



E-BOOK

Winning Over the Modern Viewer: A Playbook for Broadband and Pay TV Providers

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Executive summary

Internet service providers (ISPs) and pay TV providers are navigating a saturated, **highly competitive market** that includes evolving consumer preferences, rising content costs and **higher customer churn rates**. This landscape has spurred a shift in industry nomenclature, with many now identifying as broadband service providers (BSPs), **as this term better encompasses the strategy of delivering multiple services over a single, unified broadband network**. To remain relevant, these providers must find ways to leverage that infrastructure to deliver compelling, modern entertainment experiences that build lasting customer relationships and increase revenue.

Today's consumers demand more than just fast internet. They expect an entertainment experience that's flexible, seamless, personalized and accessible on every screen they use. Yet, for broadband and pay TV providers, delivering on these high expectations can be a significant challenge. Building a comprehensive video service from scratch is costly and complex, especially for those without existing TV infrastructure or content licensing agreements. To truly succeed and retain subscribers, providers need a solution that delivers both premium and free content, supports innovative monetization and fosters daily engagement — all without the burden of ground-up development.

The answer lies in white-labeled video platforms. These solutions empower providers to quickly launch a rich, branded entertainment experience, directly addressing consumer desires while sidestepping the formidable obstacles of in-house development.



Introduction: **Competing in the new** **entertainment economy**

Consumer expectations for entertainment have been redefined, and simultaneously, industry dynamics are relentlessly squeezing margins, eroding engagement and weakening brand loyalty.

Here are some of the biggest challenges BSPs face when competing in today's entertainment landscape:

Challenge: Erosion of loyalty and value justification

As broadband access proliferates, simply offering fast internet is no longer enough to differentiate. With nearly identical speed tiers across providers, customers often default to the lowest price or the most convenient option. This drives a race to the bottom on pricing, which is unsustainable. For example, the most popular home internet tier saw its real price [drop by 18%](#) between 2022 and 2023, with nominal prices falling nearly 10%, as reported by USTelecom. This trend highlights a fundamental shift: Consumers now want bundled value beyond just speed, and brand loyalty is fading fast. Simon-Kucher found that [over one-third of global broadband customers are interested in switching ISPs](#) at the end of their contract in search of a better offer.

Challenge: High churn in an overcrowded market

The North American ISP market is notably saturated, fueling increasingly high churn rates. New competitors, like fixed wireless providers such as T-Mobile and Verizon added [approximately 3.8 million U.S. subscribers in 2023](#), often at **the expense of fiber and cable ISPs**, according to S&P Global Market Intelligence. This contributed to cable ISPs experiencing [five consecutive quarters of subscriber losses](#) through Q4 2024, and some smaller providers reported annual losses over 6%.

Customer churn is no longer a minor issue; it's a systemic problem. Without differentiated services or content experiences, even minor disruptions or competing offers can trigger customers to switch providers.



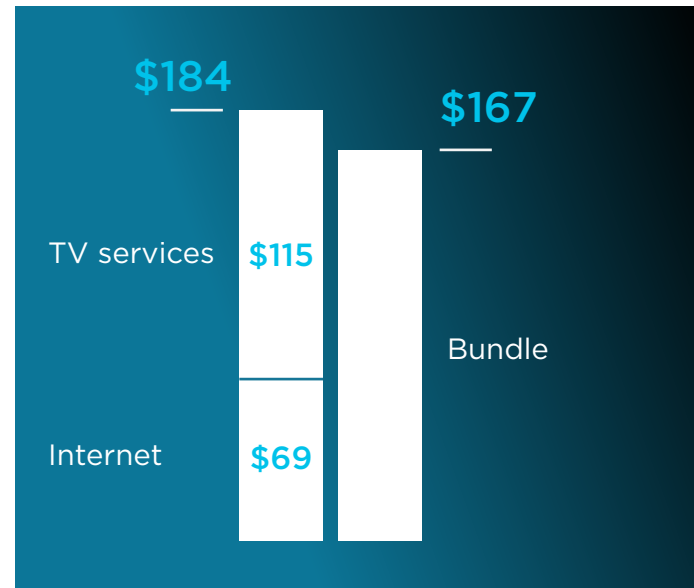
fixed wireless providers such as T-Mobile and Verizon added approximately 3.8 million U.S. subscribers in 2023

