

Digital Infrastructure and Video Competition Act (DIVCA)

REPORT TO THE GOVERNOR AND THE LEGISLATURE

May 2026



**California Public
Utilities Commission**

TABLE OF CONTENTS

1. INTRODUCTION	1
Key Takeaways	3
2. EMPLOYMENT DATA FOR YEAR-END 2024	4
Who is Employed and What Do They Earn?	4
3. ANALYSIS OF SUBSCRIPTION AND DEPLOYMENT OF VIDEO SERVICES FOR YEAR-END 2024	6
Video Subscription	6
Video Deployment	6
Who Has Access?	6
Who Has Access to Multiple Video Service Providers?	12
4. FRANCHISE HOLDERS' METHODOLOGY	15
5. CLOSING REMARKS	16

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 §§ 914.3,² 914.4, and 5920. DIVCA transferred responsibility for issuing cable television franchises from cities and counties to the CPUC,³ in order to have one state-wide, government agency responsible for determining which companies can qualify to become a state video franchise holder in California. DIVCA aims to increase competition and reduce barriers to market entry along with promoting deployment in a non-discriminatory manner and compliance with consumer protection laws.⁴ This report includes video service-related⁵ information (i.e., subscription, deployment, and employment)⁶ self-reported as of December 31, 2024, by 23 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.⁷

Overall, this report finds an employment trend of increased average wages in most occupational categories in 2024 compared to 2023. 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 §§ 914.4 and 5920

Public Utilities (P.U.) Code § 914.4 requires the CPUC to annually report employment-related information to the California Legislature regarding the video franchise holders. P.U. Code § 5920 requires the CPUC to collect

¹ See California Public Utilities Code (P.U. Code) §§ 5800 et seq. All statutory references are to the Public Utilities Code, unless otherwise noted. See also [Division 2.5. The Digital Infrastructure and Video Competition Act of 2006 \[5800 – 5790\]](#) and [AB 2987](#).

² [Senate Bill 28](#), repealed P.U. Code § 5960(b), which specified the information that the CPUC must report.

³ These city and county agencies were known as local franchising authorities.

⁴ See P.U. Code § 5810(a); See also P.U. Code § 5840(a). For a list of current video franchisees and more information about DIVCA implementation, see [Video Franchising](#).

⁵ Pursuant to P.U. Code § 5830(s), “‘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 § 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.”

⁶ This report includes the total number of employees and percentage of employees residing in California as of year-end 2024.

⁷ See P.U. Code § 5895, effective January 1, 2022 through SB 28-Caballero, requires granular data collection on subscribers and deployment. Specifically, P.U. Code § 5895(a) 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 continued to collect more granular video deployment and subscription data in 2024 for information as of December 31, 2023. The information provided by video franchise holders vary in methodologies hence introducing challenges in year-to-year conclusions. However, the methodology responses helped the Communications Division better understand how the franchise holders collect, store, and report their data.

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 employees residing in California categorized by occupation;
- 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 P.U. Code §§ 5895 and 5920. The CPUC then aggregated the video franchise holders' data to produce this report.

Starting in 2025 for the 2024 reporting year, the CPUC has required video franchise holders to submit their data collection and processing methodologies along with their service deployment, subscription, and employment information. The descriptions provided 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 video franchise holders' self-reported information in this report, the CPUC neither confirms nor refutes the accuracy of the information provided. For previous reports, some video franchise holders identified the following contributing factors for their respective companies' data inaccuracies 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 video franchise holder's self-reported deployment information is challenging. The CPUC will continue to take steps to address factors contributing to inaccuracies.

