

Fiber-to-the-Home Council North America

TAP INTO THE MOST VALUABLE BROADBAND RESOURCE AVAILABLE



North American FTTH/FTTP Status

Presented by:
Michael C. Render

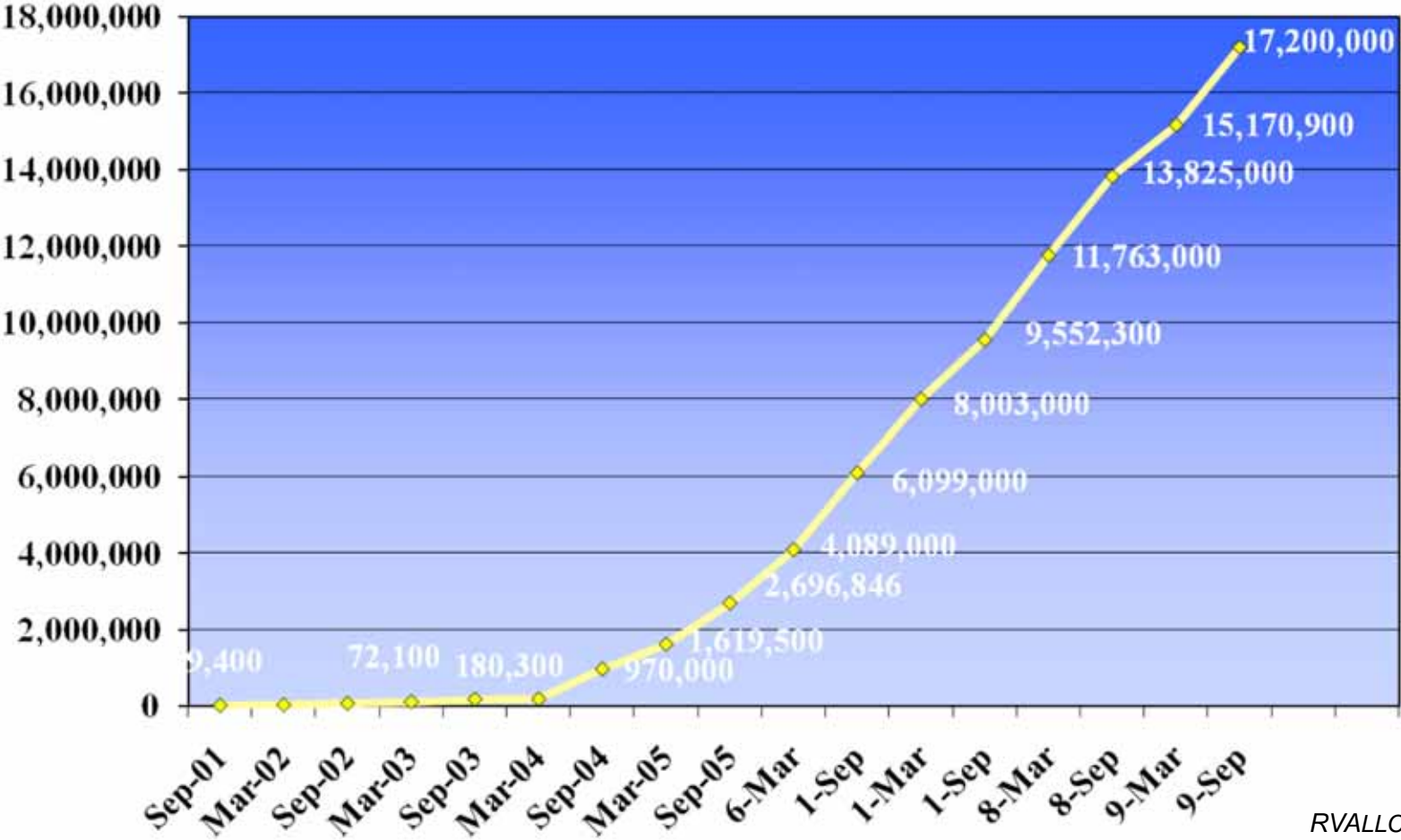
RVA LLC
Market Research & Consulting



FTTH Continues To Grow

FTTH Homes Passed

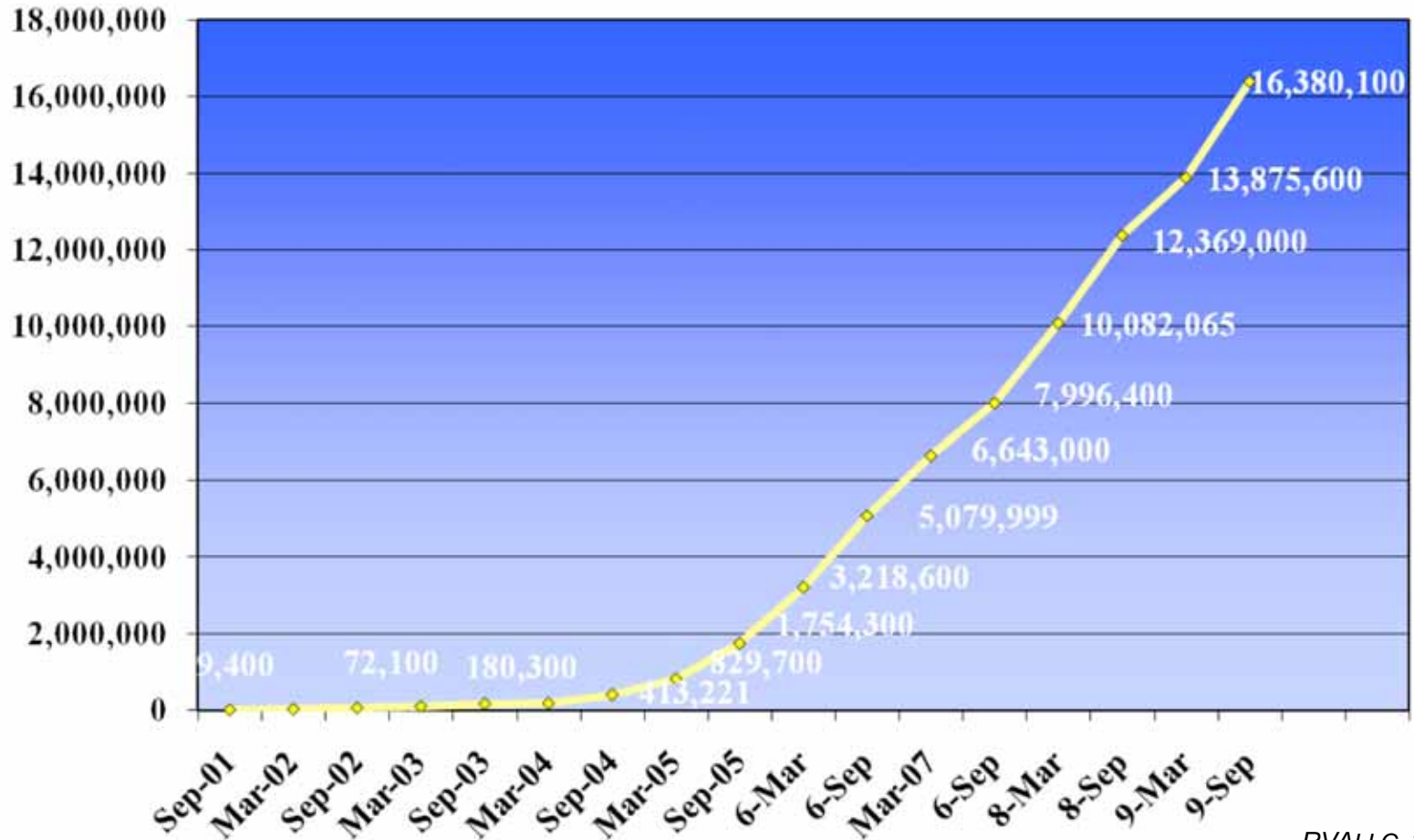
Cumulative – North America



