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# Top U.S. ISPs by Subscriber: Q1 2001

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## Top U.S. ISPs by Subscriber: New User Growth

We rank U.S. Consumer ISPs by overall subscriber numbers, regardless of connectivity method. Top performers might surprise you and non-standardized reporting structures might confound you, but the numbers don't lie.

Which U.S. service provider topped the charts for positive growth from the period ending Dec. 31, 2000 to March 31, 2001? Surprisingly, Prodigy Communications with 30 percent growth. Unfortunately the extraordinary accomplishment was not due to real growth in new users. SBC Communications rolled its numbers into the Prodigy brand name as part of a collaborative deal. Because we can not separate Prodigy users from SBC access, the growth factor obscures real performance. Does this mean that the exulted leader of the pack goes to MSN with 20 percent comparable subscriber base growth? Sorry, you would be wrong to leap to that conclusion. MSN does not play fairly when it comes to public reporting structures. Astonished? Microsoft's Internet access unit only reports "milestones," which do not qualify as factual quarterly data. We must statistically disqualify MSN from our top performance analysis.

+ / - Change	ISP	2001 Q1 Subs. (millions)	2001 Subs. (millions)
+ 17%	AOL Time Warner	18.9*	17.5*
+ 4%	EarthLink	4.8	4.6
+ 10%	Juno Online	4.1 (15.9m total±)	4.0 (14.2m total±)
+ 2%	NetZero	3.7 (8.6m total±)	3.5 (7.0m total±)
+ 20%	MSN Internet	5.0	4.0
+ 13%	Excite@Home	3.2	2.9
- 41%	BlueLight.com	1.9* (6.6m total±)	2.8* (5.5m total±)
+ 7%	CompuServe (AOL)	3.0	2.8
- 30%	Prodigy (Includes SBC Inc.)	3.1	2.17
No Change	Gateway.net (AOL)	1.7	1.7
No Change	AT&T WorldNet	1.3	1.3
No Change	WebTV	1.1	1.1
+ 16%	Road Runner	1.2	1.0
No Change	Bell South	.655	.655
- 2%	All other U.S. ISPs Combined	est. <sup>2</sup> 11.5	est. <sup>2</sup> 11.3

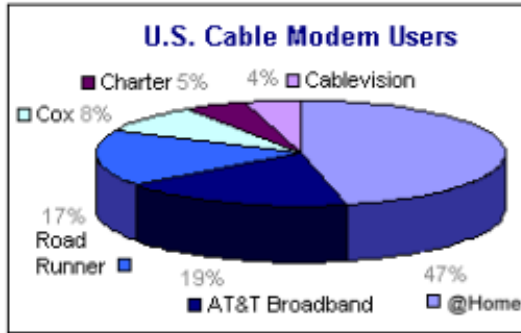
Is America Online the *de facto* winner in Q1 user growth with 17 percent gained? Nope. AOL's subscriber base figure must be estimated as a regional average, because it only reports a worldwide subscriber figure each quarter. We must

subtract its CompuServe and Gateway.net brands and also eliminate its European users, which means that we lop about 35 percent of AOL's total subscriber base off its top number, in order to estimate AOL's U.S. users.

### **Top of the heap**

Finally, we're getting down to the "brass tacks" of statistically accountable analysis, and our first prize winner in new user growth for Q1 2001 is—Juno Online Services.

Juno's 10 percent growth factor is based on actual data and reflects the correct time frame of our analysis. Second place goes to AOL-owned CompuServe with 7 percent growth, while third place goes to EarthLink with 4 percent. "All other" ISPs round out the top four new user growth factor in our Q1 2001 analysis. If your independent ISP serves less than 300,000 users and you grew your subscriber base by 2 percent, your ISP operation produced average growth for the first 90-days of this year.



In terms of cable modem access, Excite@Home only reports a global figure. Without a U.S. breakout unavailable, AOL-owned Road Runner cable access is our statistically acceptable champion of new users growth in the U.S. for the first quarter of 2001. This is the first time that rival cable access providers AT&T Broadband, Cox Communications, Charter Communications and Cablevision provided comparable data user figures, so their growth factors could not be tabulated in our Q1 report.

- \* AOL Time Warner U.S. Subscriber figures reflect the ISPs reported worldwide customer counts, less international subscribers, less CompuServe subscribers, and less Gateway.net subscribers.

Free ISP subscriber ranking based on users actually long on each month as "active users" as opposed to the total number reported by the ISP as "registered users." Juno Online, BlueLight.com and NetZero report actual active user figures on a monthly basis.

- 2 U.S. Online population total and market share figures based on information from the Computer Industry Almanac, quoted in [CyberAtlas](#) US Online Population: 68,481,217