

Digital Infrastructure and Video Competition Act (DIVCA)

REPORT TO THE GOVERNOR AND THE LEGISLATURE

July 2025



**California Public
Utilities Commission**

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1. Introduction

The California Public Utilities Commission's (CPUC) Communications Division submits this report pursuant to the Digital Infrastructure and Video Competition Act (DIVCA) of 2006¹ and California Public Utilities Code Sections 914.3,² 914.4, and 5920. DIVCA transferred responsibility for issuing cable television franchises from cities and counties to the CPUC.³ This report includes video service-related⁴ information (i.e., subscription, deployment, and employment)⁵ self-reported as of December 31, 2023, by video franchise holders.

The passage of Senate Bill (SB) 28 (Caballero) Chapter 673, Statutes of 2021, and Assembly Bill 2752 (Wood) Chapter 801, Statutes of 2022, required the CPUC to collect granular data at the address level. This report draws on granular data to make observations about video franchise holders' service deployment and reporting practices.⁶

Overall, this report finds an employment trend of increased average wages in most occupational categories in 2023 compared to 2022. As it relates to the video franchise holder's service deployment, there is an uneven deployment across counties and across regions throughout California, in that all geographies in California do not have the same level of service deployment, as detailed in Figures 1 and 2 below.

Public Utilities Code Sections 914.4 and 5920

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

- Number of California residents employed on a full-time basis;
- Percentage of the video franchise holder's total domestic workforce residing in California;
- Number of California resident employees categorized by occupation;

¹ See California Public Utilities (Cal. Pub. Util.) Code §§ 5800 et seq. All statutory references are to the Public Utilities Code, unless otherwise noted. See also

https://leginfo.ca.gov/faces/codes_displayText.xhtml?lawCode=PUC&division=2.5.&title=&part=&chapter=&article= and http://www.leginfo.ca.gov/pub/05-06/bill/asm/ab_2951-3000/ab_2987_bill_20060929_chaptered.html.

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

³ See Cal. Pub. Util. Code § 5840(a). For a list of current video franchisees and more information about DIVCA implementation, see <https://www.cpuc.ca.gov/regulatory-services/licensing/video-franchising>.

⁴ "Video service" means video programming services, cable service, or open video system service provided through facilities located at least in part in public rights-of-way without regard to delivery technology, including Internet protocol or other technology. This definition does not include (1) any video programming provided by a commercial mobile service provider defined in Section 332(d) of Title 47 of the United States Code, or (2) video programming provided as part of, and via, a service that enables users to access content, information, electronic mail, or other services offered over the public Internet.

⁵ This report includes updates and corrections to the total number of employees and percentage of employees residing in California as of year-end 2021. All other data covers calendar year 2023.

⁶ See Cal. Pub. Util. Code § 5895, effective January 1, 2022 through SB 28-Caballero, requires granular data collection on subscribers and deployment. Specifically, Cal. Pub. Util. Code § 5895 requires the CPUC to "collect granular data on the actual locations served." The data collected are addresses and latitude/longitude data for both video deployment and subscription. The Communications Division began collecting more granular video deployment and subscription data in 2023 for information as of December 31, 2022. The information provided by video franchise holders vary in methodologies hence introducing challenges in year-by-year conclusions.

- Average wages and salaries (including benefits) categorized by occupation;
- Number of out-of-state residents employed by independent contractors that provide services to the video franchise holder, unless the video franchise holder is contractually prohibited from disclosing this information to the public; and
- Forecast of the number of net new positions expected to be created during the next year by occupation and basis (e.g., full-time, part-time, or contractor).

The video franchise holders' employees may be involved in wireline telephone, video, and/or data services. DIVCA does not require video franchise holders to categorize employees by the type of services or technologies they work on.

Varying Methodologies Used by Video Franchise Holders

Video franchise holders collect and process deployment, subscription, and employment information in a variety of ways. Most video franchise holders submitted information to the CPUC pursuant to Public Utilities Code Sections 5895 and 5920. The CPUC then aggregated the video franchise holders' data to produce this report.

The CPUC did not require video franchise holders to submit descriptions of methodologies as part of the data collection for year-end 2023 information. Starting in 2025 for the 2024 reporting year, the CPUC has required video franchise holders to submit data collection and processing methodologies along with service deployment, subscription, and employment information. Video franchise holders providing descriptions of their respective data collection and processing methodologies should improve the CPUC's understanding of the information submitted by the video franchise holders.

