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**The FCC's 2024 Communications Marketplace Report:  
Time for a Broader View of Competing Broadband Services**

by

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**I. Introduction and Summary**

The Federal Communications Commission released the latest iteration of its [\*Communications Marketplace Report\*](#) on December 31, 2024. The report compiles plentiful data points from 2022 and 2023 demonstrating that more consumers than ever have access to competing and innovative next-generation fiber, 5G mobile, fixed wireless access, cable-cellular hybrid wireless, and satellite services.

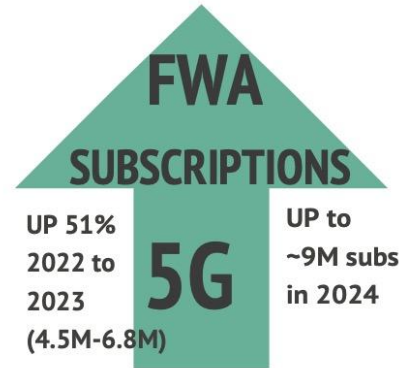
However, the Commission failed to fulfill its statutory duty to consider the effect of competition between services that use different broadband delivery technologies. As a result, compared to the 2022, 2020, and 2018 reports, the 2024 report made zero advancements in analyzing cross-platform competitive effects. Under new leadership, the FCC should abandon viewing alternative broadband delivery technologies as entirely separate and recognize there is a broader broadband market characterized by competition among fixed and mobile broadband services. An updated, more realistic, outlook regarding the competitive broadband market should guide the Commission in preparing future reports as well as in undertaking future policy actions.

Data points for 2022-2023 cited in the [2024 Communications Marketplace Report](#) include the following highlights:

- Almost 100% of the U.S. population had access to fixed satellite broadband capable of delivering 100/20 Mbps speeds at the end of 2023, and over 95% of households had another fixed broadband option even excluding satellite. About 66% have access to two competing providers offering 100/20 Mbps speeds, excluding satellite.

- Between the end of 2022 and the end of 2023, there was a 12% increase in population coverage of fiber to the premises (FTTP), from about 41% to 46% of the population.

- Fixed wireless access (FWA) competition increased, as 84% of the population had access to terrestrial fixed wireless technology by the end of 2023. FWA residential connections increased from 4.5 million to 6.8 million, up 51% between 2022 and 2023. Reportedly, 90% of new broadband chose fixed wireless in 2022.



- At the end of 2023, 93% of the population was covered by at least one 5G mobile service provider offering minimum speeds of 35/3 Mbps, 83% were covered by at least two 5G providers, and 67% were covered by at least three 5G providers.

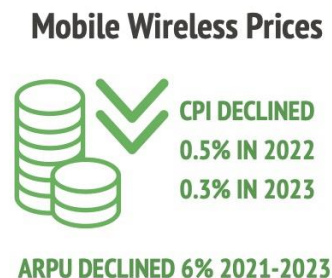
- Facilities-based competition from hybrid cable mobile virtual network operators (MVNOs) increased, with the total number of subscriptions by Spectrum Mobile and Xfinity Mobile increasing from about 7.6 million in early 2022 to about 13.4 million by the end of 2023.

- Broadband speeds increased across the board between 2022 and 2023. For instance, Ookla Speedtest shows the mean download/upload speeds for fixed broadband in 2023 was 271.4/111.8 Mbps compared to 195.5/111.8 Mbps in 2021. For 5G mobile networks, mean speeds were 243.9/22.6 Mbps in 2023, compared to 187.7/23.5 Mbps in 2021.



- Prices decreased. In 2022 and 2023 Wireless Telephone Services Consumer Price Index (CPI) prices decreased 0.5% in 2022 and decreased 0.3% in 2023, while overall CPI increased about 8% and 4.1%, respectively.

(Although the report didn't include fixed broadband pricing data, USTelecom [reports](#) inflation-adjusted prices for fixed wireline broadband providers' most popular speed tier decreased 18.1% between March 2022 and March 2023. It also [reports](#) a 9.4% drop in prices between March 2023 and March 2024.)



