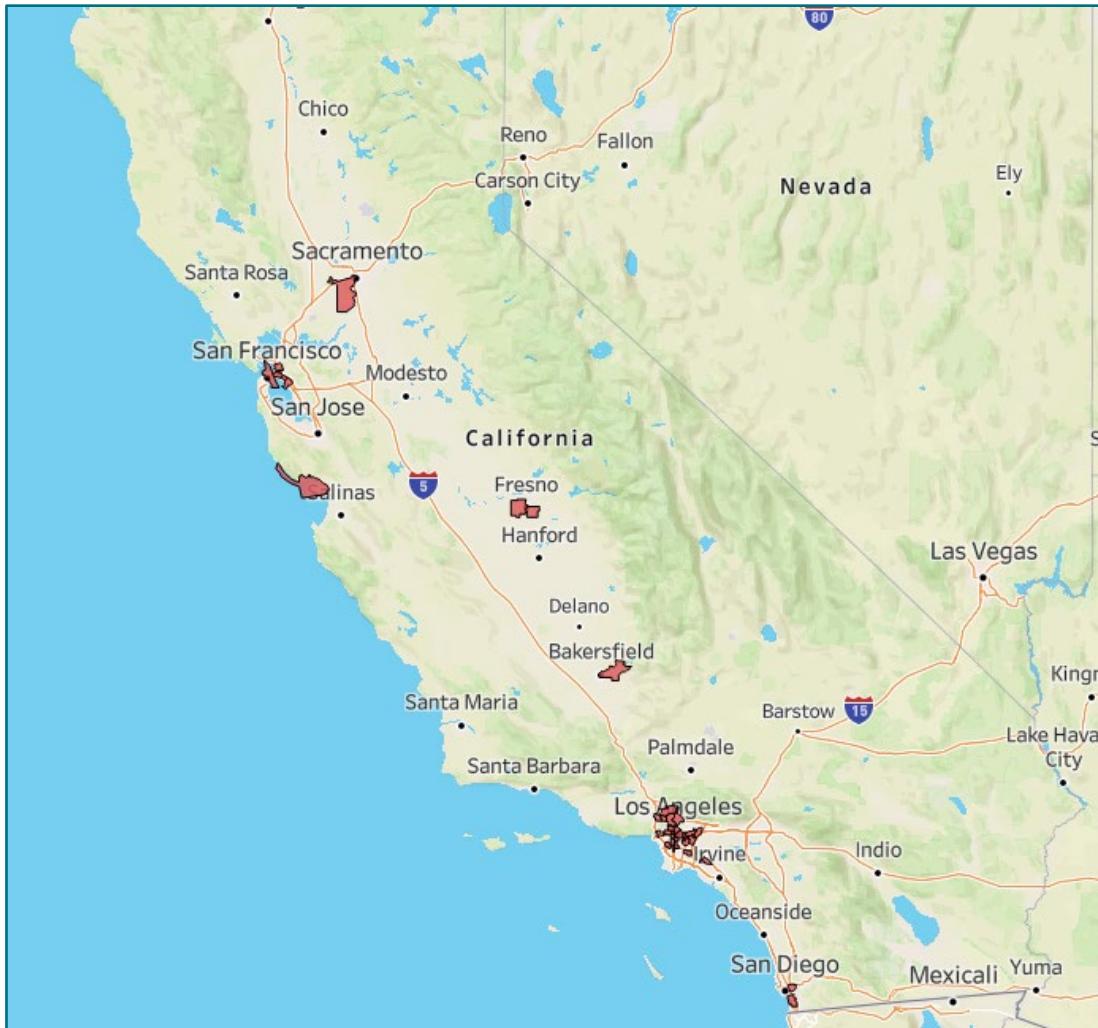


Californians could save more than \$1 billion annually if competitive pricing prevailed statewide

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

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	\$51	\$14	22,862	\$320,068	\$3,840,816
Charter	\$70	\$51	\$19	2,119,162	\$40,264,078	\$483,168,936
Comcast	\$70	\$51	\$19	1,800,837	\$34,215,903	\$410,590,836
Cox	\$90	\$51	\$39	504,937	\$19,692,543	\$236,310,516
Total Saving:					\$94,492,592	\$1,133,911,104

