

# Innovative Systems 2023 Rural Broadband & Video Study"

Report of Findings





## Methodology

1. These findings are based on online surveys administered in January 2023.
2. Primary objectives are to understand satisfaction and usage trends of rural broadband and video consumers.
3. In total, 841 rural US residents participated (MoE +/- 3.4%). A leading research panel company provided the sample.
4. The survey instruments were written by Pivot with input, collaboration, and additional questions provided by Innovative Systems.

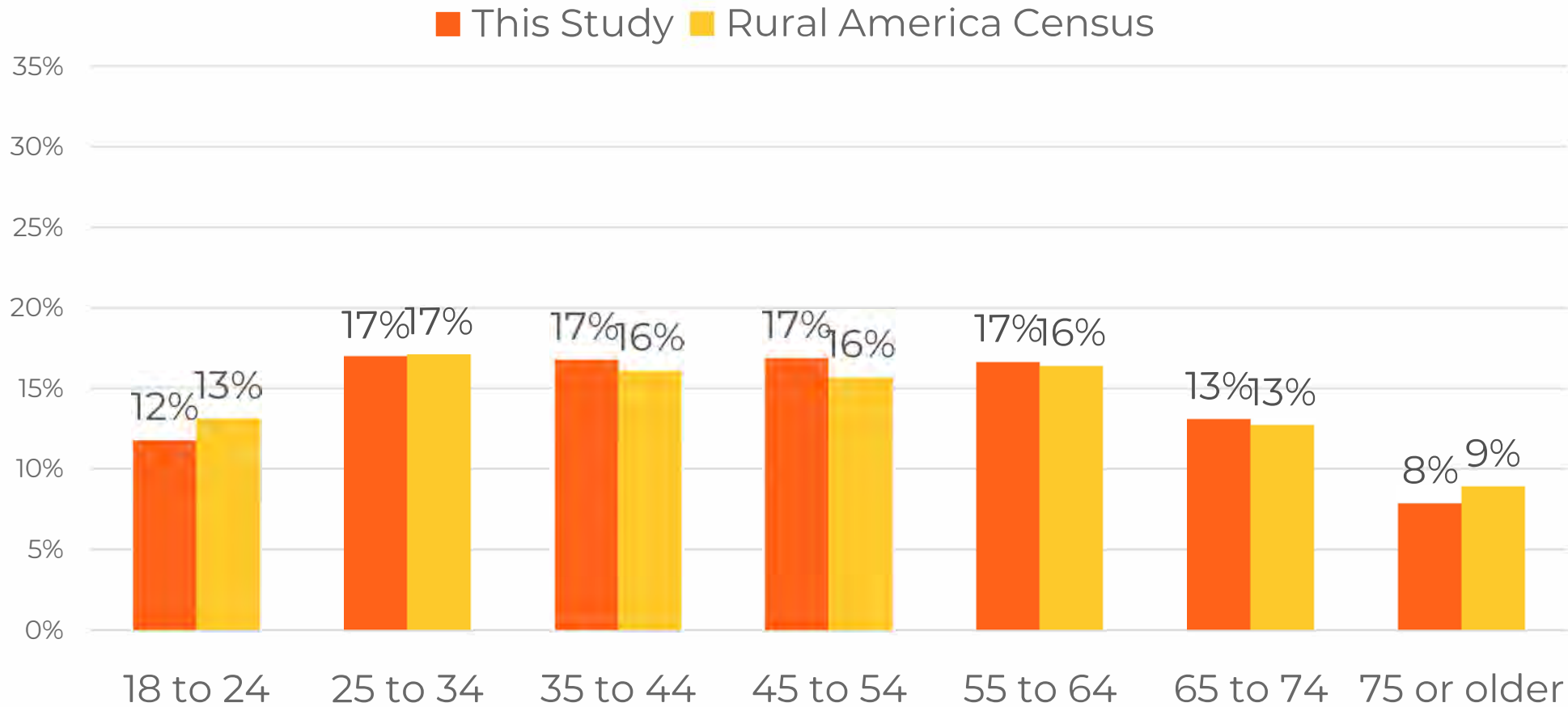
## Statistically Significant Differences



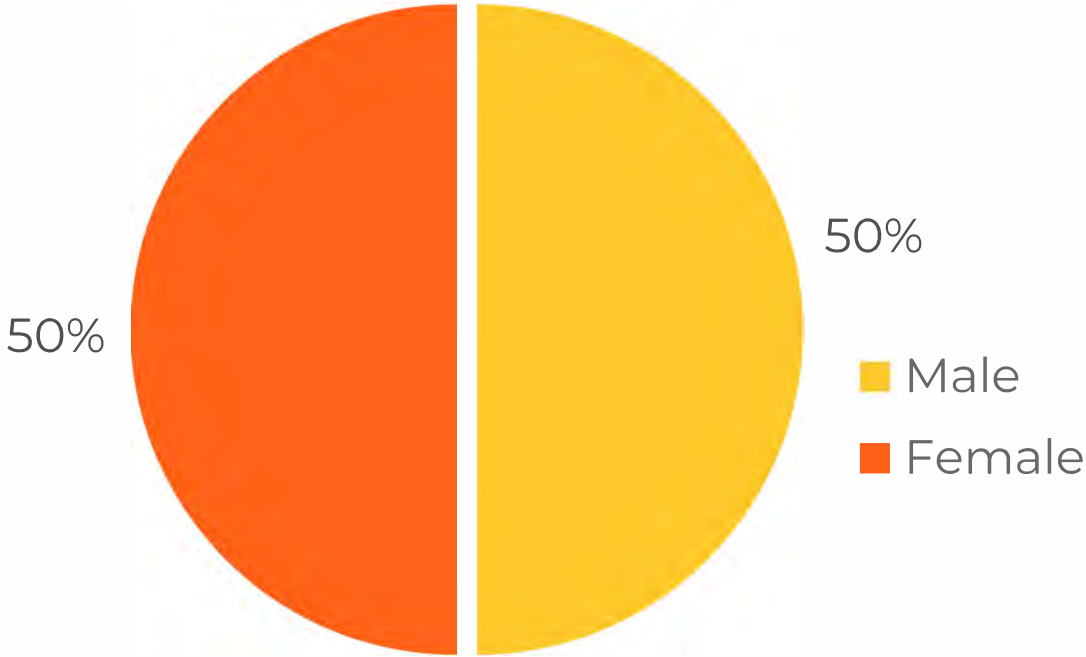
When you see an orange or grey arrow in a chart next to a number, it means the number is, statistically speaking, significantly higher or lower than one or more corresponding numbers in the same chart.

It passes the industry standard statistical difference test at the 95% confidence level. Meaning, if this study were repeated with separate but similar groups of respondents, we would expect that number to be higher, 95 times out of 100.

# Age Group – Compared to Rural America



# Gender



**2022 male / female:  
48% / 52%**

# Video

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InnoStream™

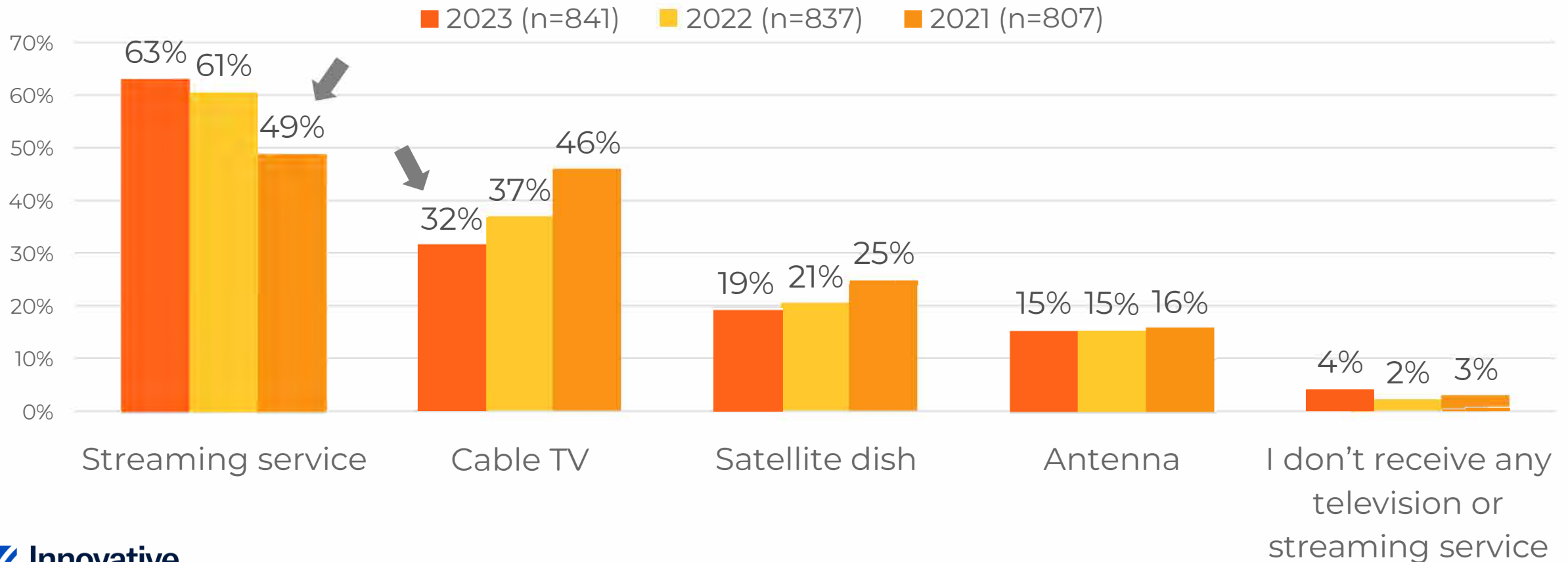
**Video Solutions**

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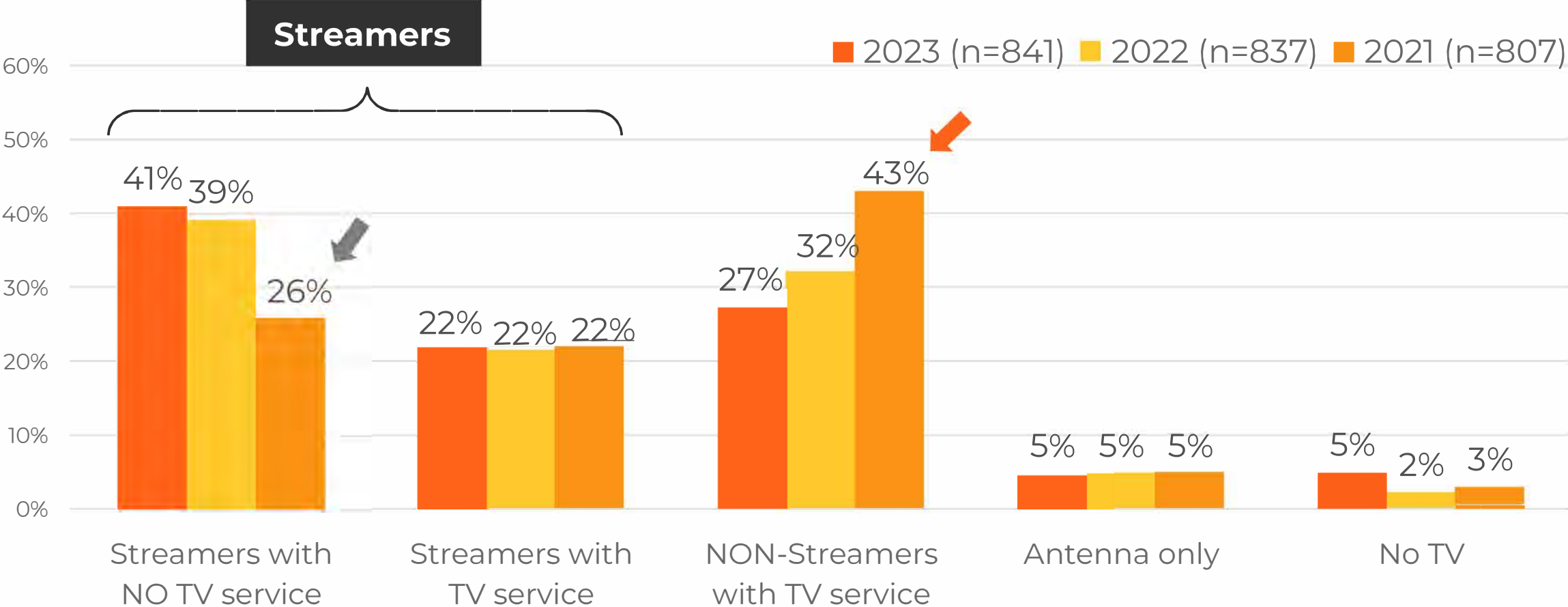
# How Are You Receiving TV Service?

Q4. Which of the following describes how you receive television service in your home? (n=841)  
*Check all that apply.*



# How Are You Receiving TV Service?

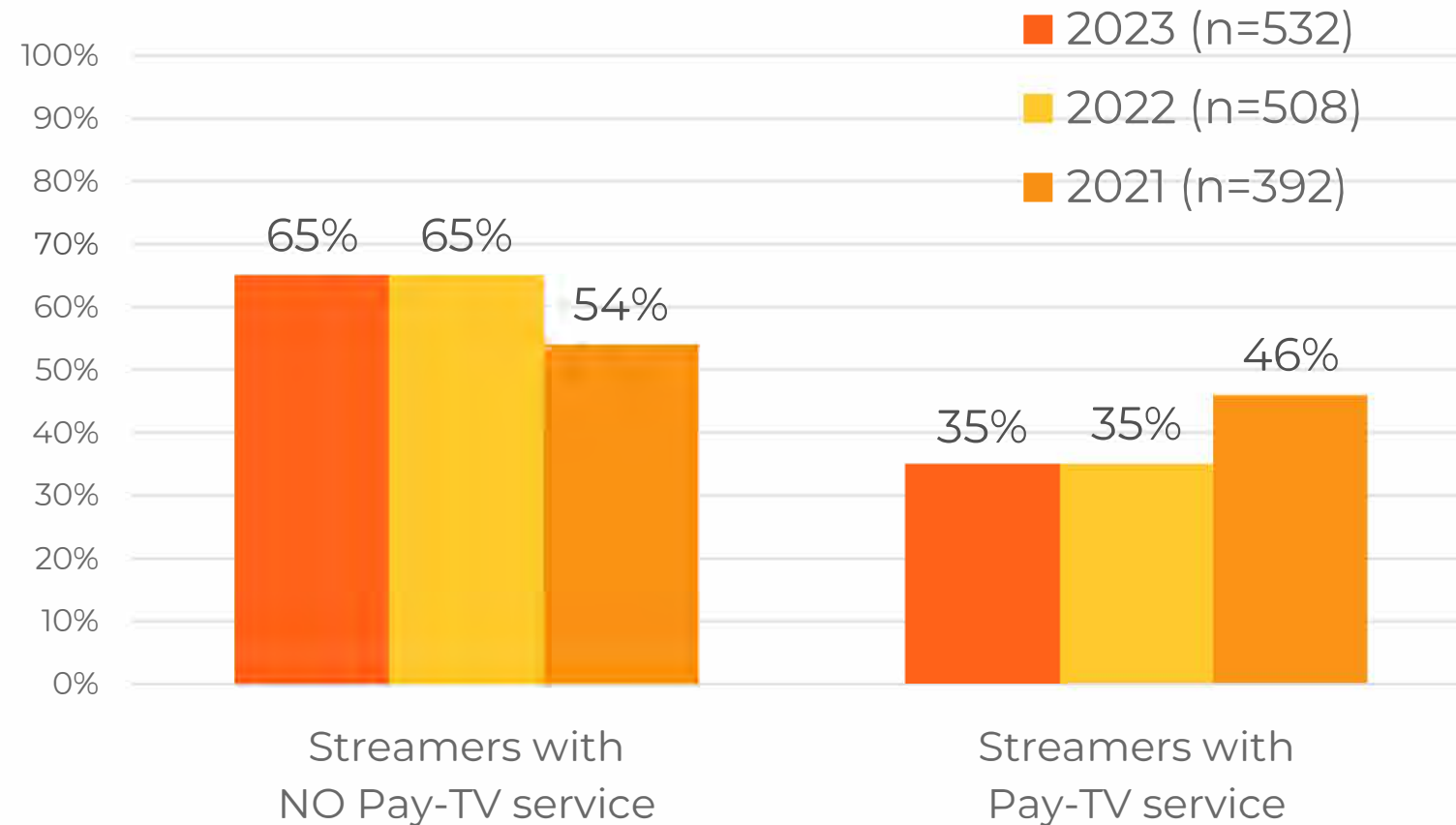
Q4. Which of the following describes how you receive television service in your home?





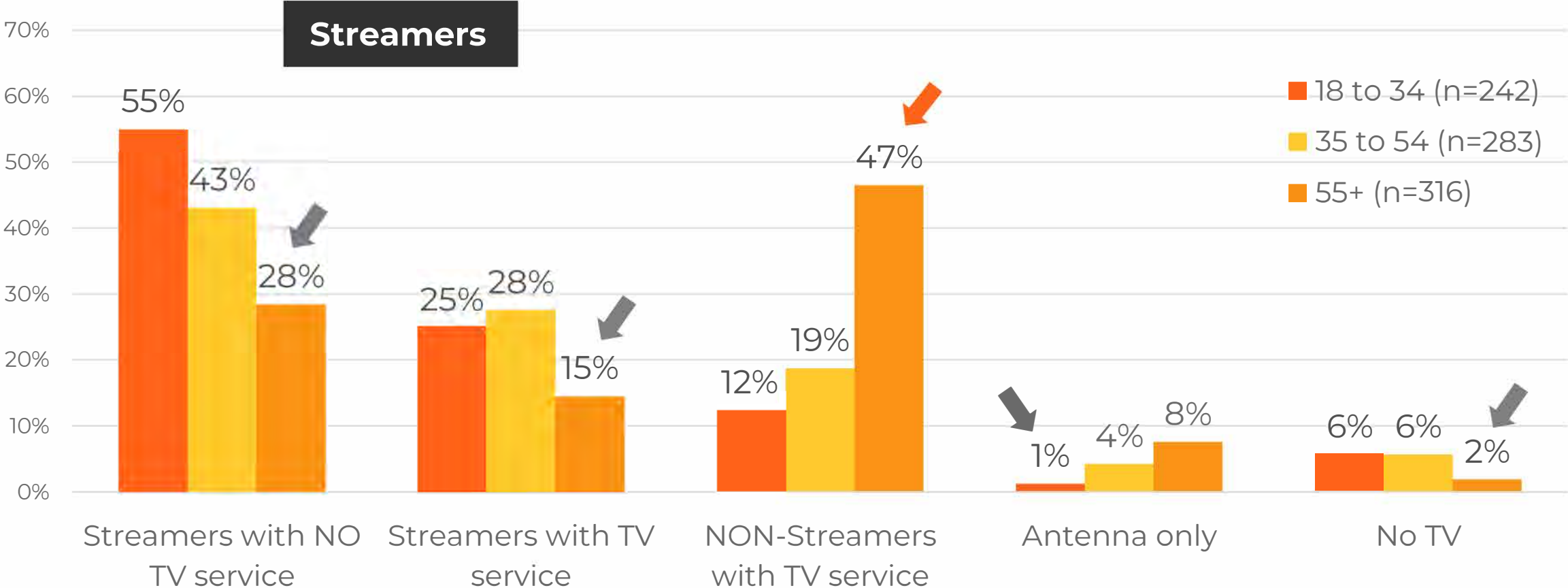
# Streamers with/without Pay-TV

Q4. Which of the following describes how you receive television service in your home? (shown are video consumption behaviors by streamers only)



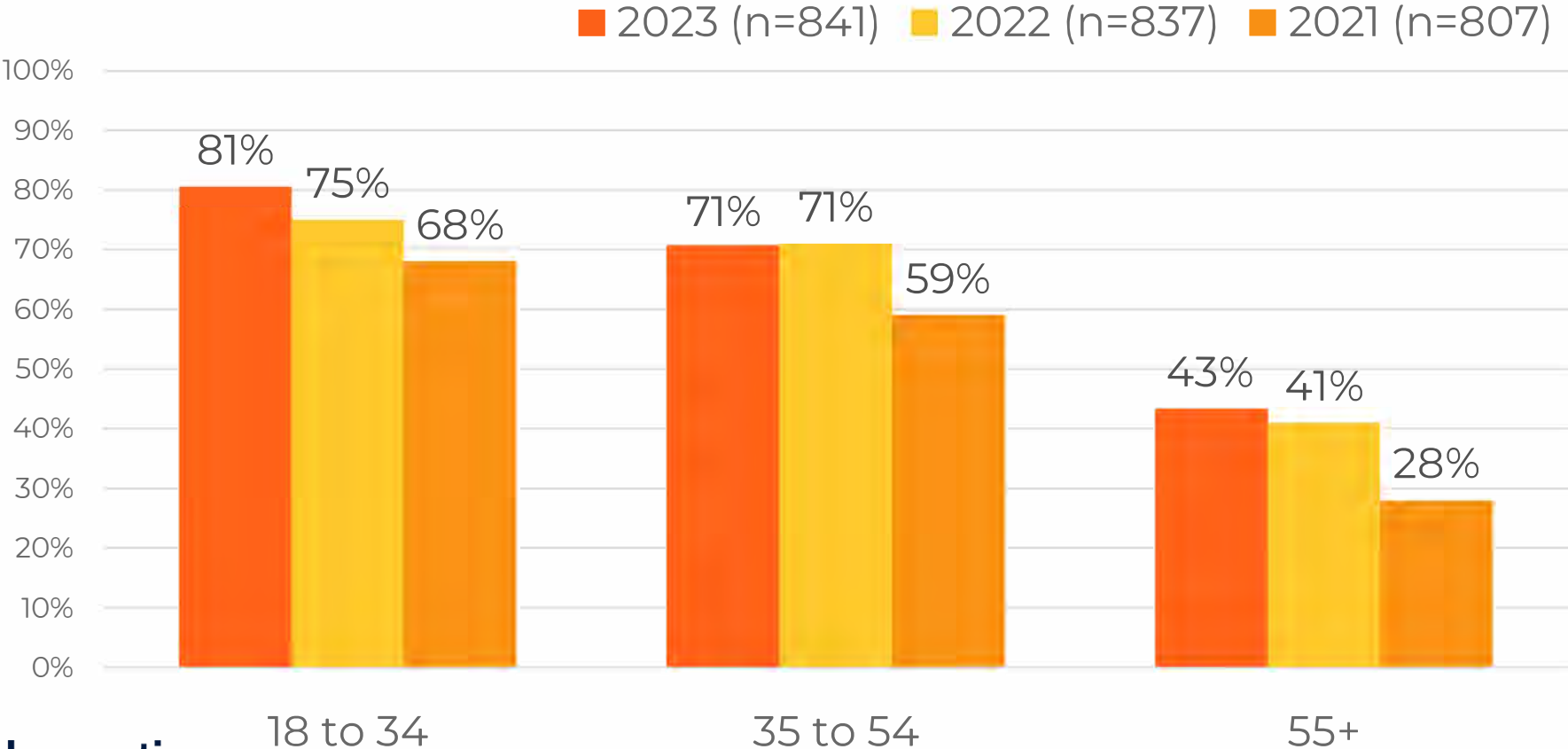
# Streamers by Age Group

Q4. Which of the following describes how you receive television service in your home?



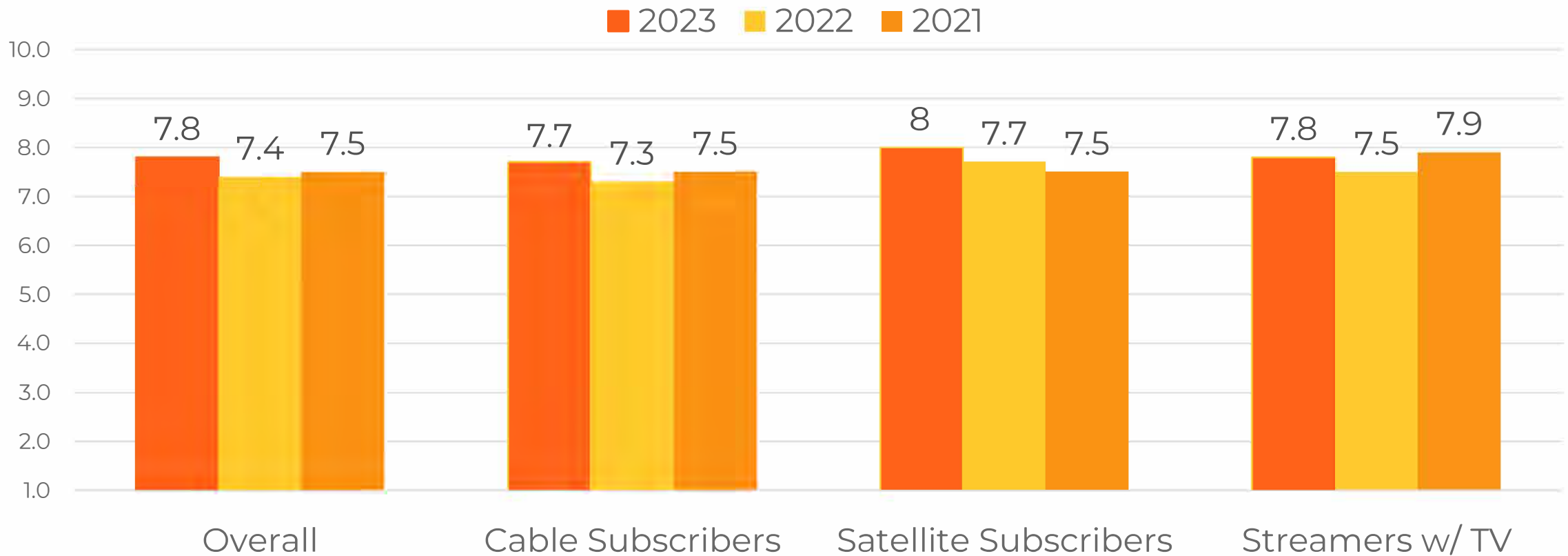
# Popularity of Streaming by Age Group

**Percentage receiving TV via streaming** (from Q4. Which of the following describes how you receive television service in your home?)



