

Innovative Systems 2025 Rural Broadband Subscriber Study

Report of Findings



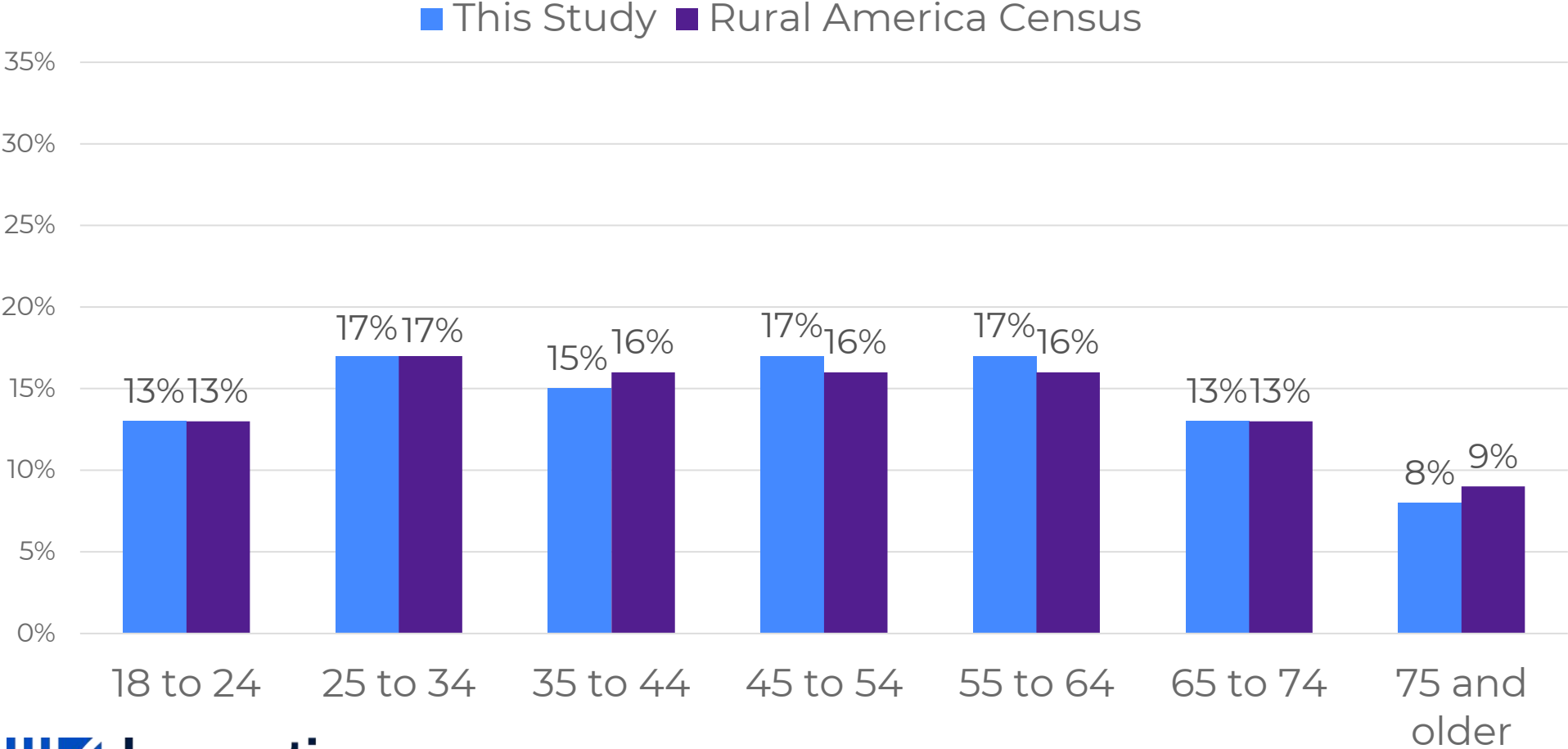
1. These findings are based on online surveys completed January 16-23, 2025.
2. Primary objectives are to understand satisfaction and usage trends of rural broadband and video consumers.
3. In total, 835 rural US residents participated (MoE +/- 3.4%). A leading research panel company provided the sample.
4. The survey instrument was developed by Pivot in collaboration with Innovative Systems.



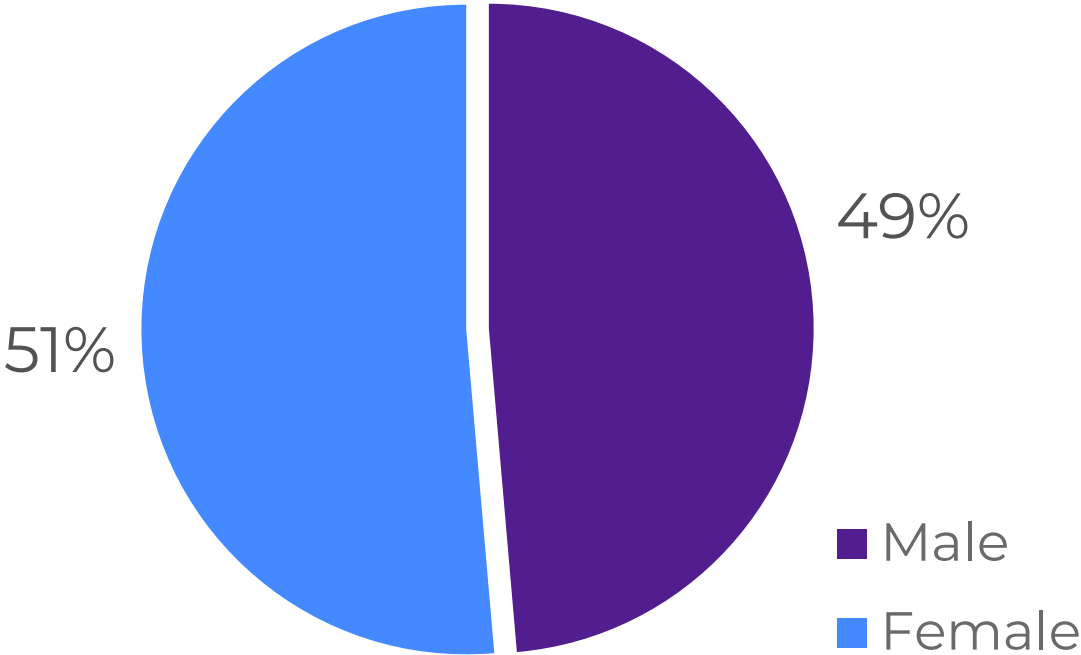
When you see an orange or grey arrow in a chart next to a number, it means the number is, statistically speaking, significantly different (higher or lower) than one or more corresponding numbers in the same chart.

“Significantly different” means it passes the industry standard statistical difference test at the 95% confidence level. Meaning, if this study were repeated with a separate random sample of respondents, we would expect the numbers to be similarly higher or lower 95 times out of 100.

Age Group – Compared to Rural America



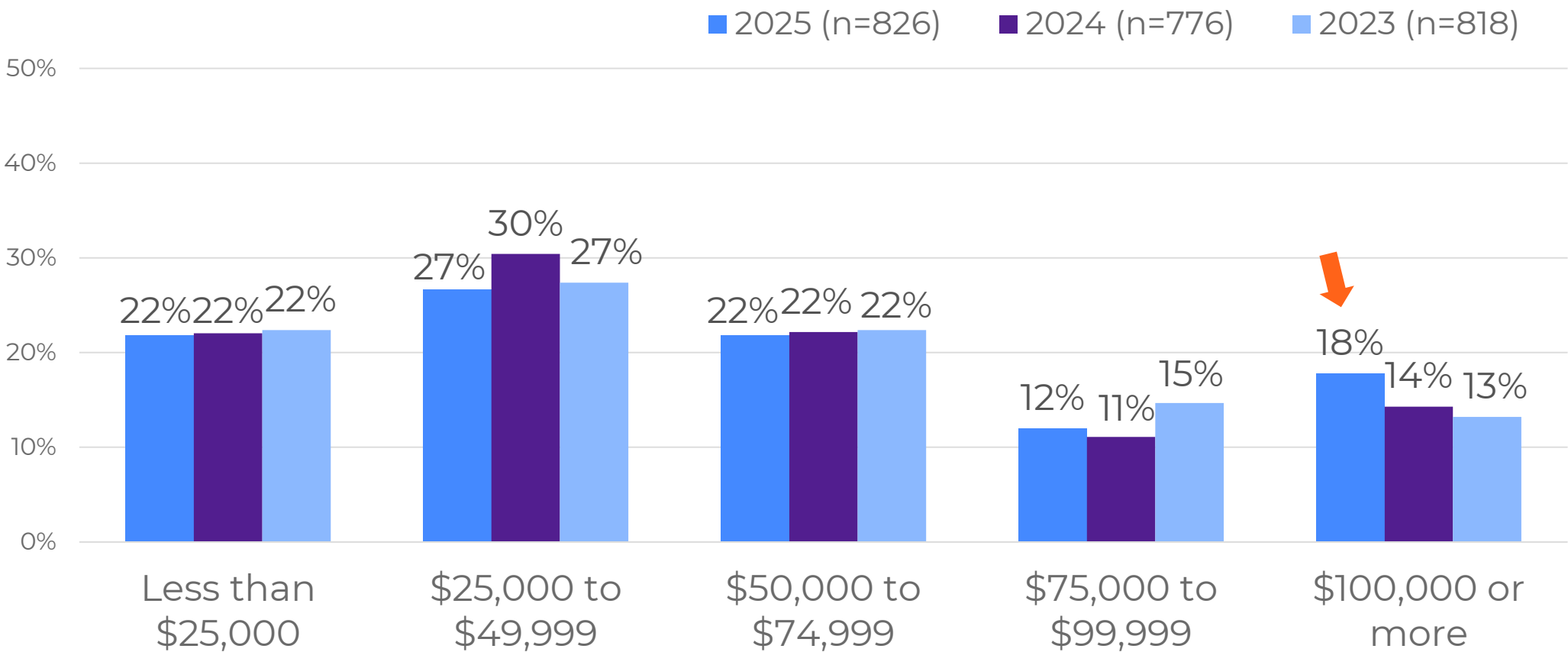
Gender



**2024 Study:
51% Female
49% Male**

Annual Household Income

Q42. Which of the following best describes your annual household income?

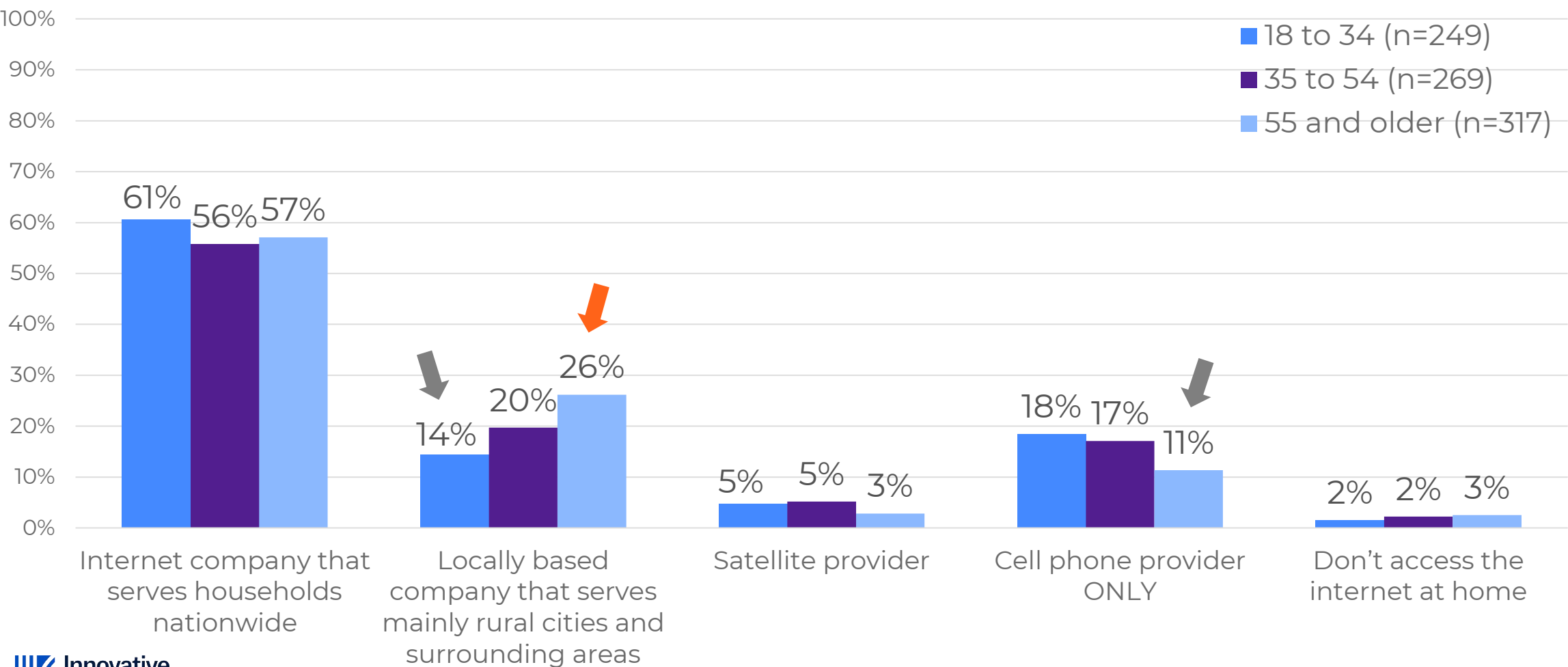


Broadband Internet Service



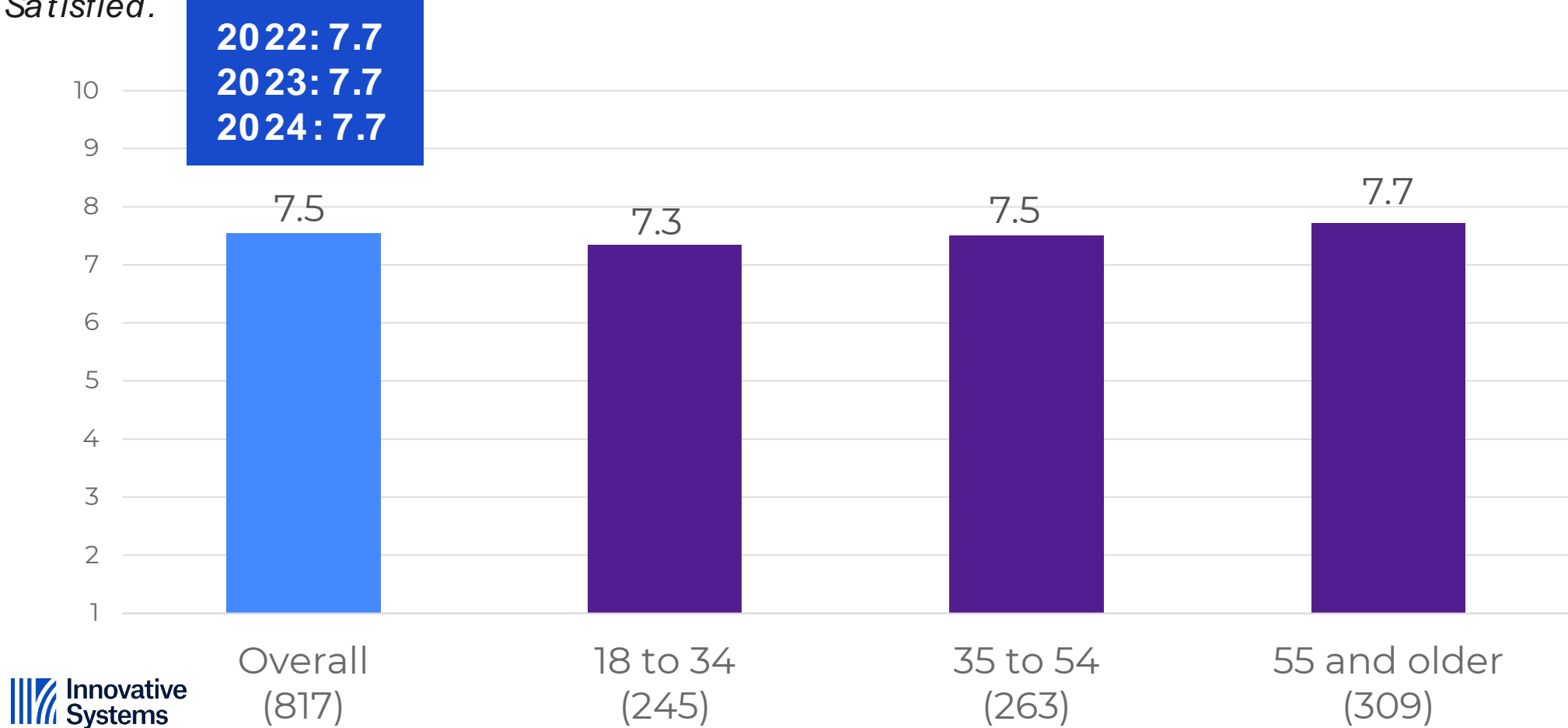
Internet Service Provider Type – by Age Group

Q5. Which one of the following describes your home internet service provider?



