Broadband in America Report: Fiber Focus

Fiber Technology Deep Dive

March 2026 Edition | By: CostQuest Associates®

SECTION 1: INTRODUCTION

Fiber Market Focus 2026

Broadband in the United States is changing faster than ever and understanding these market shifts are essential for strategic decision-making. **The Broadband in America Report** series delivers nationwide insights into broadband coverage, cost, competition, and funding across all network technologies, published semiannually with data updates each spring and fall. Complementary regular reports offer deeper analysis of emerging technologies and trends shaping the telecommunications ecosystem.

This month's edition explores the latest trends in fiber broadband coverage across the United States, focusing on fiber coverage, economics, competition, and its evolving role within the broader broadband market landscape.

The data primarily referenced in this report are:

- FCC's Broadband Data Collection (BDC) Service Availability Data
- CostQuest's® Location Fabric of Broadband Serviceable Locations (BSLs)
- CostQuest's Network Cost Model data

BDC Version	Fabric Data Vintage	FCC Coverage Available
Version 1	June 30, 2022	November 23, 2022
Version 2	December 31, 2022	October 10, 2023
Version 3	June 30, 2023	November 14, 2023
Version 4	December 31, 2023	May 21, 2024
Version 5	June 30, 2024	November 11, 2024
Version 6	December 31, 2024	May 20, 2025
Version 7	June 30, 2025	December 2, 2025

All maps and data points reference fiber-to-the-premises (FTTP) technologies. Service definitions follow the FCC standard, which requires download speeds of at least 100 Mbps and upload speeds of at least 20 Mbps.

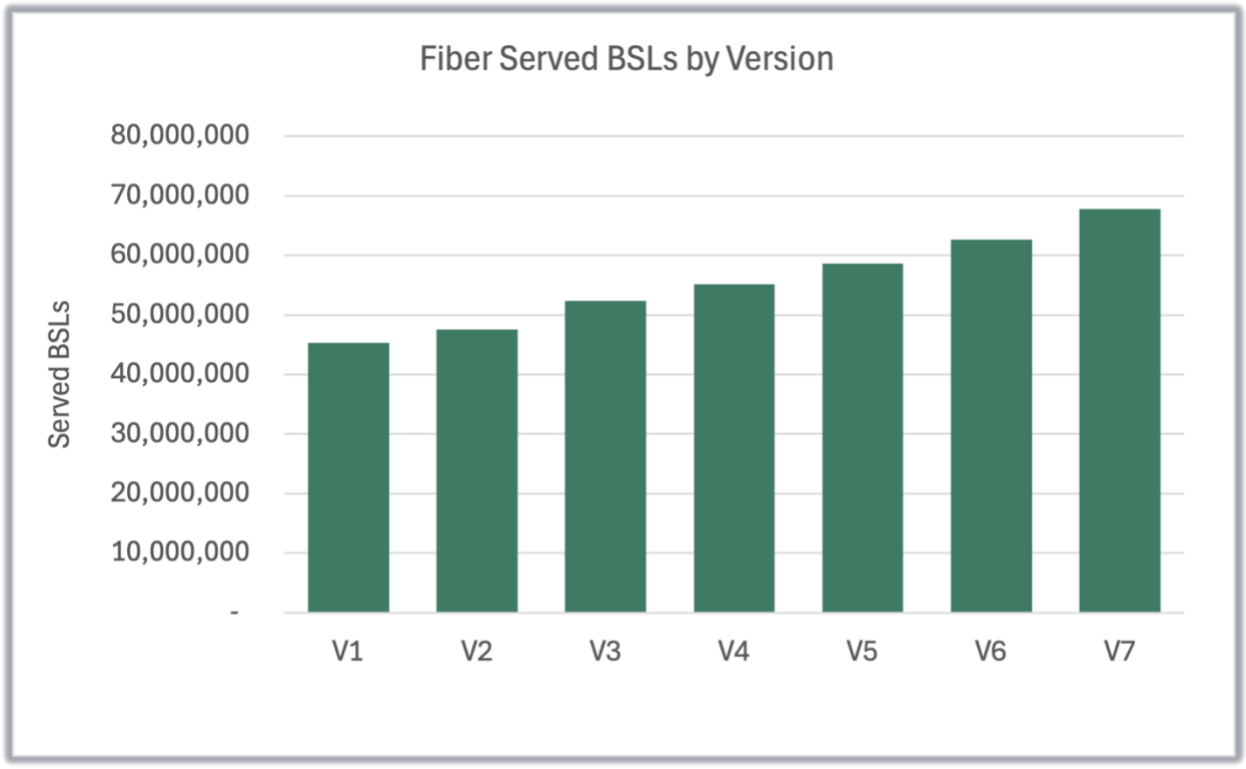
Setting the stage: Why fiber's moment is now

