



# LRG

Leichtman Research Group

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## **ABOUT 350,000 ADD BROADBAND IN THE SECOND QUARTER OF 2011**

*Over 77 Million Get Broadband from Top Cable and Telephone Companies*

**Durham, NH – August 25, 2011** – Leichtman Research Group, Inc. (LRG) found that the eighteen largest cable and telephone providers in the US – representing about 93% of the market – acquired about 350,000 net additional high-speed Internet subscribers in the second quarter of 2011. Net broadband additions in the quarter were the second fewest of any quarter in the ten years LRG has been tracking the industry.

Other broadband findings for the quarter include:

- Overall, broadband additions in 2Q 2011 amounted to 108% of those in 2Q 2010
- The top cable companies accounted for 77% of the net broadband additions for the quarter versus the top telephone companies
- The top phone companies added about 80,000 subscribers during the quarter – compared to a net loss of 10,000 subscribers in 2Q 2010
- AT&T and Verizon added 628,000 fiber subscribers in the quarter (via U-verse and FiOS), while having a net loss of 578,000 DSL subscribers
- The top cable companies added over 270,000 broadband subscribers in the quarter – about 81% of the additions during the same quarter a year ago
- The top cable broadband providers have a 56% share of the overall market, with 8.9 million more subscribers than the top telephone companies – compared to 7.85 million this time a year ago

“The second quarter is traditionally the slowest of the year for industry growth. Net broadband additions in 2Q 2011 were over 900,000 less than in 1Q 2011, but slightly higher than last year’s second quarter,” said Bruce Leichtman, president and principal

analyst for Leichtman Research Group, Inc. “Over the past year, the top broadband providers have added 3.3 million subscribers, about 91% of the net additions over the prior year.”

<b>Broadband Internet</b>	<b>Subscribers at end of 2Q 2011</b>	<b>Net Adds in 2Q 2011</b>
<b><i>Cable Companies</i></b>		
Comcast	17,550,000	144,000
Time Warner	10,062,000	67,000
Cox*	4,425,000	25,000
Charter	3,352,500	18,500
Cablevision	2,932,000	5,000
Suddenlink	914,200	(4,600)
Mediacom	855,000	0
Insight	537,500	1,800
Cable ONE	444,357	4,142
Other major private companies**	1,898,000	11,000
<b>Total Top Cable</b>	<b>42,970,557</b>	<b>271,842</b>
<b><i>Telephone Companies</i></b>		
AT&T	16,473,000	(12,000)
Verizon	8,552,000	62,000
CenturyLink^	5,427,000	12,000
Frontier	1,715,119	7,441
Windstream	1,336,500	4,800
FairPoint	305,155	7,664
Cincinnati Bell	257,900	(600)
<b>Total Top Telephone Companies</b>	<b>34,066,674</b>	<b>81,305</b>
<b>Total Broadband</b>	<b>77,037,231</b>	<b>353,147</b>

Sources: The Companies and Leichtman Research Group, Inc.

\* LRG estimate

\*\* Includes LRG estimates for Bright House Networks, and RCN

^ CenturyLink acquired Qwest on 4/1/11

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

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