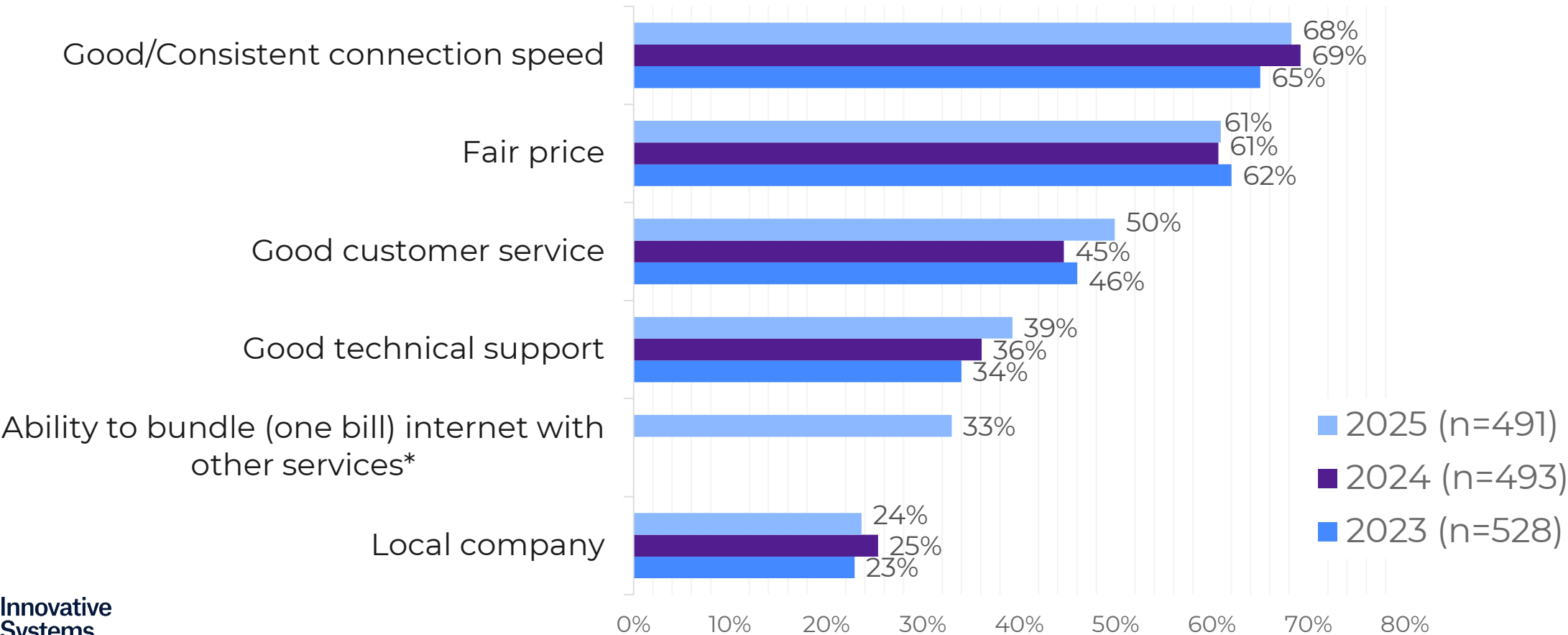
Satisfaction with Internet Provider

Q6A. How would you rate your overall satisfaction with your home internet service provider? *Shown are mean scores based on a 1 to 10 scale where 1 equals Completely Dissatisfied, and 10 equals Completely Satisfied.*



Drivers of High Internet Satisfaction

Q6B. What has the greatest influence on your satisfaction? *Check all that apply*
(Asked of those who gave a rating of 8, 9, or 10 on Internet Satisfaction.)



*New wording in 2025

Reasons for High Ratings



“With the colder weather, they emailed, texted, and called me to see if everything was okay, and if we had internet access and heat.”

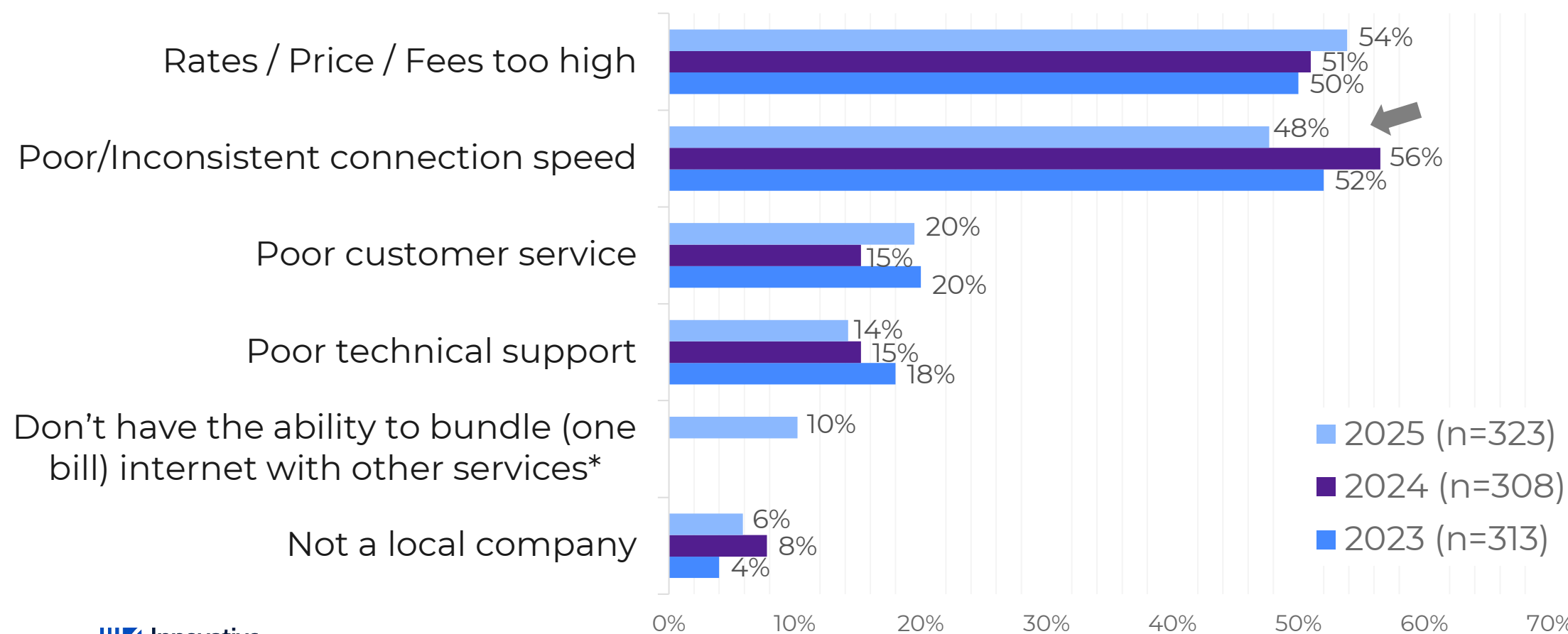
“Bundle everything together makes it easy for us.”

“They provide proactive maintenance on my system.”



Drivers of Low Internet Satisfaction

Q6C. What keeps you from giving a higher rating? *Check all that apply*
(Asked of those who gave a rating of 7 or lower on Internet Satisfaction.)



*New wording in 2025

Reasons for Low Ratings



“They started off well, but have fallen off in the years since.”

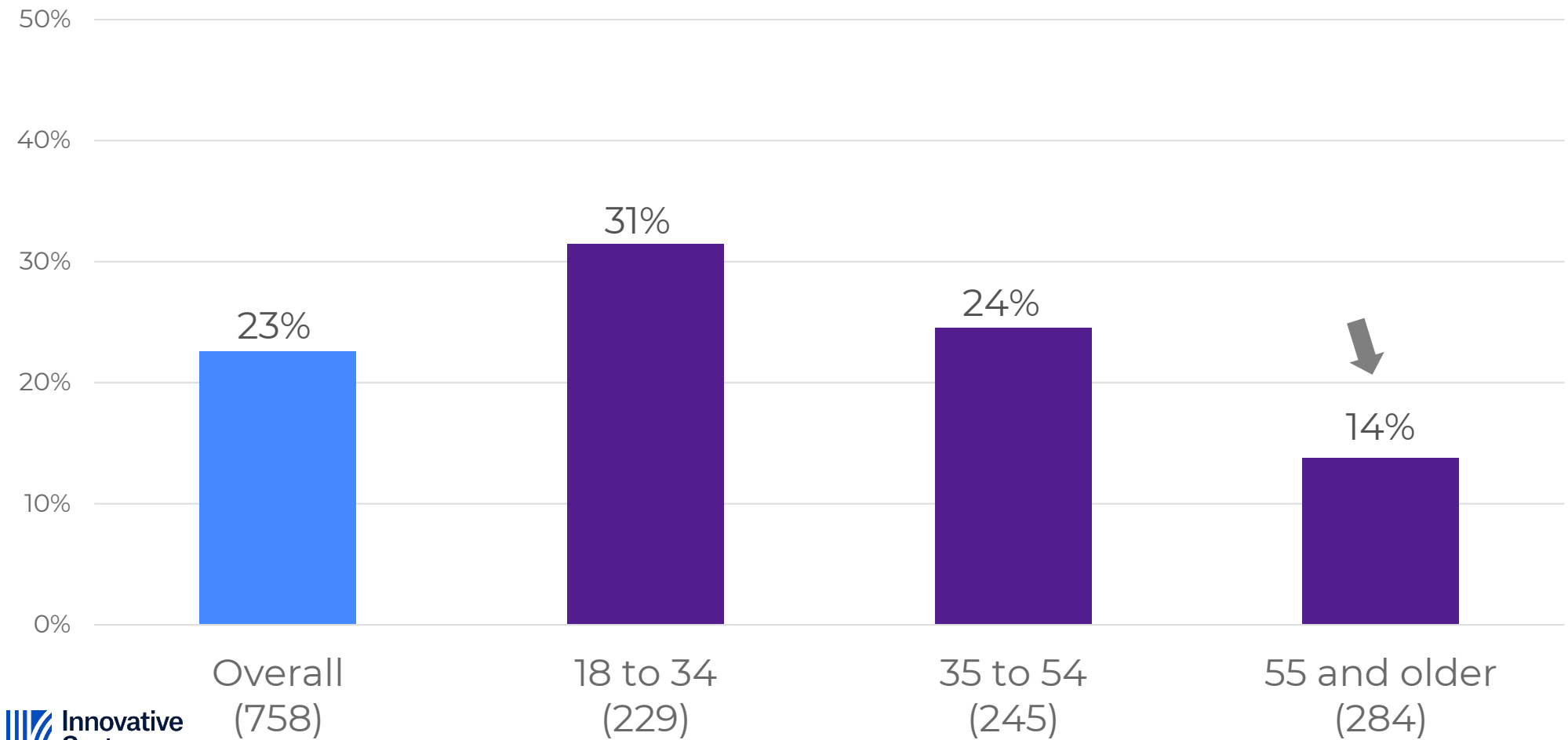
“They are the only company currently offered in our area or I would use another company.”

“They haven't done anything exceptional. They stink.”

askpivot.com

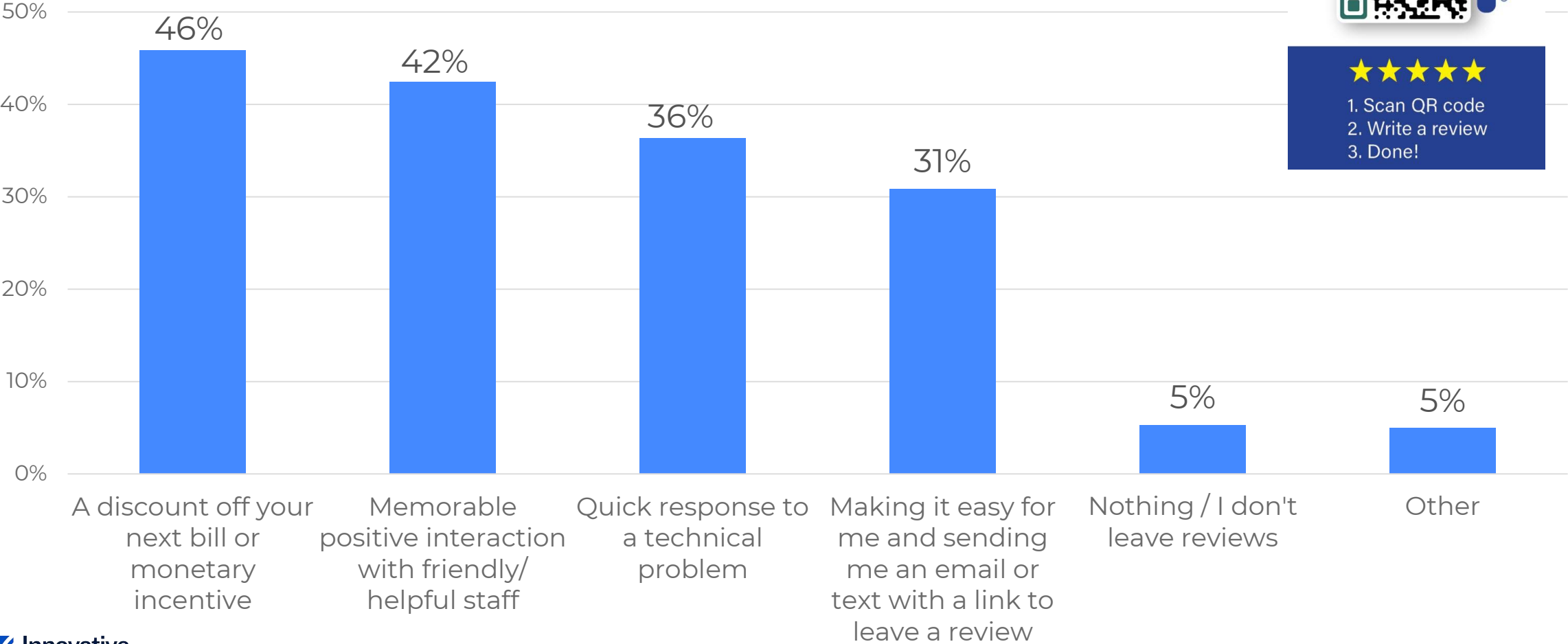
Left Provider Reviews

Q7. Have you ever left a review about your internet provider online or on social media (whether it was positive, negative or neutral)? *Shown is the percentage of respondents answering “yes.”*



What Would Prompt a Positive Review?

Q11. What would prompt you to leave a positive review? (n=810) *Check all that apply.*



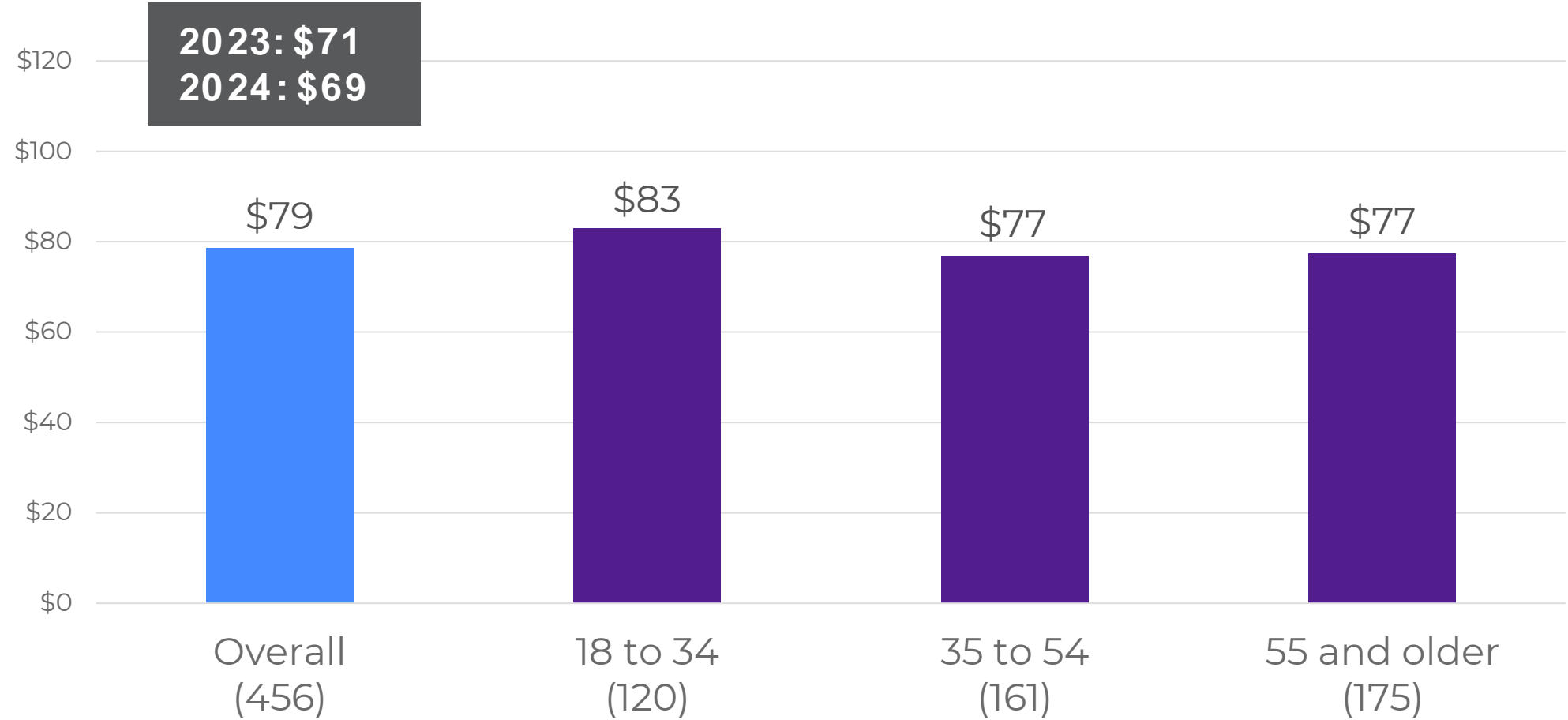
Please take a minute and leave us a review on Google!



