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Leichtman Research Group

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ABOUT 700,000 ADD BROADBAND IN THE THIRD QUARTER OF 2014

86.6 Million Get Broadband from Top Cable and Telephone Companies

Durham, NH – November 18, 2014 – Leichtman Research Group, Inc. (LRG) found that the seventeen largest cable and telephone providers in the US – representing about 94% of the market – acquired over 700,000 net additional high-speed Internet subscribers in the third quarter of 2014. These top broadband providers now account for 86.6 million subscribers – with top cable companies having over 51.2 million broadband subscribers, and top telephone companies having nearly 35.4 million subscribers.

Other broadband findings include:

- Overall, broadband additions in 3Q 2014 amounted to 135% of those in 3Q 2013
- The top cable companies accounted for 83% of the net broadband additions for the quarter versus the top telephone companies
- The top cable companies added about 580,000 broadband subscribers, representing 133% of the net additions for the top cable companies in 3Q 2013
- The top telephone companies added about 120,000 broadband subscribers in 3Q 2014 – compared to a gain of about 80,000 in 3Q 2013
- Over the past year, there were about 2,930,000 net broadband adds – compared to about 2,540,000 over the prior year, and 2,925,000 two years ago

“Despite there being 86.6 million broadband subscribers in the US via major cable and Telco providers, the industry has added subscribers at a faster pace over the past year than it did over the prior year,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “Over the past year, cable companies accounted for 86% of the 2.9 million net broadband adds.”

Broadband Internet	Subscribers at end of 3Q 2014	Net Adds in 3Q 2014
Cable Companies		
Comcast	21,586,000	315,000
Time Warner	12,073,000	108,000
Charter	4,956,000	106,000
Cablevision	2,756,000	(23,000)
Suddenlink	1,135,500	32,200
Mediacom	997,000	10,000
WOW (WideOpenWest)*	729,700	-
Cable ONE	486,142	3,417
Other major private cable companies**	6,505,000	30,000
Total Top Cable	51,224,342	581,617
Telephone Companies		
AT&T	16,486,000	38,000
Verizon	9,146,000	69,000
CenturyLink	6,063,000	8,000
Frontier^	1,922,000	21,500
Windstream	1,142,000	(11,800)
FairPoint	329,494	(3,927)
Cincinnati Bell	270,500	200
Total Top Telephone Companies	35,358,994	120,973
Total Broadband	86,583,336	702,590

Sources: The Companies and Leichtman Research Group, Inc.

* Includes a small system sale, the Company did not report net adds on a pro forma basis

** 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 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 ongoing consumer surveys with industry tracking and analysis, to provide companies with a richer understanding of current market conditions, and 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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