Fiber now serves more than 58% of all *passed* BSLs in the United States. This level of coverage represents a structural shift, not a cyclical blip, in how Americans connect to the internet. For ISPs, investors, policymakers and municipalities, understanding where fiber is growing, who is driving it, and what federal funding is accelerating it is no longer optional: it is a competitive and strategic imperative.

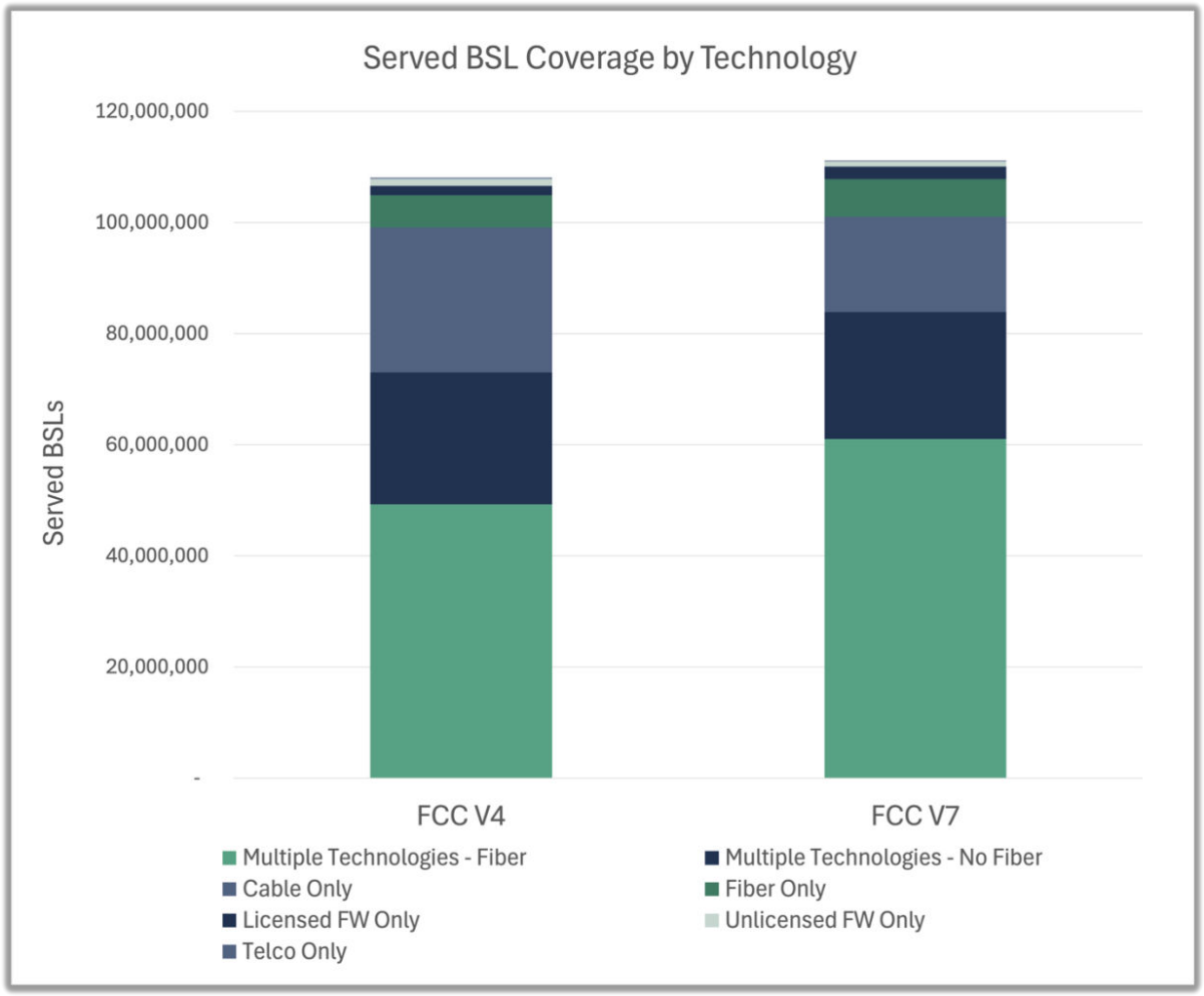
Section 2: Current Market Landscape

Fiber's rise: The forces reshaping America's broadband landscape

Fiber broadband in the United States has experienced a 49.6% growth in fiber-served locations since Version 1 of the Fabric, with an 8.3% increase in just the past six months alone. As of FCC BDC Version 7, there are **1,561 active fiber providers** operating across the country, including **42 new entrants** and **71 providers** that **doubled their existing footprint**.