- 1. Scan QR code
- 2. Write a review
- 3. Done!

Average Current Spend on Internet

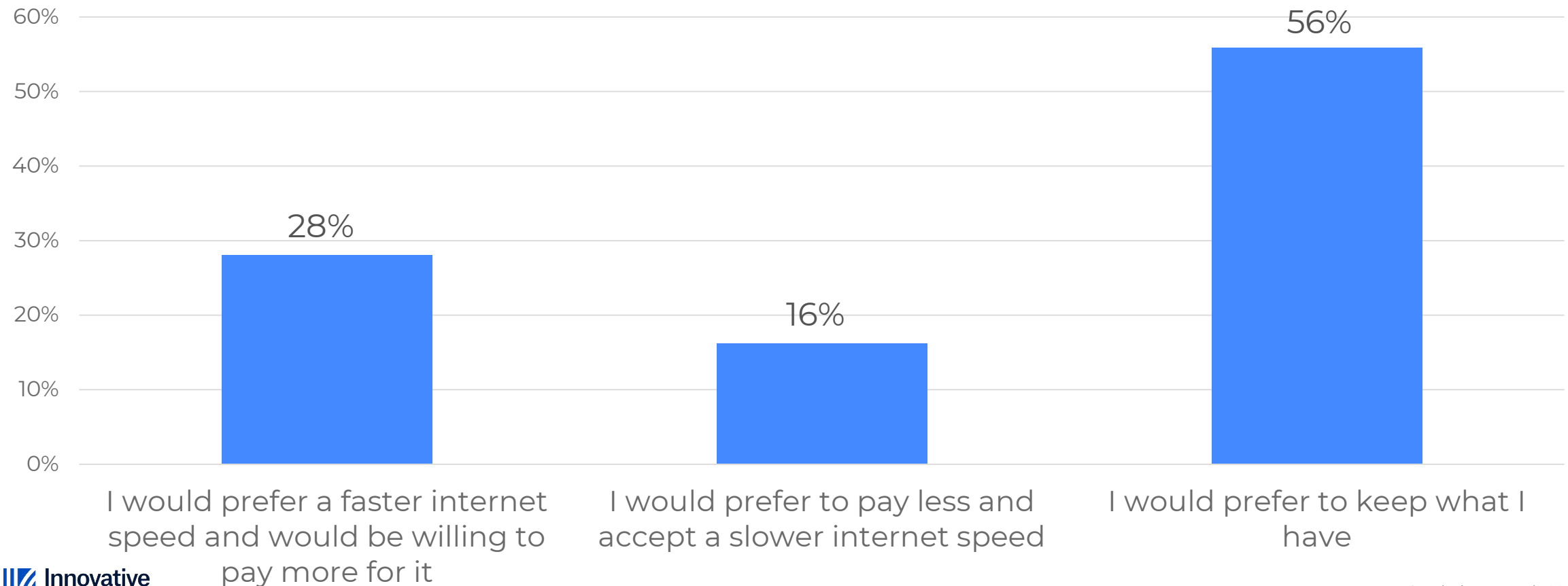
Q14. What is the approximate amount you're paying per month for your internet service? (Asked of those who do NOT subscribe to TV service from their internet service provider; n=456)



Preference for Faster Speed or Lower Price



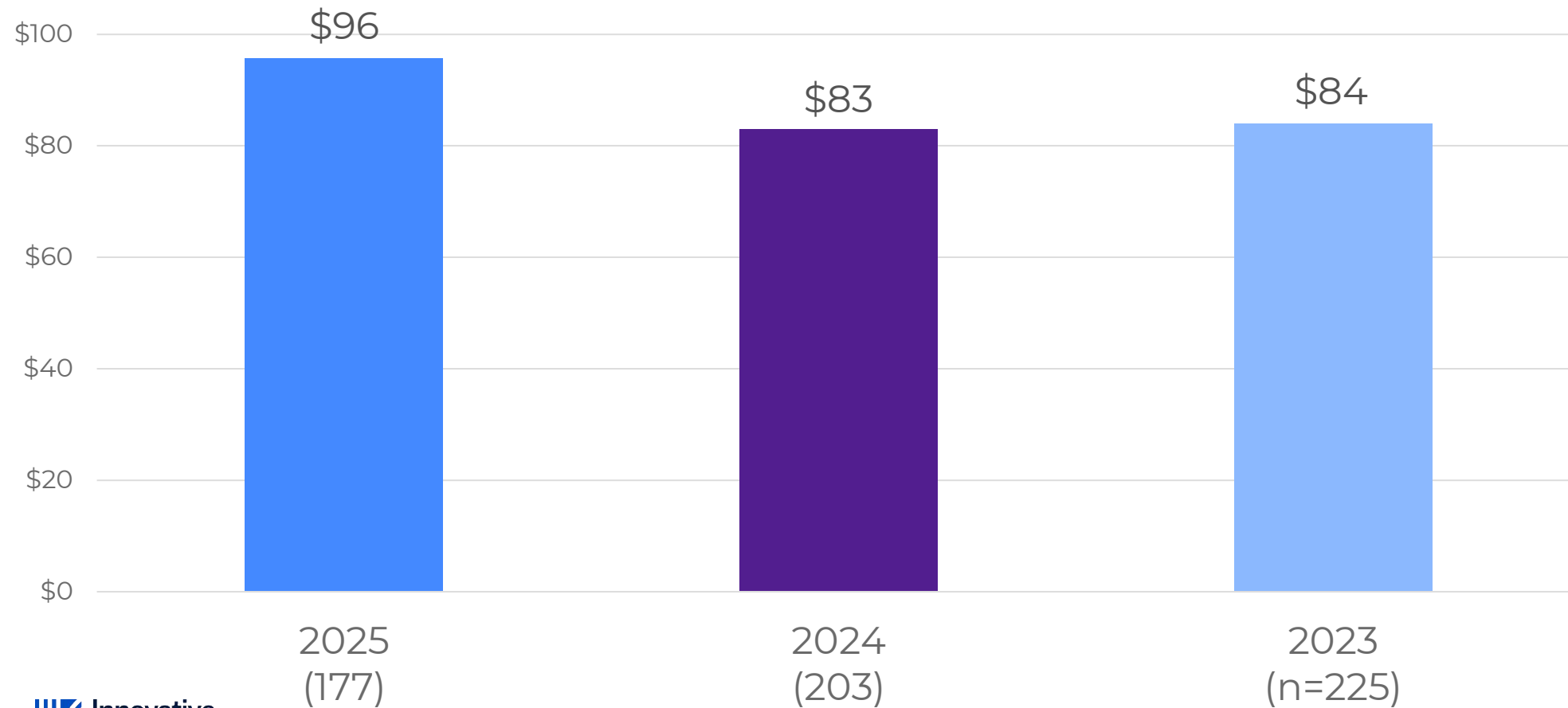
Q15. Compared to what you're paying for internet now, which of the following would you prefer for your household? (n=768)



Amount Willing to Spend for Faster Internet

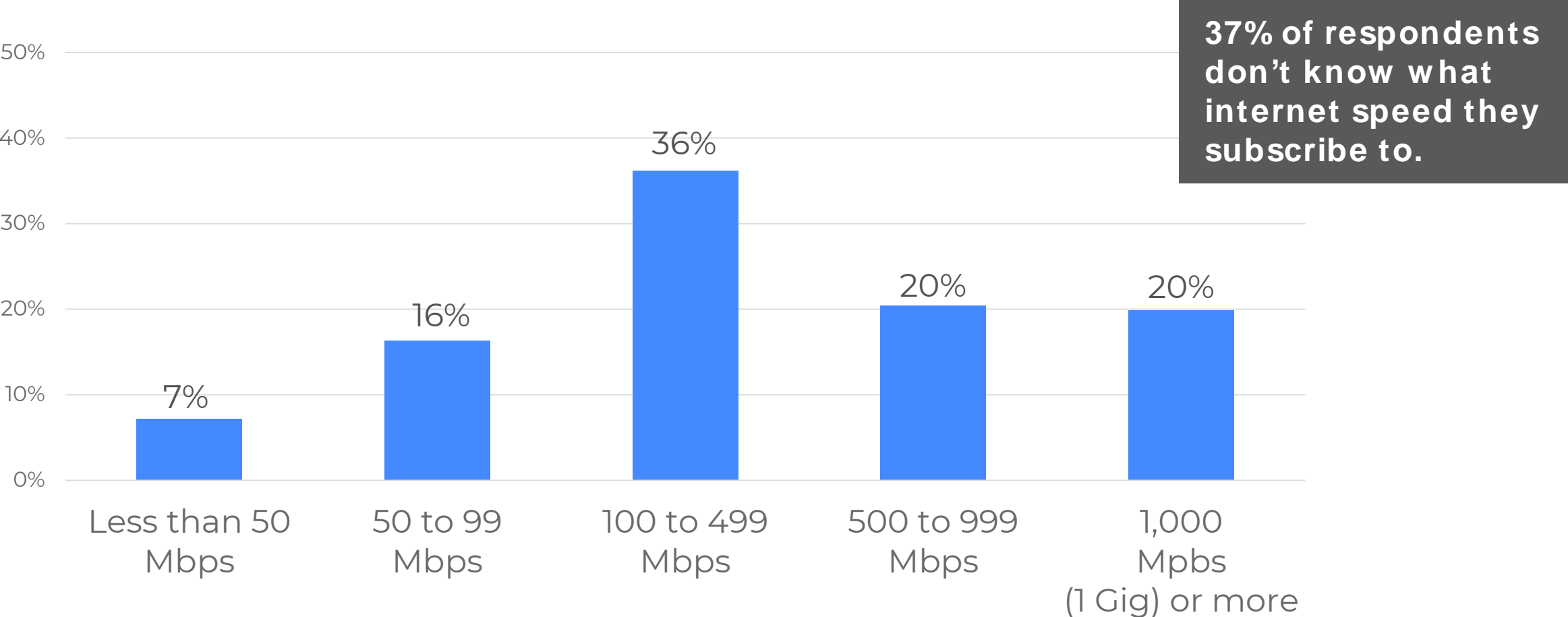


Q16. How much are you willing to pay per month (in total) for internet service that is faster than you're getting now? (asked of those willing to pay more for faster speed; n=177)



Internet Speed Tier Subscribed To

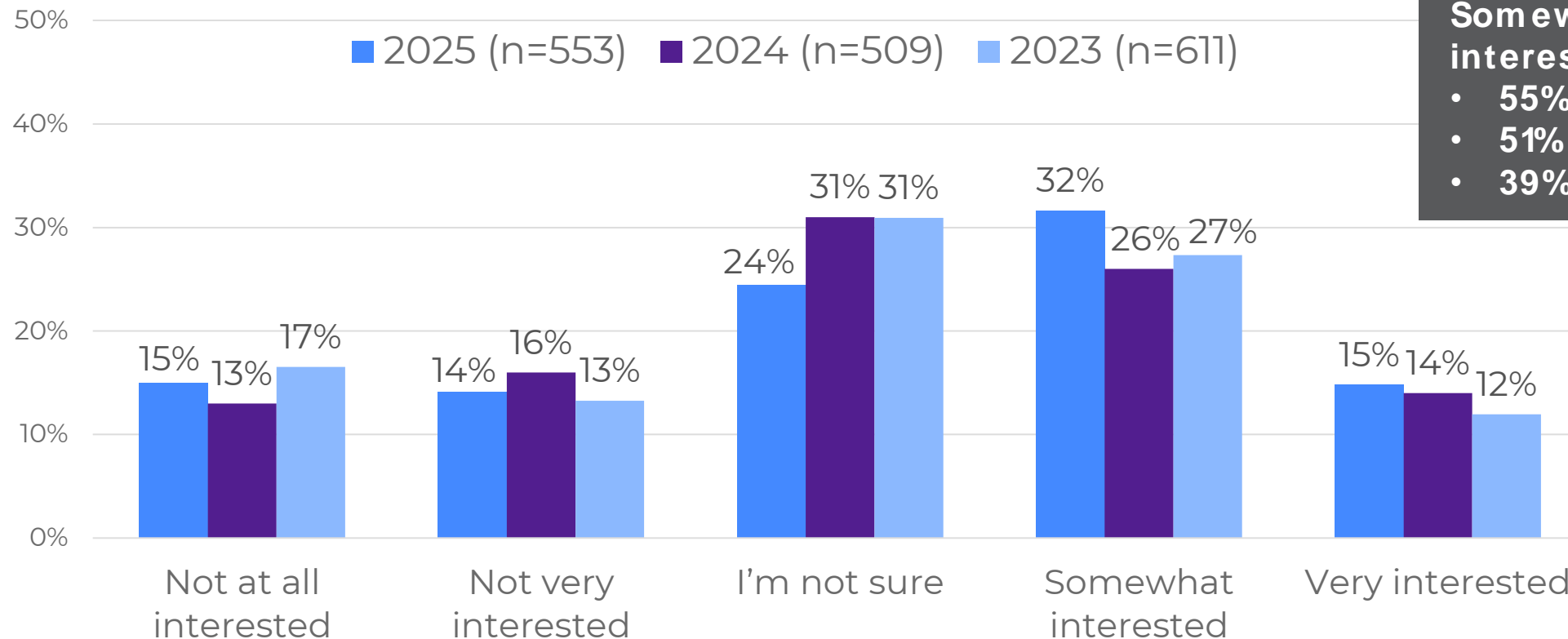
Q17. What internet speed tier (download speed) do you subscribe to? (n=514)





Interest in a Free Trial

Q18. How interested would you be in a free trial of a faster internet speed for one month to see how it impacts your online experience? (base includes only those who would not be willing to pay more for faster internet speed)



Somewhat + very interested by age:

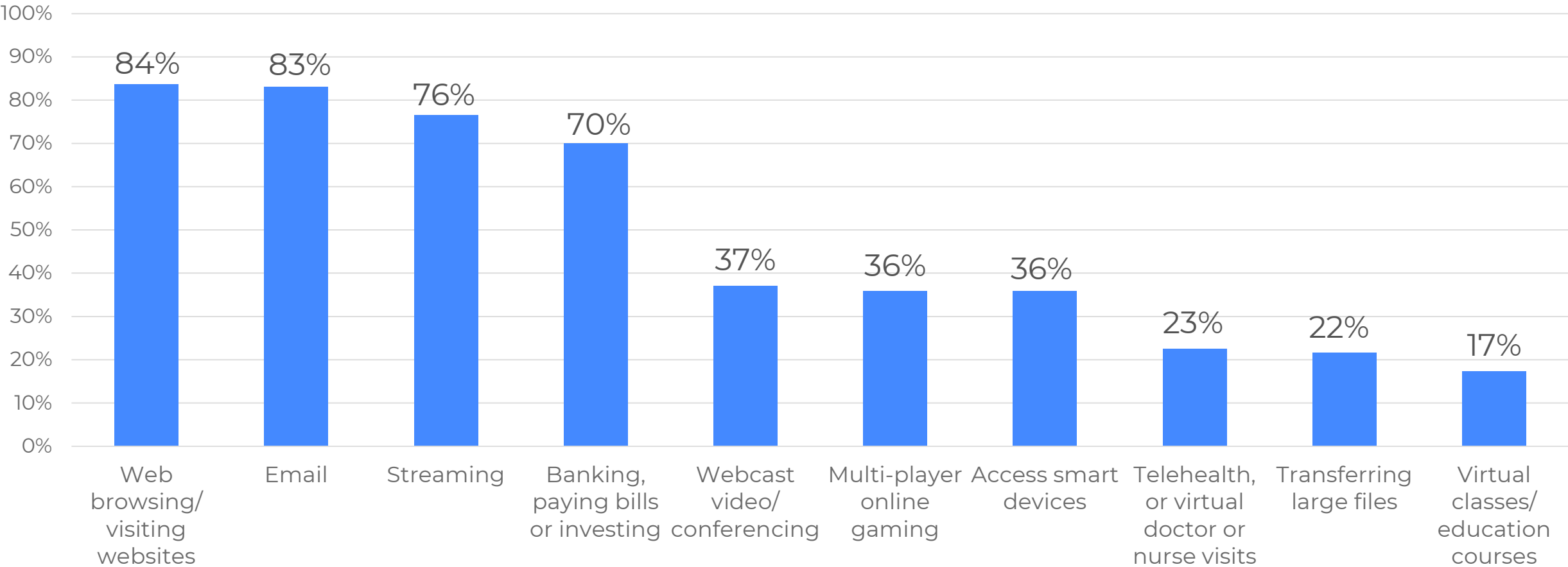
- 55% of 18 to 34
- 51% of 35 to 54
- 39% of 55 and older

Household Internet Usage Behaviors



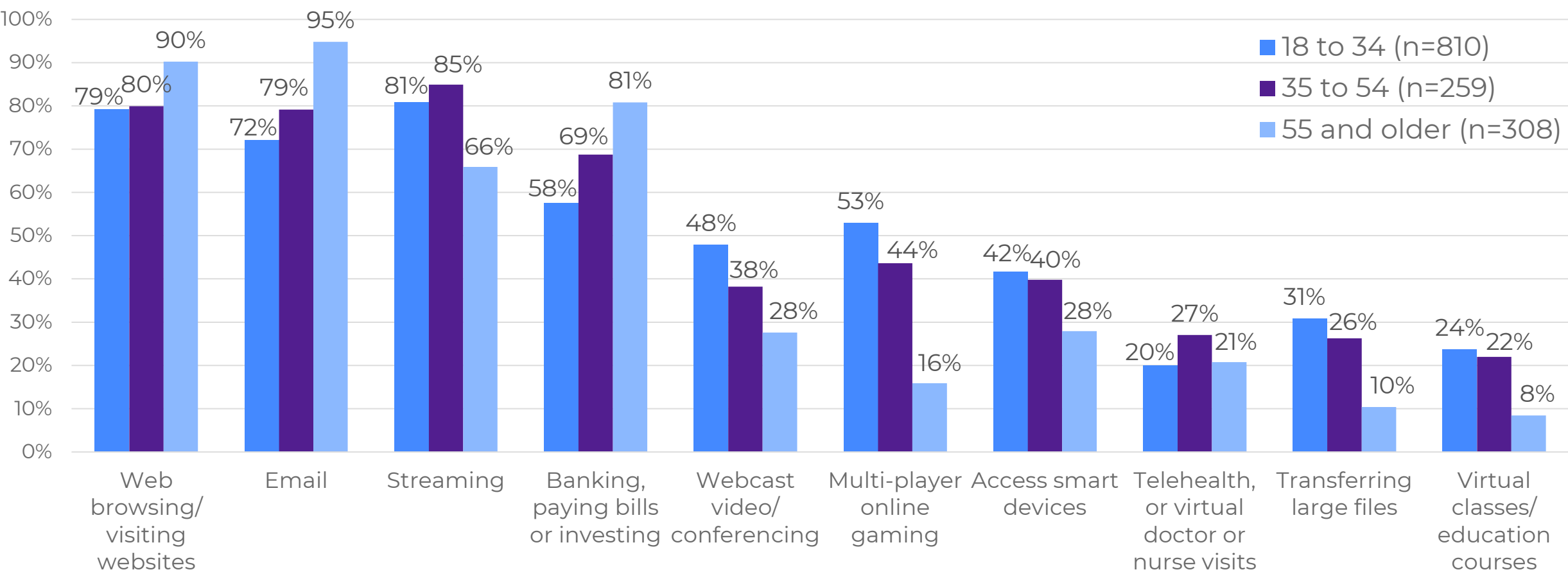
Internet Activities

Q22. For which of the following activities do household members use your internet? (n=807)
Check all that apply.



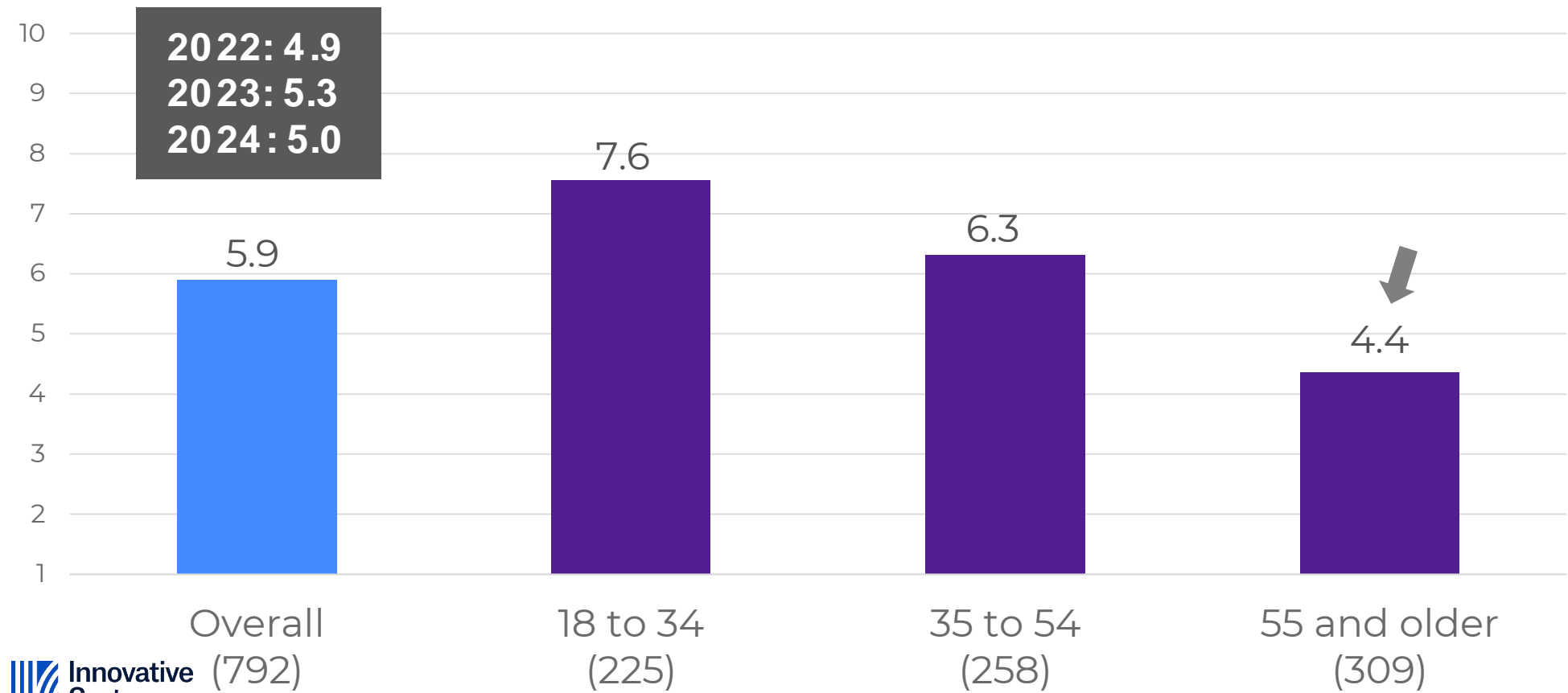
Internet Activities — by Age Group

Q22. For which of the following activities do household members use your internet? (n=807)
Check all that apply.



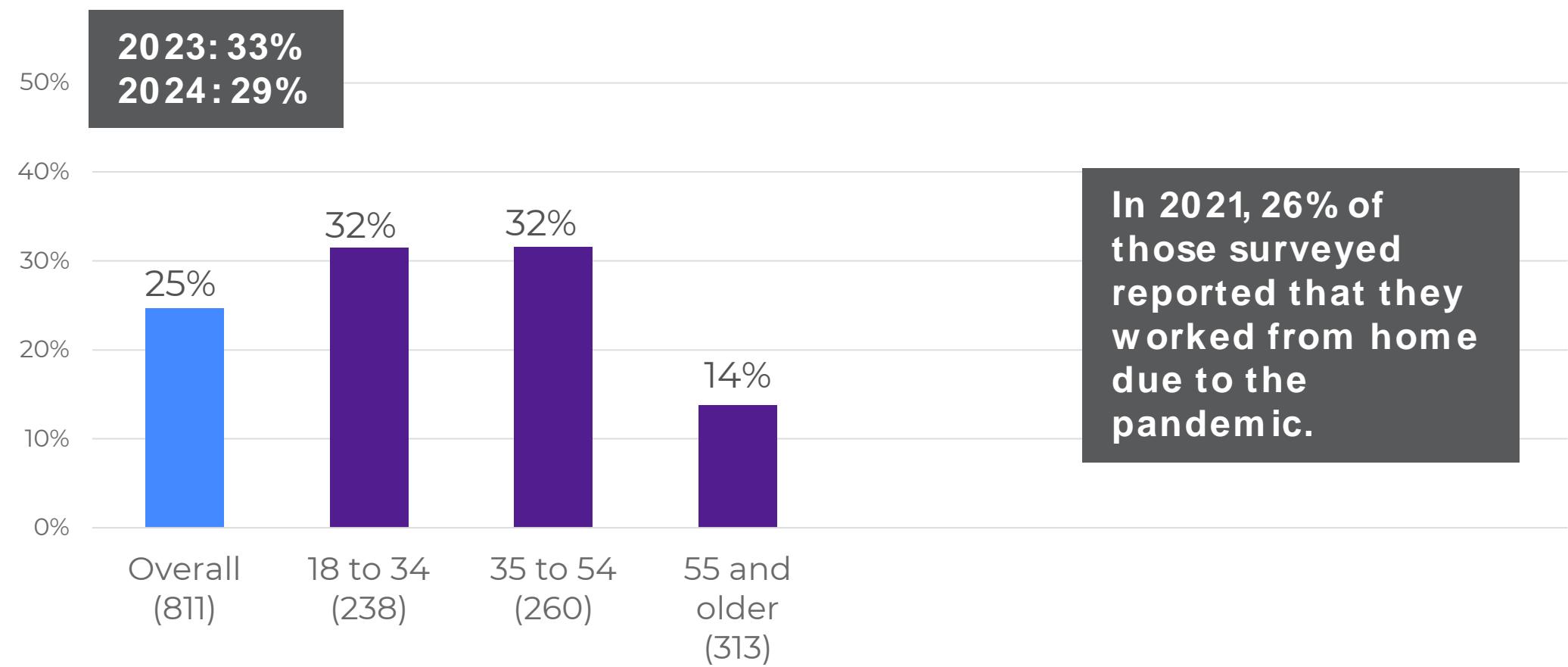
Number of Devices Connected at the Same Time

Q21. On a typical day, up to how many devices might be using your home internet at the same time (i.e., accessing the same Wi-Fi connection)? *Shown are means.*



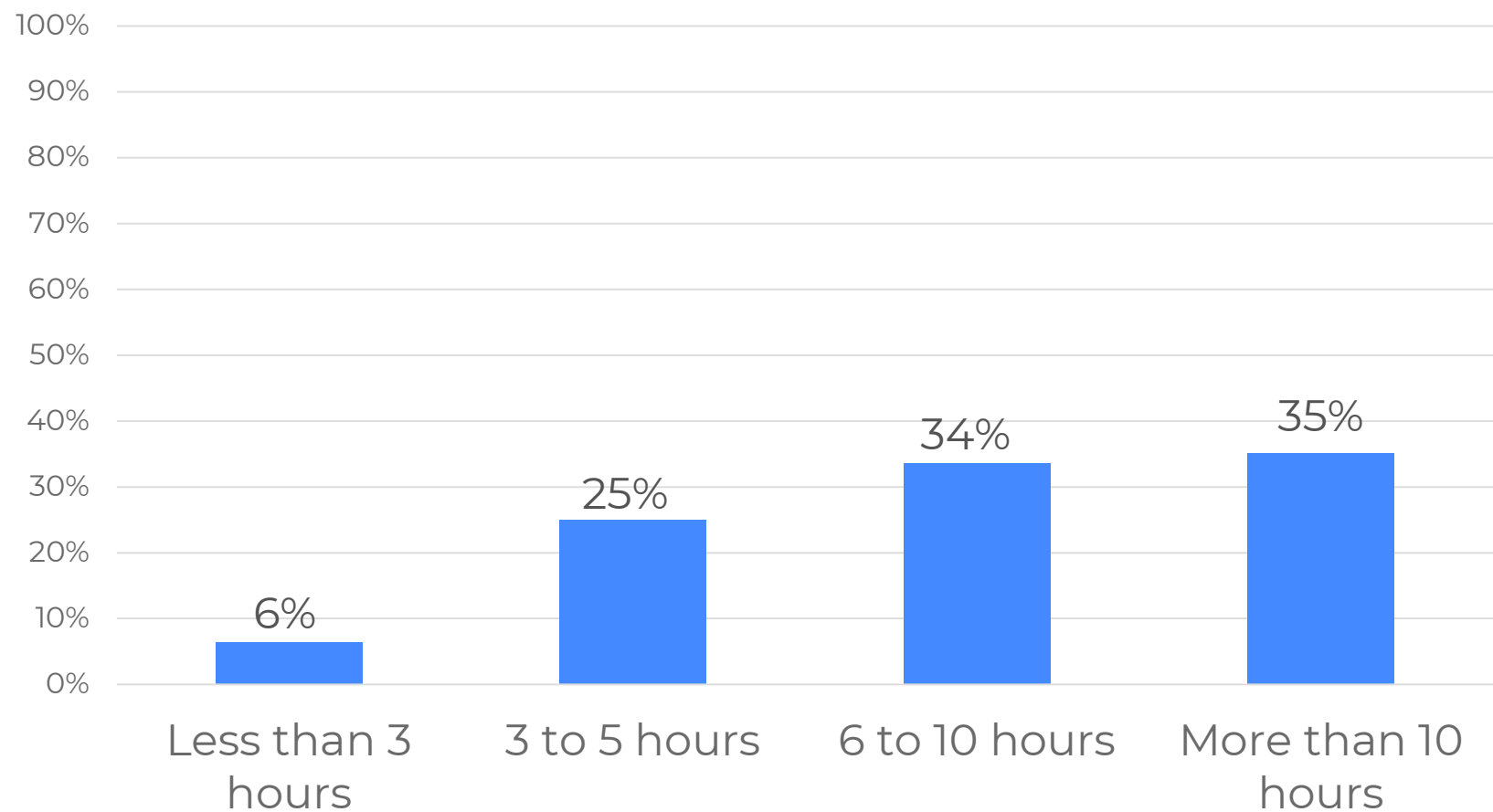
Work From Home

Q40. Do you or someone else in your household work from home? *Shown is the percentage of respondents answering “yes.”*