Key Takeaways

- Understanding video franchise holders' data methodologies can facilitate improvements in video franchise holders' reporting of intended (i.e. future planned) and actual service deployment that is necessary to understand whether video services are available to California consumers.⁸
- Transparency from video franchise holders regarding service territory footprint maps⁹ is necessary for the CPUC and local entities to carry out fiduciary responsibilities such as assessment of the franchise fees owed to local entities for the use of public right-of-way necessary to deliver service to customers.
- 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). Average wages increased for employees of these five franchise holders across most occupational categories between year-end 2023 and year-end 2024. These video franchise holders reported a total of 16,838 employees residing in California as of year-end 2024.
- As of year-end 2024, video franchise holders reported approximately 23.9 million (23,867,427) deployments of linear video services by serviceable location address.¹⁰
- Los Angeles, San Diego, and Orange counties have the highest number of self-reported linear video services deployments.¹¹

⁸ The CPUC's data collection for year-end 2024 includes the requirement for video franchise holders to describe methodologies used.

⁹ The CPUC will make video franchise holder footprint maps available through an online dashboard hosted on the CPUC's website to support public access and transparency.

¹⁰ 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 cable video service to the same address. Hence, we use the term "serviceable location address" to distinguish from "distinct service address location."

¹¹ These counties contain the highest numbers of total video service deployment by total count.

2. Employment Data for Year-End 2024

The five video franchise holders with more than 750 employees reported a total of 16,838 employees in California as of year-end 2024. In contrast, these same video franchise holders reported 17,260 employees as of December 31, 2023, which represents a net decrease of 422 employees. The decrease in employees was visible across all occupational categories. 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 2025. The five video franchise holders reported zero forecasted hiring for 2025. Charter has the greatest number of employees as of December 31, 2024, with Comcast continuing to have the lowest percentage of employees residing in California.

Table 1: Number of Employees as of Dec. 31, 2024, Forecasted Number of Hires for 2025, and Percentage of Employees Residing in California of the Five Largest Video Franchise Holders

Video Franchise Holder	# of Employees Dec. 31, 2024	# of New Employees Forecasted for 2025	% of Employees Residing in California
Cox	1,278	0	99.2%
Frontier	2,544	0	100%
DIRECTV	1,816	0	100%
Comcast	3,673	0	5.98%
Charter	7,527	0	99.82%
Total	16,838	0	

Who is Employed and What Do They Earn?

The five video franchise holders with more than 750 employees, categorized their 16,838 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 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 2023 and 2024 data.

Table 2: Employee Count & Average (Avg.) Wages (\$) on Dec. 31, 2024, Categorized by Occupation for Each of the Five Largest Video Franchise Holders

Occupational Categories		DIRECTV ¹²	Frontier	Comcast	Cox	Charter
Exec / Sr. Leaders	Count / Avg. Wage	0 N/A	44 ▲ \$186,032 ¹³ ▲	29 ▼ \$456,176 ▼	2 ▲ \$453,960 ▲	5 \$530,618 ▼
Officials / Managers	Count / Avg. Wage	190 ▼ \$248,757 ▲	151 ▲ \$124,317 ▲	587 ▼ \$197,279 ▲	179 ▼ \$147,374 ▲	1,081 ▼ \$144,340 ▲
Professionals	Count / Avg. Wage	1,096 ▼ \$148,131 ▲	73 ▲ \$79,605 ▼	610 ▼ \$170,703 ▲	146 ▼ \$114,598 ▲	654 ▼ \$115,163 ▲
Technicians	Count / Avg. Wage	478 ▼ \$71,568 ▲	0 N/A	130 ▲ \$130,524 ▲	108 ▼ \$93,318 ▲	125 ▼ \$90,651 ▲
Sales / Associates	Count / Avg. Wage	21 ▲ \$147,661 ▲	275 ▲ \$121,442 ▲	833 ▲ \$95,022 ▲	262 ▼ \$98,871 ▲	1,998 ▲ \$78,127 ▼
Office / Clerical	Count / Avg. Wage	5 \$97,585 ▲	30 ▲ \$105,038 ▲	277 ▲ \$75,964 ▲	173 ▼ \$79,259 ▲	1,147 ▼ \$76,937 ▲
Skilled Crafts	Count / Avg. Wage	0 N/A	1,971 ▲ \$110,957 ▲	1,206 ▲ \$114,164 ▲	384 ▼ \$87,529 ▲	2,517 ▼ \$94,371 ▲
Laborers/Operatives	Count / Avg. Wage	26 ▼ \$51,272 ▲	0 N/A	1 \$65,043 ▲	24 ▼ \$61,338 ▲	0 N/A

Skilled craft workers represent the largest employee category for four of the five video franchise holders. Within this category, four video franchise holders reported an increase in the average wage for year-end 2024. Overall, there was a trend of increased average wages across most occupational categories¹⁴ for all five video franchise holders.

