



IMPACT OF STARLINK

On Fiber Broadband Providers

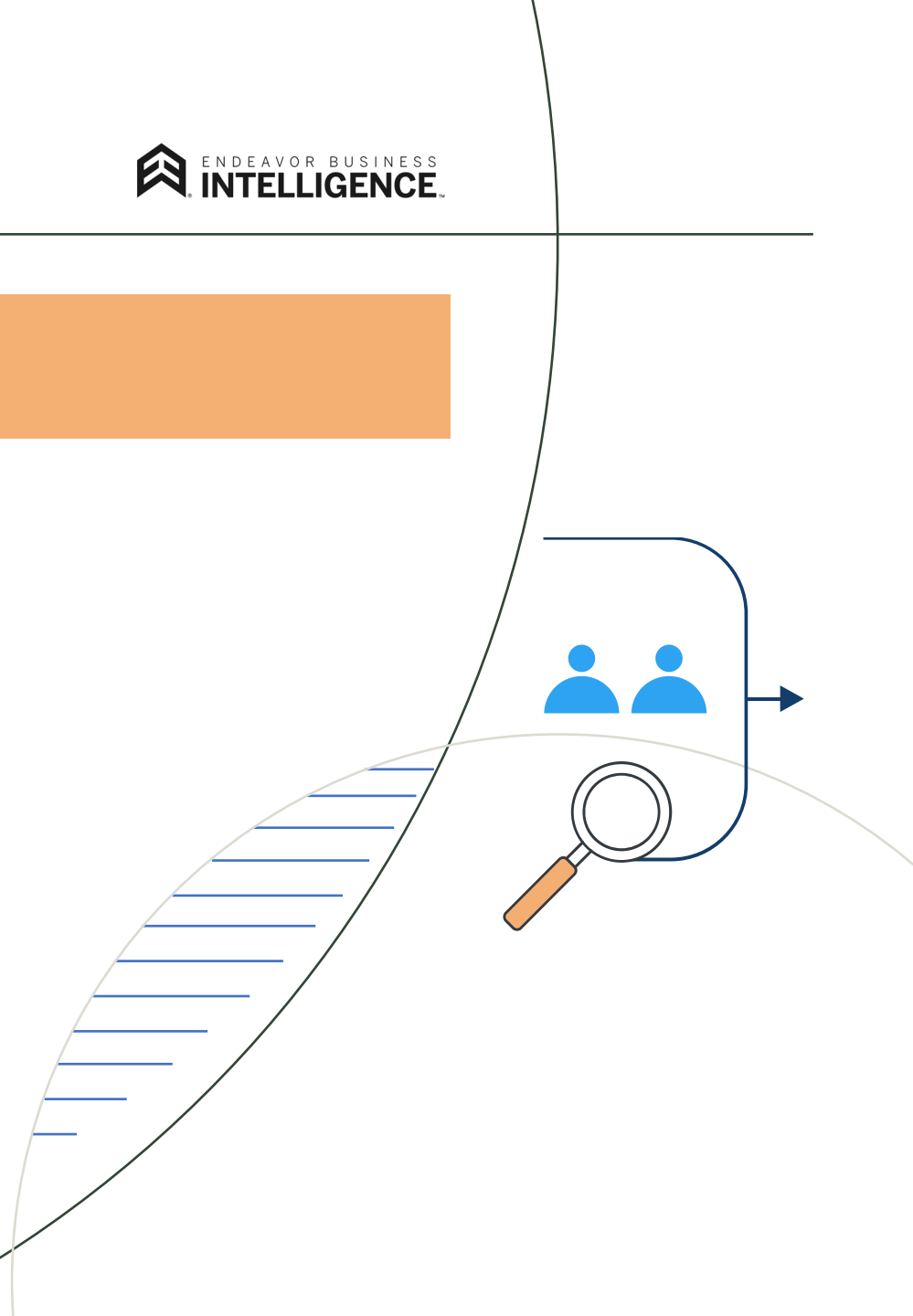
PULSE SURVEY
April 2025



METHODOLOGY

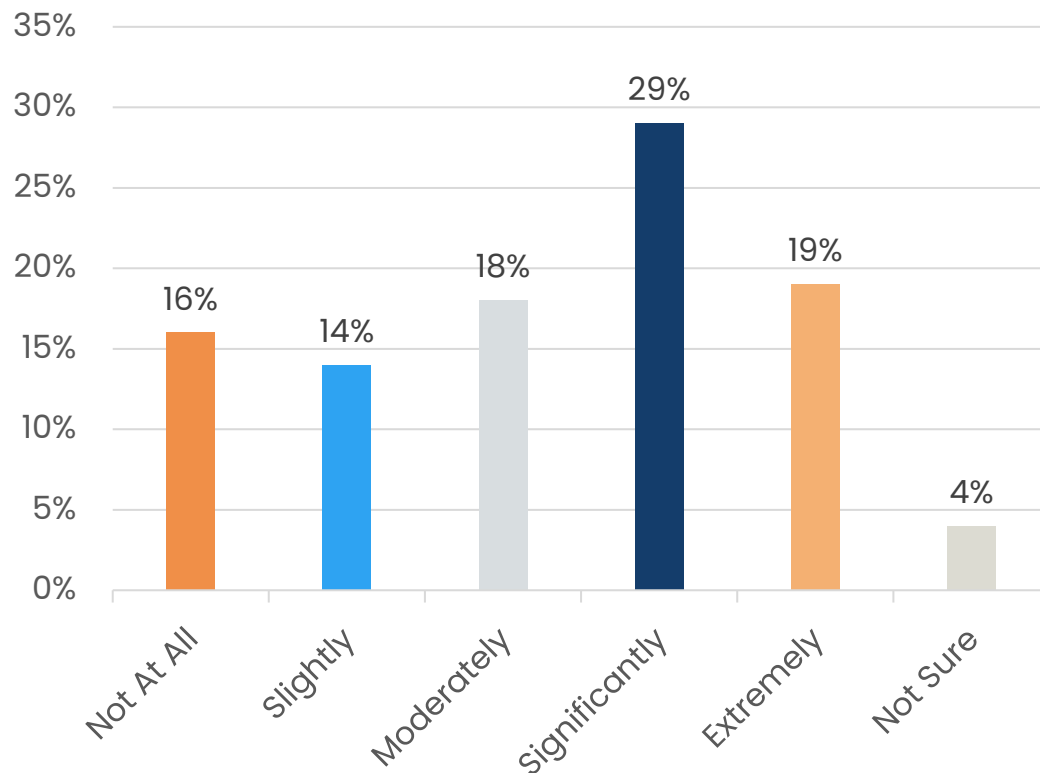
This survey was designed to assess industry perspectives on the growing influence of satellite broadband, particularly Starlink, and its impact on fiber broadband providers. Our objective was to capture a focused snapshot of perceived challenges, competitive pressures, funding implications, and strategic differentiation opportunities across the broadband ecosystem.

The survey ran for two weeks in April 2025 and received 106 completed responses from broadband professionals in the *Lightwave + BTR* and *ISE* audiences. Results were analyzed to identify trends in market dynamics, infrastructure investment, and provider response strategies.



INDUSTRY OUTLOOK

To what extent do you feel the removal of restrictions around when satellite service such as Starlink is an option will create barriers for fiber broadband providers looking to expand into new markets, particularly in rural or hard-to-reach areas?