Internet Usage in a Typical Day

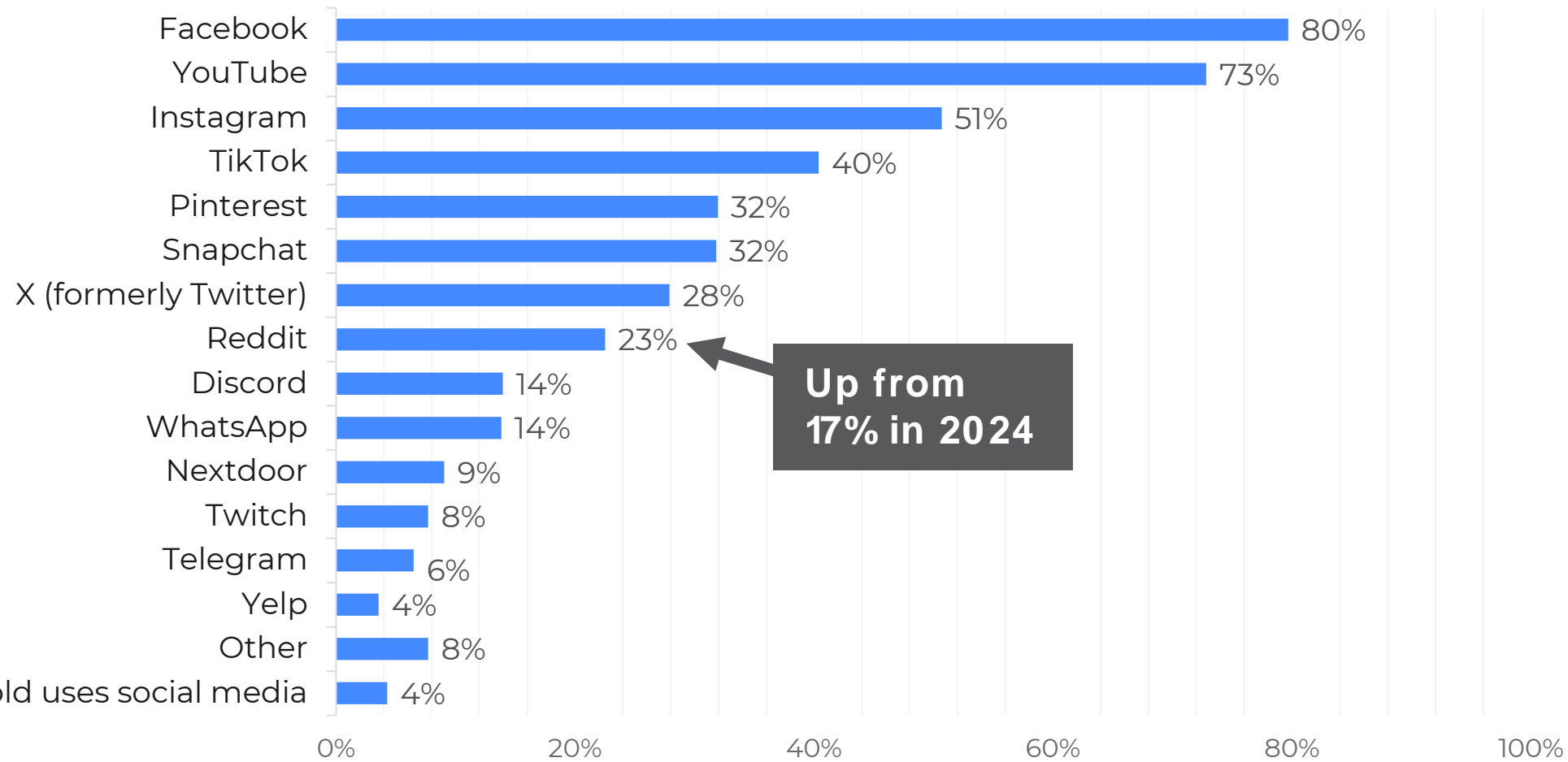
Q23. On a typical day, approximately how many hours is your home internet being used? (n=817)



More than 10 hours/day	
Age Group	%
18 to 34	41%
35 to 54	41%
55 or older	26%

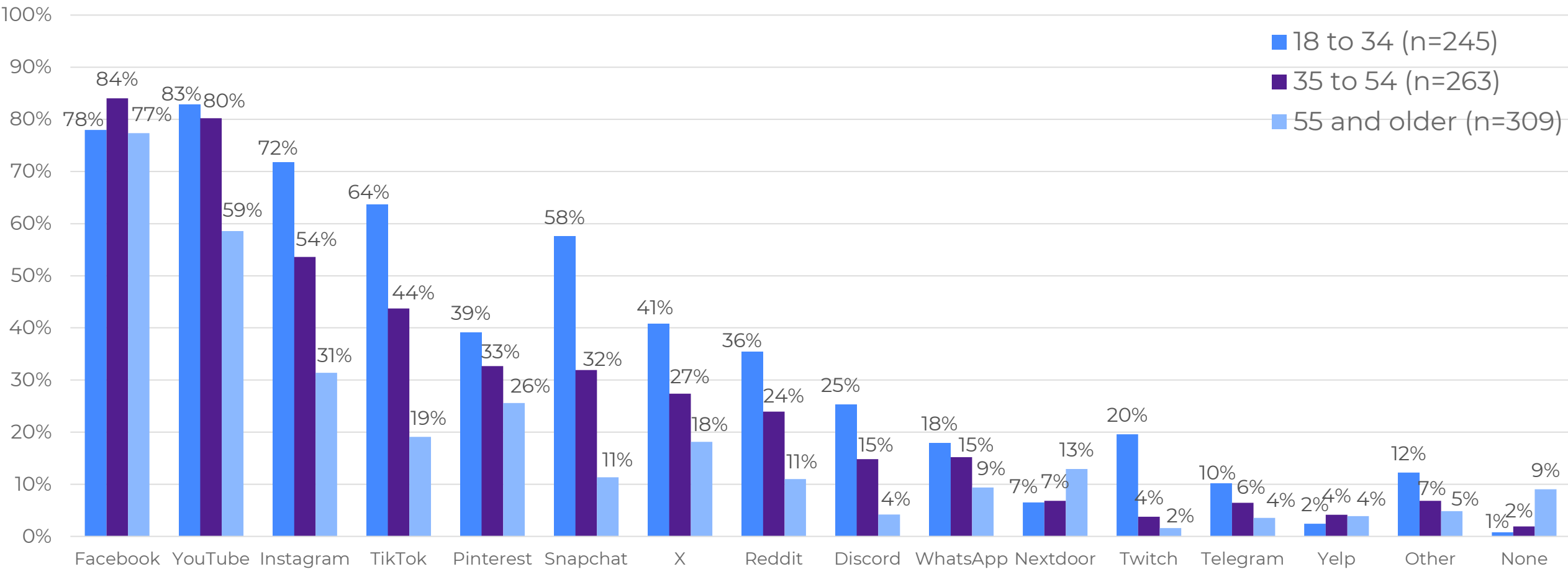
Social Media Platforms Used

Q24. Which of the following social media platforms/sites do you or others in your household use or visit? (n=817)
Check all that apply.



Social Media Platforms Used — by Age Group

Q24. Which of the following social media platforms/sites do you or others in your household use or visit?
Check all that apply.



Social Media Engagement with Provider

Q25. Do you ever engage/interact with your internet provider on social media for any of the following reasons?
Check all that apply.

	Total	18 to 34	35 to 54	55+
Total Answering:	817	245	263	309
Check outages	28%	41%	25%	19%
Report outages	19%	29%	19%	12%
To see when service will be available to my home	13%	23%	11%	7%
Check various announcements	13%	18%	15%	7%
Post reviews or comments	13%	20%	12%	7%
To view community involvement/events	12%	20%	9%	8%
Other	1%	0%	1%	1%
I don't ever engage or interact with my internet provider on social media	52%	32%	52%	69%

*Cells shaded *purple* are significantly higher; cells shaded *blue* are significantly lower.

Preferred Method of Being Contacted

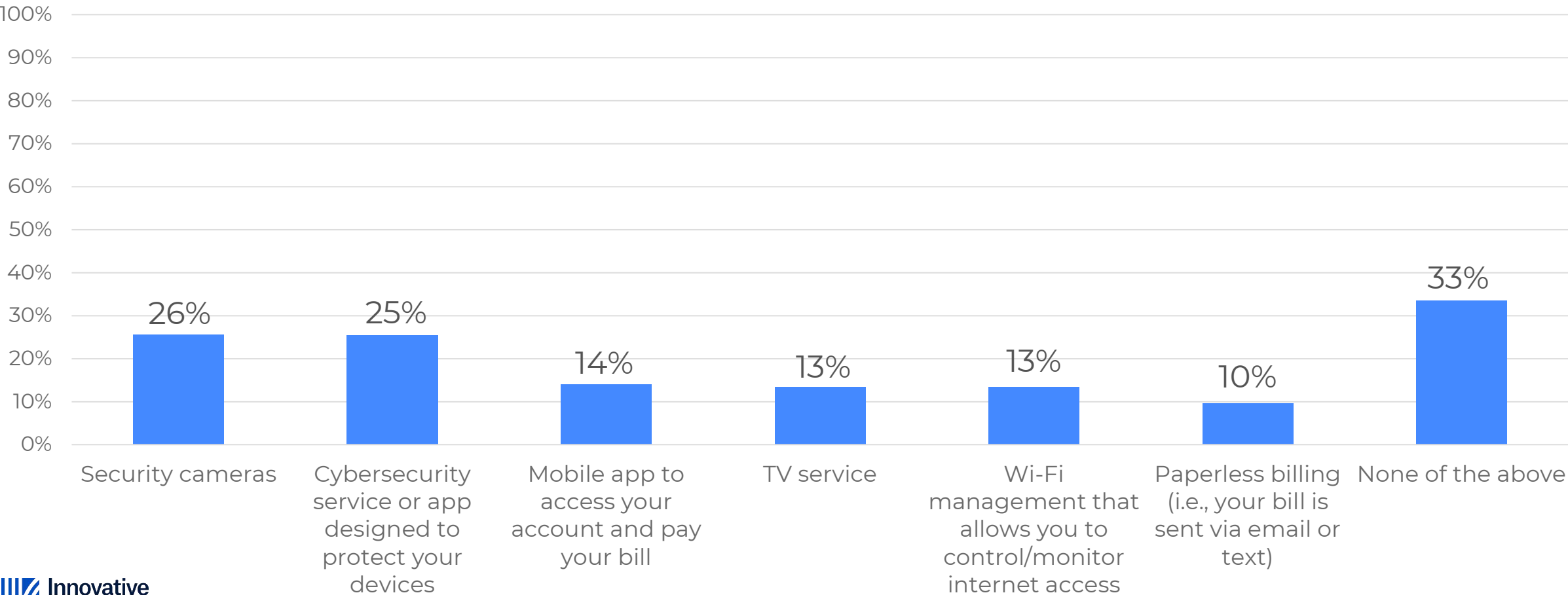
Q27. How would you rank the following from MOST (#1) to LEAST (#5) preferred method of contacting your internet provider, should you need them for anything? *Shown are mean rankings.*

	Total	18 to 34	35 to 54	55+
Total Answering:	817	245	263	309
Phone Call	2.5	2.7	2.6	2.2
Email	2.9	2.8	3.2	2.7
Text message	2.9	2.8	3.0	2.9
Website link or mobile app	3.3	3.2	3.1	3.5
Live chat on their website	3.4	3.5	3.2	3.7

*Cells shaded *purple* are significantly higher; cells shaded *blue* are significantly lower.

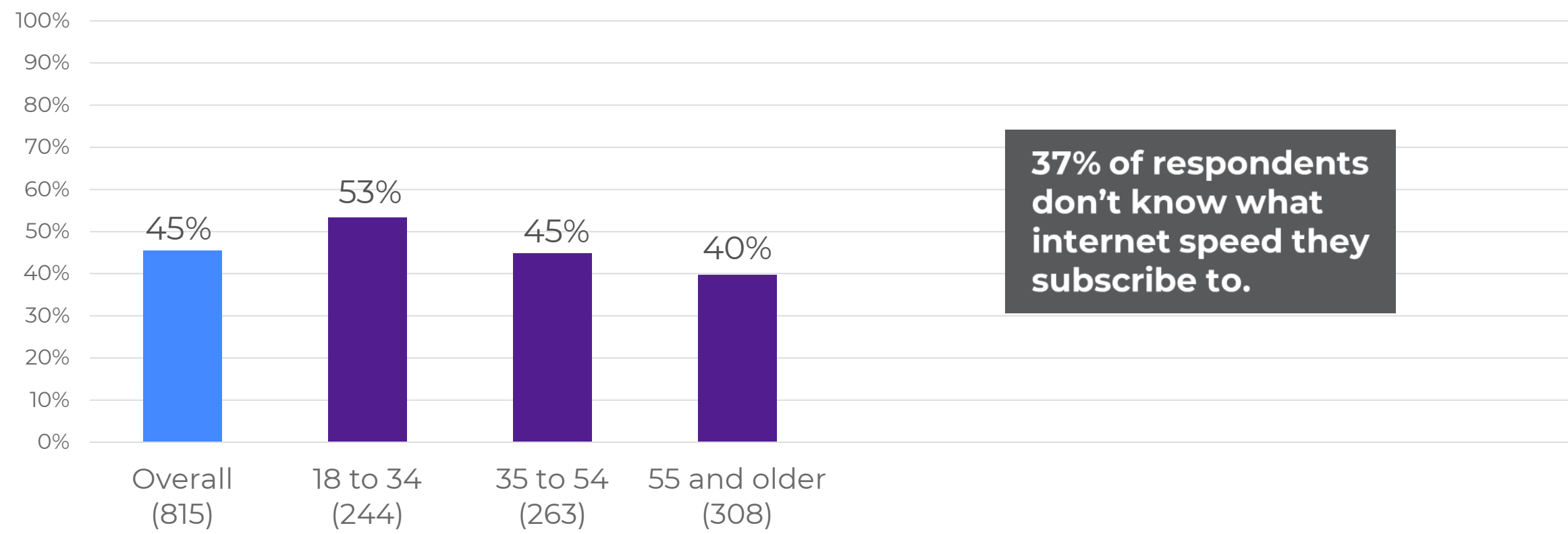
Interest in Additional Services/Features

Q29. If they offered it, which of these would you be interested in receiving from your internet provider, if any?
(n=816) *Check all that apply.*



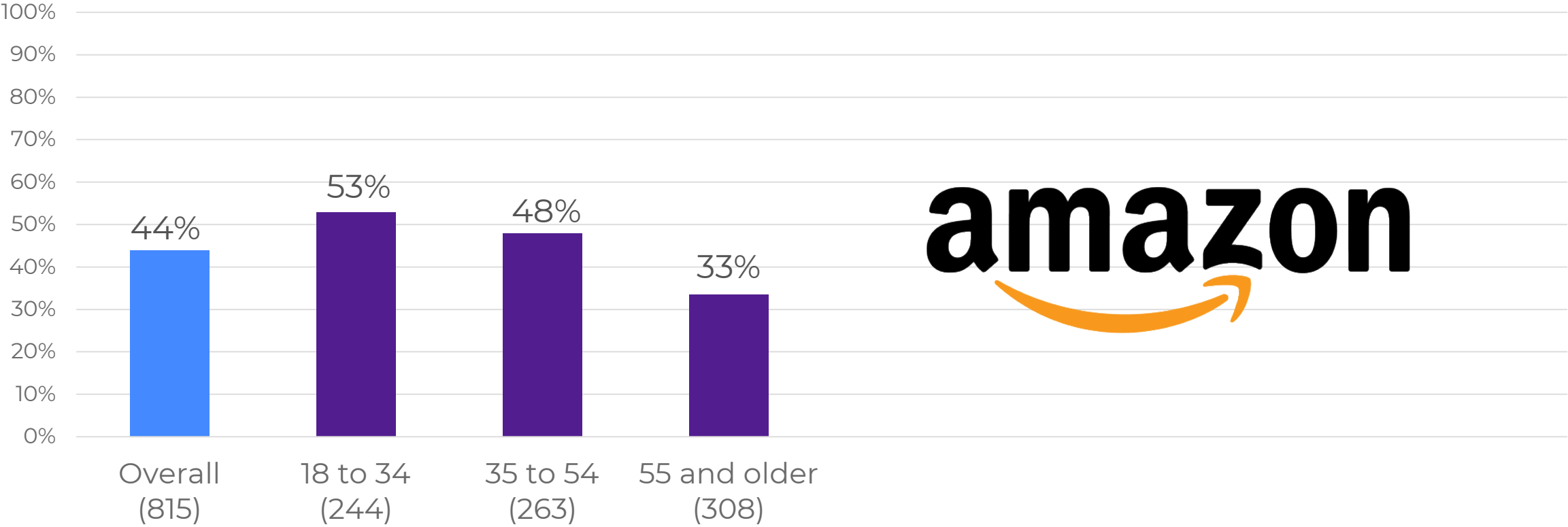
Interest in Internet Service from Cell Provider

Q30. If your cell phone provider offered you a bundled home internet service, would you consider switching to their internet service if it was comparable on reliability, speed and price? *Shown is the percentage of respondents answering “yes.”*



Interest in Internet Service from Amazon

Q31. If Amazon offered you a bundled home internet service with Amazon Prime, would you consider switching to their internet service if it was comparable on reliability, speed and price? *Shown is the percentage of respondents answering “yes.”*

