



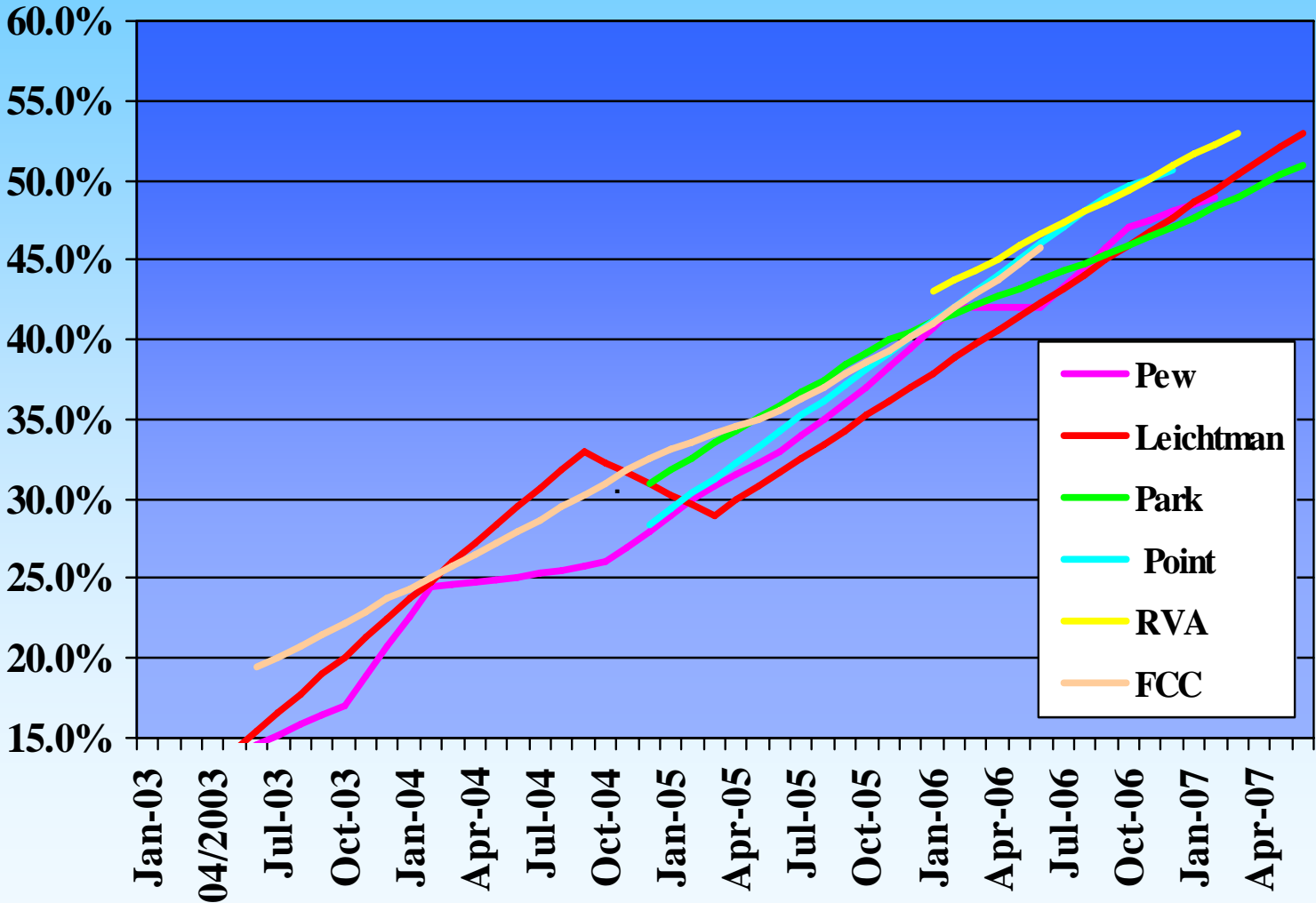
FTTH/FTTP Update

November, 2007

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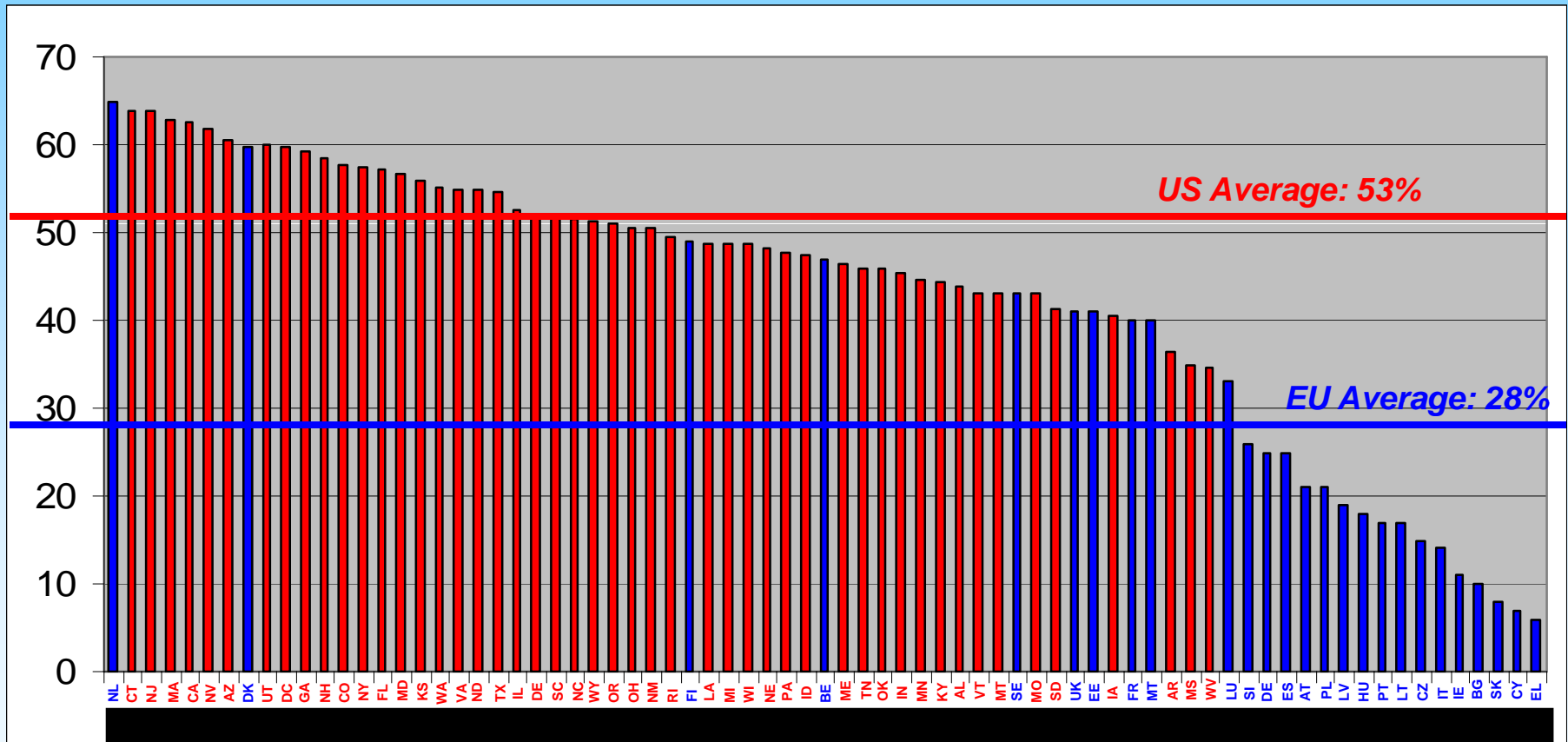
Broadband Penetration