Importantly, industry and analyst reports available so far for 2024 regarding (1) next-generation fiber, 5G, and satellite network deployment; (2) increasing FWA, cable MVNO, fiber, and satellite subscriptions; and (3) reported competing network speed increases all indicate that the competitive conditions identified in the 2024 *Communications Marketplace Report* held steady or even improved last year.

Unfortunately, in preparing the 2024 report, the Commission failed its duty under the RAY BAUM'S Act to "consider all forms of competition, *including the effect of intermodal competition.*" Nothing in the 2024 report shows that the Commission ever considered it. The 2024 report repeats boilerplate from the 2022 and 2020 reports that fixed and mobile broadband services are "either complementary or independent of each other" because many households subscribe to both services, and the report merely posits that future 5G network advances "could alter the relationship between fixed and mobile broadband services."

The 2024 report includes an estimate that 17% of all households with paid Internet subscriptions were mobile-only for broadband access. By all appearances, the mobile-only household segment regards mobile services as a substitute for fixed services, and it is reasonable to infer that an even larger segment would consider mobile and fixed services as potential substitutes that exert competitive pressures on each other. However, the 2024 report offers never connected mobile-only household estimates or any other data to likely or potential cross-platform competitive effects on the pricing or practices of market competitors. Indeed, the report's most pronounced failure to consider the effect of intermodal competition is exemplified by the exclusion of 100/20 Mbps-capable satellite broadband services from its competing fixed provider numerical figures.

Notably, the 2024 report was accompanied by dissenting statements by Commissioners Brendan Carr and Nathan Simington that recognize its shortcomings regarding the competitive outlook and the need for an updated, realistic understanding of the communications marketplace. Gigabit-speed fiber, 5G mobile and fixed networks, next-generation satellite networks, as well as other advancements such as Wi-Fi 6 and 7 technologies, have reshaped the market from that which existed 10 or 15 years ago, and traditional product market definitions such as the "mobile telephony/broadband services" or the "wireline broadband Internet access services" are unrealistically narrow and unjustifiably hamper substantive consideration of cross-platform competition.

Today, it is likely that there is an overall broadband Internet services product market that encompasses fixed and mobile services using different platform technologies. Under new leadership, the FCC should initiate a proceeding to develop an updated understanding and competitive outlook toward the broader communications service landscape. This updated analytical framework should guide future iterations of the *Communications Marketplace Report* as well as the agency's substantive policy actions.

## **II. Report Shows the Broadband Market Was Effectively Competitive in 2022-2023**

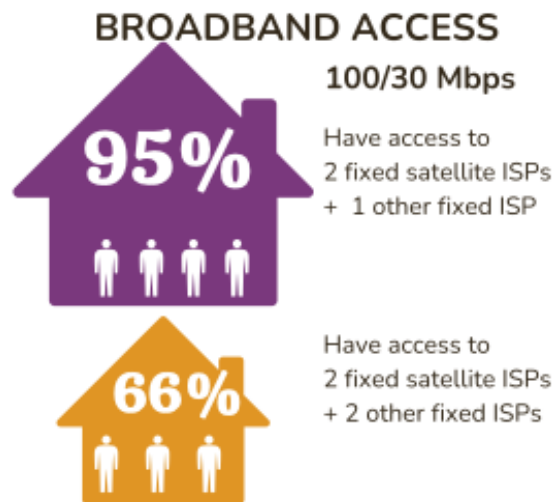
Under the RAY BAUM's Act of 2018, the FCC is required to publish and submit to committees in Congress a *Communications Marketplace Report* every two years that assesses the state of

competition in the communications marketplace.<sup>1</sup> This *Perspective from FSF Scholars* focuses on the Commission’s 2024 report’s sections pertaining to fixed terrestrial, mobile wireless, and satellite broadband market segments.

