



2026 ANNUAL SURVEY HIGHLIGHTS

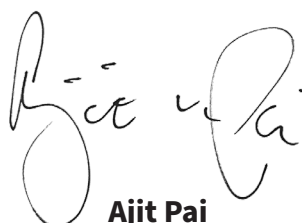




The 2026 Annual Survey tells the story of America's wireless industry racing to meet our AI moment. AI is moving into everyday life, and it is placing unprecedented new demands on our wireless networks. Last year alone, Americans used a record 159.3 trillion megabytes of wireless data, more than the entire 4G decade combined. We saw over 20% more traffic than last year and a nearly 60% spike over the past two years.

America's wireless providers are answering that call. Providers invested nearly \$30 billion just last year to build new sites, deploy small cells, and expand network capacity. Small cells, the dense infrastructure AI will depend on, have grown nearly 120% since 2018, laying the foundation for the AI-native 6G networks the country will need to keep pace with other nations.

America's wireless industry is powering the AI era, investing at record levels, and building the networks the country needs to win the future.



Ajit Pai
President & CEO



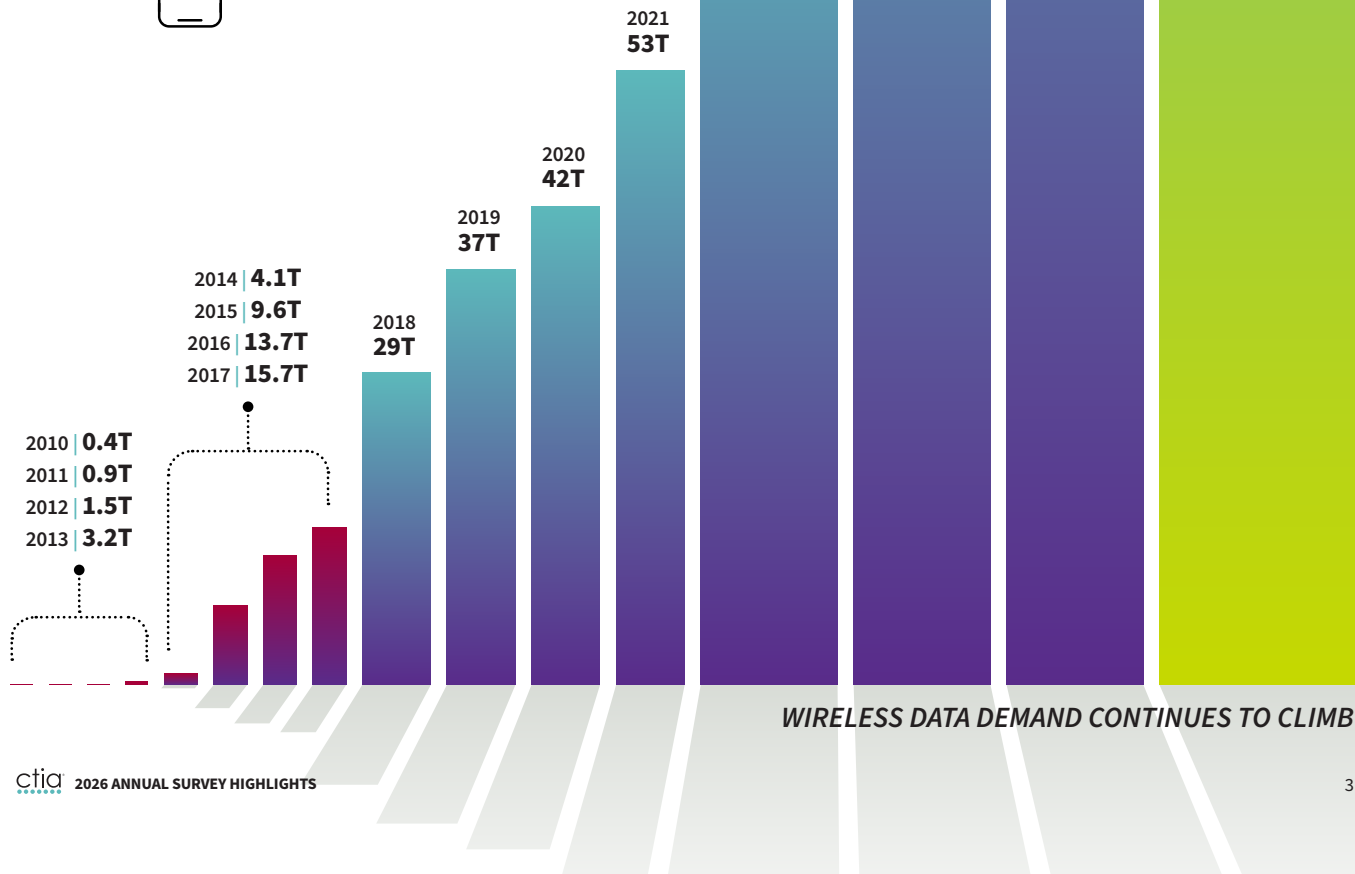
AI IS SUPERCHARGING WIRELESS DEMAND

Americans continue to demand more wireless data to power everything—from AI to wearables, digital streaming services, and more. Last year alone, Americans used a staggering 159.3 trillion megabytes of data—20% more data than was used the previous year and 39% more data than was used during the entire 4G decade.

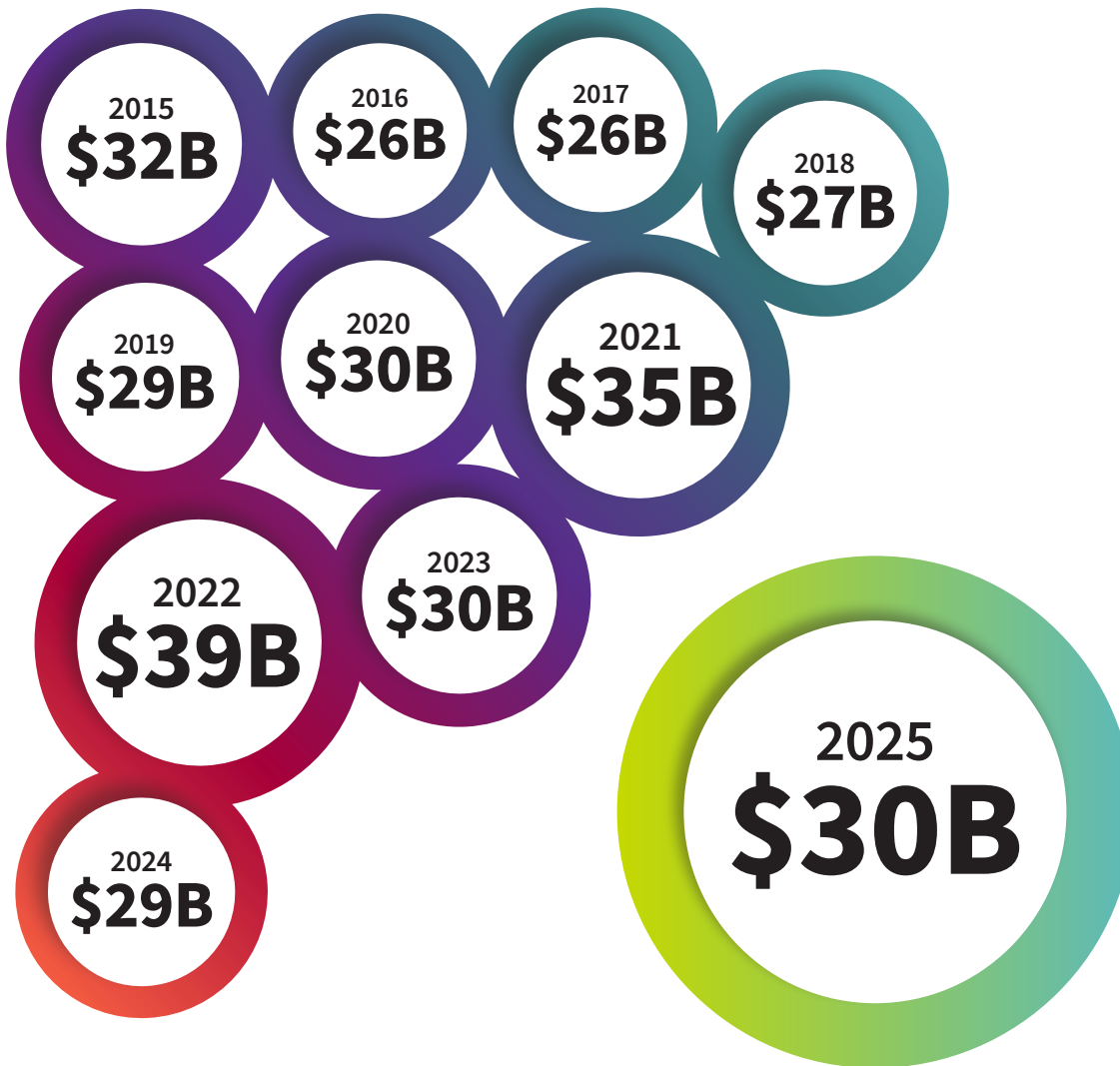
That growth reflects the increasingly central role wireless plays in everyday life, as data demand is expected to grow 4x by 2032. And the growth of AI will place an even greater strain on America's wireless networks. AI is growing 3x faster than traditional wireless traffic and is expected to make up nearly a third of all broadband traffic by 2034. This traffic will upend traditional patterns, requiring more licensed spectrum and continued investment to support AI innovation across industries.