Disclaimer

By including self-reported information from video franchise holders in this report, the CPUC neither confirms nor refutes the accuracy of the information provided. Some video franchise holders have identified the following contributing factors for inaccuracies in data submitted to the CPUC, including differing database sources, data processing errors, insufficient geographical information, revised data collection instructions, and using third-party vendors. At present, drawing longitudinal (or year-by-year) conclusions from self-reported deployment information is challenging, and as noted above, the CPUC will continue to take steps to address factors contributing to inaccuracies.

Key Takeaways

- Understanding video franchise holders' methodologies can facilitate improvements in video franchise holders' reporting of intended and actual service deployment.⁷
- Reporting requirements for employment information have remained consistent while reporting for deployment and subscription information has recently changed.
- Transparency from video franchise holders regarding footprint maps can facilitate both the CPUC's and local entities' fiduciary responsibilities to assess franchise fees.
- The five video franchise holders with more than 750 employees are Cox Communications California, LLC (Cox), Frontier California Inc. (Frontier), DIRECTV, LLC (DIRECTV), Comcast Cable Communications Management, LLC (Comcast), and Spectrum Pacific West, LLC (Charter). These video franchise holders reported a total of 17,260 employees residing in California as of year-end 2023. Average wages increased for employees across most occupational categories in the five franchise holders with 750+ California employees between year-end 2022 and year-end 2023.
- Mismatched footprint and deployment data ranges from 0% to about 13%.⁸ Mismatches occur due to slight variations in deployment implementation or improperly reported/amended maps.
- Out of roughly 23.9 million video deployment records, only 1.2% (279,590 records) fell outside the video service area footprint map.⁹
- 22 out of 25 total video franchise holders had at least one video deployment address located outside the video service area footprint map.
- As of year-end 2023, video franchise holders reported over 4 million (4,339,291) subscriptions to linear video (or cable) services¹⁰ at a distinct service address location.¹¹
- As of year-end 2023, video franchise holders reported about 24 million (23,892,408) deployments of linear video services by serviceable location address.¹²

⁷ The CPUC's data collection for year-end 2024 includes the requirement for video franchise holders to provide information about methodologies used. See <https://www.cpuc.ca.gov/regulatory-services/licensing/video-franchising/video-data-submission-guidelines-and-templates>.

⁸ Mismatches occur due to slight variations in the video franchise holders' implementation or improperly reported/amended maps. Video franchise holders submit footprint maps designating the video service area in which the CPUC grants the company permission to operate. The video franchise holders also submit service deployment data: addresses where they can provide video service. Video service deployment addresses should fall within the footprint map of the video franchise holder's service area. When the service deployment address falls outside of the footprint map then this results in mismatched data.

⁹ By "deployment records," "deployments," "subscription records," and "subscriptions," this report refers to address-level and latitude/longitude granular data.

¹⁰ Linear video service (or cable) is traditional television service, where viewers watch programs shown on a channel's schedule. For example, if a viewer wishes to see a show, they must tune into a TV channel at a specific time. The contrast is a streaming service, in which viewers can stream content at any time. This report only considers TV or cable programming service. The report acknowledges that companies may also offer broadband service; however, the scope of the DIVCA report considers only "video service" as defined by Cal. Pub. Util. Code § 5830(s).

¹¹ In an ideal situation, a household would subscribe to only one video service provider. Hence, we use the term "distinct service address location."

¹² Deployments (or serviceable locations) can be duplicates as more video service providers choose to offer video services. In other words, multiple video service providers can provide to the same address. Hence, we use the term "serviceable location address" to make a distinction from "distinct service address location."

- Counties with the highest number of self-reported linear video services deployments are Los Angeles, San Diego, and Orange.¹³
- Counties with the lowest number of self-reported linear video services deployments are Mariposa and Sierra.¹⁴
- Video franchise holders' self-reported deployment data was aggregated to census blocks to determine which census blocks have the most video service providers.¹⁵ The census blocks with the most video service providers are located in San Diego County.

¹³ These counties contain the highest numbers of total video service deployment as defined in Cal. Pub. Util. Code § 5830(s), by total count.

¹⁴ These counties contain the lowest numbers of total video service deployments as defined in Cal. Pub. Util. Code § 5830(s) deployment, by total count. We examined the counties and the annual data sent by the companies. This is distinct from the service territory. Service territory gives us the area the company intends to serve. Annual data provides the actual location served.