Data points for 2022-2023 contained in report show that the broadband services market is effectively competitive and fueled by innovative and as well significant private investment. During the two years under study in the report, these market conditions have benefitted consumers of high-speed broadband services with network upgrades and new deployments:

- **Increasing consumer choice among competing fixed broadband providers.**

“The December 2023 FCC BDC availability data indicate that satellite service offering 100/20 Mbps speeds is available to almost 100% of the U.S. population.”<sup>2</sup> But the Commission excluded satellite providers Starlink and EchoStar/Hughes from its competing fixed provider analysis. Thus, even excluding the choice of two competing satellite providers, as of December 2023, over 95% of households had access to one fixed provider offering 100/20 Mbps and about 66% of households had at least two other options.<sup>3</sup> “From 2022 to 2023, the percentage of households with at least three provider options for a 100/20 Mbps service increased from approximately 19% to approximately 29%.”<sup>4</sup> Additionally, “approximately 75% of the households living in urban areas had at least two provider options for 100/20 Mbps service,” whereas 35% of households in rural areas and 49% of households in Tribal areas had at least two options for 100/20 Mbps service.<sup>5</sup>



- **Increasing residential fixed broadband connections.** “Since 2020, the number of fixed residential connections in the United States has increased by approximately 8%, from approximately 112 million connections in 2020 to approximately 121 million connections in 2023.” Also, “[s]ince 2020, FTTP residential connections increased by approximately 52%, and terrestrial fixed wireless grew approximately 247%.”<sup>6</sup> In December 2023, about 61% of fixed residential connections were cable, 23% were FTTP, 9% were copper-based, 6% were terrestrial fixed wireless, and 2% were satellite.”<sup>7</sup>

<sup>1</sup> 47 U.S.C. § 163(a).

<sup>2</sup> Communications Marketplace Report, GN Docket No. 24-119, 2024 Communications Marketplace Report (“2024 report”)(released December 31, 2024), at ¶ 316, available at: <https://www.fcc.gov/document/fcc-releases-2024-communications-marketplace-report>.

<sup>3</sup> *Id.* at Appendix B, at 2; *id.* at ¶ 11.

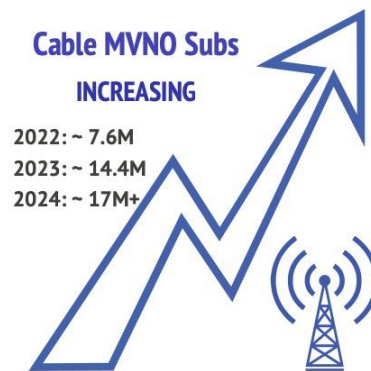
<sup>4</sup> *Id.* at ¶ 44.

<sup>5</sup> *Id.* at ¶ 45.

<sup>6</sup> *Id.* at ¶ 45.

<sup>7</sup> *Id.* at ¶ 25.

- Increasing fiber broadband access and connections.** Between the end of 2022 and the end of 2023, there was a 12% increase in population coverage of fiber to the premises (FTTP), from about 41% to 46% of the population, and “residential FTTP connections increased from 24.4 million to 28 million,” a 15% increase.<sup>8</sup> Also, between the end of 2022 and the end of 2023, “FTTP’s population coverage increased by approximately 8% in urban areas, compared to approximately 20% in rural areas,” and thus “59% of the population in urban areas and 44% in rural areas had access to FTTP technology.”<sup>9</sup>
- Increasing competitive challenges to market-leading cable fixed broadband providers.** Although “the majority of residential consumers subscribe to cable services” that use “a hybrid fiber-coaxial (HFC) technology that transmits signals over a fiber from the provider’s facility to an optical node near the consumer, “between the end of 2022 and the end of 2023, “residential connections to cable services decreased slightly from 74.5 million to 73.4 million.”<sup>10</sup>
- Increasing competition from cable wireless MVNO services.** Cable mobile virtual network operators (MVNOs) provide facilities-based competition because they rely on their extensive network of Wi-Fi hotspots and cable broadband systems in combination with leased cellular service. “Comcast [Xfinity Mobile] has increased its mobile broadband subscribers from roughly 4 million in 2021 to roughly 6.6 million in 2023, and Charter [Spectrum Mobile] has increased its mobile subscribership from roughly 3.6 million in 2021 to roughly 7.8 million in 2023.”<sup>11</sup> Cable MVNO services are also offered by Altice’s Optimum Mobile and Cox Mobile.<sup>12</sup>
- Increasing competition from 5G fixed wireless access (FWA) services.** “As of December 2023, approximately 84% of the U.S. population had access to terrestrial fixed wireless technology, and approximately 43% of the U.S. population had access to this technology with an advertised download speed of at least 100 Mbps” and “approximately 23% of the U.S. population had access to this technology with download speeds between 25 Mbps and 100 Mbps.”<sup>13</sup> Additionally, “terrestrial fixed wireless residential connections increased from 4.5 million to 6.8 million, approximately a 51% increase between 2022 and 2023.”<sup>14</sup> Also, the report cited CTIA’s finding that 90% of new broadband chose fixed wireless in 2022, up from 3% in 2020.<sup>15</sup>