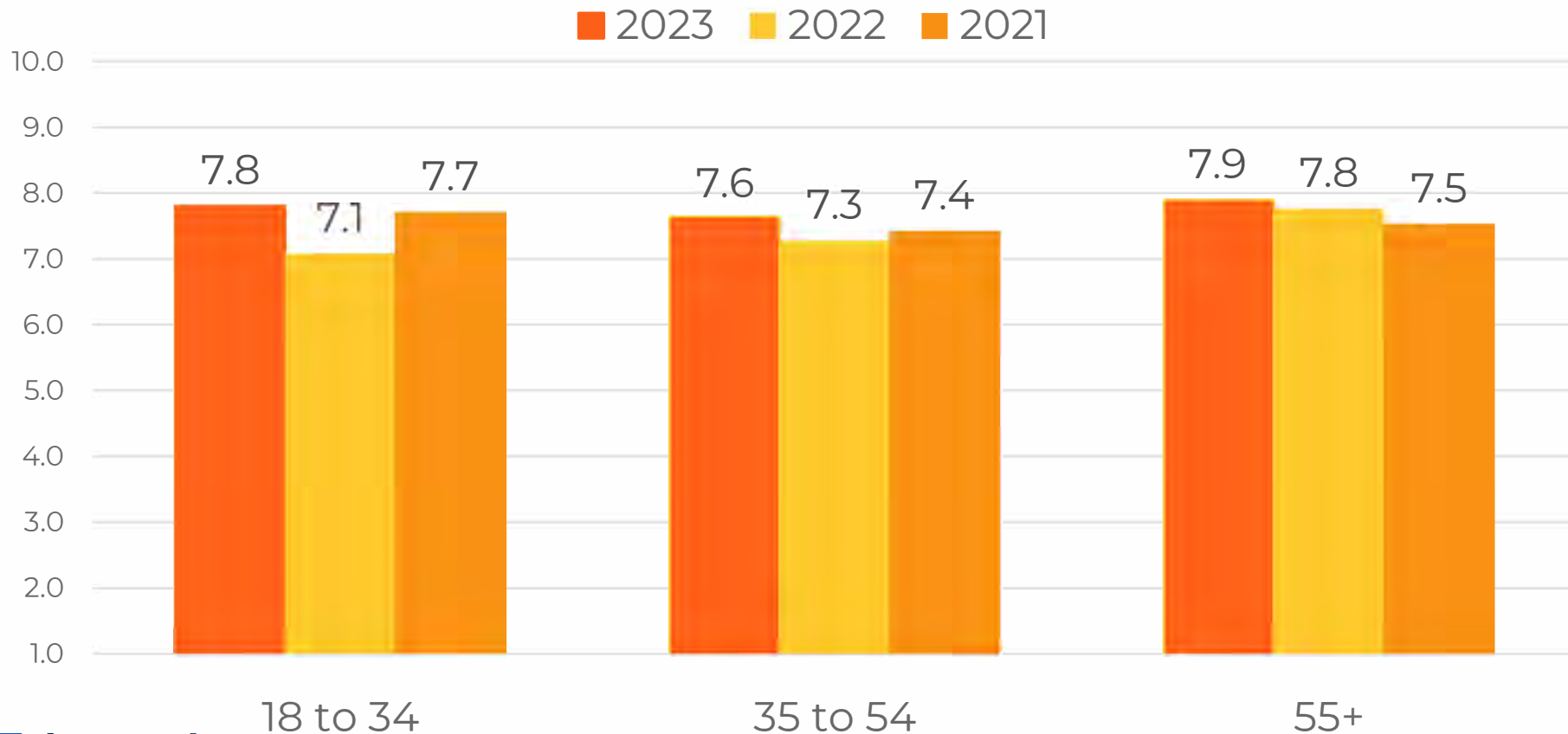
# Satisfaction with TV Provider

Q5A. Please rate your overall satisfaction with your television provider. (n=415) Shown are mean ratings based on a 1 to 10 scale where 1 equals Completely dissatisfied, and 10 equals Completely satisfied.



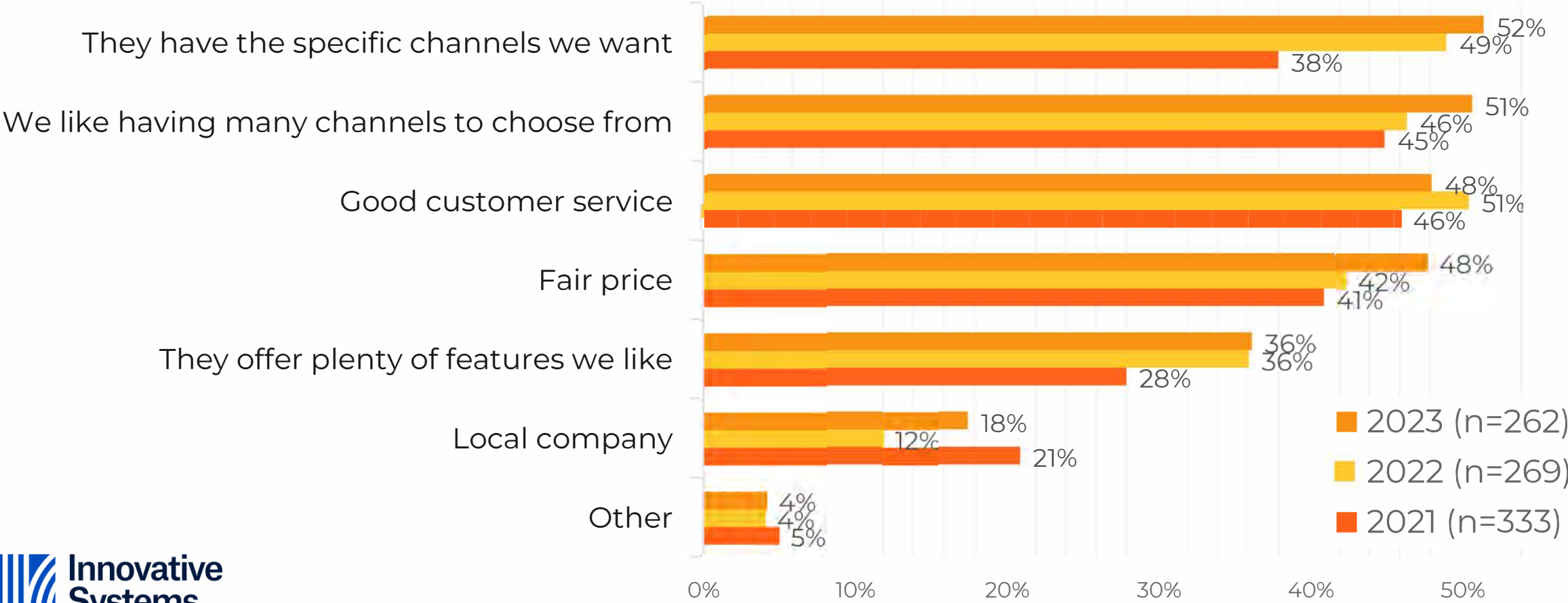
# Satisfaction with TV Provider by Age Group

Q5A. Please rate your overall satisfaction with your television provider. (n=415) *Shown are mean scores based on a 1 to 10 scale where 1 equals Completely dissatisfied, and 10 equals Completely satisfied.*



# Drivers of High TV Satisfaction

Q5B. 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 TV Satisfaction.)*



# Drivers of High TV Satisfaction — by Age Group

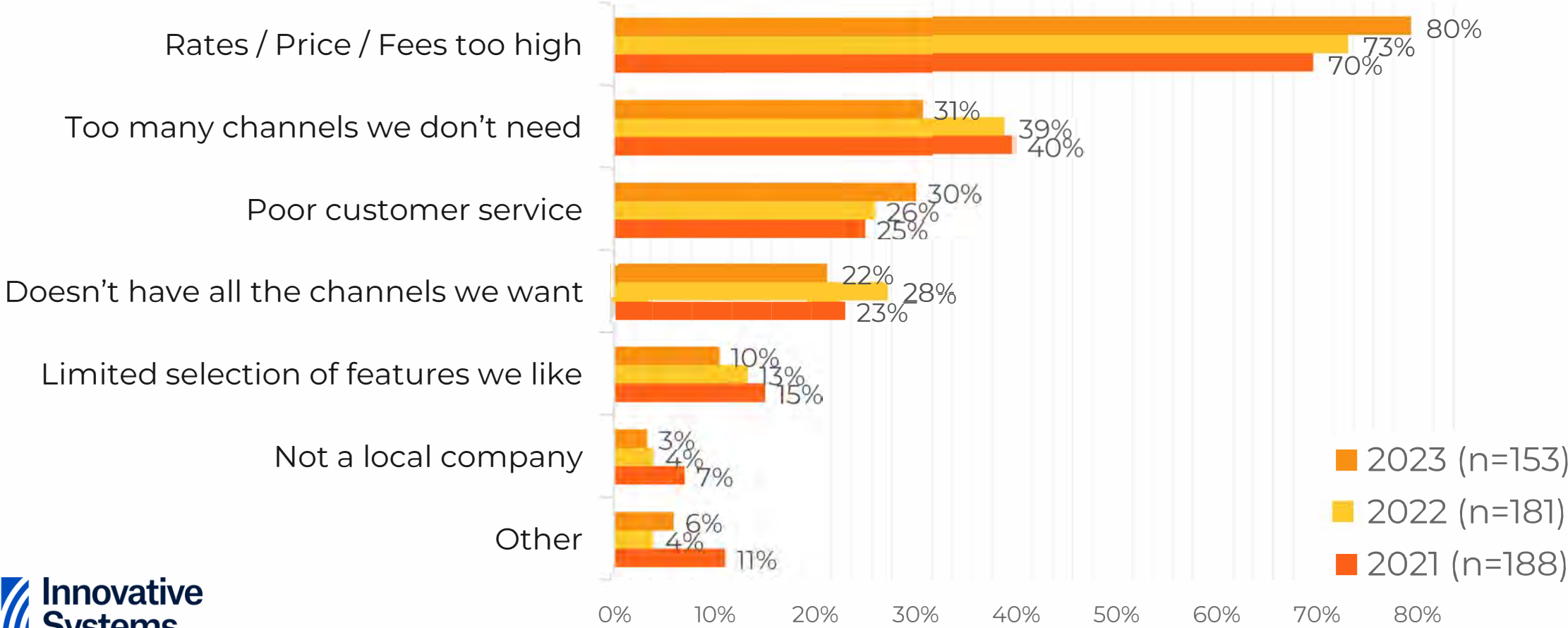
Q5B. What has the greatest influence on your satisfaction? *Check all that apply (Asked of those who gave a rating of 8, 9, or 10 on TV Satisfaction.)*

	Total	18 to 34	35 to 54	55+
Total Answering:	262	53	75	134
They have the specific channels we want	52%	53%	40%	57%
We like having many channels to choose from	51%	57%	59%	44%
Good customer service	48%	57%	45%	46%
Fair price	48%	68%	59%	34%
They offer plenty of features we like	36%	51%	40%	28%
Local company	18%	17%	15%	19%
Other	4%	4%	4%	4%

\*Cells shaded *yellow* are significantly higher; cells shaded *orange* are significantly lower.

# Drivers of Low TV Satisfaction

Q5C. What keeps you from giving a higher rating? *Check all that apply (Asked of those who gave a rating of 7 or lower on TV Satisfaction.)*





# Drivers of Low TV Satisfaction — by Age Group

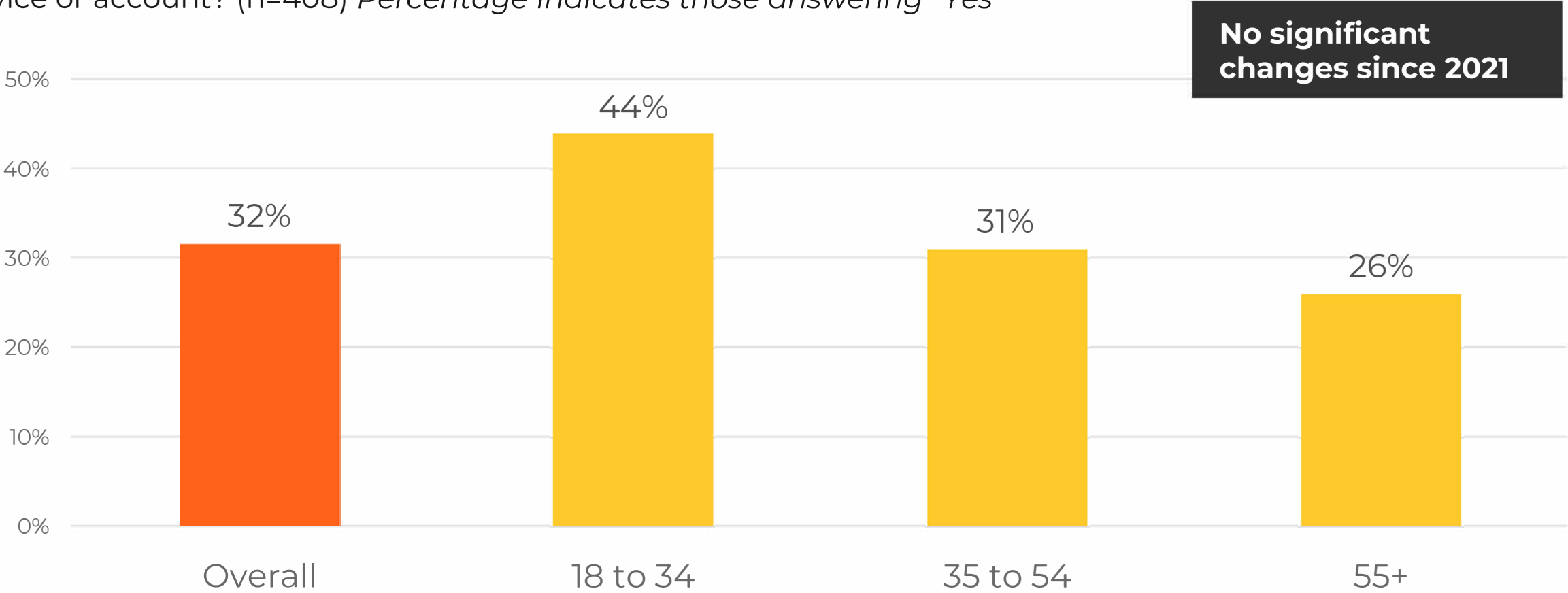
Q5C. What keeps you from giving a higher rating? *Asked of those who gave 7 or lower on TV Satisfaction. List was provided and respondent could select as many as applied.*

	Total	18 to 34	35 to 54	55+
Total Answering:	153	38	56	59
Rates / Price / Fees too high	80%	58%	<b>82%</b>	<b>92%</b>
Too many channels we don't need	31%	32%	18%	<b>42%</b>
Poor customer service	30%	47%	27%	22%
Doesn't have all the channels we want	22%	34%	20%	15%
Limited selection of features we like	10%	13%	11%	8%
Not a local company	3%	5%	4%	2%
Other	4%	2%	5%	4%

\*Cells shaded yellow are significantly higher; cells shaded orange are significantly lower.

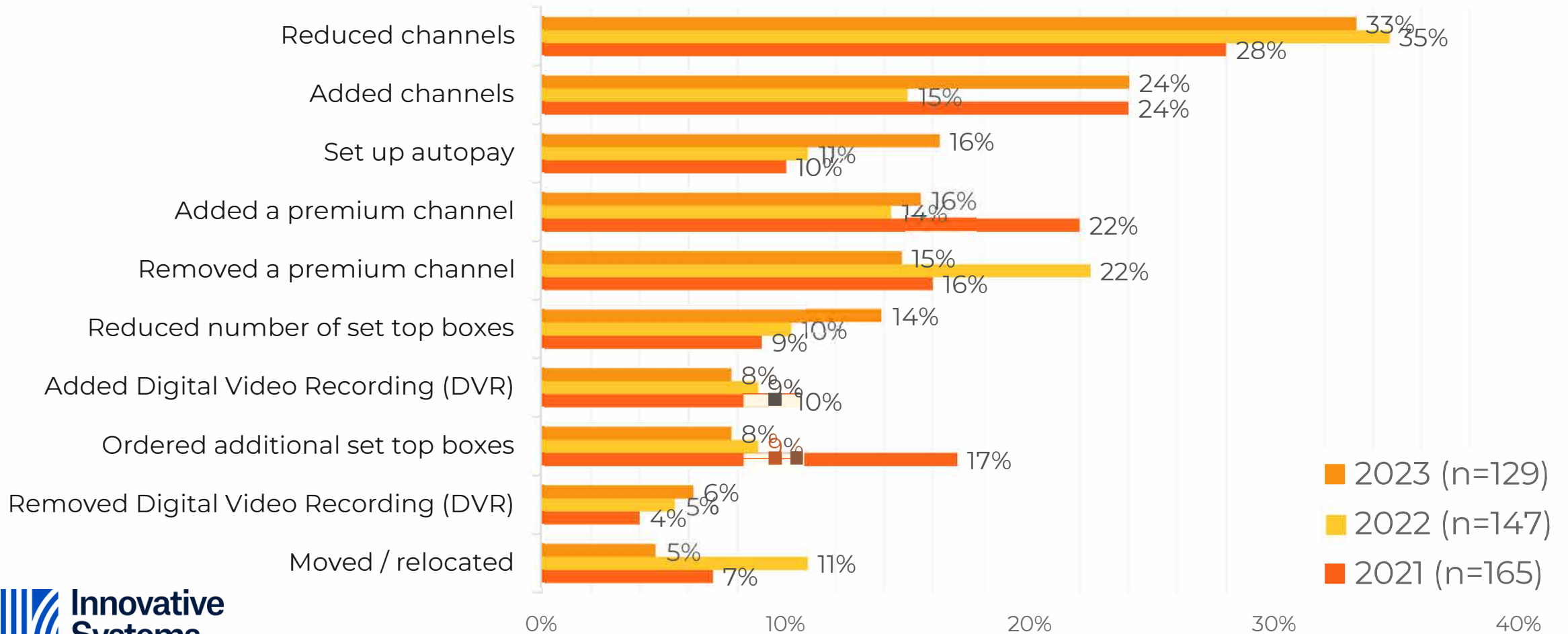
# Contact with TV Provider in the Last Year by Age Group

Q7A. In the past 12 months, have you contacted your TV provider to make any changes to your TV service or account? (n=408) *Percentage indicates those answering "Yes"*



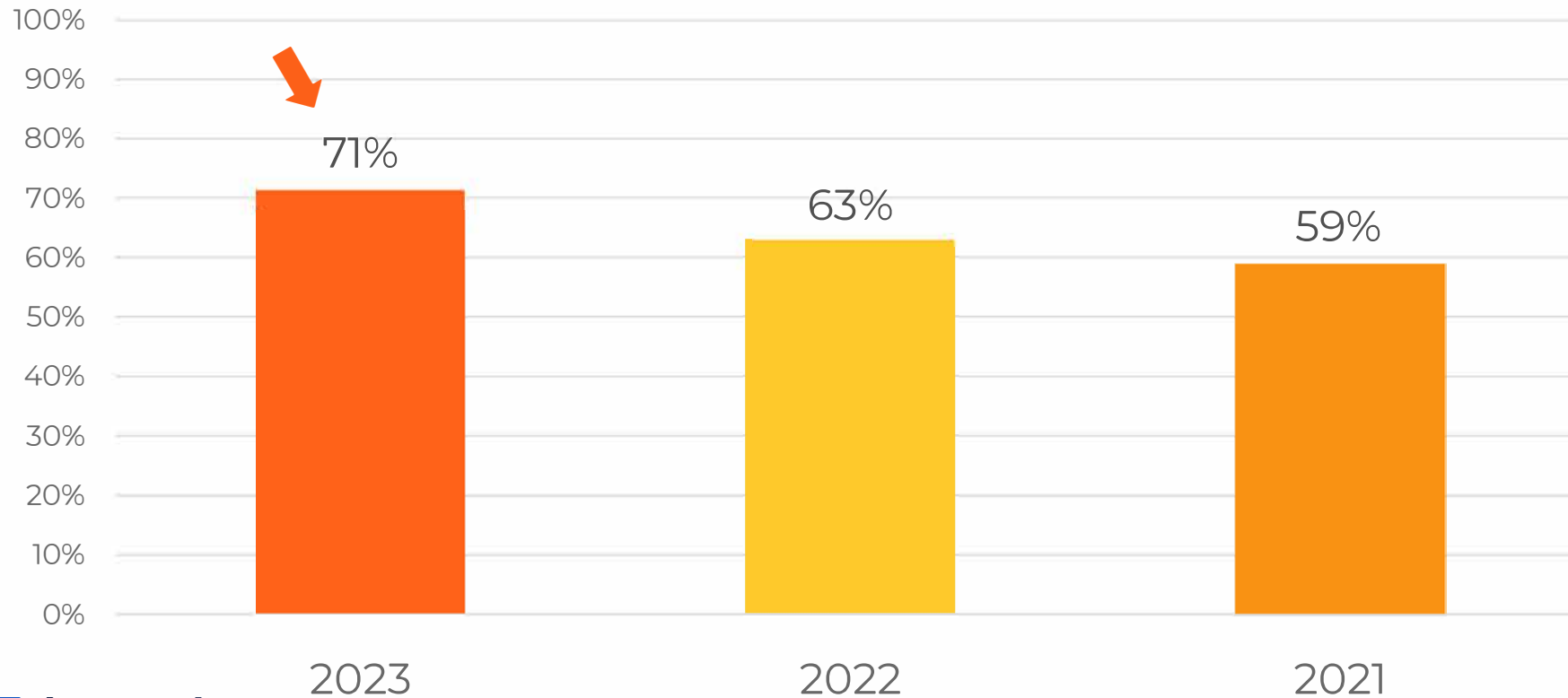
# Type of Contact with TV Provider

Q7B. What changes did you make? *Asked of those who said they made changes to their TV service or account*



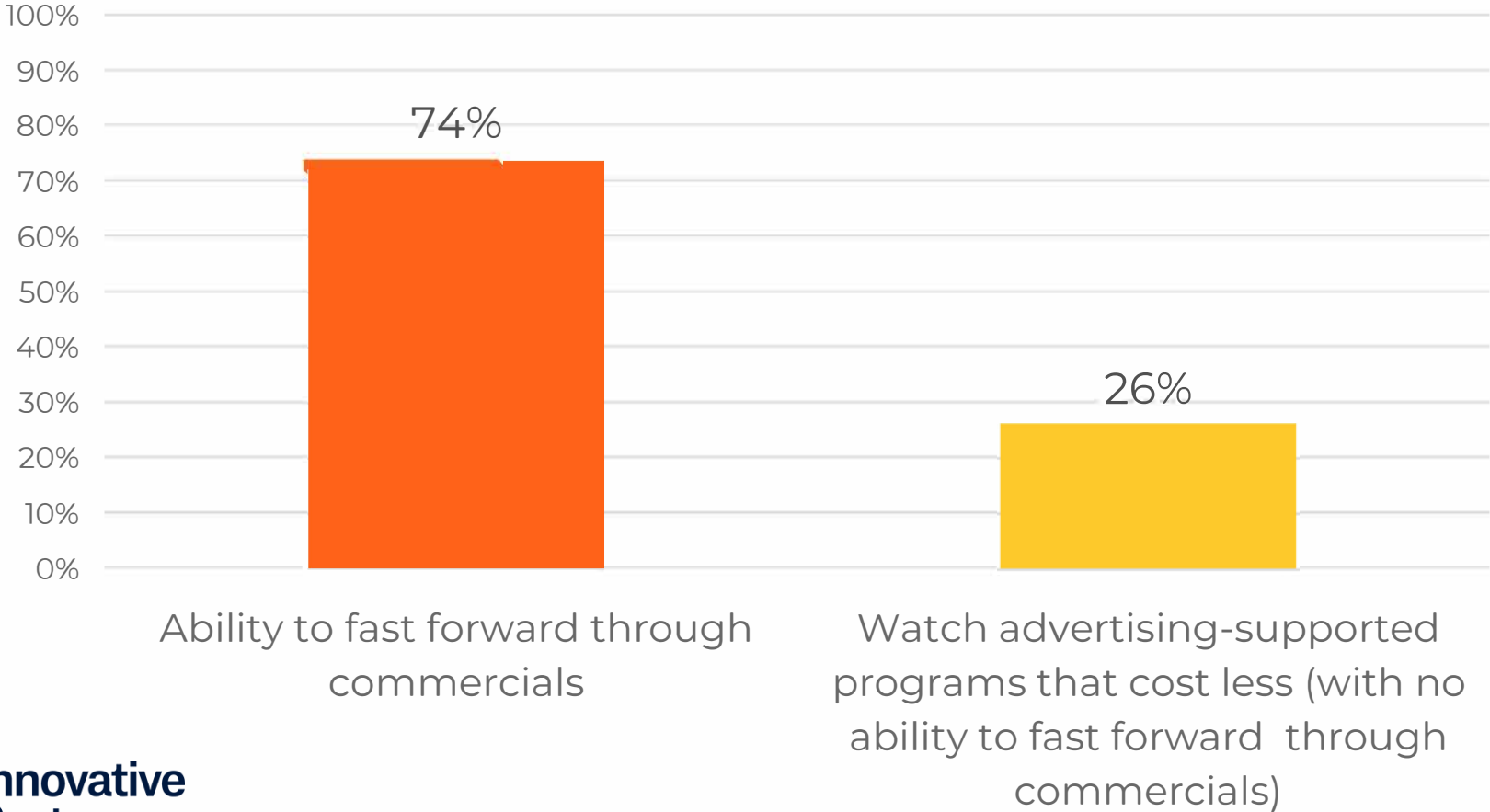
# The Ability to Record Show (DVR or other)

