

A person wearing a straw hat and a light-colored shirt is holding two tablets and a laptop. The background is a bright, cloudy sky. The person's face is obscured by the tablet they are holding. The tablet in their right hand shows a lock screen with the text "Slide to unlock". The tablet in their left hand shows a lock screen with the time "12:42" and the date "Wednesday 16 July". The laptop in the bottom right corner shows a desktop environment with a landscape wallpaper and a dock of application icons. The text "MacBook Pro" is visible at the bottom of the laptop screen.

# *Marketing to the Heartland 2017*

PART 2: MEDIA CONSUMPTION TRENDS

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# Marketing to the Heartland

## Part 2: Media Consumption Trends

In the previous installment of our “Marketing to the Heartland” research series, we uncovered different values that consumers living in the Heartland\* find important compared to their Coastal counterparts. Heartland Americans are more likely to value family, faith, and be more community oriented. They are also more likely to find out about new brands and products through social networks as well as word of mouth.

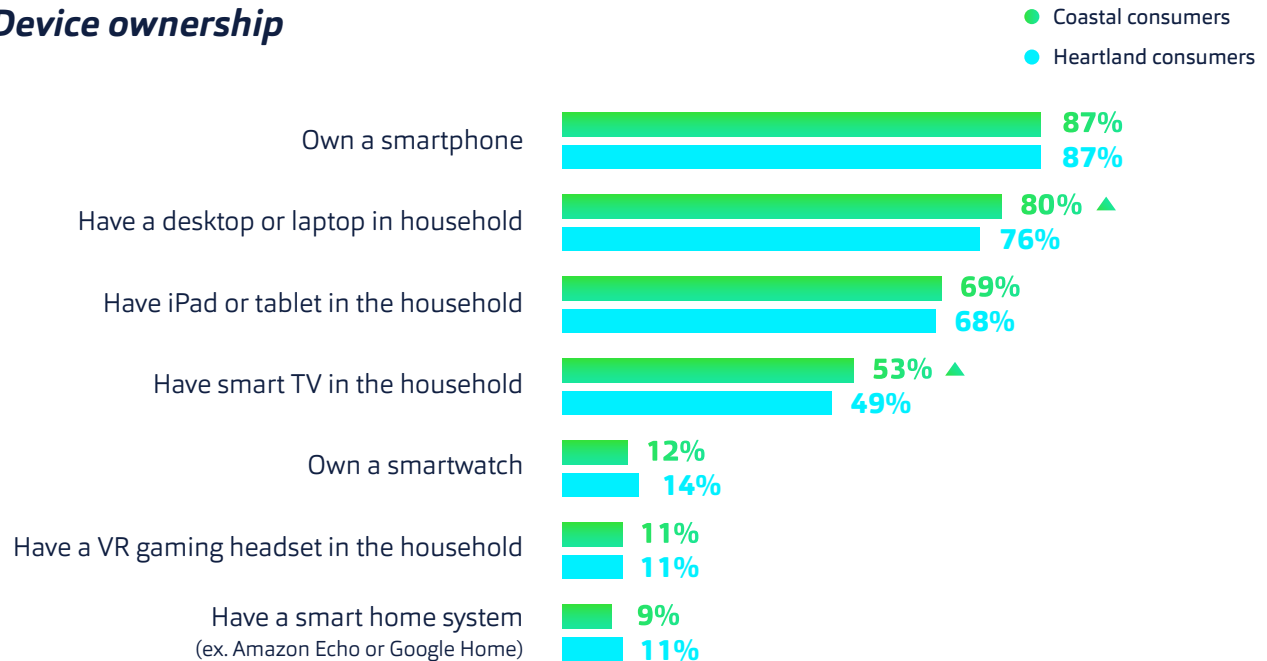
In this report, we dive deeper into device ownership and media consumption habits and how they vary based on region. What we found is that while there are some differences between consumers in the Heartland and their Coastal counterparts, there are more profound differences in media consumption trends between consumers in urban, suburban and rural settings. These insights can provide valuable direction for marketers and media and entertainment brands as they engage with different audiences, segmenting them by DMA (Designated Market Area) regions.

\*See methodology for definition.

