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Leichtman Research Group

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ABOUT 520,000 ADD BROADBAND IN THE THIRD QUARTER OF 2013

83.6 Million Get Broadband from Top Cable and Telephone Companies

Durham, NH – November 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 about 520,000 net additional high-speed Internet subscribers in the third quarter of 2013. These top broadband providers now account for over 83.6 million subscribers – with top cable companies having nearly 48.7 million broadband subscribers, and top telephone companies having over 34.9 million subscribers.

Other broadband findings for the quarter include:

- Overall, broadband additions in 3Q 2013 amounted to 90% of those in 3Q 2012
- The top cable companies accounted for 84% of the net broadband additions for the quarter versus the top telephone companies
- The top cable companies added about 440,000 subscribers, representing 76% as many additions as in 3Q 2012
- The top telephone companies added about 80,000 subscribers, compared to a gain of about 4,000 in 3Q 2012
- AT&T and Verizon added 828,000 fiber subscribers (via U-verse and FiOS) in 3Q 2013, while having a net loss of 798,000 DSL subscribers. U-verse and FiOS broadband subscribers now account for 45% of Telco broadband subscribers – compared to 36% a year ago

“With top providers now having over 83.6 million subscribers, the broadband industry continues to grow, but at a slightly slower pace than a year ago,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “In the first three quarters of 2013, the top providers added about 1,930,000 subscribers, compared to about 2,150,000 in the first three quarters of 2012.”

Broadband Internet	Subscribers at end of 3Q 2013	Net Adds in 3Q 2013
Cable Companies		
Comcast	20,283,000	297,000
Time Warner	11,550,000	(9,000)
Charter	4,535,000	98,000
Cablevision	2,774,000	(13,000)
Suddenlink	1,039,100	21,900
Mediacom	956,000	7,000
WOW (WideOpenWest)*	725,000	16,000
Cable ONE	469,296	5,004
Other major private cable companies**	6,350,000	15,000
Total Top Cable	48,681,396	437,904
Telephone Companies		
AT&T	16,427,000	(26,000)
Verizon	8,995,000	56,000
CenturyLink	5,942,000	33,000
Frontier^	1,808,000	26,500
Windstream	1,183,400	(11,100)
FairPoint	330,698	(1,922)
Cincinnati Bell	265,600	3,900
Total Top Telephone Companies	34,951,698	80,378
Total Broadband	83,633,094	518,282

Sources: The Companies and Leichtman Research Group, Inc.

* WOW was added as one of the top cable broadband providers this quarter, replacing RCN

** 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 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.

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