Estimates of U.S. Broadband Household Penetration From Different Sources



Note: FCC data before 2005 includes small business
For all methods, linear trends filled between data points

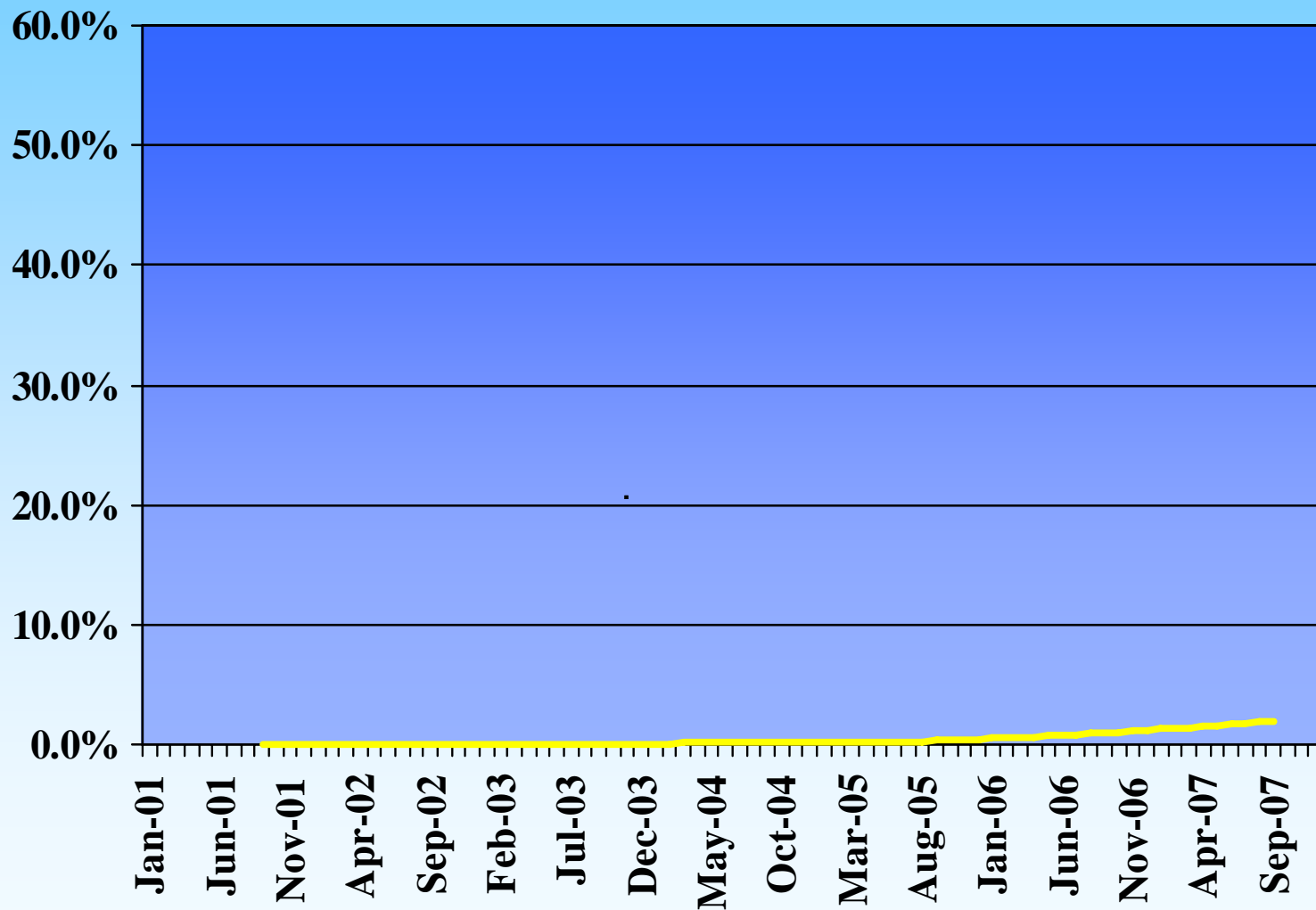
Household Internet Adoption (% of households taking broadband) – US States and EU Member Countries –



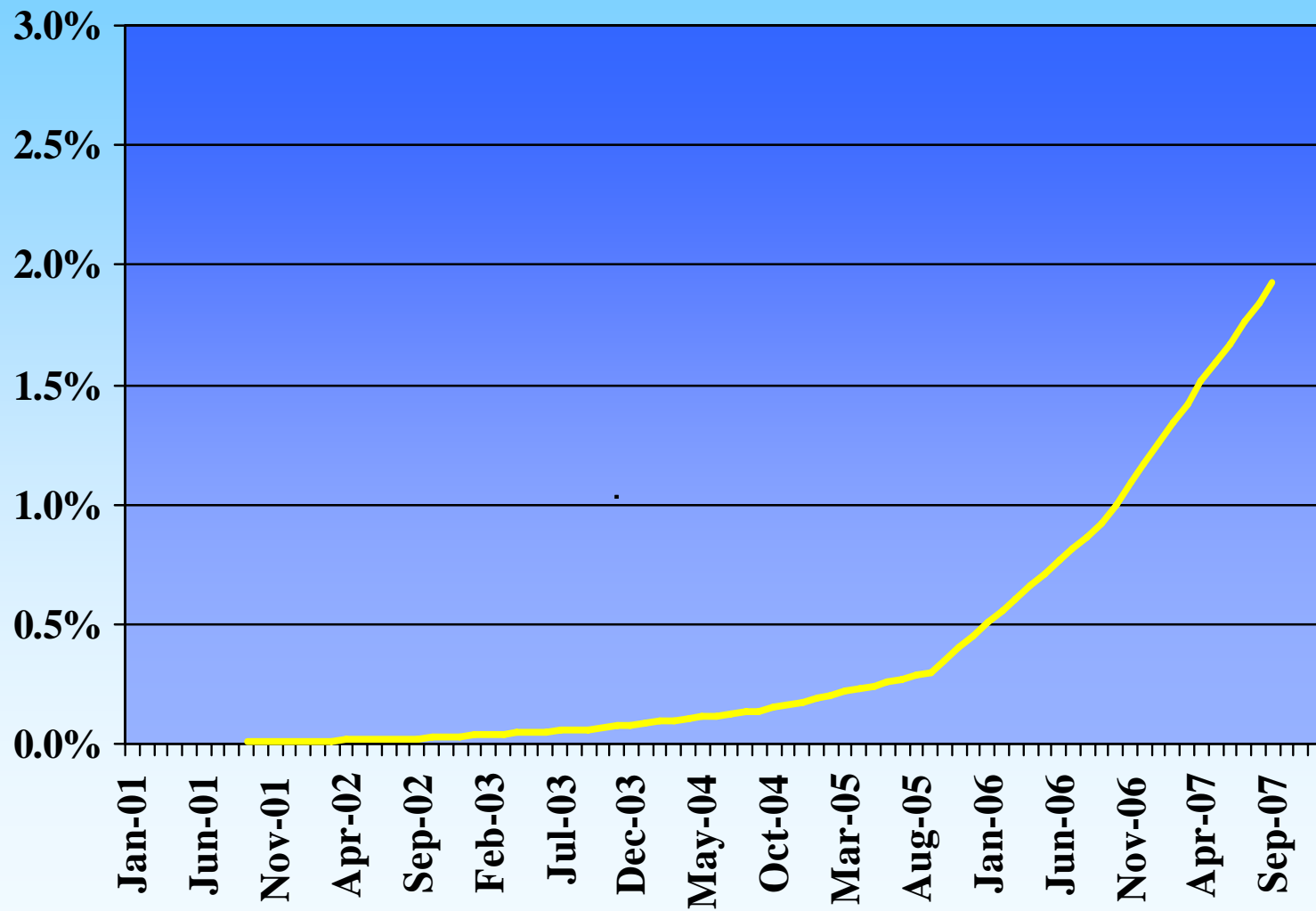
Data from household surveys taken between November 2006 and March 2007. Sources: European Commission, "E-Communications Household Survey," April 2007; RVA LLC Market Research and Consulting, "Fiber-to-the-Home: Advanced Broadband 2007" Vol. 1, June 2007.