20%

increase in data demand
year-over-year.



WIRELESS INVESTS BILLIONS EVERY YEAR



WIRELESS IS INVESTING TO BUILD OUR AI FUTURE

Wireless providers continue to invest tens of billions annually to support massive data growth. Last year, the industry spent nearly \$30 billion to build new sites, upgrade existing infrastructure, and expand new offerings like 5G Home, making wireless even more accessible, reliable, and affordable for all Americans.

Over the life of the industry, total wireless investment in our nation's infrastructure now exceeds \$763 billion. A third of that—\$250 billion—has been spent since 2018, the year 5G launched. In fact, since this launch, America's wireless providers have averaged more than \$31 billion a year in investment, which is helping meet surging demand while building the network capacity and capabilities needed for the next wave of innovation, from smart infrastructure to real-world autonomous systems.

\$250B
invested since the
year 5G launched.



AMERICANS INCREASINGLY RELY ON WIRELESS TO POWER THEIR LIVES

Wireless connectivity continues to become more deeply embedded in everyday life. The United States now supports nearly 603 million wireless connections—roughly 1.8 connections for every American.

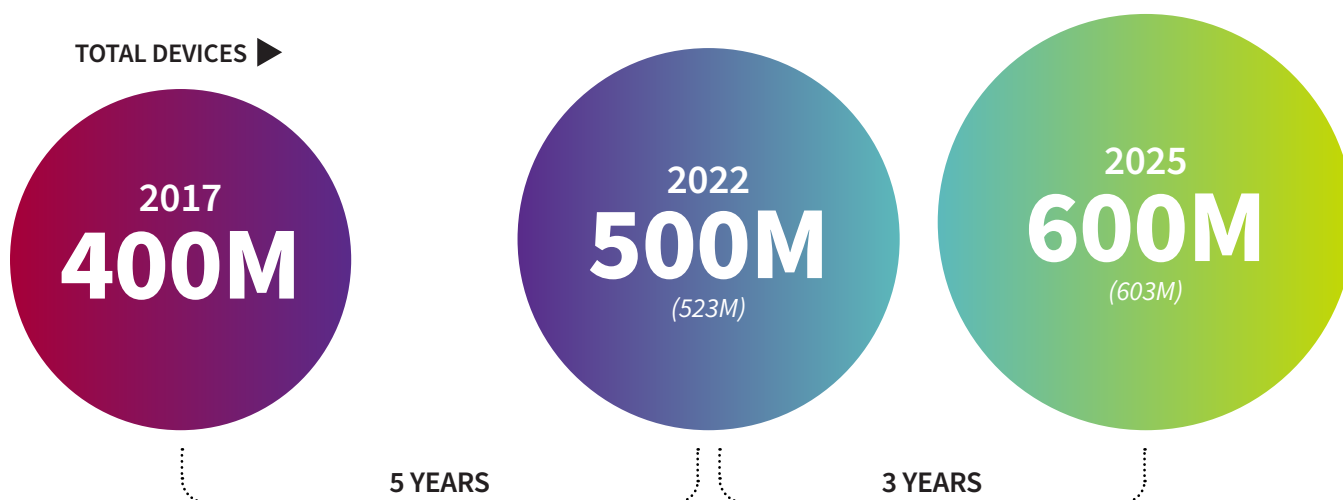
Remarkably, as households and enterprises embrace new wireless innovations, nearly half (46%) of all devices on networks today are something other than a phone. That includes the wearable devices Americans use to help monitor health and wellness, like smartwatches, glucose monitors, and more—and this continuous, real-time data helps to improve the management of chronic conditions and drive better outcomes. We also see critical infrastructure and other industries increasingly relying on connected sensors and other wireless devices to improve safety, efficiency, and performance.