¹² DIRECTV reported lacking any Executives / Sr. Leaders and Skilled Crafts as of December 31, 2024. DIRECTV reported 478 Technicians.

¹³ Salaries for Frontier’s Executives/Sr. Leaders category is based on a weighted average salary calculation.

¹⁴ The occupational categories showing increased average wages are: Officials/Managers, Technicians, Office/Clerical, Skilled Crafts, and Laborers/Operatives.

3. Analysis of Subscription and Deployment of Video Services for Year-End 2024

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 2024. Pursuant to P.U. Code § 5895, the CPUC must “collect granular data on the actual locations served” from video franchise holders. CPUC staff issued a data request on March 18, 2025, for video franchise holders to submit the following information by April 15, 2025:

- Video service deployment information: serviceable location addresses;¹⁵
- Video service subscription information: number and location or address of video subscribers.

Video Subscription

As of year-end 2024, video franchise holders reported over 3 million (3,211,869) subscriptions to linear video services.

Video Deployment

As of year-end 2024, video franchise holders reported approximately 23.9 million (23,867,427)¹⁶ deployments of linear video services by serviceable location address. Multiple video franchise holders may be deployed at the same address.

Who Has Access?

Showing video service deployment at the county level provides insight into the geographic availability of video services across California. This report relies on annual data reported by video franchise holders, which reflect actual locations where video service is deployed or serviceable. This differs from video franchise holders’ service footprint maps, which represent the intended service areas authorized by the CPUC and submitted or amended through franchise applications.

Table 3 lists counties with the greatest number of video service deployment levels in descending order. For example, Los Angeles County has about 6.4 million reported deployments of video service¹⁷ while Sierra and Mariposa Counties lack any video service deployments. Charter and DIRECTV’s footprint maps include areas in Sierra County, and DIRECTV’s footprint map includes areas in Mariposa County. However, Charter and DIRECTV’s serviceable location address submissions still indicate a lack of video services deployment in these

¹⁵ “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.

¹⁶ The ArcGIS Pro software identified inaccuracies with 5,075 deployments for the year-end 2024 information. These 5,075 deployments are excluded from this report. Inaccuracies consisted of addresses that were geocoded and found outside the county boundaries used for the spatial join, a geoprocessing method.

¹⁷ The data reported includes duplicates. For example, if two video franchise holders report deployment to Address Y, this is counted as two deployments in the total county count. As such, when several video franchise holders are serving the same household, each of those video franchise holders contribute one count toward the 6.4 million deployments—in the case of Los Angeles.

two counties. This means that residents of Sierra and Mariposa Counties would not have been able to purchase video services as of year-end 2024.

To aid year-over-year comparison, Table 3 includes directional indicators showing changes relative to the prior annual report. A green upward arrow (▲) indicates an increase in reported video service deployments compared to year-end 2023, while a red downward arrow (▼) indicates a decrease. These indicators reflect changes in self-reported deployment counts and may be influenced by factors such as network expansion or contraction, data corrections, and reporting methodology updates, as explained in the “Franchise Holders’ Methodology” section below.

While deployment data are presented at the county level, the reported number of video service deployments reflects only the portions of each county that fall within a video franchise holder’s authorized service area. Deployment within a county does not imply that all addresses in that county have access to video services.