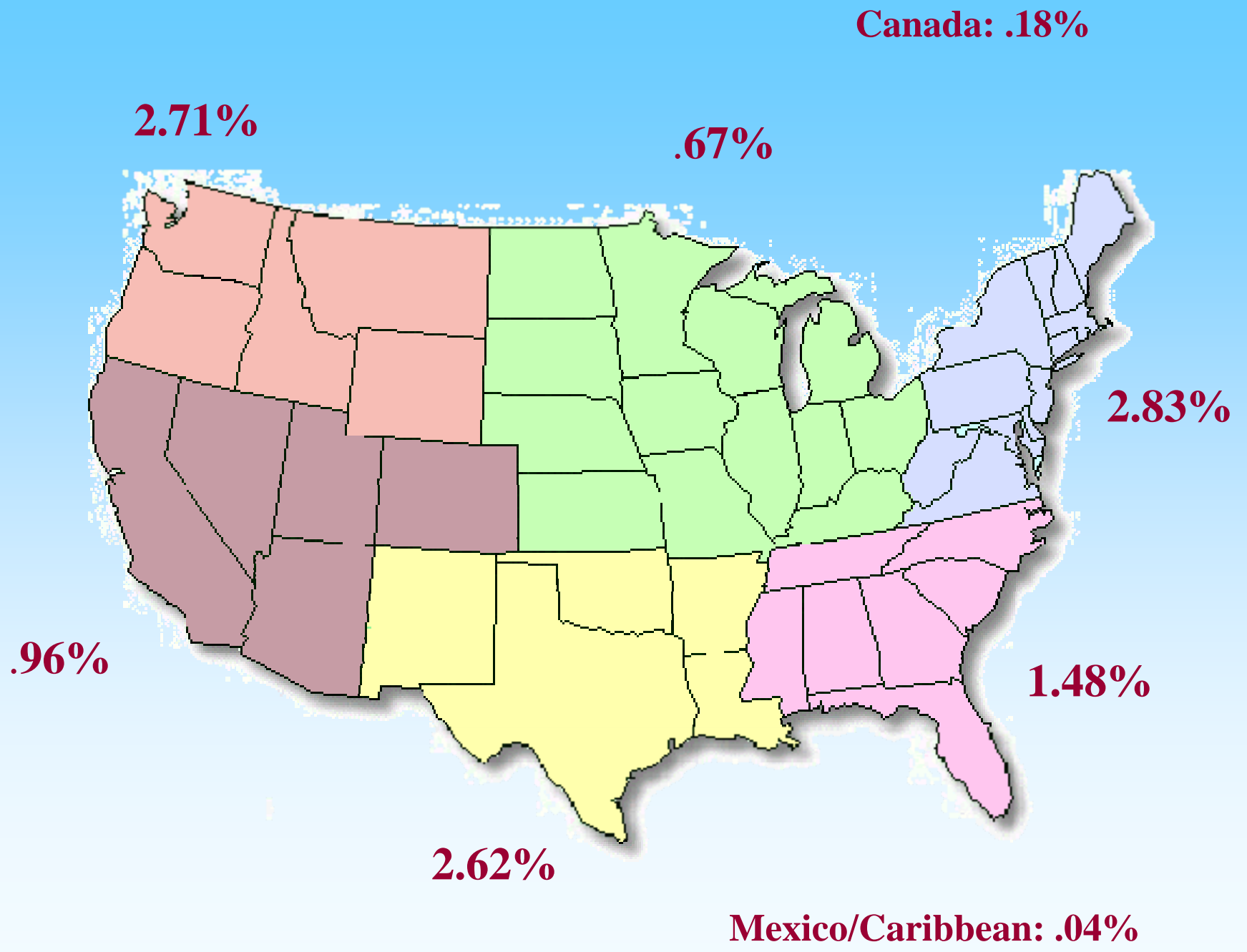
FTTH Penetration

Estimates of U.S. FTTH Household Penetration



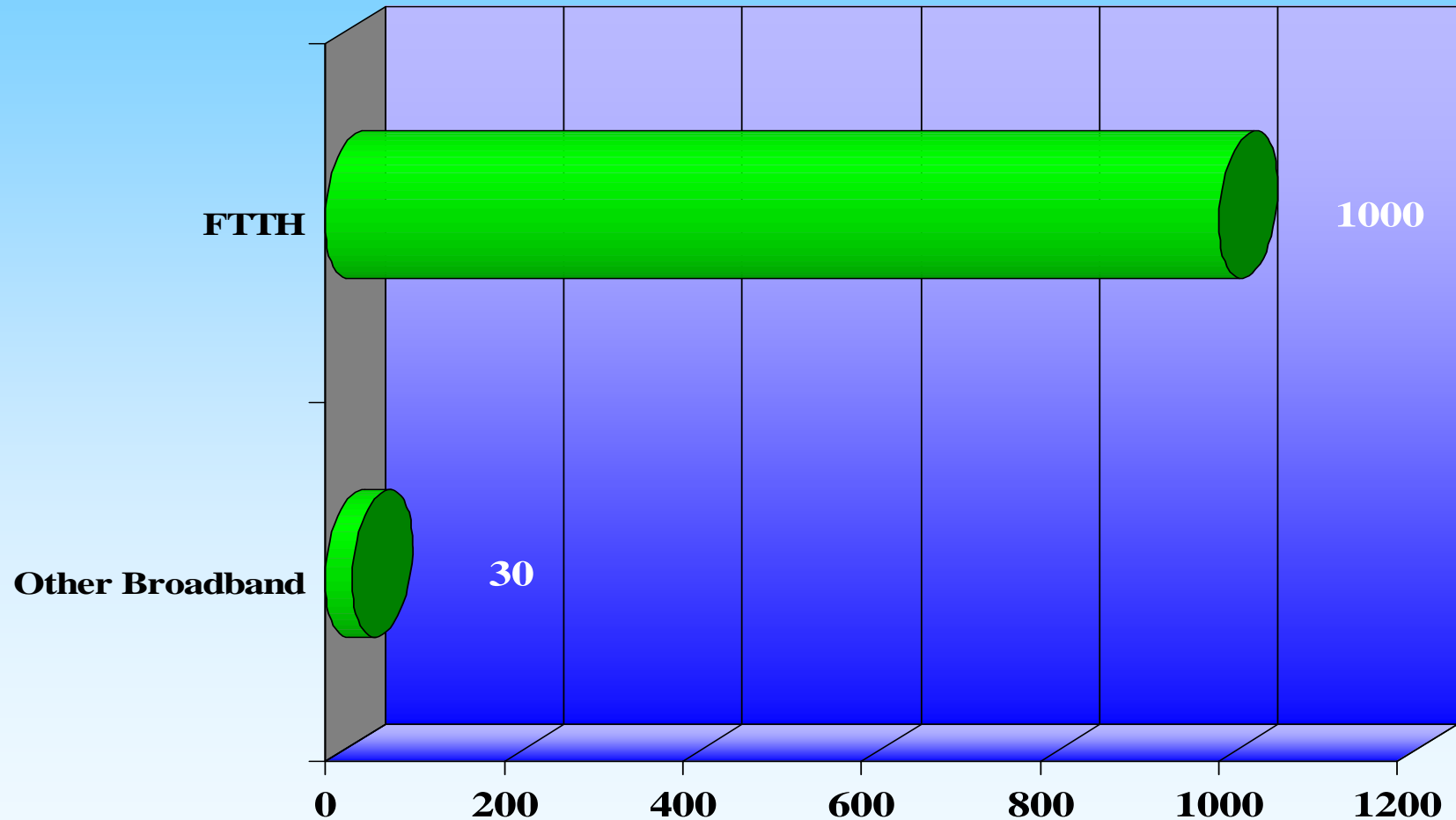
