

6th Annual Rural Video and Broadband Industry Study

2021



About This Study

This research study was conducted by [Pivot Group](#) and sponsored by [Innovative Systems](#). Research goals included determining TV, video, and broadband usage behaviors of U.S. rural consumers who subscribe to internet services. Over 800 residential rural consumers from across the entire U.S. participated in this study, providing a statistically significant representative sample of U.S. rural internet subscribers.

Methodology

1. These findings are based on surveys collected in January and February 2021.
2. Both an online panel and phone calling methodologies were used to sample rural residents across the country. A total of 807 surveys were collected, providing a margin of error of +/- 3.5%.
3. The survey instruments were written by Pivot Group with input, collaboration, and additional questions provided by Innovative Systems.

About Us

Serving the Communications Industry
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Financials
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InnoStream™ MG-TV Video Services

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Hosted Live Streaming
200+ Systems in North America

APMax™ Voice Services

Hosted Voice Solutions
SIP Phone Provisioning and Management Software
820 APMAX Systems Deployed in North America



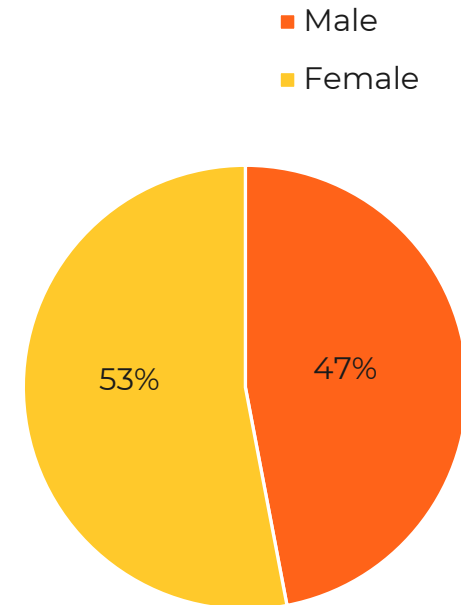
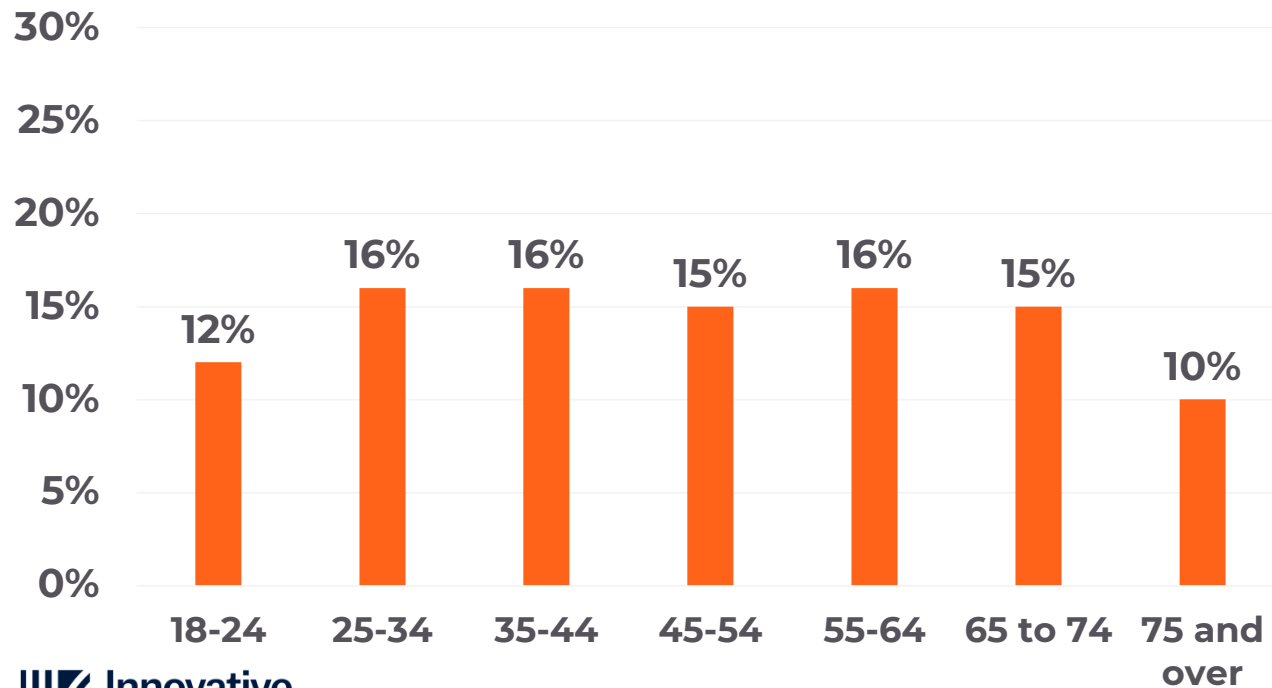
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Demographics



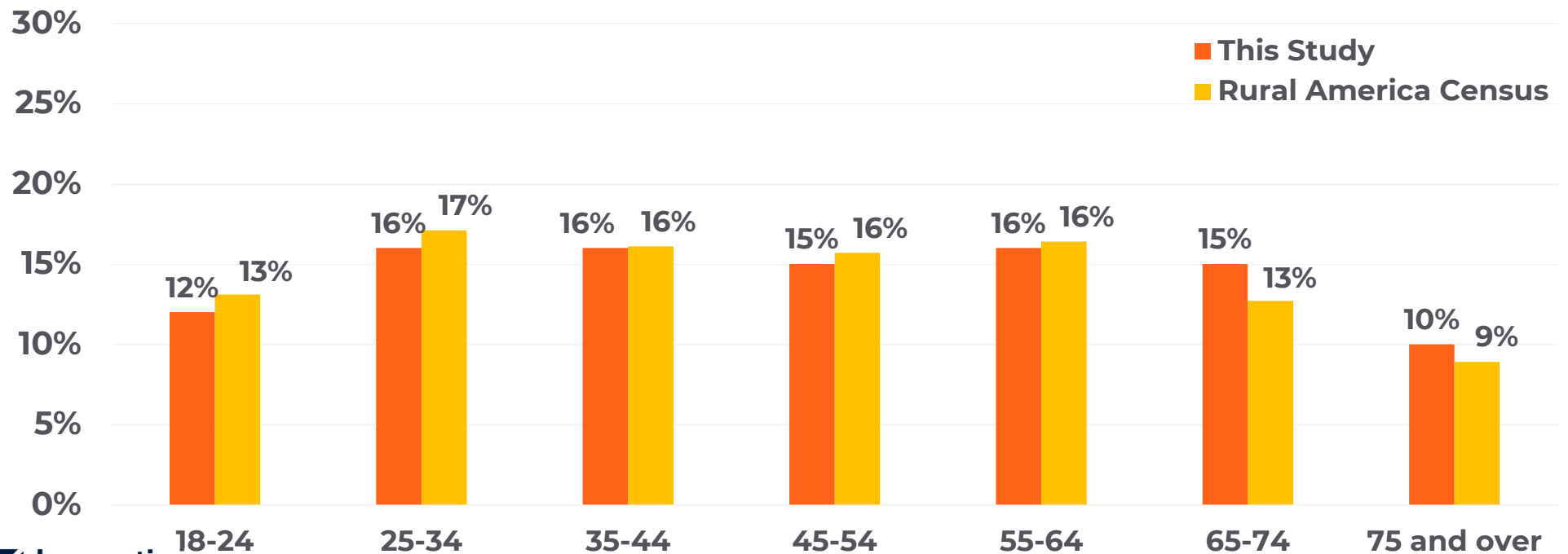
Participation in this Survey – By Age and Gender

Total Respondents: 807



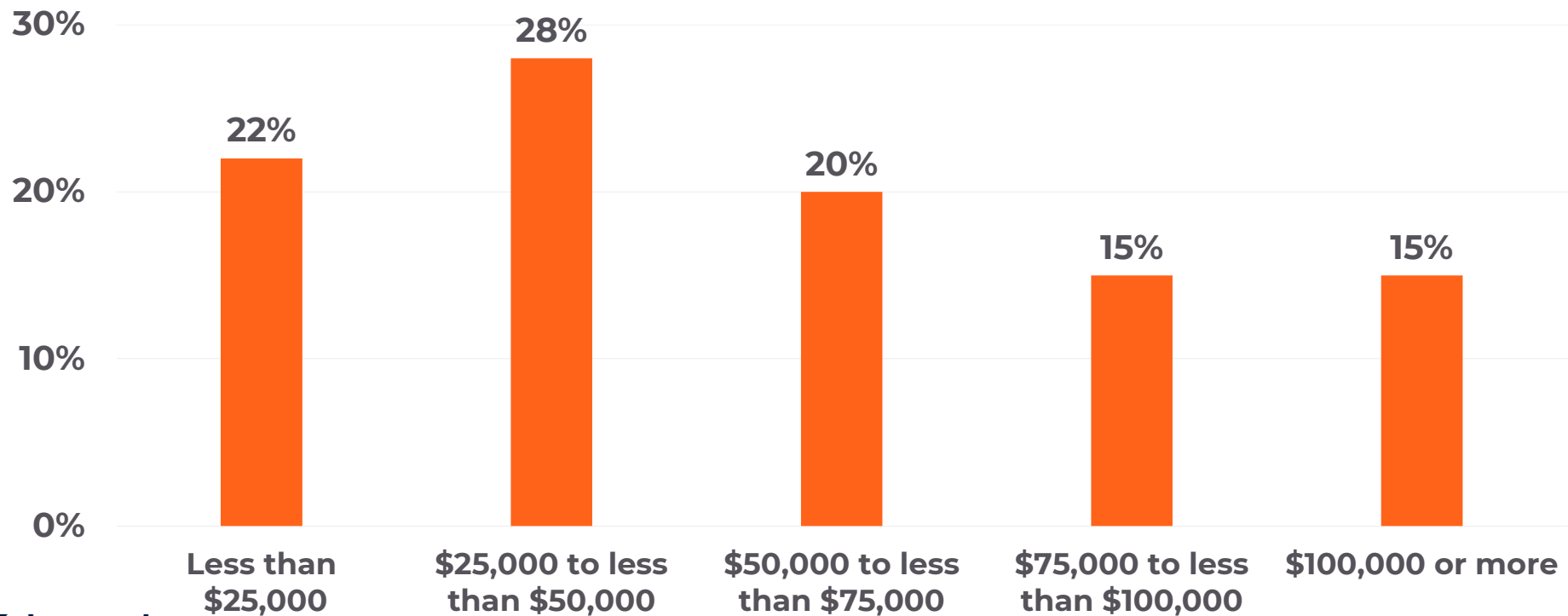
Participation in this Survey – Compared to U.S. Census Data

Total Respondents: 807



Participation in this Survey – By Income

Total Respondents: 752

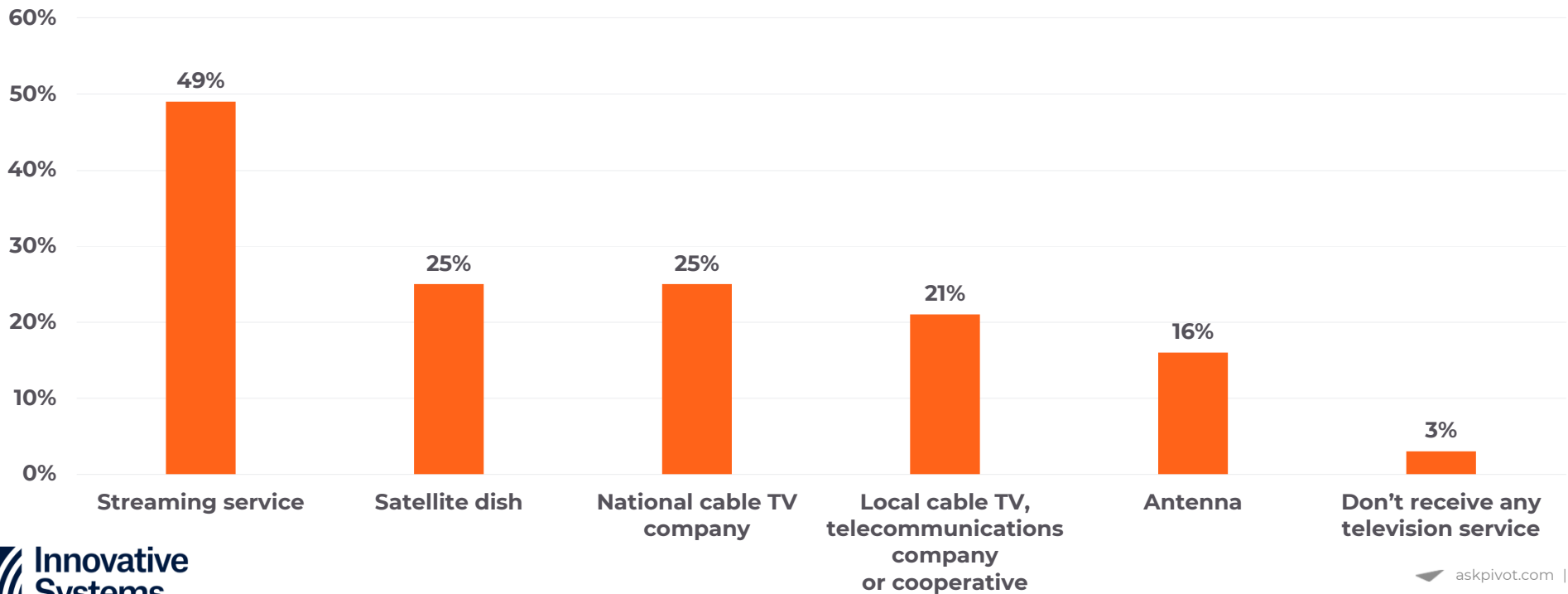


Video



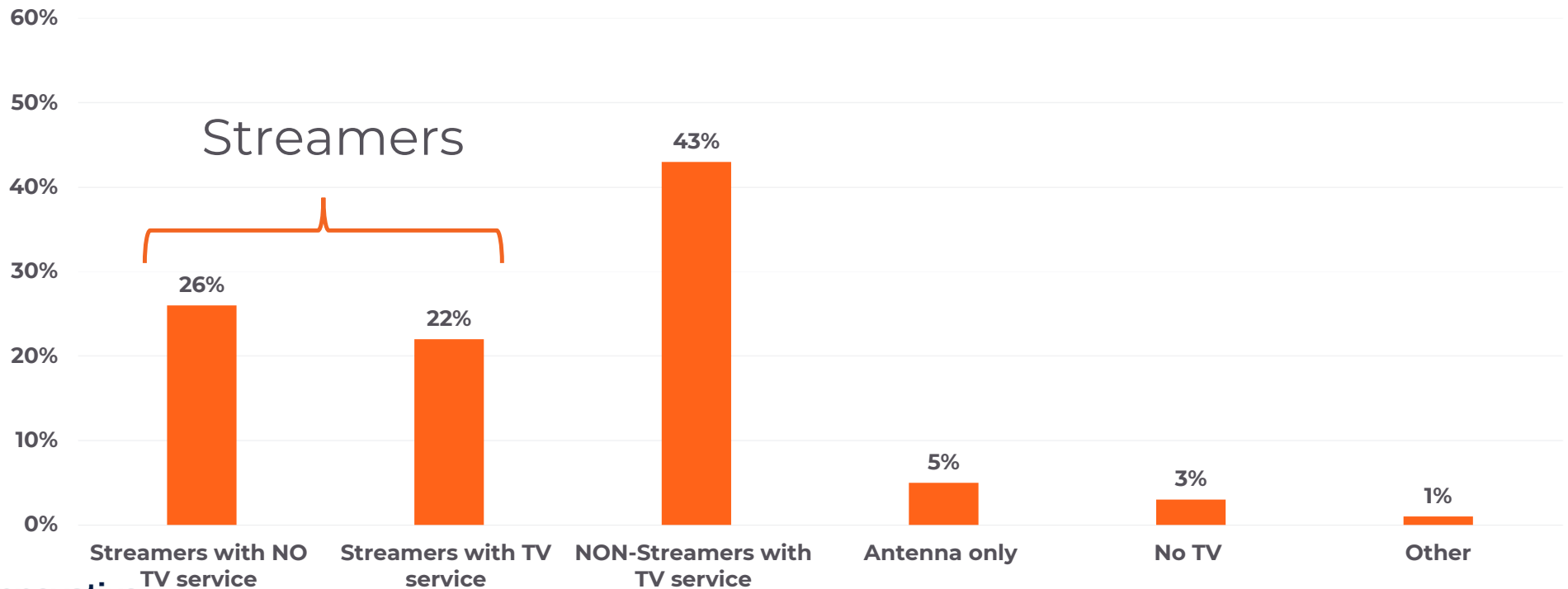
How Are You Receiving TV Service?