Q8A. Do you currently have Digital Video Recording (DVR) or the ability to record TV programs? (n=402)  
*Percentage indicates those answering "Yes"*



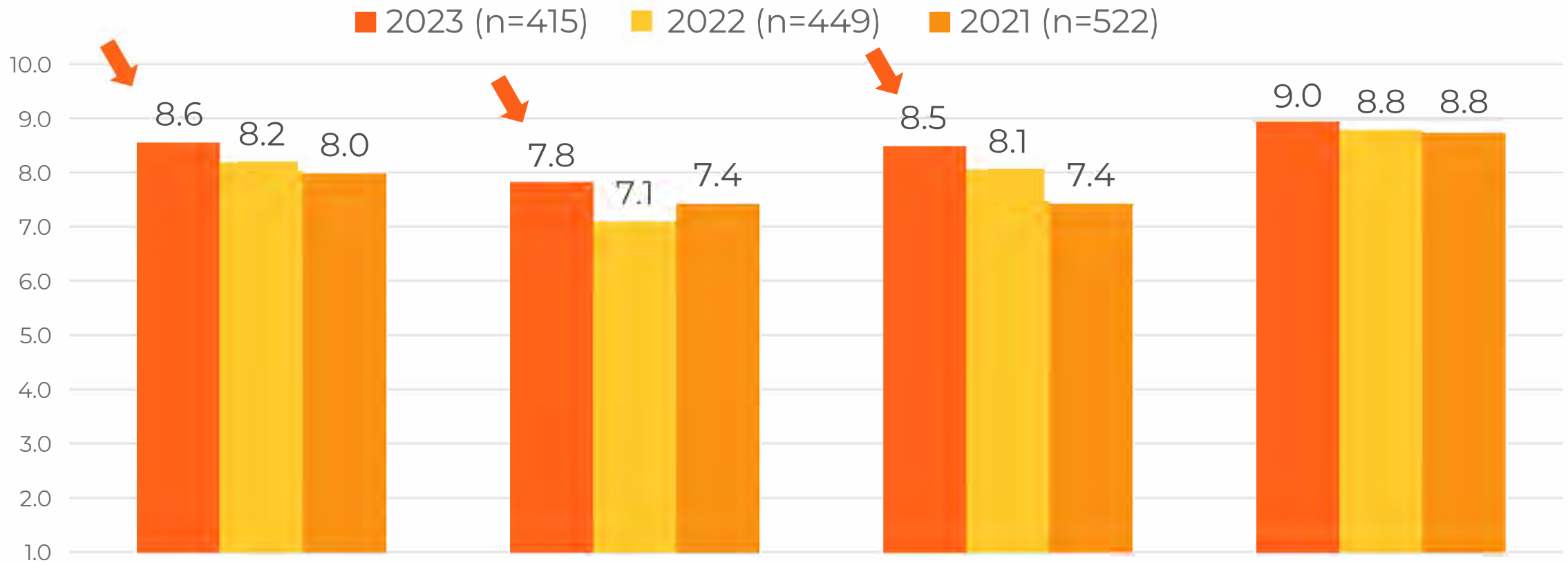
# Ability to Skip Commercials vs Lower Cost

Q8B. Which one of the following do you / would you prefer? (n=412)



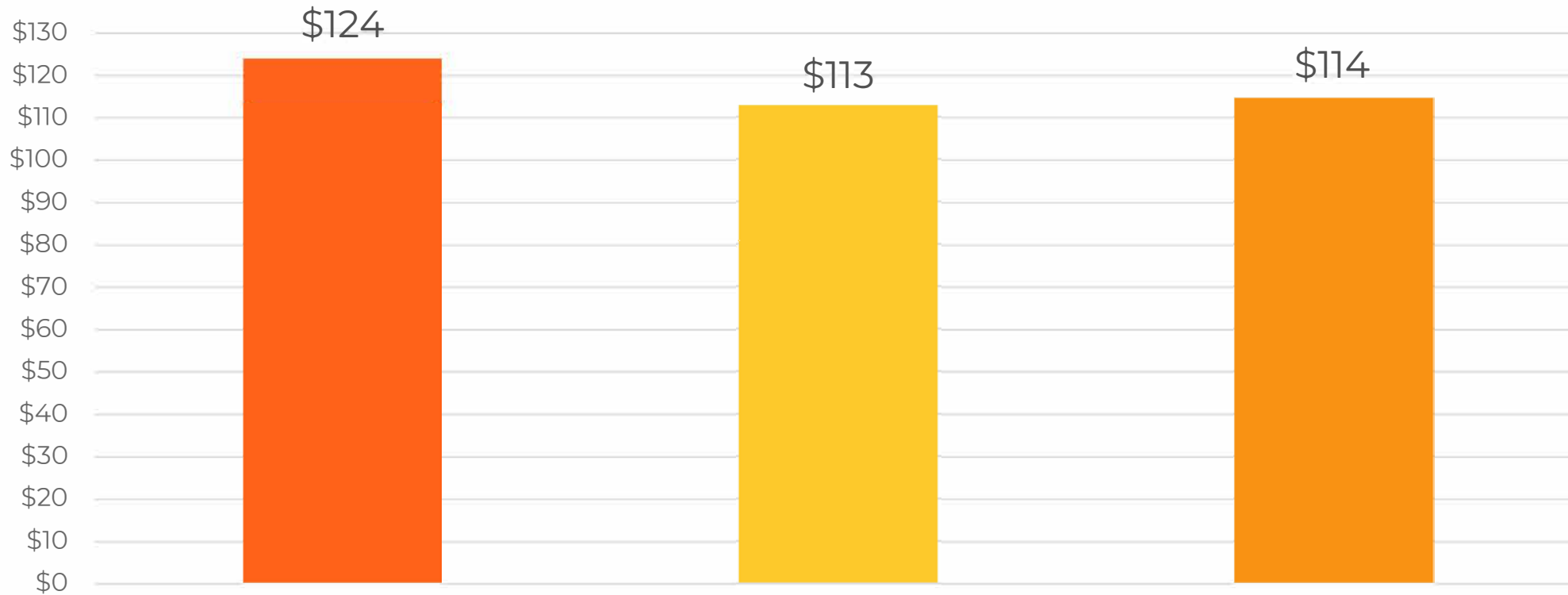
# The Importance of Local Programming

Q9. How important is it for your household to have channels with local news, weather and sports? *Shown are mean ratings based on a 1 to 10 scale where 1 equals Not at all important, and 10 equals Very important.*



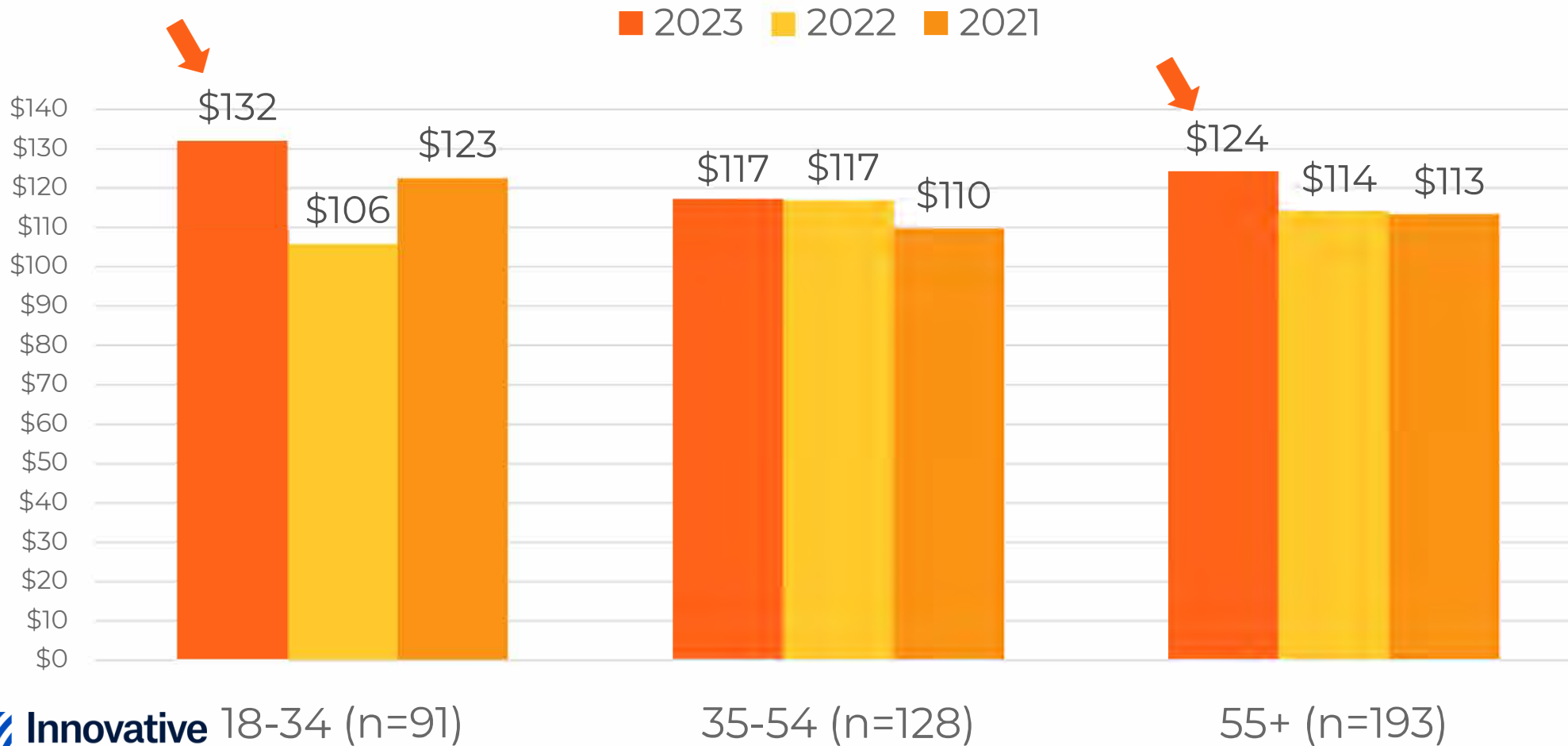
# Average Monthly Spend on TV

Q10. How much is your monthly television bill, NOT including any streaming services such as Netflix, Amazon Prime, Hulu, etc.? (n=412)



# Average Monthly Spend on TV — by Age Group

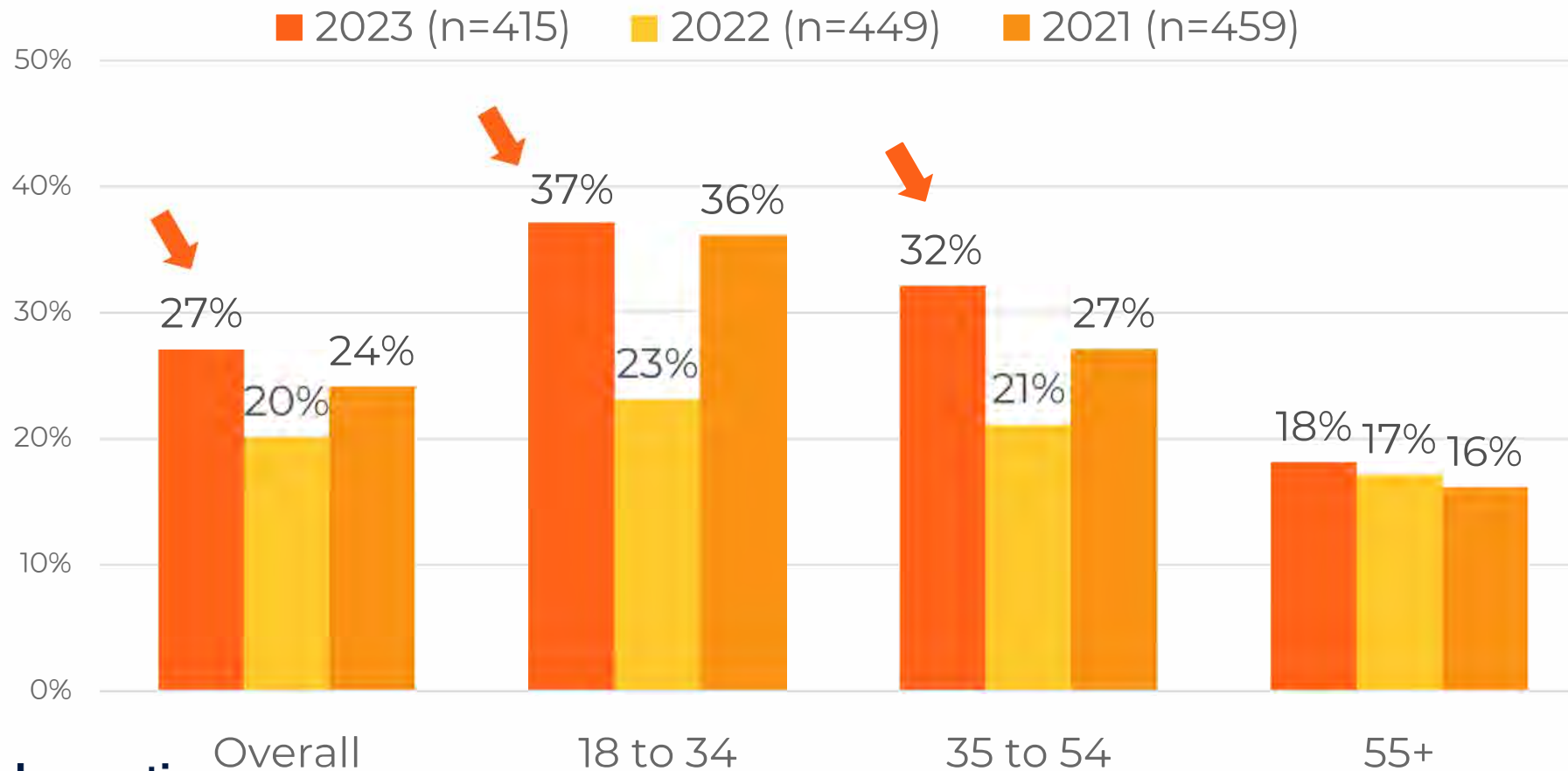
Q10. How much is your monthly television bill, NOT including any streaming services such as Netflix, Amazon Prime, Hulu, etc.?





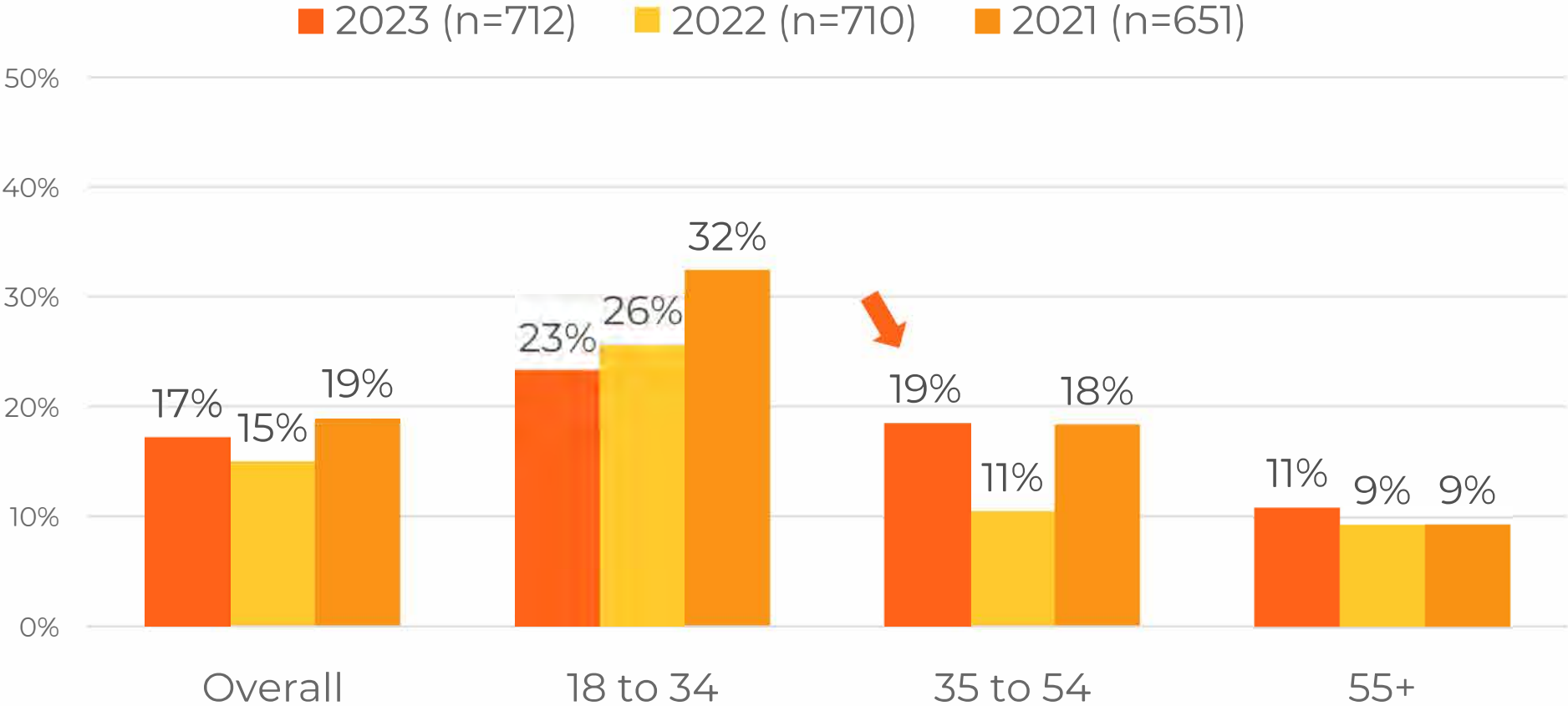
# Average Percent of Household Sports Watching

Q11. Approximately what percentage of your household's television viewing is sporting events? (open numeric; n=415) *Shown is the average percent of sports watching in the household*



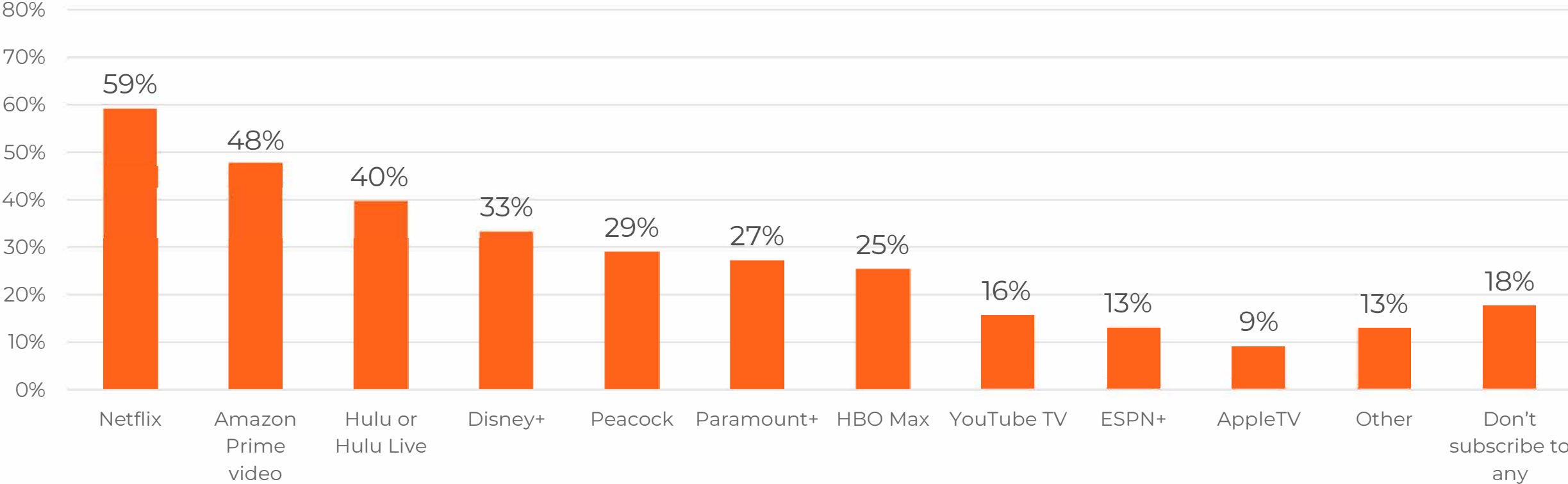
# Would You Get Enough Channels with an Antenna?