Estimates of U.S. FTTH Household Penetration





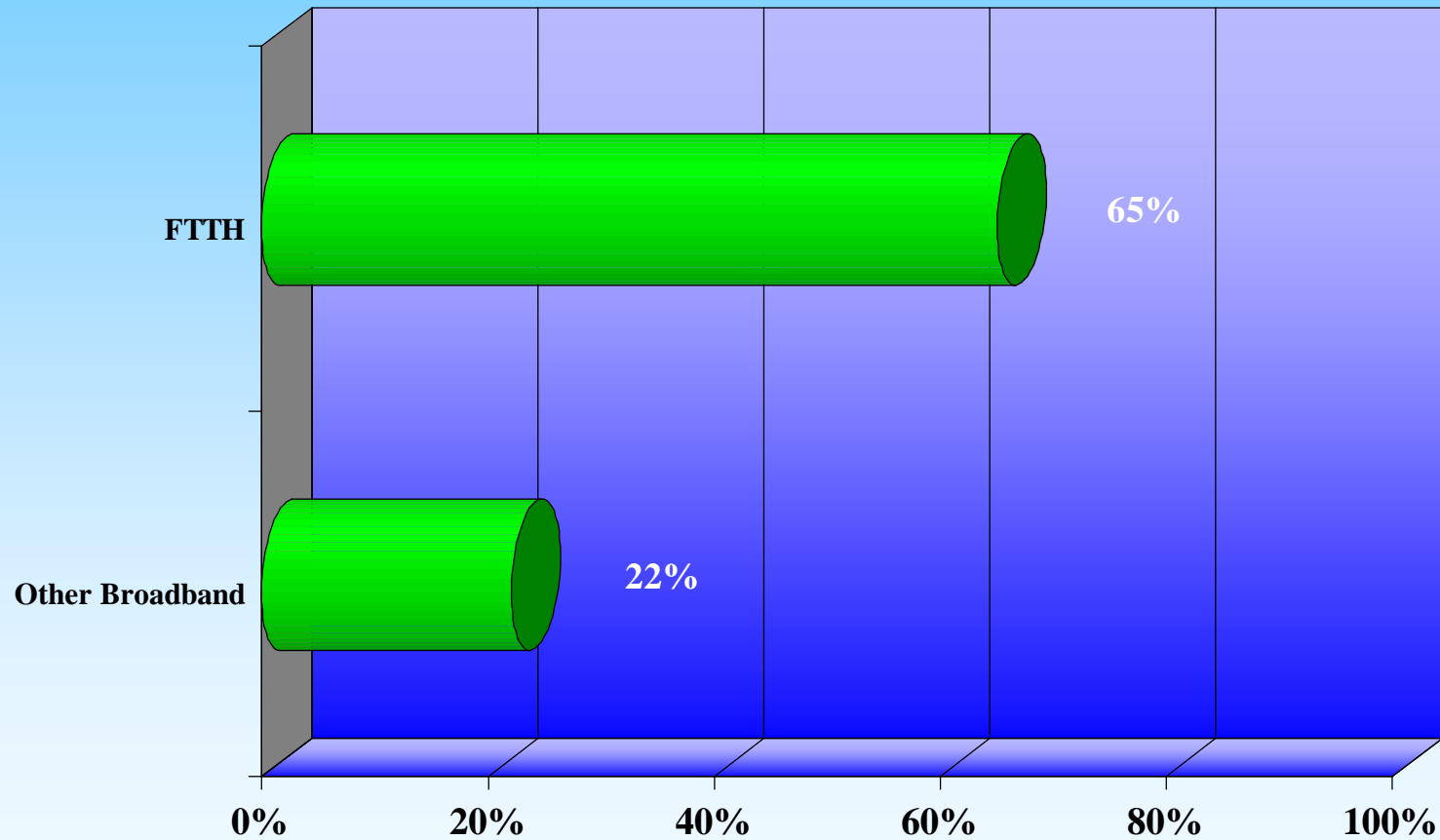
FTTH Performance

Maximum Known Stated Connection Speed (Mbps)