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FTTH Homes Marketed

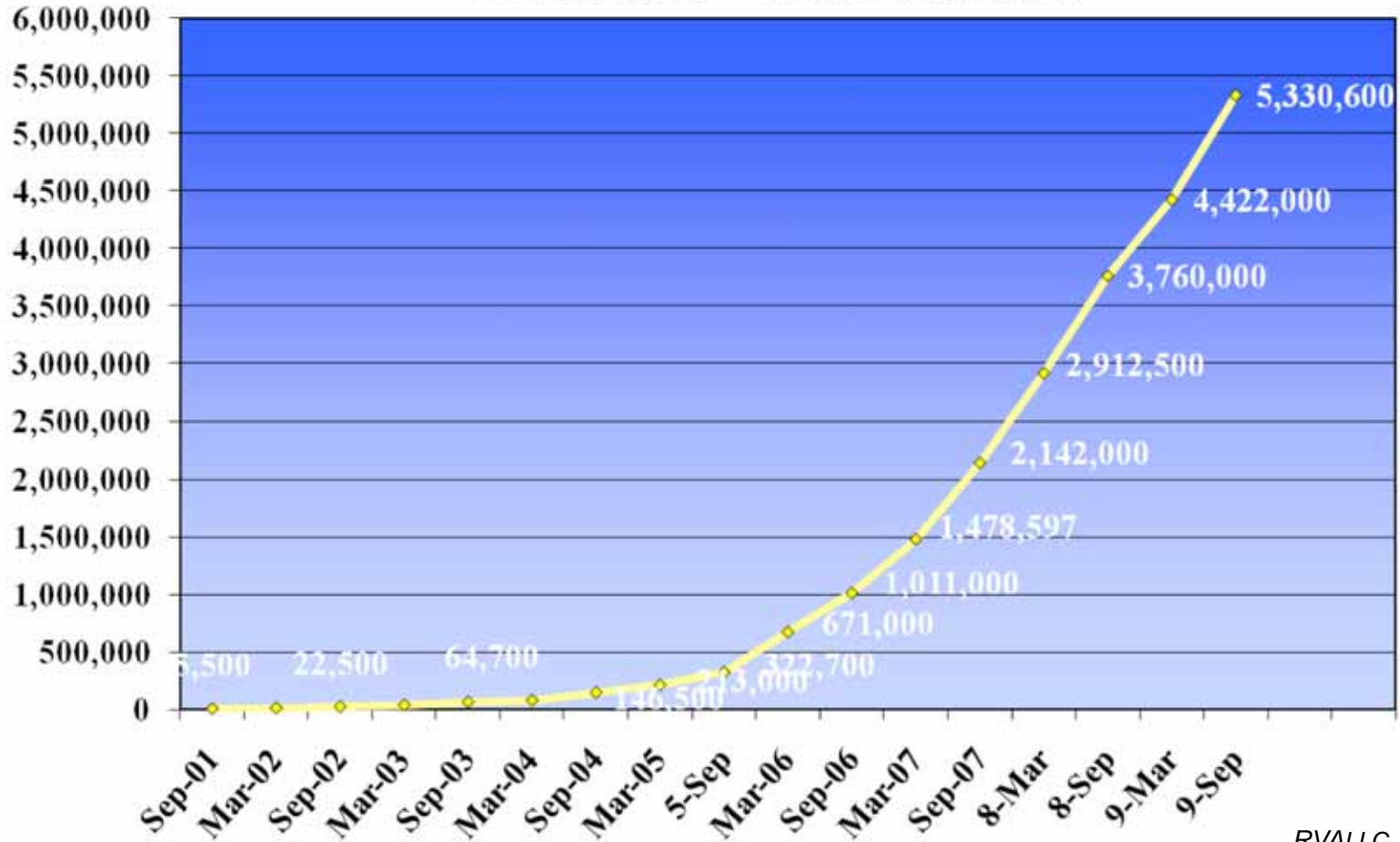
Cumulative – North America



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FTTH Homes Connected

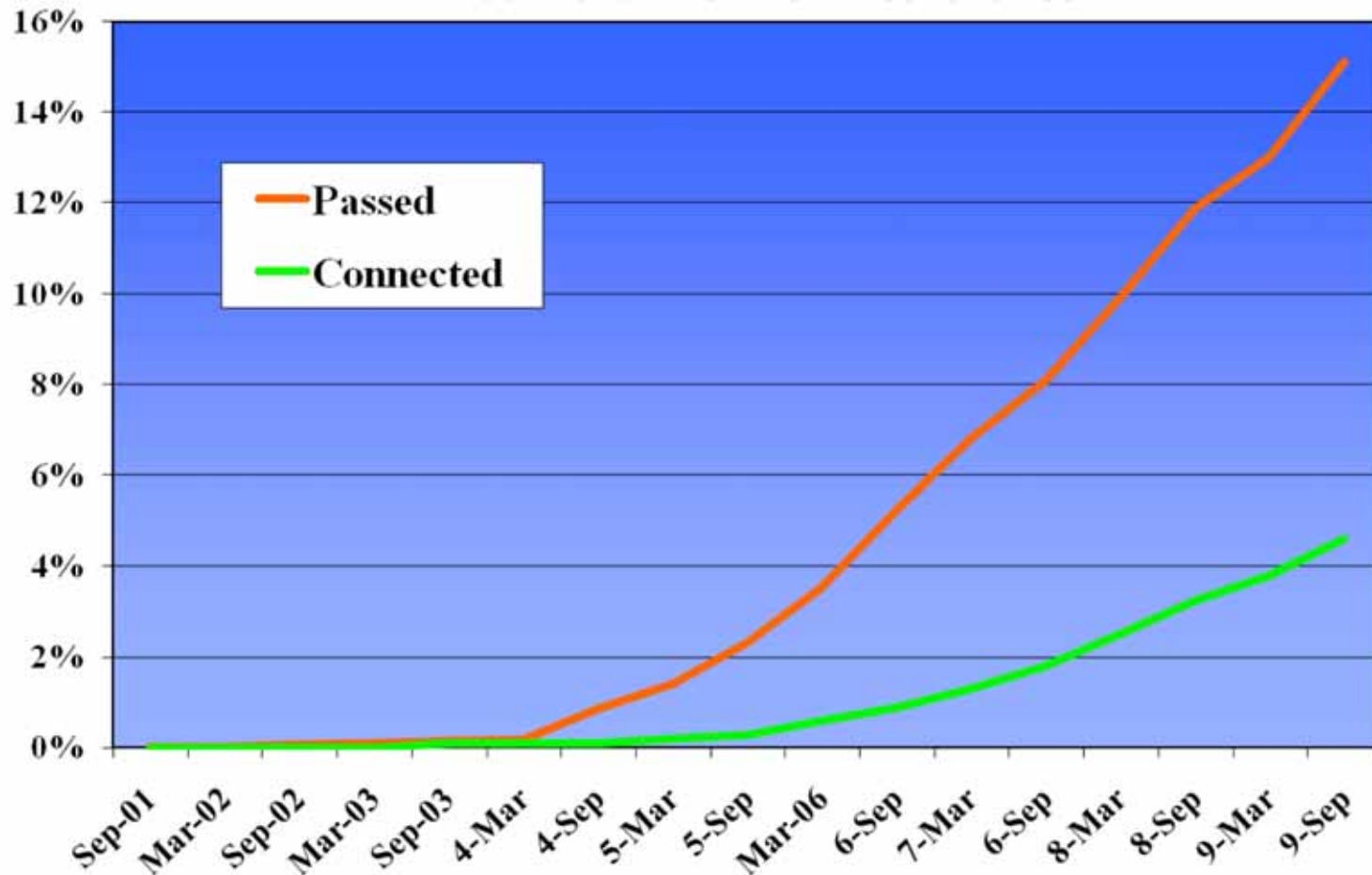
Cumulative – North America



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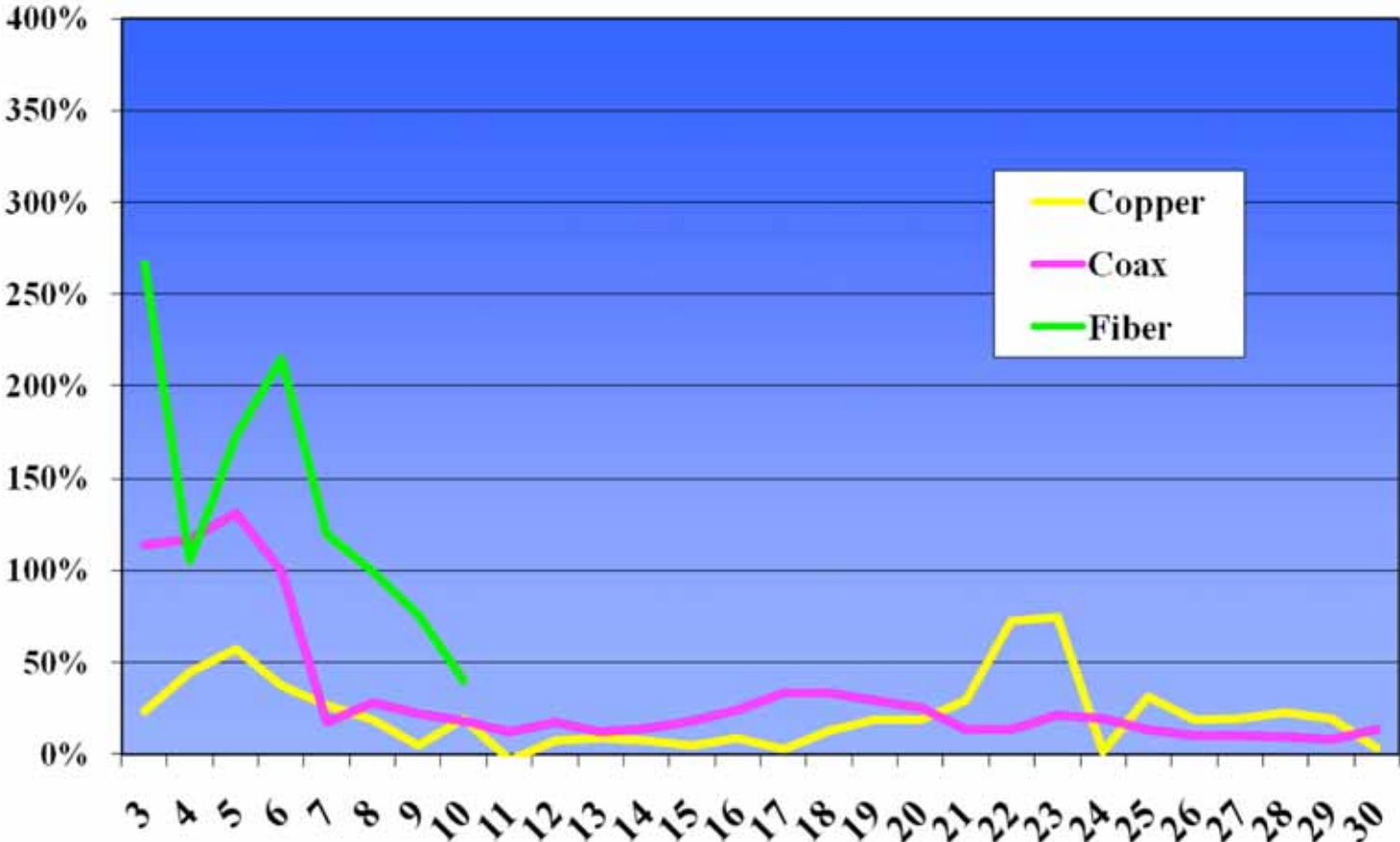
FTTH Penetration