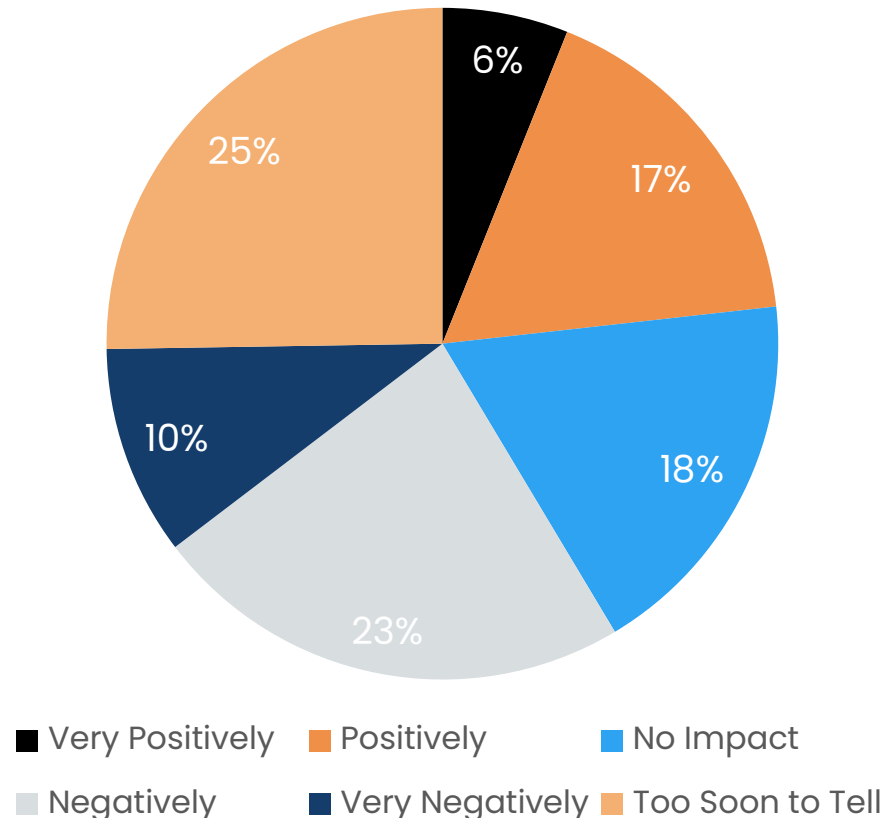


Starlink Seen as Barrier to Fiber Expansion

Survey results show that nearly half of respondents believe the removal of restrictions on when satellite services like Starlink can be used will create significant or extreme barriers to fiber broadband expansion in rural or hard-to-reach markets. An additional 18% see a moderate barrier, while just 30% feel the impact will be slight or nonexistent. Only 4% were unsure. These findings suggest growing concern that the increased availability and rapid deployment of satellite broadband could hinder fiber providers' efforts to expand into underserved areas.

BEAD FUNDING & FINANCIAL OUTLOOK

How do you expect the ongoing shift in BEAD funding to impact the financial viability of your involvement in broadband expansion?



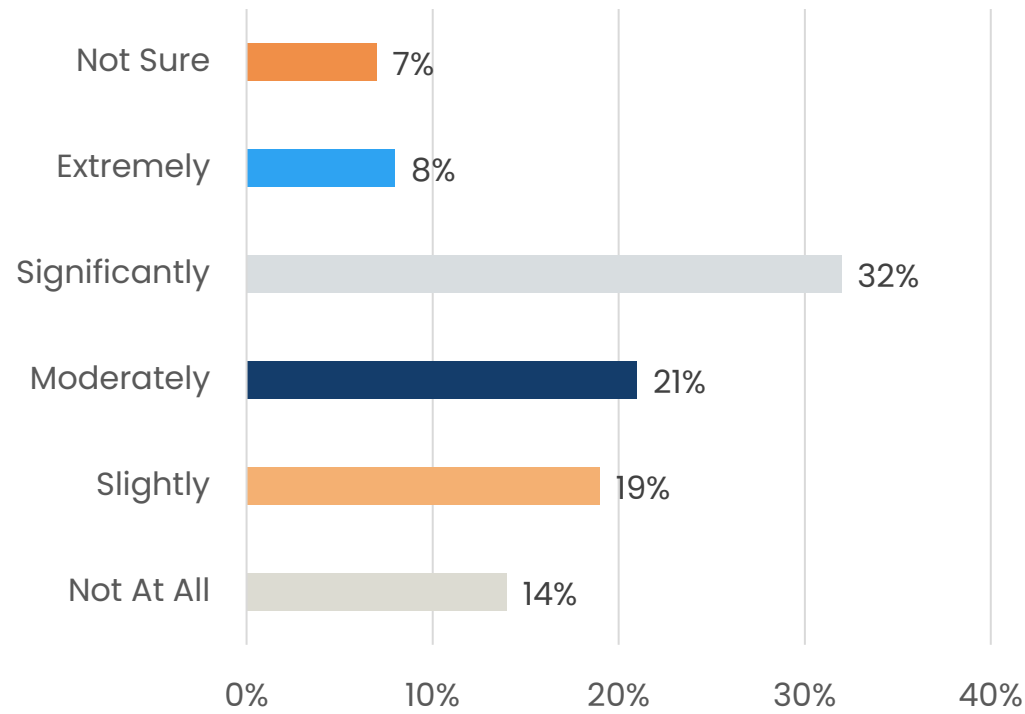
Uncertainty Surrounds BEAD's Financial Impact

A quarter of respondents say it's too soon to tell how shifts in BEAD funding will impact their financial viability in broadband expansion. Meanwhile, 33% expect a negative or very negative impact, compared to just 23% who anticipate a positive effect. Another 18% expect no impact at all.