<sup>8</sup> *Id.* at ¶ 20, ¶ 17.

<sup>9</sup> *Id.* at ¶ 22.

<sup>10</sup> *Id.* at ¶ 15.

<sup>11</sup> *Id.* at ¶ 153.

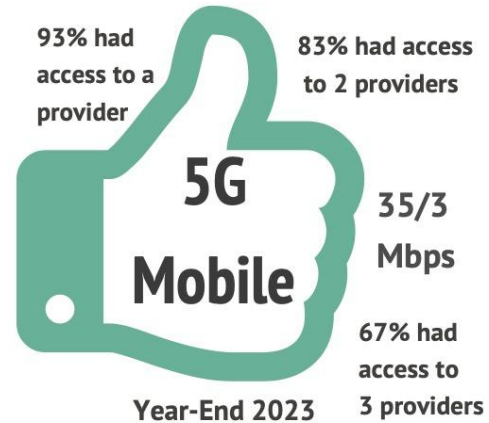
<sup>12</sup> *Id.* at ¶ 58.

<sup>13</sup> *Id.* at ¶ 21.

<sup>14</sup> *Id.* at ¶ 18.

<sup>15</sup> *Id.* at ¶ 371.

- Increasing competition from satellite broadband services.** “The December 2023 FCC BDC availability data indicate that satellite service offering 100/20 Mbps speeds is available to almost 100% of the U.S. population” by providers Hughes/EchoStar and SpaceX/Starlink,<sup>16</sup> and that “satellite residential connections increased from 1.9 million to 2 million,” a 5% increase between 2022 and 2023.<sup>17</sup>



- Increasing 5G mobile wireless competition.** At the end of 2023, 93% of the population was covered by at least one 5G mobile service provider offering minimum speeds of 35/3 Mbps, 83% were covered by at least two 5G providers, and 67% were covered by at least three 5G providers.<sup>18</sup> The three nationwide providers – AT&T, T-Mobile, and Verizon – “each reports covering at least 95% of the U.S. population and at least 68% of U.S. road miles with their 4G LTE networks, and at least 75% of the U.S. population and at least 35% of road miles with their 5G-NR networks at speeds of at least 7/1 Mbps.”<sup>19</sup> Those providers accounted for 371 million paid connections at the end of 2023. Also, aspiring fourth nationwide provider EchoStar, expanded its facilities-based network coverage to over 70% of the U.S. in 2023.<sup>20</sup>

- Increasing wireless infrastructure in operation.** The report cited Wireless Infrastructure Association (WIA) estimates that there were 153,400 standalone cellular towers operating at the end of 2023, up from 142,100 at the end of 2022. WIA also estimates that 244,800 macrocell sites were in operation at the end of 2023, up from 209,500 at the end of 2022.