*Global Market Intelligence

Challenge: Limited customer touchpoints and growth potential

For many BSPs, particularly those focused solely on connectivity, customer interaction is limited to billing or support. Unlike traditional pay TV providers whose interfaces frequently appear on users' screens, broadband-only providers often recede into the background. This passive presence severely restricts opportunities to introduce services, build brand equity or drive upsells, significantly limiting average revenue per user (ARPU) growth.

Research from PwC confirms converged service models — where multiple services are bundled — demonstrably increase share of wallet, lower churn and improve lifetime value. According to an Innovative Systems' Annual Rural Broadband, Video and Social Media Report, customers spend an average of \$69 every month on internet and an average of \$115 each month on TV services. However, bundled customers spent about \$167 monthly, creating a significant ARPU increase for providers offering both. The more integrated value a provider offers, the more likely customers are to remain loyal and accept premium pricing.



Challenge: Maintaining visibility and brand presence

In an era dominated by highly branded streaming platforms like Netflix, Hulu and YouTube TV, BSPs risk becoming mere conduits for someone else's content. This loss of brand presence is critical, especially as major competitors increasingly leverage sophisticated content experiences to build stronger consumer relationships and differentiate themselves. Executives from major operators, in interviews with Fierce Telecom, have underscored that compelling entertainment experiences are central to defending their broadband base and reducing churn. This strategic pivot isn't limited to the largest players; smaller operators across North America are increasingly embracing modern content solutions to reintroduce curated experiences as a brand-forward service.

Solution: Strategic innovation without heavy investment

The pressure to innovate is immense, yet few BSPs possess the time, staff or capital for large-scale, in-house development. Fortunately, the industry is seeing a [clear shift toward lean innovation models](#), as highlighted by PwC's Global Entertainment & Media Outlook. This involves strategies like building popular streaming services, offering third-party content add-ons or partnering with turnkey white-label vendors.

These approaches allow BSPs to diversify revenue streams, create more valuable bundles and stay competitive. By collaborating on streaming bundles or adopting ready-to-deploy platforms, BSPs can evolve faster and more affordably.

Ultimately, BSPs need more than just connectivity to thrive. They require a comprehensive strategy to deliver a complete, differentiated, modern entertainment experience that builds loyalty, provides tangible value and keeps their brand visible in the daily lives of customers. The good news is they don't have to build it all from scratch to deliver significant value.



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PART ONE

The modern viewer

Today's TV viewers are more informed, broadband-driven and immersed in a multi-app, multi-device world than ever before. As viewing habits continue to evolve, expectations for seamless content access, intuitive usability and flexible options remain exceptionally high, particularly among broadband-only households. Meeting these demands requires a sophisticated, integrated entertainment solution.

On-demand is the new normal

Viewers now expect instant access to content, anytime and on any platform. With viewers using an average of 9.9 services for TV and entertainment, according to the [TiVo Q4 2024 Video Trends Report](#), content consumption is incredibly fragmented, not centralized. This has normalized an on-demand mindset: Viewers no longer wait for scheduled programming or tolerate limited availability. Convenience is non-negotiable. Providers who fail to offer complementary content experiences risk being overlooked, while those who integrate diverse, on-demand solutions stand to thrive.

Cross-device consistency and the demand for simplicity

Entertainment no longer stays in one room, and the days of clunky, fragmented user experiences are over. Viewers expect a streamlined, consistent experience across all devices, including consistent streaming performance, intuitive navigation, relevant recommendations and easy content access, no matter the source or screen. Viewers crave simplicity: one seamless place to browse, search and launch their content. Platforms that can't deliver this consistency risk not only immediate abandonment but also long-term loyalty erosion.