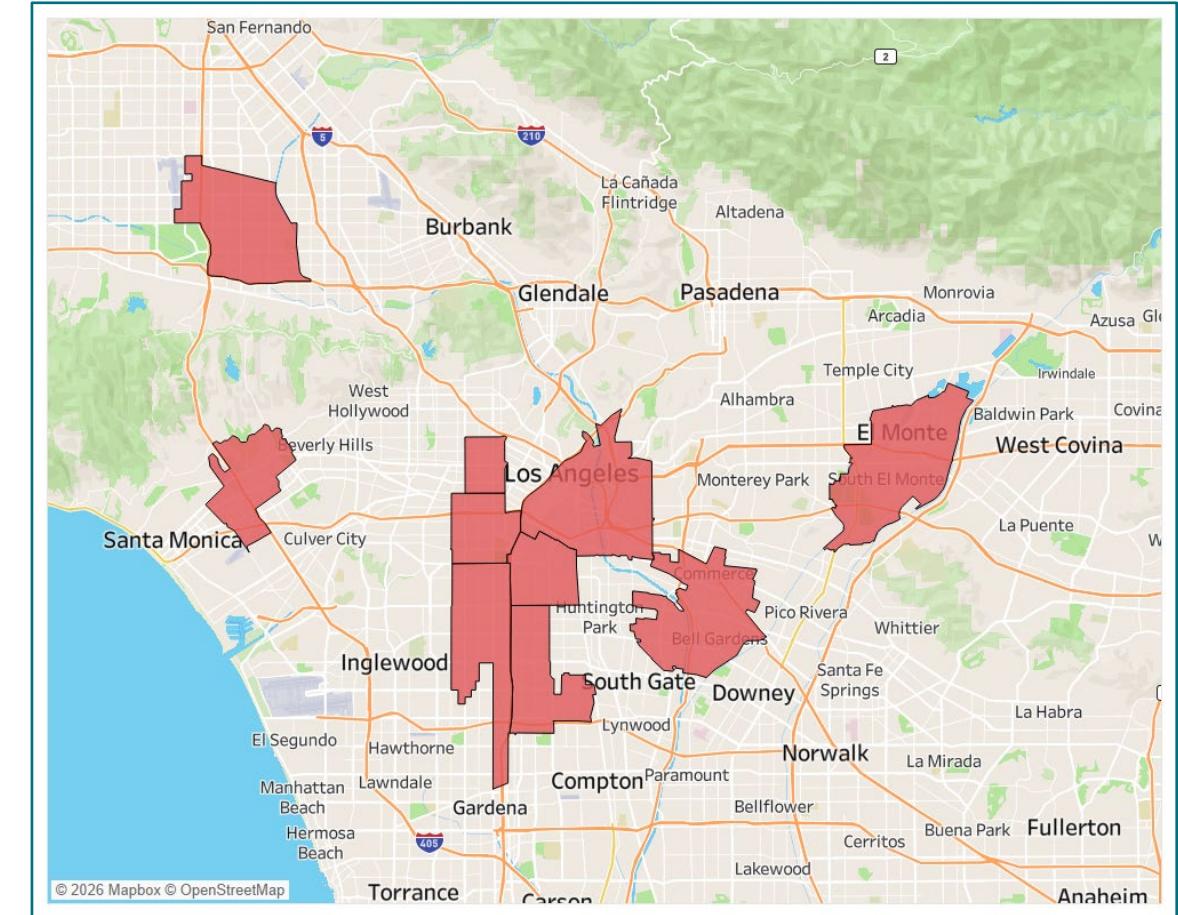
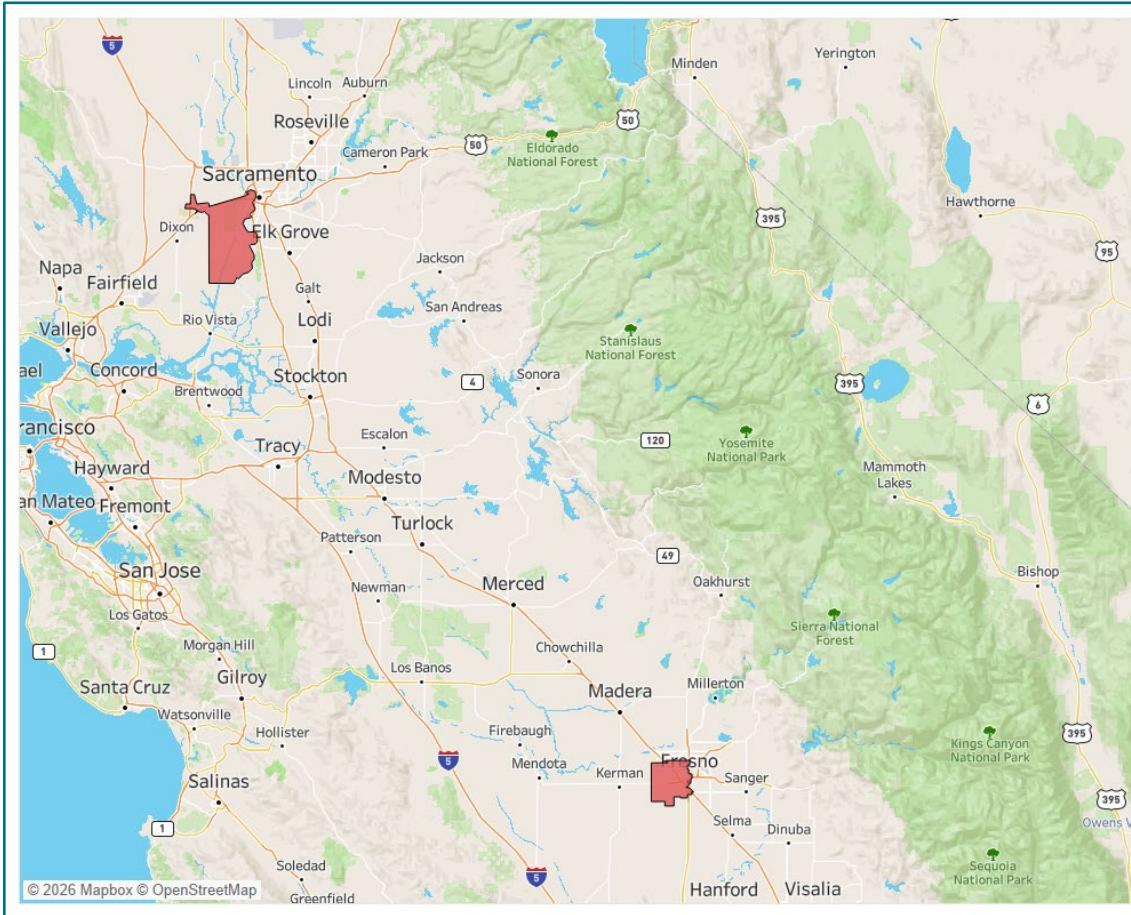
Areas Where a \$51 Broadband Bill Is Unaffordable



