



Rural Subscriber Study

Executive Report

2025

Introduction

The 10th Annual Rural Subscriber Study provides comprehensive data and analysis of rural consumer usage patterns that will help providers better understand customer needs and where rural U.S. markets are headed.

New for 2025

Key findings for this year's report focused on customer success, the impact of rural marketing and branding, and creating customer champions. Additional reporting covers competitive insights that reflect a subscriber's growing number of choices in the market. Respondents were given the opportunity to provide examples of exceptional service. They were also asked whether they had left reviews for their service providers and, if not, what would motivate them to do so. Included in the report are demographic profiles to help BSPs understand rural customers preferences.

About This Study

This research study was conducted by Pivot Group and sponsored by Innovative Systems. A total of 835 residential rural consumers from across the entire U.S. participated in this study, providing a statistically representative sample of U.S. rural internet and video subscribers.

Methodology

These findings are based on surveys collected in January 2025.

A leading research panel company provided a sample of 835 rural residents, providing a margin of error of +/- 3.5%.

The survey instruments were written by Pivot Group with input, collaboration, and additional questions provided by Innovative Systems.





Rural Broadband Usage

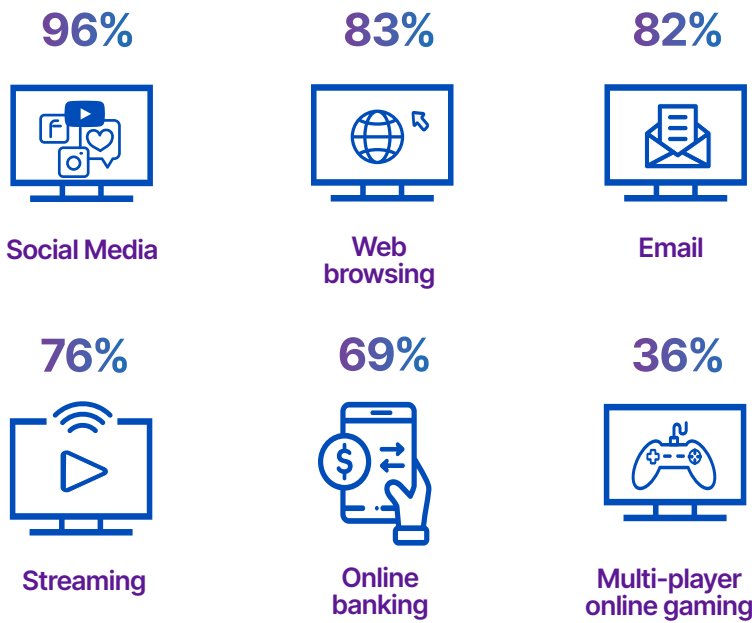
As Broadband expands throughout rural America, subscribers usage rises along with expectations of service.

How Rural Households Use Their Internet

Rural broadband subscribers need an Internet connection for almost every facet of their lives. 96% of respondents reported at least one member of their household using the Internet to browse social media daily, and this was consistently the highest ranked activity across age groups.