Cumulative – United States



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Homes Connected Year-to-Year Growth (12 month averages)



Note: Years since start of installations

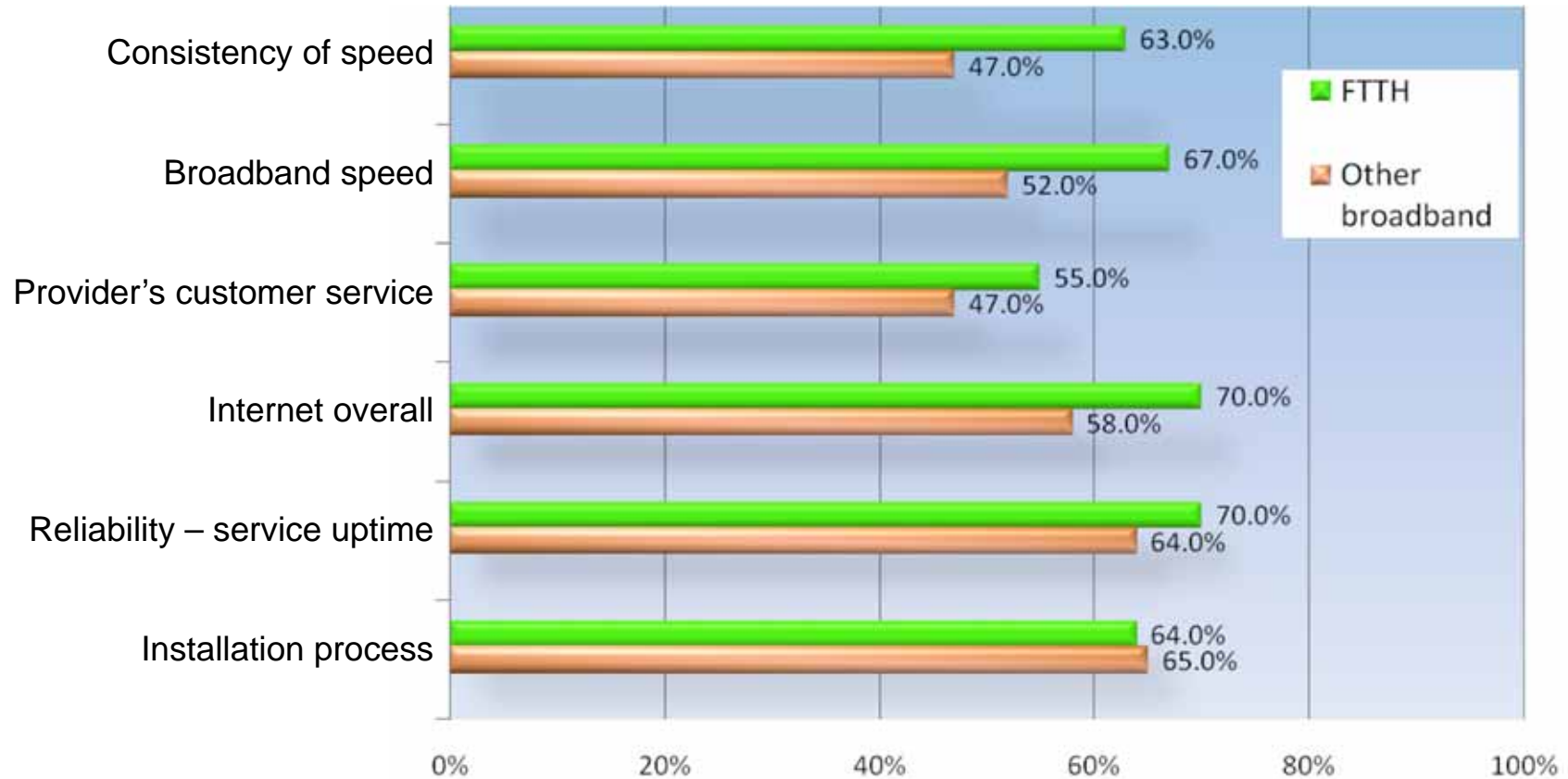
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Penetration Is Not Even