Q12. 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=712) *Percentage indicates those answering "Yes"*



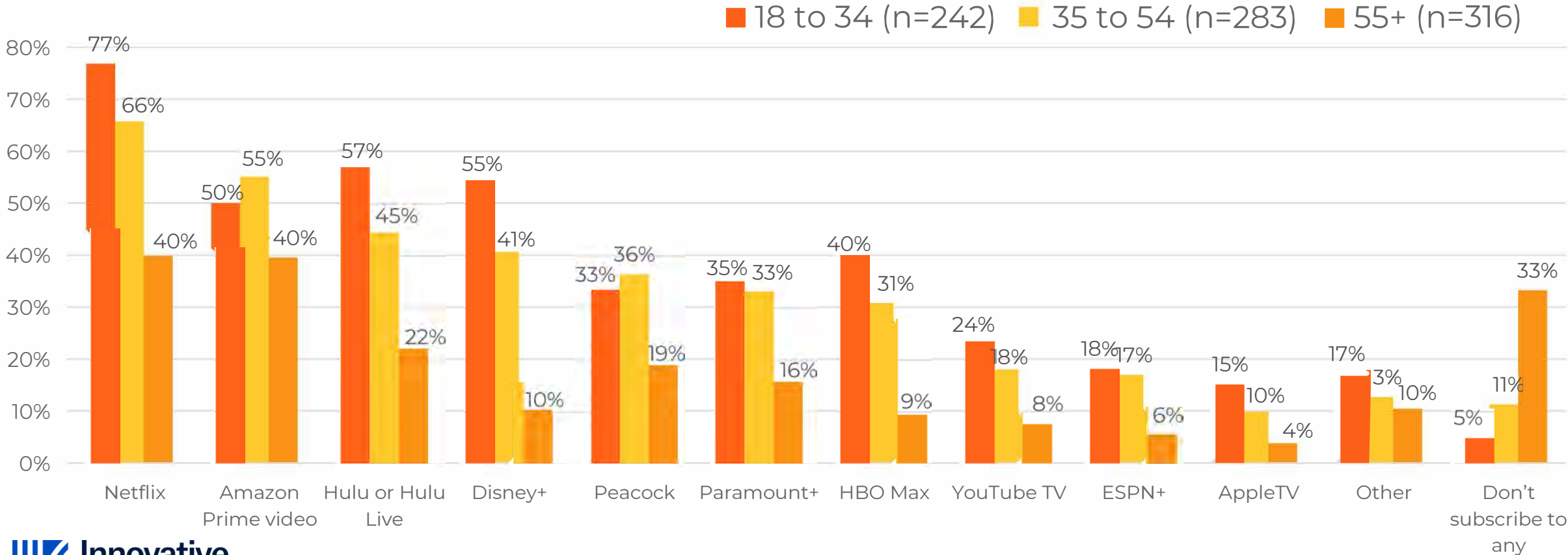
# Most Popular Streaming Services

Q13. Which of the following streaming services, if any, do you subscribe to? (n=841) *Check all that apply.*



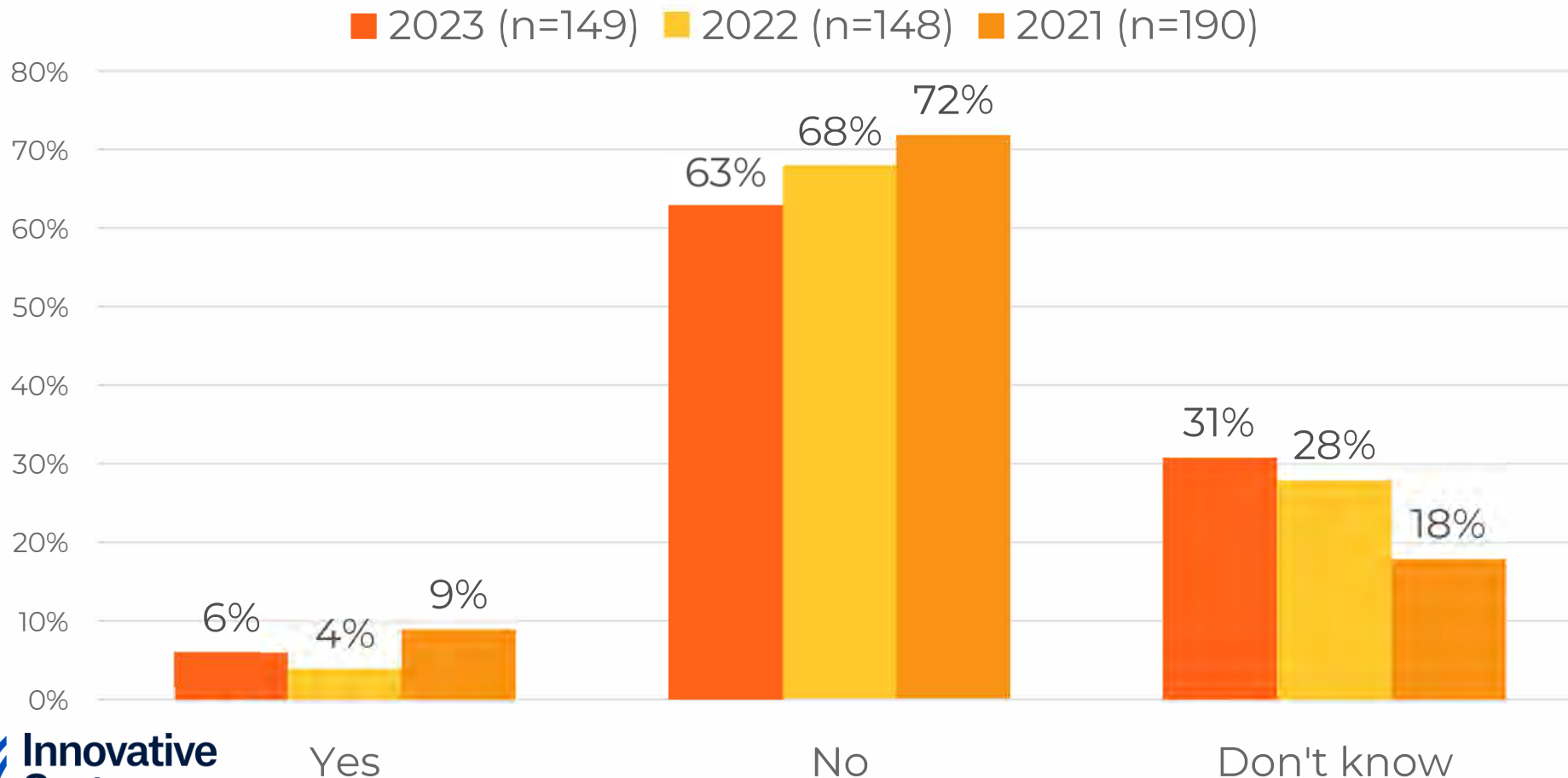
# Most Popular Streaming Services — by Age Group

Q13. Which of the following streaming services, if any, do you subscribe to? *Check all that apply.*



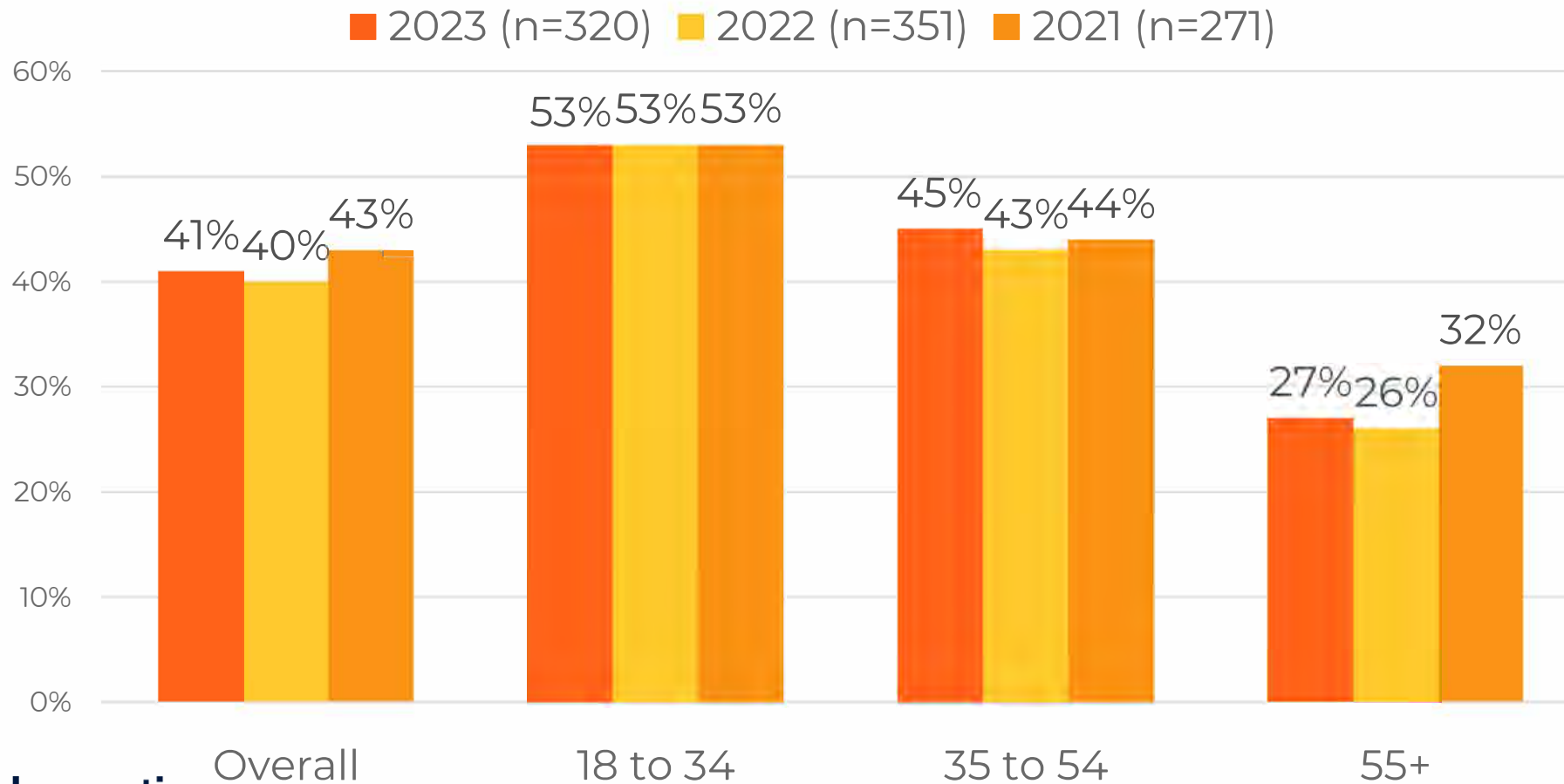
# Adding Streaming Services in the Next 12 Months?

Q14. Do you plan to subscribe to any of these streaming services in the next 12 months? *Asked of those who don't currently subscribe to any streaming services*



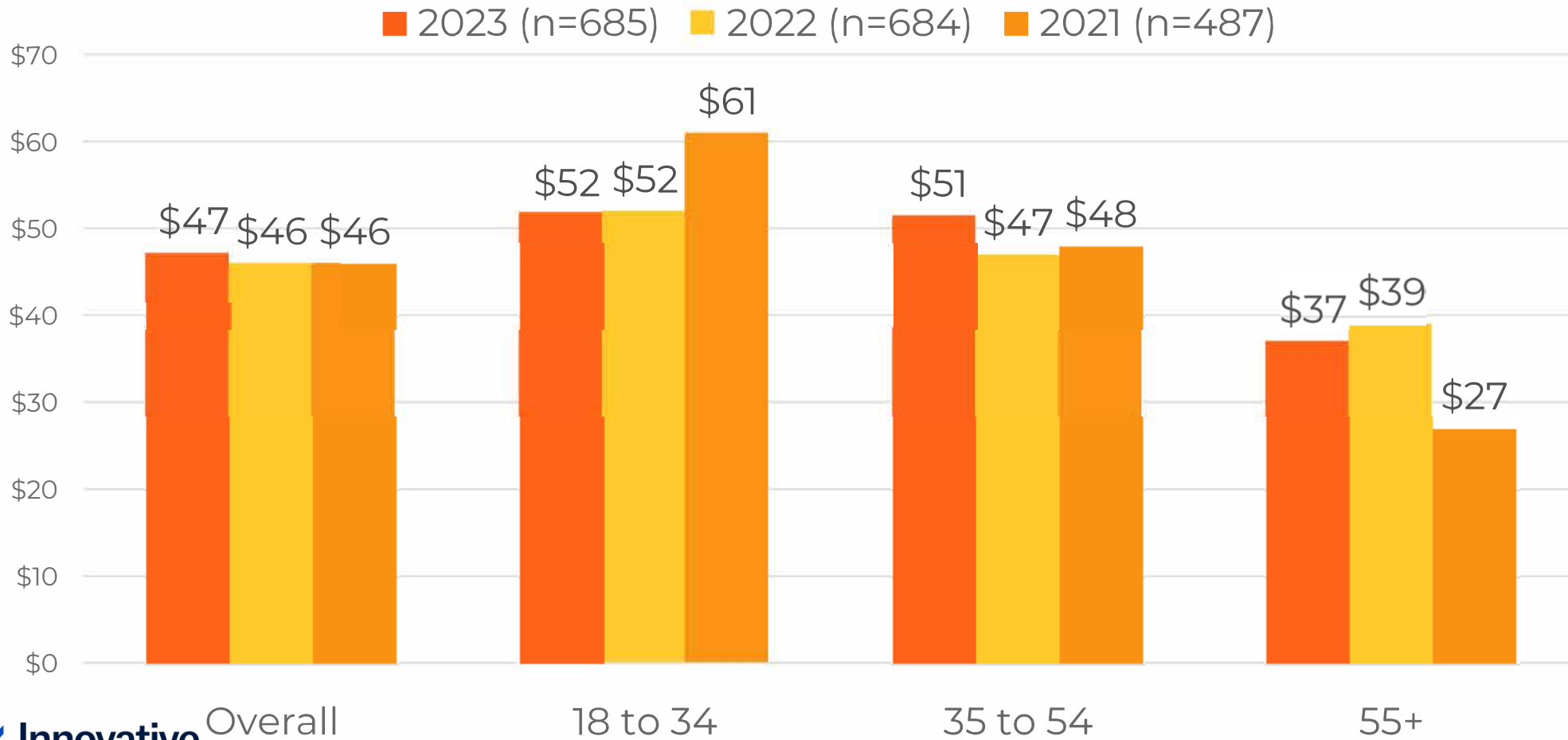
# Streaming as Percent of Household TV Watching

Q15. Approximately what percentage of your household's total television viewing is streaming?  
(open numeric box)



# Average Monthly Spend on Streaming

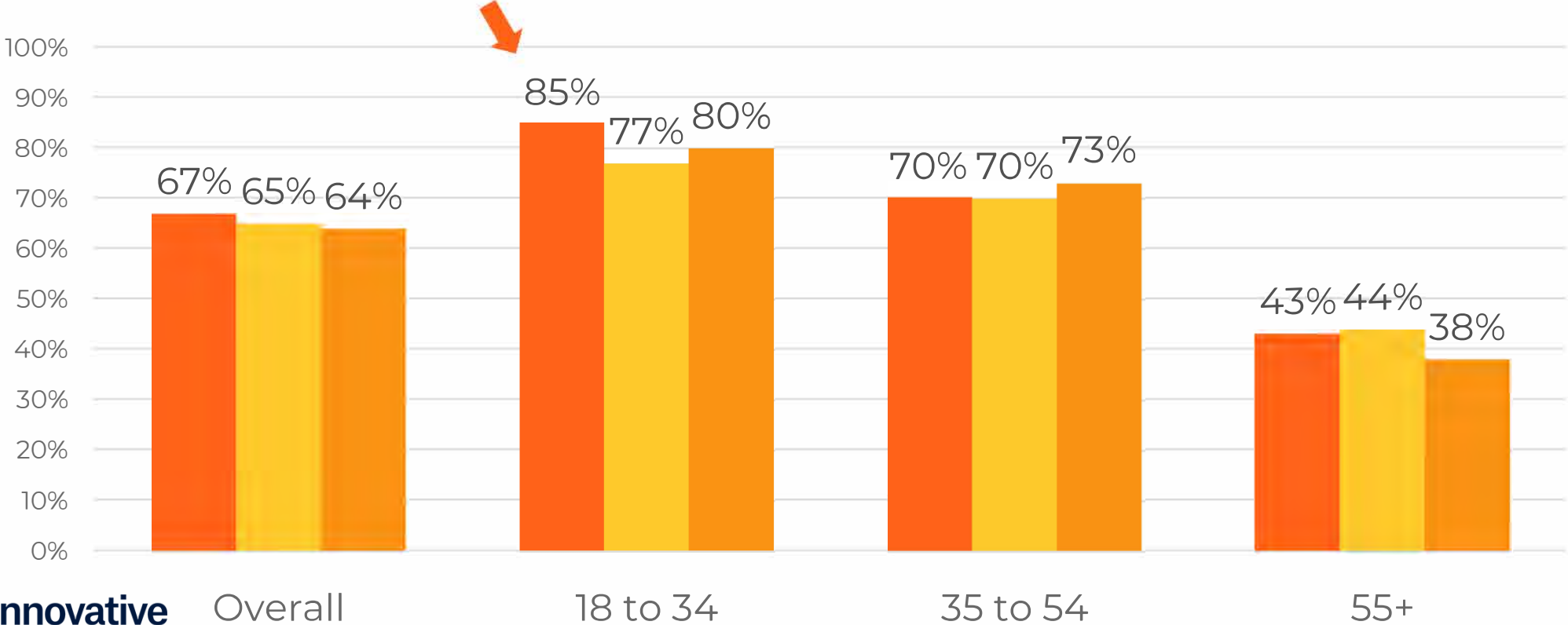
Q16. Approximately how much per month, in total, do you spend on streaming services? (n=685)



# Use of Mobile Device for Streaming

Q17. Does your household ever stream video or watch live television programs on a mobile device, such as a laptop, iPad or smartphone? (n=673) *Percentage indicates those answering "Yes"*

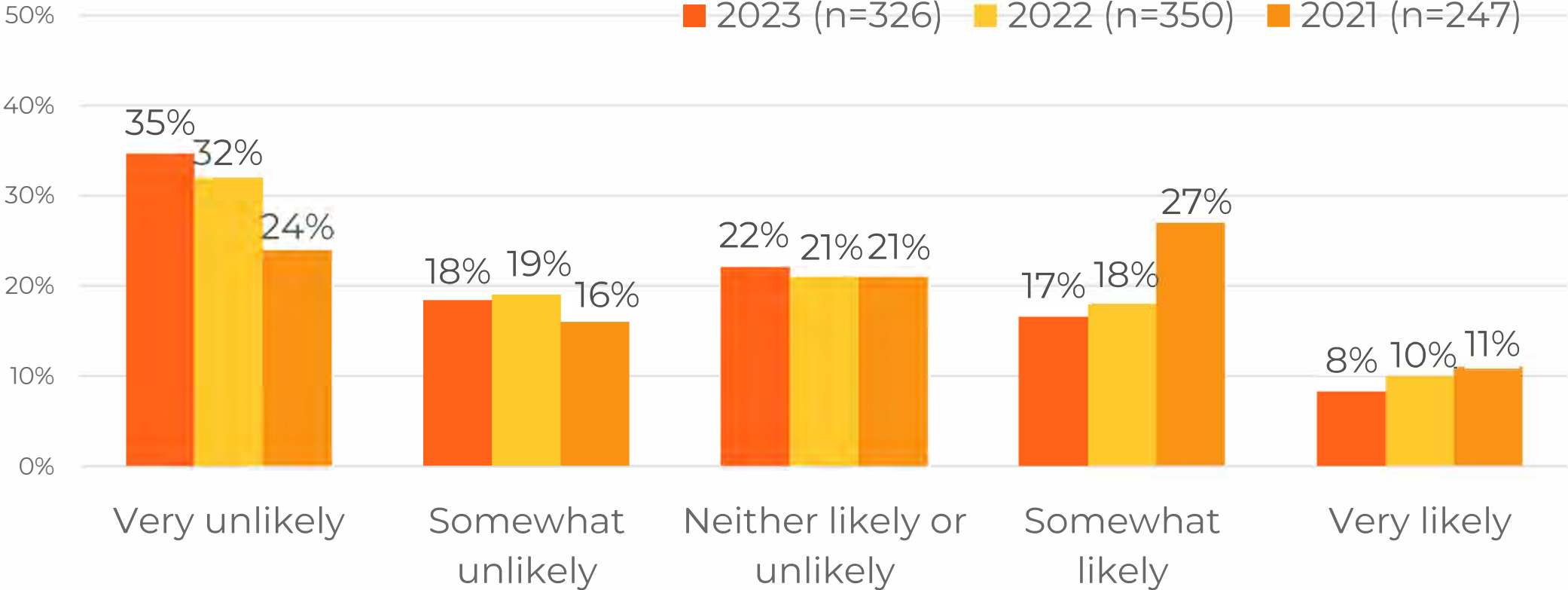
■ 2023 (n=673) ■ 2022 (n=674) ■ 2021 (n=576)





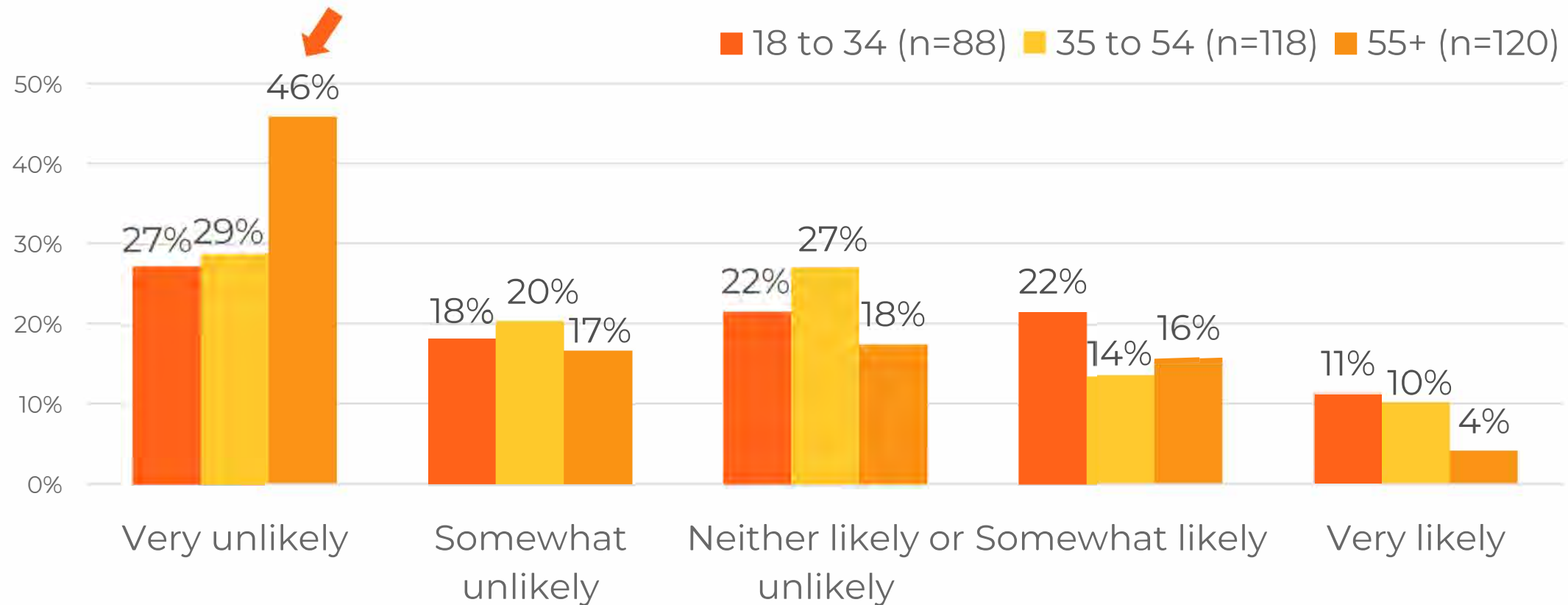
# Likelihood to Switch to Streaming Only

Q18. Within the next 12 months, how likely are you to drop your current TV provider and receive ONLY streaming services?



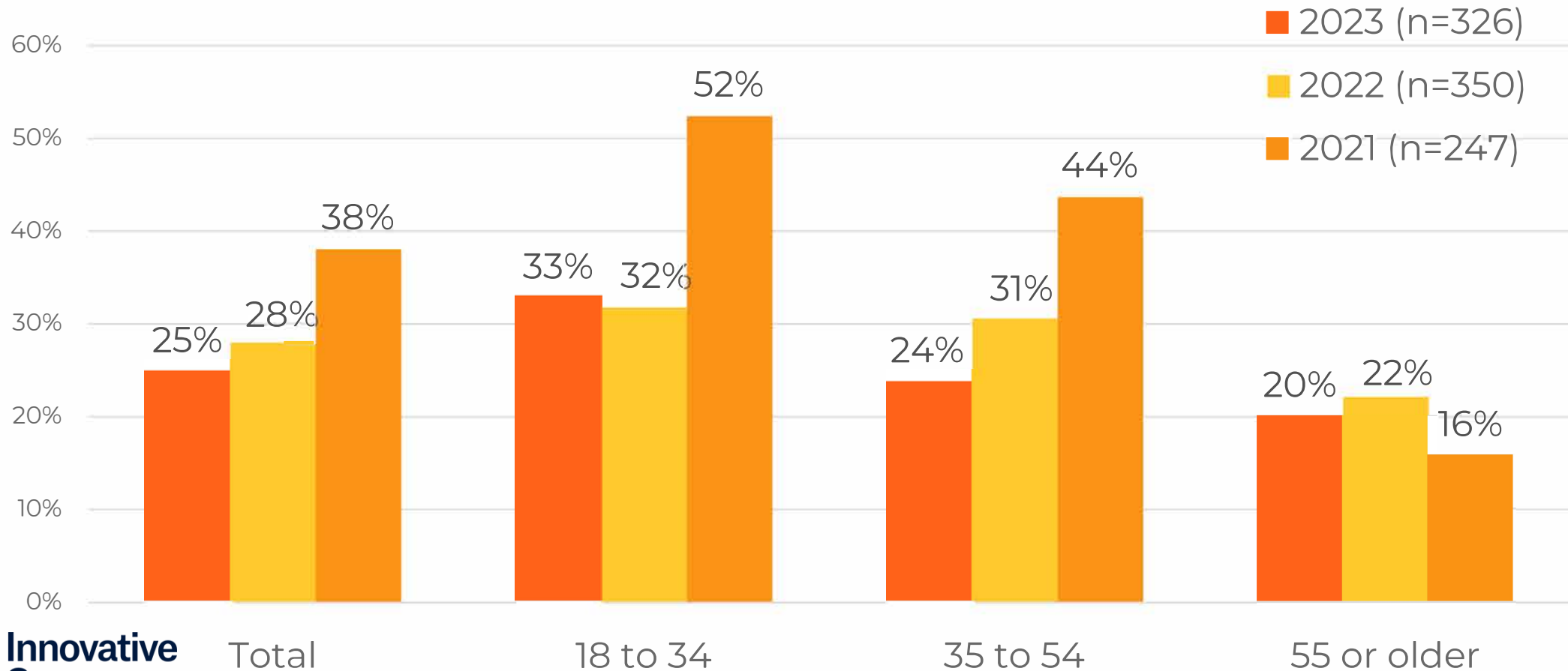
# Likelihood to Switch to Streaming Only — by Age Group

Q18. Within the next 12 months, how likely are you to drop your current TV provider and receive ONLY streaming services?