# 1 Device Ownership

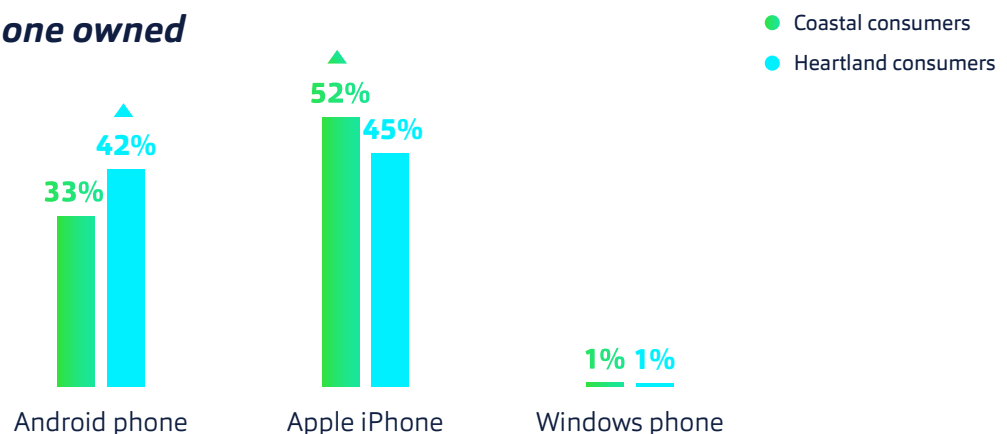
It has become increasingly important for marketers and brands to ensure that their advertising buys include mobile and to optimize content for mobile consumption. Smartphones are now the most prevalent devices, owned by nearly 9 in 10 Americans. There are currently more US consumers who own a smartphone than a laptop or desktop computer. This is especially true for Americans living in the Heartland, who are less likely to have a personal computer in their household. They are also less likely to have a smart TV than those residing in Coastal states.

## Device ownership



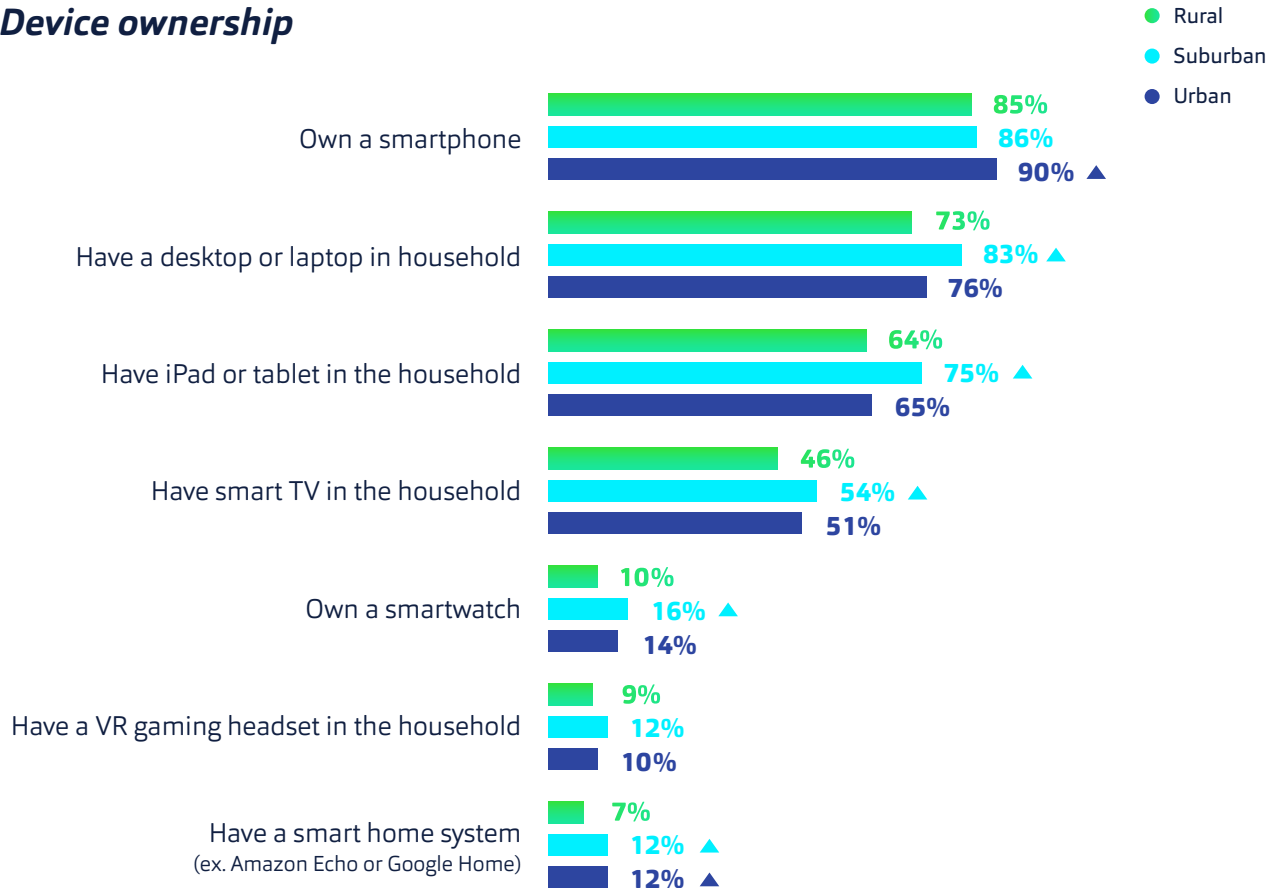
Smartphone preferences also vary significantly across regions. Consumers living in the Heartland are more likely to own an Android phone and Coastal residents share a fondness for the iPhone. This could be partially due to the fact that Coastal consumers, on average, have higher incomes.