¹⁵ This report uses the terms “video franchise holder” and “video service provider” interchangeably.

2. Employment Data for Year-End 2023

The five video franchise holders with more than 750 employees reported a total of 17,260 employees in California as of year-end 2023. In contrast, these same video franchise holders reported 17,769 employees as of December 31, 2022, which represents a net decrease of 509 employees. The decrease in employees was visible across all occupational categories except for sales and associates, which experienced a slight increase of 261 employees. Table 1 shows the percentage of each video franchise holder’s workforce that resides in California and the forecasts for adding net new employees during 2024. Only Charter forecasted hiring additional employees totaling 56 during 2024. Charter also has the greatest number of employees as of December 31, 2023. Comcast now has the lowest percentage of employees residing in California.

Table 1: Number of Employees as of Dec. 31, 2023, Forecasted Number of Hires for 2024, and Percentage of Employees Residing in California of the Five Largest Video Franchise Holders

Video Franchise Holder	# of Employees Dec. 31, 2023	# of New Employees Forecasted for 2024	% of Employees Residing in California
Cox	1,405	0	99.3%
Frontier	1,784	0	100%
DIRECTV	1,924	0	24.2%
Comcast	3,594	0	5.76%
Charter	8,553	56	99.7%
Total	17,260	56	

Charter plans to add 56 net new employees in 2024. These include two full-time first and mid-level officials and managers, 42 full-time sales associates, and 12 full-time craft workers.¹⁶

Who is Employed and What Do They Earn?

The five video franchise holders with more than 750 employees categorized their 17,260 employees into eight different occupational categories. Table 2 below shows the average wage, including benefits, that each video franchise holder reported for each occupational category. A triangle symbol indicates a change from the prior reporting year: ▲ reflects an increase, while ▼ indicates a decrease. If the triangle appears next to a whole number, it refers to a change in the total employee count for that occupational category. If the triangle appears

¹⁶ Craft workers are skilled tradespeople who are responsible for the construction, installation, maintenance, and repair of video service infrastructure. These workers typically have specialized training and certifications to handle tasks related to fiber-optic, coaxial, and other broadband transmission systems. A more specific classification used would be telecommunications line installers and repairers as stated by U.S. Bureau of Labor Statistics (BLS) (Occupational Classification - Telecommunications Line Installers and Repairers). See: [Telecommunications Line Installers and Repairers](#).

next to a dollar amount, it indicates a change in the average wage. If no triangle appears, there was no year-over-year change between 2022 and 2023 data.

Table 2: Employee Count & Average (Avg.) Wages (\$) on Dec. 31, 2023, Categorized by Occupation for Each of the Five Largest Video Franchise Holders

Occupational Categories		DIRECTV ¹⁷	Frontier ¹⁸	Comcast	Cox ¹⁹	Charter
Exec / Sr. Leaders	Count / Avg. Wage	0 N/A	14 ▲ \$165,657 ▼	34 ▼ \$461,864 ▲	1 N/A	5 \$608,239 ▼
Officials / Managers	Count / Avg. Wage	201 ▼ \$230,768 ▲	96 ▲ \$120,850 ▲	638 ▼ \$191,918 ▲	193 ▼ \$141,470 ▲	1,174 ▼ \$142,320 ▲
Professionals	Count / Avg. Wage	1,148 \$141,257 ▲	9 \$100,954 ²⁰	641 ▲ \$168,829 ▲	147 ▼ \$110,365 ▲	699 ▼ \$114,616 ▲
Technicians	Count / Avg. Wage	520 ▼ \$68,209 ▲	0 N/A	123 ▼ \$126,426 ▼	135 ▼ \$89,089 ▲	221 ▲ \$90,420 ▼
Sales / Associates	Count / Avg. Wage	19 ▼ \$144,469 ▼	98 ▼ \$109,403 ▲	707 ▼ \$92,586 ▼	303 ▲ \$92,938 ▼	1,959 ▲ \$81,468
Office / Clerical	Count / Avg. Wage	5 ▼ \$94,166 ▼	4 ▼ \$101,769 ▲	256 ▼ \$74,601 ▼	184 ▲ \$75,164 ▼	1,722 ▼ \$70,892 ▲
Skilled Crafts	Count / Avg. Wage	0 N/A	1,563 ▼ \$108,313 ▲	1,194 ▼ \$108,990 ▼	415 ▼ \$84,021 ▲	2,773 ▲ \$89,736 ▲
Laborers/Operatives	Count / Avg. Wage	31 ▼ \$49,075 ▲	0 N/A	1 ▲ \$63,149 ▲	27 ▼ \$58,274 ▲	0 N/A

¹⁷ DIRECTV reported lacking any Executives / Sr. Leaders and skilled crafts as of December 31, 2023. DIRECTV reported 520 technicians.