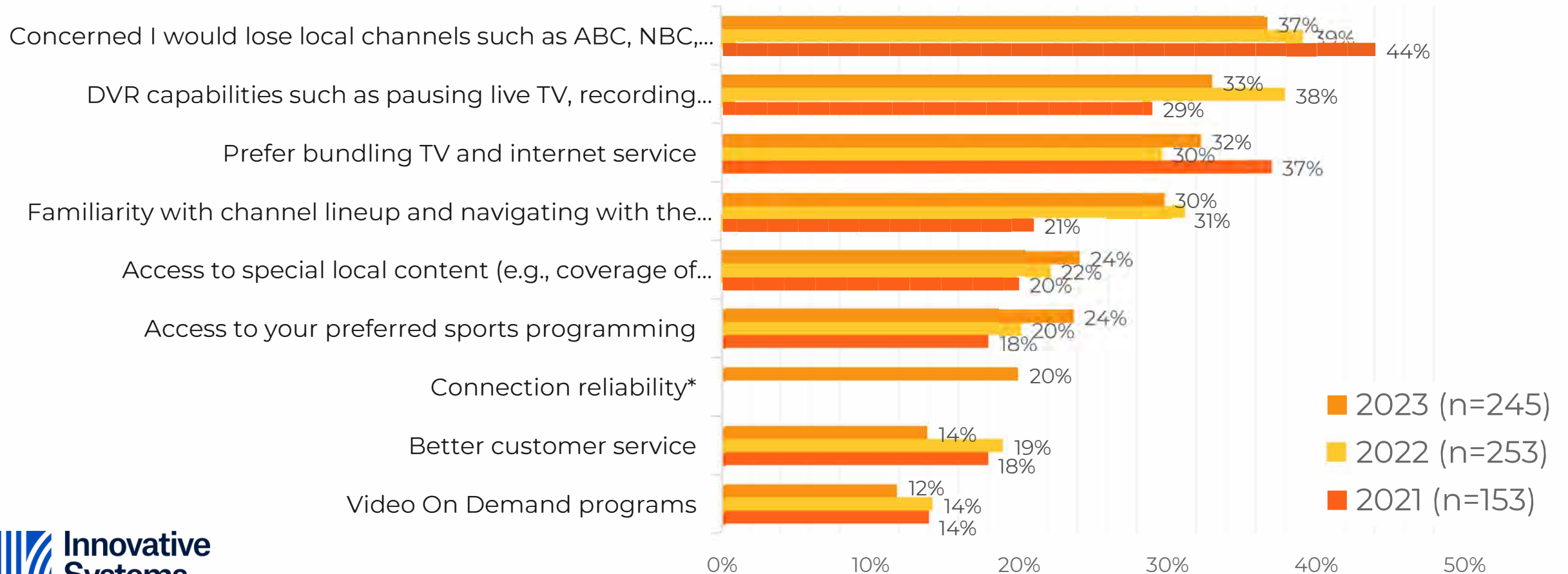
# Very or Somewhat Likely to Switch to Streaming Only

Q18. Within the next 12 months, how likely are you to drop your current TV provider and receive ONLY streaming services? Shown is the percentage saying they are very or somewhat likely to switch



# Top Reasons for Staying With TV Provider

Q19. What are the top reasons you would prefer to keep your current TV provider instead of switching to streaming only? Please select up to three..



\*Added in 2023

# Broadband

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Voice



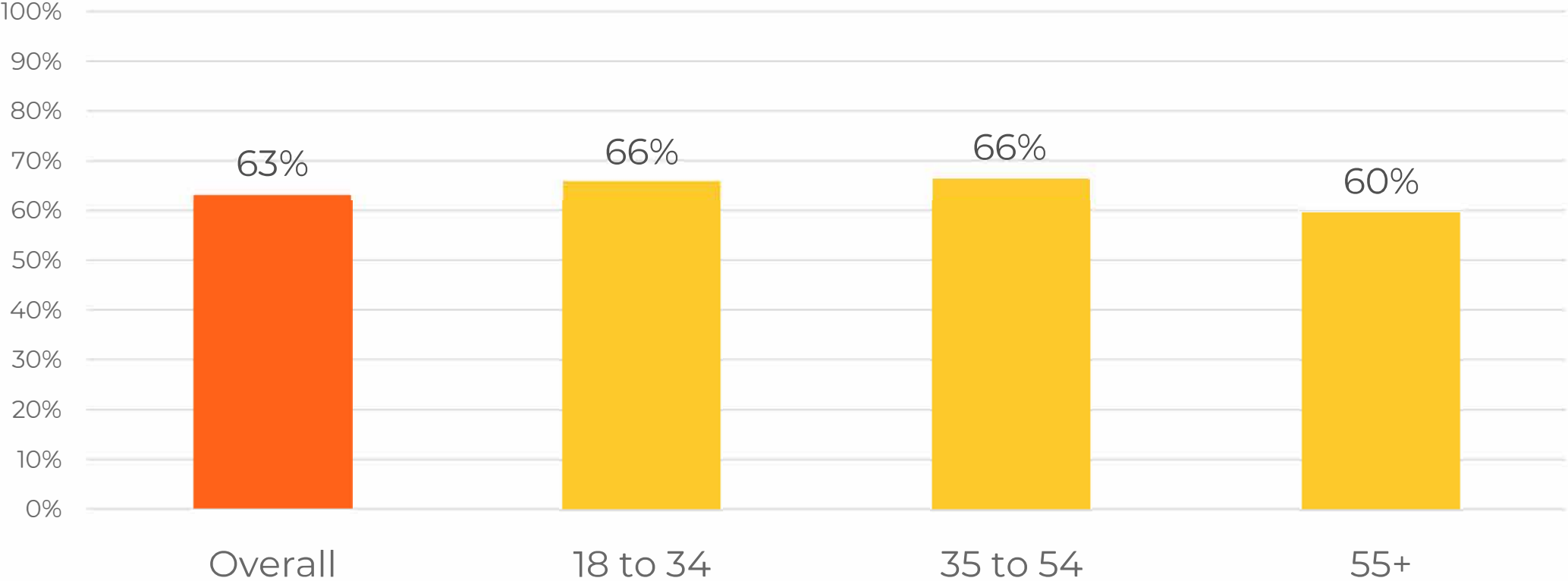
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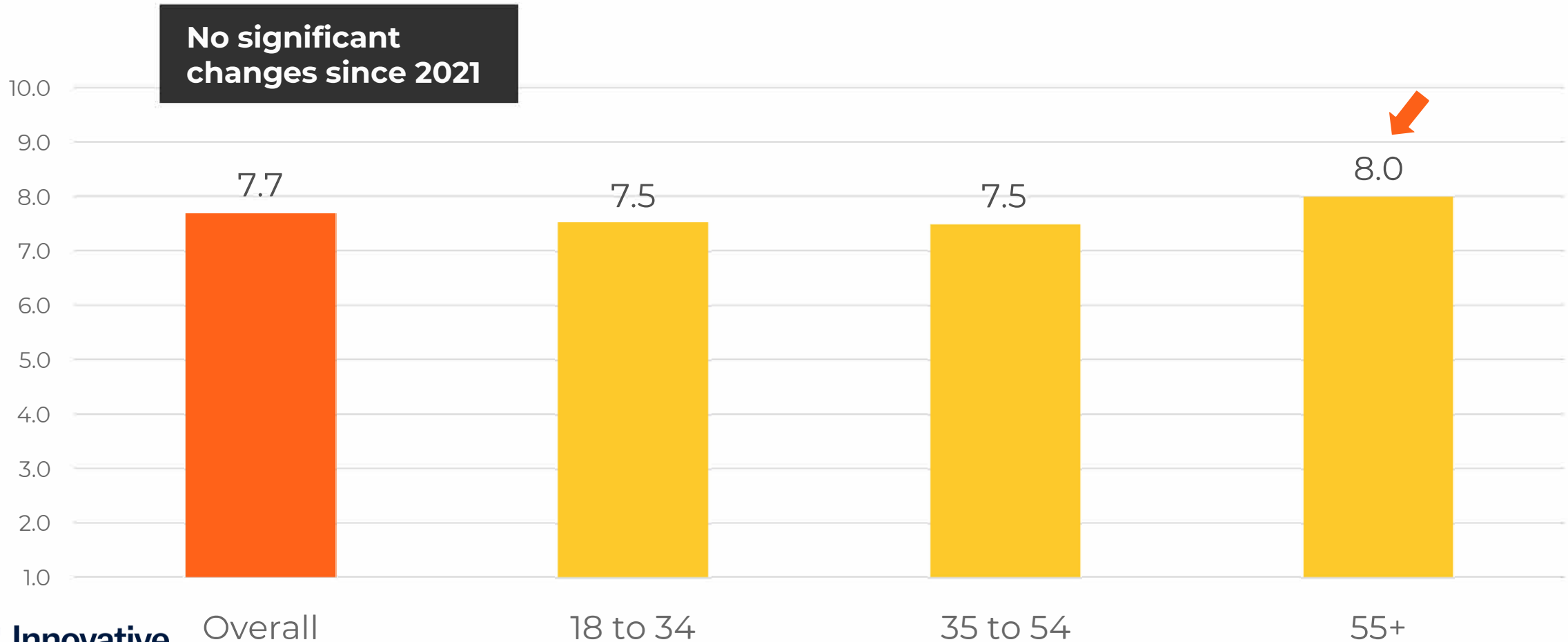
# Bundle Internet and TV Services

Q20. Is your home internet service provided by the same company that provides your TV service? (n=415)  
*Shown is the percentage answering "yes"*



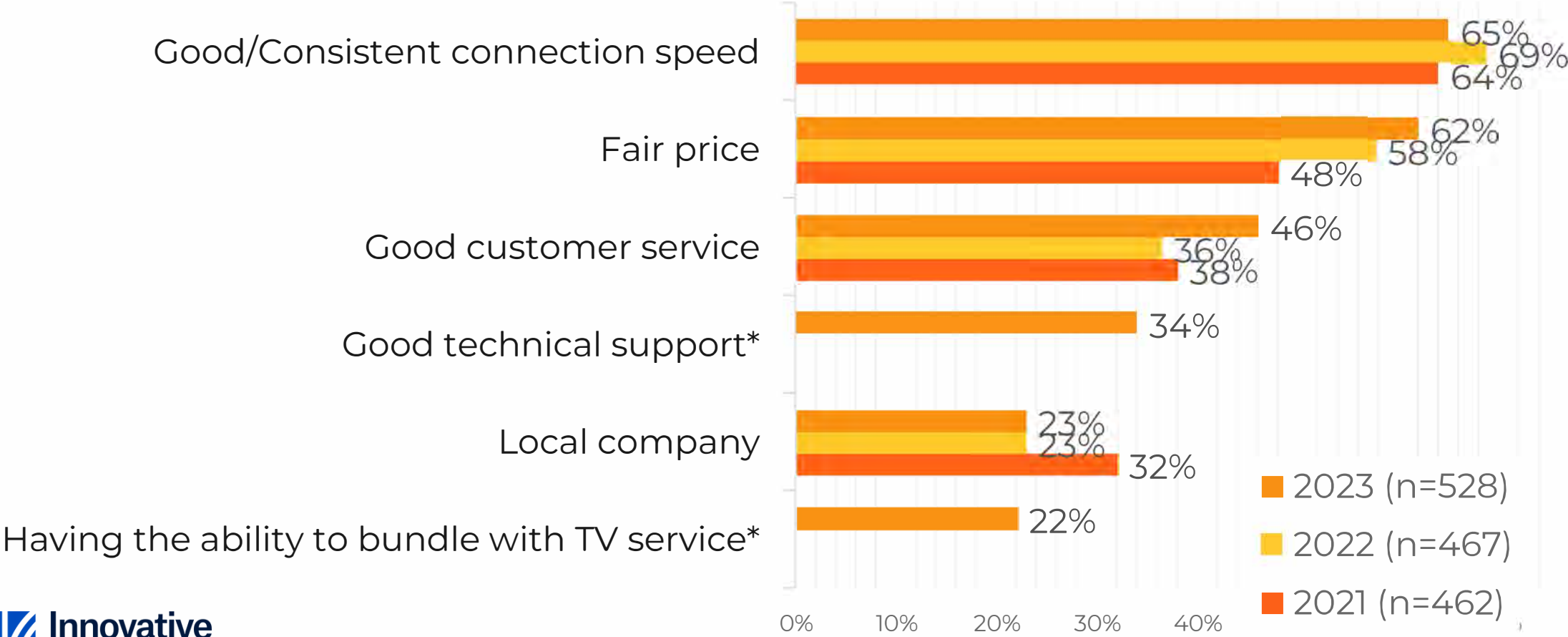
# Satisfaction with Internet Provider

Q21A. Please rate your overall satisfaction with your internet provider. (n=841) *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

Q21B. What has the greatest influence on your satisfaction with your internet provider? *Check all that apply*  
*(Asked of those who gave a rating of 8, 9, or 10 on Internet Satisfaction.)*



\*Added in 2023



# Drivers of High Internet Satisfaction — by Age Group

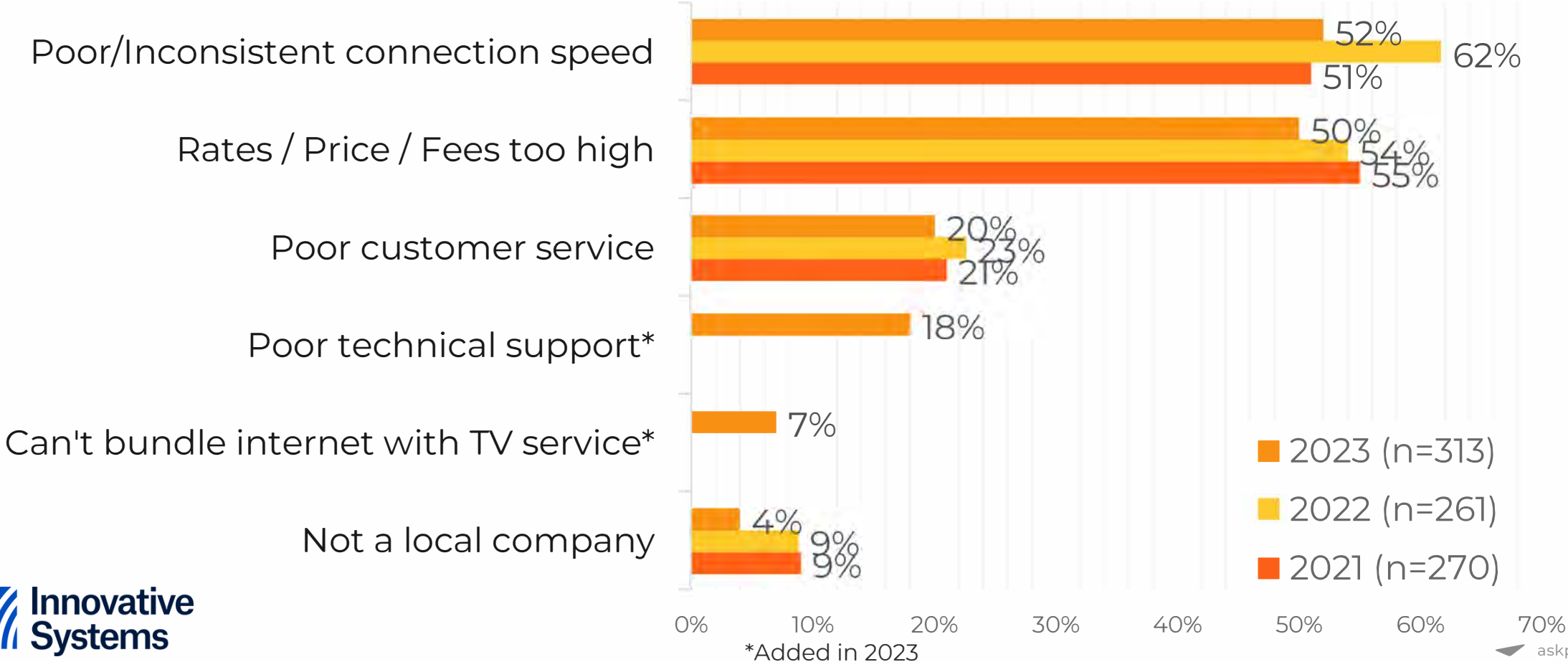
Q21B. What has the greatest influence on your satisfaction? *Check all that apply*  
*(Asked of those who gave a rating of 8, 9, or 10 on Internet Satisfaction.)*

	Total	18 to 34	35 to 54	55+
Total Answering:	528	137	167	224
Good / Consistent connection speed	65%	61%	68%	65%
Fair price	62%	72%	61%	55%
Good customer service	46%	50%	46%	44%
Good technical support	34%	42%	29%	32%
Local company	23%	25%	21%	23%
Having the ability to bundle with TV service	22%	16%	21%	25%
Other	2%	3%	2%	2%

\*Cells shaded yellow are significantly higher; cells shaded orange are significantly lower.

# Drivers of Low Internet Satisfaction

Q21C. 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.)*



# Drivers of Low Internet Satisfaction — by Age Group

Q21C. 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.)*

	Total	18 to 34	35 to 54	55+
Total Answering:	313	105	116	92
Poor / Inconsistent connection speed	52%	54%	47%	58%
Rates / Price / Fees too high	50%	42%	51%	60%
Poor customer service	20%	18%	25%	15%
Poor technical support	18%	19%	15%	21%
Can't bundle internet with TV service	7%	8%	8%	4%
Not a local company	4%	7%	3%	3%
Other	7%	3%	6%	12%

\*Cells shaded yellow are significantly higher; cells shaded orange are significantly lower.

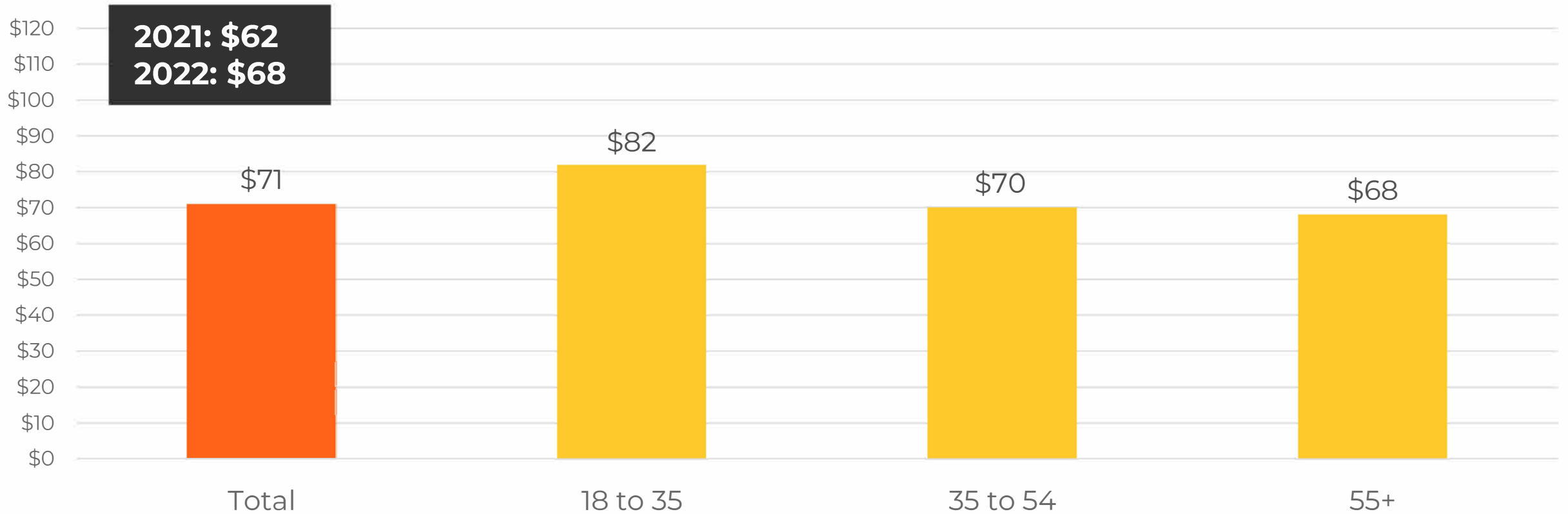
# Average Current Spend on Internet and TV Bundle

Q22. What is the approximate amount you're paying per month for your TV and internet service bundle? (n=239)



# Average Current Spend on Internet Alone

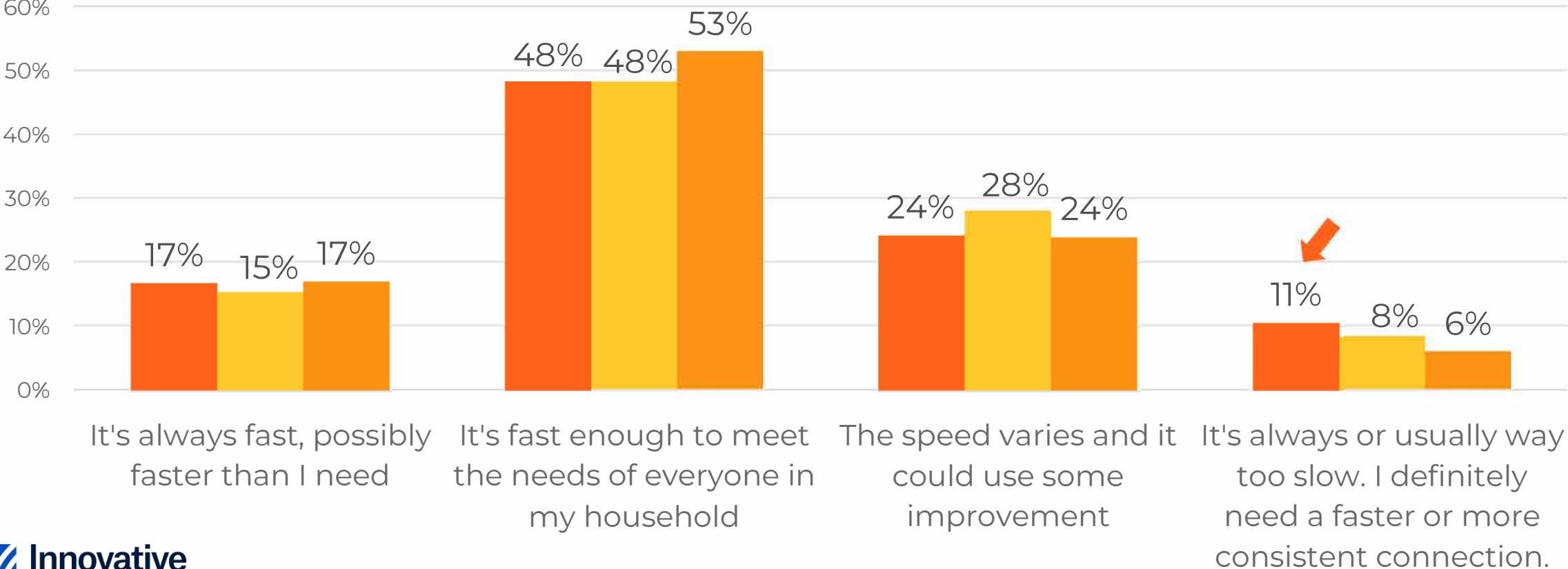
Q23. What is the approximate amount you're paying per month for just your internet service? (n=138)



# Opinions of Home Internet Speed

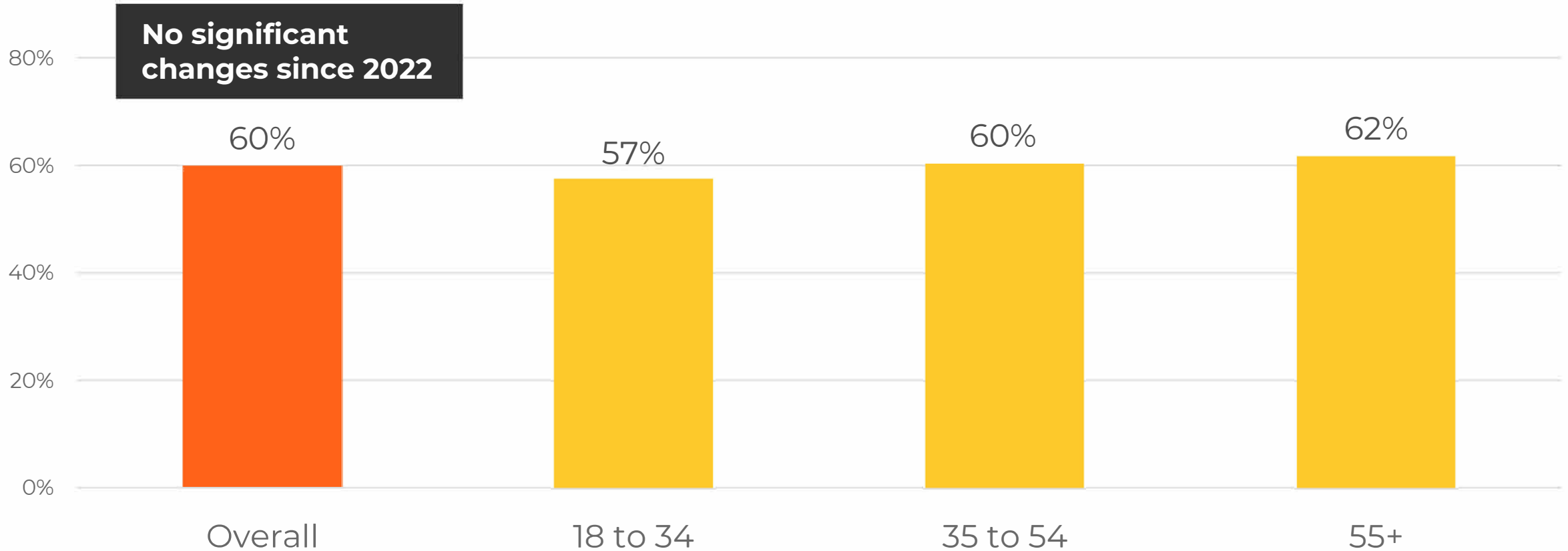
Q24. Which one of the following best describes your opinion about your home internet speed?