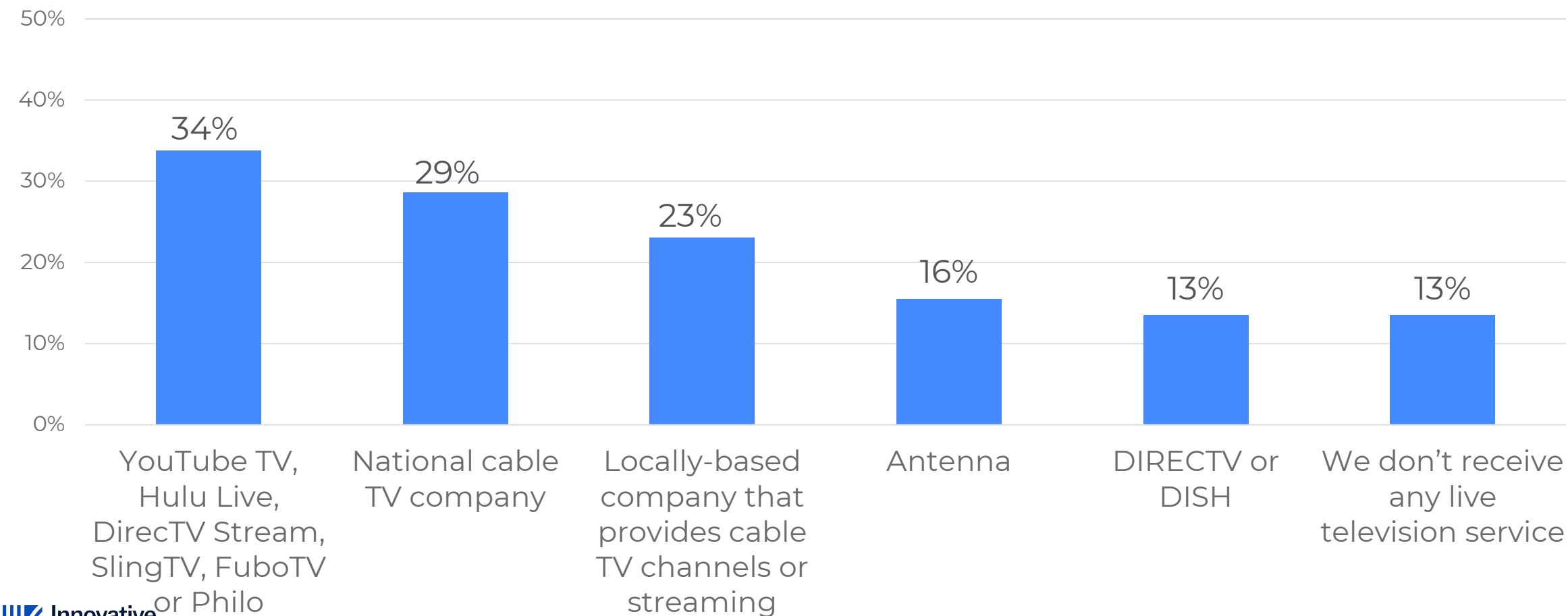


Video



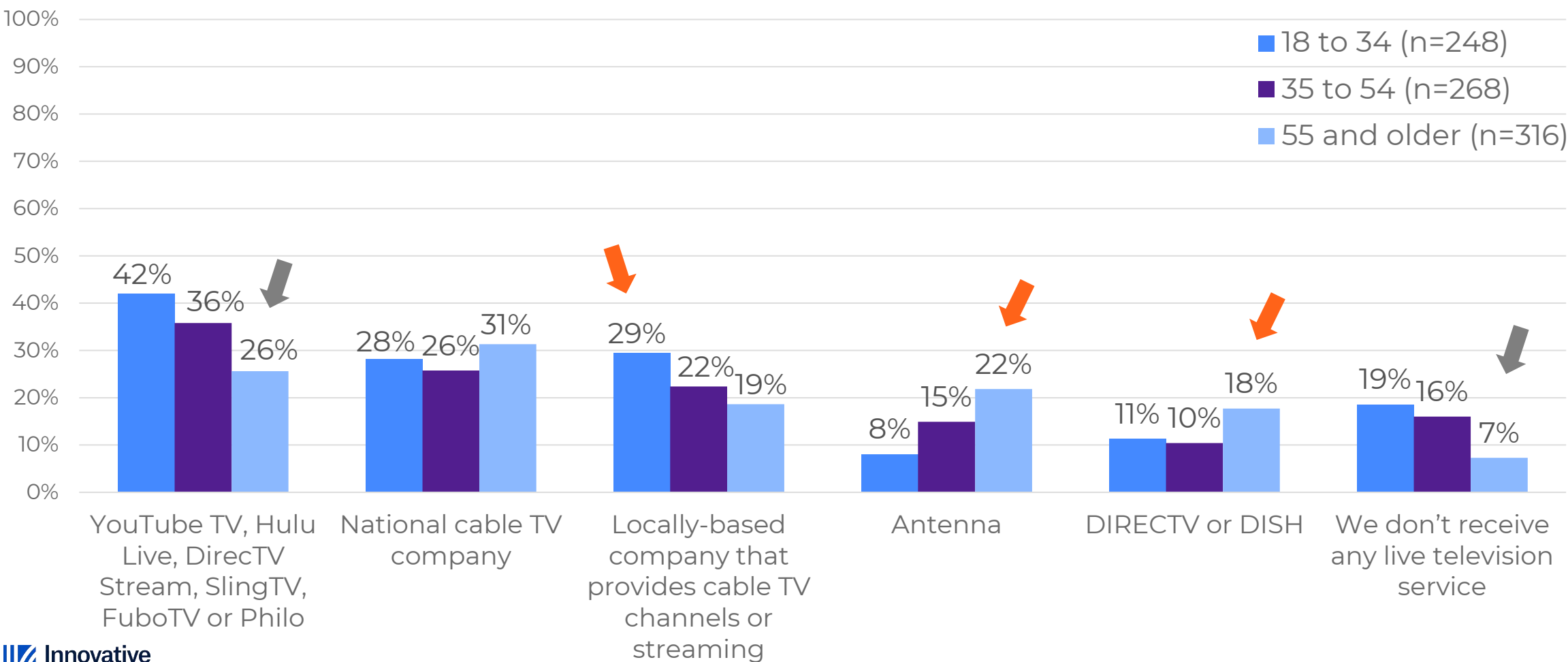
W a y s of Receiving Live TV

Q32. In which of the following ways do you receive **live** television service in your home? (n=832)
Check all that apply.



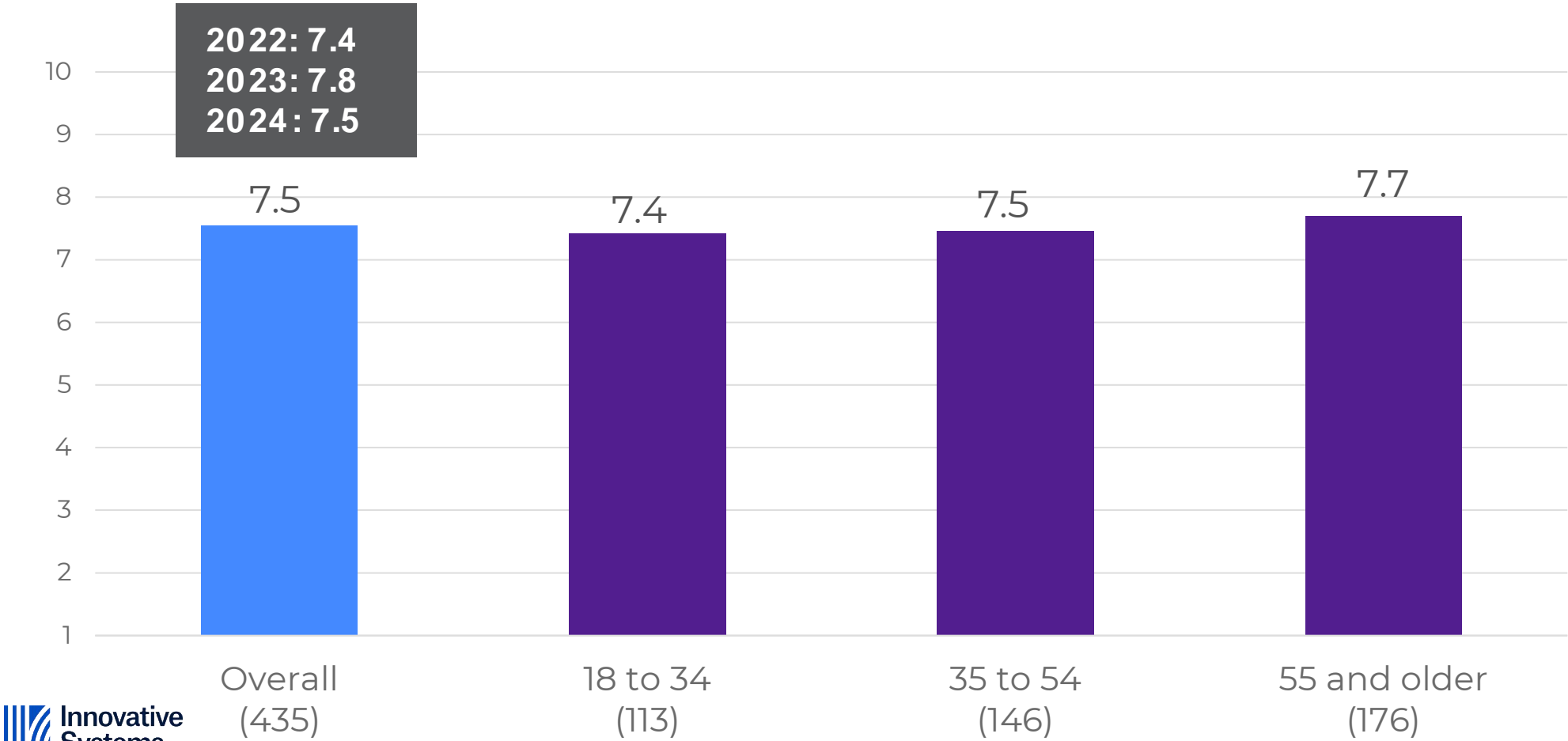
Ways of Receiving Live TV — by Age Group

Q32. In which of the following ways do you receive live television service in your home? *Check all that apply.*



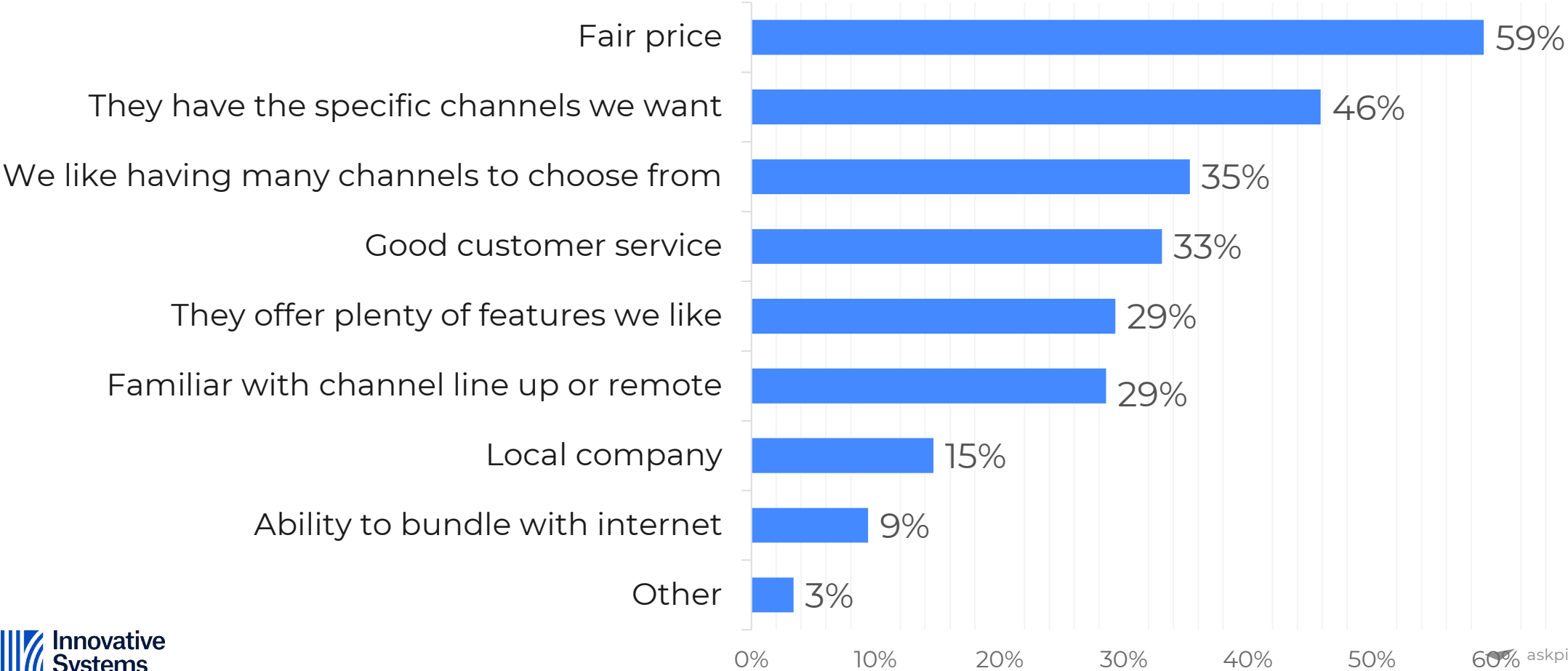
Satisfaction with Live TV Provider

Q33A. How would you rate your overall satisfaction with your live television provider? (Live-TV users only; n=435)
Shown are mean scores based on a 1 to 10 scale where 1 equals Completely Dissatisfied, and 10 equals Completely Satisfied. (Note question difference from 2024: “Please rate your overall satisfaction with your TV provider.”)



Drivers of Satisfaction with Live TV

Q33B. What has the greatest influence on your satisfaction? *Check all that apply*
(Asked of those who gave a rating of 8, 9, or 10 on Live TV Satisfaction; n=266)



Drivers of Satisfaction with Live TV — by Age Group

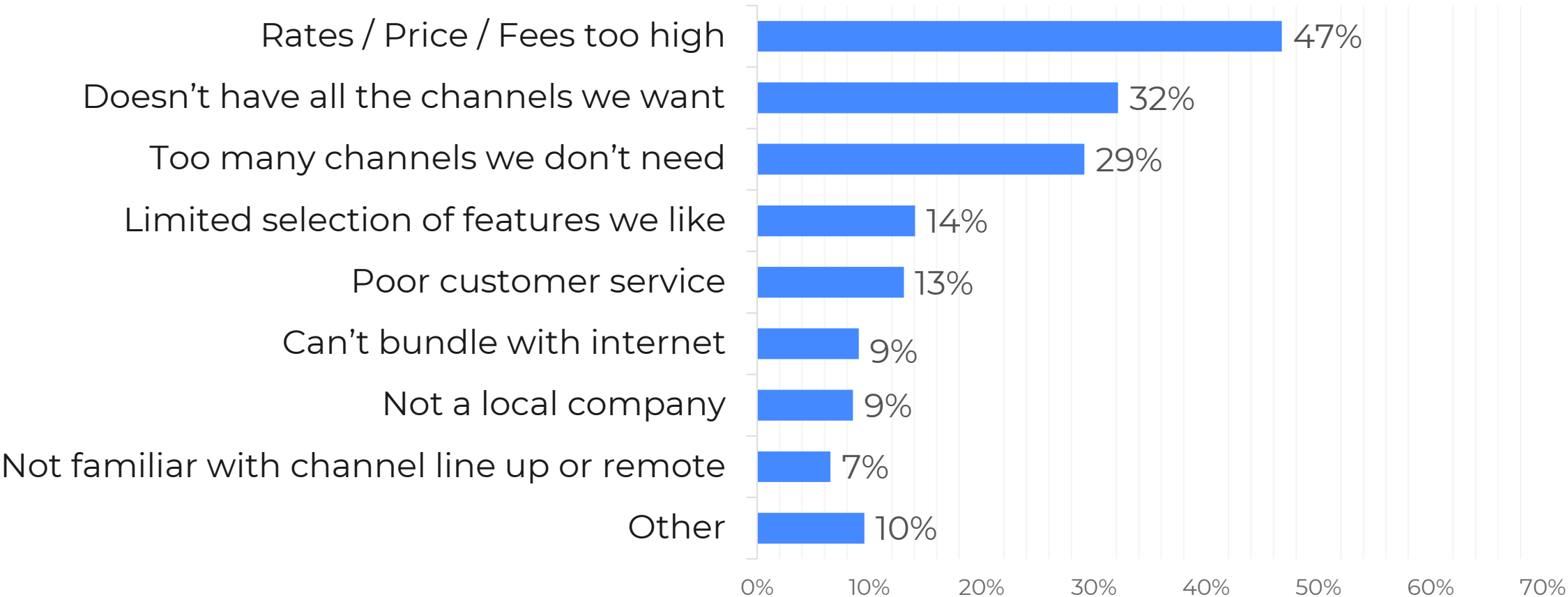
Q33B. What has the greatest influence on your satisfaction? *Check all that apply*
(Asked of those who gave a rating of 8, 9, or 10 on Live TV Satisfaction; n=266)

	Total	18 to 34	35 to 54	55+
Total Answering:	266	59	88	119
Fair price	59%	66%	57%	57%
They have the specific channels we want	46%	36%	41%	55%
We like having many channels to choose from	35%	31%	34%	39%
Good customer service	33%	49%	32%	26%
They offer plenty of features we like	29%	37%	31%	24%
Familiar with channel line up or remote	29%	19%	23%	38%
Local company	15%	14%	16%	14%
Ability to bundle with internet	9%	22%	10%	3%
Other	3%	2%	1%	6%

*Cells shaded *purple* are significantly higher; cells shaded *blue* are significantly lower.