¹⁸ Frontier's professional headcount remained unchanged. The company did not provide an average wage for professionals in the DIVCA 2021 & 2022 Annual Report (Published April 2024), also available at https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/communications-division/documents/video-franchising-and-broadband-analysis/video-franchising-main/annual-reports/divca-annual-report-ye2021_2022.pdf. Instead, Frontier only submitted benefits information for its professionals for year-end 2022.

¹⁹ Cox reported one Executive/Senior Leader. Providing salary data would be individually identifiable and is excluded from this report.

²⁰ Frontier did not provide average wage for "Professionals" in the previous year's report. As such, increases or decreases from last year cannot be determined.

Skilled craft workers represent the largest employee category for four of the five video franchise holders. Within this category, Comcast reported the largest decrease in average wage, dropping 36% from year-end 2022, while Charter increased the average wage of skilled craft employees by 13%. Overall, there was a trend of increased average wages across most occupational categories for all five video franchise holders.

3. Analysis of Video Franchise Holders' Self-Reported Information: Footprint Maps and Deployment Addresses

Video Service Area Footprint Mismatches

For year-end 2023, the CPUC collected video deployment addresses from each video franchise holder and compared this data with the video franchise holders' video service area footprint maps. Public Utilities Code Section 5840(e)(6) requires the submission of a description of the video service area footprint that is proposed to be served. These footprint maps represent the geographic boundaries where the CPUC has authorized video franchise holders to provide video services. Video franchise holders may update footprint maps through amendment applications submitted to the CPUC. Amendments to the footprint map may either expand or reduce a video franchise holder's video service area. Video franchise holders must also inform local entities of video service area footprints in part due to the financial impact of potential franchise fees paid to local entities. The CPUC remains mindful of each video franchise holder's statutory obligation to not discriminate against or deny access to video service to any group of potential residential subscribers because of the income of the residents in the local area in which the group resides.²¹

When comparing the footprint maps with the video deployment map, a **mismatch** occurs when a geocoded address from the video service deployment data falls outside of the footprint territory boundaries. In other words, a mismatch is a discrepancy between two different self-reported datasets (footprint maps and deployment data) from the same video franchise holder. In theory, one could submit a very large territory map and have all service addresses fall inside the footprint map; conversely, one could submit a narrower/more precise footprint map, and the service addresses may potentially fall outside the territory more easily.

The CPUC's analysis revealed discrepancies ranging from 0% to about 13% between the video franchise holder's reported video service deployment addresses and the authorized video service area contained in footprint maps. This indicates that some video franchise holders need to provide the CPUC and local entities with more accurate information reflecting their respective video franchise footprint maps. Otherwise, video franchise holders could potentially underreport applicable franchise fees owed to local entities if these local entities remain uninformed about the extent to which video franchise holders have deployed and offered video services.

Overall, the analysis of territory and footprint mismatches reveals that:

- Of roughly 23.9 million video service deployment records, 1.2% (279,590 records) fell outside the video franchise holder's service area footprint map.
- 22 out of 25 total video franchise holders had at least one video service deployment address located outside their respective video service area footprint map.

The CPUC will take the necessary steps to resolve mismatches by requiring amendment and transfer applications to revise existing franchises and/or resubmit deployment information consistent with footprint maps.

²¹ See Cal. Pub. Util. Code § 5890.

4. Analysis of Subscription and Deployment of Video Services for Year-End 2023

This section indicates the subscription and deployment levels of video services in California using tables and maps as reported by video franchise holders for year-end 2023. Pursuant to Public Utilities Code Section 5895, the CPUC must “collect granular data on the actual locations served” from video franchise holders. Staff issued a data request on March 13, 2024, for video franchise holders to submit the following information by April 15, 2024:

- Video service deployment information: serviceable location addresses;²²
- Video service subscription information: number and location or address of video subscribers.

Video Subscription

As of year-end 2023, video franchise holders reported over 4 million (4,339,291)²³ subscriptions to linear video services.

Video Deployment

As of year-end 2023, video franchise holders reported about 24 million (23,892,408)²⁴ deployments of linear video services by serviceable location address. Multiple video franchise holders may be deployed at the same address.