Frustrating discovery creates opportunity

Content discovery remains a persistent pain point for viewers. While 53% usually or always know what they want to watch, many leave their entertainment platforms in search of content. Thirty-two percent use companion apps like JustWatch or IMDb. This “toggle tax” presents a major opportunity for differentiation. Platforms offering intelligent, in-platform discovery, powered by robust metadata, user behavior and personalization, can reestablish trust and eliminate the need for external tools. For BSPs, this is a chance to deliver a smarter, branded experience that helps viewers find what they love, often before they even know they want it.

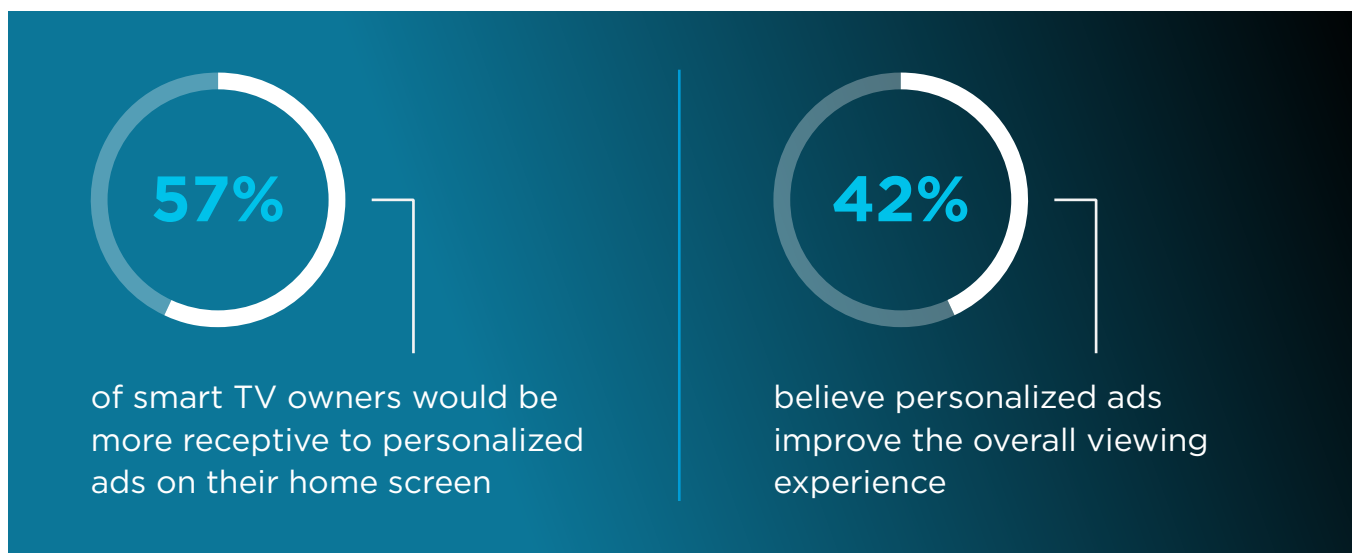


FAST and foundational revenue growth

Free ad-supported streaming television (FAST) is now a crucial part of the entertainment mix, especially for cost-conscious households. Seventy-four percent of all advertising-based video on demand (AVOD) and FAST users report watching FAST channels, with genre, binge and news channels leading demand. For many, these channels are directly replacing traditional cable. FAST integration is rapidly becoming a baseline expectation. BSPs that combine FAST with subscription content, local channels, live sports from all sources and on-demand libraries can effectively meet diverse customer needs and significantly expand their revenue potential.

Personalized, flexible experiences drive engagement

Viewers demand personalization and flexibility. For example, 60% consider local content important, yet foreign-made programs account for 8% of their viewing time. This desire for tailored experiences extends to advertising: 57% of smart TV owners would be more receptive to personalized ads on their home screen, and 42% believe personalized ads improve the overall viewing experience. When content and ad choices are personalized and flexible, it creates a more tailored, enjoyable experience that keeps audiences deeply engaged and loyal.





