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Leichtman Research Group

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3 MILLION ADDED BROADBAND FROM TOP PROVIDERS IN 2014

Net Broadband Adds were Greater than a Year Ago

Durham, NH – March 5, 2015 – Leichtman Research Group, Inc. (LRG) found that the seventeen largest cable and telephone providers in the US – representing about 94% of the market – acquired 3 million net additional high-speed Internet subscribers in 2014. Annual net broadband additions in 2014 were 114% of the total in 2013.

These top broadband providers now account for 87.3 million subscribers – with cable companies having 51.9 million broadband subscribers, and telephone companies having 35.4 million subscribers.

Other key findings include:

- The top cable companies netted 89% of the broadband additions in 2014 – compared to 82% of the broadband additions in 2013
- The top cable companies added 2.65 million broadband subscribers in 2014 – 123% of the total net additions for the top cable companies in 2013
- The top telephone companies added about 345,000 subscribers – 72% of the total net additions for the top telephone companies in 2013
- AT&T U-verse and Verizon FiOS broadband subscribers now account for 53% of Telco broadband subscribers – up from 37% at the end of 2012
- The top cable companies had 2.3 million more net additions than phone companies in 2014 – compared to 1.7 million more net adds in 2013

“At the end of 2014, the top cable and Telco broadband providers in the US cumulatively had over 87.3 million subscribers, adding 3 million subscribers in the past year,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “While about four of every five US households now get broadband at home, there were more broadband net additions in 2014 than in 2013. This was the first year-over-year increase in broadband net adds since 2006 over 2005.”

Broadband Internet	Subscribers at end of 2014	Net Adds in 2014
Cable Companies		
Comcast	21,962,000	1,277,000
Time Warner	12,253,000	657,000
Charter	5,072,000	432,000
Cablevision	2,760,000	(20,000)
Suddenlink	1,149,100	78,800
Mediacom	1,013,000	48,000
WOW (WideOpenWest)	727,800	19,600
Cable ONE	488,454	15,823
Other major private cable companies*	6,535,000	150,000
Total Top Cable	51,960,354	2,658,223
Telephone Companies		
AT&T^	16,028,000	1,000
Verizon	9,205,000	190,000
CenturyLink	6,082,000	91,000
Frontier^	2,342,500	108,500
Windstream	1,131,600	(39,300)
FairPoint	321,624	(8,142)
Cincinnati Bell	269,900	1,500
Total Top Phone	35,380,624	344,558
Total Top Providers	87,340,978	3,002,781

Sources: The Companies and Leichtman Research Group, Inc.

* Includes LRG estimates for Cox and Bright House Networks

^ LRG estimates of pro forma results from system sale, does not include wireless subs

Company subscriber counts may not represent solely residential households

Totals reflect pro forma results from system sales and acquisitions

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

About Leichtman Research Group, Inc.

Leichtman Research Group, Inc. (LRG) specializes in research and analysis on the broadband, media and entertainment industries. LRG combines ongoing consumer research studies with industry tracking and analysis, to provide companies with a richer understanding of current market conditions, and the adoption and impact of new products and services. For more information about LRG, please call (603) 397-5400 or visit www.LeichtmanResearch.com.

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