Who Has Access?

Showing the deployment level of video services on a county basis also provides a relevant depiction of the availability of video services. This report considers the *annual data* reported by companies (of **actual locations** served); this differs from the video service providers’ *service footprint*, which are the **intended locations**. **Actual locations** served correspond to the annual data, which reports actual service deployments and subscriptions. **Intended locations** correspond to the video franchise holder’s footprint map (maps submitted and amended by video service providers).

Table 3 lists counties with the greatest number of video service deployment levels in descending order. For example, Los Angeles County has about 6.6 million reported deployments of video service²⁵ while Sierra and

²² “Serviceable Locations” are locations where holders have built out their video network infrastructure and to which they either currently provide service or could perform a standard video installation within 10 days without an extraordinary expenditure of resources.

²³ The Geographic Information System (GIS) software identified inaccuracies of 1,385 subscriptions for the year-end 2023 information. We excluded these 1,385 subscriptions in this report.

²⁴ The GIS software identified inaccuracies with 6,224 deployments for the year-end 2023 information. We excluded these 6,224 deployments in this report.

²⁵ When two or more video franchise holders report deployment to the same address, each of these reports are counted. For example, if two companies report deployment to Address Y, this is counted as two deployments in the total county count. In other words, when several video franchise holders are serving the same household, each of those video franchise holders contribute one count toward the 6.6 million—in the case of Los Angeles.

Mariposa Counties lack any video service deployments. Charter’s and DIRECTV’s footprint maps include areas in Sierra County, and DIRECTV’s footprint map includes areas in Mariposa County. However, Charter’s and DIRECTV’s submissions indicate a lack of video services deployment in these two counties. This means that residents of Sierra and Mariposa Counties would not have been able to purchase video services as of year-end 2023.

While we provide video service deployment by county, it is important to note that the number of reported video service deployments is specifically for the video franchise holders’ area that may not encompass the whole county. Video franchise holders may deploy video services within a county’s boundaries, but this does not imply that all addresses in that county have access.

Second, the video service deployment numbers are typically higher than video service subscription numbers; multiple video service providers may deploy video service to the same address, but a household would choose to subscribe to video services from one of these video service providers. Since there exists overlapping footprints, some addresses exist more than once in video service deployment summaries.

Table 3: Video Service Deployments as of Year-End 2023 by County

County	Video Service Deployments as of Year-End 2023
California Total	23,892,408
Los Angeles County	6,588,130
San Diego County	2,378,960
Orange County	2,070,963
Riverside County	1,586,776
San Bernardino County	1,249,026
Alameda County	1,028,476
Sacramento County	1,025,823
Santa Clara County	1,001,952
Contra Costa County	797,117
Kern County	526,039
Ventura County	516,029
San Mateo County	514,294
Fresno County	470,441
San Francisco County	415,935
San Joaquin County	373,651
Sonoma County	312,947
Stanislaus County	301,341
Placer County	279,638
Solano County	276,022
Monterey County	215,337
Tulare County	193,981
Santa Barbara County	160,143