FTTH Is Perceived To Be Better

FTTH Satisfaction

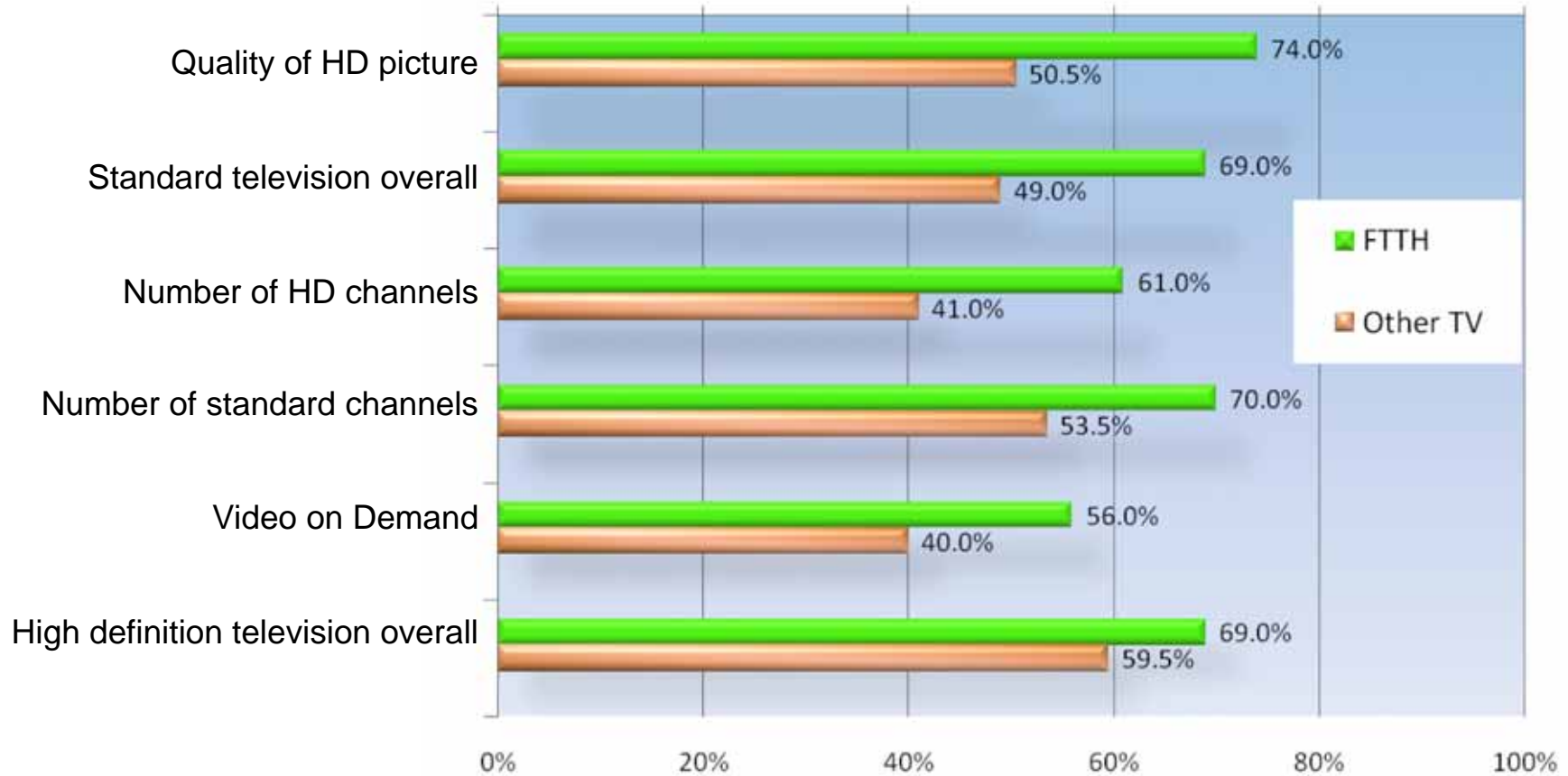
% Very Satisfied



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FTTH Satisfaction

% Very Satisfied



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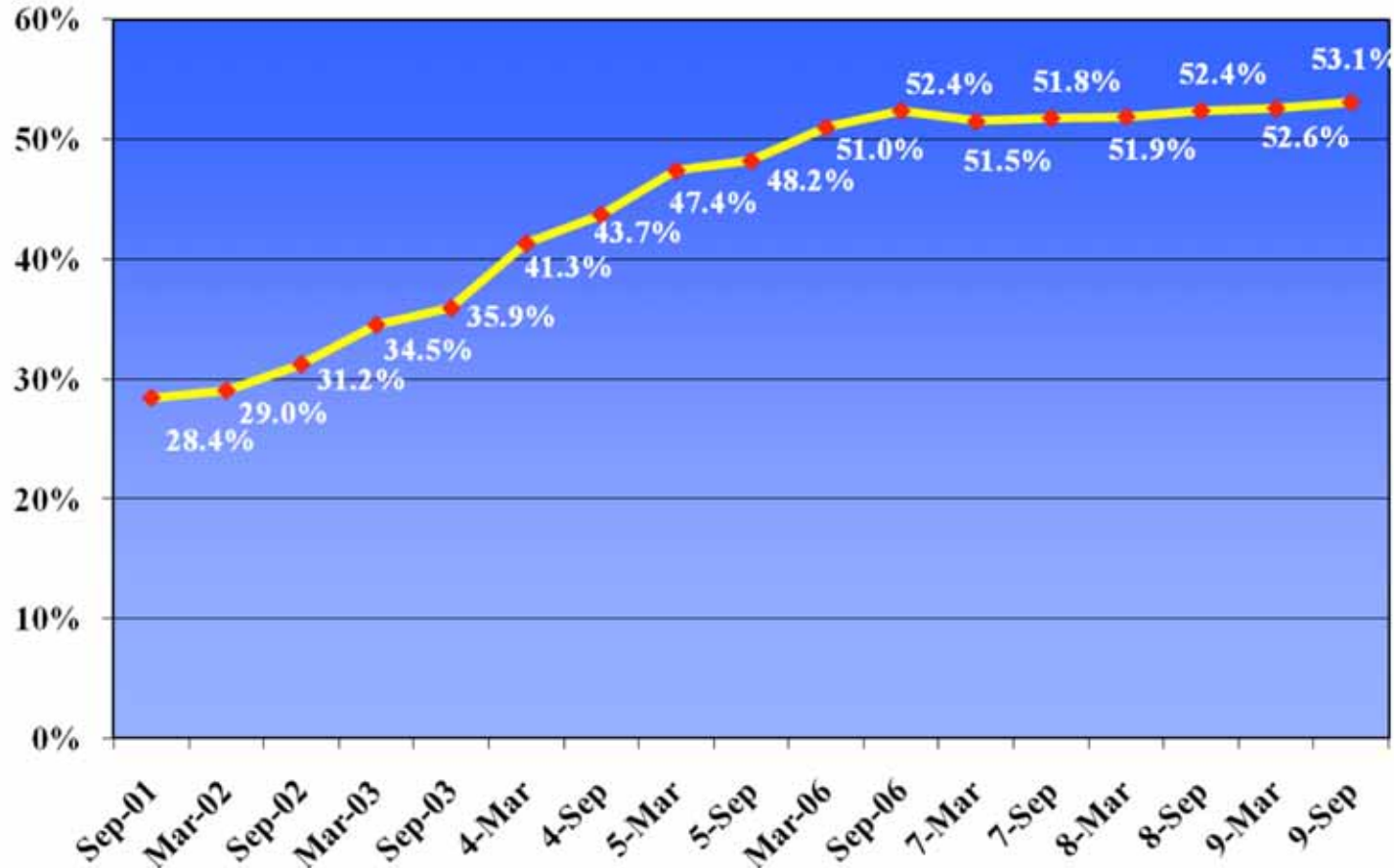
Overall Take-Rate For FTTH (Cumulative – North America)



Note: Percent of all homes-marketed taking something over fiber..

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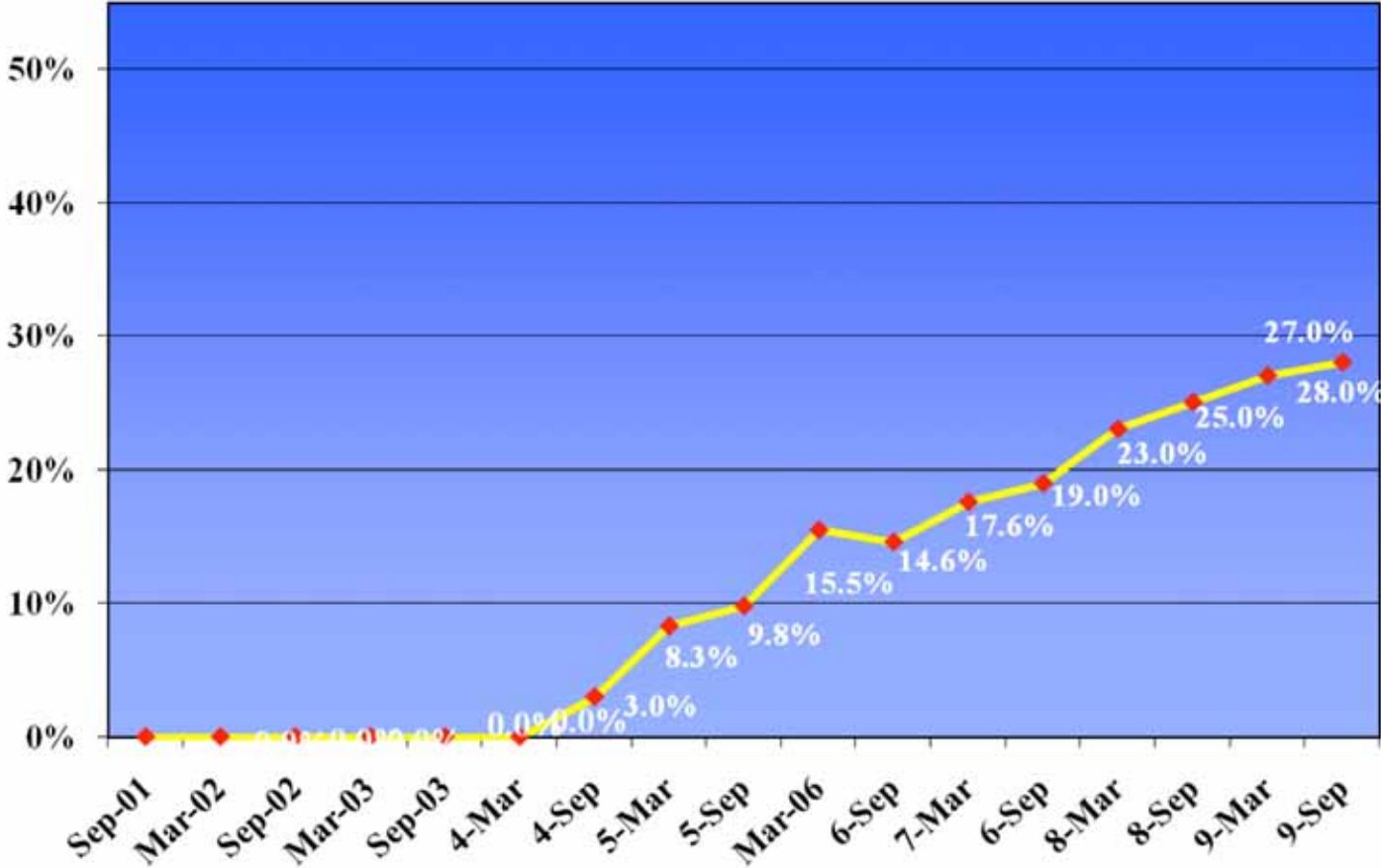
Overall Take-Rate For FTTH Non RBOC Cumulative – North America By Year



