



# LRG

Leichtman Research Group

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## **5.4 MILLION ADDED BROADBAND FROM TOP CABLE AND TELEPHONE COMPANIES IN 2008**

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

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**Durham, NH – March 6, 2009** – Leichtman Research Group, Inc. (LRG) found that the twenty largest cable and telephone providers in the US – representing about 94% of the market – acquired over 5.4 million net additional high-speed Internet subscribers in 2008. Annual net broadband additions were down compared to the 8.5 million in 2007, and the peak of 10.4 million in 2006, and were the fewest in the seven years that LRG has tracked the broadband industry.

The top broadband providers now account for nearly 67.7 million subscribers – with cable companies having 36.9 million broadband subscribers, and telephone companies having 30.7 million subscribers.

Other key findings include:

- Total net broadband additions in 2008 were 63% of the total in 2007
- The top cable companies added 3.2 million broadband subscribers in 2008 – 77% of the total net additions for the top cable companies in 2007
- The top telephone providers added 2.2 million broadband subscribers in 2008 – 50% of the total net additions for the top telephone companies in 2007
- The top cable companies netted 59% of the broadband additions in 2008
- In the fourth quarter of 2008, cable and telephone providers added over 1 million broadband subscribers – with telephone companies adding about 570,000 subscribers and cable companies adding about 460,000 subscribers in the quarter

“The total number of broadband subscribers in the US doubled in the past four years, growing to nearly 68 million at the end of 2008,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “With increased market penetration,

growth inevitably had to slow, but there was still room for 5.4 million more broadband subscribers in 2008.”

<b>Broadband Internet</b>	<b>Subscribers at end of 4Q 2008</b>	<b>Net Adds in 2008</b>
<b><i>Cable Companies</i></b>		
Comcast	14,929,000	1,336,000
Time Warner	8,727,000	847,000
Cox*	4,000,000	275,000
Charter	2,881,100	198,800
Cablevision	2,455,000	173,000
Mediacom	737,000	79,000
Insight	458,500	72,500
Cable ONE	372,887	31,853
RCN	302,000	17,000
Other major private cable companies**	2,075,000	175,000
<b>Total Top Cable</b>	<b>36,937,487</b>	<b>3,205,153</b>
<b><i>Telephone Companies</i></b>		
AT&T	15,077,000	921,000
Verizon	8,673,000	660,000
Qwest	2,847,000	236,000
Embarq	1,412,000	135,000
Windstream	978,800	107,400
CenturyTel	641,000	86,000
Frontier	579,943	57,098
FairPoint	295,360	4,783
Cincinnati Bell	233,200	11,700
<b>Total Top Telephone Companies</b>	<b>30,737,303</b>	<b>2,218,981</b>
<b>Total Broadband</b>	<b>67,674,790</b>	<b>5,424,134</b>

Sources: The Companies and Leichtman Research Group, Inc.

\* LRG estimate

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

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 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.LleichtmanResearch.com](http://www.LleichtmanResearch.com).

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