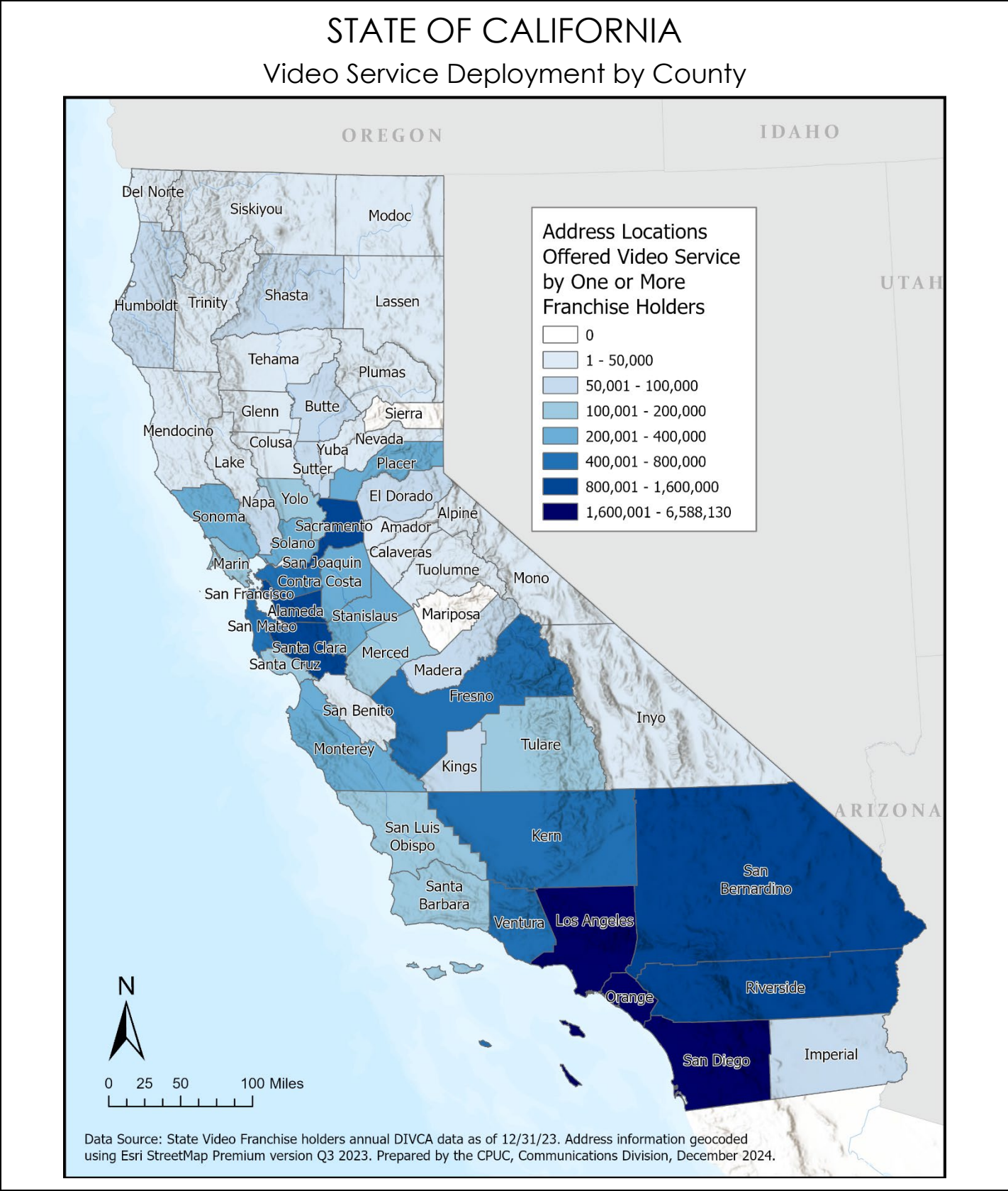
County	Video Service Deployments as of Year-End 2023
Marin County	159,723
Santa Cruz County	147,680
Yolo County	135,136
San Luis Obispo County	131,855
Merced County	102,796
El Dorado County	91,626
Napa County	86,733
Shasta County	71,178
Imperial County	64,383
Humboldt County	64,344
Butte County	61,720
Madera County	59,473
Kings County	56,581
Sutter County	55,040
Nevada County	41,452
Yuba County	39,619
Lake County	35,892
San Benito County	34,346
Calaveras County	22,088
Mendocino County	21,953
Tuolumne County	21,432
Tehama County	15,635
Siskiyou County	14,176
Amador County	13,795
Del Norte County	13,522
Mono County	13,311
Inyo County	9,033
Lassen County	6,681
Glenn County	6,466
Colusa County	5,144
Plumas County	2,531
Modoc County	1,954
Trinity County	1,515
Alpine County	574
Mariposa County	-
Sierra County	-

The map in Figure 1, “Video Service Deployment by County,” visually depicts Table 3, which provides the distribution of deployment levels by county. While examining the map, several geographical factors should be considered, including but not limited to, rural and urban geographies, coastal and inland geographies, topography, and population centers. For example, two urban counties, Los Angeles and San Diego, represent the two counties with the largest volume of video deployments while Sierra and Mariposa, two rural counties, lack the availability of any video services.

Investment in video service deployment varies geographically. Figure 1 shows that the highest concentration of deployment by county occurs in Southern California, particularly in the coastal counties of Los Angeles, Orange, and San Diego. These three counties have the highest population in the state.

Figure 1 should be compared with Figure 2, a map illustrating the number of video service franchise holders by census blocks, for a fuller picture of self-reported deployment data. Note that these are static maps, noninteractive maps, and that different geographies (counties and census tracts) may portray the data differently. Figure 1 also demonstrates where investment in cable service has occurred, and choice afforded to consumers as reported by video franchise holders. The granularity of the data collected provides more opportunities for analysis and interpretation for data analysts and policymakers.