**CELL SITES IN OPERATION**  
 2021: 418,887  
 2023: 432,469  
 (CTIA)

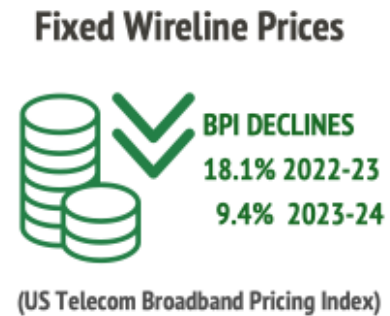


Additionally, the report cited CTIA data that there were 418, 887 cell sites in commercial use in 2021, and that the number increased to 432,469 at year-end 2023.<sup>21</sup> Furthermore, CTIA estimates that 156,787 small cells and DAS [distributed antenna systems] were in service as of year-end 2023, up from 142,057 in 2022.<sup>22</sup>

<sup>16</sup> *Id.* at ¶ 316.  
<sup>17</sup> *Id.* at ¶ 19.  
<sup>18</sup> *Id.* at ¶ 129.  
<sup>19</sup> *Id.* at ¶ 56.  
<sup>20</sup> *Id.* at ¶ 56.  
<sup>21</sup> *Id.* at ¶ 75.  
<sup>22</sup> *Id.* at ¶ 76.



- Increasing Broadband Speeds.** The report cites the Commission’s Measuring Broadband America (MBA) program findings that the weighted mean advertised download speed for participating cable broadband subscribers was 483 Mbps as of October 2022, a 58% increase compared to the prior year.<sup>23</sup> Also, the weighted mean advertised download speed for participating fiber broadband subscribers was 586 Mbps, a 15% increase compared to the prior year.<sup>24</sup> Additionally, Ookla Speedtest datasets cited in the report indicate mean download/upload speeds for fixed broadband in 2023 was 271.4/111.8 Mbps compared to 195.5/111.8 Mbps in 2021.<sup>25</sup> For 5G mobile networks in 2023, mean download/upload speeds were 243.9/22.6 Mbps compared to 187.7/23.5 Mbps.<sup>26</sup>



Importantly, rivalry among providers has helped keep consumer prices in the broadband market competitive and outperform other sectors of the economy. According to the 2024 report, in 2022 and 2023 Wireless Telephone Services Consumer Price Index (CPI) prices decreased 0.5% in 2022 and decreased 0.3% in 2023, while the Telephone Services CPI increased by 0.4% and 0.6%, and the overall CPI increased about 8% and 4.1%.<sup>27</sup> (Although the 2024 report didn’t include fixed broadband pricing data, USTelecom [reports](#) that inflation-adjusted prices for fixed wireline broadband providers’ most popular speed tier decreased 18.1% between March 2022 and March 2023.<sup>28</sup> It also [reports](#) a 9.4% drop in prices in fixed providers’ most popular speed tier between March 2023 and March 2024.<sup>29</sup>)

### III. Evidence Shows Positive Market Trends Cited in the Report Are Continuing

Readers of the Commission’s report should bear in mind that it focuses primarily on the years 2022-2023 and thus already lags behind the current state of the market. Industry and analyst reports confirm that broadband competition and innovation have held steady or even improved during 2024:

- In the third quarter of 2024, Verizon added 384,000 FWA subscribers for a total of 2.67 million – 1.64 million residences and 1.03 million businesses, AT&T gained 135,000 subscribers to its Internet Air FWA service to bring its total up to about 500,000, and T-

<sup>23</sup> *Id.* at ¶ 15.

<sup>24</sup> *Id.* at ¶ 17.

<sup>25</sup> *Id.* at ¶ 334, Appendix G, ¶ 42.

<sup>26</sup> *Id.* at ¶ 336, Appendix G, ¶ 46.

<sup>27</sup> *Id.* at ¶ 87.

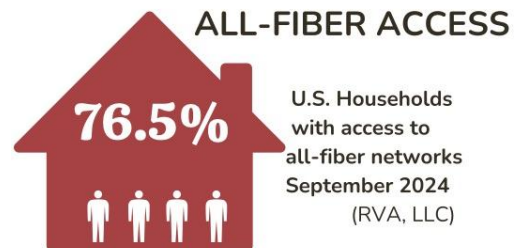
<sup>28</sup> Arthur Menko, Business Planning, Inc. “2023 Broadband Pricing Index: Broadband Prices Continue to Decline” (October 11, 2023) (published by USTelecom), at: <https://ustelecom.org/wp-content/uploads/2023/10/USTelecom-2023-BPI-Report-final.pdf>.