Q5. Which of the following describes how you receive television service in your home? **(n=807)** *Check all that apply.*



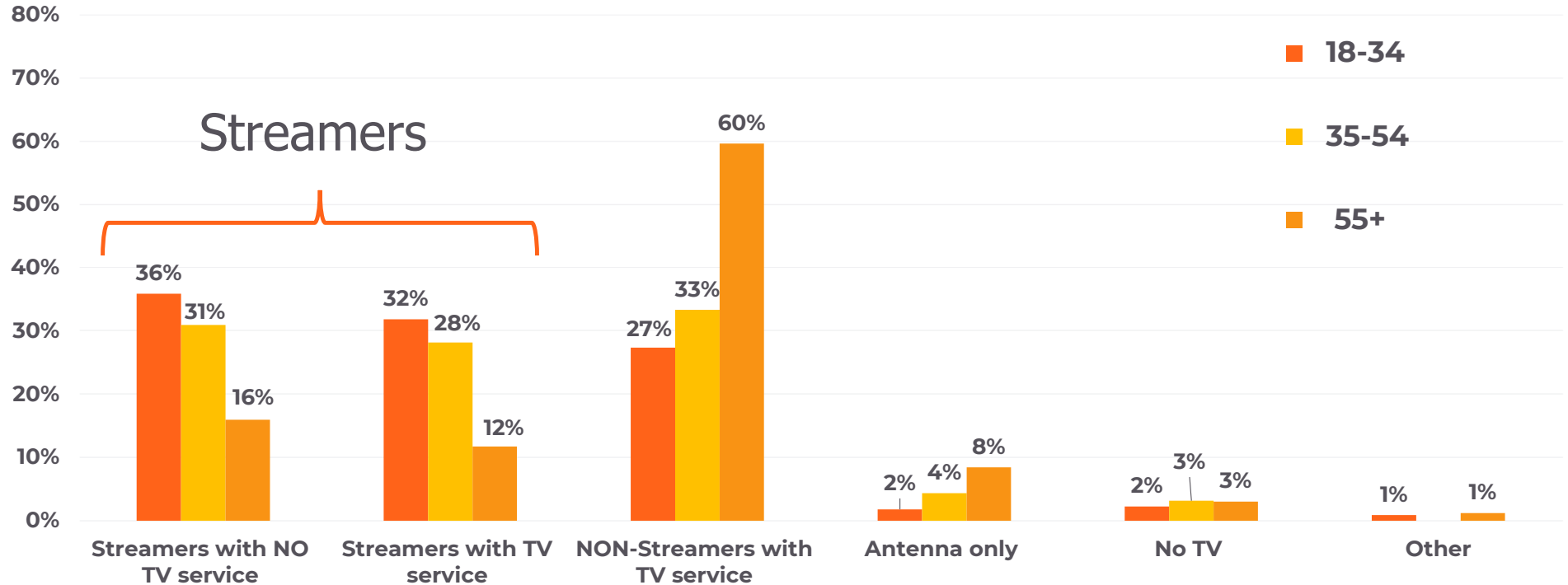
A Closer Look at Streamers

Q5. Which of the following describes how you receive television service in your home? (n=807)



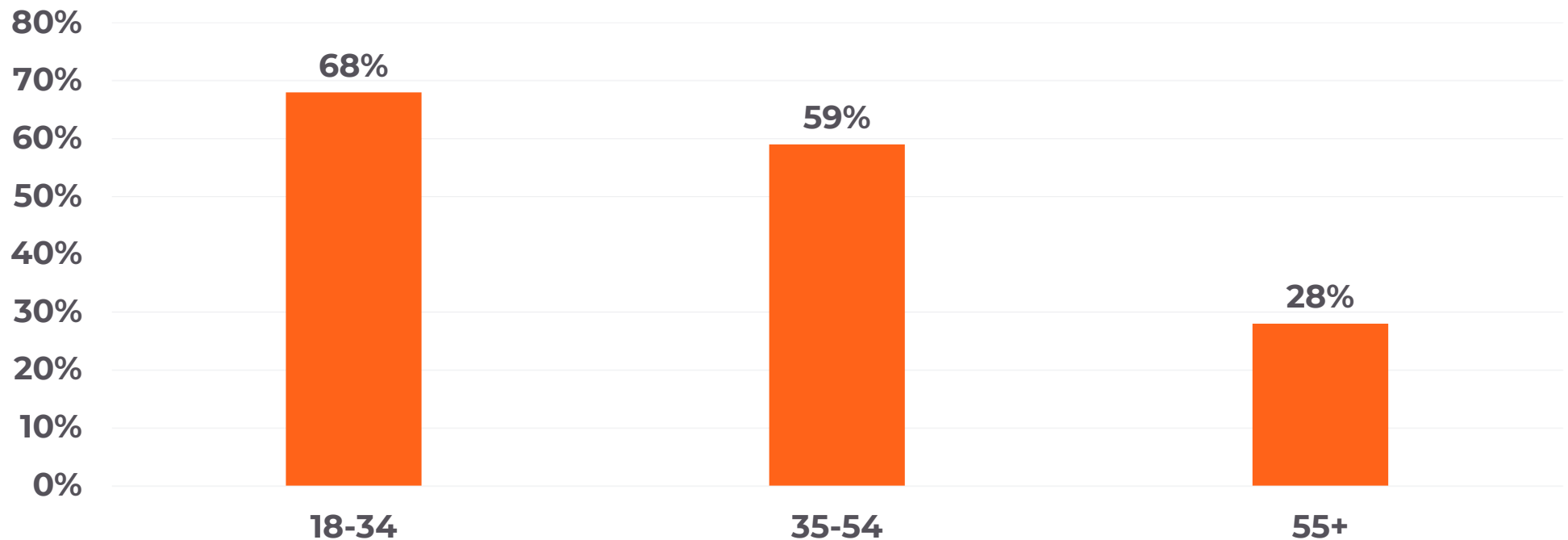
A Closer Look at Streamers – By Age

Q5. Which of the following describes how you receive television service in your home? (n=807)



Popularity of Streaming Seen in Age Breakdown

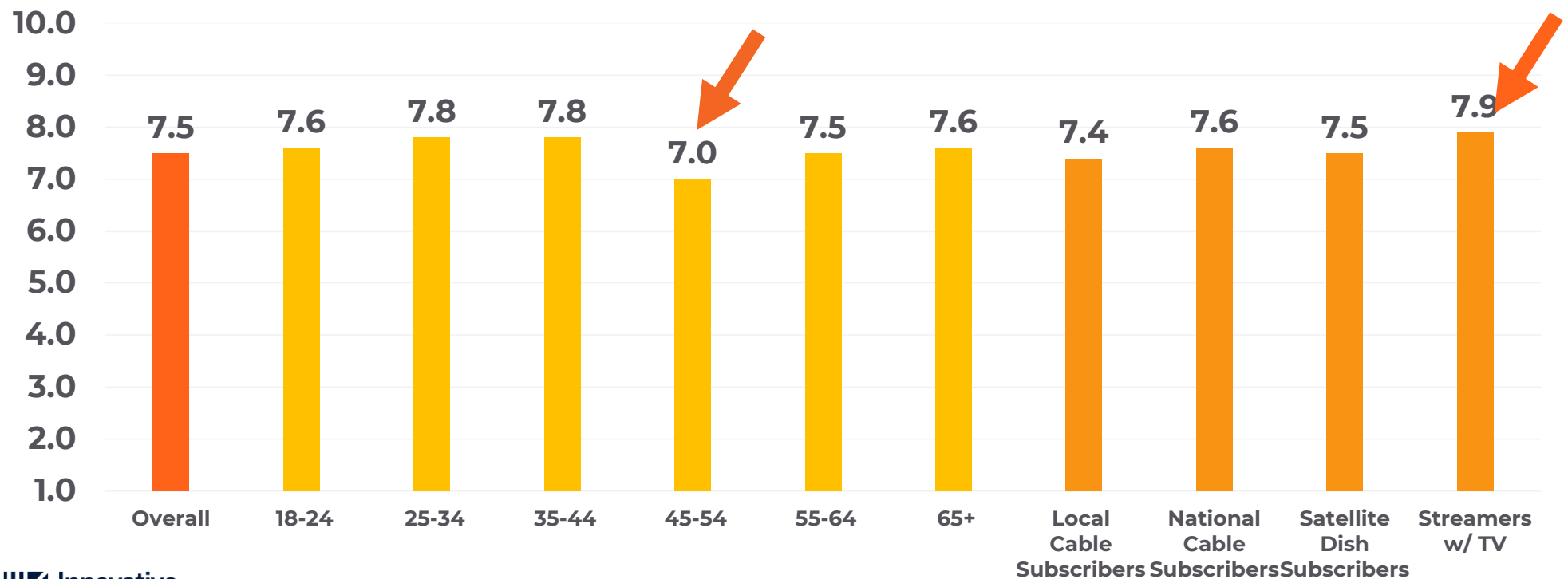
Percentage receiving TV via streaming (from Q5. Which of the following describes how you receive television service in your home?)



Satisfaction with TV Provider

Q6. Please rate your overall satisfaction with your television provider. (n=525)

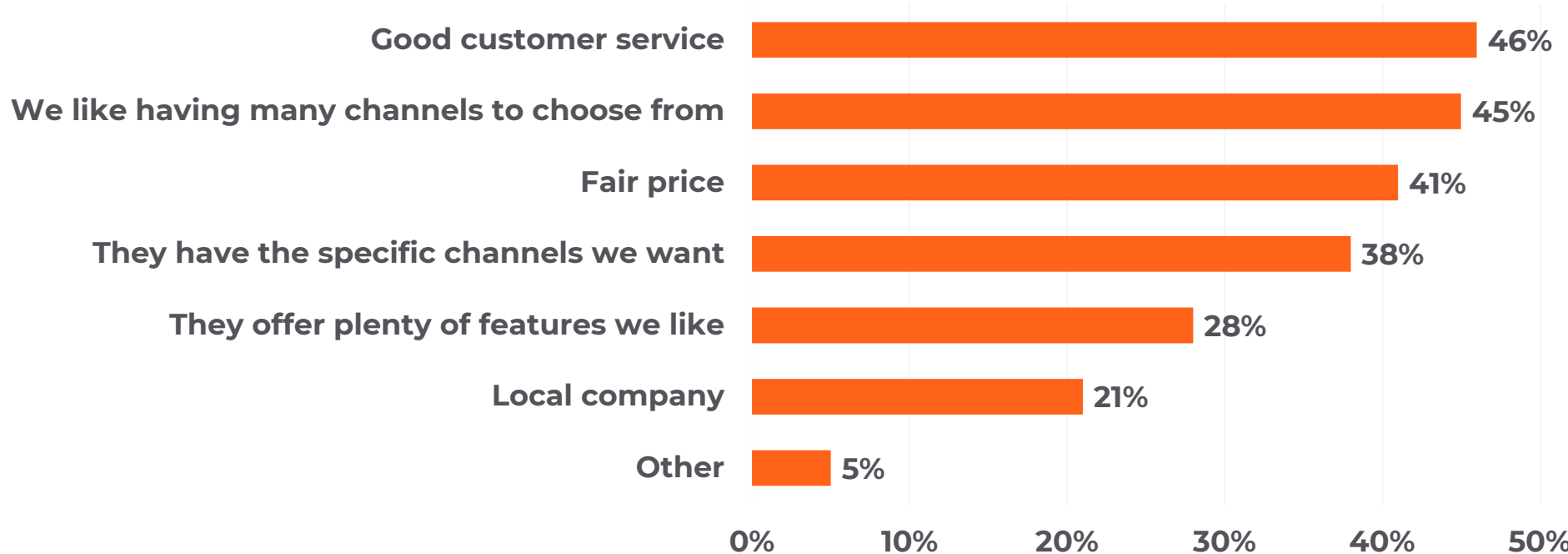
Note: 10 means completely satisfied and 1 means completely dissatisfied.



What's Driving High TV Satisfaction?

Q7. What has the greatest influence on your satisfaction with your TV provider? (**n=333**)

Asked of those who gave 8, 9, or 10 on TV Satisfaction. List was provided and respondent could select as many as applied.



What Are the Drivers for High TV Satisfaction?

Q7. What has the greatest influence on your satisfaction with your TV provider? **(n=333)**

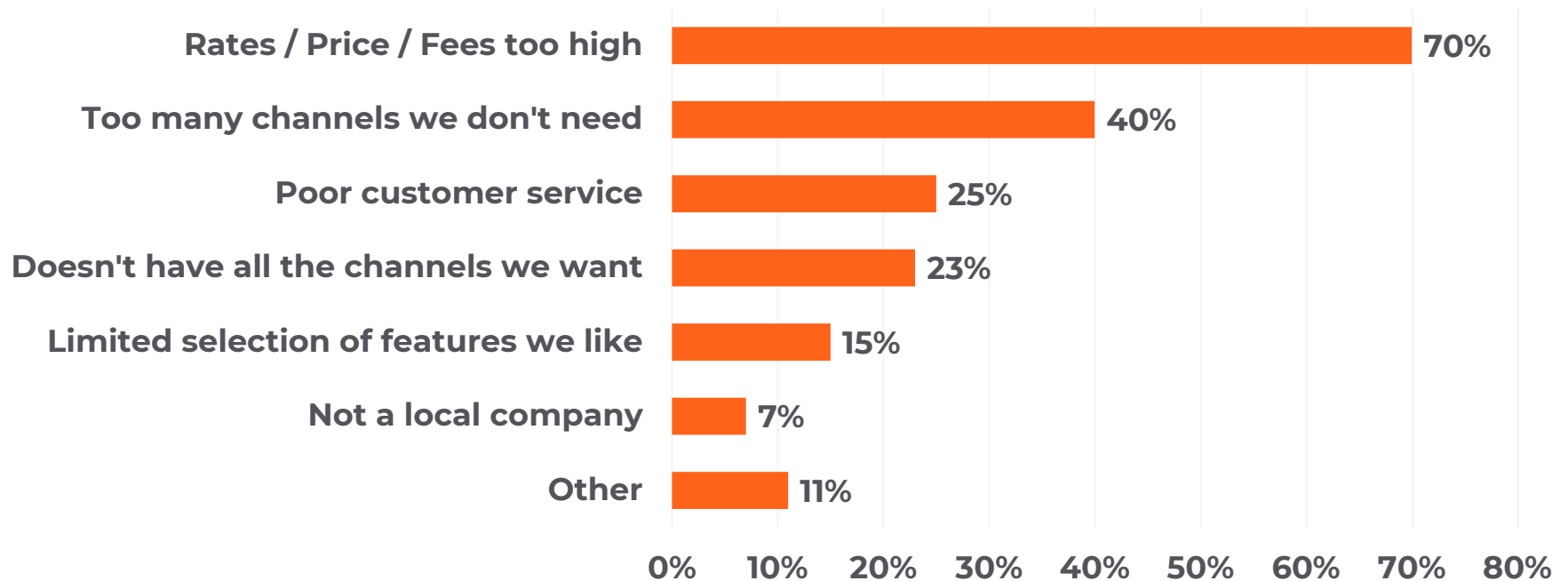
Asked of those who gave 8, 9, or 10 on TV Satisfaction.

	18-34	35-54	55+
Good customer service	49%	53%	39%
We like having many channels to choose from	45%	47%	43%
Fair price	56%	44%	30%
They have the specific channels we want	29%	33%	46%
They offer plenty of features we like	34%	26%	26%
Local company	19%	19%	32%

What Are the Drivers for Low TV Satisfaction?

Q8. What has the greatest influence on your satisfaction with your TV provider? **(n=188)**

Asked of those who gave 7 or lower on TV Satisfaction. List was provided and respondent could select as many as applied.



What Are the Drivers for Low TV Satisfaction?

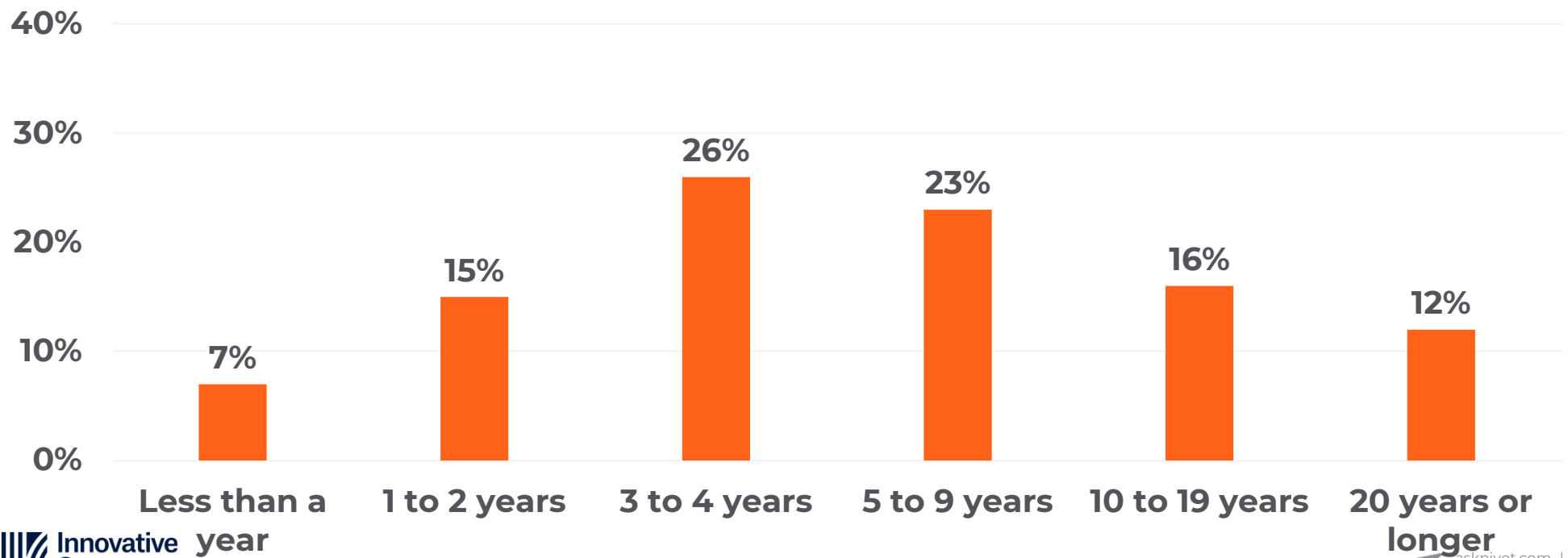
Q8. What has the greatest influence on your satisfaction with your TV provider? **(n=188)**

Asked of those who gave 7 or lower on TV Satisfaction.