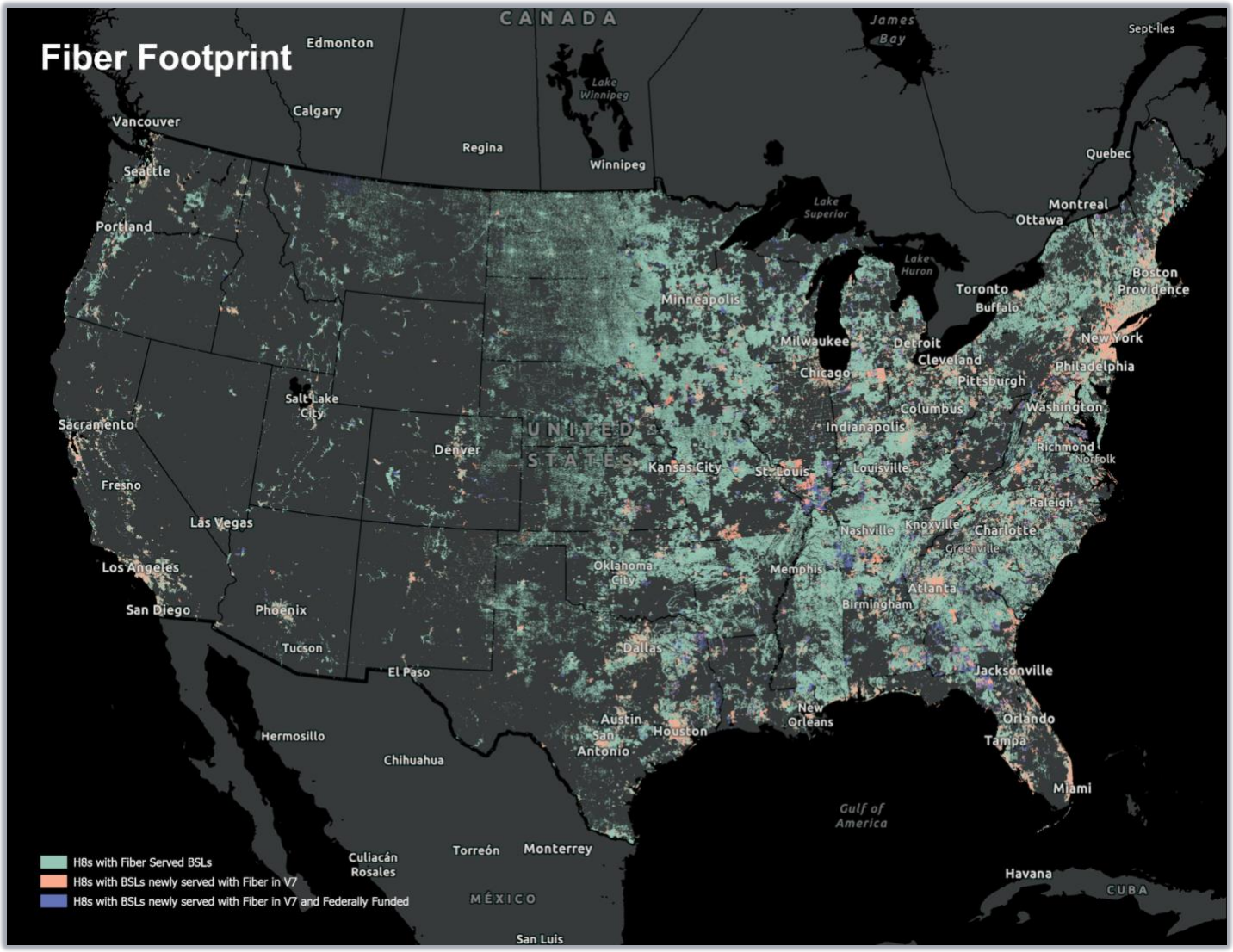


With Version 4 of the Fabric, fiber covered approximately 50% of served locations. In the roughly 18 months since, **fiber coverage grew by another 10 percentage points**, a rate of growth that outpaced all other broadband technologies combined to **cover 60% of all *served* locations.**



Three primary forces are driving fiber expansion:

1. Continued build-out by incumbent local exchange carriers (ILECs) upgrading from legacy copper infrastructure
2. Cable companies deploying FTTP alongside or in place of traditional DOCSIS/coaxial systems
3. Maturation of federal funding programs pushing fiber into previously unserved and underserved areas.



The map above, aggregated to H3 8 cells, shows fiber served BSLs across the U.S., newly fiber served BSLs, and newly fiber served and federally funded BSLs from FCC BDC and Location Fabric Version 6 to Version 7.