PART TWO

The blueprint to becoming an entertainment provider

When BSPs successfully evolve into true entertainment providers, they don't just add a new offering; they forge deeper customer loyalty, unlock entirely new monetization streams and significantly boost their brand's relevance in the household. For many BSPs, partnering with the right video solution provider offers the fastest and most cost-effective path to achieving these crucial goals.

Turnkey streaming platforms reduce time to market

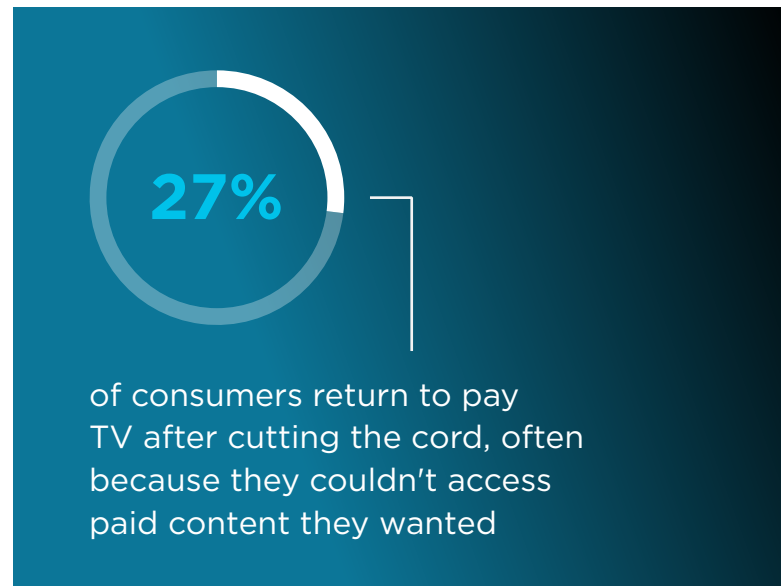
Standing up a video platform from scratch takes capital, diverse talent and long development cycles. For many BSPs without existing video infrastructure, it's simply not possible with their current resources.

Turnkey streaming platforms eliminate these barriers. With a platform that includes linear TV, on-demand content, OTT app access and smart discovery tools, BSPs get to market faster without spending critical resources. Working with an established partner can also help reduce ongoing operational burdens and eliminate the need to license content directly. BSPs can focus on growth and customer experience rather than technical upkeep.

Meeting the growing demand for value-added services

Bundled service offerings significantly improve customer retention and revenue. BSPs that pair connectivity with services like streaming video can see benefits such as [regaining pricing power](#) in ways that standalone internet can't achieve.

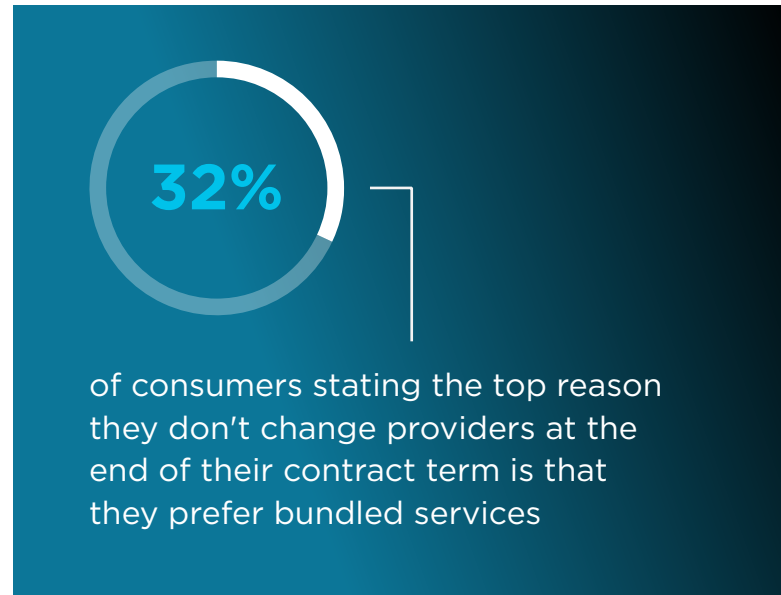
TiVo research found that 27% of consumers return to pay TV after cutting the cord, often because they couldn't access paid content they wanted. Bundling high-value entertainment services can be a powerful retention strategy and a way to stand out. BSPs have the potential to reduce churn, stay top of mind and become indispensable to consumers who value their entertainment experience.