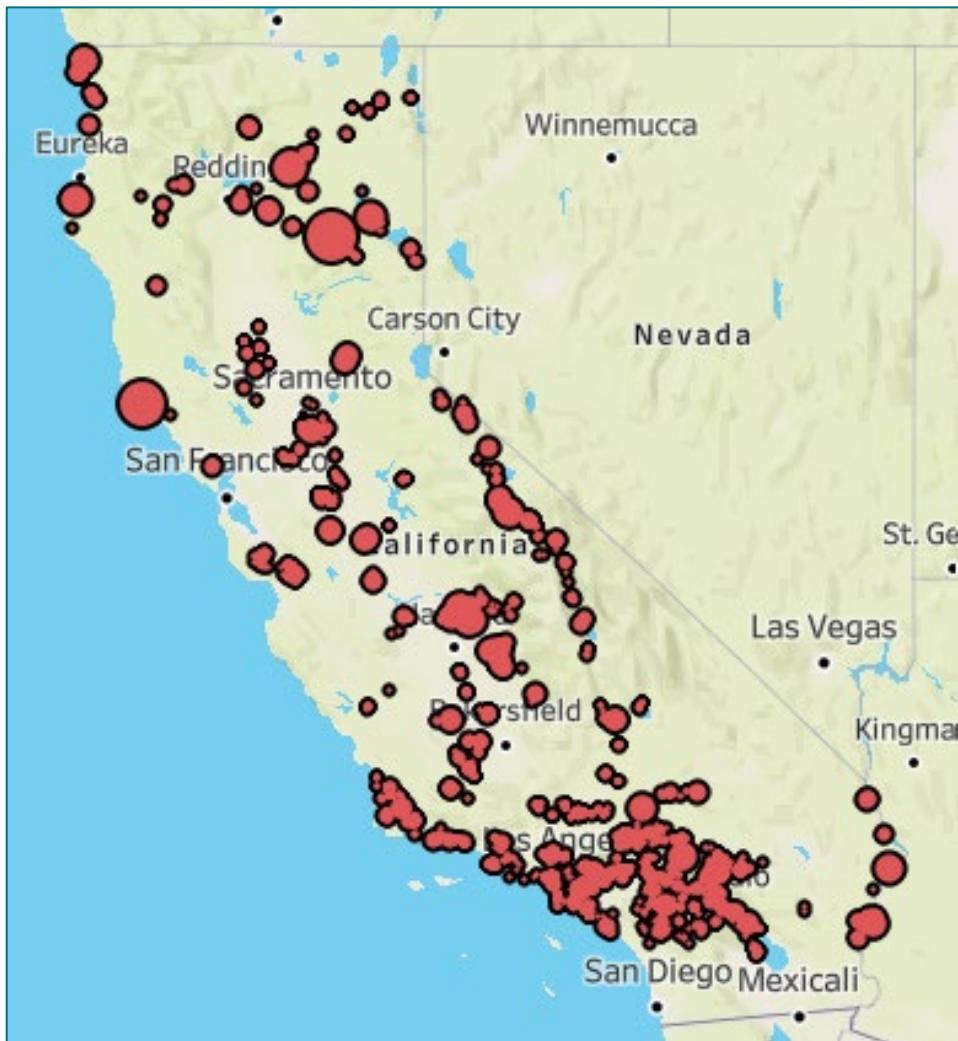
Counties

- 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.