	18-34	35-54	55+
Rates / Price / Fees too high	51%	72%	78%
Too many channels we don't need	36%	37%	45%
Poor customer service	18%	25%	29%
Doesn't have all the channels we want	29%	23%	20%
Limited selection of features we like	20%	16%	13%
Not a local company	13%	5%	6%

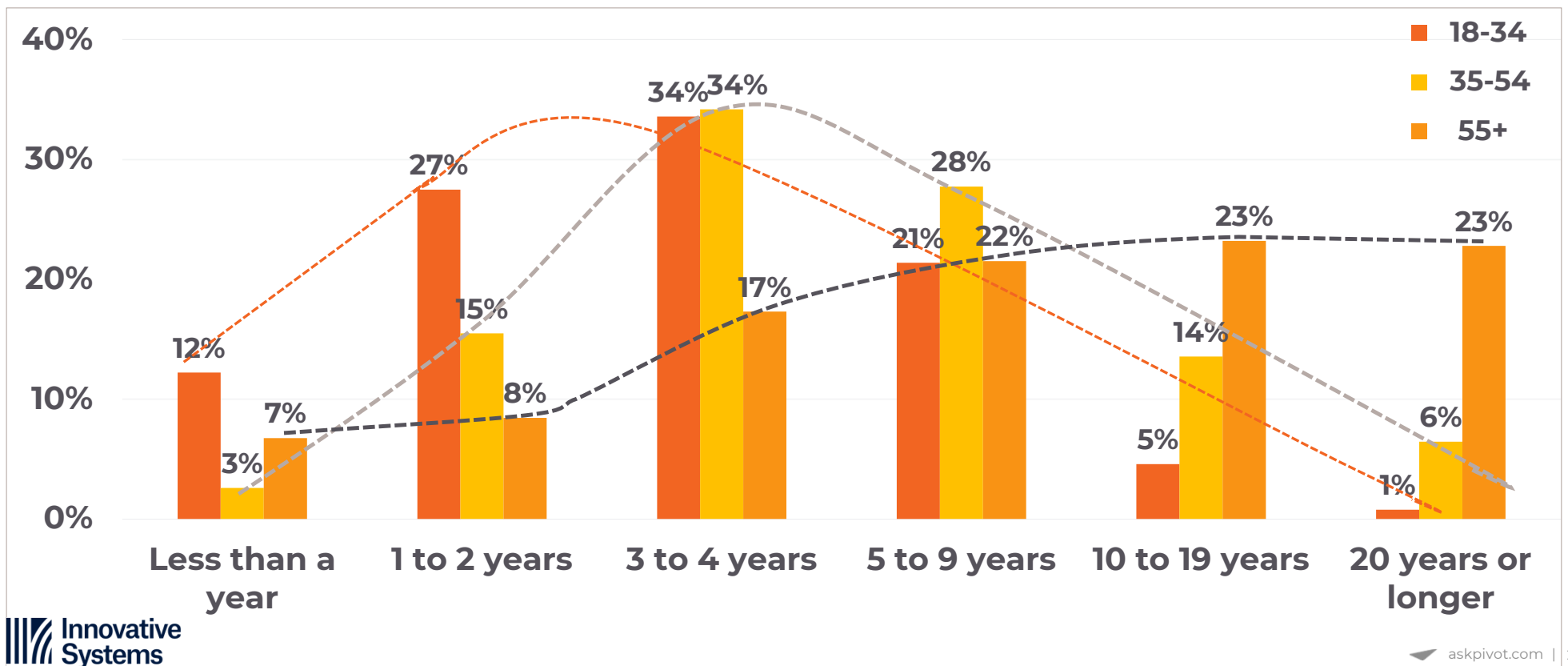
Tenure

Q9. How long have you had service from your current TV provider? (n=523)



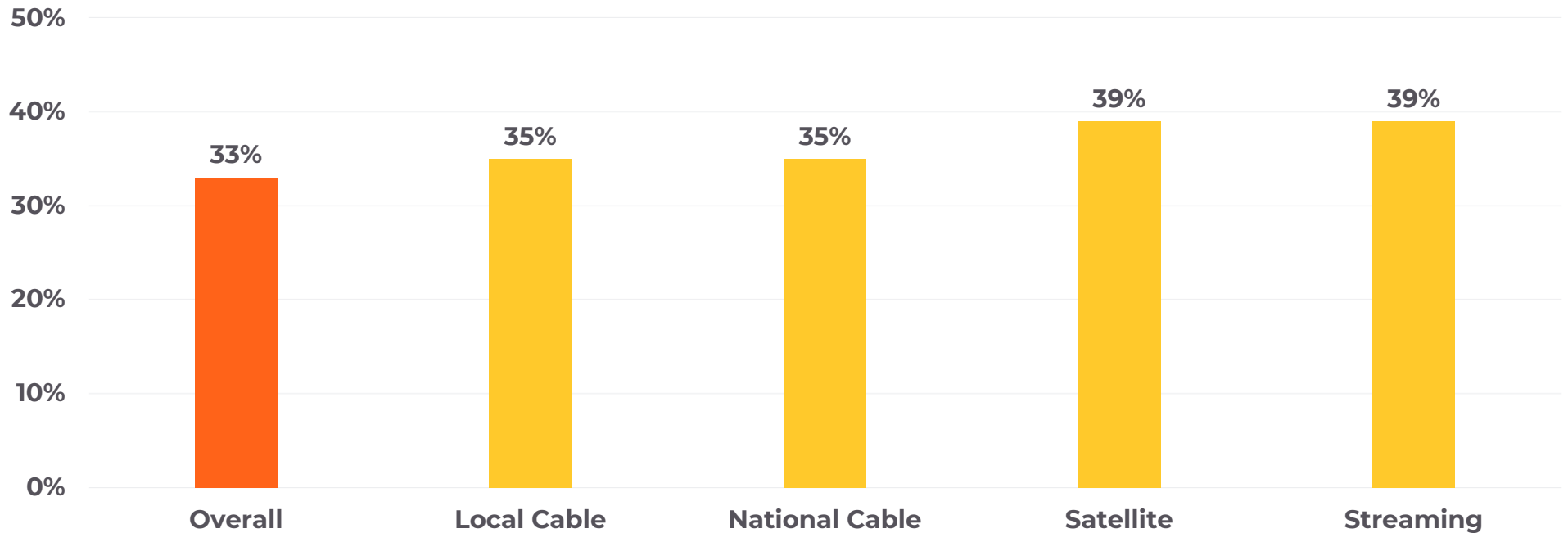
Tenure Based on Age

Q9. How long have you had service from your current TV provider? (n=523)



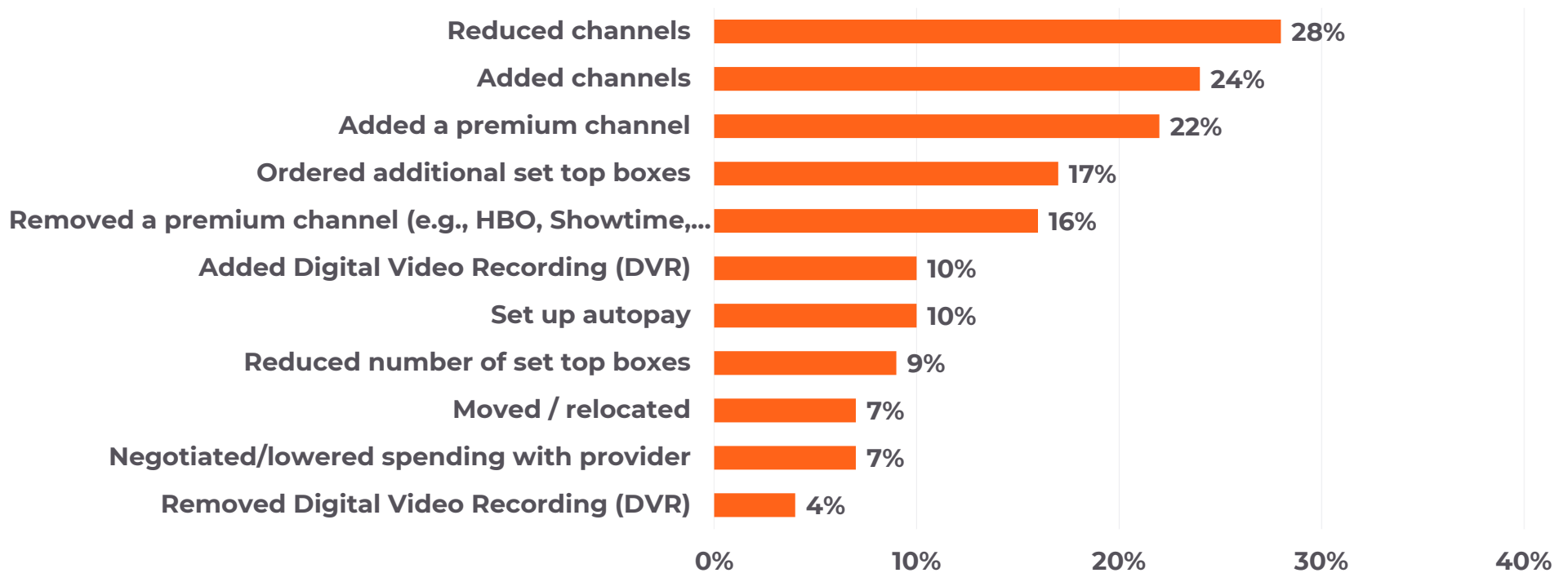
Contact with TV Provider in the Last Year (by Provider Type)

Q10. In the past 12 months, have you contacted your TV provider to make any changes to your TV service or account? **(n=501)** *percentage indicates those answering "yes".*



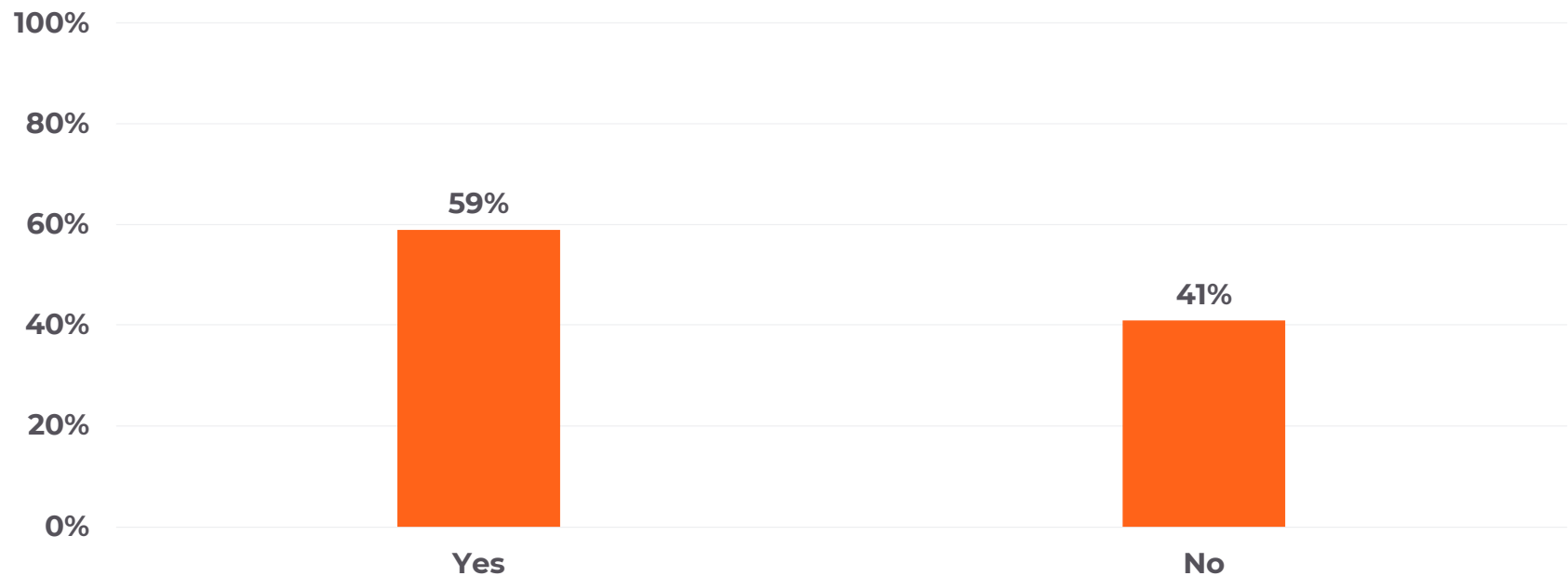
Type of Contact with TV Provider

Q11. What changes did you make? (**n=165**) *Asked of those who answered yes to Q10*



The Ability to Record Shows (DVR or other)

Q12. Do you currently have Digital Video Recording (DVR) or the ability to record TV programs? **(n=500)**



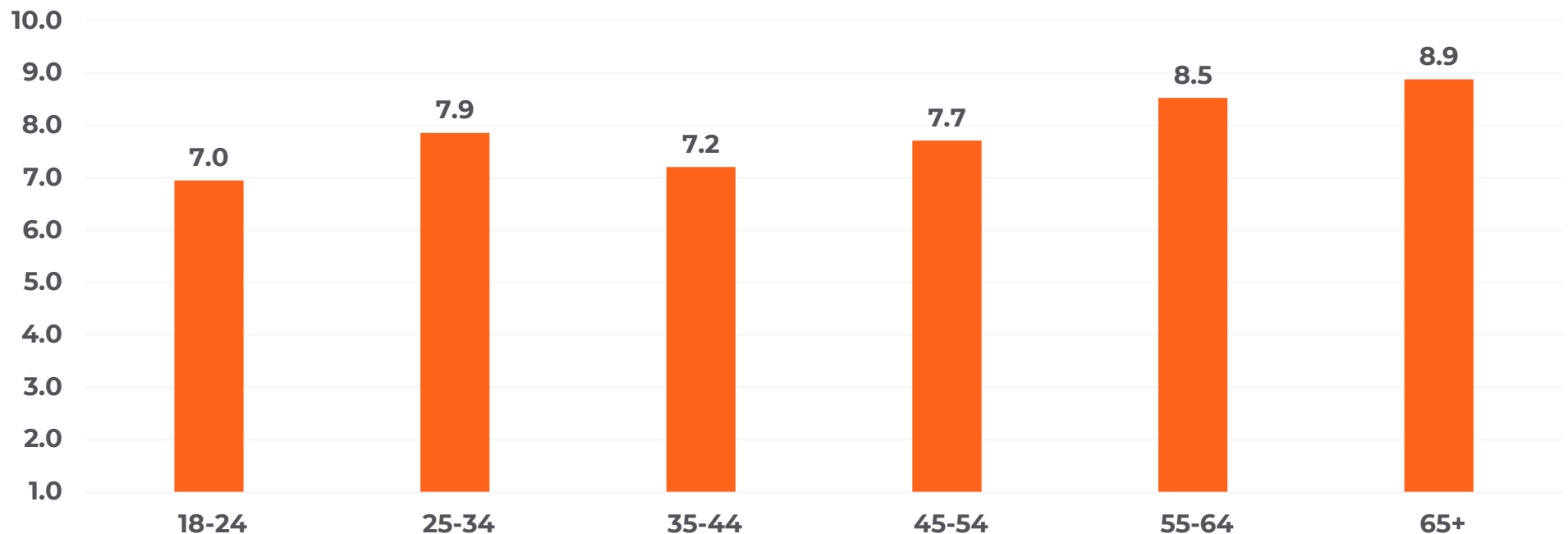
The Ability to Record Shows (DVR or other)

Q12. Do you currently have Digital Video Recording (DVR) or the ability to record TV programs? **(n=500)** *Percentage indicates those answering yes.*



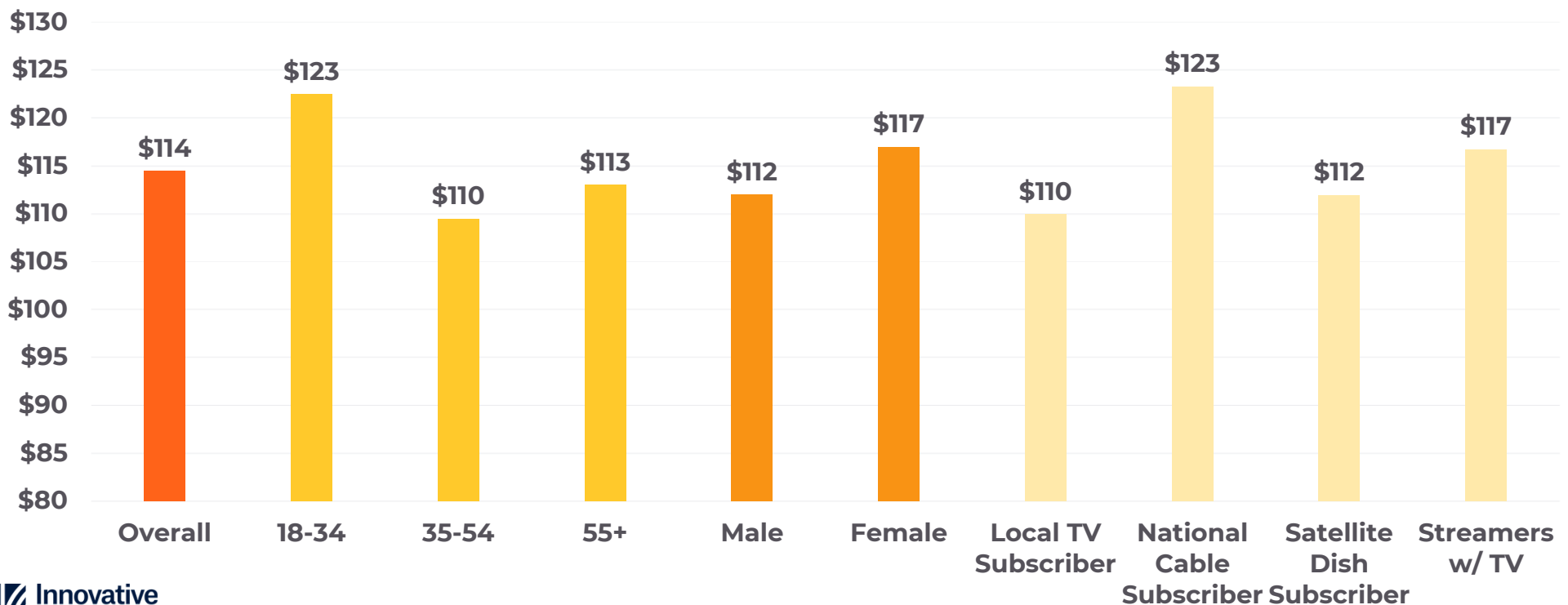
The Importance of Local Programming

Q13. How important is it for your household to have channels with local news, weather and sports? (n=522)



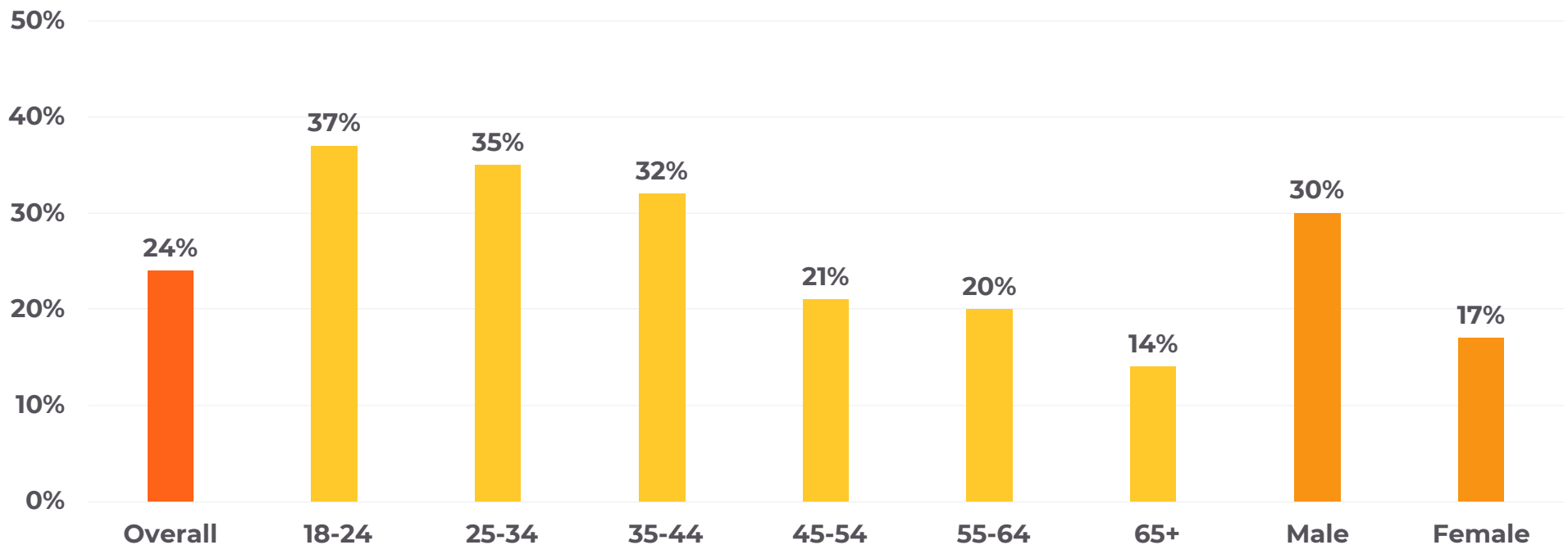
Average Spend on TV

Q14. How much is your monthly television bill, NOT including any streaming services such as Netflix, Amazon Prime, Hulu? **(n=436)**



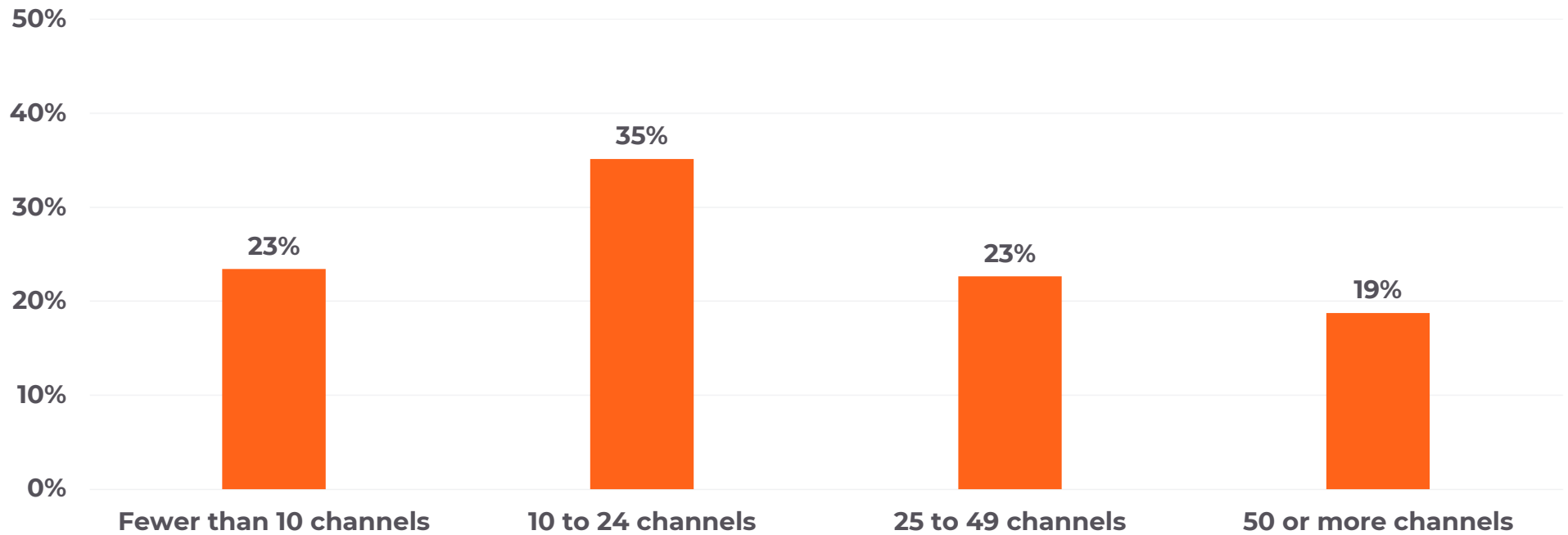
How Much Sports is Being Watched?