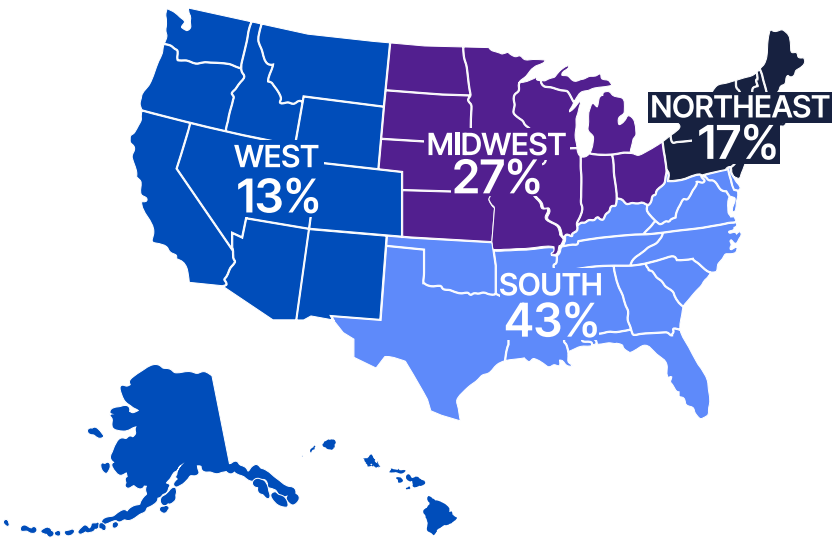
Internet Activities

Percentages of rural households that use the Internet for these activities



Regional Snapshot

Respondents to this survey are from Rural Households across the country

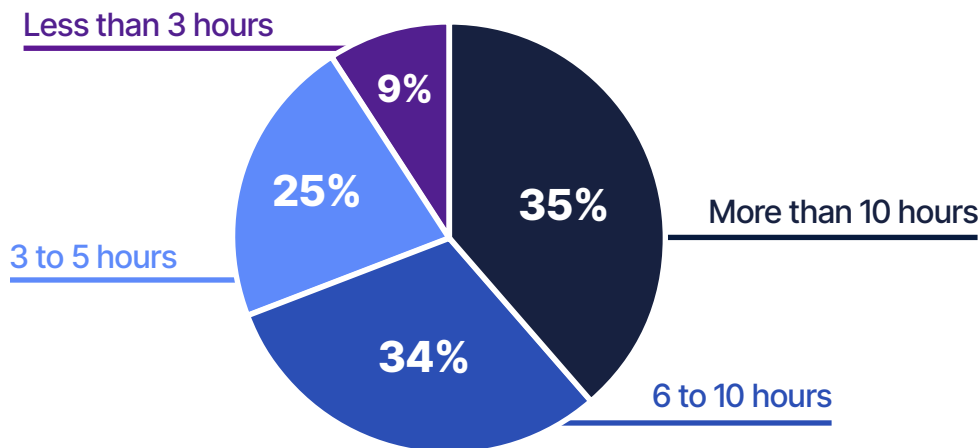


Internet Usage

35% of Rural Broadband subscribers **are online for more than 10 hours a day**, emphasizing the importance of an Internet connection.

Hours spent online

Estimated number of hours that respondents spend online daily.



On average, subscribers report having 5.9 devices connected at the same time.

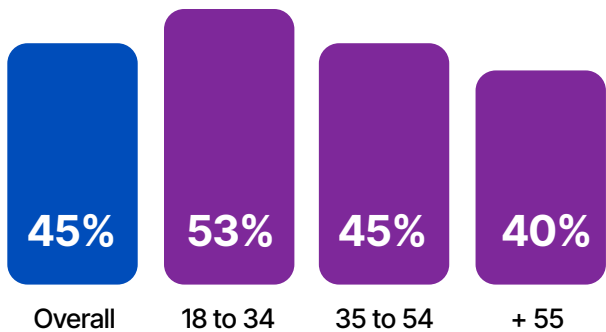
25% of total rural Broadband subscribers work from home. That number increases to 32% of 18-54 year olds.

Competition

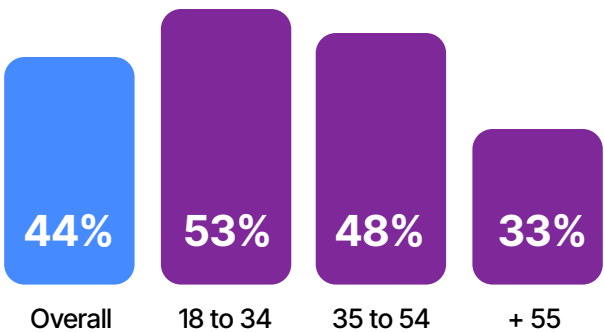
Competition is not new to Rural BSPs, but developing technology has brought in new players that subscribers are noticing. **Providing great customer service and communication** can help you differentiate in today's competitive market.

National providers are 12% more likely to have their subscribers leave them for their Cellular providers than local or regional providers.

Likelihood to Switch to current Cell Provider for Internet



Likelihood to Switch to Amazon Satellite* for Internet



*When the option is available

Broadband Fast Facts

Spending

Average monthly spend on internet service is **\$79, an increase from \$69 in 2024.**

Satisfaction with Internet Provider

Customers of locally based providers are significantly more satisfied than customers of national providers (7.9 vs 7.4 on a ten point scale).

Exceptional Service

Top examples of “exceptional” service include **connection reliability (14%), good tech support (13%), and good customer service (13%).**

Reviews

Respondents that subscribe to **additional services** from their Internet Provider are at least 3X as likely to **leave a review.**

Speed Awareness

37% of respondents **do not know their Internet speed tier.**

Speed Tier

26% of Rural Subscribers aged 35 to 54 **subscribe to gig speed or faster.** They are more likely than 18-34 year olds (19%) or 55+ (13%).

Provider Switching

20% of Rural subscribers said they have switched Internet providers in the past two years. The most common reasons for switching are for **faster speed (48%), followed by a lower price point (45%).**

Competition

Those that **subscribe to a local BSP are 10%-12% less** likely to switch to Internet service from Amazon Satellite Internet or their Cell provider than those that subscribe to a national BSP.



