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Leichtman Research Group

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2.6 MILLION ADDED BROADBAND FROM TOP CABLE AND TELEPHONE COMPANIES IN 2013

84.3 Million Get Broadband from Top Cable and Telephone Companies

Durham, NH – March 17, 2014 – Leichtman Research Group, Inc. (LRG) found that the seventeen largest cable and telephone providers in the US – representing about 93% of the market – acquired over 2.6 million net additional high-speed Internet subscribers in 2013. Annual net broadband additions in 2013 were 95% of the total in 2012.

These top broadband providers now account for 84.3 million subscribers – with cable companies having 49.3 million broadband subscribers, and telephone companies having 35.0 million subscribers.

Other key findings include:

- The top cable companies netted 82% of the broadband additions in 2013 – compared to 88% of the broadband additions in 2012
- The top cable companies added nearly 2.2 million broadband subscribers in 2013 – 89% of the total net additions for the top cable companies in 2012
- Comcast added about 1.3 million broadband subscribers in 2013 – accounting for 49% of the total net additions for the top providers in the year
- The top telephone providers added 480,000 broadband subscribers in 2013 – 146% of the total net additions for the top telephone companies in 2012
- AT&T and Verizon added 3.3 million fiber subscribers (via U-verse and FiOS) in 2013, while having a net loss of 3.05 million DSL subscribers. U-verse and FiOS broadband subscribers now account for 47% of Telco broadband subscribers – up from 29% at the end of 2011

“At the end of 2013, the top broadband providers in the US cumulatively had over 84.3 million subscribers, adding 2.6 million subscribers in the past year,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “With top Telco providers focused on upgrading customers from DSL to fiber broadband services, cable providers accounted for over 80% of the net broadband adds in 2013.”

Broadband Internet	Subscribers at end of 2013	Net Adds in 2013
Cable Companies		
Comcast	20,662,000	1,296,000
Time Warner	11,606,000	211,000
Charter	4,640,000	371,000
Cablevision	2,780,000	17,000
Suddenlink	1,059,500	57,400
Mediacom	965,000	50,000
WOW (WideOpenWest)*	740,000	31,000
Cable ONE	472,631	13,396
Other major private cable companies**	6,385,000	115,000
Total Top Cable	49,310,131	2,161,796
Telephone Companies		
AT&T	16,425,000	35,000
Verizon	9,015,000	220,000
CenturyLink	5,991,000	140,000
Frontier^	1,836,000	112,000
Windstream	1,170,900	(43,600)
FairPoint	329,766	4,789
Cincinnati Bell	268,400	9,000
Total Top Telephone Companies	35,036,066	477,189
Total Broadband	84,346,197	2,638,985

Sources: The Companies and Leichtman Research Group, Inc.

* WOW was added as one of the top cable broadband providers this year, replacing RCN

** Includes LRG estimates for Cox, and Bright House Networks

^ LRG estimate, does not include wireless subscribers

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 93% 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.LeichtmanResearch.com.

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