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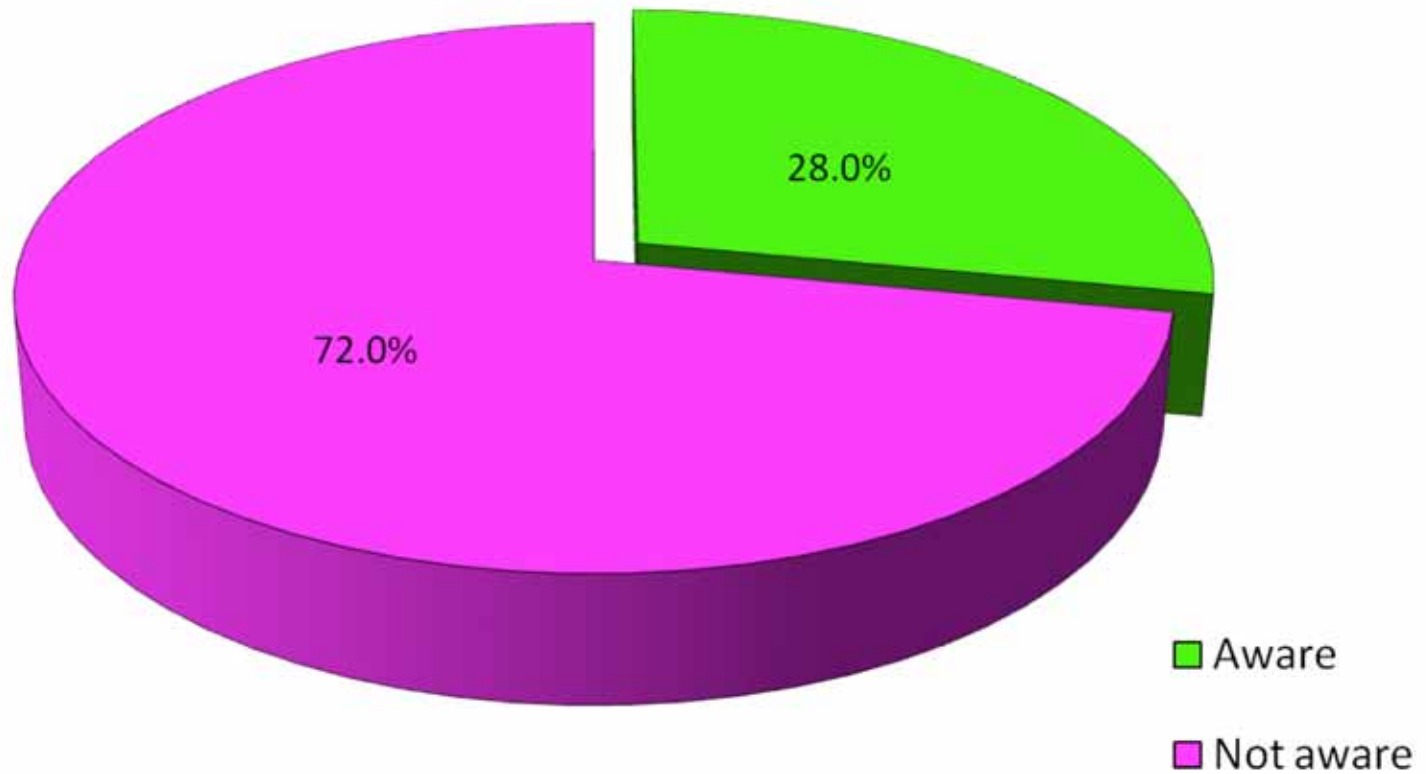
RBOC Take-Rate For FTTH

Cumulative – North America



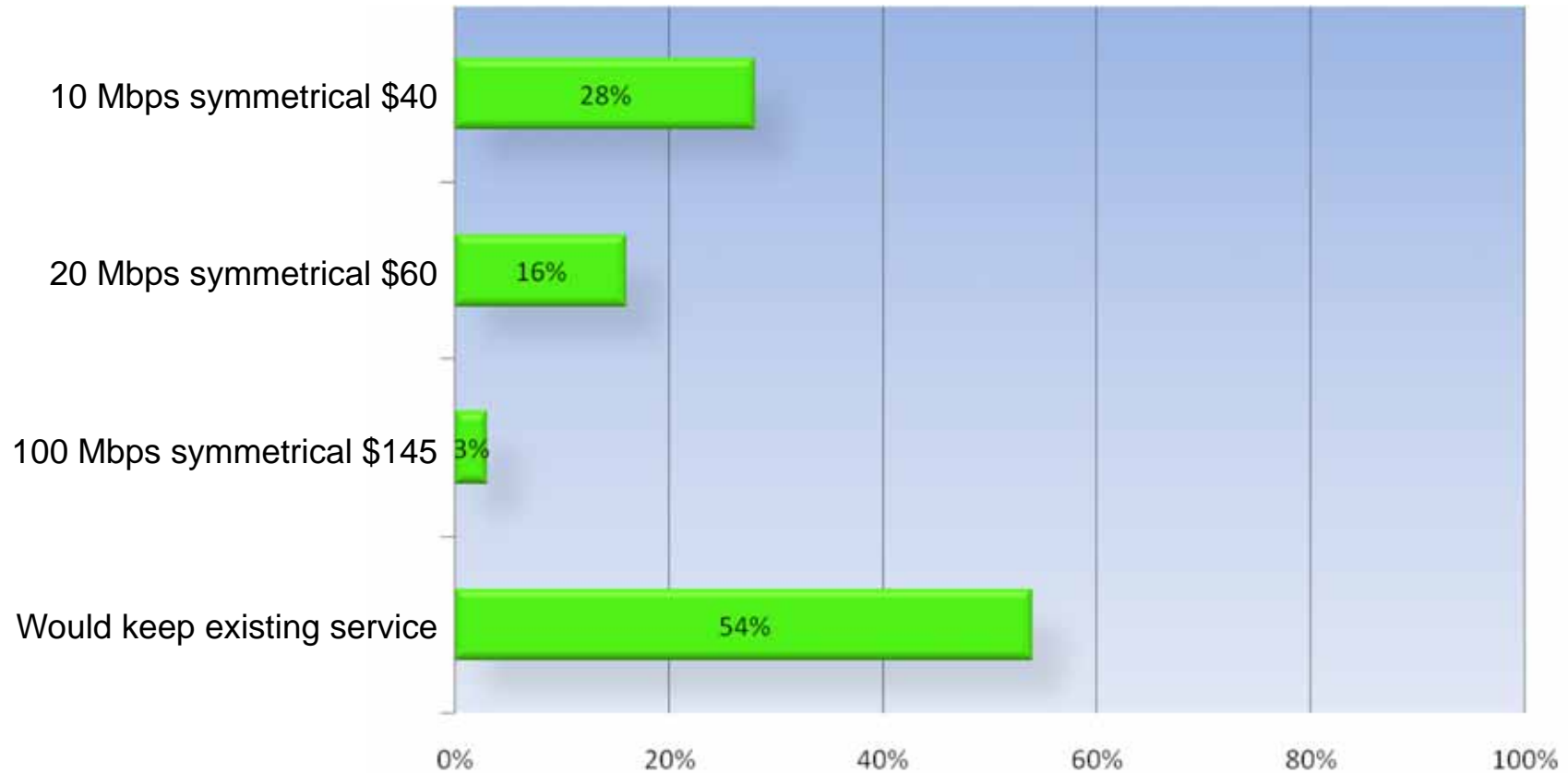
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General Public Awareness Of FTTH



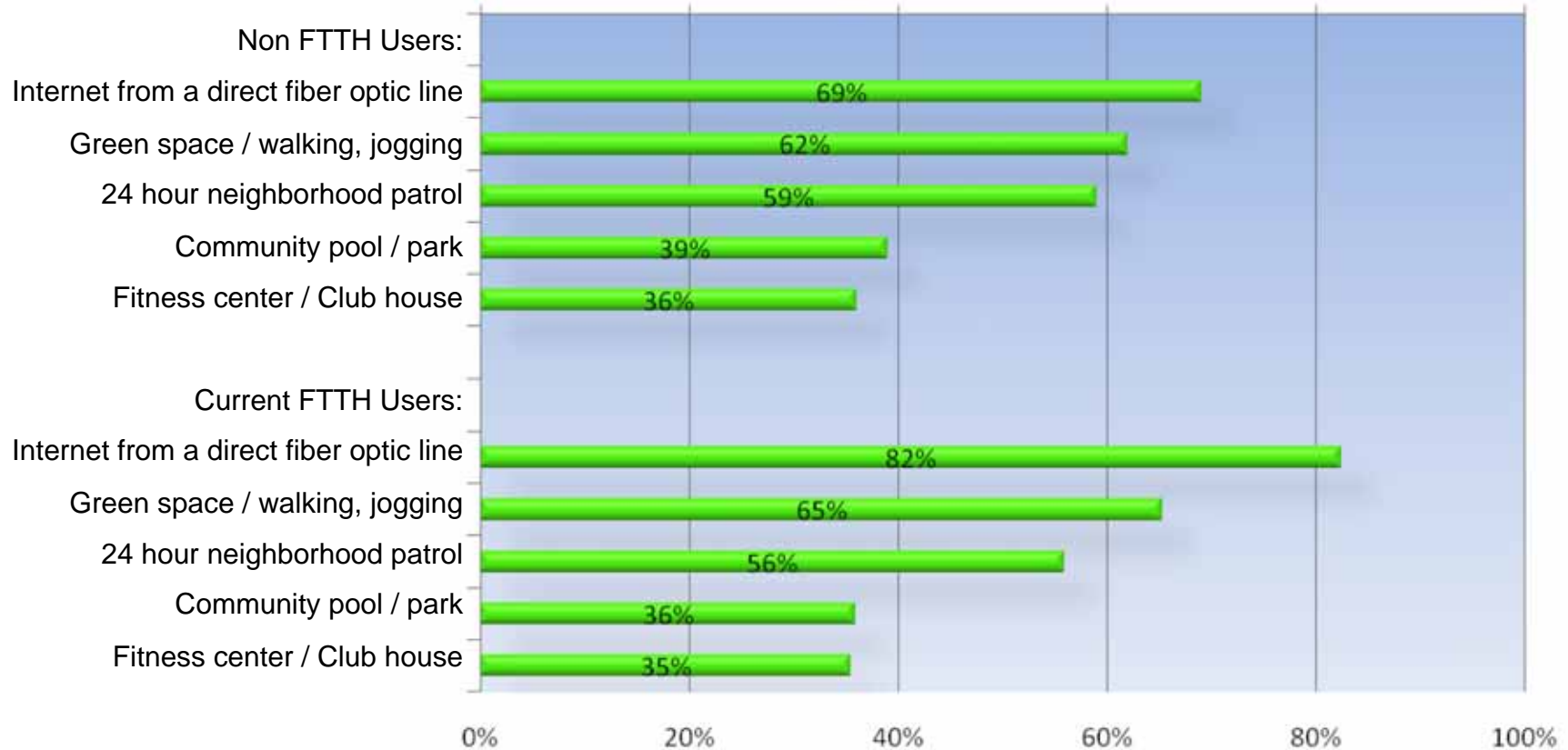
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General Public Interest in FTTH If Available