Figure 1: Map Displaying Video Service Deployment by County



The vast majority of counties contain at least one reported deployment, with each deployment representing an address where a single Video Franchise Holder can provide video service. Table 4 shows the number of counties broken down by the range of video deployments.²⁶ Table 4 indicates that two counties (Sierra and Mariposa) lack any address to which video franchise holders have deployed video services.

Table 4: Number of Counties by Video Service Deployment Level as of Year-End 2023

Range of Video Service Deployments (Number of Locations)	Number of Counties with Deployed Video Services as of Year-End 2023
0	2
1 – 50,000	20
50,001 – 100,000	9
100,001 – 200,000	7
200,001 – 400,000	6
400,001 – 800,000	6
800,001 – 1,600,000	5
1,600,001+	3

²⁶ Franchise holders provided 23,892,408 video service deployments by actual location (e.g. address). The submitted deployment information included addresses, locations, and/or latitude and longitude coordinates. CPUC staff geocoded address information using Environmental Systems Research Institute, Inc.’s (ESRI) StreetMap Premium 2nd quarter (Q3) 2023 version.

Who Has Access to Multiple Video Service Providers?

Showing the deployment level of video services in terms of the number of video franchise holders by census block can provide a relevant depiction of the availability of video services for year-end 2023. For example, Table 5 and Figure 2 below show multiple video franchise holders competing to offer linear video services to the same potential customers. Table 5 and Figure 2 use video service deployment data from year-end 2023. This granular data offers information on the extent of video service availability.

As discussed above, we define two different kinds of spatial data: *service footprint* and *annual data*. Video franchise holders submit a service footprint map as part of the initial application for a CPUC-issued franchise. The video franchise holder may update its service footprint map through an amendment to show the locations the video franchise holder intends to serve. The video franchise holder submits to the CPUC video service annual data, deployment data, showing the locations where there is infrastructure in place to provide video service. Deployment data is reported at the census block level in Table 5 and Figure 2.

Table 5 shows that two or more video franchise holders continued to offer linear video services in about 40% of the census blocks in California,²⁷ and roughly 68% of California’s population live in these census blocks as of year-end 2023. About 28% of the census blocks still had only one video franchise holder offering linear video services; and roughly 29% of California’s population live in these census blocks.

Table 5: Multiple Video Service Providers in Census Blocks - Number and Percentage of Census Blocks by the Number of Video Franchise Holders Offering Video Services as of Year-End 2023²⁸

Number of Video Franchise Holders Offering Video Services	Number of Census Blocks	Percentage of All Census Blocks as of Year-End 2023	Population	Population Percentage
0	169,386	33% ²⁹	1,586,175	4%
1	145,081	28%	11,296,786	29%
2	194,950	38%	25,225,779	64%
3	10,286	2%	1,427,391	4%
4	19	<1%	1,879	<1%
5	1	<1%	213	<1%

²⁷ The total number of census blocks referenced in this report is 519,723.