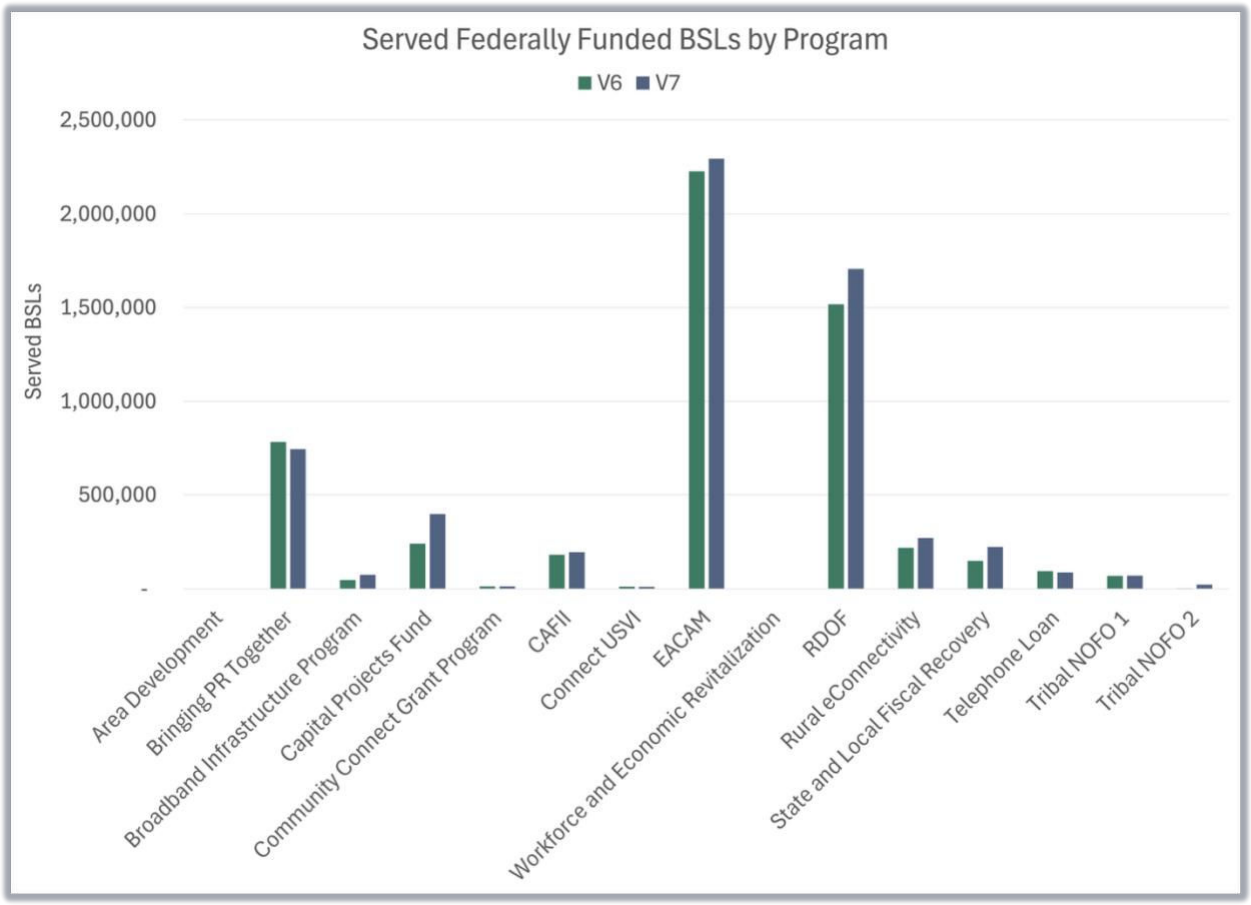
Federal funding as a deployment engine

Federal funding programs have become a meaningful accelerant of fiber deployment, particularly in rural America.

Key programs driving federally funded fiber deployment include:

- **EACAM (Enhanced ACAM):** The largest federally funded fiber program by covered locations, updated in 2025, supports 2.3 million locations on fiber.

- **RDOF (Rural Digital Opportunity Fund):** Covering locations from Auction 904 (2020), supports 1.7 million locations on fiber.
