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Leichtman Research Group

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2.7 MILLION ADDED BROADBAND FROM TOP CABLE AND TELEPHONE COMPANIES IN 2012

81.4 Million Get Broadband from Top Cable and Telephone Companies

Durham, NH – March 19, 2013 – 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 2.7 million net additional high-speed Internet subscribers in 2012. Annual net broadband additions in 2012 were 90% of the total in 2011.

These top broadband providers now account for 81.4 million subscribers – with cable companies having nearly 46.8 million broadband subscribers, and telephone companies having 34.6 million subscribers.

Other key findings include:

- The top cable companies netted 88% of the broadband additions in 2012
- The top cable companies added 2.4 million broadband subscribers in 2012 – 105% of the total net additions for the top cable companies in 2011
- Comcast added over 1.2 million broadband subscribers in 2012 -- accounting for 45% of the total net additions for the top providers in the year
- The top telephone providers added 320,000 broadband subscribers in 2012 – 43% of the total net additions for the top telephone companies in 2011
- AT&T and Verizon added 3.08 million fiber subscribers (via U-verse and FiOS) in 2012, while having a net loss of 3 million DSL subscribers

“At the end of 2012, the top broadband providers in the US cumulatively had nearly 81.4 million subscribers, an increase of about 19 million over the past five years,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “Even with the high level of broadband penetration in the US, the top broadband providers added 90% as many subscribers in 2012 as in 2011”

Broadband Internet Provider	Subscribers at end of 2012	Net Adds in 2012
Cable Companies		
Comcast	19,367,000	1,223,000
Time Warner	11,395,000	486,000
Cox*	4,620,000	120,000
Charter	3,978,000	323,000
Cablevision	3,055,000	90,000
Suddenlink	1,002,100	53,400
Mediacom	915,000	64,000
Cable ONE	459,235	8,153
Other major private cable companies**	1,978,000	53,000
Total Top Cable	46,769,335	2,420,553
Telephone Companies		
AT&T	16,390,000	(37,000)
Verizon	8,795,000	125,000
CenturyLink^	5,848,000	192,000
Frontier^	1,757,000	22,000
Windstream^^	1,214,500	6,700
FairPoint	326,367	12,232
Cincinnati Bell	259,400	2,100
Total Top Telephone Companies	34,590,267	323,032
Total Broadband	81,359,602	2,743,585

Sources: The Companies and Leichtman Research Group, Inc.

* LRG estimate

** Includes LRG estimates for Bright House Networks and RCN

^ LRG estimate, does not include wireless subscribers

^^ Windstream no longer reports the number of non-residential 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.

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