Q15. Approximately what percentage of your household's television viewing is sporting events? (n=459)



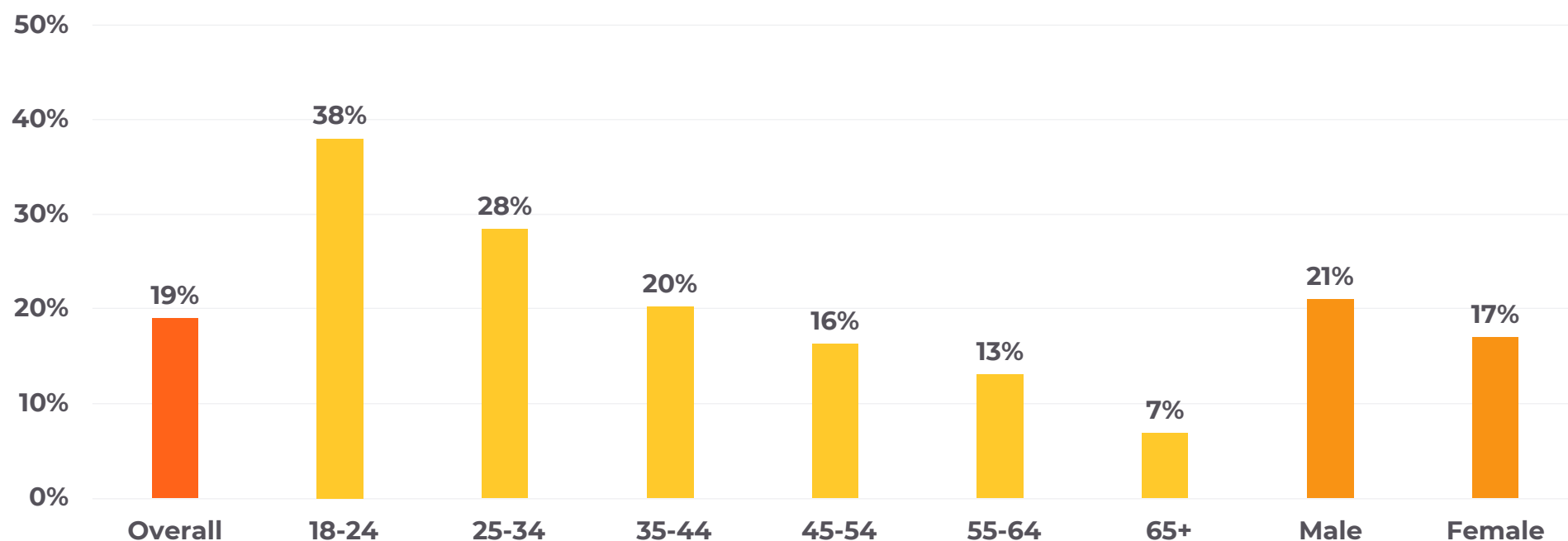
Availability of Channels via Antenna

Q16. How many channels do you receive using your antenna? (n=128)



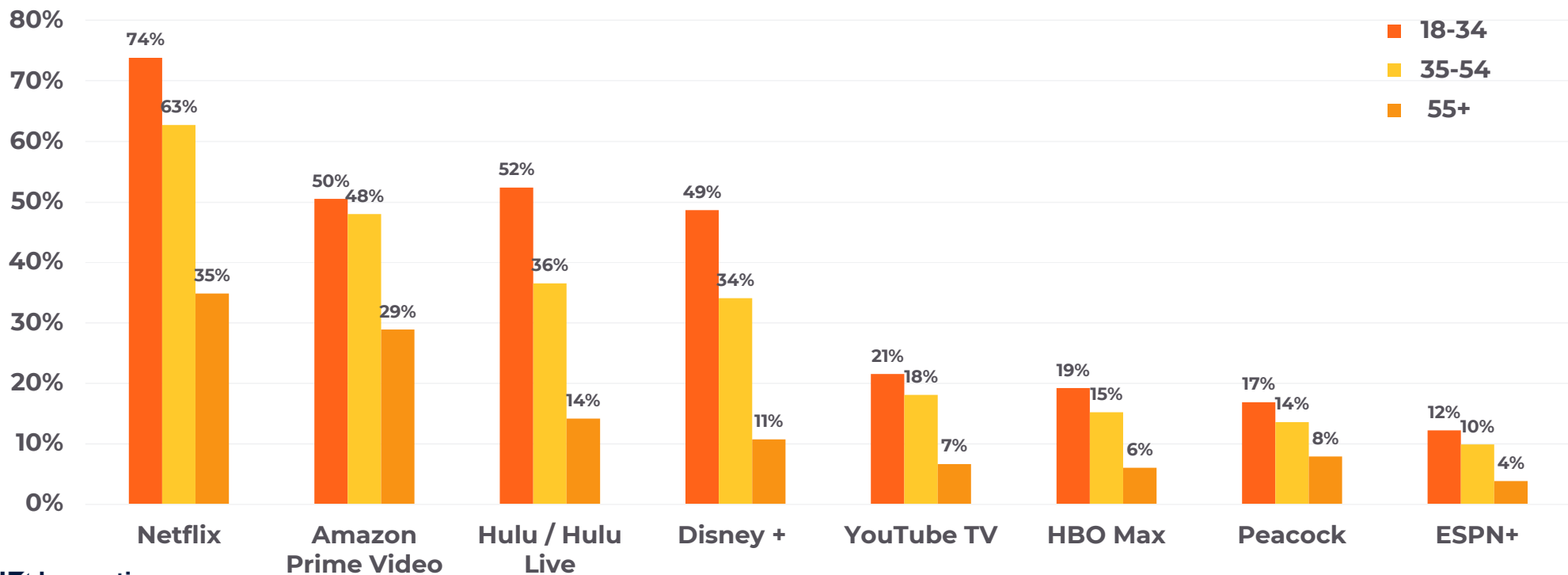
Non-Antenna Users: Can You Get Enough Channels?

Q17. If you were to use an antenna, do you think you would get enough channels to meet the TV viewing needs of your household? **(n=651)** *Percentage indicates those answering yes.*



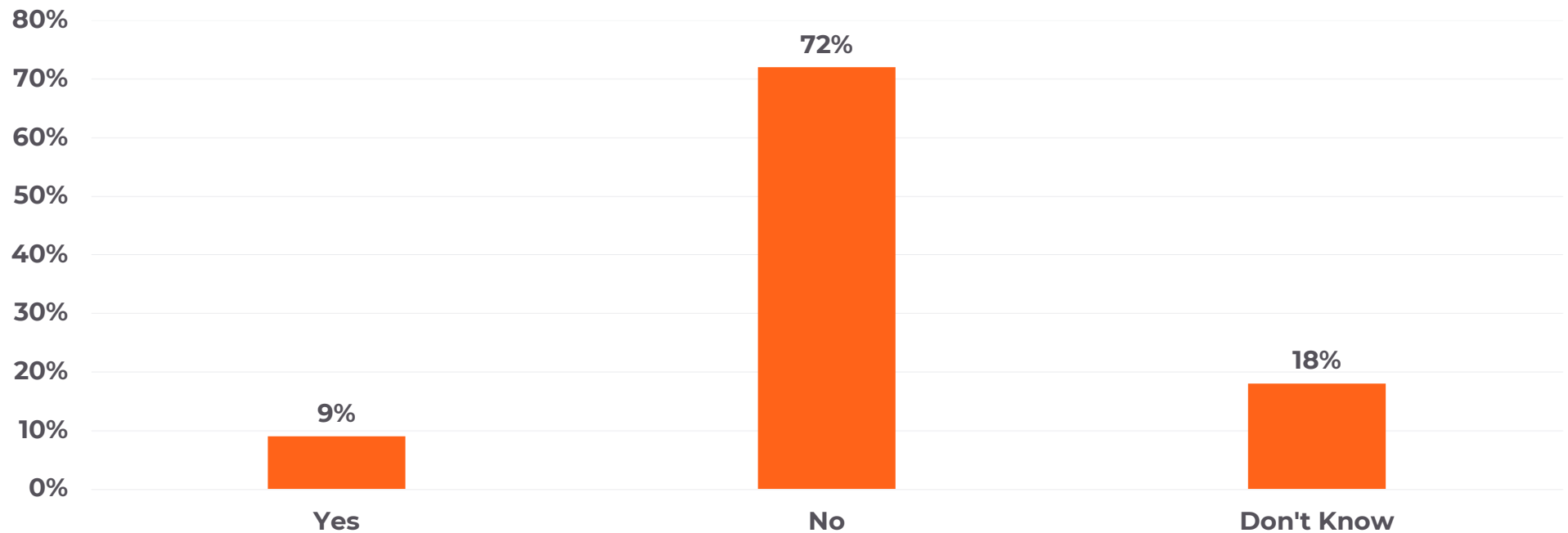
Most Popular Streaming Services – By Age

Q18. Which of the following streaming services, if any, do you subscribe to? (n=777)



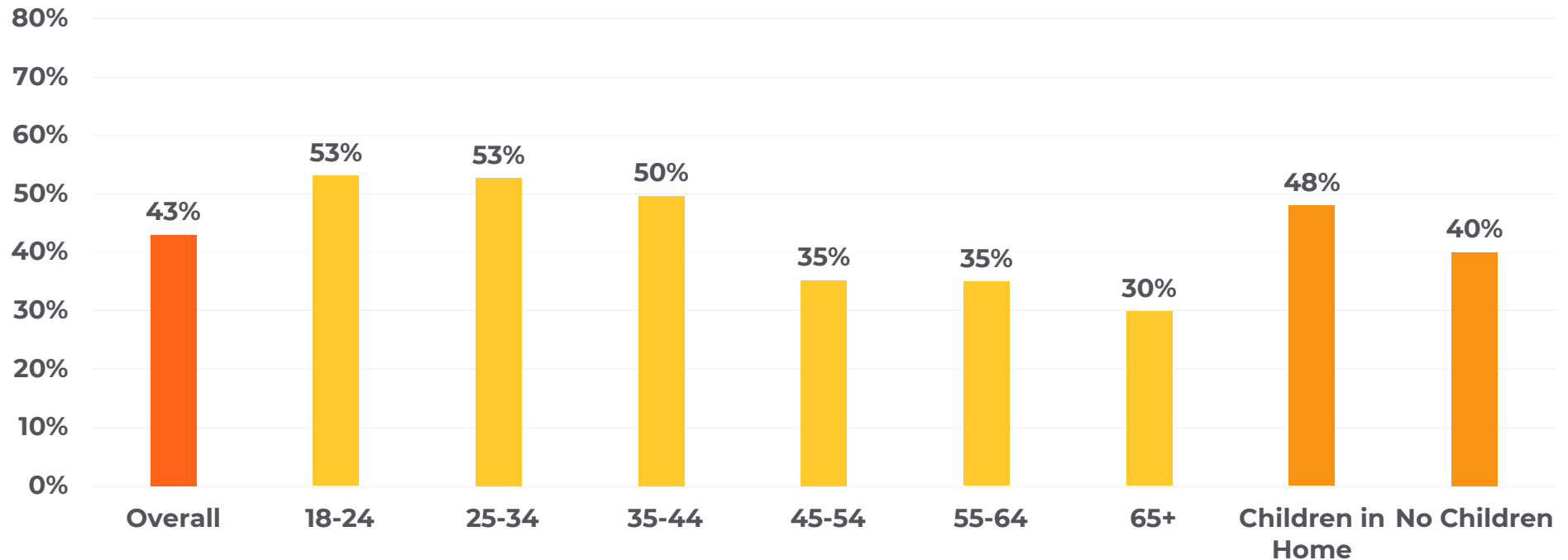
Adding Streaming Services in the Next 12 Months?

Q19. Do you plan to subscribe to any of these streaming services in the next 12 months?
(n=190)



How Much Streaming vs Traditional TV Content?

Q20. Approximately what percentage of your household's total television viewing is streaming? (n=271)



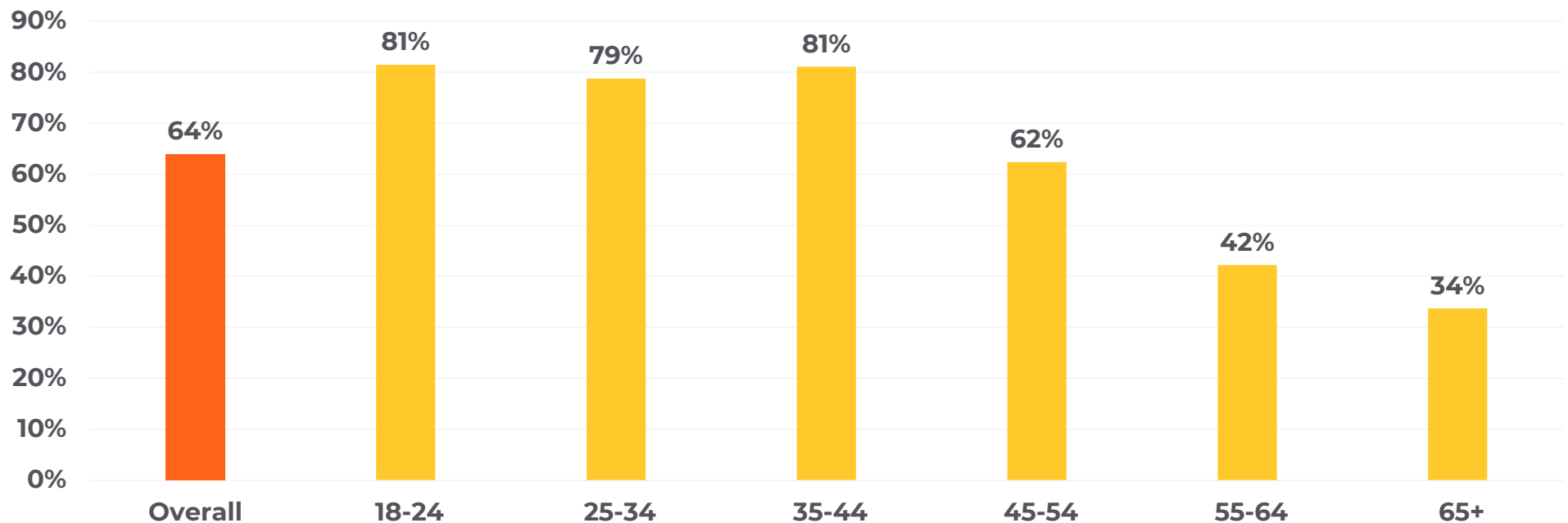
Spending on Streaming Services by Age

Q21. Approximately how much per month, in total, do you spend on streaming services?
(n=487)



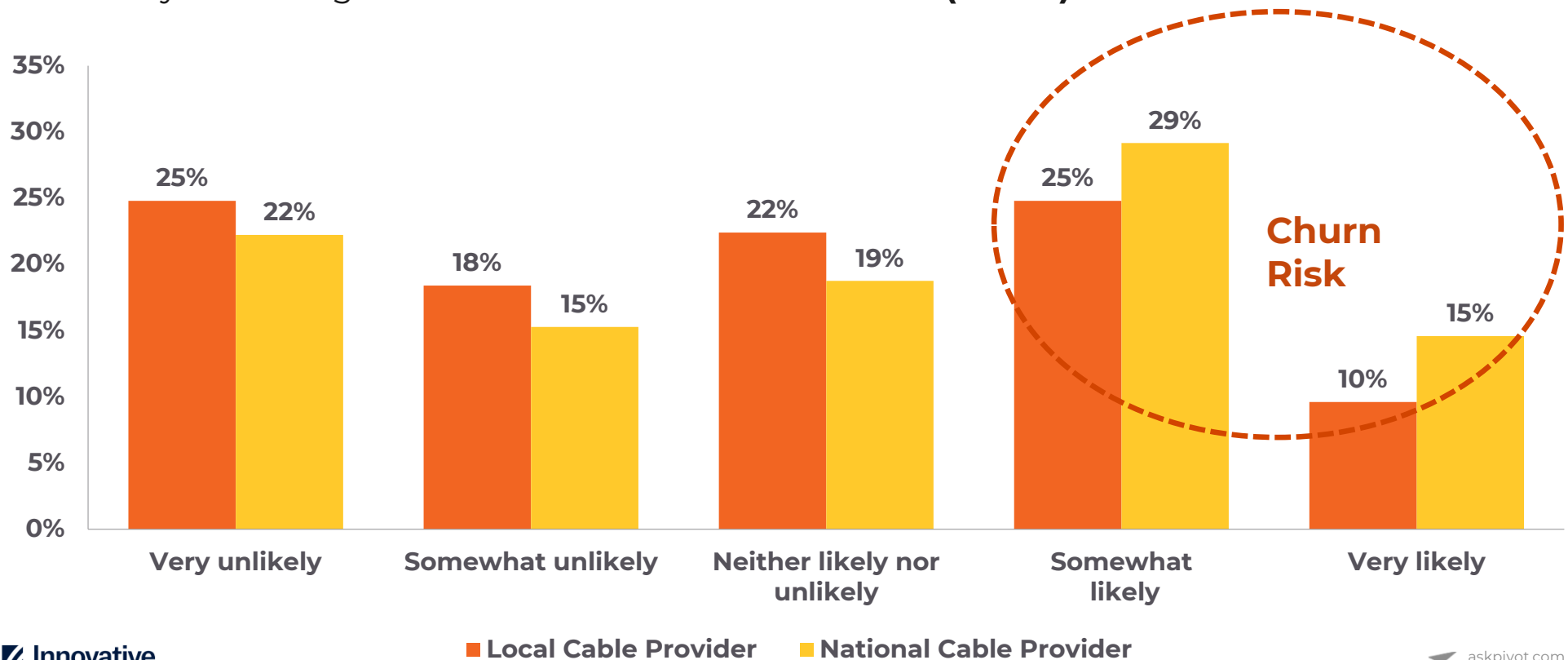
Use of Mobile Device for Streaming

Q22. Does your household ever stream video or watch live television programs on a mobile device, such as a laptop, iPad or smartphone? **(n=387)** *Percentage indicates those answering yes.*