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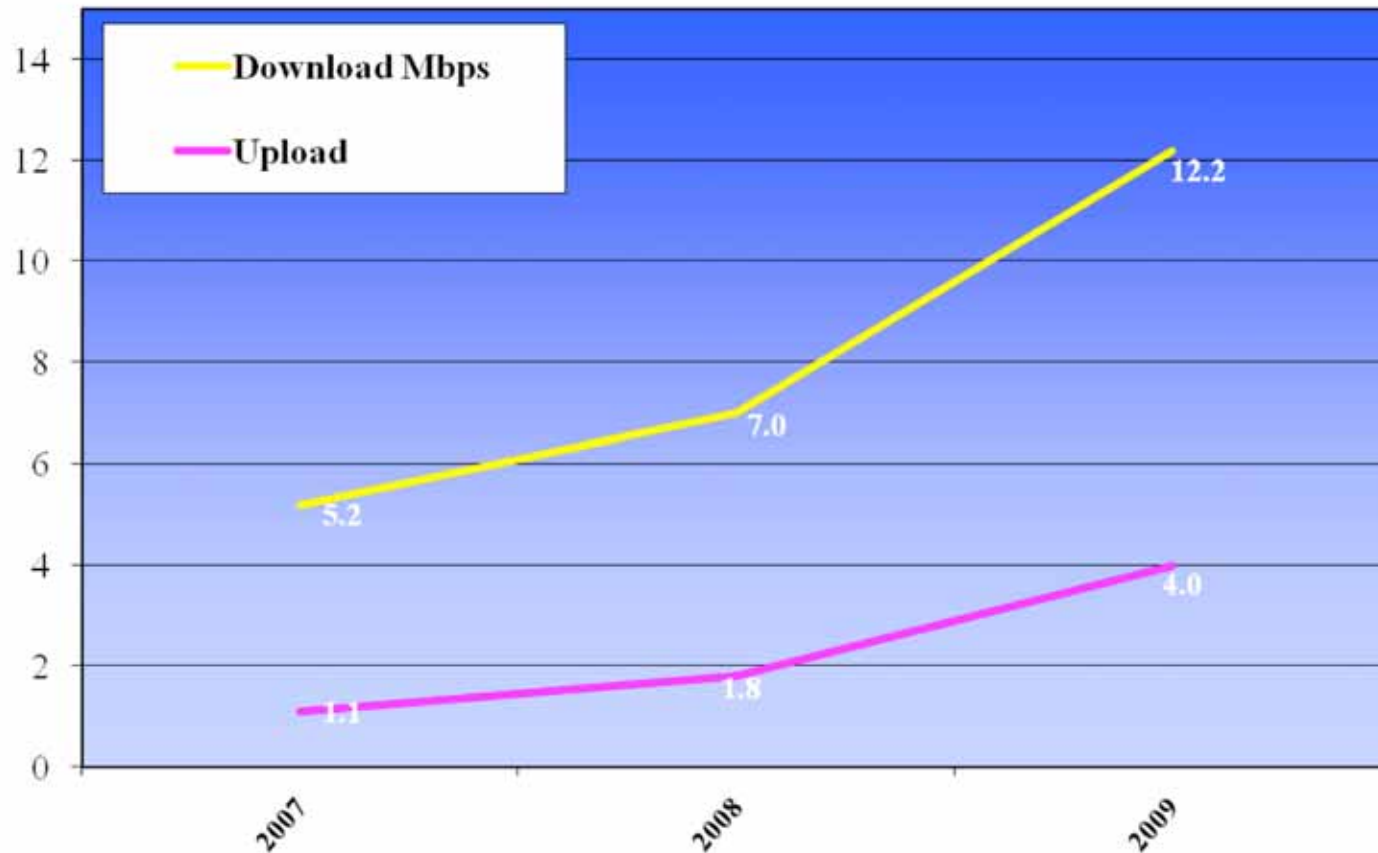
Importance Of Development Amenities If Shopping For New Home



