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Leichtman Research Group

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OVER 900,000 ADD BROADBAND IN THE THIRD QUARTER OF 2009

70.8 Million Get Broadband from Top Cable and Telephone Companies

Durham, NH – November 13, 2009 – Leichtman Research Group, Inc. (LRG) found that the nineteen largest cable and telephone providers in the US – representing about 93% of the market – acquired 910,000 net additional high-speed Internet subscribers in the third quarter of 2009. These top broadband providers now account for over 70.8 million subscribers – with cable companies having 38.7 million broadband subscribers, and telephone companies having about 32.2 million subscribers.

Other broadband findings for the quarter include:

- The top cable companies added about 650,000 subscribers, representing 72% of the net broadband additions for the quarter versus the top telephone companies
- Overall, broadband additions in 3Q 2009 amounted to 70% of those in 3Q 2008 – with cable having 75% as many additions as a year ago, and Telcos having 60% as many adds as a year ago
- Comcast had 362,000 net broadband adds in 3Q 2009 – more than the combined adds for all Telcos
- The top cable broadband providers have a 55% share of the overall market

“While the top cable and telephone companies now account for over 70 million subscribers, the market was still able to add over 900,000 subscribers in 3Q 2009,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc.

“Over the past year, the top broadband providers have added nearly 4.2 million subscribers – with cable providers accounting for 53% of the total.”

Broadband Internet	Subscribers at end of 3Q 2009	Net Adds in 3Q 2009
Cable Companies		
Comcast	15,684,000	362,000
Time Warner	9,167,000	121,000
Cox*	4,150,000	40,000
Charter	3,010,100	52,400
Cablevision	2,522,000	19,000
Mediacom	765,000	11,000
Insight	493,400	11,900
Cable ONE	388,567	2,095
RCN	309,000	2,000
Other major private cable companies**	2,170,000	32,500
Total Top Cable	38,659,067	653,895
Telephone Companies		
AT&T	15,638,000	90,000
Verizon	9,174,000	63,000
Qwest	2,951,000	28,000
CenturyLink^	2,189,000	43,500
Windstream	1,050,500	25,900
Frontier	621,331	7,521
FairPoint*	295,000	(1,107)
Cincinnati Bell	234,500	(900)
Total Top Telephone Companies	32,153,331	255,914
Total Broadband	70,812,398	909,809

Sources: The Companies and Leichtman Research Group, Inc.

* LRG estimate

** Includes LRG estimates for Bright House Networks and Suddenlink

^ On July 1, 2009 CenturyTel and Embarq merged to form CenturyLink

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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