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Rural Video Usage

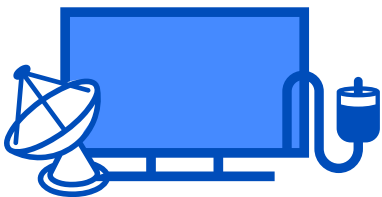
Video continues to be a significant source of entertainment for rural Americans. Customer satisfaction with video services has remained stable at 7.5 on a scale of one to ten over the past two years.

Live TV customers prioritize fair pricing, tailored channels, and unrestricted access to a diverse range of viewing options.

How Rural Consumers Receive Live TV

Rural Americans continue to prefer receiving television from local providers, which include both large cable companies in their markets and independently owned local companies.

47%



47% receive their live TV from a **locally-owned, regional or national cable company**

34%



34% receive live TV from **Internet companies** like YouTube TV, Hulu+ Live TV, and DIRECTV Stream

16%



16% receive live TV from **antenna only**

13%



Out of 835 respondents, only 13% indicated that they **do not receive any live television**

Video & Satisfaction

The vast majority of rural Americans still subscribe to some type of live TV service.

Consumers that **subscribe to internet only, and no additional services**, rate their **satisfaction as a 6.9 out of 10.**

Consumers that **subscribe to TV** from the BSP have a higher **satisfaction rate of 7.6 out of 10**

34%

of rural subscribers **have over the top live TV**

17%

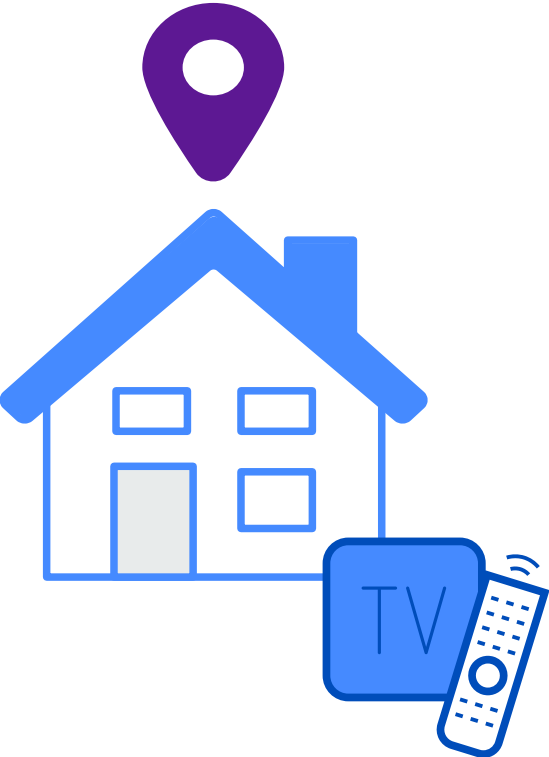
of rural consumers are very likely to **switch to streaming in the next 12 months**



Rural Video Consumer Fast Facts

As video delivery methods evolve from Cable to IPTV to streaming, rural consumers are primarily interested in a convenient way to watch TV.

Local programming	Local programming decreased slightly in importance with rural consumers rating it 7.7 on a 1 to 10 scale , down from 8.1 in 2024.
Streaming	The overall cost to subscribers for streaming services has increased by 20% over the past three years .
ARPU Alert	Americans aged 55 and older spend on average \$177 per month on their TV and Internet bundle.
Netflix	Netflix continues to be the most popular streaming service , but Amazon Prime is now a very close second.
Streaming Device Preferences	Smart TVs, Smartphones, and Rokus are the most popular devices that rural Americans use to watch video.
Live TV Costs	On average, consumers in rural markets spend \$74 per month on live TV .
Live TV	59% of the happiest live TV customers feel they are paying a fair price for their service .





Providing Value

Price and speed remain top concerns for rural Broadband subscribers, but the 2025 study shows that providing additional value and services increases customer satisfaction.

Speed and Price Insights

Many respondents were unaware of their speed tier, but they would be willing to pay more for a faster speed. A trial for a faster package could increase your ARPU and your customer satisfaction. Marketing on speed alone without customer education can lead to missed opportunities.

37%

of subscribers
don't know their
current speed



28%

say they would be
willing to pay more
for a faster speed



52%

would be interested
in a free trial of a
faster Internet tier



Price Willingness

Rural subscribers are willing to **spend more on faster Internet**, as compared to 2024.