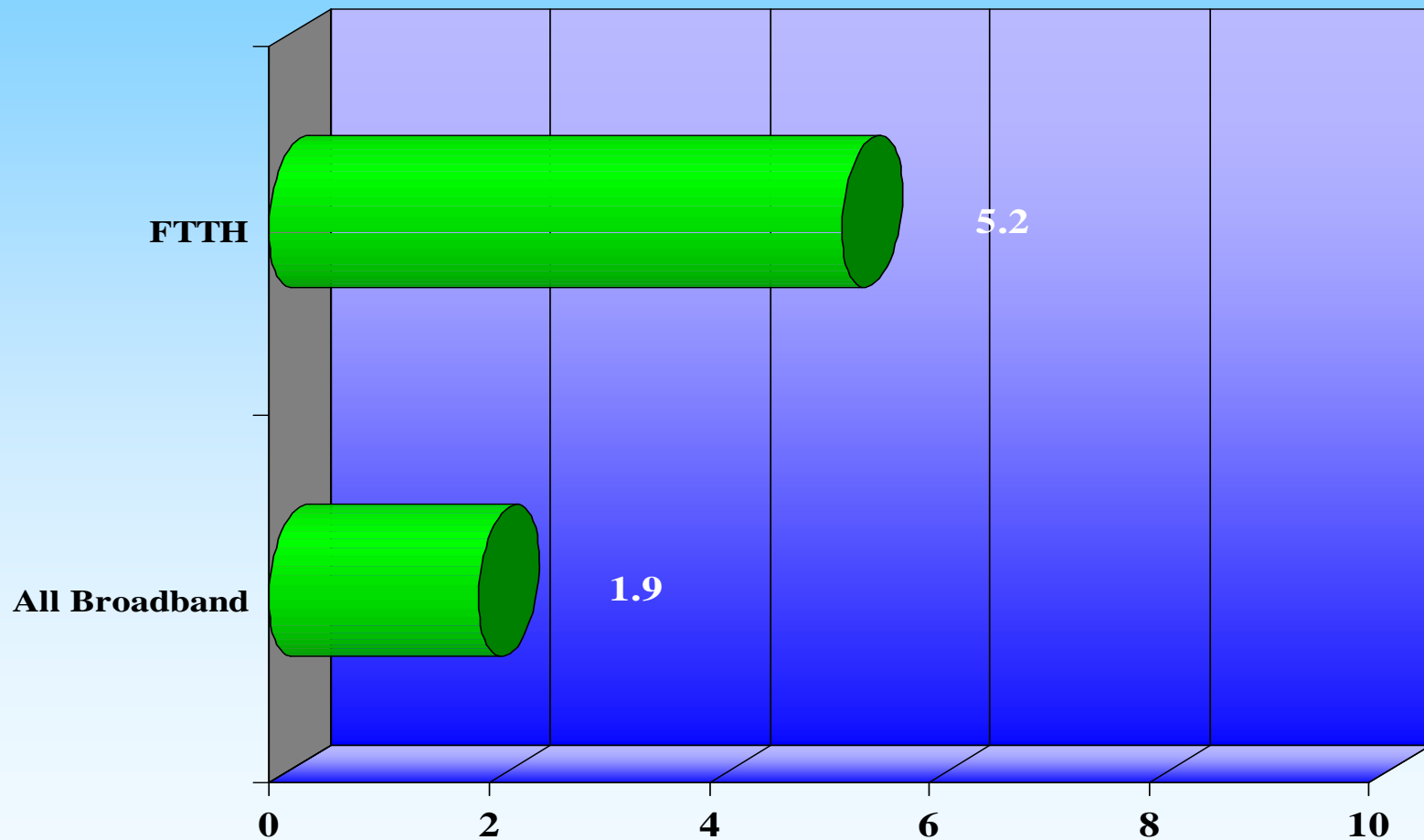
Source: RVA November 2007

Actual to Advertised Connection Rate



Source: RVA against industry data

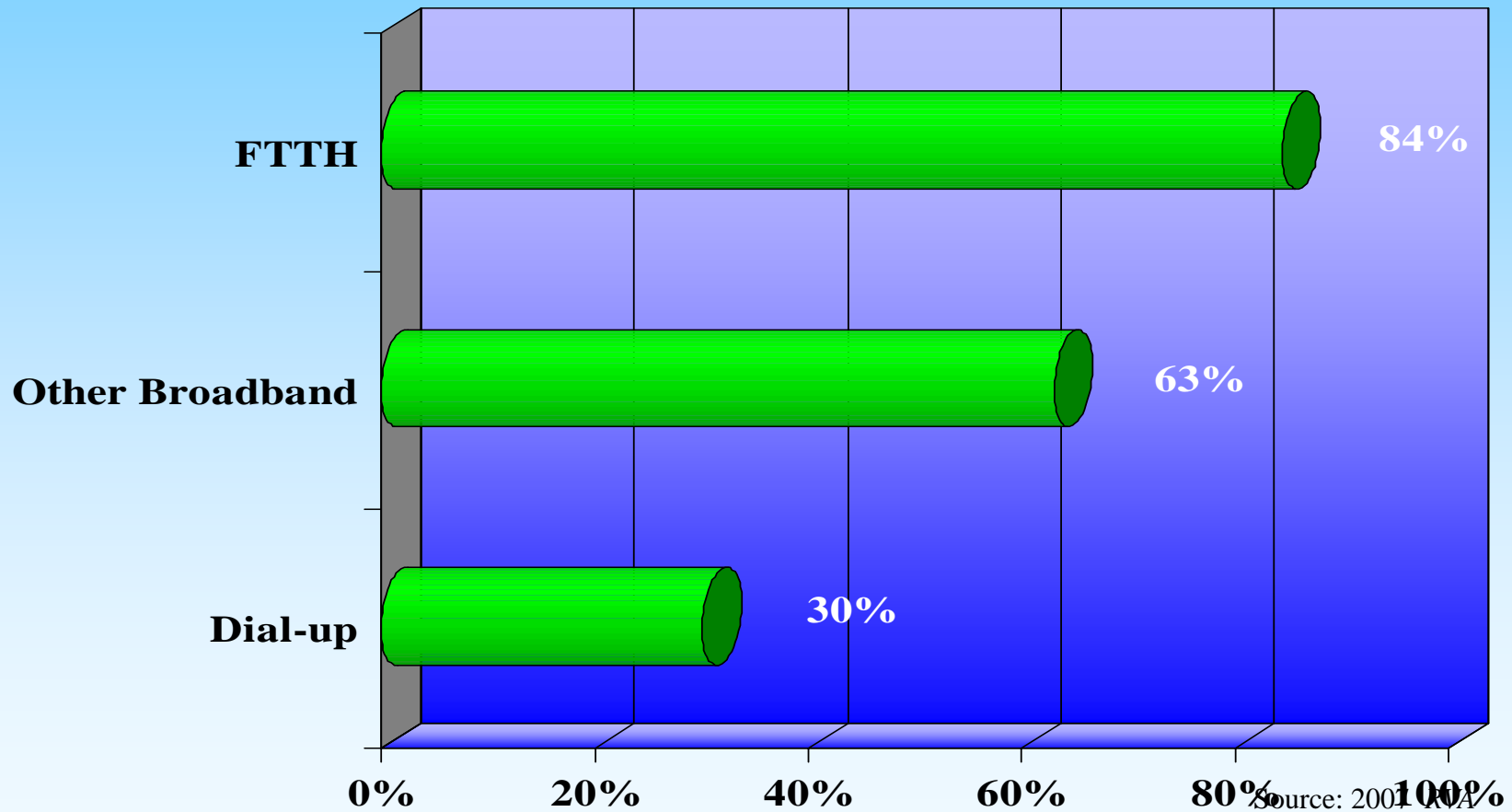
Median Tested Download Speeds (Mbps) Spring 2007