These responses highlight mixed outlooks and significant uncertainty surrounding BEAD's evolving role in broadband investment.

INFRASTRUCTURE INVESTMENT PRESSURE

To what extent, if at all, do you feel Starlink's rapid rollout and scalability will pressure fiber broadband providers to accelerate infrastructure investments, especially in regions where fiber deployment has been slow or difficult?



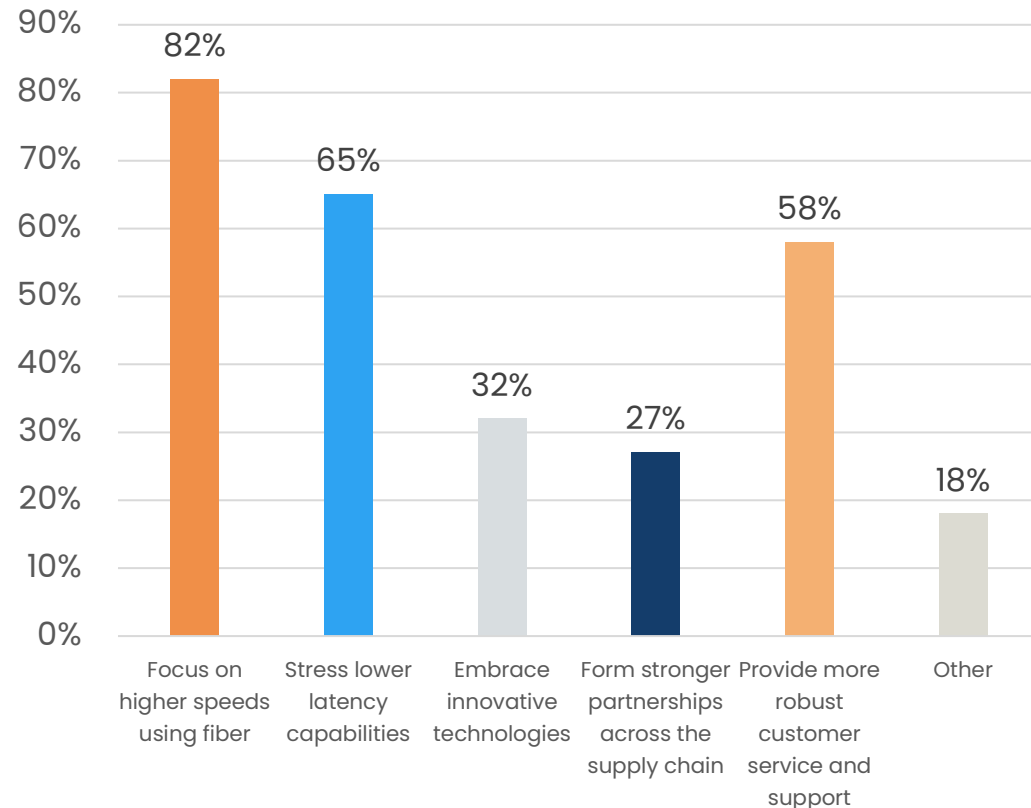
4 in 10 See Starlink Driving Faster Fiber Builds

A combined 40% of respondents believe Starlink's rapid rollout and scalability will significantly or extremely pressure fiber broadband providers to accelerate infrastructure investments, particularly in harder-to-reach regions. Another 21% see a moderate level of pressure, while 33% feel the impact will be slight or nonexistent.

These findings suggest that many in the industry view satellite broadband as a competitive force influencing fiber deployment timelines.