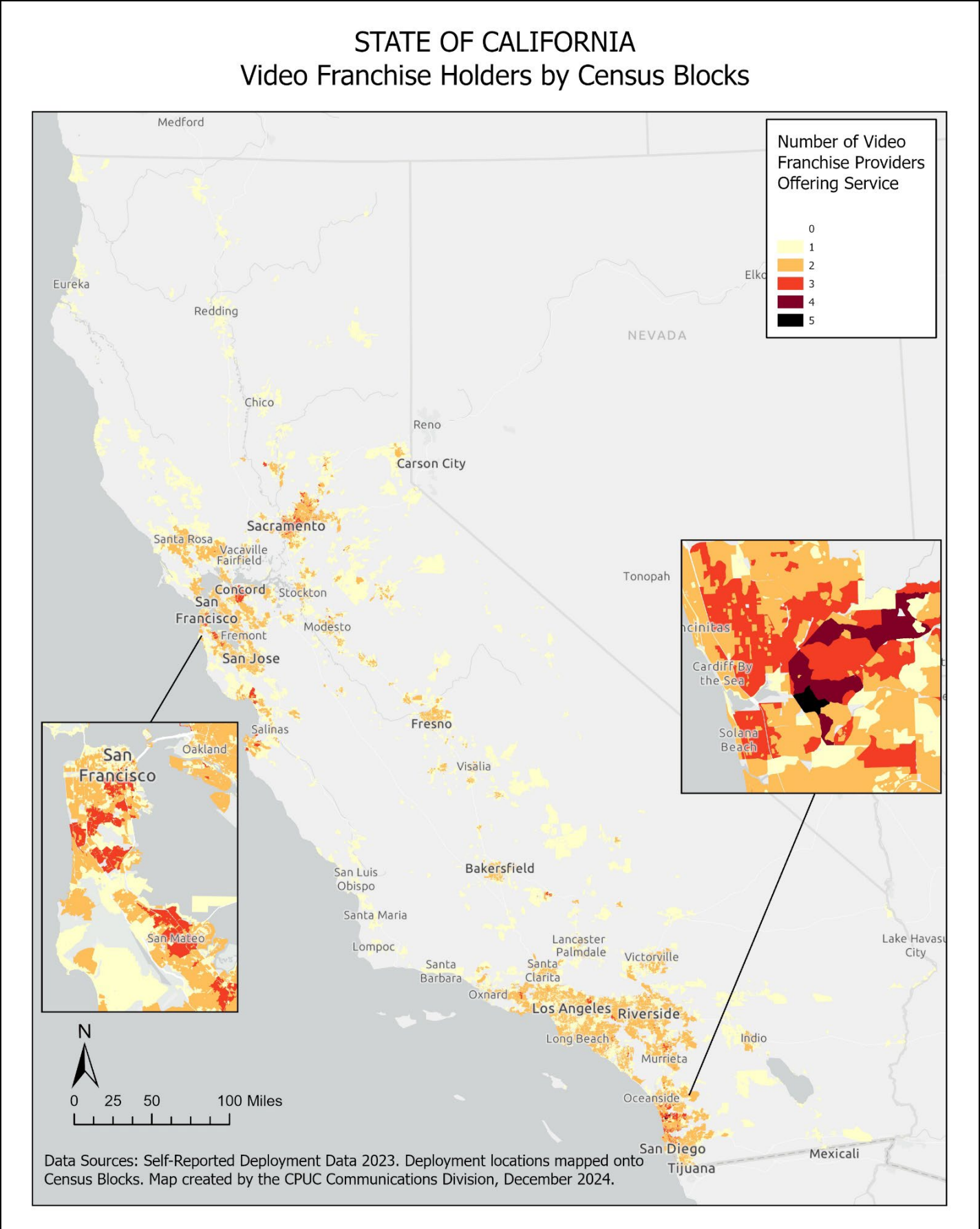
²⁸ Table 5 is based on self-reported deployment data, submitted by video franchise holders for year-end 2023. The deployments were provided as individual points (addresses) and summarized at the census block level.

²⁹ About 33% of the census blocks had zero franchise holders offering linear video services. Note that many of these census blocks have little or no population; only roughly 4% of California’s population reside in these census blocks.

The following map, Figure 2, “Video Service Franchise Providers by Census Blocks,” uses Table 5 data to visually illustrate the distribution of census blocks served by zero or up to five overlapping providers.³⁰ The map illustrates that (on the census block-level) rural or less dense areas of the state have access to only one or no video franchise holders offering video service, while the metropolitan coastal areas tend to have more choices with multiple video franchise holders offering video service in the same census blocks. The majority of Californians have a choice between two providers. The census blocks with the most options are located in San Diego County.

³⁰ Please note that the DIVCA 2023 Annual Report used footprint maps for a similar calculation in that report’s Figure 1 and Figure 4, which are not comparable to Figure 2 here. While footprint maps and deployment data are both self-reported, deployment data is reported to the CPUC on an annual basis; we have opted to use the latter in this and future DIVCA Annual Reports. The granularity of the deployment data allows us to provide an informative picture of investment locations whereas footprint data would only reflect a broader range of potential locations for deployment. Also refer to pages 7 and 18 of the DIVCA 2021 & 2022 Annual Report.

Figure 2: Video Franchise Holders by Census Block



5. Conclusion

This annual report portrays a snapshot of video franchise holder data in California. This report finds a positive employment trend in terms of increased average wages compared to the end-of-year 2022 data. The maps in this report suggest uneven deployment across counties and across regions throughout California, in that all geographies in California do not have the same level of deployment.

The CPUC will continue to improve the implementation of DIVCA's intent by collecting methodology information from video franchise holders, decreasing mismatches between service footprint maps and deployment data, and understanding on-the-ground realities for stakeholders.