Source: RVA April 2007

Comparative Satisfaction With Internet

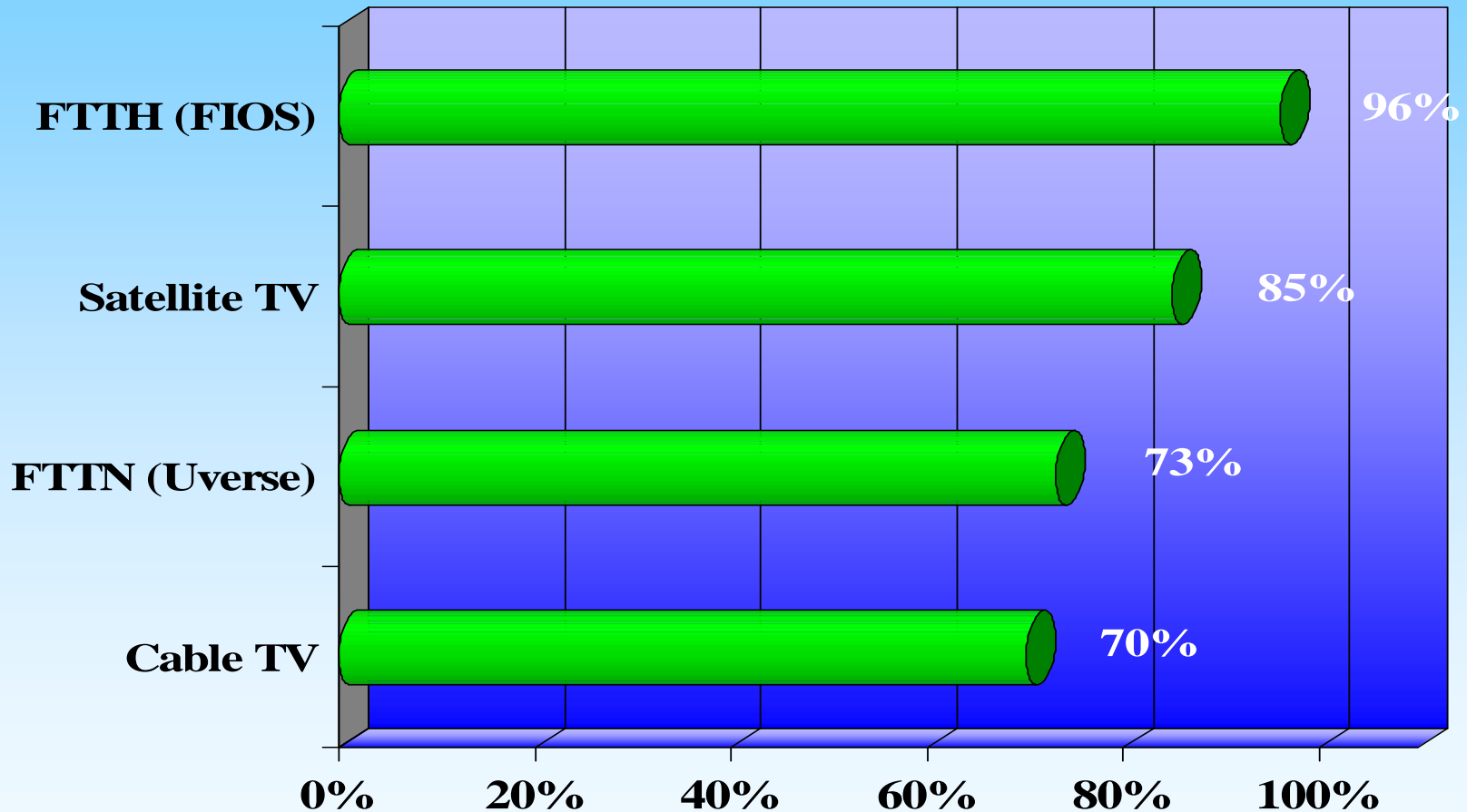
(Percent somewhat or Very satisfied)



Source: RVA April 2007

Comparative Satisfaction With TV Service

(Percent somewhat or Very satisfied)