<sup>29</sup> Arthur Menko, Business Planning, Inc. “2024 Broadband Pricing Index: Broadband Prices Continue to Decline As Consumers Choose Faster Speeds” (December 16, 2024) (published by USTelecom), at: <https://ustelecom.org/wp-content/uploads/2024/12/USTelecom-2024-Broadband-Pricing-Index.pdf>.

Mobile gained 541,000 subscribers to its Home 5G FWA service, to bring its total up total of over 6 million.<sup>30</sup>

- Cable MVNO subscriptions increased to 9.4 million for Spectrum Mobile and Xfinity Mobile surpassed 7.5 million subscriptions by the end of the third quarter of 2024.<sup>31</sup>

- EchoStar certified that its competing 5G network expanded to cover 80% of the population by the end of 2024.<sup>32</sup>



- From September 2023 to September 2024, all-fiber broadband network availability to U.S. households reportedly climbed 13%, to 76.5%.<sup>33</sup>
- Satellite broadband provider Starlink reportedly surpassed 1.3 million U.S. subscribers in late 2023, and that number likely is substantially higher, with SpaceX affirming that Starlink served over 4 million subscribers worldwide in late 2024.<sup>34</sup> Deployment of new satellites has enabled higher capacity and speeds compared to early 2022.
- Wi-Fi 7 devices are being deployed in the market, which will enable more bandwidth and faster speeds for broadband consumers.<sup>35</sup>

Those examples – which are by no means exhaustive – indicate that positive broadband market trends identified in the 2024 report have continued.

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<sup>30</sup> See sources cited in Seth Cooper, “FWA Makes Further Strides, More Spectrum and Cell Cites Needed,” *FSF Blog* (November 15, 2024), at: <https://freestatefoundation.blogspot.com/2024/11/fwa-make-further-strides-more-spectrum.html>.

<sup>31</sup> See Charter Communications, Press Release: “Charter Announces Third Quarter 2024 Results” (November 1, 2024), at: <https://corporate.charter.com/newsroom/charter-communications-announces-third-quarter-2024-results>; and Comcast, Press Release: “Xfinity Mobile & Comcast Business Surpass 7.5 Million Lines” (October 31, 2024), at: <https://corporate.comcast.com/stories/xfinity-mobile-seven-million>.

<sup>32</sup> See EchoStar, Report: “Monitoring DISH’s Compliance with Conditions Granting an Extension of Time to Complete Construction of Facilities and Buildout Commitments,” WT Docket No. 22-212 (filed January 10, 2025), at: <https://www.fcc.gov/ecfs/search/search-filings/filing/1011082930532>.

<sup>33</sup> See RVA, LLC, “The State of The North American Fiber Deployment” (December 2024) (filed December 13, 2024 as an attachment to an *ex parte* submission by the Fiber Broadband Association in the FCC’s 2024 report proceeding), at: [https://www.fcc.gov/ecfs/document/121320060561/1?utm\\_source=substack&utm\\_medium=email](https://www.fcc.gov/ecfs/document/121320060561/1?utm_source=substack&utm_medium=email).

<sup>34</sup> See Michael Kan, “SpaceX: Starlink Now Has 1.3 Million Customers in the US,” *PCMag* (December 13, 2023), at: <https://www.pcmag.com/news/spacex-starlink-now-has-13-million-customers-in-the-us>; Michael Ken, “SpaceX’s Starlink Adds 1 Million Users in 4 Months,” *PCMag* (September 27, 2024), at: <https://www.pcmag.com/news/spacexs-starlink-adds-1-million-users-in-4-months>.

<sup>35</sup> See, e.g., sources cited in Seth Cooper, “Wi-Fi 7 Innovation is Now Deploying to Consumers,” *FSF Blog* (December 16, 2024), at: <https://freestatefoundation.blogspot.com/2024/12/wi-fi-7-innovation-is-now-deploying-to.html>.