- **CAFII:** Covering locations from Auction 903 (2018), supports 194 thousand locations on fiber.
- **Tribal Broadband Connectivity Program (NOFO 2):** Saw dramatic growth, jumping from 2,281 fiber-served BSLs in December 2024 to 22,571 by June 2025.
- **Tribal Broadband Connectivity and other programs combined:** Support 1.7 million locations on fiber.

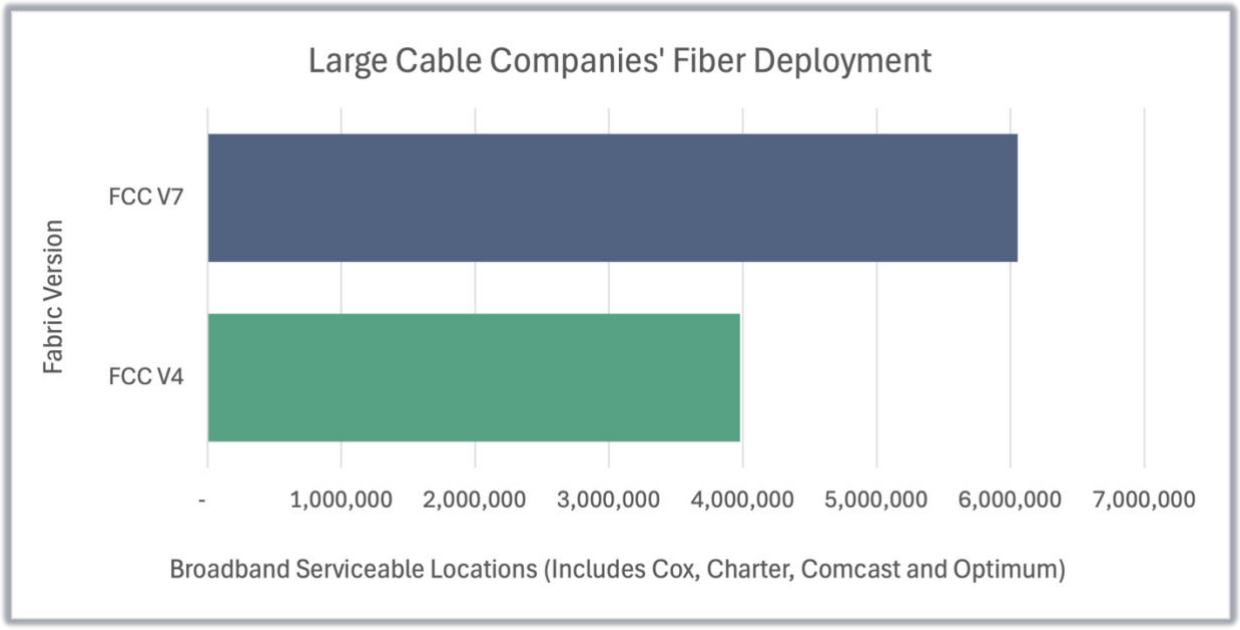


Important note: The data does not account for BEAD (Broadband Equity, Access, and Deployment) program locations, which will evolve significantly over the next several years as states begin disbursing funds.