All of this growth in non-phone devices is prologue to what is next with AI. As AI moves into the physical world through robotics, autonomous systems, and intelligent devices, the number of wireless connections will continue to grow dramatically.

2x
faster growth
for data-only
devices compared
to all wireless
connections.



WIRELESS CONNECTIONS OVER TIME



WIRELESS CONTINUES TO DELIVER MORE FOR LESS

This year's survey reinforces how competition is delivering more value to wireless customers while costing less. Real prices for typical unlimited wireless plans declined by more than 10% last year. The Consumer Price Index confirms these declines, showing nominal prices for wireless service down more than 4% last year, helping fight the inflation Americans feel at the gas pump and grocery store. Today, wireless accounts for only 1.7% of Americans' spending, a share that has fallen sharply—over 15%—since 2020.

At the same time, wireless is giving Americans more bang for their buck—as we reported last year, wireless speeds increased 51% and the price per gigabyte fell by more than 21%. This combination of affordability and innovation—thanks to robust competition and investment—has helped make wireless one of the greatest consumer success stories of the decade.

51%

increase in wireless speeds and 21% decrease in price per GB year-over-year.



GAS/UTILITIES
↑10.8%



CABLE TV
↑3.7%



RENT
↑2.9%



COLLEGE TUITION
↑1.5%



WIRELESS SERVICE
↓4.1%



CHANGE IN PRICE OF GOODS, 2024-2025

Source: BLS data

AMERICANS CONTINUE TO FLOCK TO 5G HOME BROADBAND

Millions of consumers are choosing 5G home broadband, taking advantage of the lower prices that increased competition from the wireless industry is bringing. For the fourth consecutive year, virtually all net growth in the home broadband market came from fixed wireless offerings.