The average household **spend for stand alone internet** in 2025:

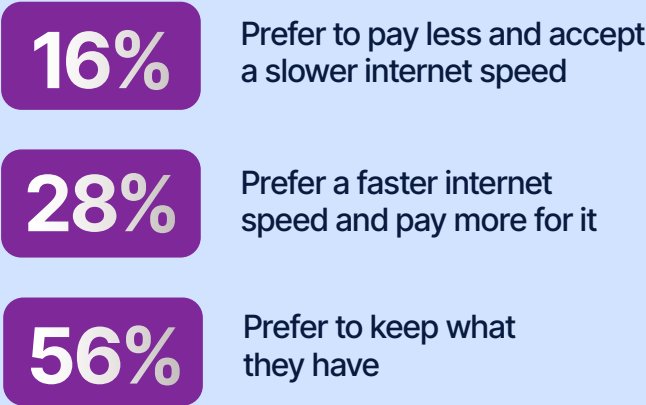
\$79 per month



What are your subscribers willing to spend for faster Internet?

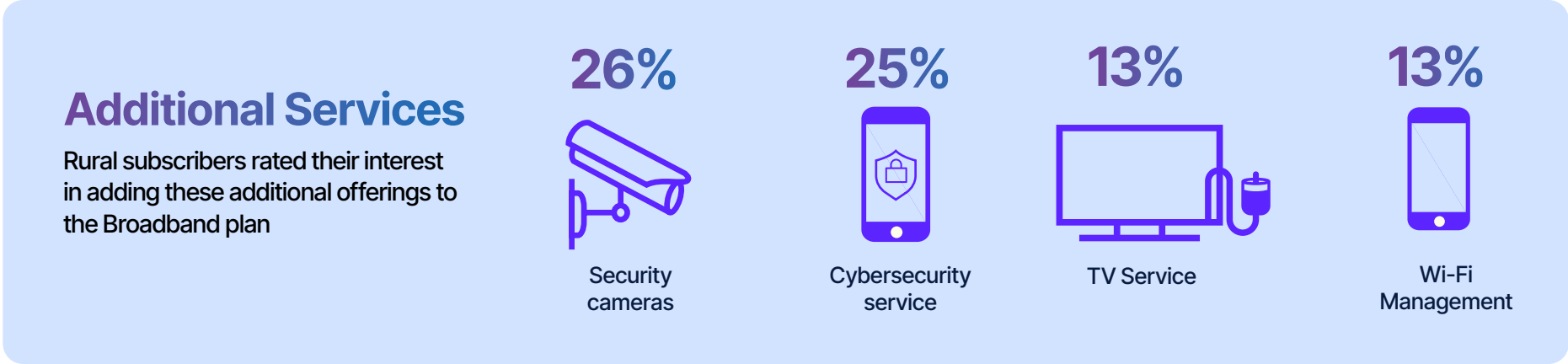


Preference for Faster Speed vs Lower Price



More Than Internet

Increase your ARPU and Customer Satisfaction when you offer additional services. Respondents that subscribe to additional services from their Internet providers report higher satisfaction. BSPs that offer additional services increase customer touchpoints and have more opportunities to delight their subscribers.



