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Leichtman Research Group

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1.6 MILLION ADD BROADBAND IN THE FIRST QUARTER OF 2009

69.3 Million Get Broadband from Top Cable and Telephone Companies

Durham, NH – May 13, 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 1.6 million net additional high-speed Internet subscribers in the first quarter of 2009. These top broadband providers now account for nearly 69.3 million subscribers – with cable companies having 37.7 million broadband subscribers, and telephone companies having about 31.5 million subscribers.

Other broadband findings for the quarter include:

- The top cable companies added over 835,000 subscribers, representing 52% of the net broadband additions for the quarter versus the top telephone companies
- Overall, broadband additions in 1Q 2009 amounted to 73% of those in 1Q 2008 – with cable having 70% as many additions as a year ago, and Telcos 77%
- The top cable broadband providers have a 55% share of the overall market, with a 6.2 million subscriber advantage over the top telephone companies

“Net broadband additions in 1Q 2009 were about 600,000 more than in 4Q 2008, and the most since the first quarter of 2008,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “Yet, given the traditional seasonality of the broadband industry, it should not be a surprise if net adds in 2Q 2009 are half of what they were in 1Q 2009.”

Broadband Internet	Subscribers at end of 1Q 2009	Net Adds in 1Q 2009
Cable Companies		
Comcast	15,258,000	329,000
Time Warner	8,952,000	225,000
Cox*	4,080,000	80,000
Charter	2,947,100	71,900
Cablevision	2,485,000	30,000
Mediacom	748,000	24,000
Insight	478,500	20,000
Cable ONE	386,101	13,214
RCN	306,000	4,000
Other major private cable companies**	2,115,000	40,000
Total Top Cable	37,755,701	837,114
Telephone Companies		
AT&T	15,436,000	359,000
Verizon	8,925,000	252,000
Qwest	2,889,000	42,000
Embarq	1,452,000	40,000
Windstream	1,009,700	30,900
CenturyTel	665,000	24,000
Frontier	600,047	20,104
FairPoint	300,882	5,522
Cincinnati Bell	235,000	1,800
Total Top Telephone Companies	31,512,629	775,326
Total Broadband	69,268,330	1,612,440

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.LeichtmanResearch.com.

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