New revenue streams with flexible models

Video solutions provide BSPs with flexible, scalable monetization strategies. These range from ad-supported content, such as AVOD and FAST, to premium subscription tiers, such as subscription video on demand (SVOD), premium over the top (OTT) bundles and hybrid models.

A BSP might offer all broadband subscribers a free FAST tier, with upsell options for premium OTT and SVOD bundles that include premium streaming apps, for example. Layered approaches create monetization opportunities at every point of the user journey without requiring the BSP to manage content licensing or delivery infrastructure themselves. Research from Simon-Kucher found that value-added services and [bundling can help increase ARPU](#). It can also improve retention, with 32% of consumers stating the [top reason they don't change providers](#) at the end of their contract term is that they prefer bundled services, reported Telecompetitor.



Strengthened brand experience for a stronger, more credible presence

By integrating video streaming services with broadband, you can evolve from a service provider into a trusted household brand. Video solutions allow BSPs to own the home screen, strengthen their brand the moment the TV is turned on and transition from a hidden utility to a trusted, daily presence.

A stronger brand experience is a direct line to customer engagement, upsells, content promotion and long-term loyalty. When you own the home screen, it fosters familiarity and trust, gradually reducing churn and bolstering your brand.

Cross-device stickiness and user engagement

Leading video platforms support multi-device viewing across TVs, tablets, phones and set-top boxes with consistent user experiences.

But true stickiness comes from more than just access. It comes from personalization. When content and personalized recommendations are in one place, daily engagement becomes effortless. If users can stop bouncing between apps and rely on a unified interface they enjoy, they will engage more often and see you as a valuable entertainment provider.

By adopting a modern video solution, BSPs can transform their role from commodity bandwidth to a curated experience.



When content and personalized recommendations are in one place, daily engagement becomes effortless.



PART THREE

Innovative entertainment starts with TiVo

TiVo has long been at the forefront of TV evolution, from developing the DVR to redefining content discovery. Today, TiVo continues to innovate with a fully integrated, white-labeled streaming video solution that meets the needs of viewers and BSPs alike.

TiVo Broadband™ TV is built to solve key market challenges, helping BSPs reduce churn, grow revenue and reengage subscribers through a flexible, low-lift video platform.

A legacy brand with a ready-to-go streaming platform

TiVo brings decades of brand trust, engineering experience and media expertise to the table when designing its video solutions. TiVo Broadband TV is a provider-ready video platform with the elements viewers want: live TV, on-demand content, FAST and AVOD channels, OTT integrations, search and recommendations, and multi-device support. It's wrapped in a branded experience that belongs to the BSP.

With open, adaptable architecture and a quick go-to-market model, TiVo Broadband TV makes it possible to compete in the entertainment space without building or managing a platform in-house.

Curated live and on-demand content

TiVo Broadband TV includes:

- 50+ lifestyle and entertainment-focused channels*
- TiVo+, a free, robust content network offering over 300 channels and 100,000+ free movies and TV shows, local live TV
- Integrations with leading OTT apps like Netflix, Disney+, Hulu and more

TiVo Broadband TV also provides network DVR with the ability to record, start over and catch up, along with new features like **Sports Hub and MultiView, which lets viewers watch four channels at the same time.**

With both breadth and depth, TiVo lets viewers access everything from breaking news and local sports to binge-worthy shows, classic movies and niche interests. It's the kind of content mix that keeps users watching and video providers top of mind.