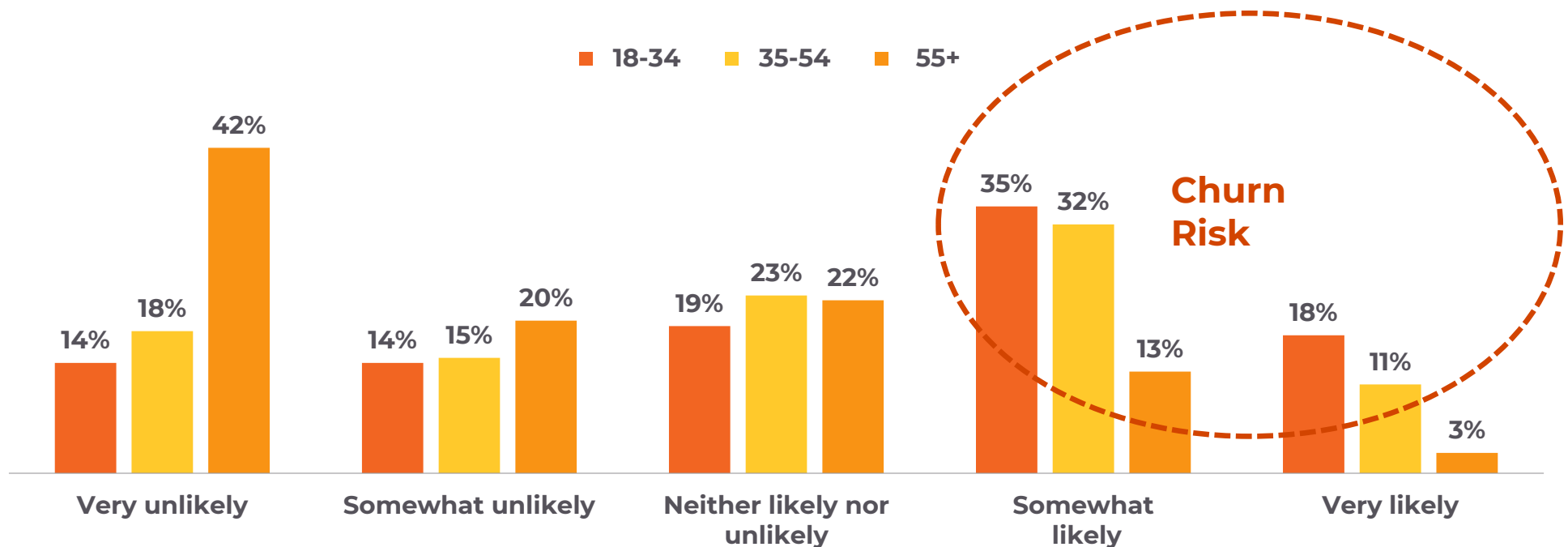
Likelihood to Switch to Streaming Only

Q23. Which of the following describes your likelihood to switch away from cable TV and use only streaming services within the next 12 months? (n=247)



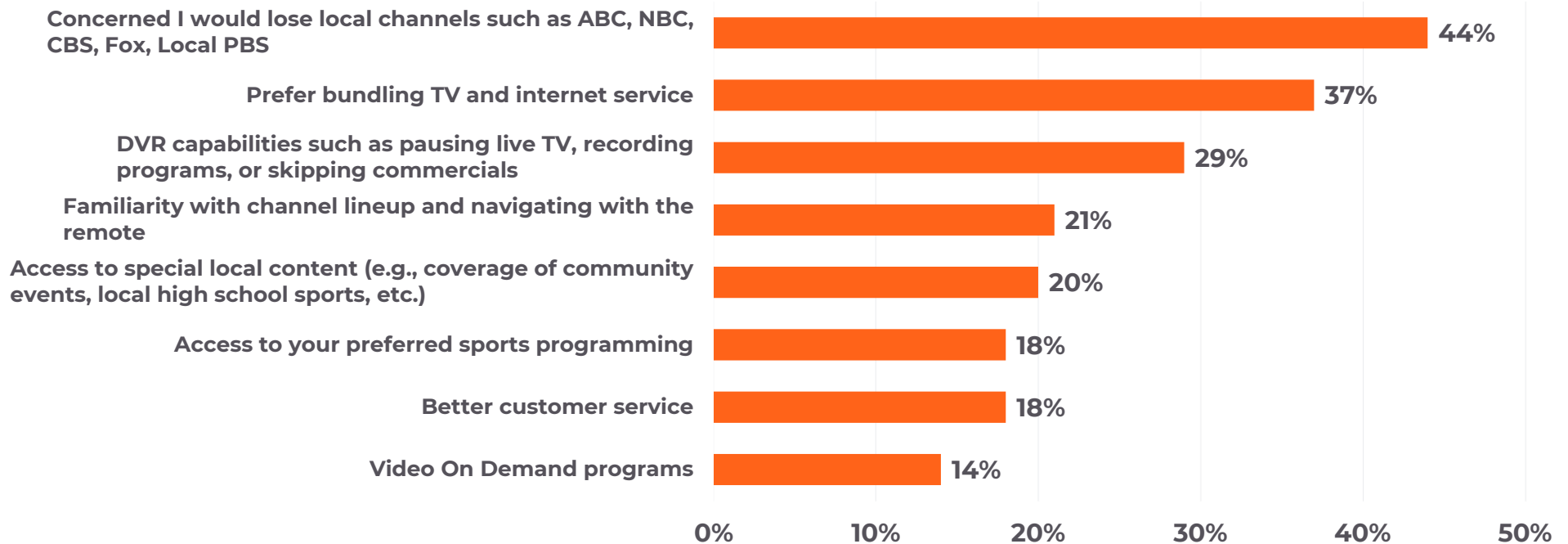
Likelihood to Switch to Streaming Only – By Age

Q23. Which of the following describes your likelihood to switch away from cable TV and use only streaming services within the next 12 months? (n=247)



Top Reasons for Staying With Current TV Provider

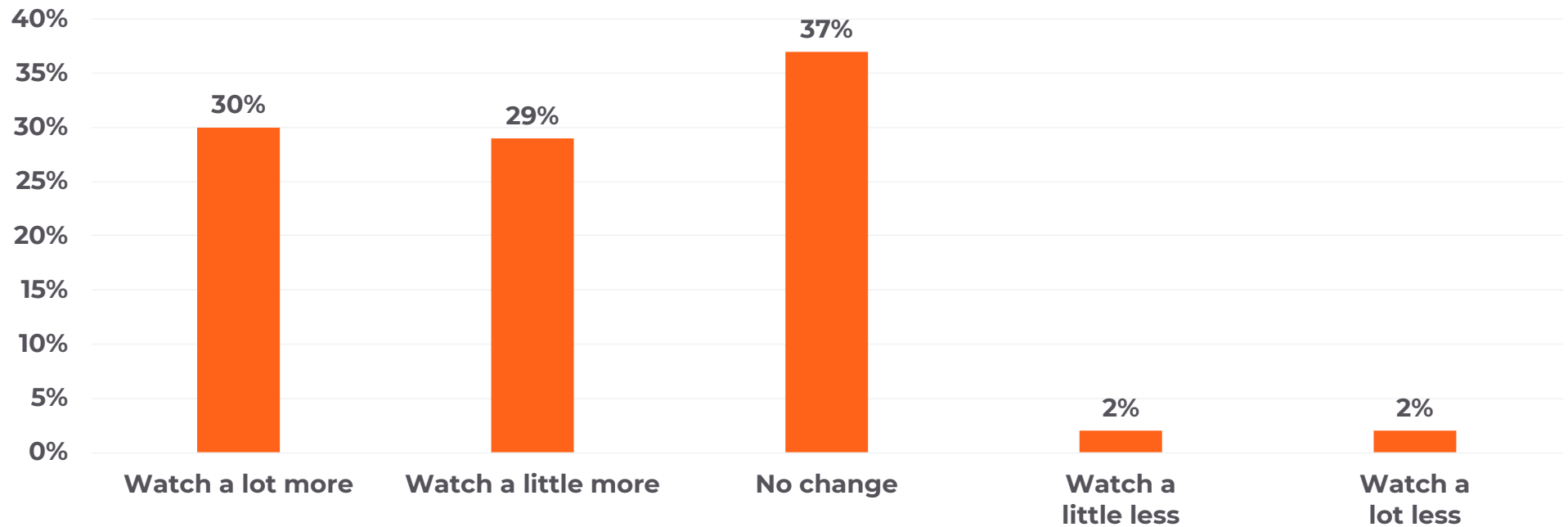
Q24. What are the top reasons you prefer keeping your TV service instead of switching to streaming only? (n=153)



Significant Increase in TV Viewing

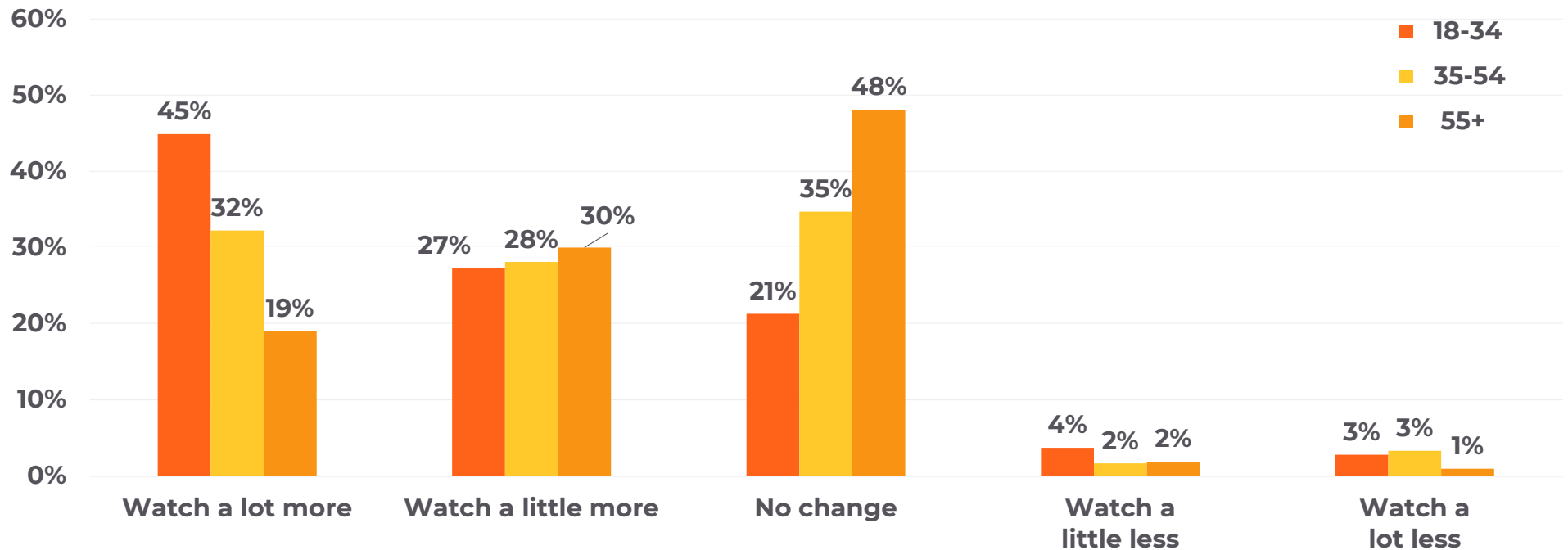
Q25. How has the pandemic affected your TV and video watching? (**n=778**)

Note: Please note that this is the respondent's opinion, not based on the provider's actual measure.

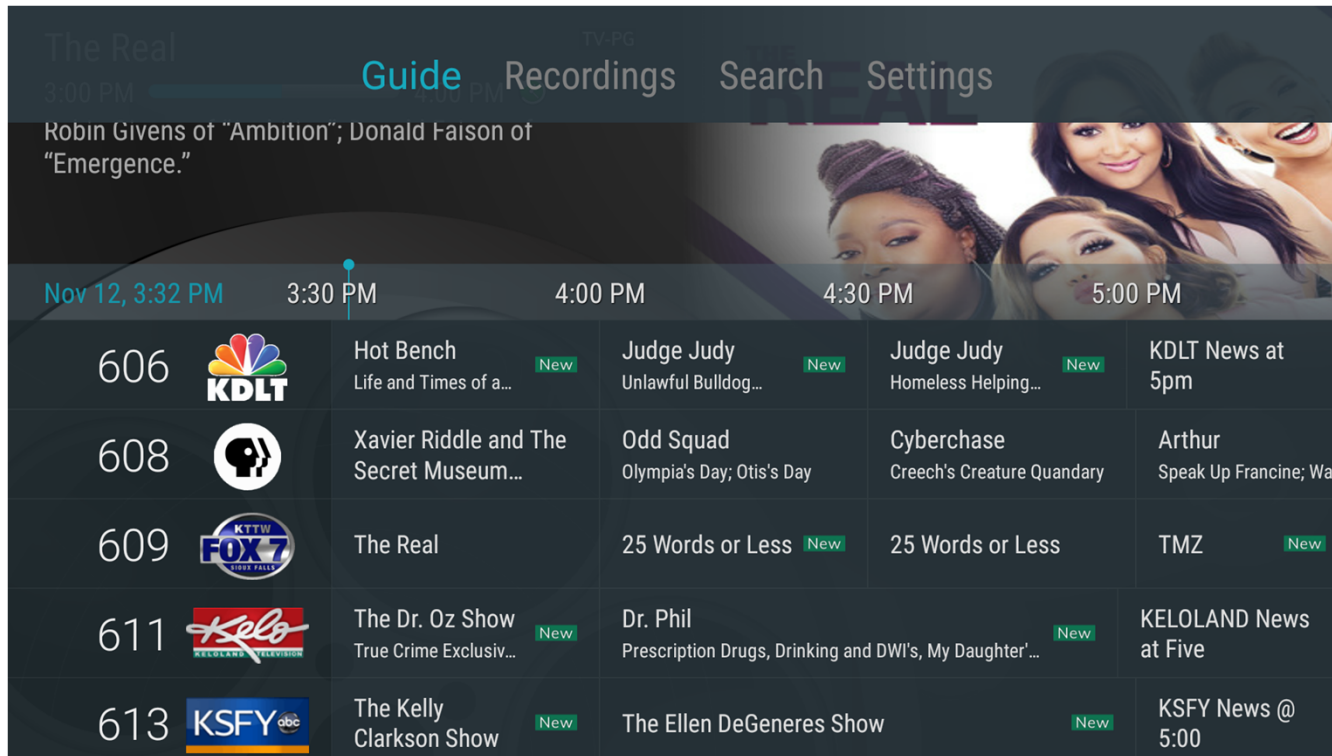


Significant Increase in TV Viewing – By Age

Q25. How has the pandemic affected your TV and video watching? (n=778)



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IPTV or STB-Free Live Streaming – Let Customers Choose What Best Fits Their Lifestyle