#### IV. The Report Failed to Consider Intermodal Competition; a Broader View of the Broadband Market Is Needed

Although the 2024 report includes remarkable data points showing the market’s competitiveness, the Commission failed to fulfill its statutory duty of considering the effect of intermodal competition on the broadband market. The RAY BAUM’S Act directs “the Commission [to] consider all forms of competition, *including the effect of intermodal competition.*”<sup>36</sup> But nothing in the 2024 report shows that the Commission ever considered it.

The 2024 report includes no substantive analysis or new insights about how competition between mobile, fixed wireline, fixed wireless, and fixed satellite impacts services, prices, or other aspects of the market. Instead, the 2024 report largely repeats lines from the 2022 and 2020 reports that fixed and mobile broadband services are “either complementary or independent of each other” because many households subscribe to both services and that advances in 5G network speeds and reliability “could alter the relationship between fixed and mobile broadband services.”<sup>37</sup>

The 2024 report does cite an estimate that “17% of all households with paid Internet subscriptions relied on mobile broadband as their only means of access” as well as a similar estimate that 14% of households are mobile-only when fixed satellite Internet services are included.<sup>38</sup> Those estimates appear to show that a segment of the population regards mobile services as a substitute for fixed services, and they support an inference that an even larger segment would consider mobile and fixed services as potential substitutes that exert competitive pressures on each other. Cross-platform rivalry presumably has pro-competitive effects, putting downward pressure on prices because a provider using one technology would not want a subscriber to switch to a rival using a different technology or switch to a lower-tier service and rely more heavily on a rival’s service. However, the 2024 report never connects those estimates or any other data to likely or potential cross-platform competitive effects on the pricing or other service practices of market competitors.

Measuring the market-disciplining effect of such rivalry may be a complex undertaking that yields complex answers, but the 2024 report provides no indication that the Commission ever attempted it. As Free State Foundation scholars have pointed out in prior public comments and *Perspectives from FSF Scholars* papers, prior *Communications Marketplace Reports* also lacked substance on intermodal competition for broadband services.<sup>39</sup> Unfortunately, the 2024 report

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<sup>36</sup> 47 U.S.C. § 163(d)(1)(emphasis added).

<sup>37</sup> 2024 report, at ¶¶ 143, 148, 152.

<sup>38</sup> *Id.* at ¶¶ 144-145.

<sup>39</sup> See, e.g., Randolph J. May, Seth L. Cooper, and Andrew Long, “The FCC’s Marketplace Report Substantiates the Extent of Competition,” *Perspectives from FSF Scholars*, Vol. 16, No. 4 (January 25, 2021), at 7-11 (critiquing lack of substantive analysis of intermodal competition in the 2020 report), at: <https://freestatefoundation.org/wp-content/uploads/2021/02/The-Communications-Marketplace-Report-Highlights-Intramodal—but-Understates-Intermodal—Competition-012521.pdf>; Seth L. Cooper, “FCC Report Indicates a Competitive Communications Marketplace: Future Reports Should Make Cross-Platform Substitution Findings,” *Perspectives from FSF Scholars*, Vol. 14, No. 6 (February 26, 2019), at 6-10 (critiquing lack of substantive analysis of intermodal competition in the 2018 report), at: <https://freestatefoundation.org/wp-content/uploads/2019/10/FCC-Report-Indicates-a-Competitive-Communications-Marketplace-Future-Reports-Should-Make-Cross-Platform-Substitution-Findings-022619.pdf>.

made no advancement in considering the effect of intermodal competition over the 2022, 2020, and 2018 reports.

The report’s failure to show any serious consideration of the effect of intermodal competition is exemplified by its exclusion of 100/20 Mbps-capable satellite broadband services offered to nearly 100% of the population.<sup>40</sup> The Commission excluded satellite providers on the claimed basis of low subscription numbers and limited network capacity. But subscriptions are on the rise and satellite network capacity has been increased by the deployment of new satellites.