*Channels only available for operators participating under NCTC agreements.

Monetization via advertising

While reducing churn and attracting new customers are key monetization strategies, there's also significant advertising revenue potential to tap into. TiVo's built-in FAST channels and AVOD offerings make monetization simple and scalable. With no additional licensing complexity, BSPs can deliver high-quality, ad-supported content that adds value for users and creates new revenue streams. TiVo+ simplifies the delivery of curated, monetizable advertising revenue opportunities built directly into the user experience. Home Page Hero Ads offer high-visibility ad placements on the TiVo platform, creating premium advertising venues for brands and revenue growth opportunities for BSPs.

The result: increased customer satisfaction and advertising dollars, all without the need for costly content deals or production budgets.

Branding flexibility through a white-label experience

TiVo's video platform is white labeled, giving BSPs full control over the user interface and brand experience. From the welcome screen to the recommendation engine, every aspect can be branded to reflect the provider's identity. That means you don't just offer great content; you also own the experience with visibility that builds long-term engagement and trust.



TiVo+ simplifies the delivery of curated, monetizable advertising revenue opportunities built directly into the user experience

UX designed for broadband devices

TiVo Broadband TV is designed specifically for broadband environments. Whether users are watching on a smart TV, mobile device, tablet or set-top box, the experience is optimized for seamless navigation, consistent branding and high-speed performance. The intuitive UI makes content discovery easy, while smart recommendations help keep users engaged across screens.

Analytics, recommendations and voice search

TiVo's advanced metadata and machine learning capabilities power an integrated content discovery engine. Viewers get personalized recommendations that evolve with their preferences and learn from behaviors across channels. With this data, BSPs can see analytics that surface viewing trends, engagement metrics and monetization opportunities. Features like voice search, deep linking and dynamic content curation make sure users' interactions are intelligent and personalized.

Build on TiVo's brand legacy

TiVo is one of the most recognizable brands in the industry, and that legacy matters. With consumers increasingly overwhelmed by fragmented streaming ecosystems, TiVo's name signals trust, simplicity and innovation. For BSPs, that legacy adds instant credibility. Partnering with TiVo allows you to offer not just a product, but an award-winning solution. To subscribers, it says, "This is a trusted experience built on decades of getting the entertainment experience right."



This is a trusted experience built on decades of getting the entertainment experience right.



A smarter path to the future of video

Consumers have embraced new ways of consuming content, and they want to get the most value from their entertainment providers. The desire for personalized, high-quality entertainment has never been stronger. BSPs who find a way to meet those needs with integrated video solutions will solve essential challenges while building loyalty, revenue and brand relevance.

TiVo Broadband TV delivers everything viewers want and BSPs need to thrive:

- A fully integrated platform
- Turnkey deployment
- Multi-device access
- Monetization across AVOD, SVOD, FAST and ads from the home screen
- Personalized content discovery
- Provider branding and control
- A trusted partner with a legacy of service and innovation

It's a video solution built with BSPs in mind — without the hassle of developing it in-house. Want to learn more about how [TiVo Broadband TV](#) can help you transform into a broadband-powered entertainment destination? Reach out today for a personalized demonstration and discover how our innovative solutions can benefit your business.

Buckeye Broadband's partnership with TiVo Broadband, for example, is a successful case study. Geoff Shook, president of Buckeye Broadband, highlighted the strategic importance of providing customers with additional programming that is integrated directly with broadband services, a capability that traditional wireline competitors typically lack.

"In an age where the traditional video tier costs continue to skyrocket, which results in higher and higher customer bills, we determined that we had to adapt and review alternative video consumption opportunities," said Shook. "With the continued meteoric growth in OTT utilization, it was obvious to our company that we needed our own alternative programming avenue, one we could attach to our broadband service specifically. TiVo+ fits that need. We can now offer our customers additional video programming as a value add just for being a valued, HSD customer. This is something our wireline competitors can't do."



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business.tivo.com/products-solutions/iptv-solutions



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