Finally, video service deployment counts are typically higher than video service subscription counts. Multiple video franchise holders may deploy video service infrastructure to the same address, but a household generally subscribes to video service from only one provider. As a result, overlapping service footprints may cause individual addresses to appear more than once in aggregated deployment totals.

Table 3: Video Service Deployments as of Year-End 2024 by County

County	Video Service Deployments as of Year-End 2024
California Total	23,867,427 ▼
Los Angeles County	6,400,453 ▼
San Diego County	2,394,000 ▲
Orange County	2,040,996 ▼
Riverside County	1,573,843 ▼
San Bernardino County	1,278,341 ▲
Santa Clara County	1,035,736 ▲
Sacramento County	1,035,714 ▲
Alameda County	1,032,960 ▲
Contra Costa County	801,483 ▲
Kern County	547,237 ▲
San Mateo County	515,317 ▲
Ventura County	488,104 ▼
Fresno County	480,904 ▲
San Francisco County	412,774 ▼
San Joaquin County	393,937 ▲
Sonoma County	315,164 ▲
Stanislaus County	305,018 ▲
Solano County	278,509 ▲
Placer County	271,637 ▼
Tulare County	219,865 ▲

County	Video Service Deployments as of Year-End 2024
Santa Barbara County	215,388 ▲
Monterey County	214,682 ▼
Marin County	168,740 ▲
Santa Cruz County	148,111 ▲
Yolo County	135,777 ▲
San Luis Obispo County	131,355 ▼
Merced County	107,882 ▲
El Dorado County	90,540 ▼
Napa County	87,201 ▲
Sutter County	74,603 ▲
Shasta County	69,743 ▼
Imperial County	63,175 ▼
Butte County	62,064 ▲
Madera County	59,884 ▲
Kings County	58,792 ▲
Humboldt County	42,599 ▼
Yuba County	39,634 ▲
Nevada County	37,343 ▼
Lake County	34,615 ▼
San Benito County	34,455 ▲
Calaveras County	23,363 ▲
Mendocino County	22,276 ▲
Tuolumne County	16,872 ▼
Del Norte County	16,409 ▲
Tehama County	15,415 ▼
Amador County	14,749 ▲
Siskiyou County	14,458 ▲
Inyo County	9,237 ▲
Lassen County	7,661 ▲
Mono County	7,581 ▼
Glenn County	6,454 ▼
Colusa County	6,399 ▲
Modoc County	3,213 ▲
Plumas County	2,702 ▲
Trinity County	1,835 ▲
Alpine County	228 ▼
Mariposa County	-

County	Video Service Deployments as of Year-End 2024
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. When reviewing the map, several geographic factors should be considered, including rural and urban characteristics, coastal and inland locations, topography, and population centers. For example, Los Angeles and San Diego Counties—both highly urbanized areas—report the highest volumes of video service deployments, while Sierra and Mariposa Counties—both rural—report no video service deployments as of year-end 2024.

Investment in video service deployment varies geographically across the state. Figure 1 shows that the highest concentrations of video service deployments occur in Southern California, particularly in the coastal counties of Los Angeles, Orange, and San Diego, which also have the largest populations in California.

Figure 1 should be reviewed alongside Figure 2, which illustrates the number of video franchise holders by census block, to provide a more complete view of self-reported deployment data. These figures are static, noninteractive maps, and the choice of geographic unit (county versus census block) may present the data differently. Together, the figures highlight where video service infrastructure investment has occurred and the extent of consumer choice, as reported by video franchise holders. Granular, address-level data submitted to the CPUC enables more detailed analysis and interpretation by data analysts and policymakers.