DIFFERENTIATION STRATEGIES

Which of the following strategies do you believe will be most effective for fiber broadband providers to differentiate themselves in regions where Starlink is available? (Select all that apply)

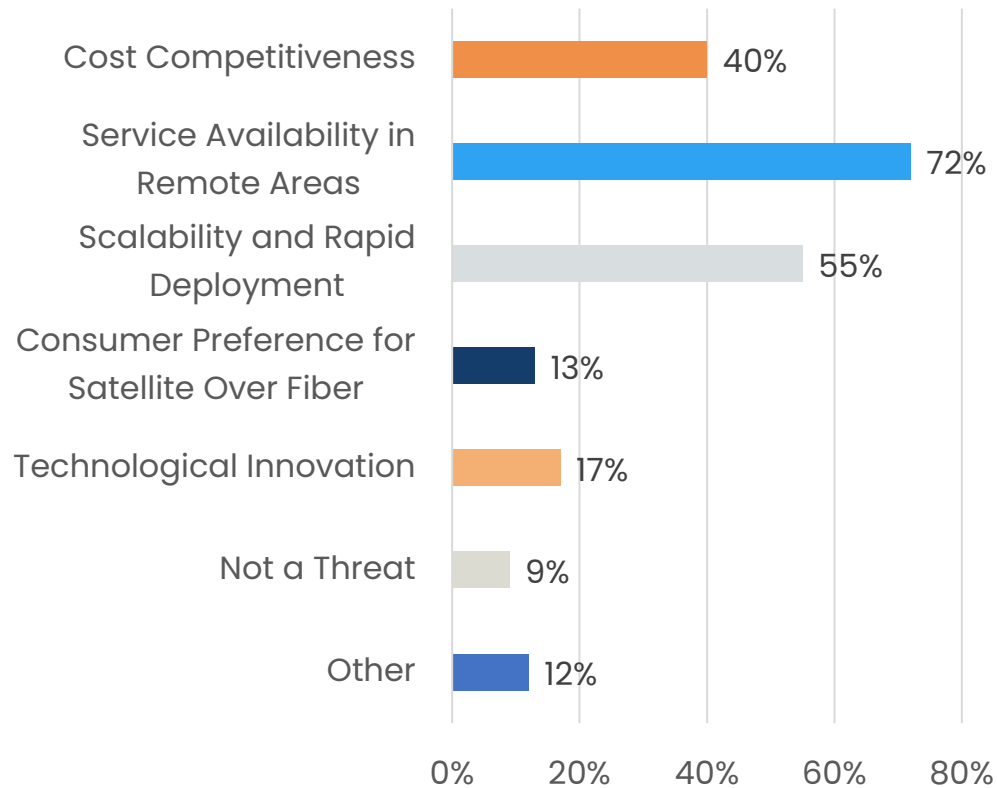


Speed, Latency, and Service Lead Fiber's Competitive Edge

When asked how fiber broadband providers can best differentiate themselves in areas where Starlink is available, the top strategies cited were focusing on higher speeds (82%), stressing lower latency (65%), and offering stronger customer service (58%). Fewer respondents pointed to innovation (32%) or supply chain partnerships (27%) as key differentiators. These results suggest that core performance and service quality remain the strongest tools in fiber's competitive toolkit.

TOP PERCEIVED THREATS FROM STARLINK

What do you perceive as the biggest threat Starlink poses to fiber broadband providers?
(Select all that apply)



Availability and Speed Seen as Starlink's Biggest Advantages

The greatest perceived threat from Starlink to fiber providers is its service availability in remote areas (72%), followed by scalability and rapid deployment (55%), and cost competitiveness (40%). Fewer respondents pointed to technological innovation (17%) or consumer preference (13%) as major concerns, and just 9% said Starlink poses no threat at all. These findings indicate that Starlink's accessibility and rollout speed are top competitive pressures facing fiber providers.



SUMMARY OF INSIGHTS

The survey highlights growing concern among broadband professionals about the competitive pressure posed by satellite services like Starlink. Many see its rapid deployment and wide availability, especially in rural markets, as a meaningful threat to fiber broadband expansion efforts.

While opinions are divided on the impact of shifting BEAD funding, there's a strong sense of uncertainty and caution around future investment viability. In response to these market shifts, fiber providers are leaning into their core strengths – superior speed, lower latency, and better customer service – to maintain a competitive edge.

Overall, the industry recognizes Starlink as a fast-moving disruptor that is forcing fiber providers to rethink expansion strategies, accelerate deployments, and sharpen their value propositions.