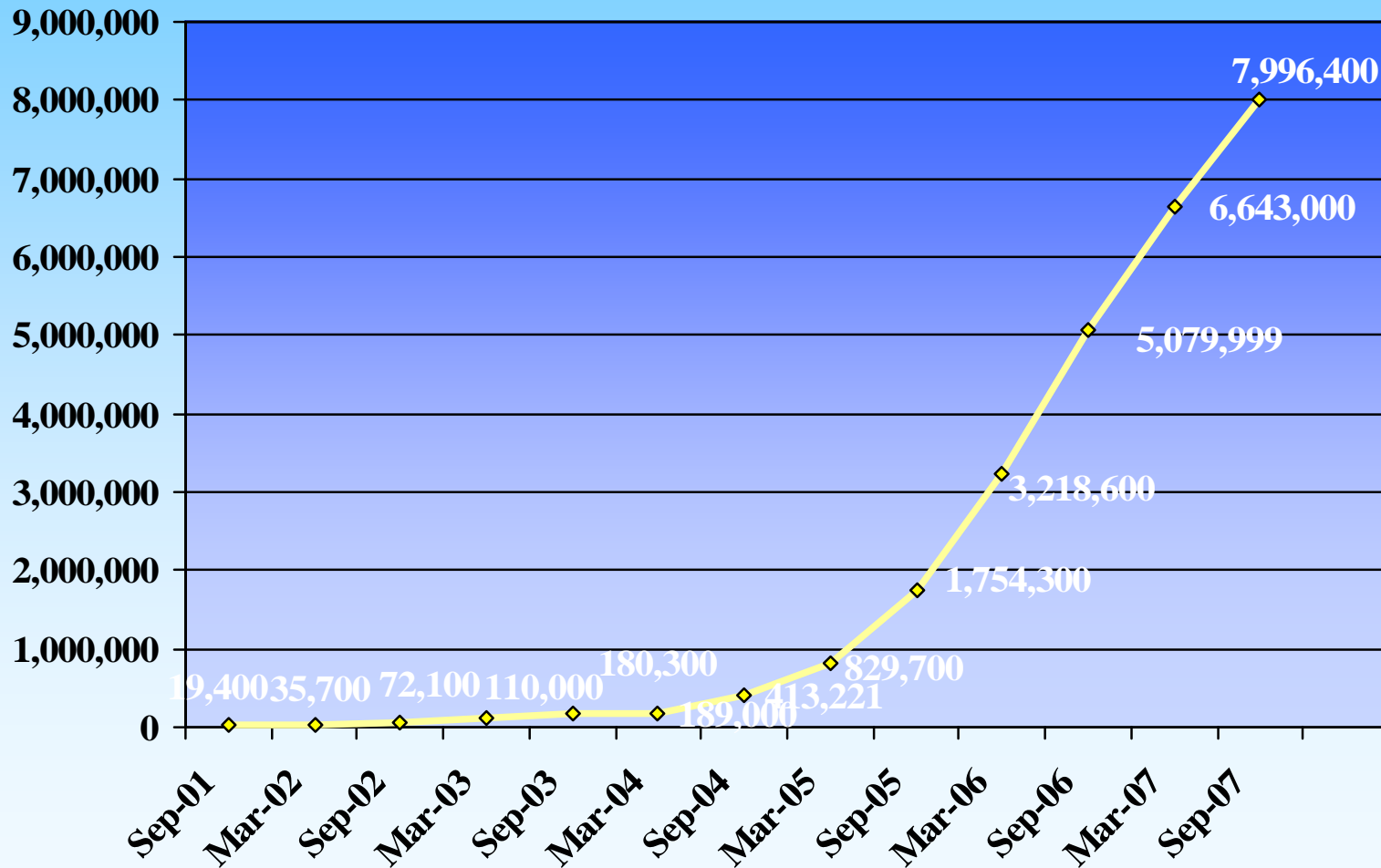


Source: Change Wave Research Sept 2007

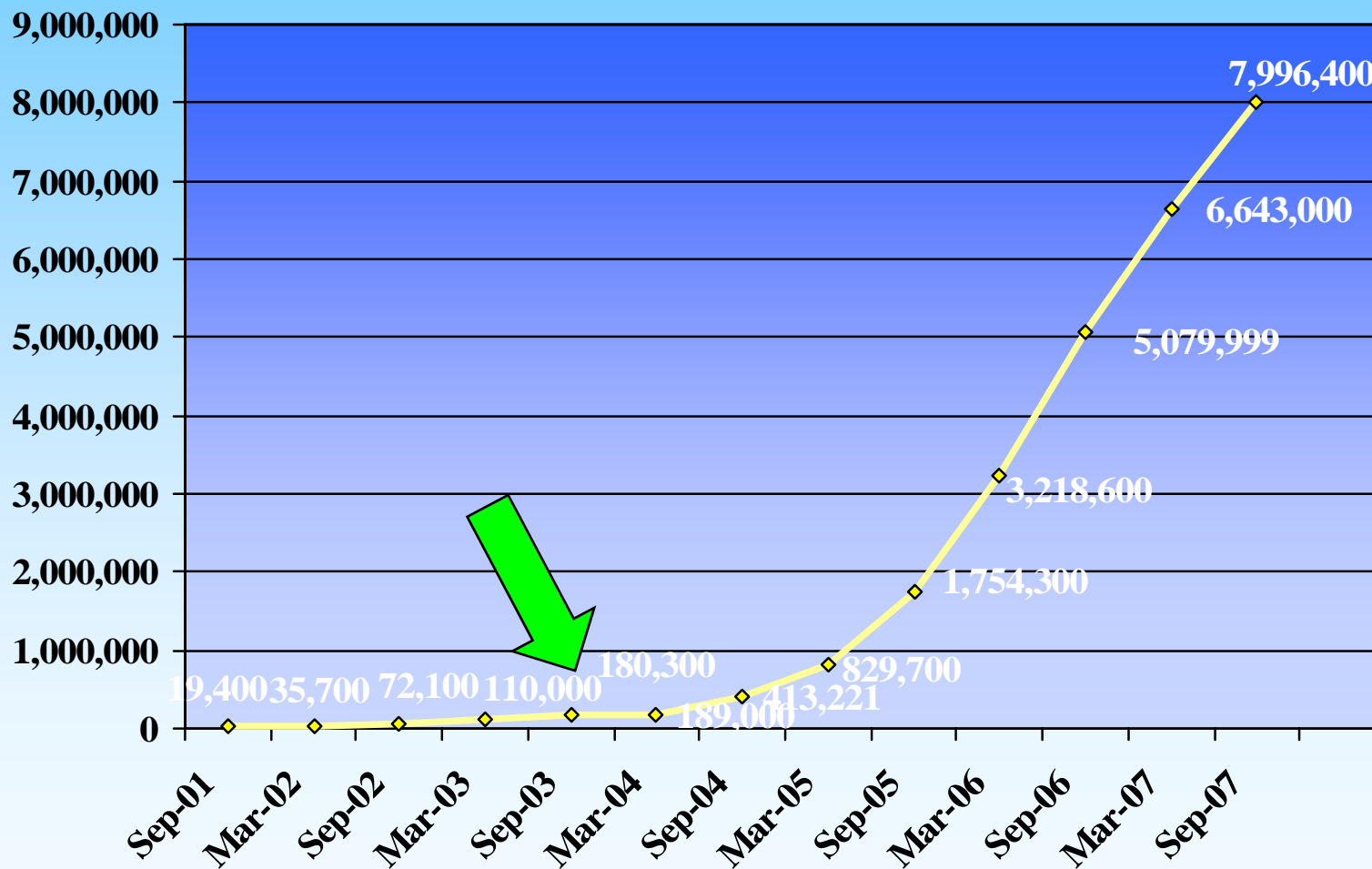
Policy Effects on FTTH

FTTH Homes Marketed

(Cumulative – North America)

