



# LRG

Leichtman Research Group

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## **3 MILLION ADDED BROADBAND FROM TOP CABLE AND TELEPHONE COMPANIES IN 2011**

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

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**Durham, NH – March 16, 2012** – Leichtman Research Group, Inc. (LRG) found that the eighteen largest cable and telephone providers in the US – representing about 93% of the market – acquired 3 million net additional high-speed Internet subscribers in 2011. Annual net broadband additions in 2011 were 88% of the total in 2010.

The top broadband providers now account for 78.6 million subscribers – with cable companies having over 44.3 million broadband subscribers, and telephone companies having over 34.3 million subscribers.

Other key findings include:

- The top cable companies netted 75% of the broadband additions in 2011
- The top cable companies added 2.3 million broadband subscribers in 2011 – 98% of the total net additions for the top cable companies in 2010
- The top telephone providers added 750,000 broadband subs in 2011 – 68% of the total net additions for the top telephone companies in 2010
- In the fourth quarter of 2011, cable and telephone providers added 765,000 broadband subscribers – with cable companies accounting for 82% of the broadband additions in the quarter

“Despite a high level of broadband penetration in the US, the top broadband providers added 88% as many subscribers in 2011 as in 2010,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “At the end of 2011, the top broadband providers in the US cumulatively had over 78.6 million subscribers, an increase of nearly 25 million over the past five years.”

<b>Broadband Internet</b>	<b>Subscribers at end of 4Q 2011</b>	<b>Net Adds in 2011</b>
<b>Cable Companies</b>		
Comcast	18,147,000	1,159,000
Time Warner <sup>^</sup>	10,344,000	491,000
Cox <sup>*</sup>	4,500,000	130,000
Charter	3,654,600	252,900
Cablevision	2,965,000	73,000
Suddenlink	951,400	65,100
Mediacom	851,000	13,000
Insight <sup>^</sup>	550,000	25,500
Cable ONE	451,082	25,680
Other major private cable companies <sup>**</sup>	1,925,000	55,000
<b>Total Top Cable</b>	<b>44,339,082</b>	<b>2,290,180</b>
<b>Telephone Companies</b>		
AT&T	16,427,000	117,000
Verizon	8,670,000	278,000
CenturyLink	5,554,000	238,000
Frontier <sup>^</sup>	1,735,000	37,833
Windstream	1,355,300	53,600
FairPoint	314,135	24,390
Cincinnati Bell	257,300	1,200
<b>Total Top Telephone Companies</b>	<b>34,312,735</b>	<b>750,023</b>
<b>Total Broadband</b>	<b>78,651,817</b>	<b>3,040,203</b>

Sources: The Companies and Leichtman Research Group, Inc.

<sup>\*</sup> LRG estimate

<sup>\*\*</sup> Includes LRG estimates for Bright House Networks and RCN

<sup>^</sup> Totals prior to Time Warner Cable's acquisition of Insight completed on 2/29/2012

<sup>^^</sup> LRG estimate, does not include wireless subscribers

Totals reflect pro forma results from system sales and acquisitions

Top cable and telephone companies represent approximately 93% 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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