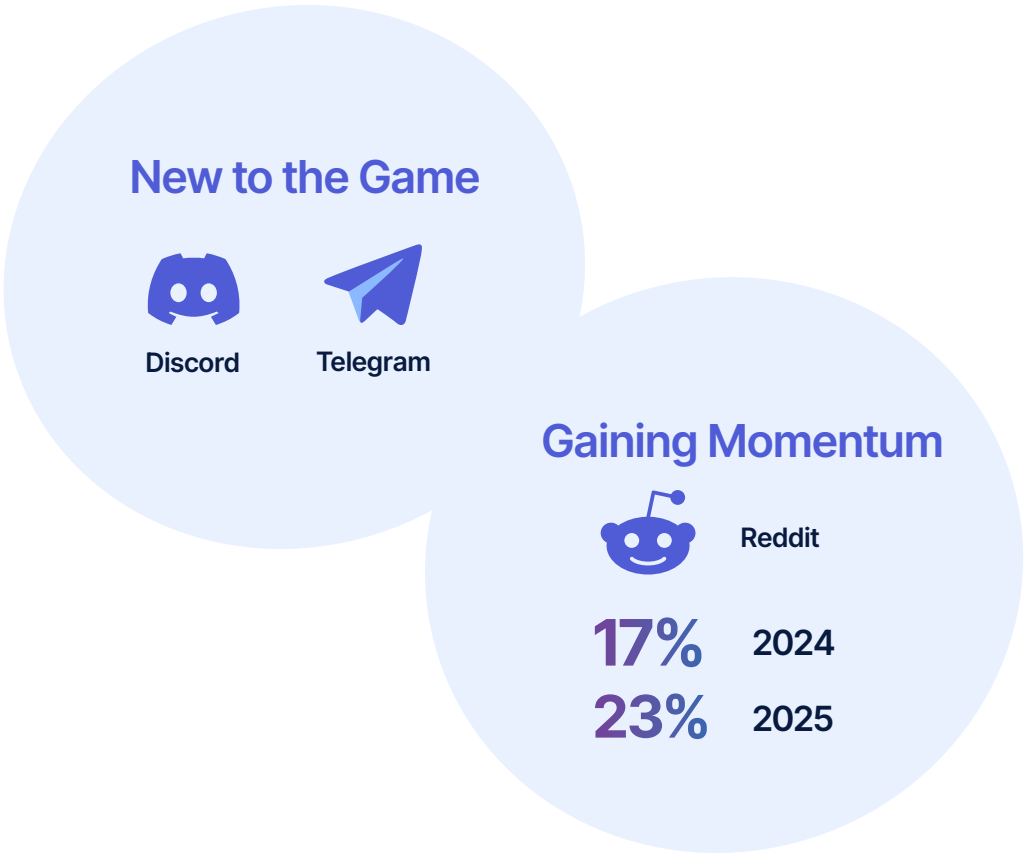


Marketing & Subscriber Acquisition

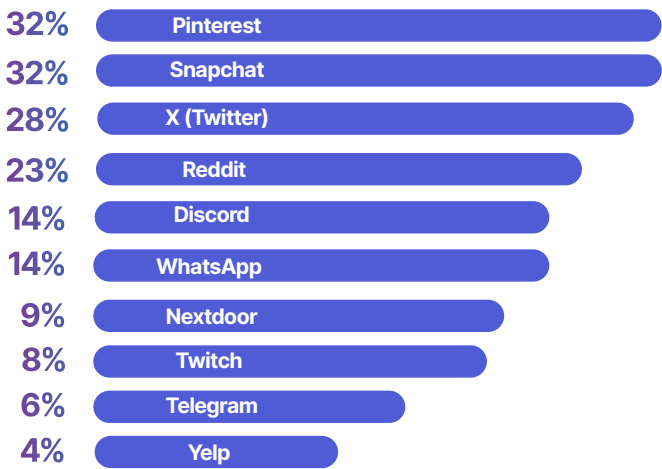
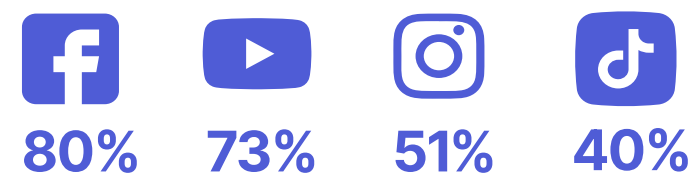
Rural broadband consumers continue to cite social media as a top Internet habit. This report takes a deeper dive into their preferences. This year, we examine marketing channel awareness and factors behind customer advocacy.

Social Media Habits & Trends

Rural subscribers rank Facebook as the most popular social media platform.