Notably, two members of the Commission recognized the 2024 report’s shortcomings on intermodal competition. In a dissenting statement, Commissioner Brendan Carr wrote that “instead of providing an accurate assessment of the converged market for communications services, the Commission continues to use a decades-old approach that looks at each broadband technology—including mobile, fixed, and satellite—as services that compete only in distinct and separate silos. That is not at all a reflection of the dynamics at play in the real world today.”<sup>41</sup> Also, Commissioner Nathan Simington wrote in a brief dissent that “[i]t is time for the Commission to modernize its understanding of the communications marketplace along several axes.”<sup>42</sup>

Indeed, the Commission adopted its 3G-era “mobile telephony/broadband services” market definition in the 2008 Verizon/ALLTEL Order. Despite monumental advancements in 5G speed and bandwidth capabilities compared to earlier generations of mobile technology, the agency continues to treat those services as entirely separate and distinct from fixed wireline broadband services. Given the widespread and continuing deployment of gigabit-speed fiber, 5G mobile and fixed networks, next-generation satellite networks, as well as other advancements such as Wi-Fi 6 and 7 connectivity, traditional product market definitions such as the “mobile telephony/broadband services” or the “wireline broadband Internet access services” are overly narrow and effectively preclude substantive consideration of cross-platform competitive effects.

Today, it is likely that there is an overall broadband Internet services product market that encompasses fixed and mobile services using different platform technologies. This year, the Commission – under new leadership – should initiate a proceeding to develop an updated understanding and competitive outlook toward the broader communications service landscape. The agency should have a more up-to-date analytical framework firmly established before it commences a proceeding for a future iteration of the *Communications Marketplace Report*.

## V. Conclusion

Data cited throughout the FCC’s 2024 *Communications Marketplace Report* shows that the broadband market was vibrant, as more Americans than ever before had access to competing next-generation fiber, 5G fixed and mobile, and satellite services that are continuously upgrading their capabilities. However, 2024 the report repeats past agency mistakes by failing to take

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<sup>40</sup> Communications Marketplace Report, GN Docket No. 24-119, 2024 Communications Marketplace Report (“2024 report”)(released December 31, 2024), at ¶ 316, available at: <https://www.fcc.gov/document/fcc-releases-2024-communications-marketplace-report>.

<sup>41</sup> 2024 report, at 315.

<sup>42</sup> 2024 report, at 316.

seriously the effects of competition between those different services. Under new leadership, the FCC should take a refreshed look at the market and recognize that there is a broader broadband market characterized by competition between fixed and mobile broadband services. An updated and broadened outlook that includes intermodal competitive effects should guide the Commission's preparation of future reports and policy actions.

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### **Further Readings**

Seth L. Cooper, "[The FCC's Ignoring Broadband Competition](#)," *Perspectives from FSF Scholars*, Vol. 19, No. 7 (February 22, 2024).

Seth L. Cooper, "[The 2022 Communications Marketplace Report: Timely FCC Action Could Accelerate Next-Gen Broadband Deployment](#)," *Perspectives from FSF Scholars*, Vol. 18, No. 2 (January 19, 2023).

Seth L. Cooper and Andrew K. Magloughlin, "[The Broadband Internet Services Market in January 2022: 5G, Cable, Fixed Wireless, Wi-Fi 6, and Fiber Are Benefitting Consumers](#)," *Perspectives from FSF Scholars*, Vol. 17, No. 5 (January 21, 2022).

Randolph J. May, Seth L. Cooper, and Andrew Long, "[The FCC's Marketplace Report Substantiates the Extent of Competition](#)," *Perspectives from FSF Scholars*, Vol. 16, No. 4 (January 25, 2021).

Seth L. Cooper, "[The Communications Market at 2020: The Competitiveness of Video, Mobile, and Fixed Broadband](#)," *Perspectives from FSF Scholars*, Vol. 15, No. 6 (January 30, 2020).

Seth L. Cooper, "[FCC Report Indicates a Competitive Communications Marketplace: Future Reports Should Make Cross-Platform Substitution Findings](#)," *Perspectives from FSF Scholars*, Vol. 14, No. 6 (February 26, 2019).