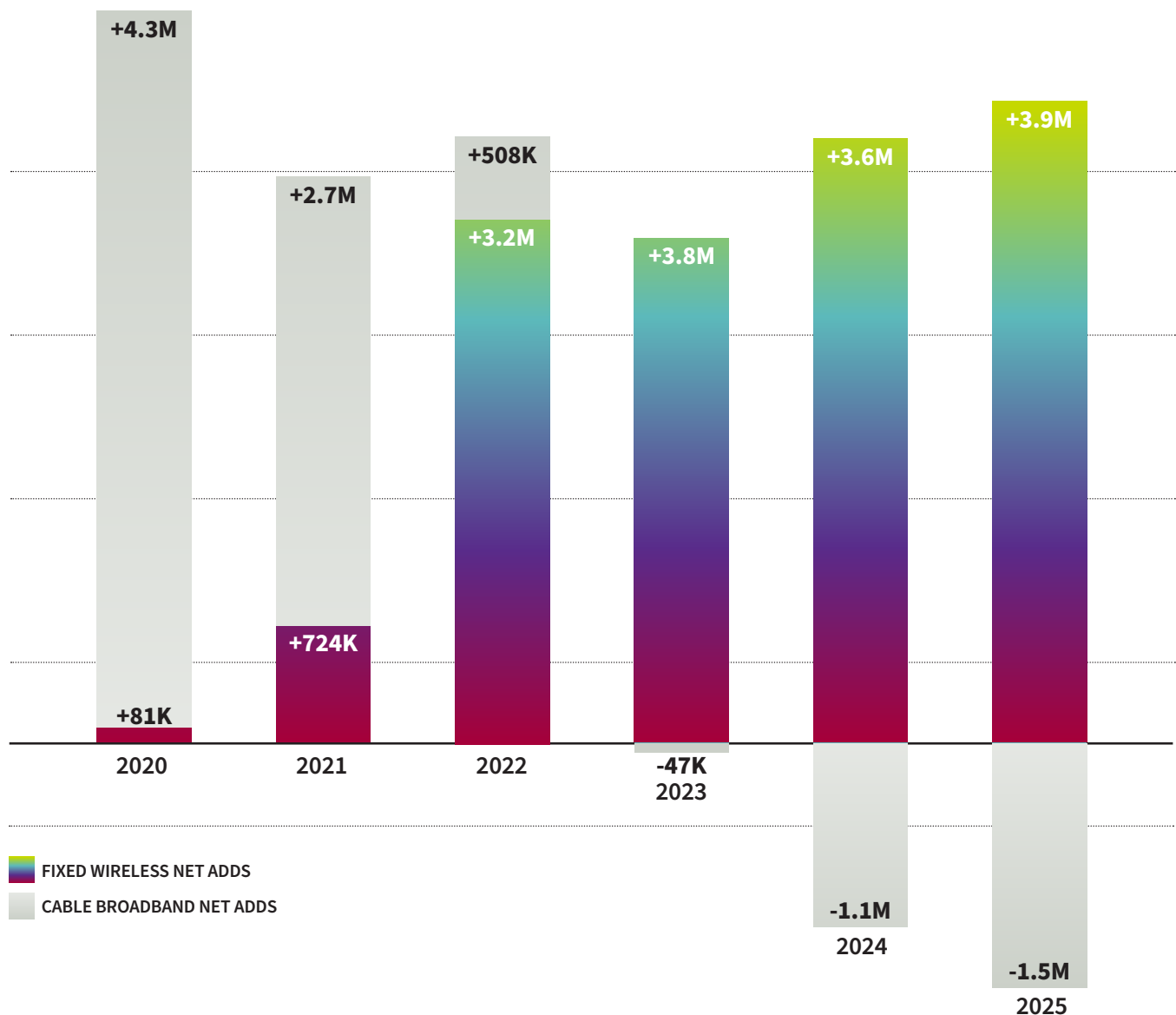
While the cable industry lost nearly 1.5 million wired broadband subscribers last year, fixed wireless gained over 3.9 million—more than double the number of subscribers cable lost. In fact, consumers are 8x more likely to recommend 5G Home than cable. Today, nearly 16 million Americans rely on 5G networks at home, helping increase competition, expand consumer choice, and connect previously underserved communities.

16M

Americans subscribe to 5G Home.



FWA GAINS WHILE CABLE LOSES SUBSCRIBERS



BUILDING THE INFRASTRUCTURE FOR AI-NATIVE 6G

Supporting unprecedented wireless demand requires continued network expansion, and small cells are playing a critical role in the deployment of America's wireless networks. Today, small cells make up nearly 40% of all wireless cell sites nationwide. Small cells have grown nearly 120% since 2018, helping to support expanded 5G deployment, increased capacity, and improved network performance across the country.