2023 (n=841) 2022 (n=728) 2021 (n=737)



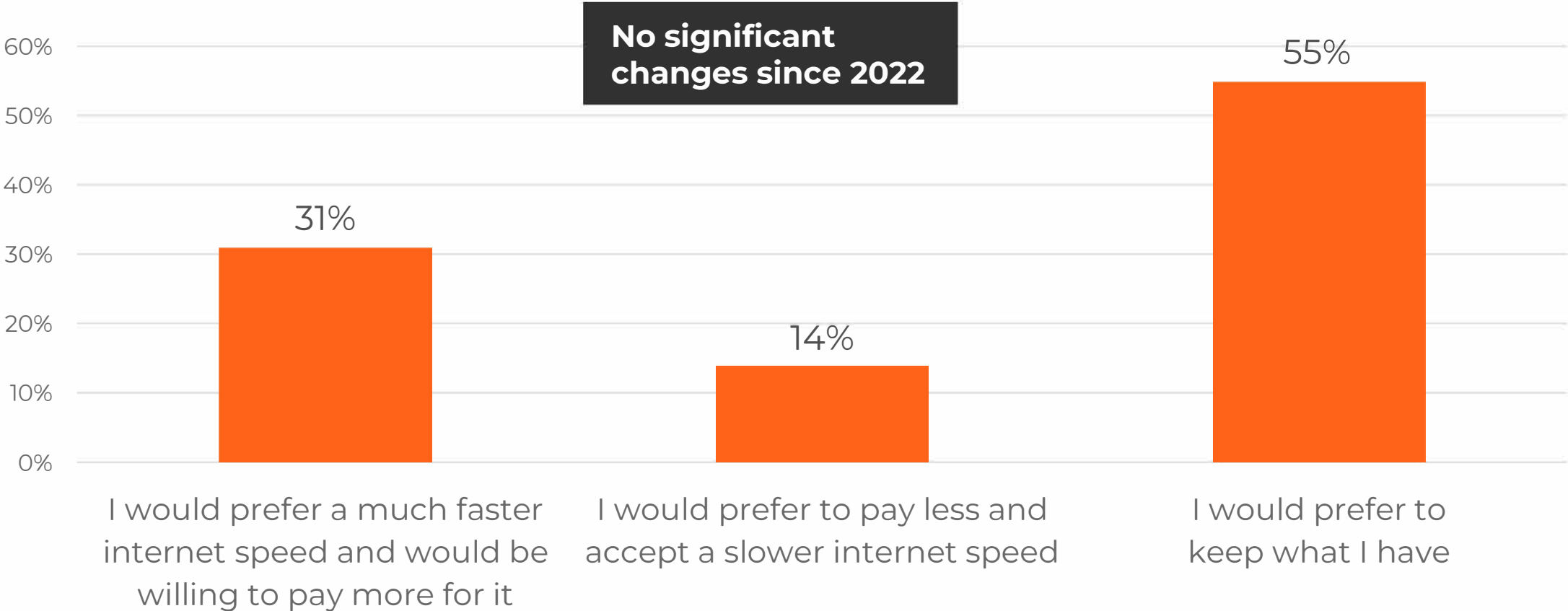
# Aware that Faster Speeds are Available

Q25. That you know of, are there internet speeds available to you that are faster than the speed you are getting now, whether from your current provider or a different one? *Percentage indicates those answering "Yes"*



# Preference for Faster Speed or Lower Price

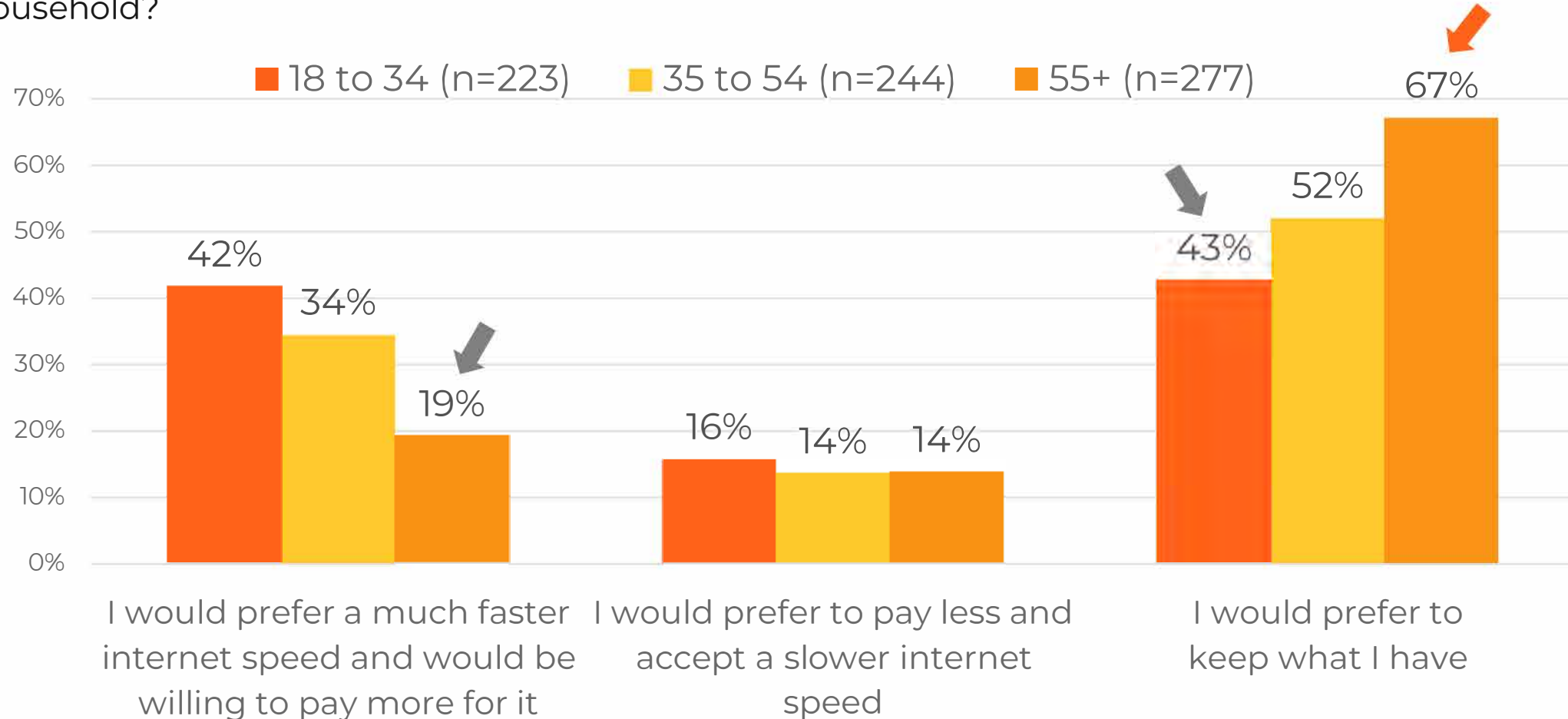
Q26. Compared to what you're paying for internet now, which of the following would you prefer for your household? (n=744)





# Preference for Faster Speed or Lower Price — by Age Group

Q26. Compared to what you're paying for internet now, which of the following would you prefer for your household?



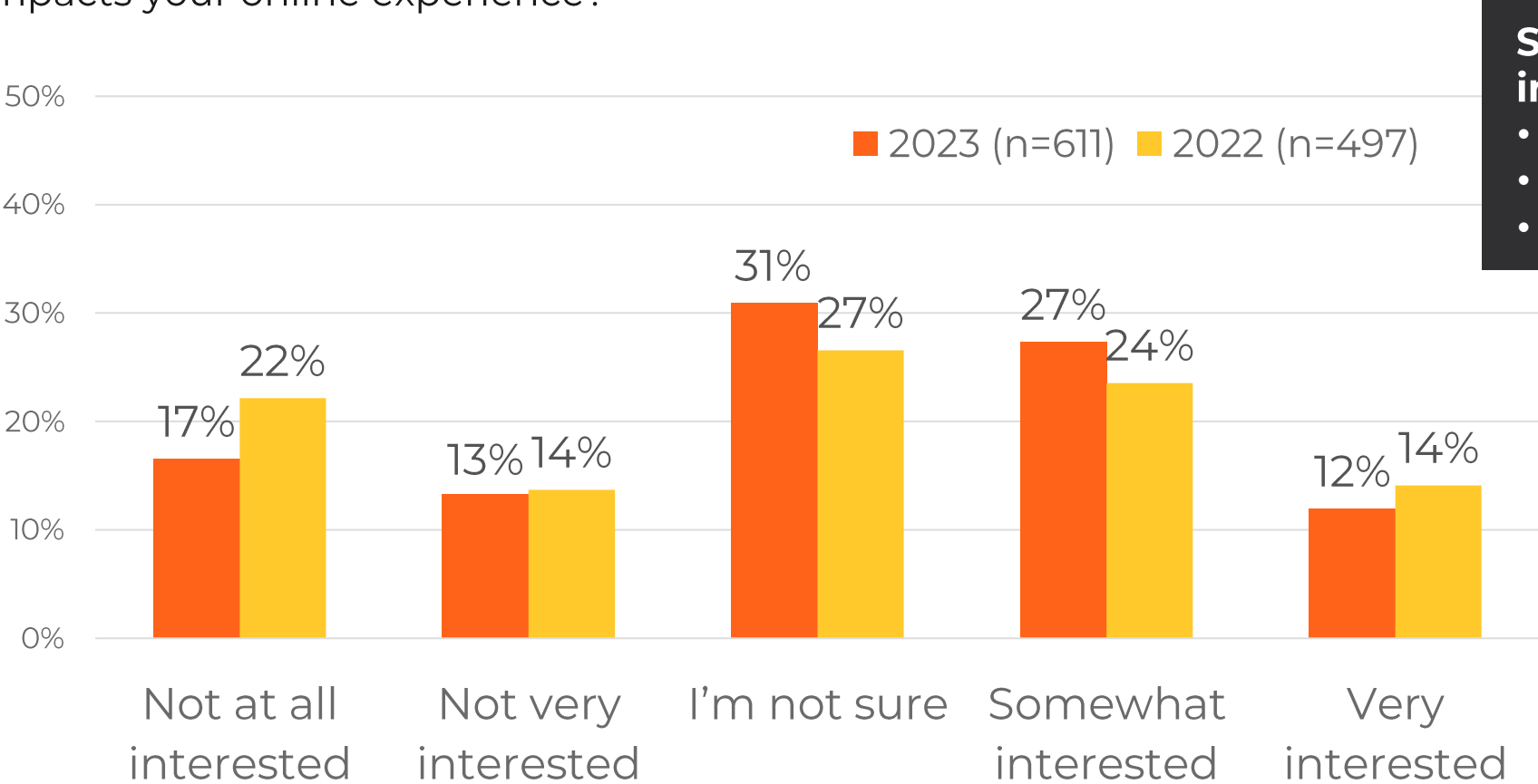
# Amount Willing to Spend for Faster Internet

Q27. How much are you willing to pay per month (in total) for internet service that is much faster than you're getting now? (n=225)



# Interest in a Free Trial

Q28A. 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?

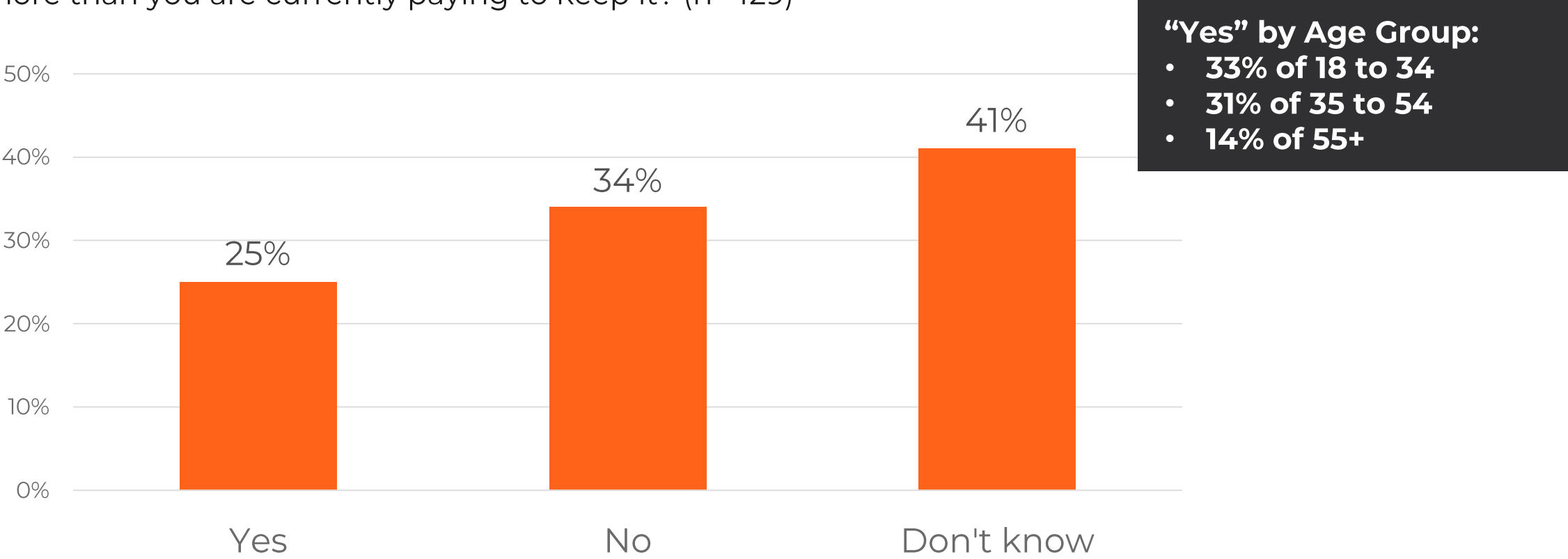


**Somewhat + very interested by age:**

- 42% of 18 to 34
- 44% of 35 to 54
- 34% of 55+

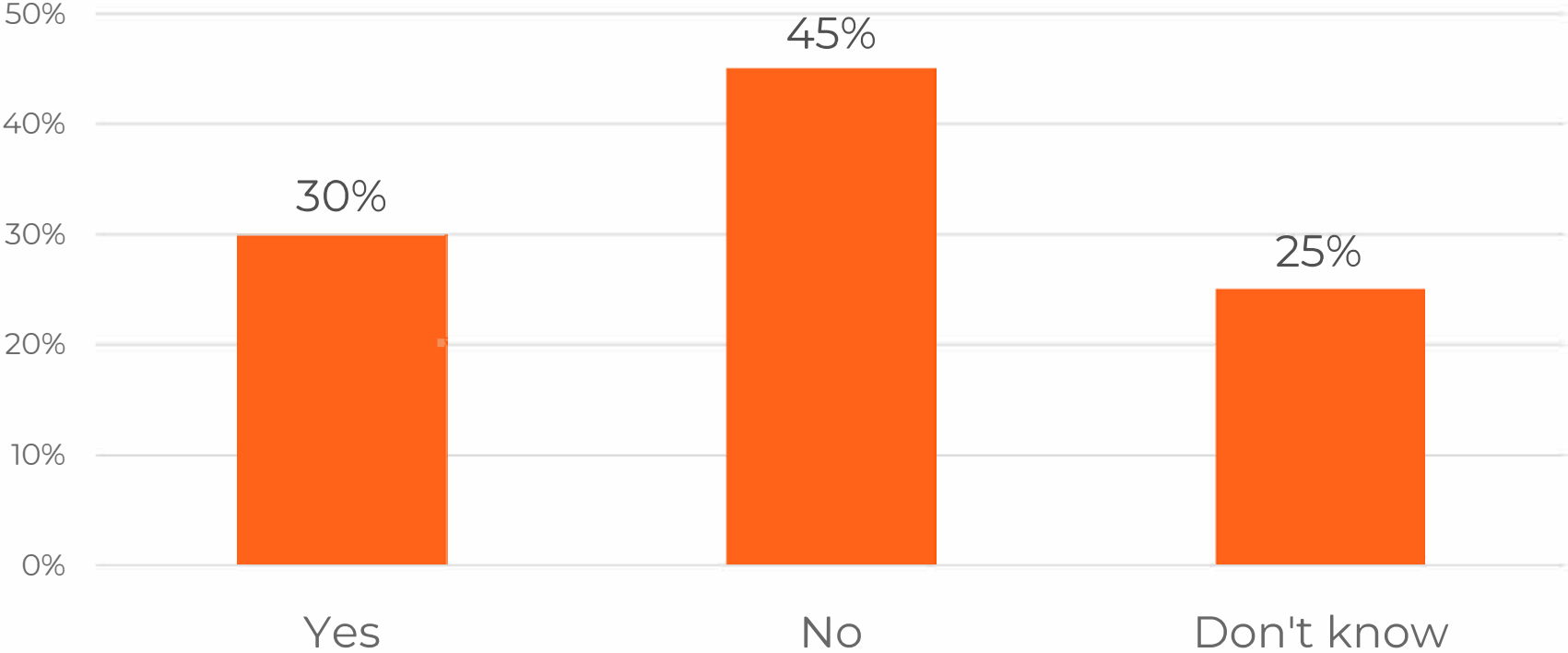
# Interest in Paying for Faster Speeds

Q28B. If you experienced significantly faster internet speed during the free trial, would you be willing to pay more than you are currently paying to keep it? (n=429)



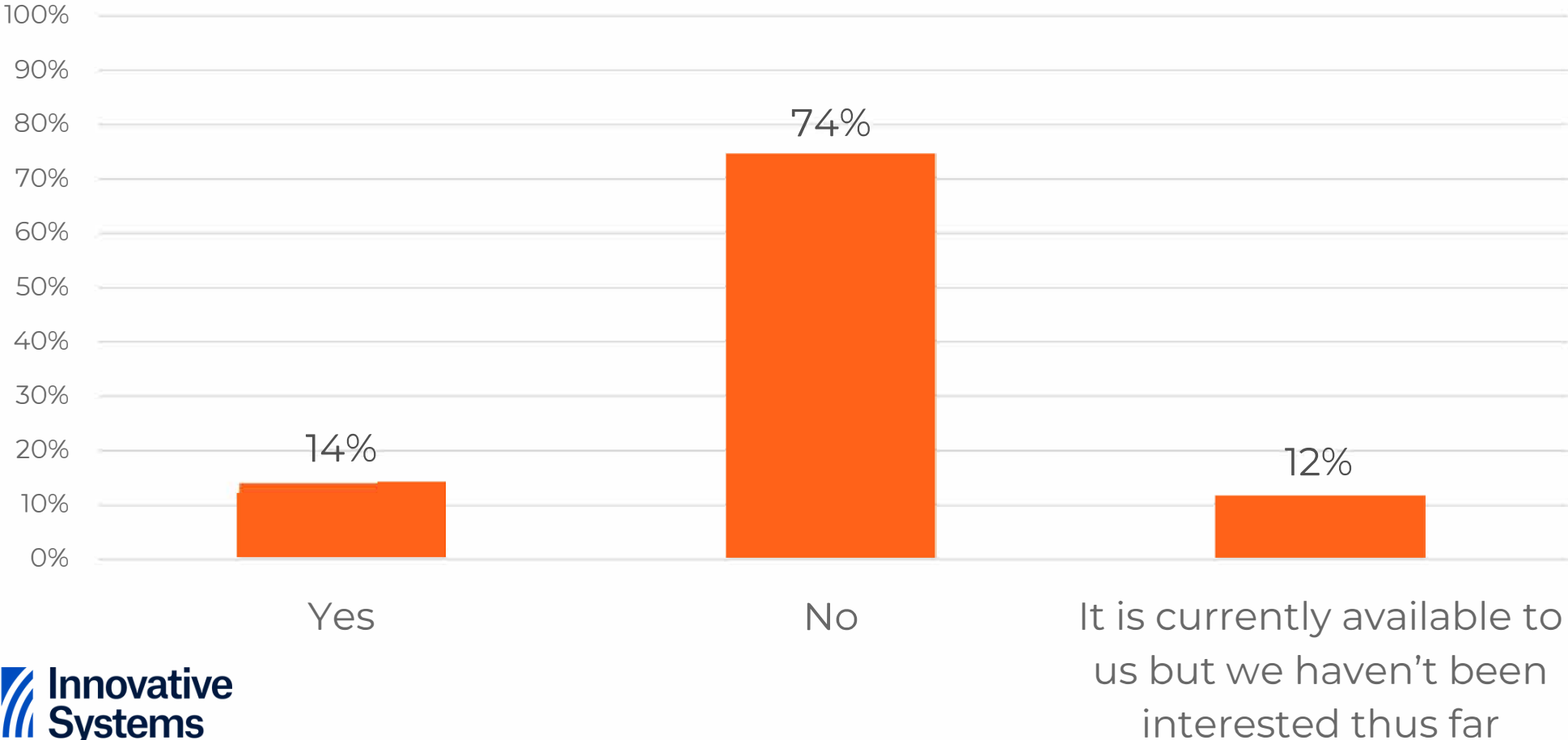
# Have Fiber Internet Connection

Q29A. Is your home internet service delivered via fiber optic connection? (n=841)



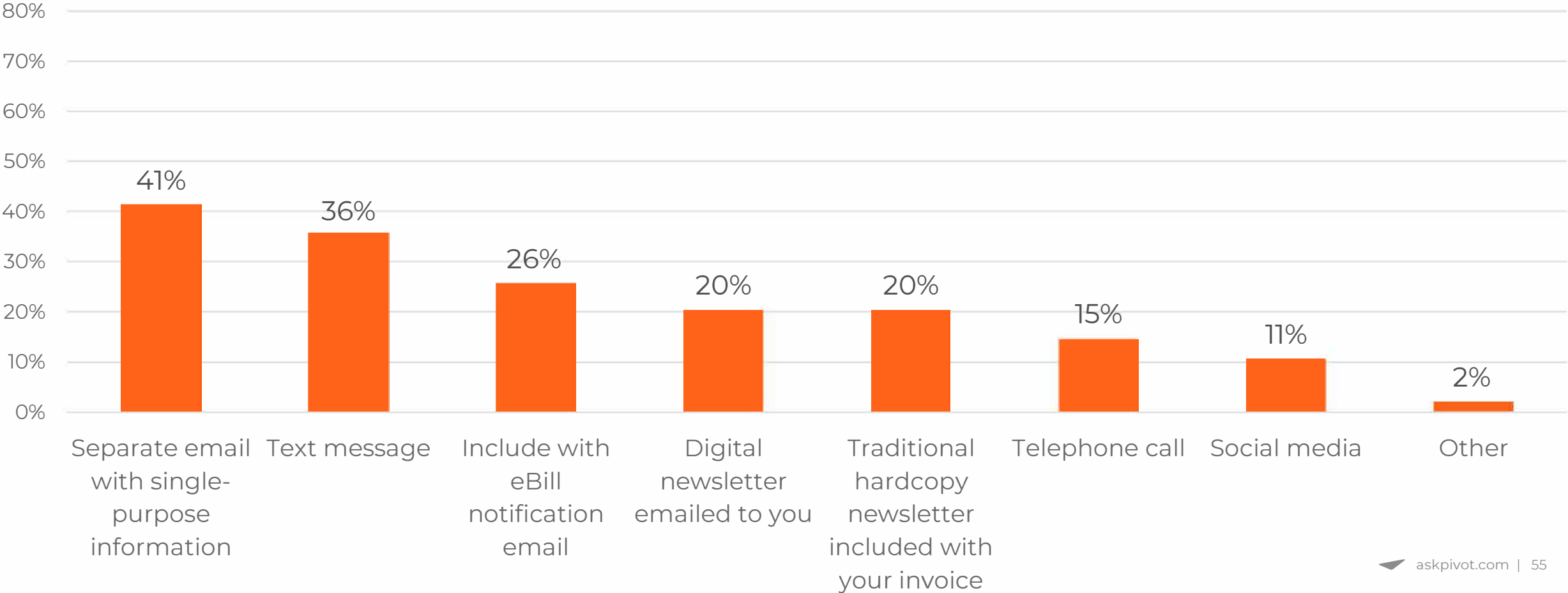
# Received Notification of Fiber Availability

Q29B. Have you received, or do you recall seeing or hearing, any notification that fiber internet is coming to your area? (n=590)