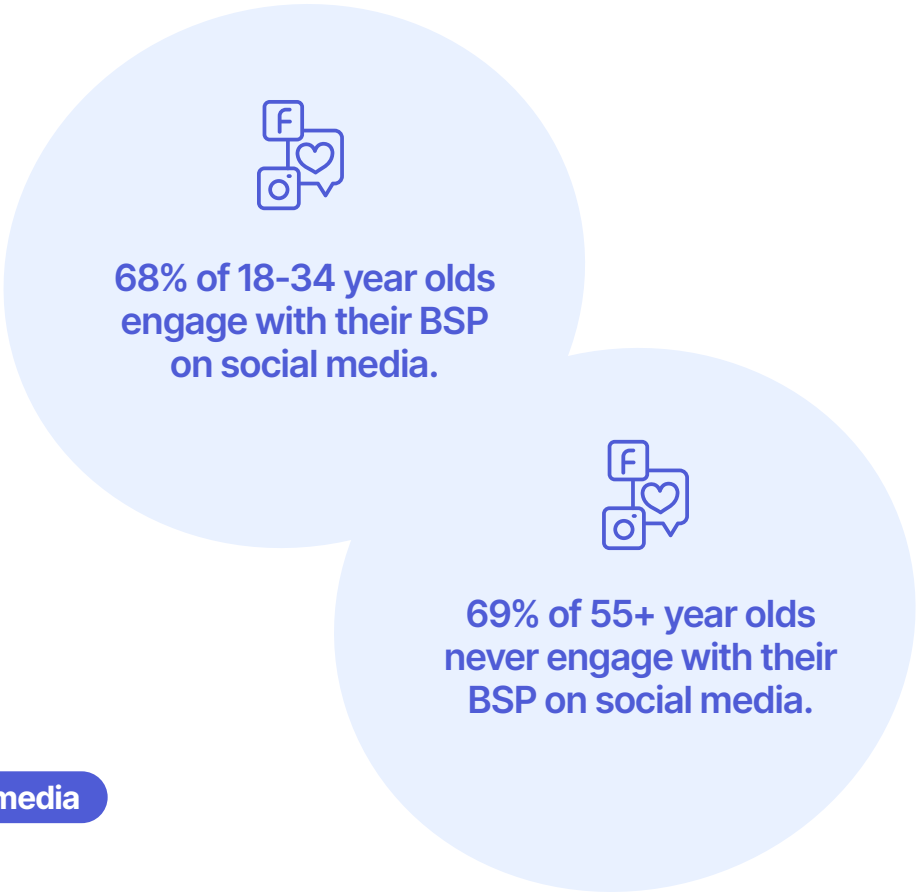
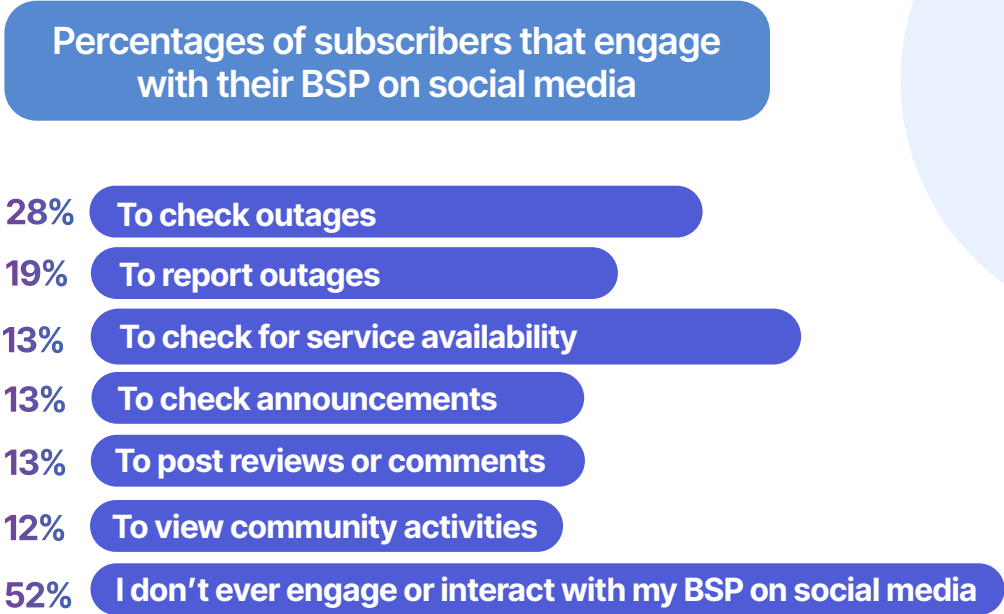


Percentage of subscribers that regularly visit these platforms:



Social Media Interaction with BSPs

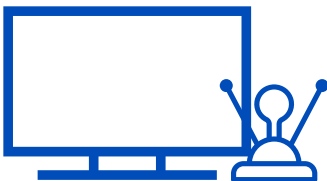
Rural subscribers regularly interact with their BSP on social media to check for and report on outages.



Marketing Channel Awareness

Survey respondents were asked if they recalled the last 6 months of marketing messaging from their BSP across a variety of channels.