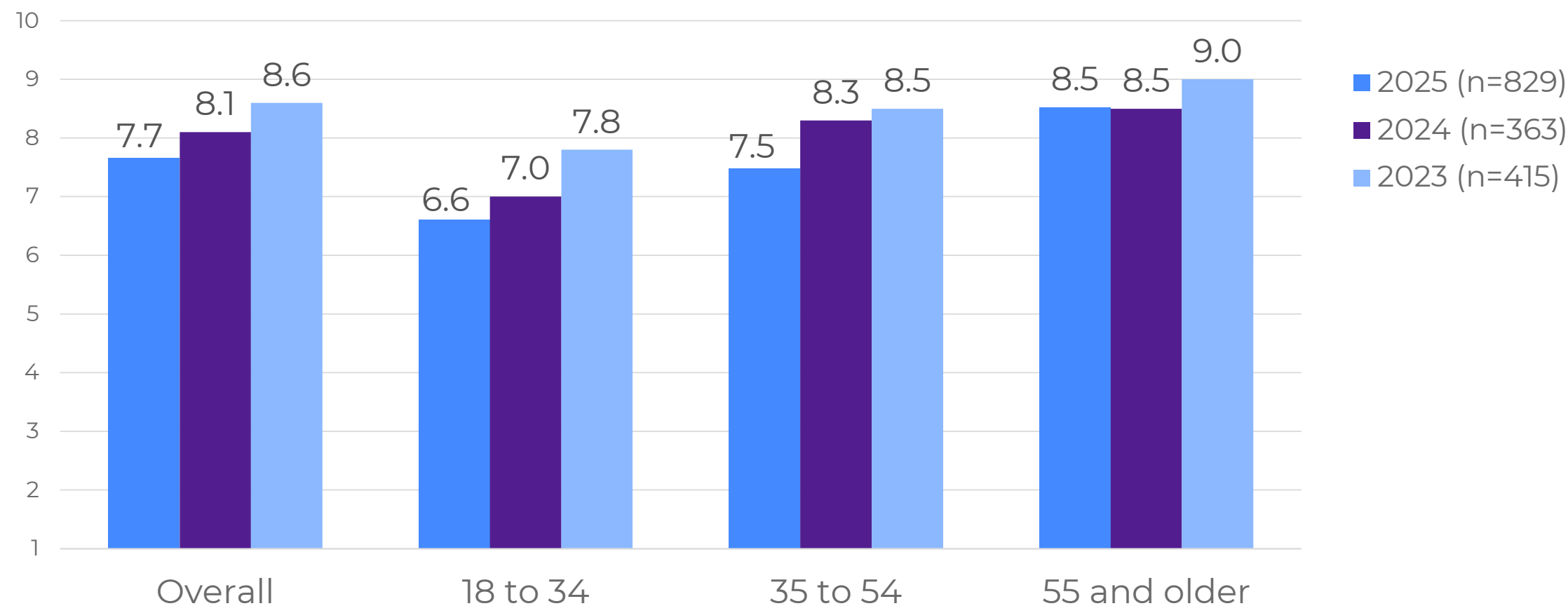
Drivers of Low Satisfaction with Live TV

Q33C. What keeps you from giving a higher rating? *Check all that apply*
(Asked of those who gave a rating of 7 or lower on Live TV Satisfaction; n=199)



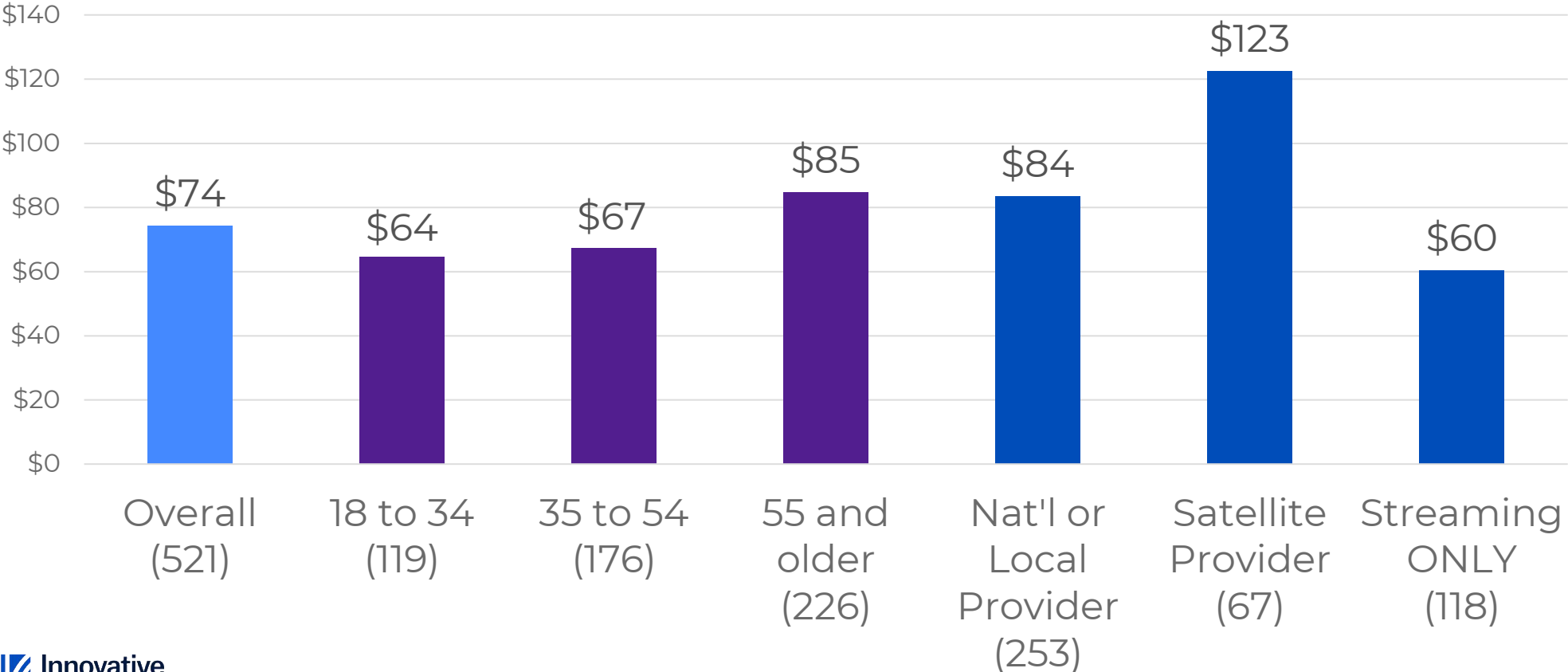
Importance of Local Programming

Q34. How important is it for your household to have channels with local news, weather and sports? *Shown are mean scores based on a 1 to 10 scale where 1 equals Not at all Important, and 10 equals Very Important.*



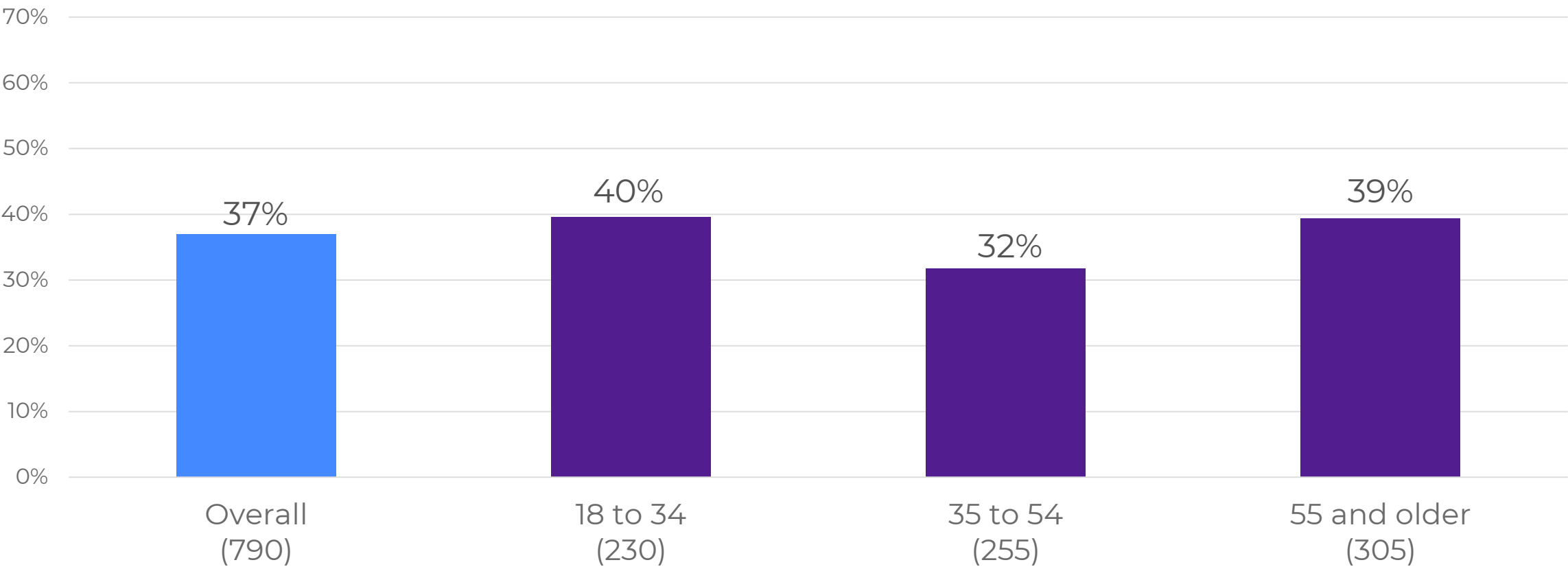
Average Current Spend on Live TV

Q35. Approximately how much do you pay per month, in total, for live television service? (n=456)



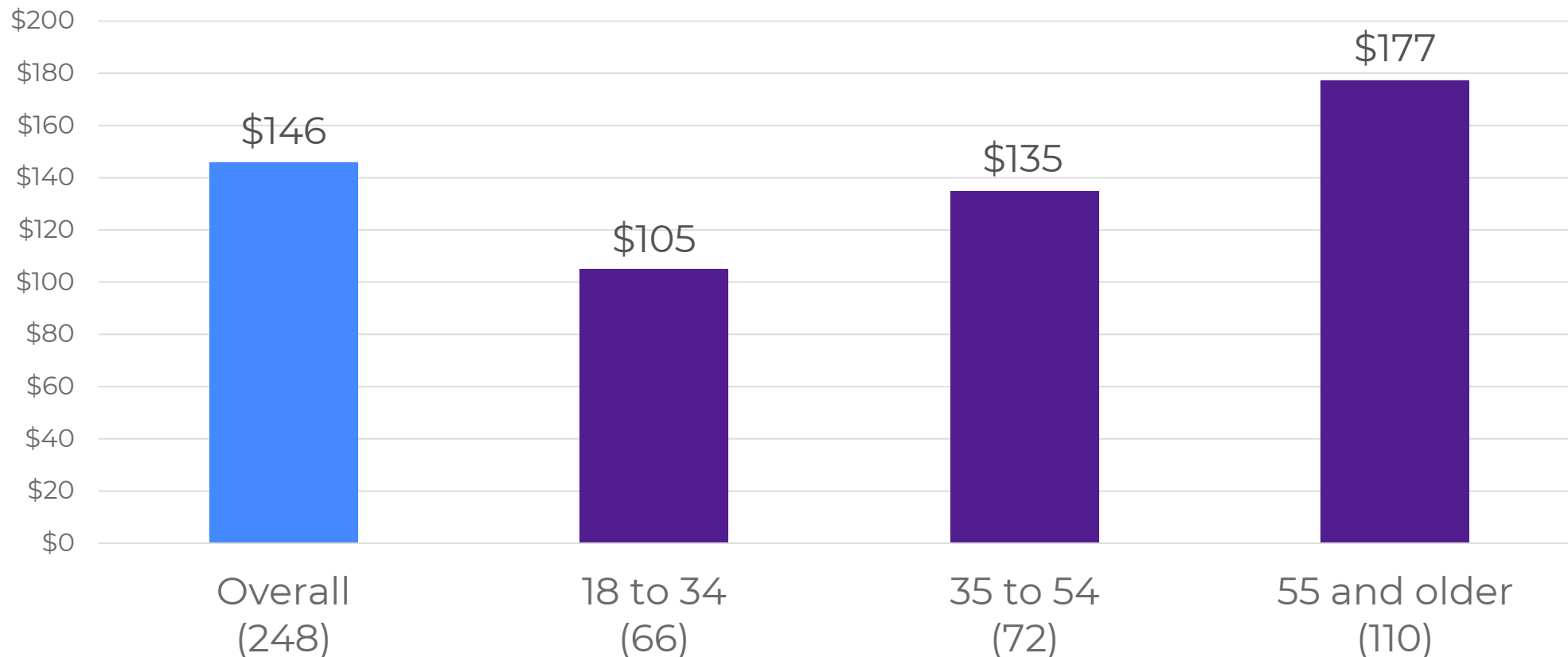
Bundle Internet and TV Service

Q12. Do you subscribe to TV service from your internet service provider? (i.e., do you bundle TV and internet with the same provider?) *Shown is the percentage of respondents answering “yes.”*



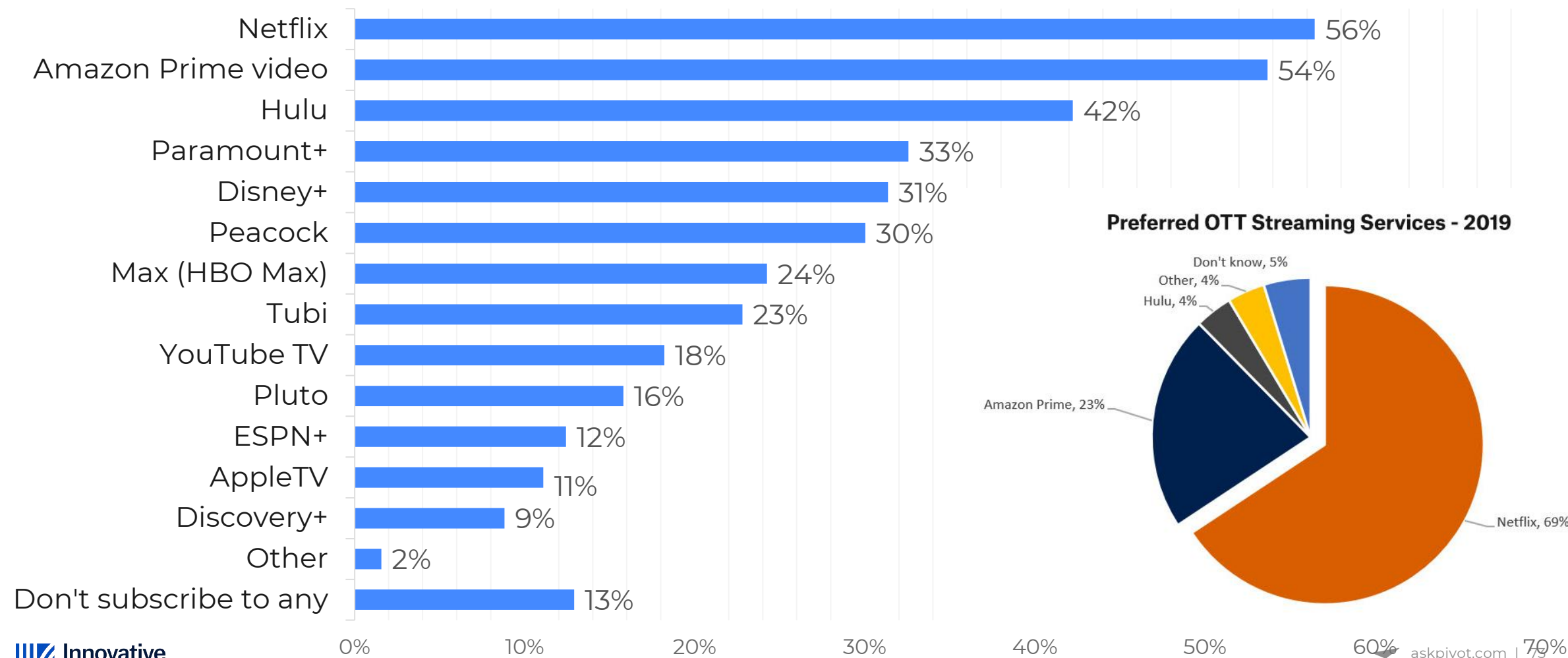
Average Current Spend on Internet and TV Bundle