Figure 1: Map Displaying Video Service Deployment by County - 2024

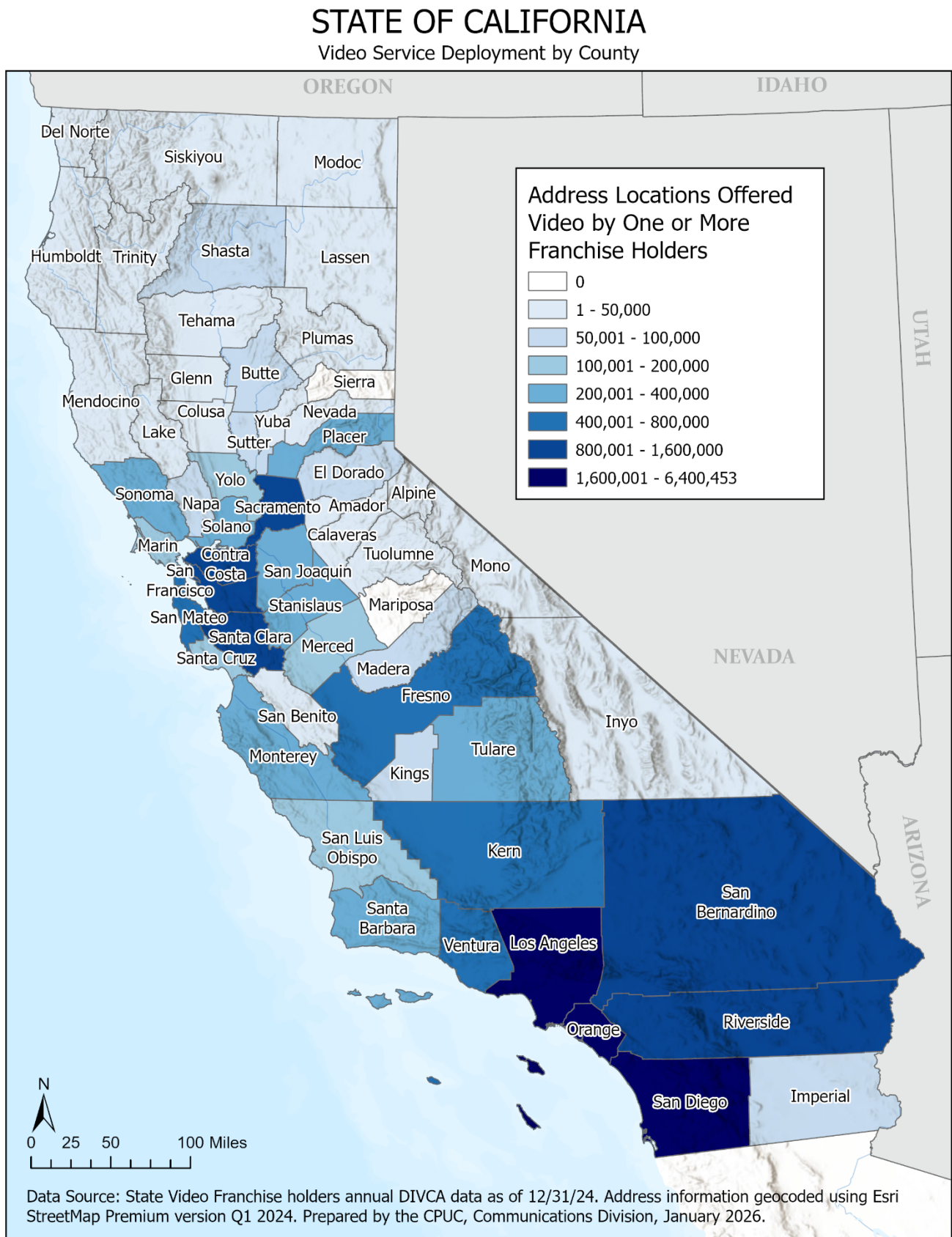


Table 4 shows the number of counties broken down by the range of video service deployments.¹⁸ 36 percent of California’s 58 counties contain between 1 and 50,000 reported deployments, with each deployment representing an address where a single Video Franchise Holder can provide video service. Sierra and Mariposa are the only two counties that lack any addresses to which video franchise holders have deployed video services.