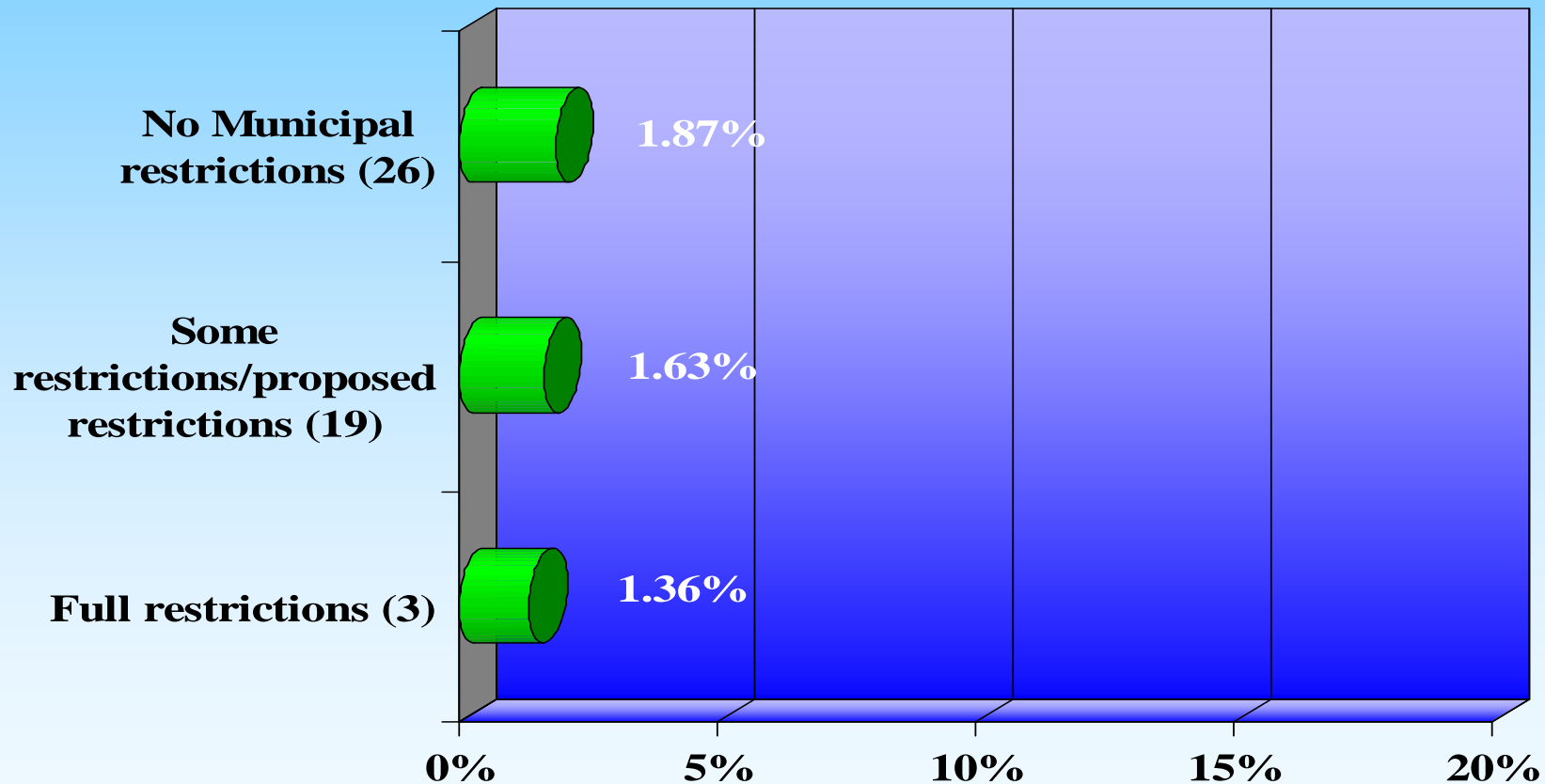


FTTH Homes Marketed (Cumulative – North America)



FTTH Penetration By Municipal Restriction

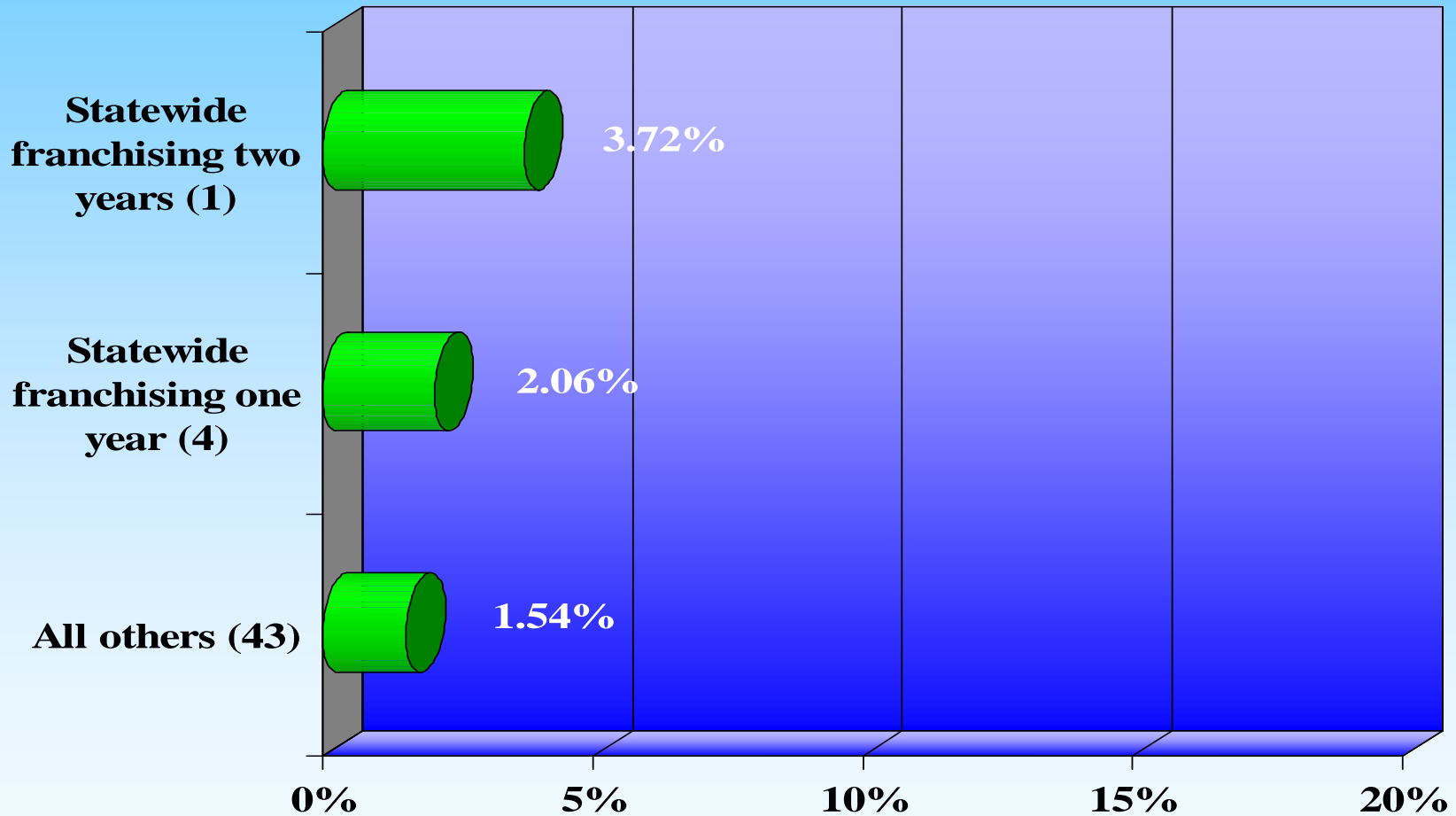
(Averages of States based on conditions)



Source: 2007 *RVA*

FTTH Penetration By Video Franchising

(Averages of States based on conditions)



Source: 2007 RVA

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