Local Broadcast TV



28%

Email



24%

Social Media



22%

Traditional Mail



13%

Local Perspective

Marketing awareness from those with a local or regional BSP

Email: 23%

Local broadcast TV: 17%

Social media: 16%

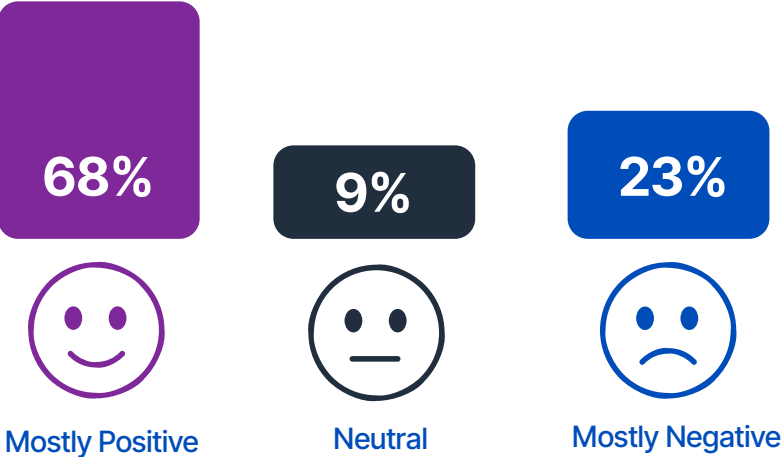
Traditional mail: 10%

Logo on vehicles: 12%

Customer Advocates

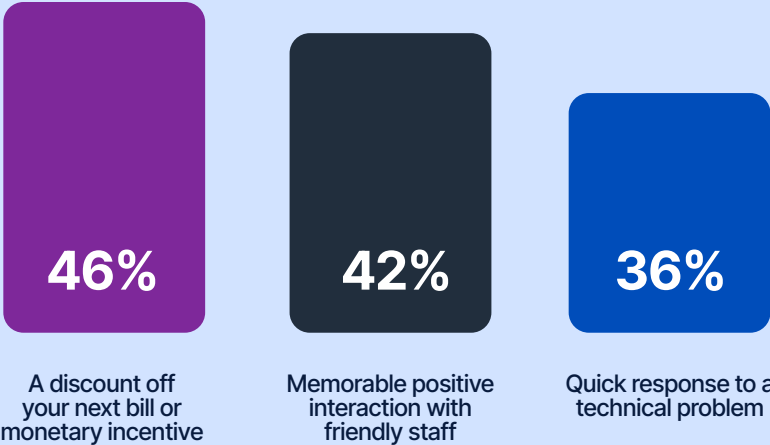
Just 23% of respondents have left a review about their Internet provider. Rural subscribers weighed in on how their BSP might convince them to leave a positive review in the future.

Tone of review



76% of rural subscribers ages 18-34 have left a positive review

What Would Prompt a Positive Review?



Why Subscribers Are Not Leaving Reviews

16% of subscribers do not know where to leave a review, or cannot leave a review easily. If providers make it simple and clear for consumers, their number of reviews can increase significantly.

32% have no reason to

12% notify their provider directly

10% don't know where to

6% say that there is no easy way to leave a review



Just **13% of Negative reviewers** said they were contacted by their provider to discuss or offer a remedy or resolution.

Give customers an **easy way to leave reviews** after installations and trouble ticket resolutions:

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



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



Customer Experience

Price and speed are top satisfaction drivers, but subscribers reported that customer experience also contributes to satisfaction.

What Drives High Satisfaction with Internet Service?

Rural consumers' average satisfaction with their Internet service is 7.5. Satisfaction factors remain consistent with previous years.

Top drivers of satisfaction

68% Good/Consistent connection speed

61% Fair price

50% Good customer service

39% Good technical support

33% Ability to bundle internet with other services

24% Local company



Subscriber Feedback

We asked survey respondents what their current internet provider has done to give them exceptional service:



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

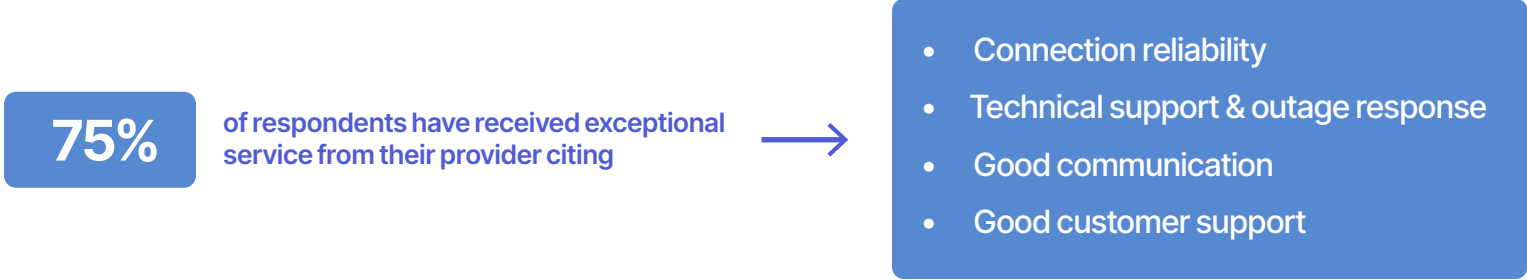


"Constantly make sure to update our router for us and make sure we get our internet as fast as possible for where we live."