Table 4: Number of Counties by Video Service Deployment Level as of Year-End 2024

Range of Video Service Deployments (Number of Locations)	Number of Counties with Deployed Video Services as of Year-End 2024
0	2
1 – 50,000	21
50,001 – 100,000	8
100,001 – 200,000	5
200,001 – 400,000	8
400,001 – 800,000	5
800,001 – 1,600,000	6
1,600,001+	3

¹⁸ Franchise holders provided 23,867,427 video service deployments by actual location (e.g. address). The submitted deployment information included addresses, locations, and/or latitude and longitude coordinates. Communications Division staff geocoded address information using Environmental Systems Research Institute, Inc.’s (ESRI) Street Map Premium 2nd quarter (Q1) 2024 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 2024. For example, Table 5 and Figure 2 below show multiple video franchise holders competing to offer linear video services to the same potential customers.¹⁹ The address-level granular data provided 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 video service area or 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. In addition, on an annual basis the video franchise holders submit to the CPUC video service deployment data, showing the address-level locations where there is infrastructure in place to provide video service. This deployment data is aggregated and 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 45% of the census blocks in California,²⁰ and roughly 73% of California’s population lives in these census blocks as of year-end 2024. About 24% of the census blocks still had only one video franchise holder offering linear video services; and roughly 23% of California’s population lives 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 2024²¹

Number of Video Franchise Holders Offering Video Services	Number of Census Blocks	Percentage of All Census Blocks as of Year-End 2024	Population	Population Percentage
0	163,480	31% ²²	1,434,097	4%
1	124,488	24%	9,064,850	23%
2	218,339	42%	27,343,037	69%
3	13,389	3%	1,691,097	4%
4	24	<1%	4,767	<1%
5	3	<1%	385	<1%

¹⁹ Table 5 and Figure 2 use video service deployment data from year-end 2024.

²⁰ The total number of census blocks referenced in this report is 519,723.

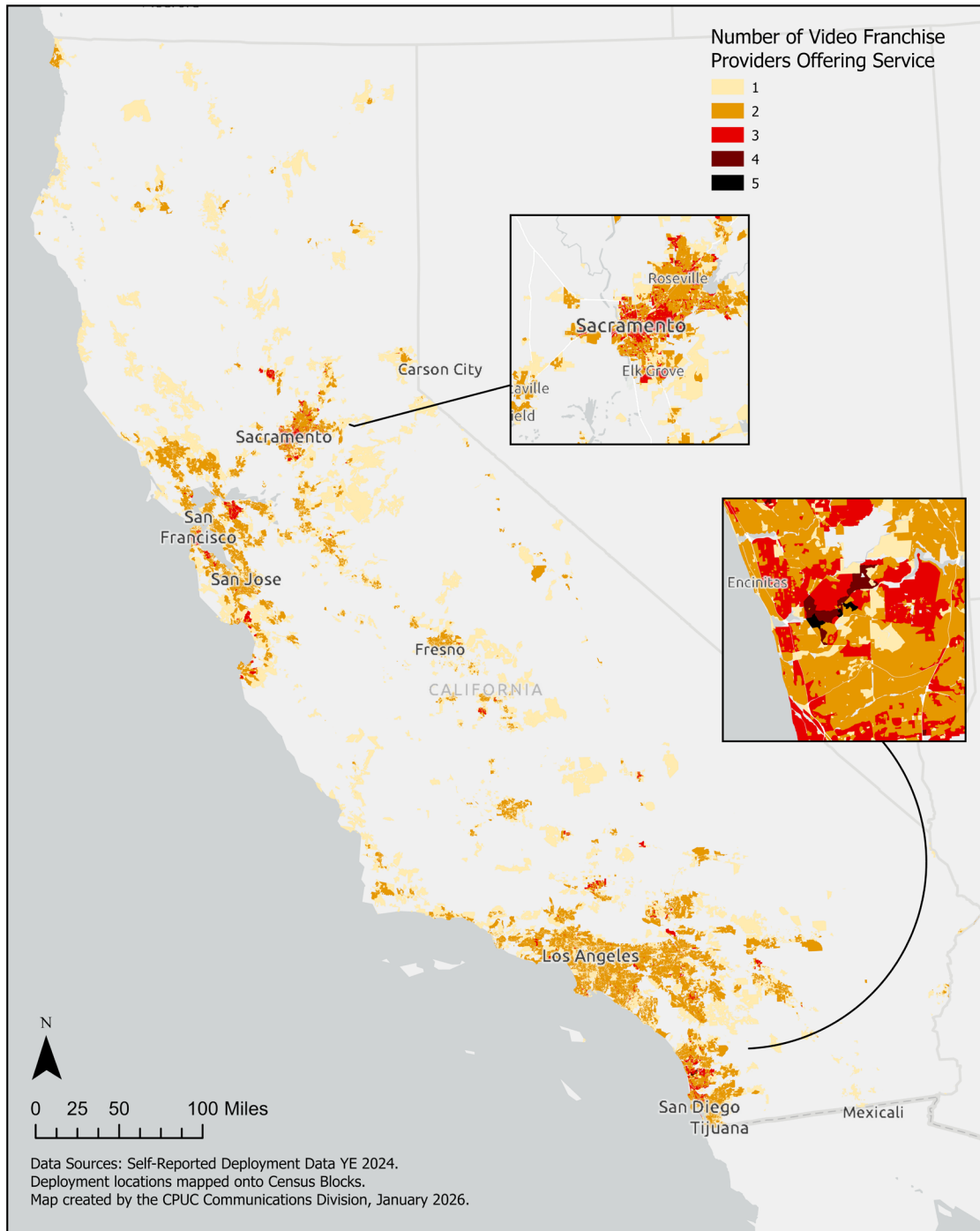
²¹ Table 5 is based on self-reported deployment data, submitted by video franchise holders for year-end 2024. The deployments were provided as individual points (addresses) and aggregated at the census block level.