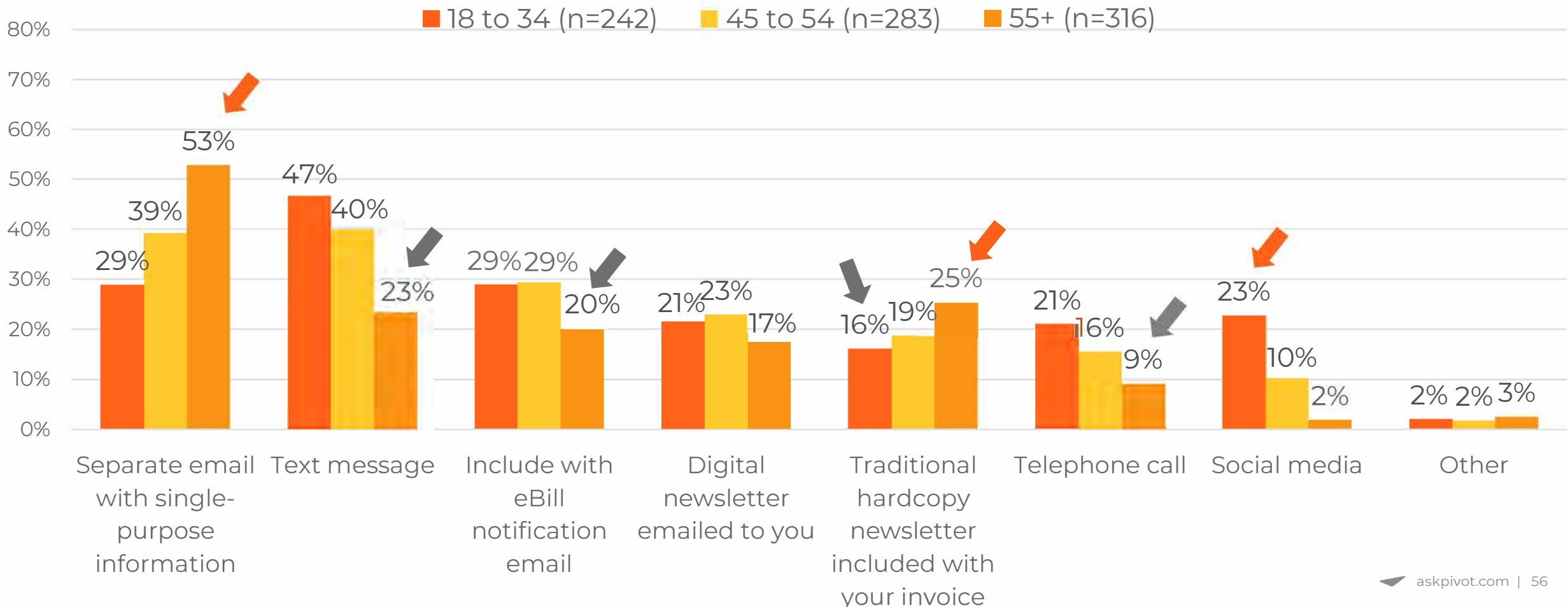
# Preferred Method of Product/Service Notifications

Q39. If your internet provider announces a new product/service or new information about existing products/services, how do you prefer to be notified? (n=841) *Check all that apply.*



# Preferred Method of Product/Service Notifications – by Age Group

Q39. If your internet provider announces a new product/service or new information about existing products/services, how do you prefer to be notified? (n=841) *Check all that apply.*





# Wi-Fi

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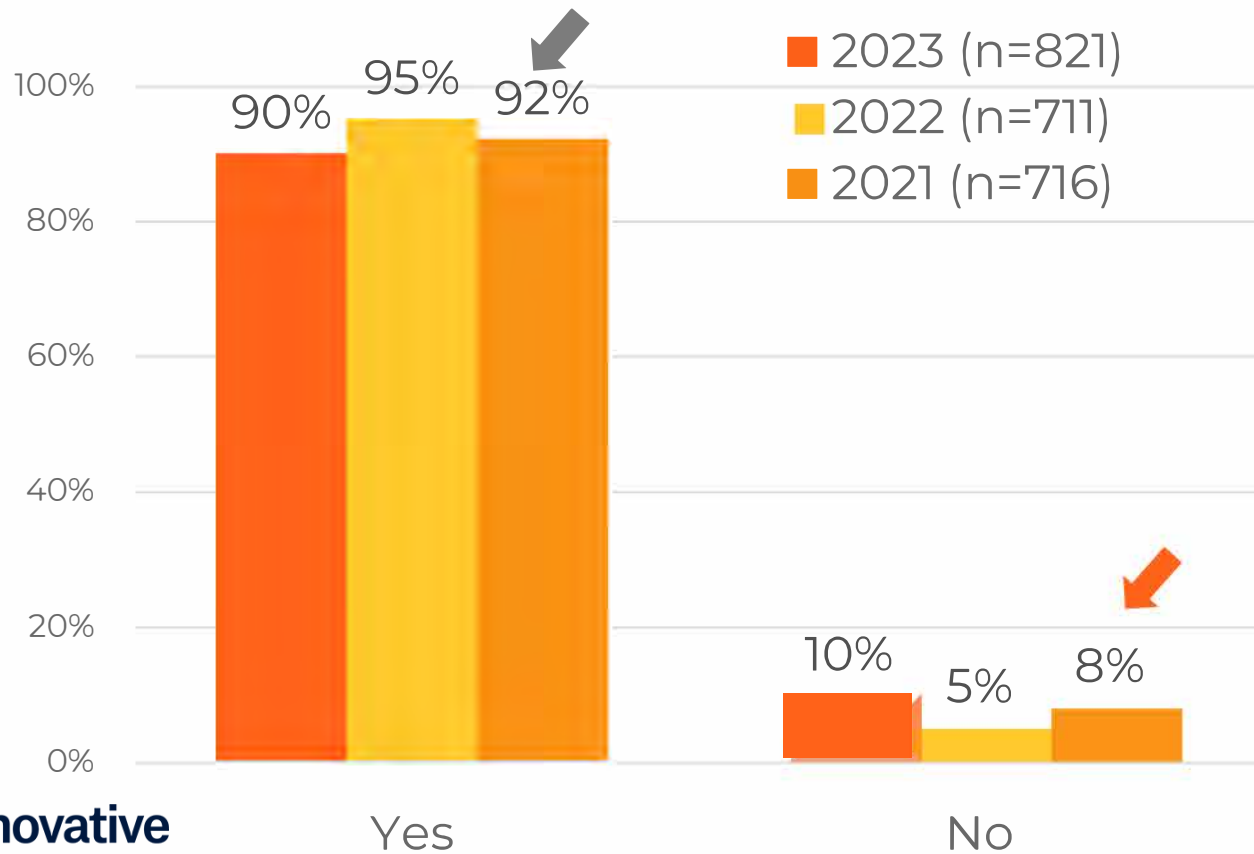
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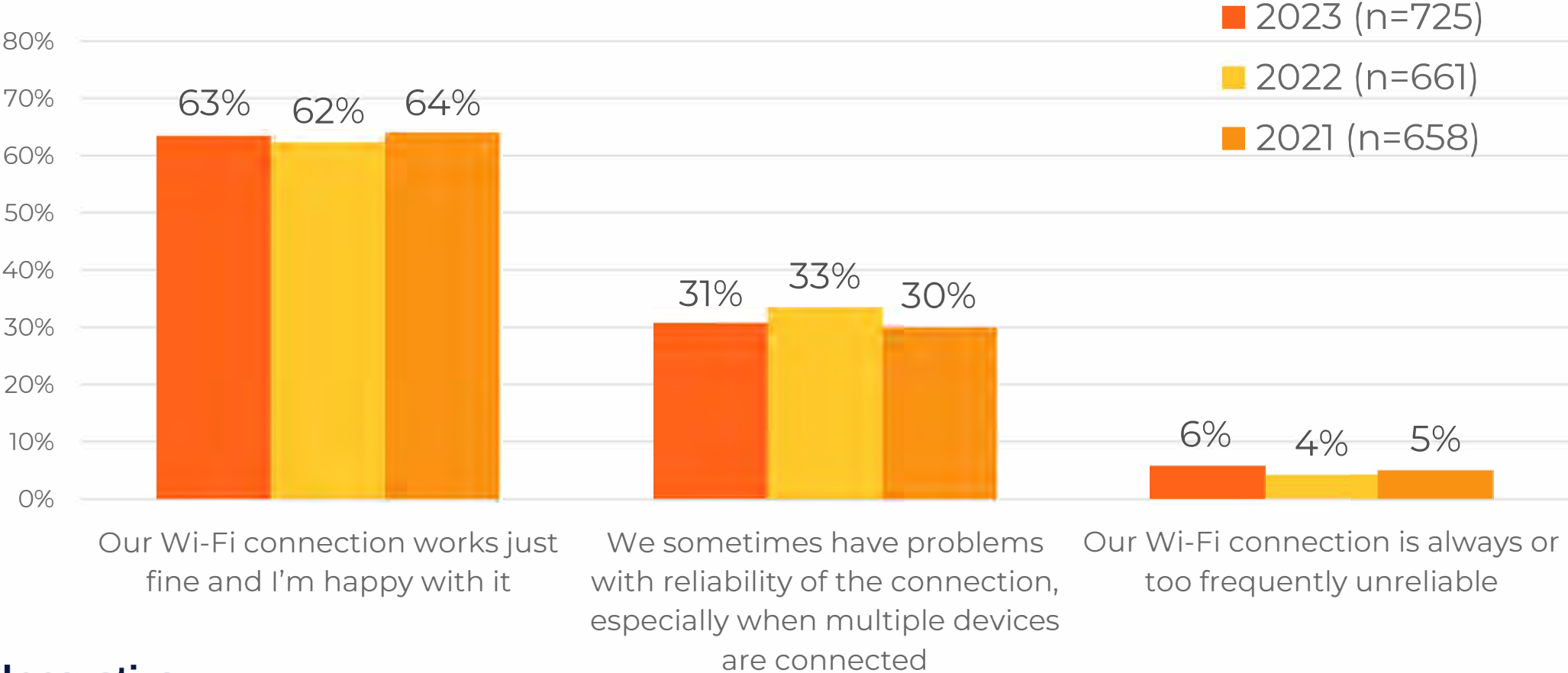
# Wi-Fi in the Home

Q30. Do you have Wi-Fi in your home? (i.e., you connect to the internet wirelessly using a wireless router placed somewhere in your home.)



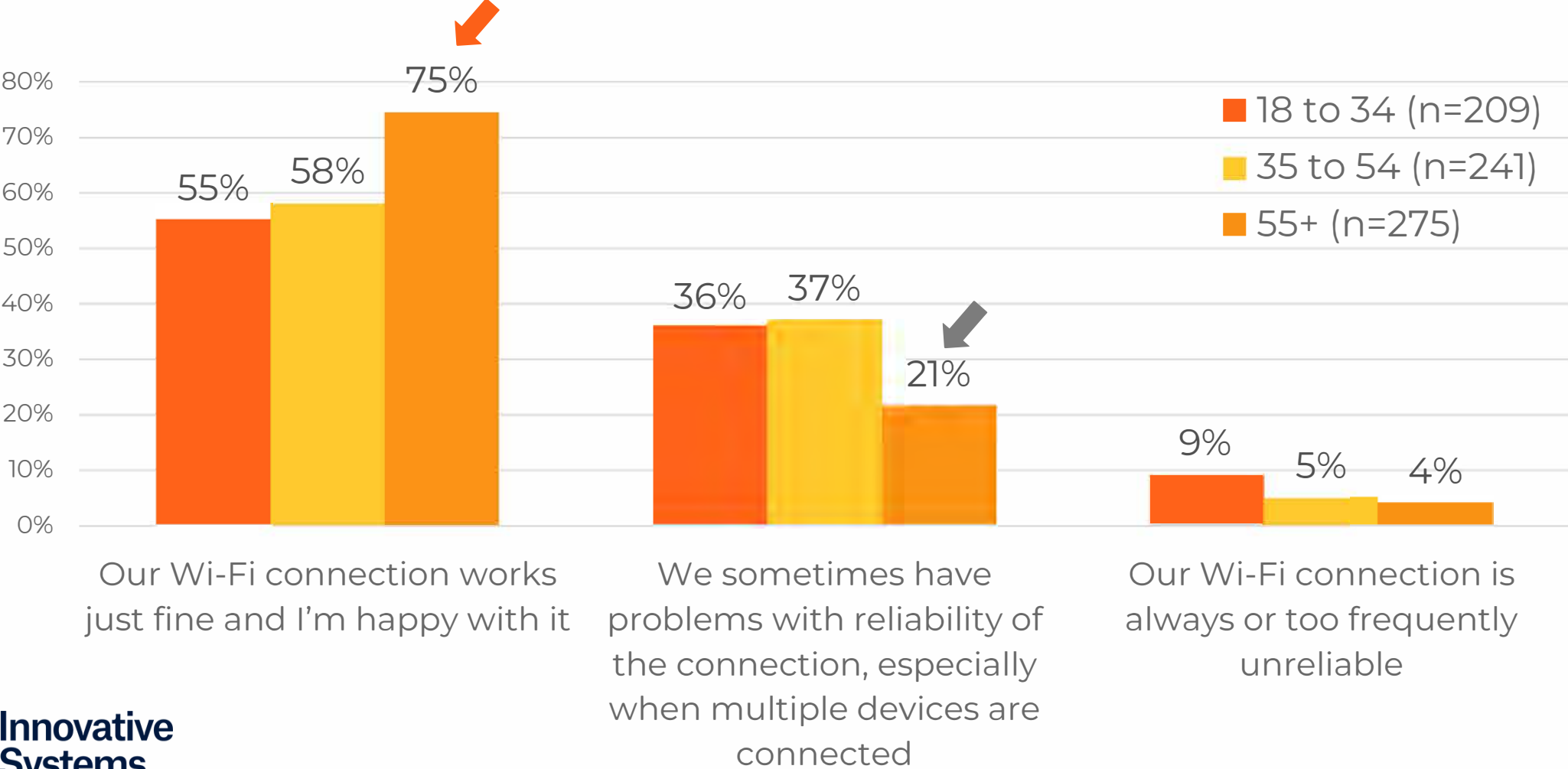
# Opinions on Wi-Fi Experience

Q31. Which one of the following best describes your Wi-Fi experience at home?



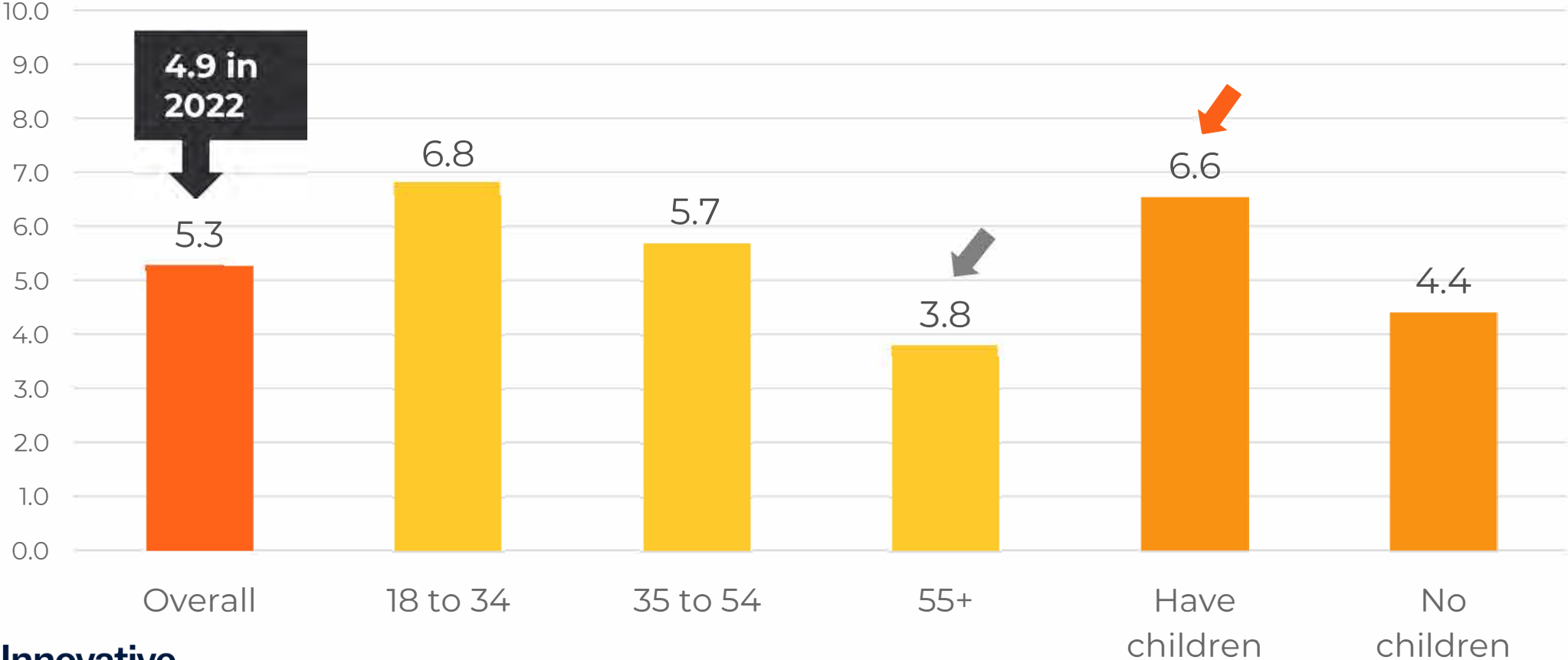
# Opinions on Wi-Fi Experience — by Age Group

Q31. Which one of the following best describes your Wi-Fi experience at home?



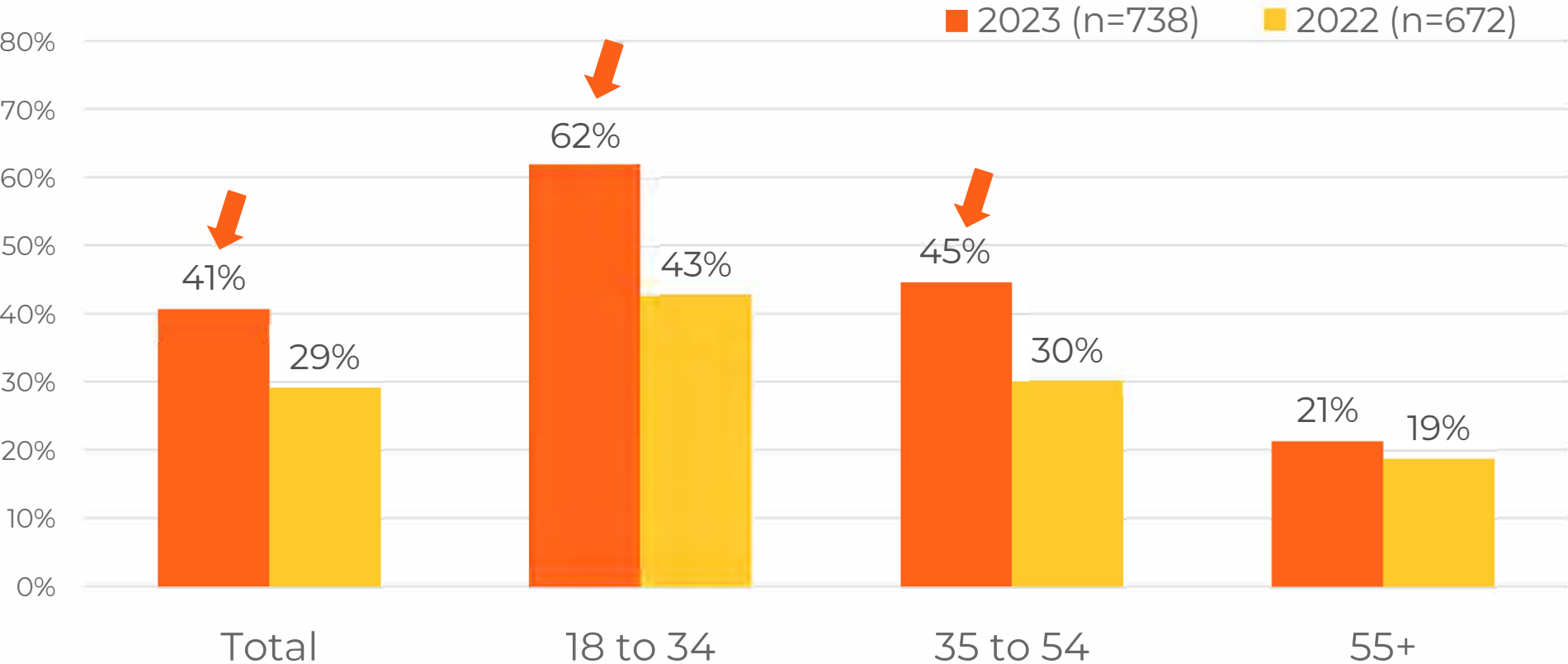
# Number of Devices Connected at the Same Time

Q32. 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)? (n=730)



# Use of Mobile App to Control Wi-Fi

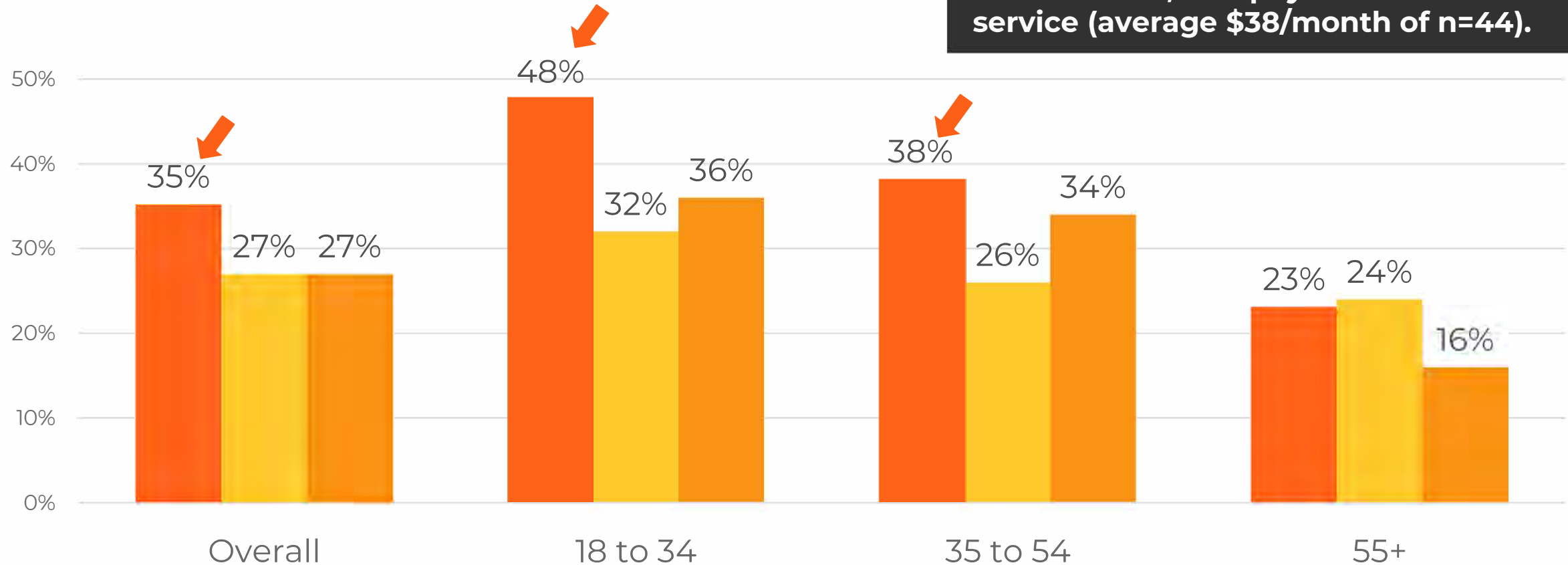
Q33. Are you or anyone in your household using a mobile app on your smartphone or tablet to control or manage your Wi-Fi connection or home network? *Percentage represents those answering "Yes"*



# Subscribe to Managed Wi-Fi Service?

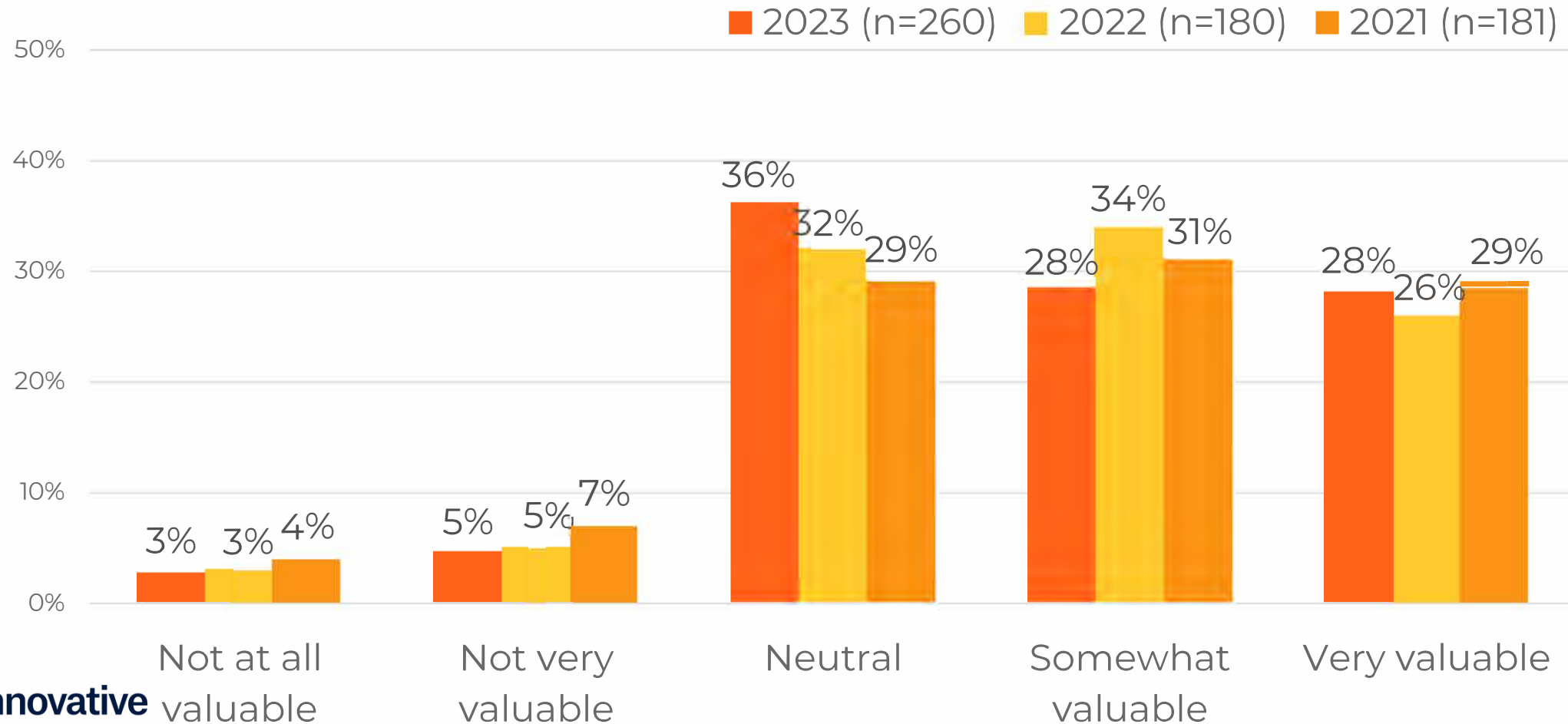
Q34A. Do you currently subscribe to a managed home Wi-Fi service?  
Percentage represents those answering "Yes"