"They are proactive, answer any questions, and have consistent pricing."

Exceptional Experience



What has your current Internet provider done to give you exceptional service?



What's Driving Low Satisfaction with Internet Service?

For dissatisfied customers, speed and price remain the top pain points. There is an opportunity for BSPs to improve the rural Broadband experience through great customer service and technical support, without adjusting on price.

Top drivers of low satisfaction

- 54% Rates/Price/Fees too high
- 48% Poor/Inconsistent connection speed
- 20% Poor customer service
- 14% Poor technical support
- 10% Don't have the ability to bundle services



Subscriber Feedback

We asked survey respondents what their current Internet provider has done to give them exceptional service. Here are some responses from those with low satisfaction:

“

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

“

“Nothing. They always raise the price.”

“

“It works good when there is a connection.”

Customers Preferred Method For Contacting Their BSP

Respondents ranked their preferences for using various methods of contacting their Internet provider. Across all demographics, a phone call was ranked as the top choice of communication method.

Phone Call



44%

Email



18%

Text message



16%

Live Chat on their website




13%

Website link or Mobile App



10%



Demographic Profiles by Age

This study surveyed respondents in the 18-34, 35-54, and 55+ age groups. In this section, you will find a profile of each group with insights on how to market, sell and serve them.

18-34 Year Olds

These are your tech evangelists that are willing to spend more, take additional services, and leave more reviews.

- More likely to **leave a review**
- Also more likely to leave a postive review
- Willing to spend more than other age groups on streaming and Internet service
- **Want to bundle services**
- **Interested in security cameras**
- **Streaming** is the most popular Internet activity
- Market to this group on **Social Media platforms**
- **Managing account** on app is important



YouTube is the most popular social media platform for this group, with **83%** regularly using the site.

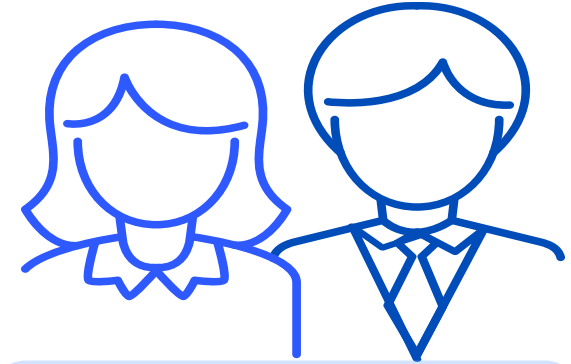
Facebook closely follows with **78%**.

Snapchat has a higher representation in this group with **58%** using the platform.

35-54 Year Olds

This group is concerned with reliability and consistency in their connection and customer service.

- This age group is most likely to take advantage of **telehealth visits**
- Mostly concerned with **consistent internet speed** and less with ability to bundle
- **Internet reliability** is very important
- More likely to leave a positive review after **monetary incentive or bill discount**
- **Streaming** is the top reason why they want internet reliability
- Interested in **security cameras**
- Most likely to subscribe to a **gig speed** or faster



35-54 Year olds are more active on **Facebook** than other age groups, with **84%** visiting the site.

55 and Older

The 55 and above segment prioritized consistent speed, and are unlikely to switch providers.

- Good/consistent internet speed is most important
- Dissatisfaction with internet is mainly from high prices
- Not likely to leave reviews
- Prefer to keep same service as long as it is working and reliable
- Over 50% do not know their internet speed
- Internet is mostly used for email, browsing, and online banking
- Not the right crowd to market on social media platforms
- Local programming is important for video



Respondents over 55 are less likely to **switch providers**, with only **17%** having recently switched.

They are also less interested in subscribing to Internet Service provided by **Amazon Satellites** (**33%** interested) or their **Cell provider** (**40%** interested).

About Innovative Systems

Innovative Systems is the leader of enterprise software for Broadband providers.

We help simplify operations, drive revenue growth, and provide a surprisingly great customer experience. Our platform includes eLation™, a market-leading Billing & Subscriber Management Platform (BSS/SMP), InnoStream™ Multi-Generation TV (MG-TV), a streaming video solution, and APMaX™, a hardware and software Voice over IP (VoIP) platform. Based in Mitchell, South Dakota, Innovative Systems is proud to support Telecom, Electric Co-op, Municipality and Utility Service Providers nationwide.

For more information, visit www.innovsys.com



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