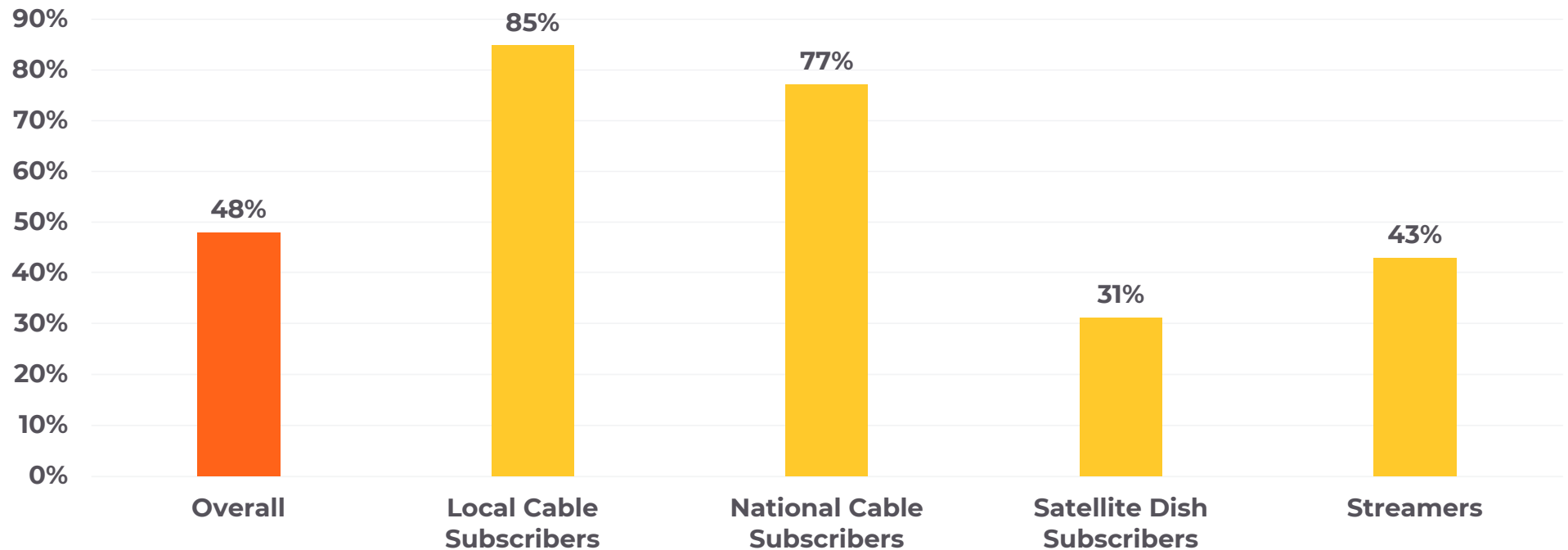
Broadband



Same Internet Provider for Many

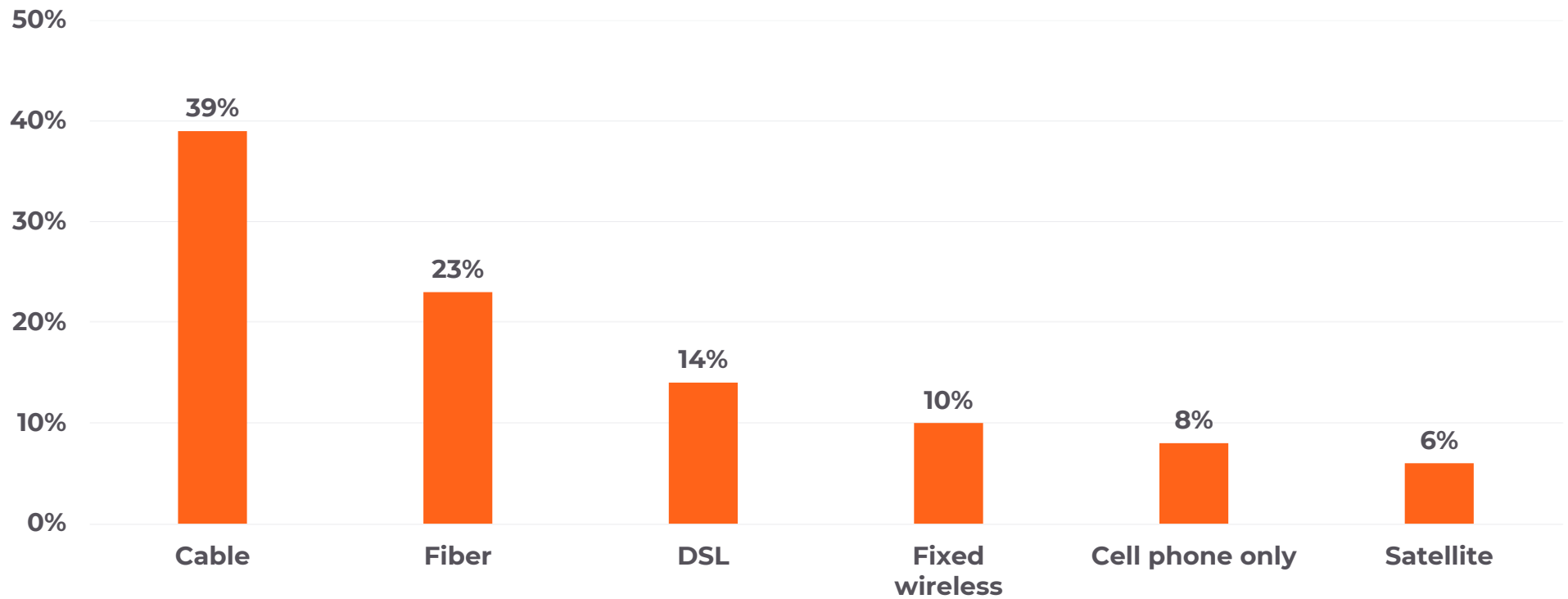
Q26. For internet, do you use the same company you use for TV service? **(n=803)**

Percentage indicates those answering "yes"



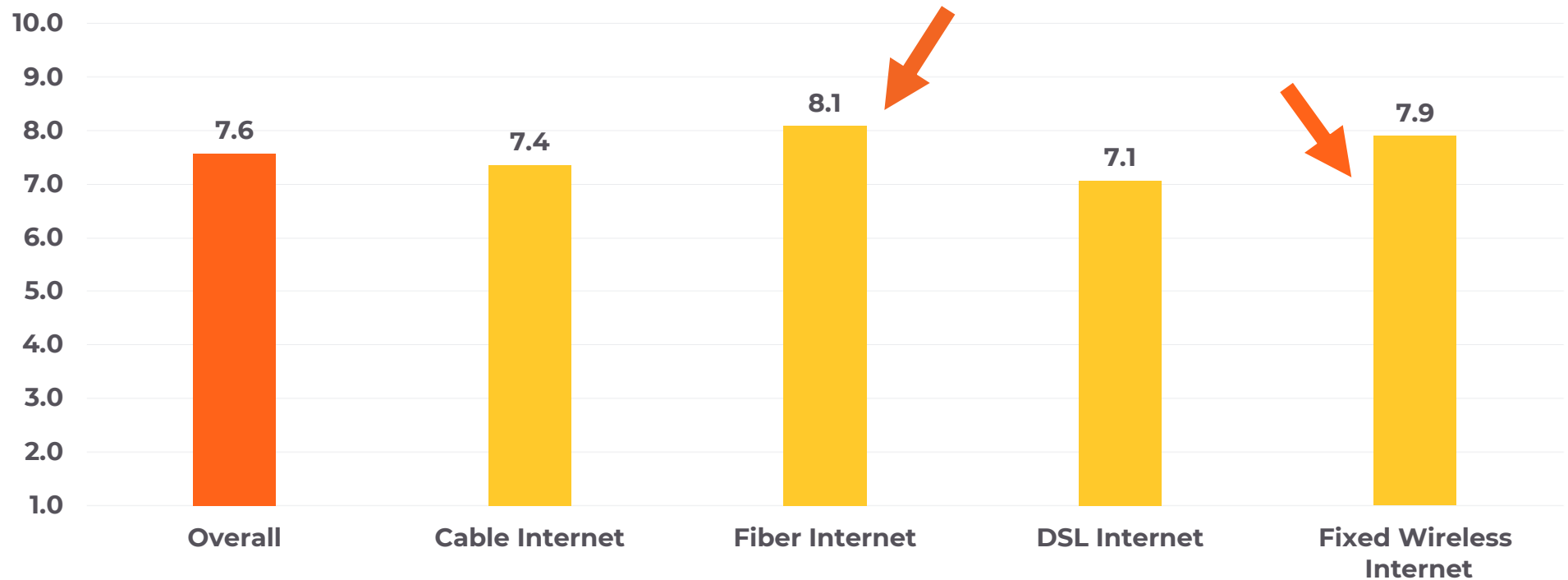
How Are You Receiving Internet Service?

Q27. Which of the following best describes how internet is delivered to your home? (n=756)



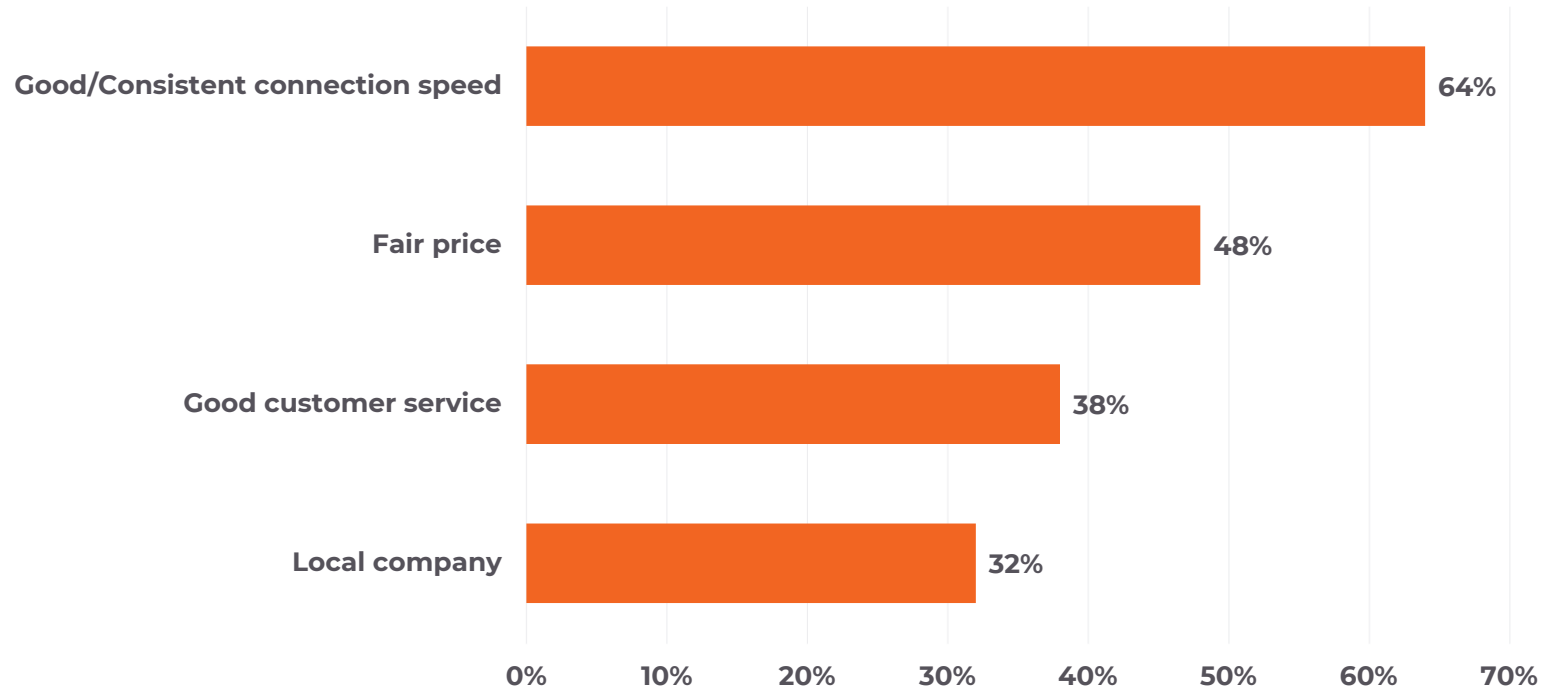
Satisfaction with Internet Provider

Q28. Please rate your overall satisfaction with your internet provider. (n=738)



What Are the Drivers for High Internet Satisfaction?

Q29. What has the greatest influence on your satisfaction? (**n=462**) *Asked of those who gave 8, 9, or 10 on Internet Satisfaction. List was provided and respondent could select as many as applied.*



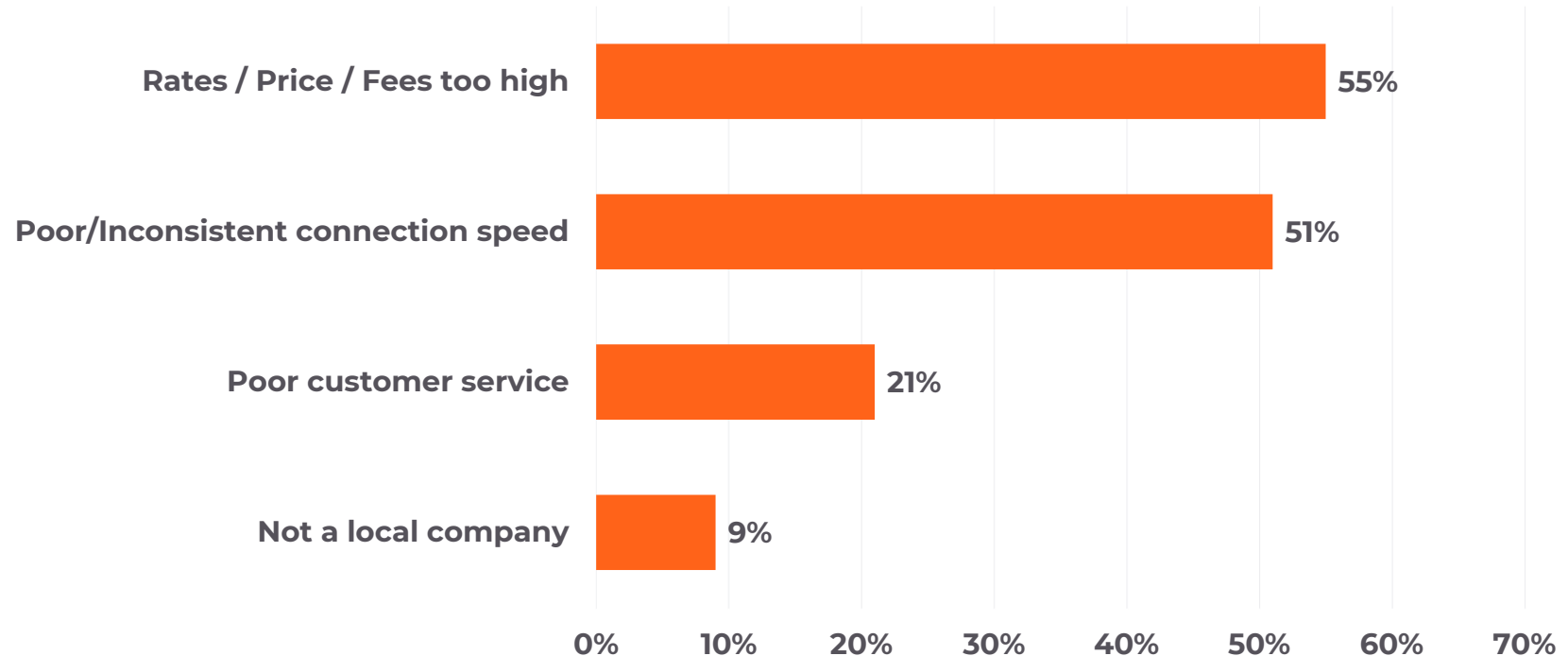
What Are the Drivers for High Internet Satisfaction?

Q29. What has the greatest influence on your satisfaction? (**n=462**) *Asked of those who gave 8, 9, or 10 on Internet Satisfaction.*

	18-34	35-54	55+
Good/Consistent connection speed	58%	66%	67%
Fair price	60%	50%	41%
Good customer service	37%	42%	36%
Local company	25%	34%	35%

What Are the Drivers for Low Internet Satisfaction?

Q30. What keeps you from giving a higher rating? (**n=270**) *Asked of those who gave 7 or lower on Internet Satisfaction. List was provided and respondent could select as many as applied.*



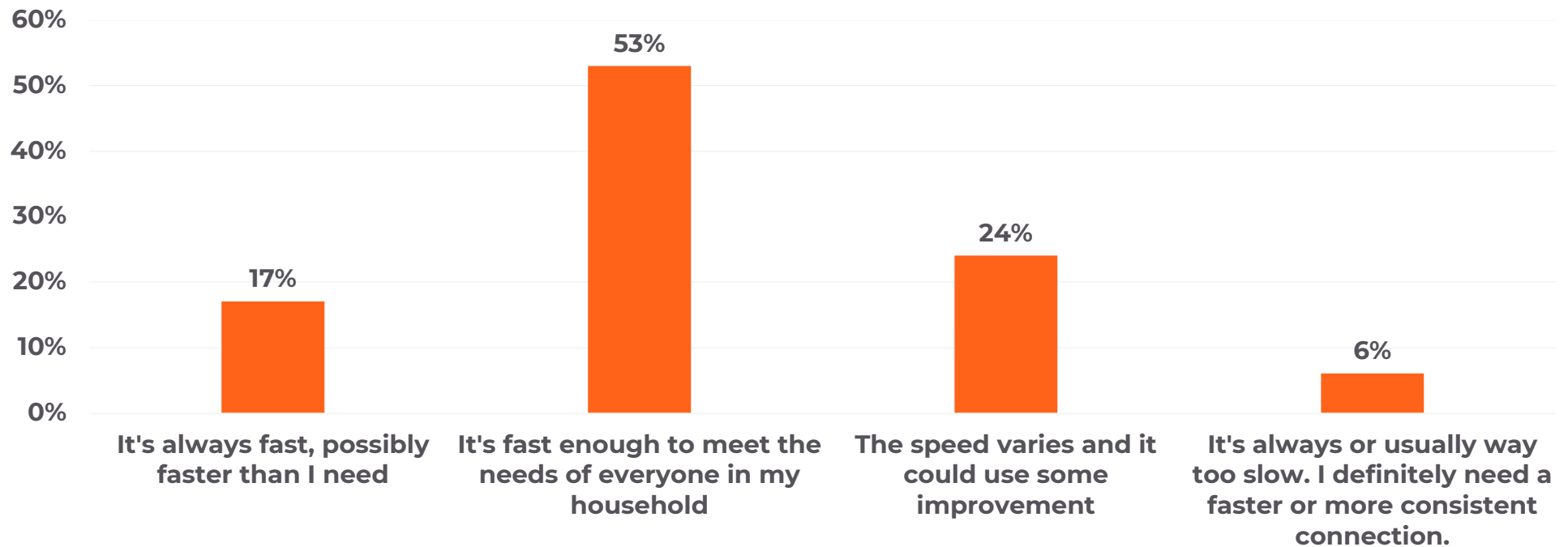
What Are the Drivers for Low Internet Satisfaction?

Q30. What keeps you from giving a higher rating? **(n=270)** Asked of those who gave 7 or lower on Internet Satisfaction. List was provided and respondent could select as many as applied.