Competitive dynamics: Cable, ILECs & new entrants

AT&T remains the dominant fiber provider by a significant margin, serving 15.5% of all fiber BSLs nationwide. Cable companies, historically reliant on DOCSIS coaxial infrastructure, are

increasingly deploying FTTP. Four of the largest cable companies, Cox, Charter (Spectrum), Xfinity (Comcast) and Optimum, now collectively serve over 6 million locations with fiber, up from 3.9 million in 2023.



How smaller providers are making moves

While AT&T dominates by total footprint, some of the most dramatic percentage growth is coming from smaller and mid-sized providers, signaling competitive disruption and the impact of targeted funding:

Provider	V7 Fiber BSLs	V6 Fiber BSLs	Difference	% Growth
Steuben County Rural Electric Membership Corporation	60,742	7,972	52,770	662%
Rapid Fiber Internet LLC	21,395	2,833	18,562	655%
Valley Communications Association Inc	16,852	3,004	13,848	461%
ClearWave (Hargray)	1,237,344	305,807	931,537	305%
Open Infra Inc	87,195	24,253	62,942	260%
Service Electric Cable TV	16,082	4,546	11,536	254%
Loop Internet	22,261	6,585	15,676	238%

All Points Broadband	12,591	3,738	8,853	237%
Fatbeam	11,871	4,046	7,825	193%
Winn Telephone Company	17,823	6,676	11,147	167%

Only providers with more than 10,000 fiber served locations were included in analysis.

Notable standouts in provider growth include:

- ClearWave (Hargray): 304% increase, adding 938,465 additional BSLs
- Rural electric cooperatives (like Steuben County REMC) and community-focused providers (like Rapid Fiber Internet and Valley Communications)
    - Leveraging federal grants and cooperative structures to deploy fiber rapidly in markets that larger carriers historically avoided. This trend is expected to accelerate as BEAD funds are distributed.

SECTION 3: KEY TAKEAWAYS

The state of fiber and what comes next

1. Fiber Is now the dominant broadband technology and the gap will widen

Fiber has reached more than 60% of *served* locations nationwide. With BEAD funding still being deployed, federal programs such as EACAM and RDOF continuing to hit deployment milestones, and providers including ILECs and cable companies expanding their networks – among them AT&T, which recently announced a $250 billion infrastructure investment – that share is expected to grow. Providers still reliant primarily on legacy cable or DSL infrastructure face increasing competitive pressure. Investors and municipalities should prioritize fiber-ready planning frameworks now.

2. Rural fiber deployment is accelerating, driven by federal programs, but the window is closing

Federal funding is making real, measurable progress in rural America—and **29.5% overall of all rural fiber locations as of Version 7 are federally funded.** At the same time, the sheer volume of fiber deployment remains concentrated in urban and suburban markets, where private investment economics are more favorable.

3. Provider consolidation and rapid new entrant growth are reshaping the competitive map

The fiber provider landscape continues to evolve as existing providers expand their fiber footprint, new carriers enter the market, and through carrier consolidation. From the last

release of the fabric data, **71 providers doubled their footprint**, **42 new providers entered the market**, and **legacy players like Lightpath experienced 128% growth**.

While the impact of deployment is not yet available, **AT&T acquired Lumen's Quantum Fiber**, **Charter is in the process of acquiring Cox**, and **Astound recently announced that it will acquire Google Fiber.** The combination of competition, network evolution, and carrier consolidation will continue fiber's expansion.

As a result, the competitive map for fiber broadband in 2026 looks materially different than it did in 2023. Market intelligence, coverage analysis, and location-level data **(such as CostQuest's Fabric Location Intelligence)** are becoming essential competitive analysis tools, not just regulatory compliance instruments.