

# Industry Analyst sees new growth potential for AT&T, T-Mobile, Verizon

*Industry Analyst Jeff Kagan believes the U.S. telecom industry may be on the verge of a renewed growth cycle*

ATLANTA, GA, UNITED STATES, February 7, 2026 /EINPresswire.com/ -- The telecom marketplace has evolved dramatically over the past several decades, experiencing multiple waves of growth and disruption. Following a powerful expansion driven by the iPhone, Android, and mobile data, the industry has faced significant challenges over the past decade. Now, Kagan says conditions may be shifting once again, this time for the better.

"It seems both AT&T and Verizon are beginning to show renewed promise," said Kagan. "In my opinion, this is the first time in quite a few years that real growth potential is emerging. T-Mobile has also staged a strong recovery over the past decade."

Looking ahead, Kagan poses a key question: "Are we entering another long-term growth wave—or not?"

If a new growth cycle does materialize, Kagan believes it will look very different from past expansions. Future momentum is likely to come from new products, services, and business models, including [wireless broadband](#), artificial intelligence, and emerging technologies. Increased consolidation and acquisitions may also play a role.

"I believe these new directions represent the right path forward for the U.S. telecom marketplace," Kagan said.

Kagan notes that he regularly speaks with senior executives across the industry, many of whom are optimistic about the future. "They paint a picture of tomorrow in bright colors," he said. "If even part of that vision becomes reality, we could be about to witness a re-boot of the U.S. telecom industry."

With more than four decades as an [industry analyst](#) and columnist, Kagan has met with



Industry Analyst



Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry."

*Dick Martin former EVP of  
AT&T Public Relations*

countless CEOs and senior leaders. "Each company has its own strengths and weaknesses," he said. "About a decade ago, the entire sector was struggling to find a way forward. Today, things feel different... somewhat better."

While there are no guarantees, Kagan believes the emergence of new technologies and fresh leadership may be the difference this time. "There is a renewed focus and energy at these companies," he said. "That desire to succeed has always existed, but today it appears to be

aligned with the right strategic priorities."

The broader competitive landscape has also shifted. Traditional telephone and cable TV businesses continue to struggle as both enterprise and consumer customers move in new directions. At the same time, wireless, broadband and now AI remains central to future growth.

Today's industry leaders Verizon, T-Mobile, and AT&T face growing competition not only from each other, but also from cable operators with wireless and broadband offerings. These are companies like Xfinity Mobile, Spectrum Mobile, Altice or Optimum, as well as technology giants including Google, Microsoft, and emerging AI-focused companies.

"New competitors, new technologies, and new marketing approaches will continue to reshape this industry," Kagan said. "The question is what leadership in this sector will look like five or ten years from now."

Kagan remains cautiously optimistic. "I have a strong feeling these leaders may begin to show a level of growth and innovation we haven't seen in years," he said. "At the same time, new players could rise into the top ranks."

He adds, "Over time, all these companies have experienced winning streaks and losing streaks. Sometimes they are happy with their results. Other times, not so much. The big question I am asking today is simple. What will happen next?"

#### About Jeff Kagan

Jeff Kagan is an Atlanta-based Industry Analyst, Columnist, Consultant, Influencer, and Keynote Speaker. For more than 40 years, he has provided analysis and commentary on innovation, market trends, and company performance across wireless, telecom, 5G, 6G, AI, and other high-growth sectors, serving both B2B and B2C markets.

Former AT&T Executive Vice President of Public Relations Dick Martin highlighted Kagan's influence in his book *Tough Calls: AT&T and the Hard Lessons Learned from the Telecom Wars*,

writing:

“Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry.”

Kagan has written thousands of columns and articles translating complex technology trends into clear, practical insights for executives, investors, customers, and employees.

For additional coverage: Search “Jeff Kagan” on Google News and Google All.

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