	18-34	35-54	55+
Rates / Price / Fees too high	39%	54%	67%
Poor / Inconsistent connection speed	53%	53%	47%
Poor customer service	21%	17%	24%
Not a local company	8%	11%	7%

Opinions on Home Internet Speed

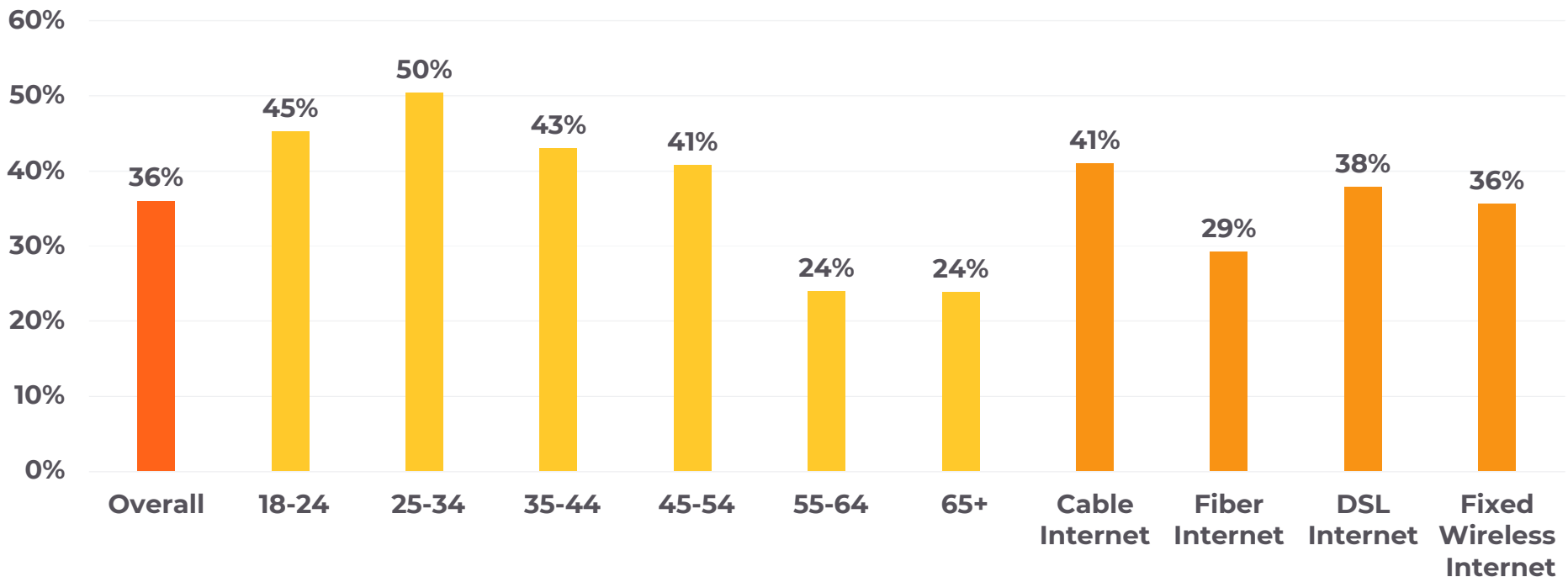
Q31. Which one of the following best describes your opinion about your home internet speed? (n=737)



Interest in a Free Trial

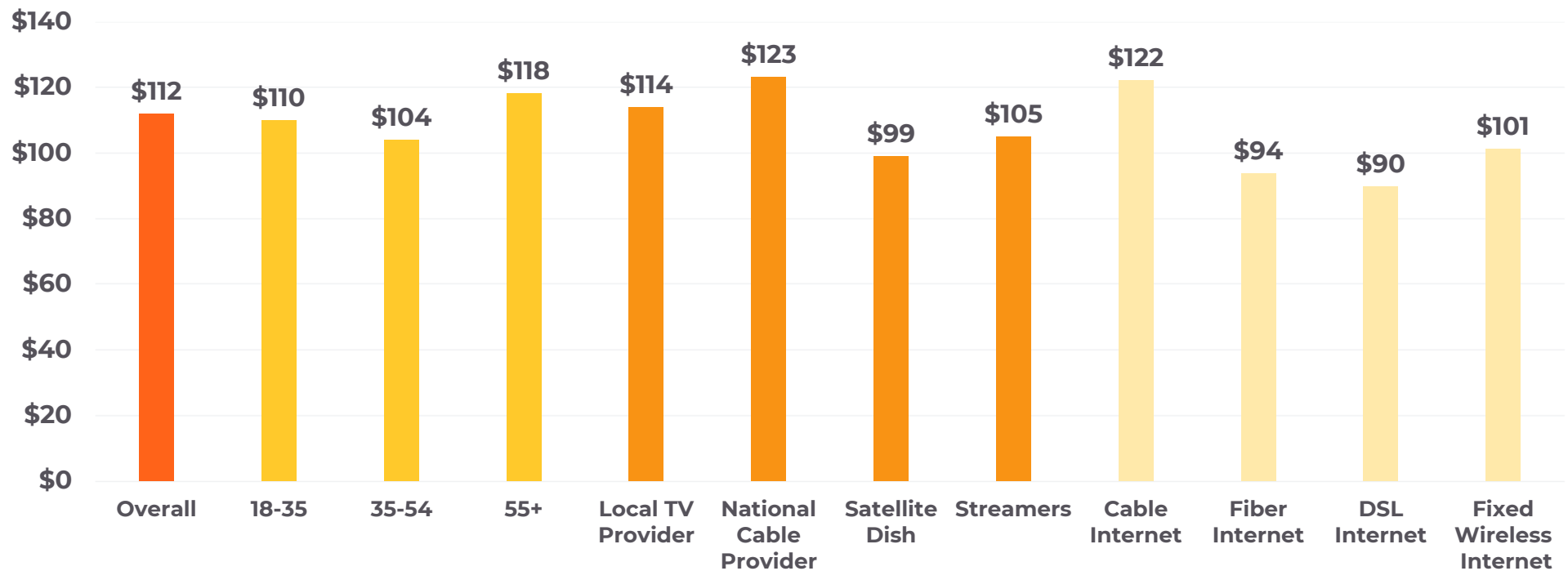
Q32. Would you be interested in a free trial of a faster internet speed for one month to see how it impacts your online experience? (**n=738**) *percentage indicates those answering*

Yes
Note: 23% said "Don't Know."



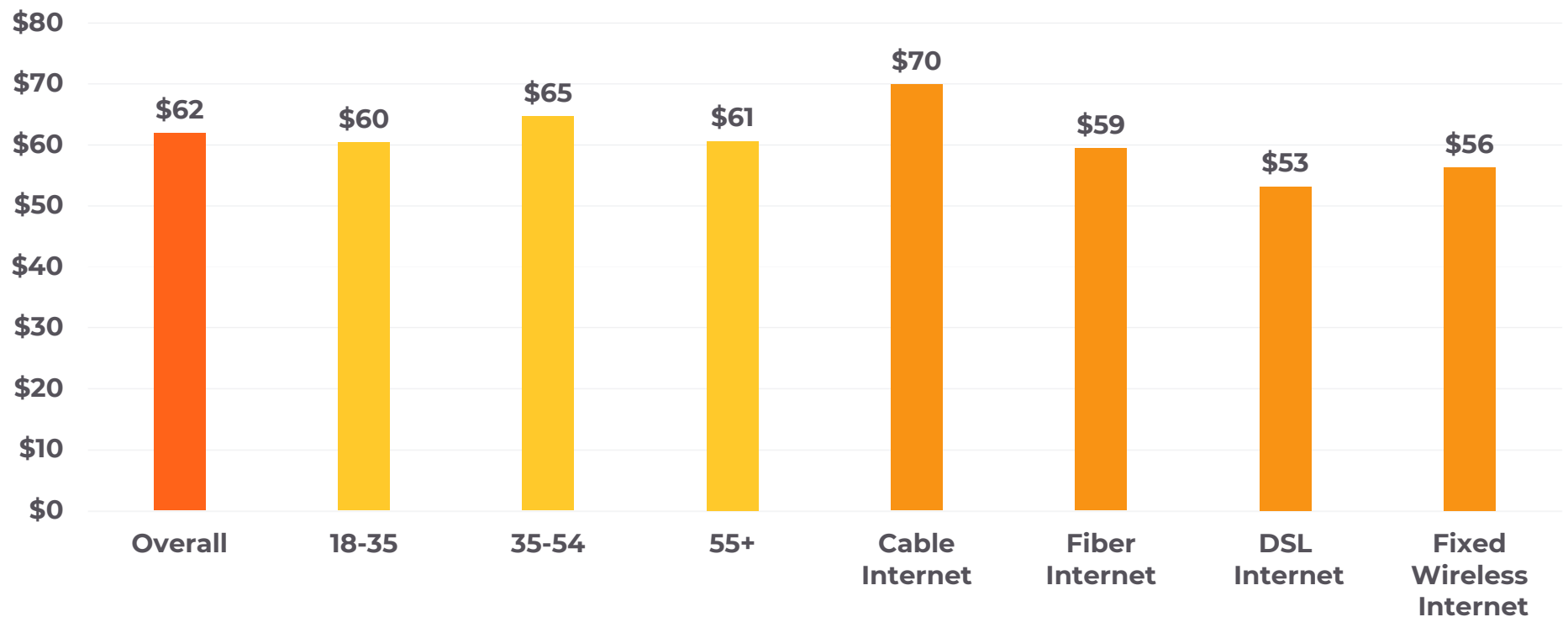
Average Spend on Internet and TV Bundle

Q33. What is the approximate amount you're paying per month for your TV and internet service bundle? (n=290)



Average Spend on Internet alone

Q34. What is the approximate amount you're paying per month for your internet service?
(n=276)



Wi-Fi



Wi-Fi in the Home

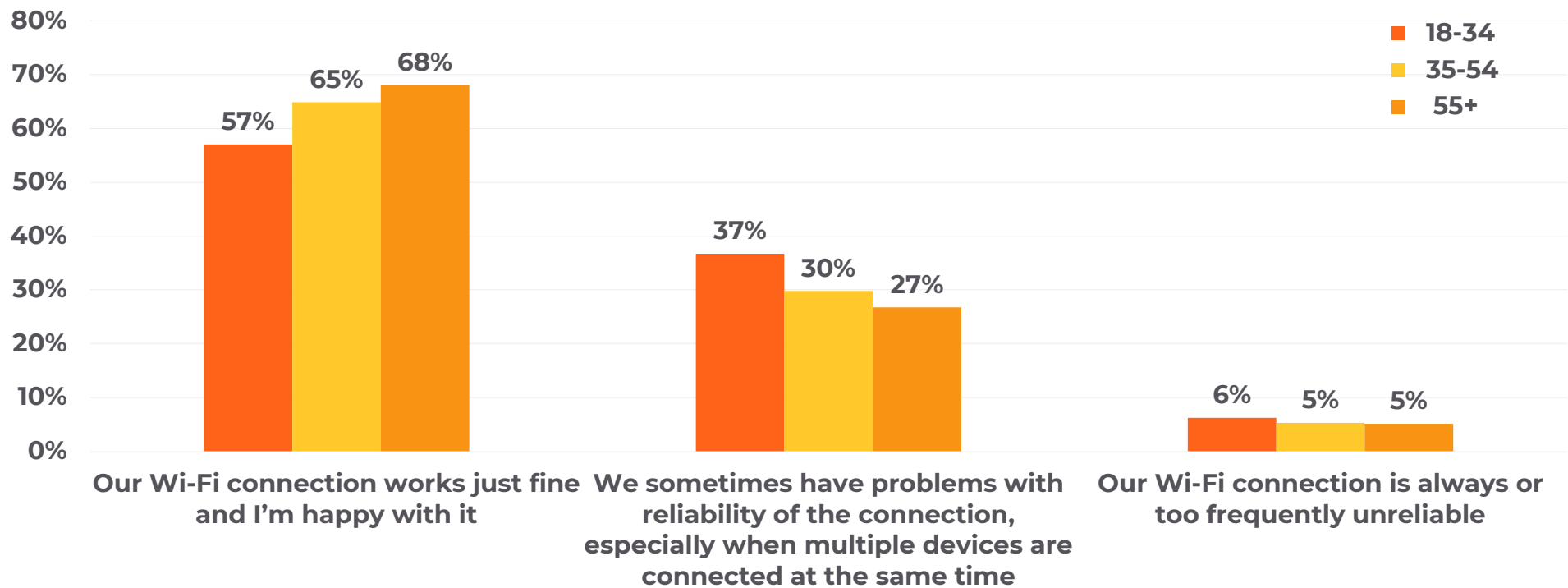
Q35. Do you have Wi-Fi in your home? (n=716)

Note: 2% said "Don't Know" (not included in total).



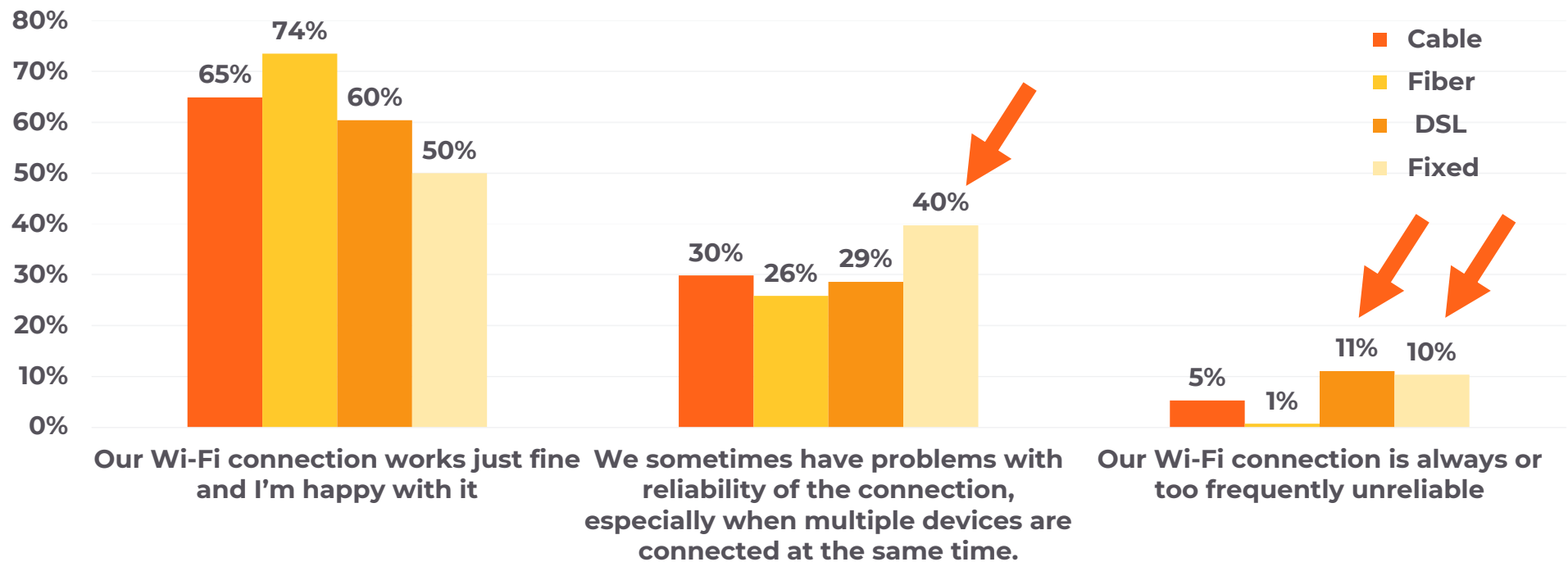
Opinions on Wi-Fi Experience

Q36. Which one of the following best describes your Wi-Fi experience at home? (n=658)



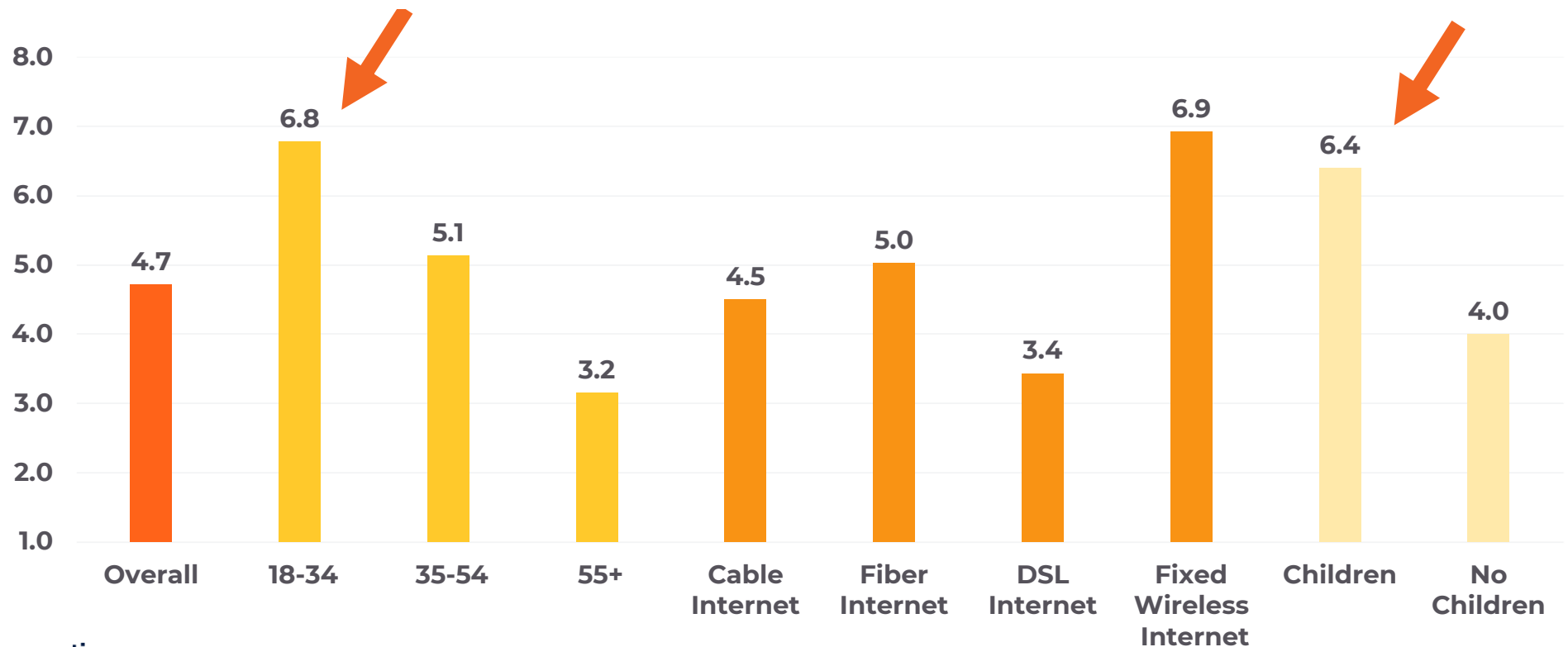
Opinions on Wi-Fi Experience

Q36. Which one of the following best describes your Wi-Fi experience at home? (n=658)



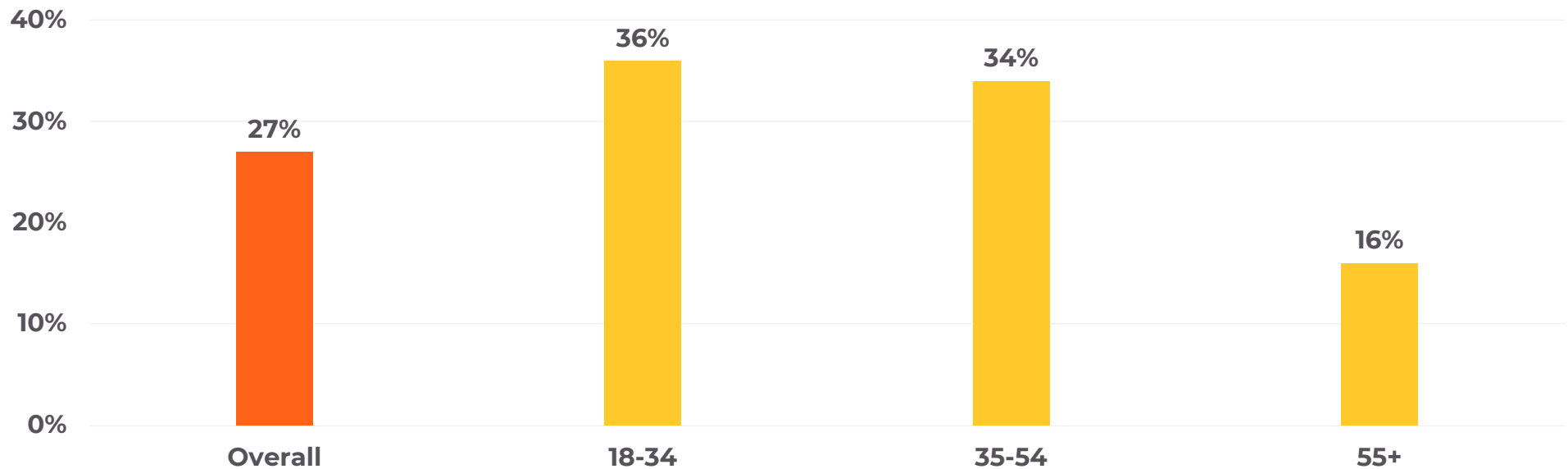
Many Devices Connected at the Same Time

Q37. On a typical day, up to how many devices might be using your home internet at the same time? (n=647)