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FTTH Is Better

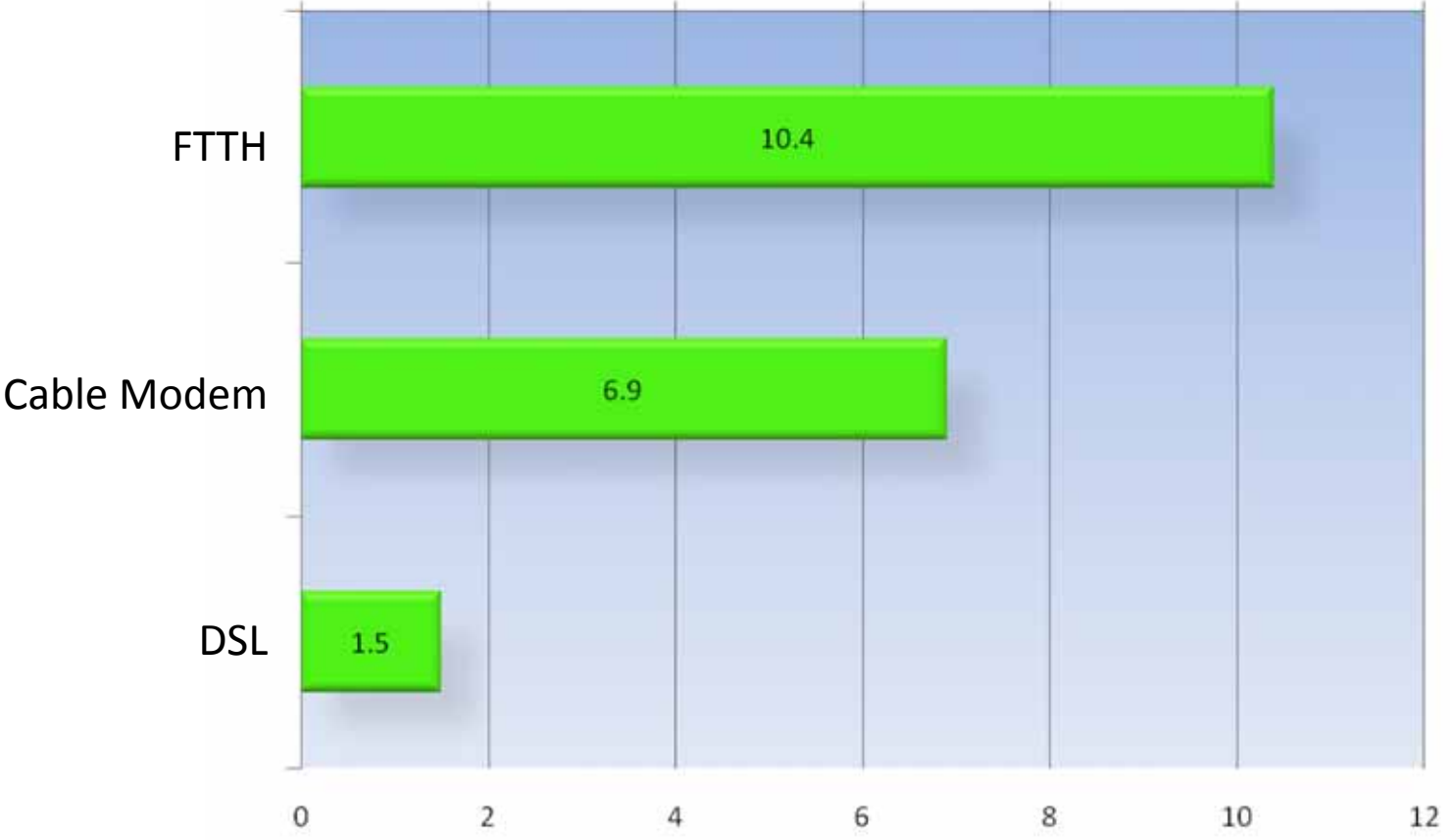
FTTH Tested Average Bandwidth Trends



Median download is 10.4 and upload is 2.4

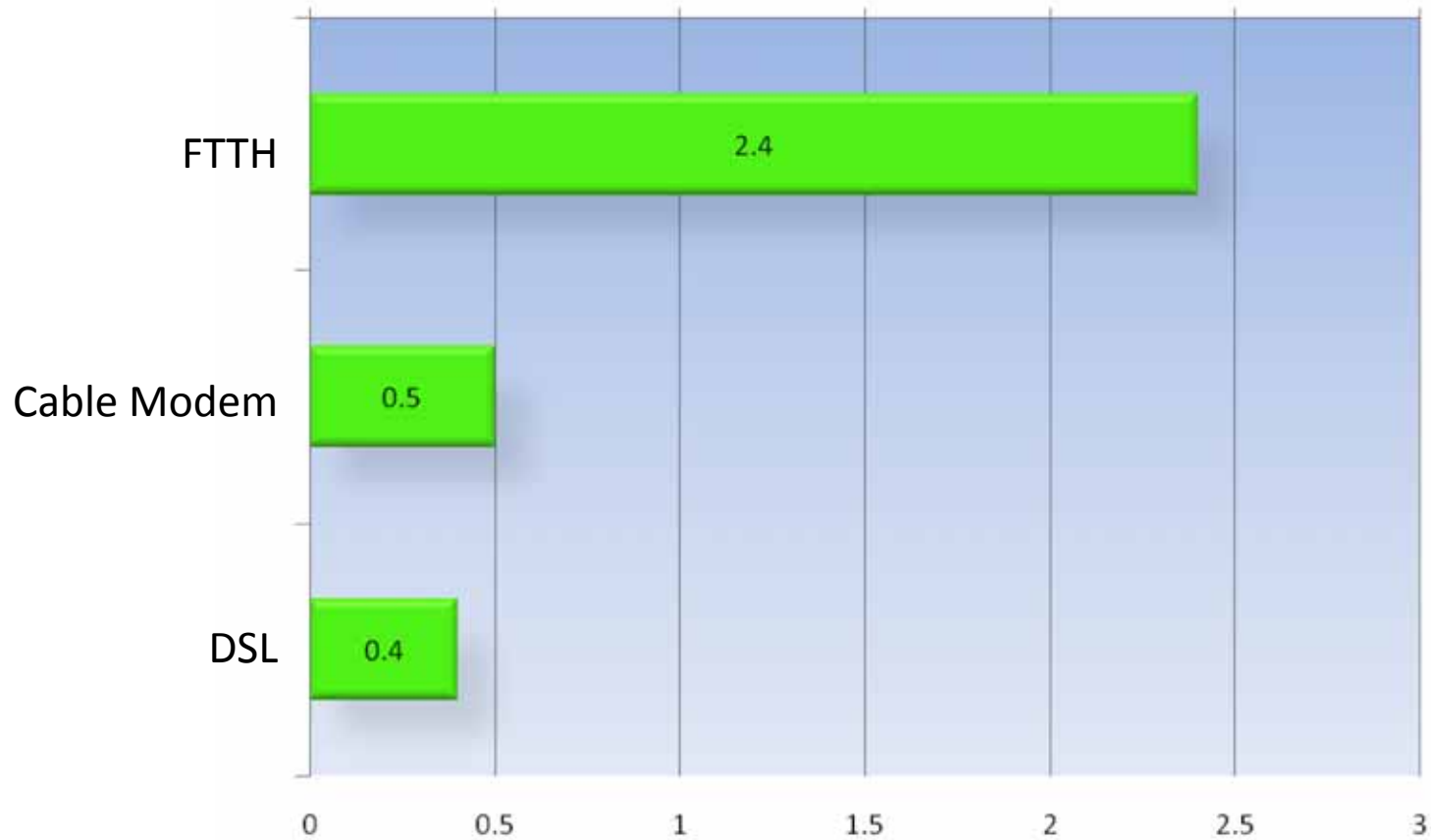
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Download Performance Of Broadband (Median)

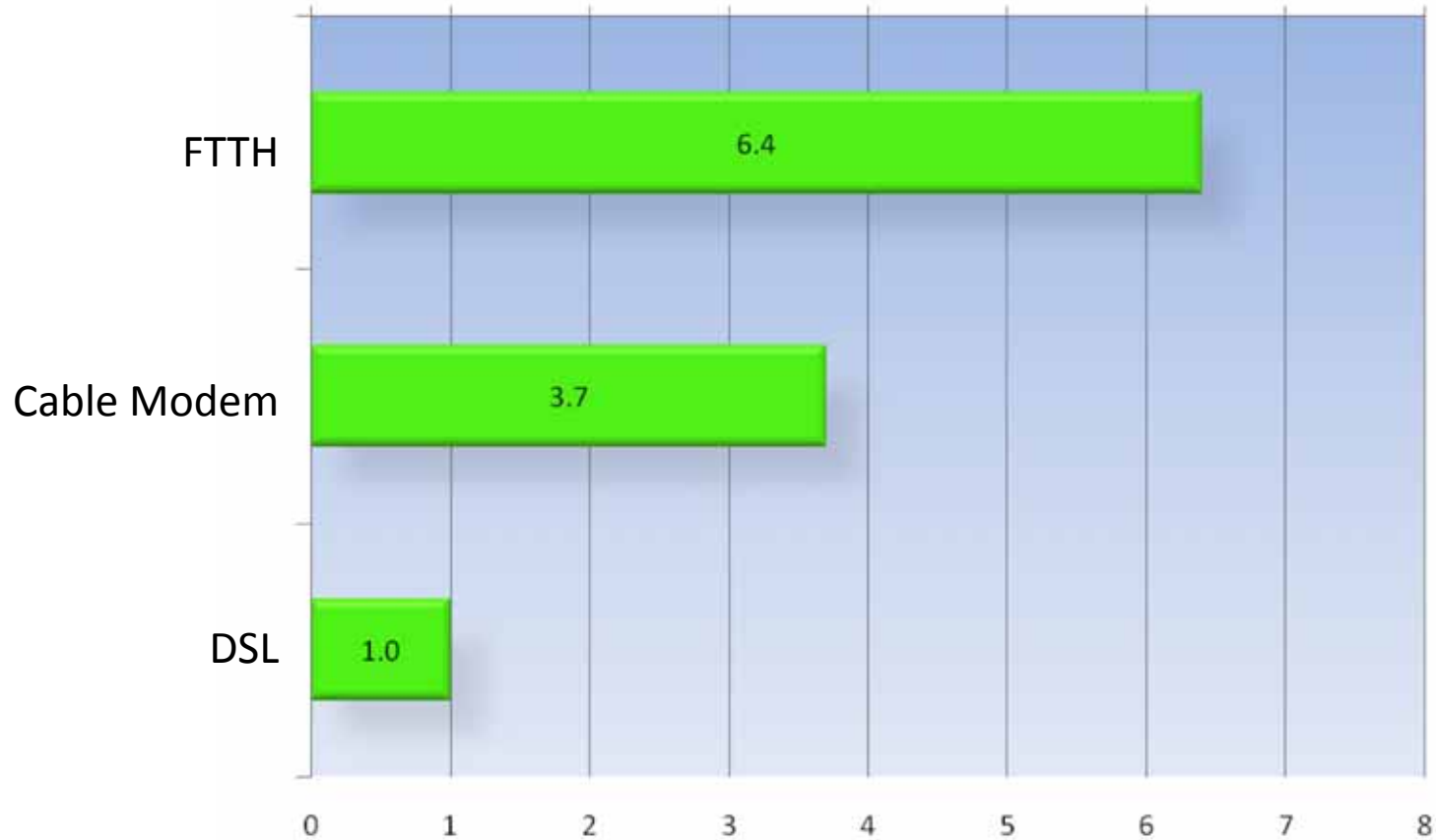


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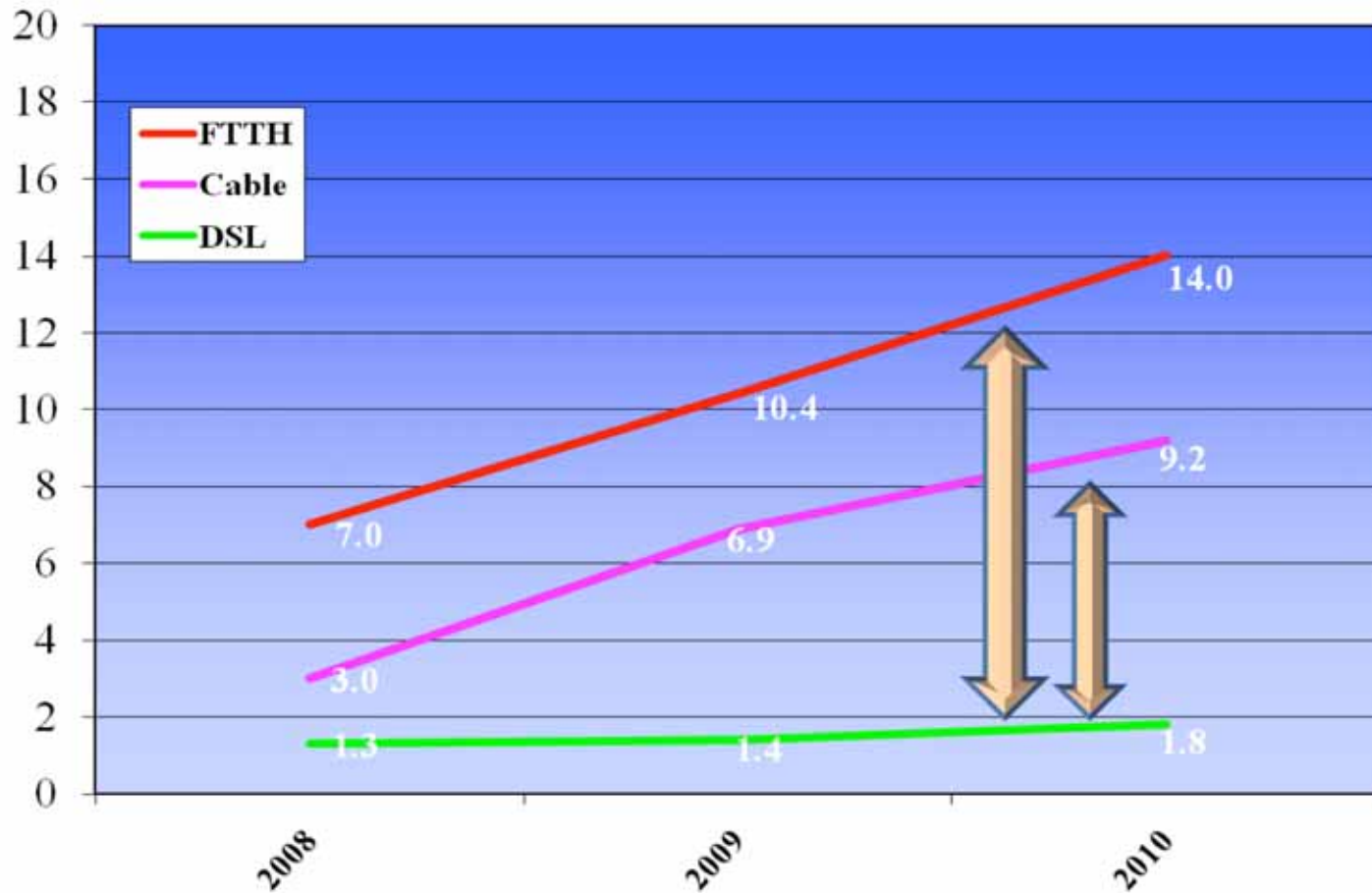
Upload Performance Of Broadband (Median)