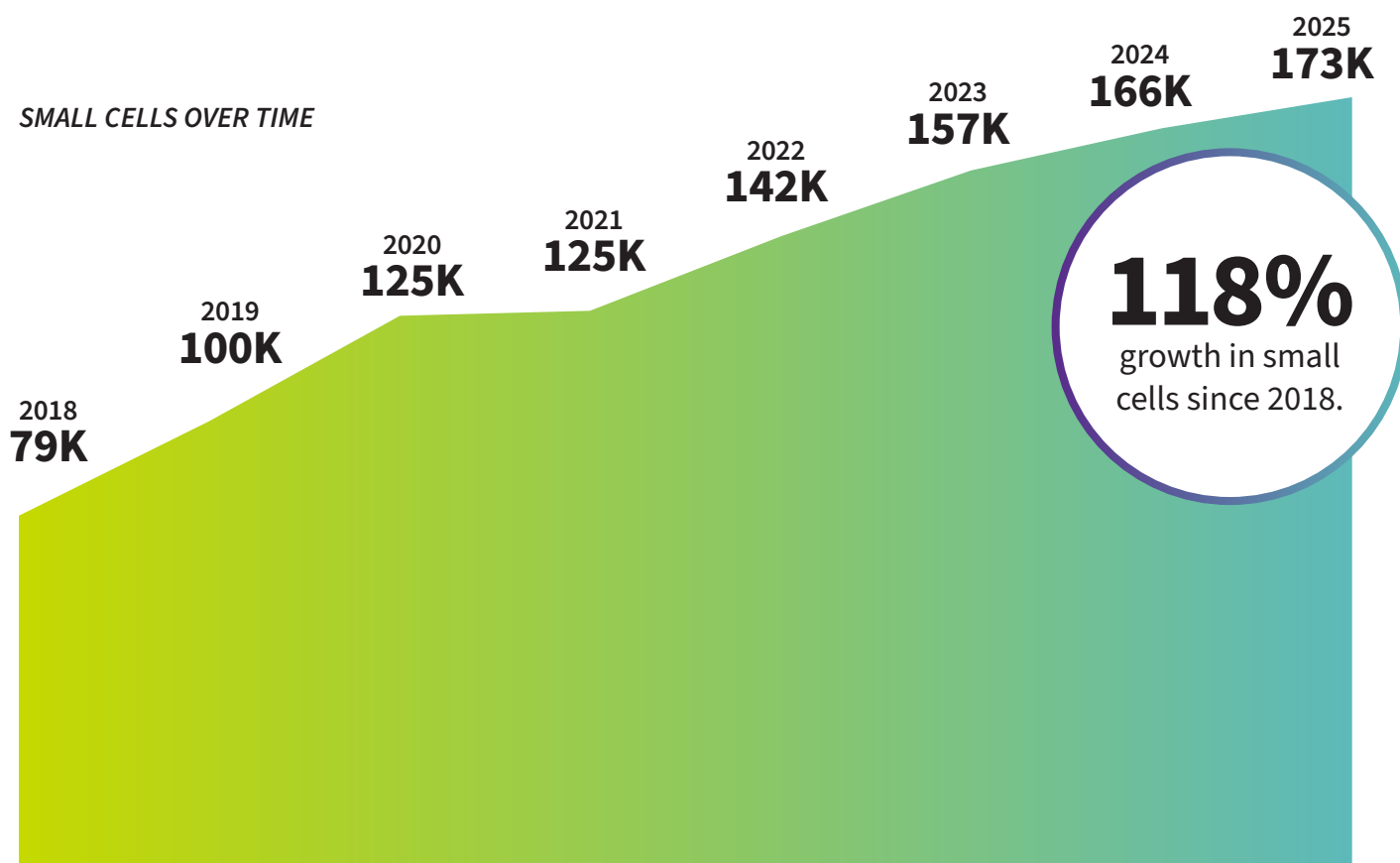
This buildout is also laying the physical groundwork for the next generation of innovation. Every new small cell adds the infrastructure that AI-native 6G networks will require to sense, coordinate, and respond in real time, turning today's infrastructure investment into tomorrow's AI platform.

442K

cell sites supported wireless connectivity in 2025.



SMALL CELLS OVER TIME



A FORWARD-LOOKING APPROACH TO ENSURING OUR WIRELESS FUTURE

The wireless industry's ability to support ever more data demand and offer lower prices—while providing a platform that drives innovation and moves our economy forward—reflects years of vision and sustained investment in building the world's best wireless networks.

The opportunities and challenges ahead are even greater. AI and wireless are now inseparable, each depending on the other to move data, coordinate real-time decisions, and operate in the physical world. Supporting the network traffic AI will demand requires a steady pipeline of licensed, mid-band spectrum and continued infrastructure investment.

Fortunately, we are not in this effort alone. Policymakers are acting decisively to provide the industry with the inputs to deliver for our nation's future. We are lucky to have leaders who understand that wireless connectivity, and its convergence with AI, are central to economic growth, global competitiveness, and America's leadership in the technologies that will define the next decade.



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