



# LRG

Leichtman Research Group

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## **OVER 8.5 MILLION ADDED BROADBAND FROM TOP CABLE AND TELEPHONE COMPANIES IN 2007**

*61.9 Million Get Broadband from Top Cable and Telephone Companies*

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**Durham, NH – March 3, 2008** – Leichtman Research Group, Inc. (LRG) found that the nineteen largest cable and telephone providers in the US – representing about 94% of the market – acquired over 8.5 million net additional high-speed Internet subscribers in 2007. Annual net broadband additions were down compared to the record 10.4 million in 2006, and 9.9 million in 2005, and were the fewest since 2003.

The top broadband providers now account for over 61.9 million subscribers – with cable companies having 33.5 million broadband subscribers, and telephone companies having over 28.4 million subscribers.

Other key findings include:

- The top telephone providers added 4.4 million broadband subscribers in 2007 – compared to 5.65 million in 2006, and 5.4 million in 2005
- Cable operators added a 4.1 million broadband subscribers in 2007 – compared to 4.8 million in 2006, and 4.5 million in 2005
- The top telephone providers netted 52% of the broadband additions in 2007
- In the fourth quarter of 2007, cable and telephone providers added over 1.75 million broadband subscribers – with telephone companies adding over 900,000 subscribers and cable companies adding about 850,000 subscribers in the quarter.

“Net broadband additions in the US peaked in 2006, yet there were still over 8.5 million new broadband subscribers added in 2007,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “The broadband market is clearly maturing, but the broadband subscriber base will continue to grow for many more years.”

<b>Broadband Internet</b>	<b>Subscribers at end of 4Q 2007</b>	<b>Net Adds in 2007</b>
<b><i>Cable Companies</i></b>		
Comcast	13,220,000	1,678,000
Time Warner	7,620,000	976,000
Cox*	3,725,000	376,000
Charter	2,682,500	289,100
Cablevision	2,282,000	243,000
Insight**	754,660	143,460
Mediacom	658,000	80,000
Cable One	341,034	52,024
RCN*	284,000	25,000
Other major private cable companies***	1,900,000	255,000
<b>Total Top Cable</b>	<b>33,467,194</b>	<b>4,117,584</b>
<b><i>Telephone Companies</i></b>		
AT&T	14,156,000	1,991,000
Verizon	8,235,000	1,253,000
Qwest	2,611,000	473,000
Embarq	1,277,000	260,000
Windstream	871,400	189,000
CenturyTel	555,000	135,000
Citizens^	523,845	76,345
Cincinnati Bell	221,500	23,200
<b>Total Top Telephone Companies</b>	<b>28,450,745</b>	<b>4,400,545</b>
<b>Total Broadband</b>	<b>61,917,939</b>	<b>8,518,129</b>

Sources: The Companies and Leichtman Research Group, Inc.

\* LRG estimate

\*\* Insight's total includes 369,000 subscribers that in 2008 are with Comcast as part of a partnership split

\*\*\* Includes LRG estimates for Bright House Networks and Suddenlink

^ Citizens includes acquisition of Global Valley

Totals reflect pro forma results from system sales and acquisitions

Top cable and telephone companies represent approximately 94% of all subscribers

Company subscriber counts may not represent solely residential households

### **About Leichtman Research Group, Inc.**

Leichtman Research Group, Inc. (LRG) specializes in research and analysis on broadband, media and entertainment industries. LRG combines on-going surveys and analysis with years of hands-on industry experience to provide companies with a richer understanding of the potential impact and adoption of new products and services. For more information about LRG, please call (603) 397-5400 or visit [www.LeichtmanResearch.com](http://www.LeichtmanResearch.com).

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