Download/Upload Performance Of Broadband (Median)



Bandwidth Gaps



2008 and 2010 are projections only

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FTTH Changes Behavior

2009 Research Shows FTTH Users Work Nearly Two Additional Days Per Month At Home Due To FTTH

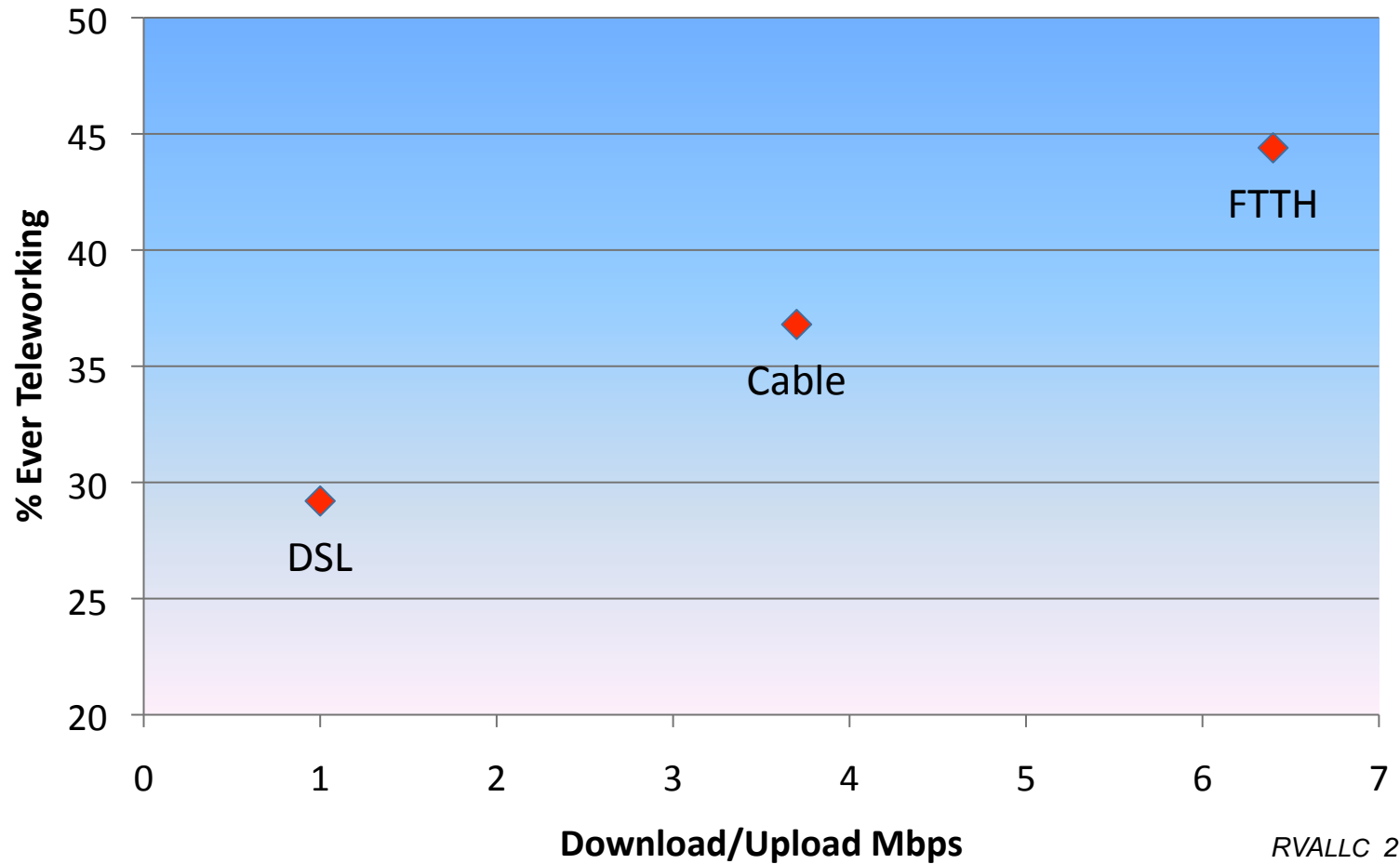


Days worked from home increased:

- Nearly 17% work more from home directly because of FTTH – an average of 12 days more

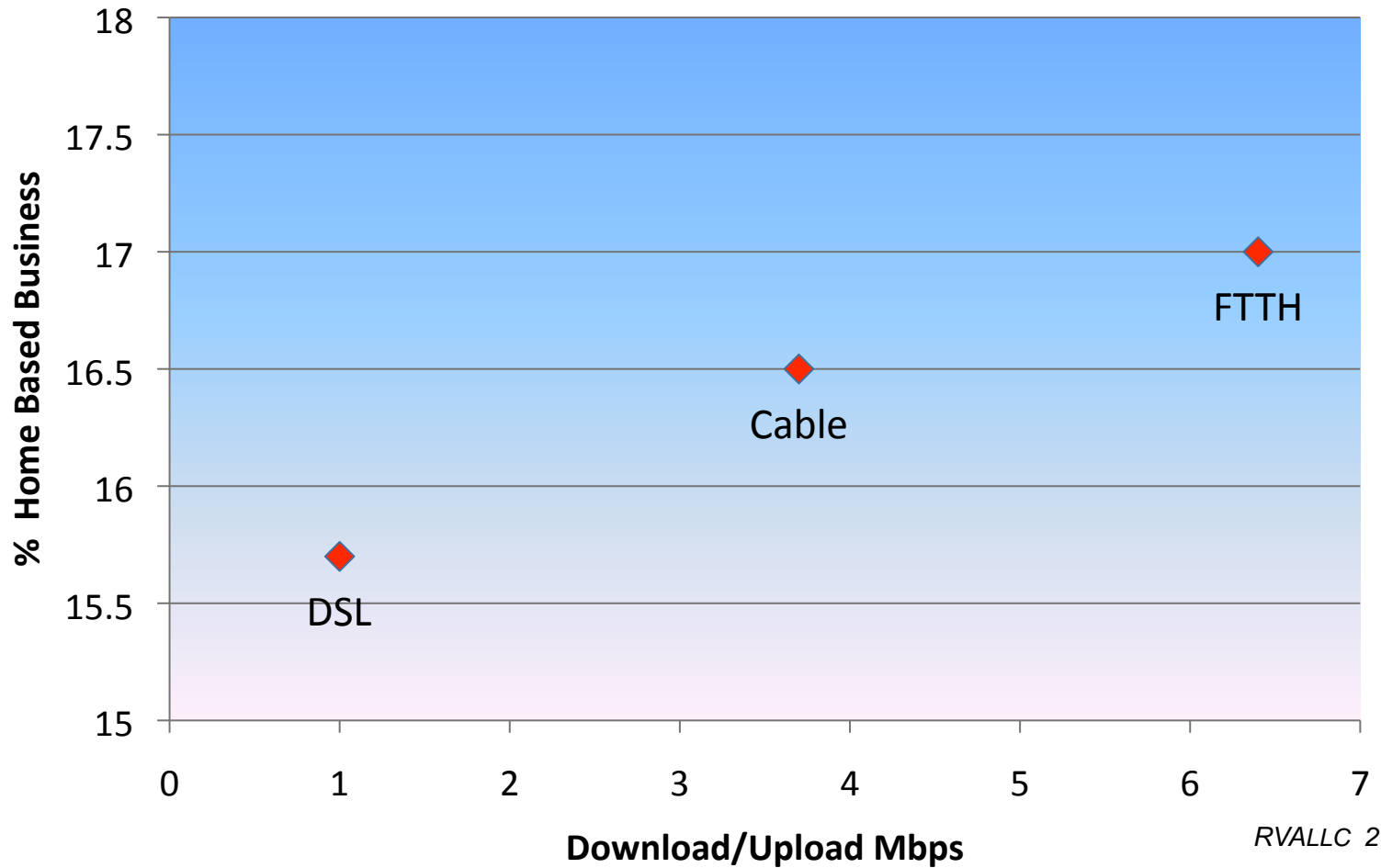
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Telework To Broadband Speed Correlation



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Home Based Business To Broadband Speed Correlation



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