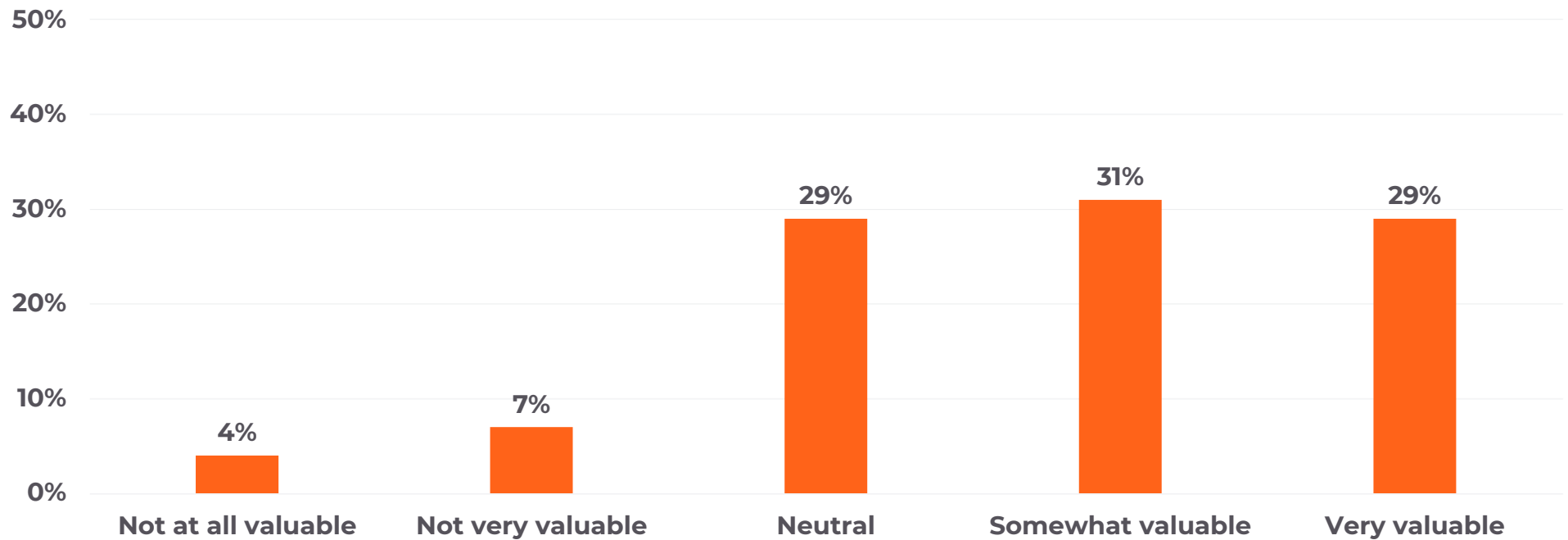
Managed Wi-Fi Penetration

Q38. Do you currently subscribe to a managed home Wi-Fi service? This allows your service provider to remotely troubleshoot and, if necessary, adjust your Wi-Fi router settings for optimal internet reliability and speed in your home. **(n=667)** *Percentage represents those answering yes.*



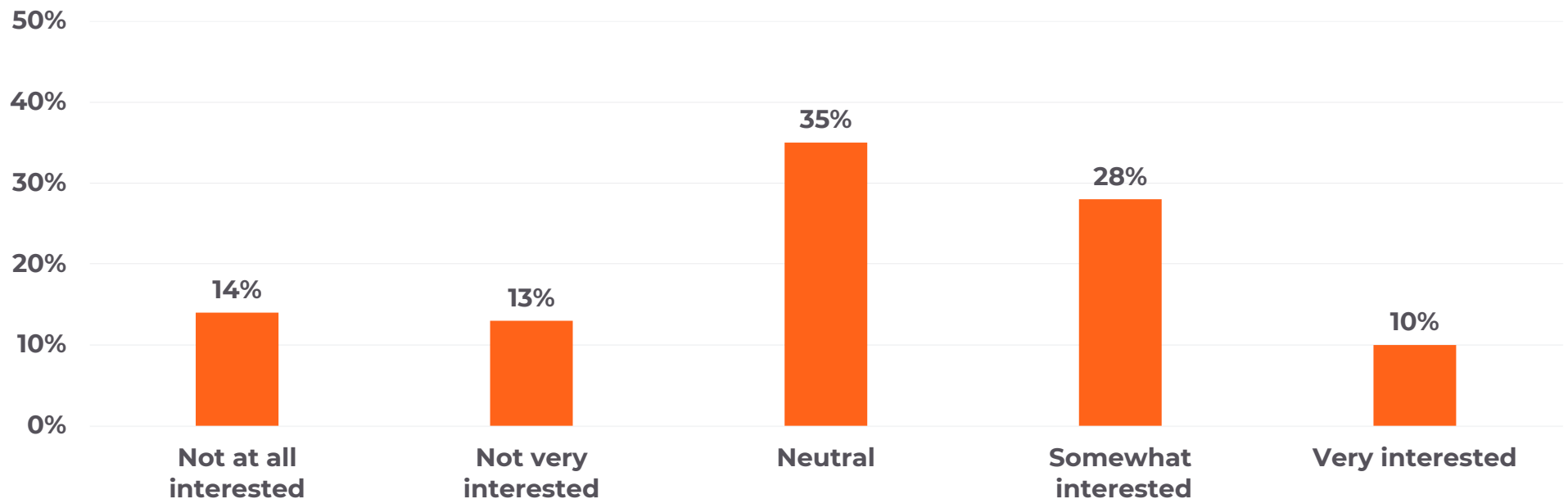
Value of Managed Wi-Fi

Q40. How would you describe the value of this service in improving the quality of your Internet? (n=181)

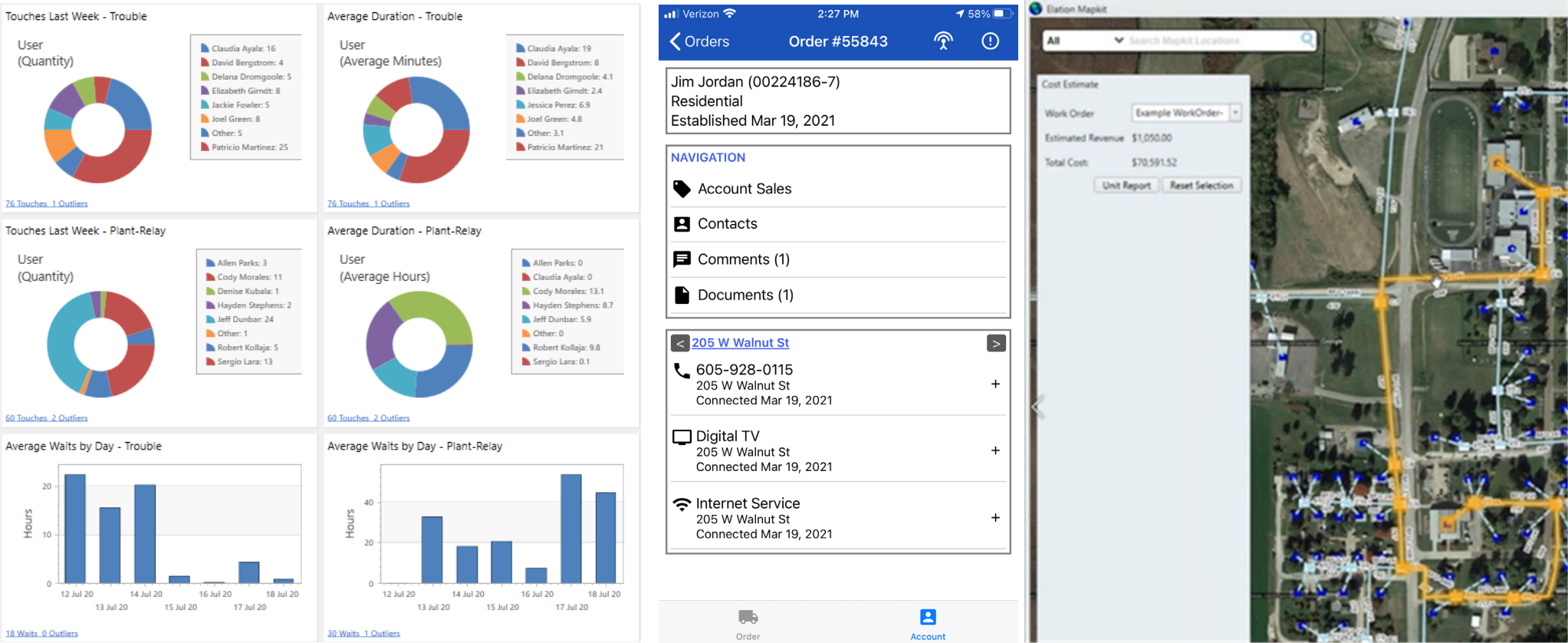


Interest in Managed Wi-Fi

Q41. Whether or not you have managed Wi-Fi service today, how interested would you be in a managed Wi-Fi service that provides unlimited tech support whenever you need to troubleshoot or set up new devices, or manage your Wi-Fi router? **(n=735)**



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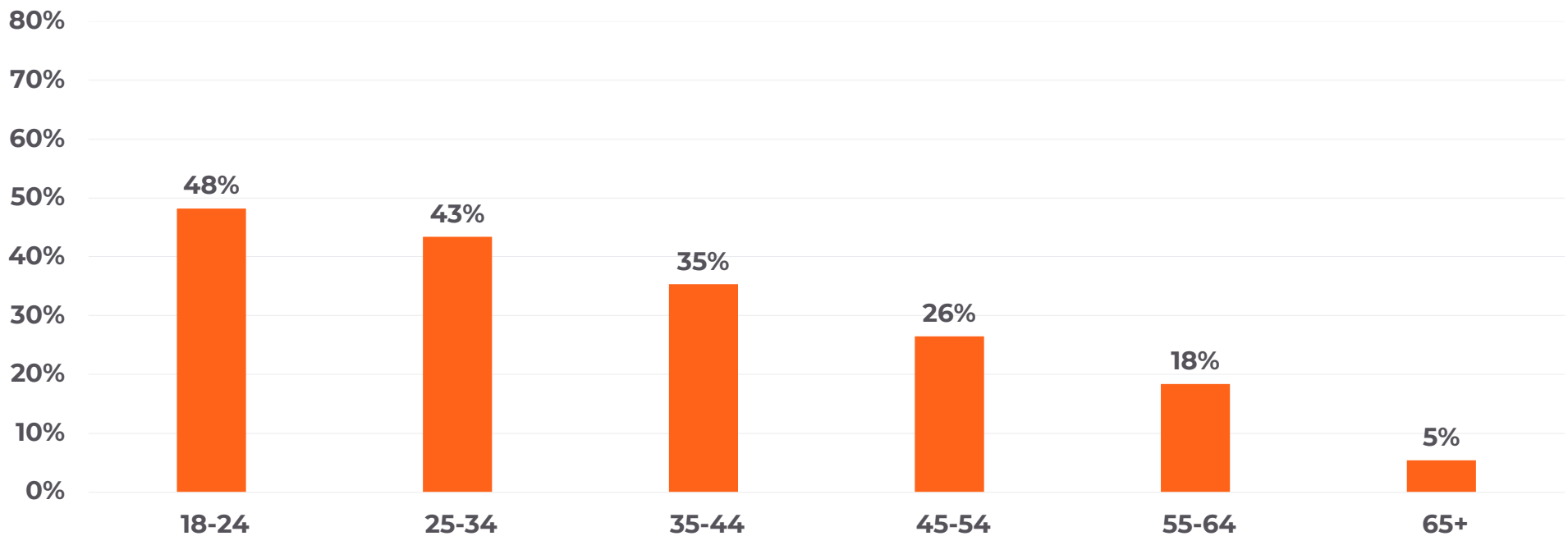
Integrated Billing-Financials-Mapping Solutions

Pandemic Response



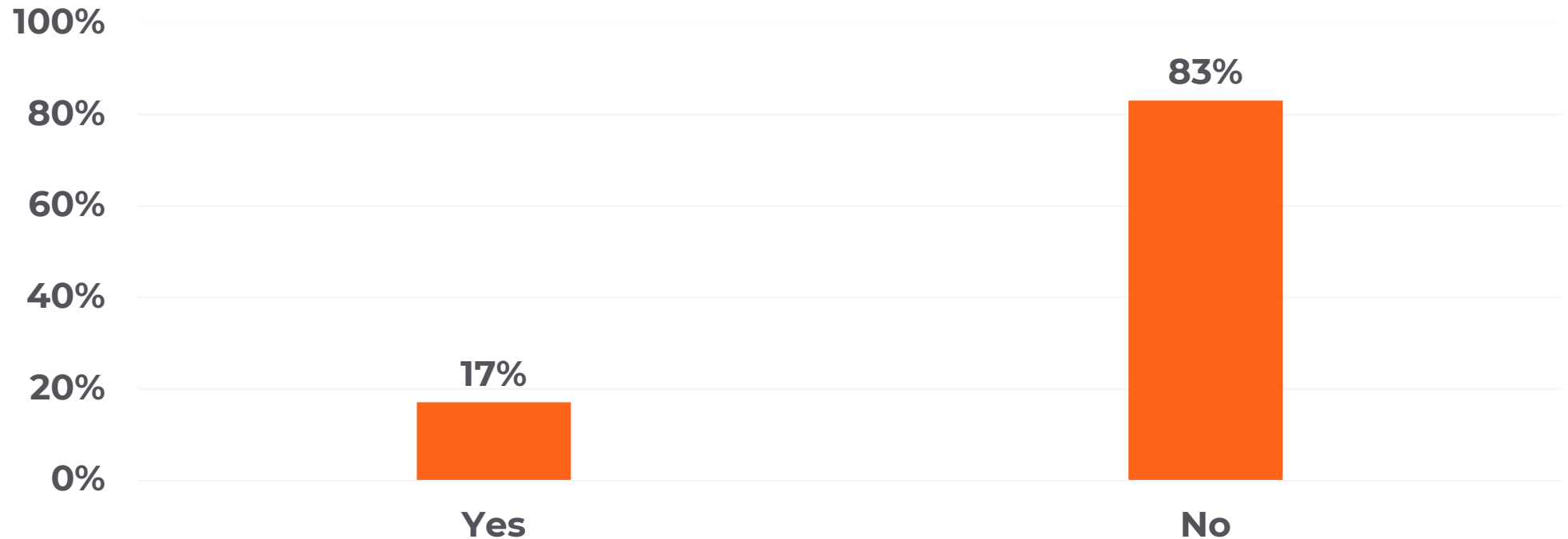
Who is Working From Home Now? (By Age)

Q42. Does someone in your household work from home who did not prior to the pandemic? **(n=726)** *Represents those answering yes.*



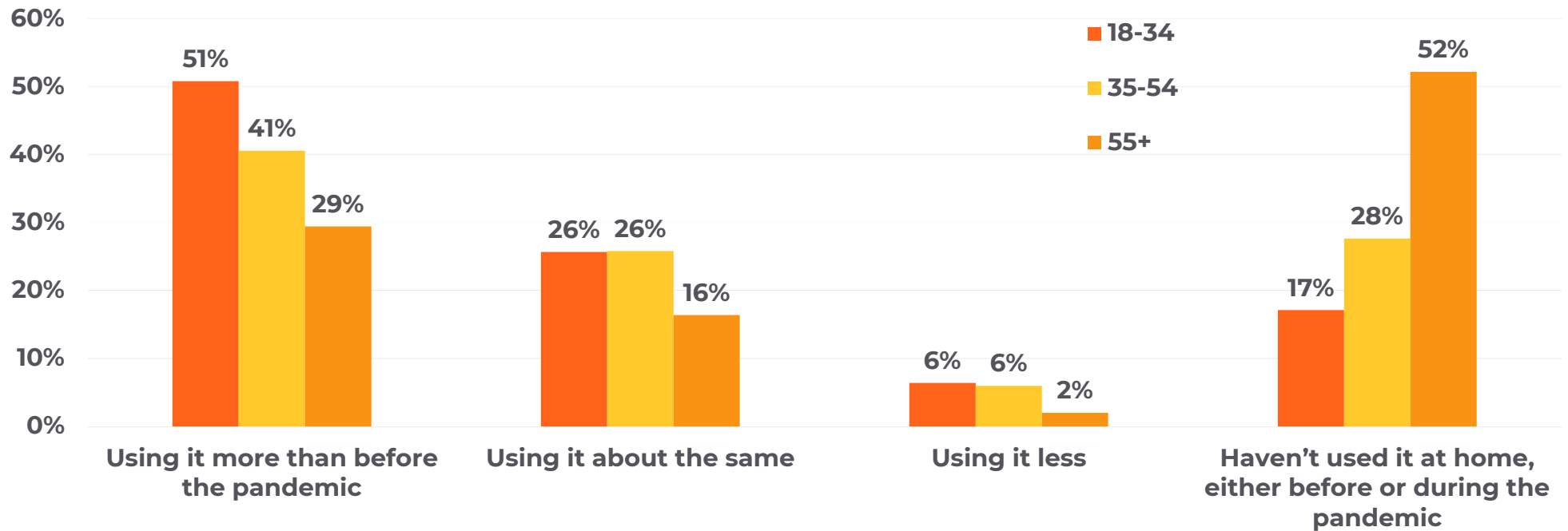
Did Rural Customers Increase Their Internet Speed?

Q43. Has your household paid extra to increase your internet speed since the pandemic began? (n=715)



Use of Video Conferencing

Q44. Which of the following describes your household's use of Zoom or other video conferencing? (n=703)



Key Findings





Key Findings

- Forty-nine percent of rural households are now streaming including 68% of 18–34-year-olds.
- Forty-three percent of rural TV subscribers do not stream at all.
- Adding streaming to a TV package increases customer satisfaction.
- Access to local channels and bundling Internet are top two reasons for staying with current TV provider.



Key Findings

- Four of the top 5 changes to TV service in the past year have involved either adding or reducing channels, including premium channels.
- Roughly 35% to 45% of rural TV customers are considering dropping pay TV for streaming only.



Key Findings

- Roughly 23% of rural Internet customers subscribe to fiber, 39% to cable broadband, 14% to DSL, 10% use fixed wireless, and 6% use satellite broadband.
- Satisfaction with fiber internet (8.1 on a 1 to 10 scale) and fixed wireless internet (7.9) is notably higher than cable internet (7.4) and DSL internet (7.1).
- Close to 1/2 of rural customers bundle Internet and TV.



Key Findings

- Sixty percent of respondents with managed Wi-Fi believe the service is Somewhat Valuable (31%) or Very Valuable (29%).
- Just over 1/4 of rural customers have managed Wi-Fi, and more than 1/3 are interested in it.
- Almost 1/3 of rural Internet customers are seeking faster speeds.



Thank you!