**Of those who subscribe to a Managed Wi-Fi service, 23% pay extra for this service (average \$38/month of n=44).**



# Value of Managed Wi-Fi

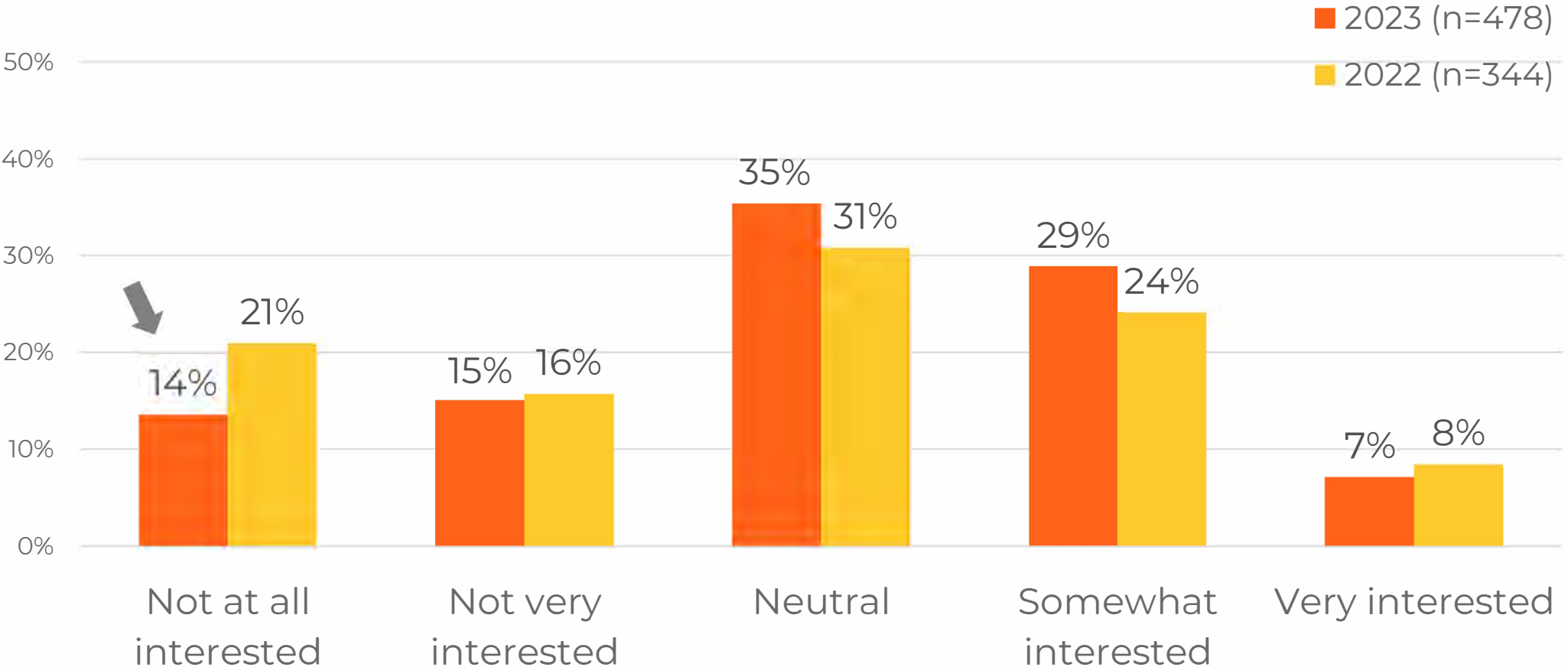
Q35. How would you describe the value of this service in improving the quality of your internet?





# Interest in Managed Wi-Fi

Q36. How interested would you be in a managed Wi-Fi service that provides unlimited technical support whenever you need to troubleshoot your devices, set up new devices and manage your Wi-Fi router? (n=478)



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## **Work From Home**

**True enterprise software that enables connectivity  
across Billing, Operations, Video, and Voice services.**

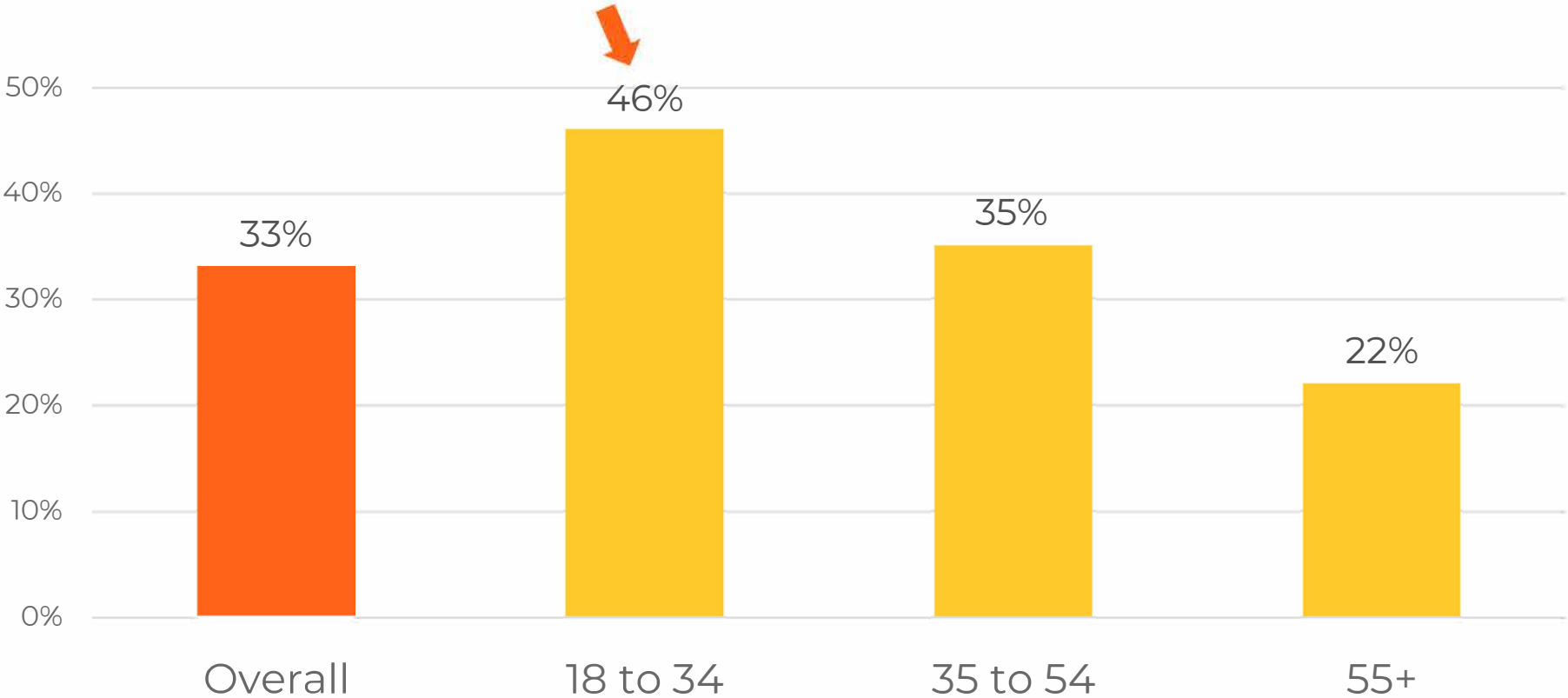


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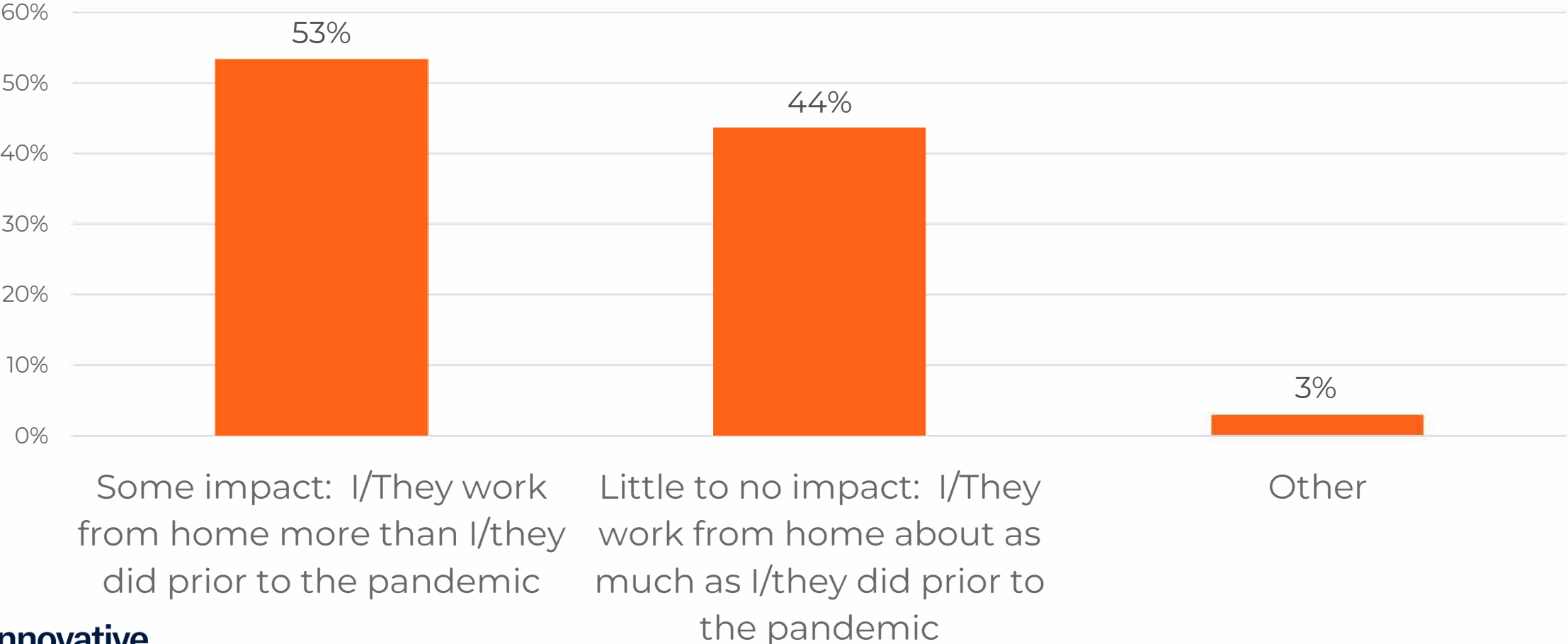
# Household Member Works Mostly from Home

Q37A. Do you or does someone in your household work from home, either full time or some of the time? (n=821) *Percentage represents those answering "Yes"*



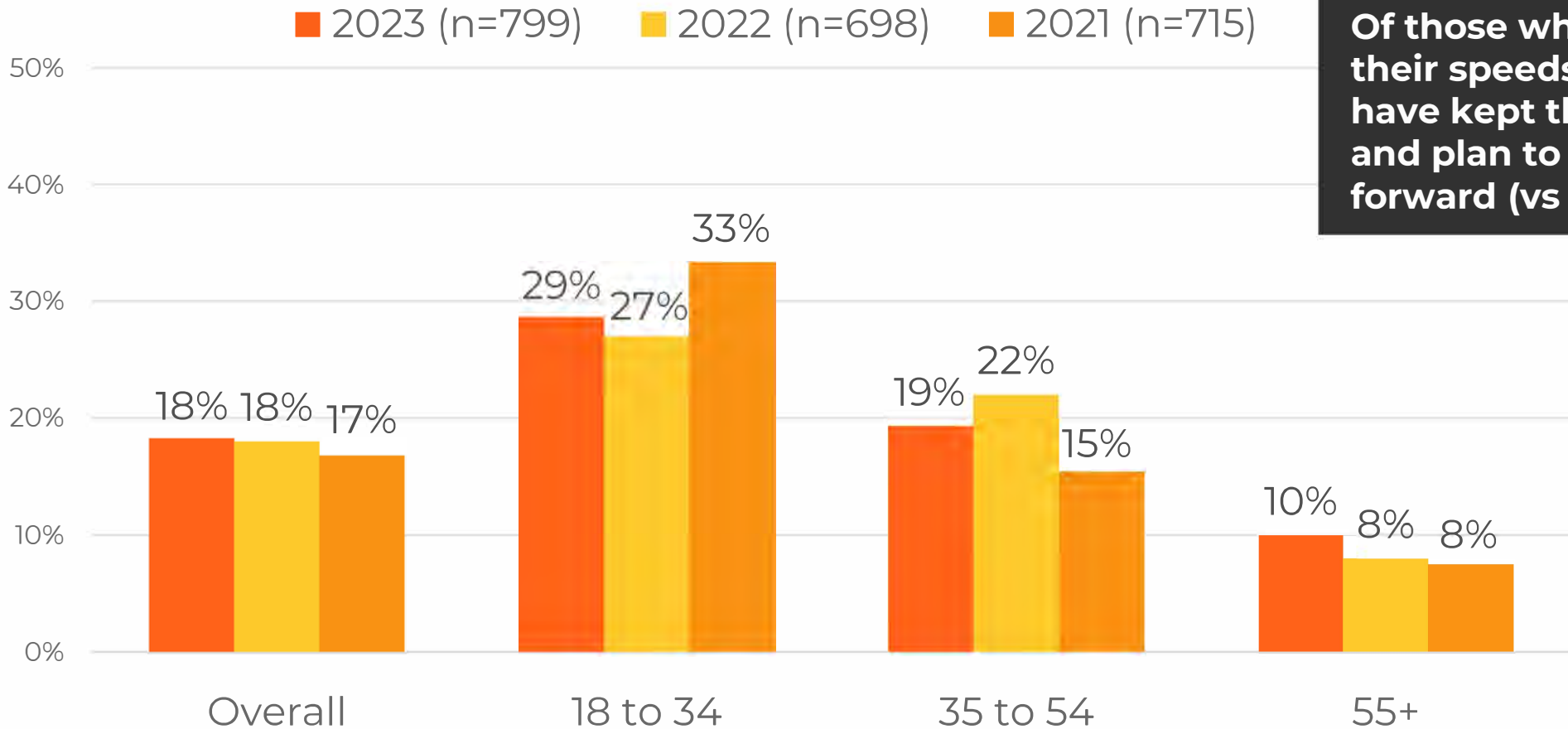
# Impact of Pandemic on Working from Home

Q37B. Which best describes the impact of the pandemic on how much you/they work from home? (n=270)



# Did Rural Customers Increase their Speeds?

Q38A. Since the time the pandemic began, has your household paid extra to increase/upgrade your internet speed? (n=799) *Percentage represents those answering "Yes"*



**Of those who have increased their speeds, 86% say they have kept the speed increase and plan to keep it moving forward (vs 76% in 2022).**

# Key Findings — Video

- The percentage of streaming households in rural America **has not changed significantly** over the past year (63% vs 61% in 2022). (Q4)
- **Top drivers of high TV satisfaction** continue to be: *having the specific channels we want* (52%), and *having many channels to choose from* (51%). (Q5B)
- **The top reason for low TV satisfaction** continues to be *rates/prices* (80%). Those aged 35+ are significantly more likely than younger ages to complain about high rates/prices. (Q5C)
- **The ability to record TV programs has increased** in popularity (63% to 71%). (Q8A)
- Nearly three quarters (74%) said they **prefer having the ability to fast forward through commercials**, rather than watch advertising-supported programs that cost less (with no ability to fast forward through commercials). (Q8B)
- **Local programming has risen in importance** from a rating of 8.2 to 8.6. (Q9)

# Key Findings — Video

- **Average monthly spend** on TV has increased overall from \$113 to \$124. The increase is attributed more to the younger and older age groups than to those aged 35-54. (Q10)
- **Both monthly streaming spend and streaming as a percentage of all household TV watching** have remained statistically the same as one year ago, and across all age groups. (Q15/Q16)
- The percentage who **stream using mobile** devices has increased among those under age 35, from 77% to 85%. (Q17)

# Key Findings — Broadband

- Overall, 63% **bundle internet and TV**, with no significant difference by age group. The average monthly spend on their bundle is \$121, up from \$114. (Q20/Q22)
- **The average internet satisfaction** rating is significantly higher among those 55 and older (8.0 vs 7.5). (Q21A)
- **Top drivers of high internet satisfaction** continue to be: *Good/Consistent connection speed* (65%), and *fair price* (62%). (Q21B)
- The **top causes of low satisfaction** are again *poor or inconsistent connection speed* (52%, down from 62%), and *rates/prices too high* (50%). (Q21C)
- As in the 2022 study, nearly one-third of all respondents 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 pay is \$84**, down from \$91 a year ago. (Q26/Q27)
- Overall, 56% with managed Wi-Fi believe the service is somewhat or very valuable, down slightly (from 60%). (Q35)



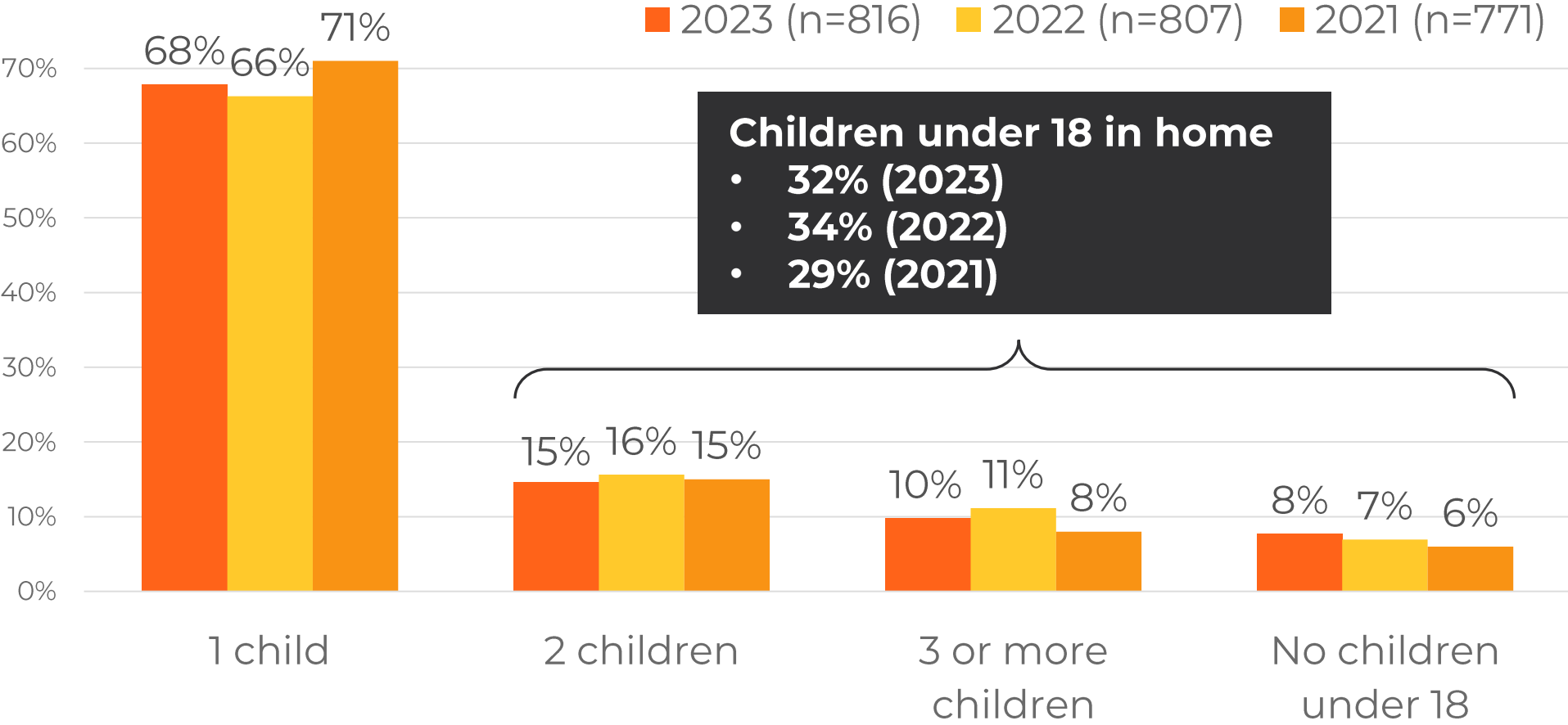
# Appendix



# Annual Household Income

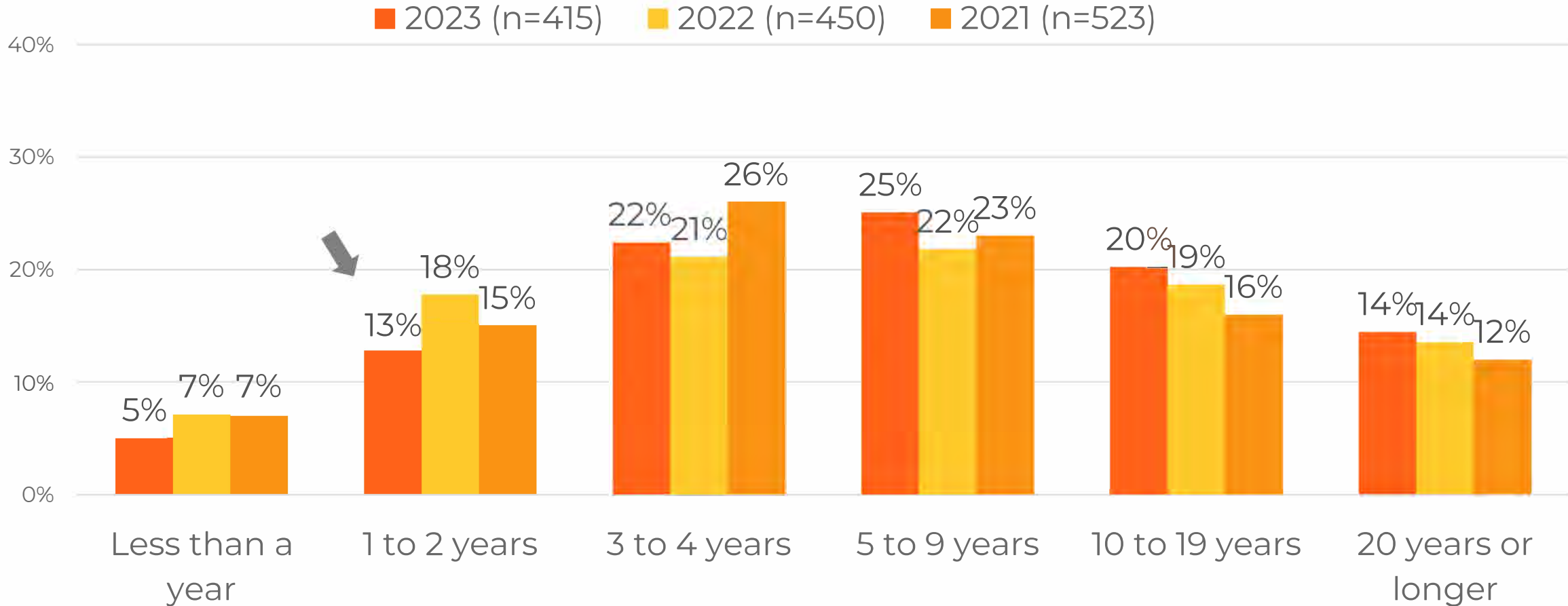


# Children Living in Home



# Tenure

Q6. How long have you had service from your current TV provider?



# Tenure by Age Group

Q6. How long have you had service from your current TV provider?