²² About 31% 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 resides 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. 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, over 29 million, have a choice between two providers or more. San Diego County contains the census blocks with the most options of providers to choose from.

Figure 2: Video Franchise Holders by Census Block

STATE OF CALIFORNIA Video Franchise Holders by Census Blocks



4. Franchise Holders' Methodology

The year-end 2024 DIVCA annual data request was the first time the CPUC required video franchise holders to respond to questions about data collection methods. Video franchise holders were given specific guidance on answering the following three questions:

1. Describe how the company collects the data.
2. Describe how the company stores the data.
3. Describe how the company processes the data before sending them to the CPUC.

Guidance provided by the DIVCA team in Communications Division included:

Responses should include (at minimum but not limited to) information on software, data processing procedures, personnel, and quality control procedures. Please inform us of your methodology, in as much detail as possible.

Summary of Responses to Questions regarding Franchise Holders' Methodology.

Overall, the VFHs offered high-level explanations of their data collection methods. Subscription data is generally collected and stored through companies' billing and accounting programs, while deployment data is stored as geospatial files. Most VFHs described internal processing of this subscription and deployment data, relying on staff analysts to download and package data and supervisors and upper management to approve data before submission to the CPUC.

The descriptions of data collection methodologies give the CPUC a window into data practices of the VFHs. As Communications Division continues research on VFH's footprints, subscription, and deployment data, this methodology inquiry will guide further data requests. The most important takeaway for video franchise holders and the CPUC is an awareness of the importance of accurate and consistent data. By requiring these methodology questions, the CPUC can access the risks such as human error and year-to-year inconsistencies in reporting.

5. Closing Remarks

This annual report portrays a snapshot of video franchise holder data in California. There is a positive employment trend in terms of increased average wages compared to the end-of-year 2023 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.

Opportunities to improve the CPUC's implementation of DIVCA and collection of information on a recurring basis include the collection of methodology information from video franchise holders, comparing service footprint maps and deployment data, and understanding on-the-ground realities for stakeholders. Continuing to collect information on a granular basis, such as at an address level, will facilitate these improvements in implementation.