Q13. What is the approximate total amount you're paying per month for your bundle that includes both your TV and internet service? (Asked of those who subscribe to TV service from their internet service provider; n=248)



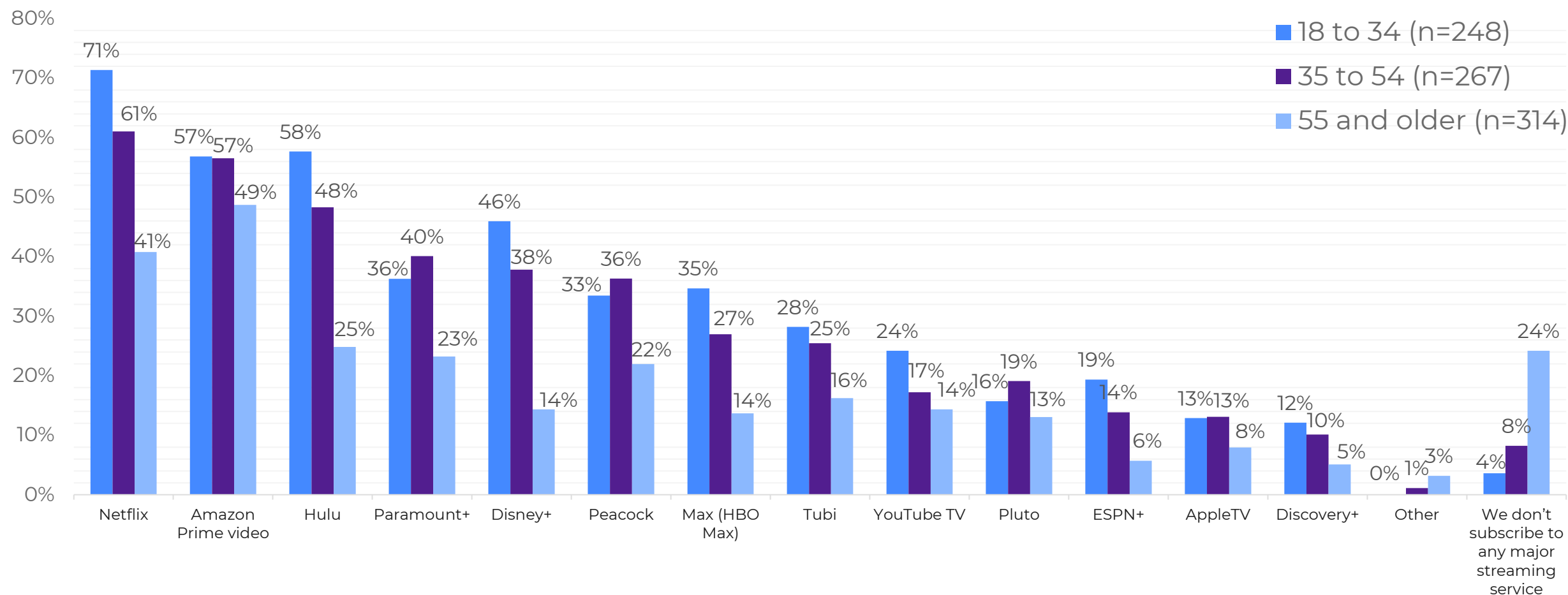
Streaming Services Subscribed To

Q36. Which of the following major streaming service(s), if any, do you subscribe to? (n=829) *Check all that apply.*



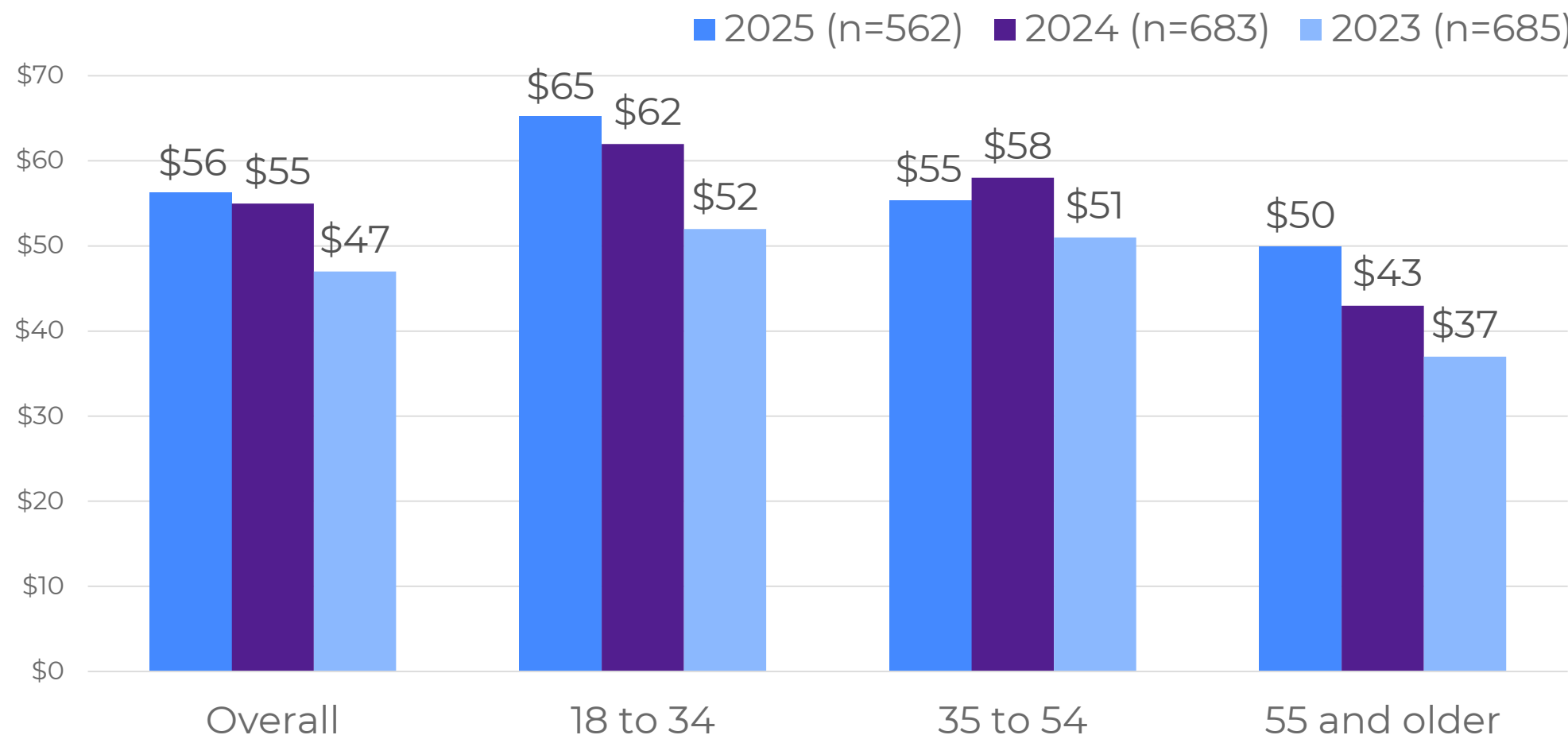
Streaming Services Subscribed To — by Age Group

Q36. Which of the following major streaming service(s), if any, do you subscribe to? *Check all that apply.*



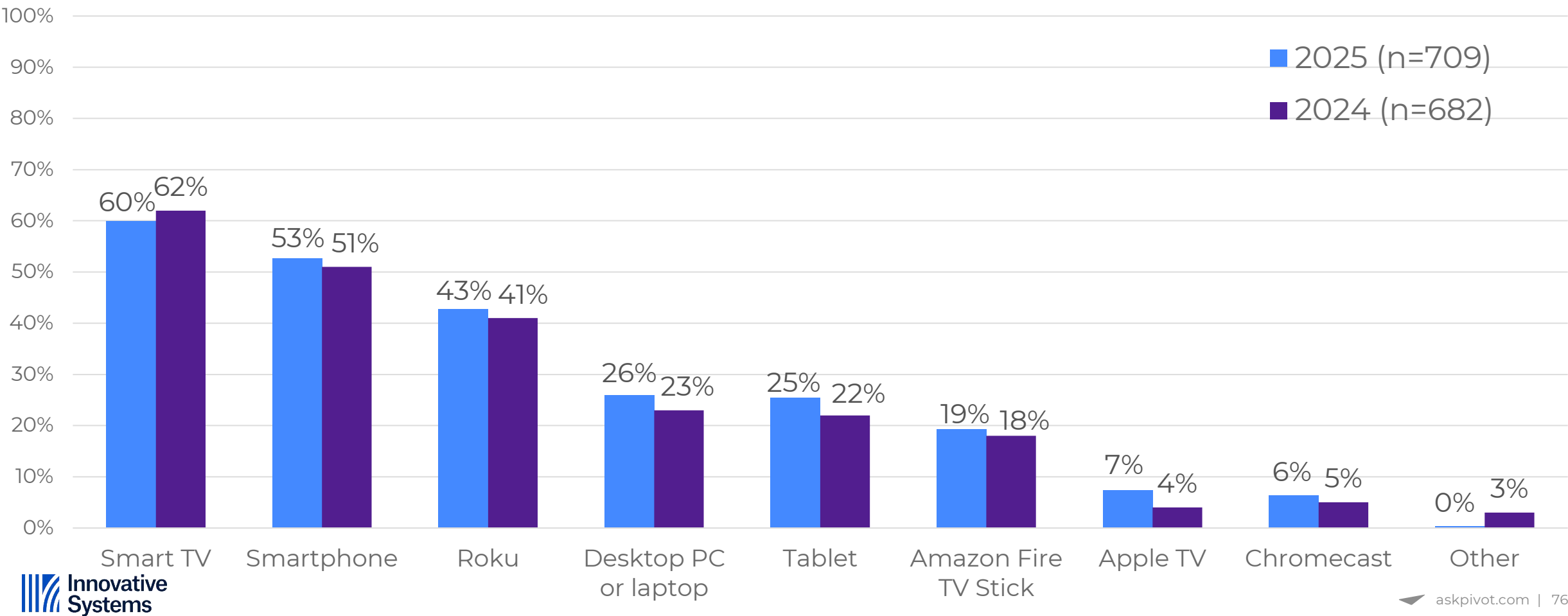
Average Monthly Spend on Streaming

Q37. Approximately how much do you pay per month, in total, for all major streaming services you subscribe to?



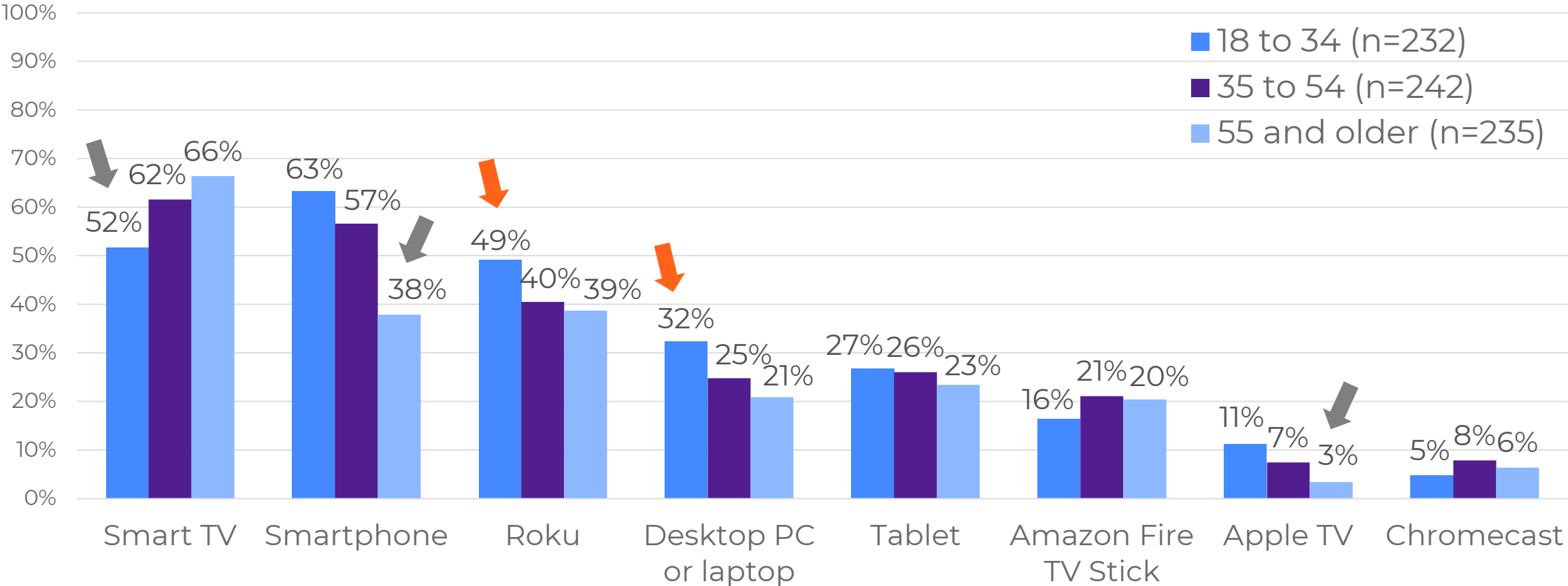
Device(s) Used for Streaming

Q38. What device(s) do you use for streaming? (n=709) *Check all that apply.*



Device(s) Used for Streaming

Q38. What device(s) do you use for streaming? *Check all that apply.*



Key Findings



- Satisfaction levels are similar to past levels (7.5), and **customers of locally based providers are significantly more satisfied** than customers of national providers (7.9 vs 7.4). (Q6A)
- **Top drivers of high internet satisfaction** continue to be: *Good/Consistent connection speed* (68%), and *fair price* (61%). Customers of local providers are significantly more satisfied speed, price and customer service. (Q6B)
- The **top causes of low satisfaction** are again *rates/prices too high* (54%) and *poor or inconsistent connection speed* (48%). Customers of local providers are more likely to say their satisfaction is low because they don't have the ability to bundle with other services (22% vs 5% of national providers' customers). (Q6C)
- Top **examples of “exceptional” service** include connection reliability (14%), good tech support (13%) and good customer service (13%). (Q6D)

- Average **monthly spend** on internet service is \$79, an increase from \$69 in 2024. (Q14)
- Similar to previous studies, 28% of all internet subscribers said they would **prefer a much faster internet speed** and would be willing to pay for it. The **average monthly amount they're willing to spend is \$96** (vs. \$83 in 2023). (Q14, Q15, Q16)
- Among those who know their **internet speed tier** (63%), the most **common is 100 to 499 Mbps**. Only 23% subscribe to *speeds under 100 Mbps*. The middle age group of 35 to 54 (26%) is more likely than those younger (19%) or older (13%) to subscribe to *gig speed or faster*. (Q17)
- A total of 20% said they have **switched internet providers** in the past two years. The **most common reason for switching** is for *faster speed* (48%), followed by *lower price or promo pricing* (45%). (Q19)

- The **most common way respondents receive live TV service** is through locally based and national cable TV providers, accounting for 52%. Following that, 34% of rural consumers receive their live TV service from national providers such as YouTube TV, Hulu Live, DirecTV Stream, SlingTV, FuboTV, or Philo.
- **Top drivers of TV satisfaction** are: *fair price* (59%), *having the specific channels they want* (46%), and *having many channels to choose from* (35%). Customers of live streaming only (67%) and national or local provider (63%) are more likely to say *fair price*. (Q33B)
- **The top reasons for low TV satisfaction** are *rates/price/fees too high* (47%), *doesn't have all the channels we want* (32%) and *too many channels we don't need* (29%). Customers of satellite dish only are more likely to say *rates/price/fees too high* (70%).(Q33C)

- Average **monthly spend** on live TV service is \$74. Satellite dish customers pay significantly more (\$123), while those who stream live TV pay the least (\$60). (Q35)
- A total of 87% subscribe to **at least one major streaming service**. This is up from 85% in 2024 and 82% in 2023. Average monthly spend is \$56, up from \$55 in 2024 and \$47 in 2023. (Q36, Q37)
- Similar to 2024 findings, the most common devices used for streaming are smart TV (60%), smartphone (53%) and Roku (43%). (Q38)
- Average **importance rating for local programming** is 7.7, continuing a downward trend from 8.1 in 2024 and 8.6 in 2023. (Q34)

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Executive
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