## Type of smartphone owned



While urban dwellers are the most likely segment to own a smartphone, Americans living in the suburbs tend to own more of all other devices and gadgets, including iPads and tablets, computers, smartwatches and smart home systems. Rural residents don't own as many technological gadgets as the rest of the population. The highest earning households are concentrated in suburban areas, and more diverse device ownership is correlated with income.

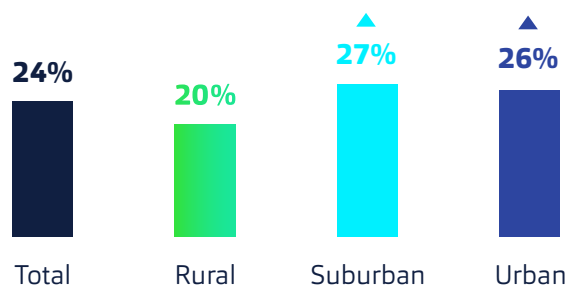
## Device ownership



Nearly 1 in 4 US consumers can be described as early tech adopters – meaning they own at least one of the following: a smartwatch, a smart home, or a VR gaming headset. Early tech adopters are concentrated in urban and suburban areas.

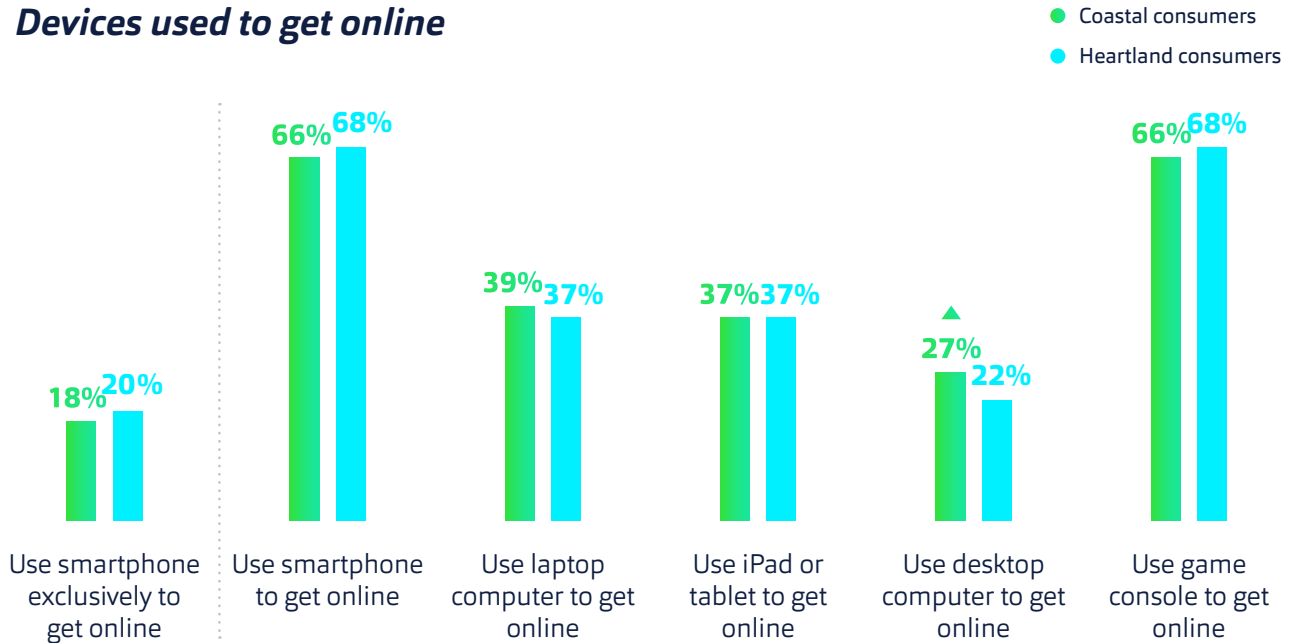
## Early Tech Adopters

Have a smart home, a VR gaming headset or own a smartwatch

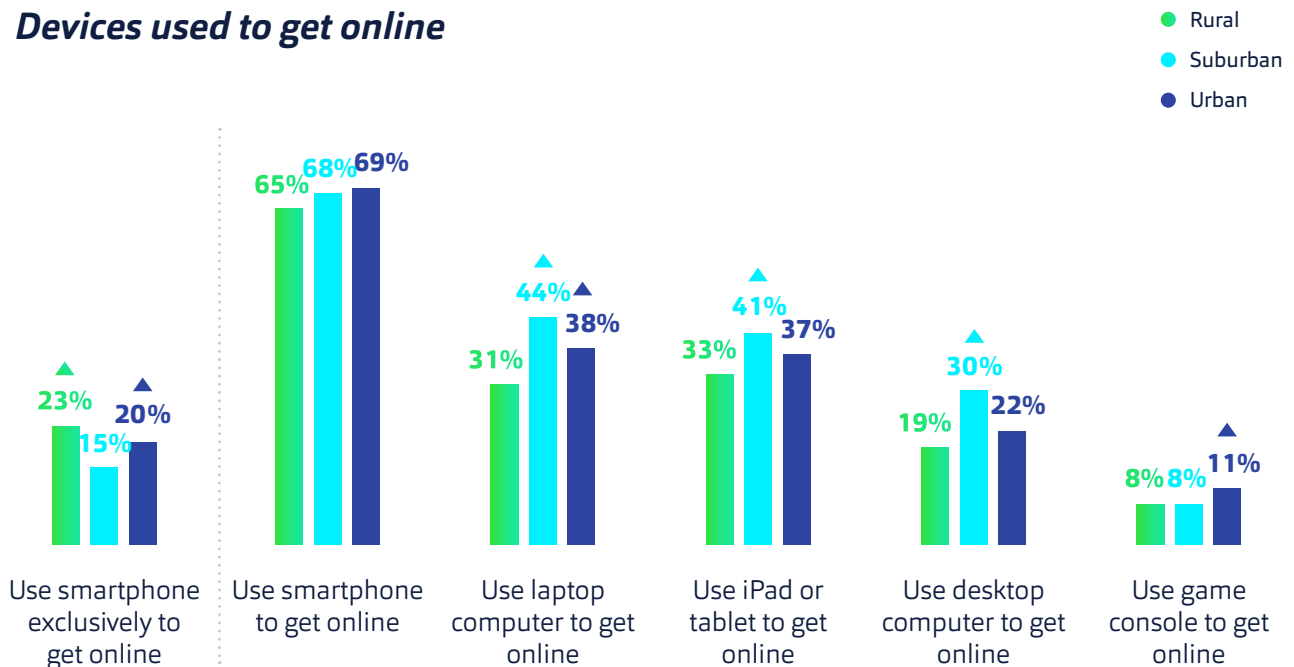


Smartphones are the primary device for online access for all US consumers. The devices used to get online are similar across Coastal and Heartland residents, except for desktop computers, which are more heavily used by Coastal consumers. When looking through the lens of rural/suburban/urban, however, rural Americans are the least likely to access the internet through devices beyond smartphones – including desktops, laptops and tablets. Nearly a quarter of rural Americans only use smartphones for online access.

### Devices used to get online



### Devices used to get online

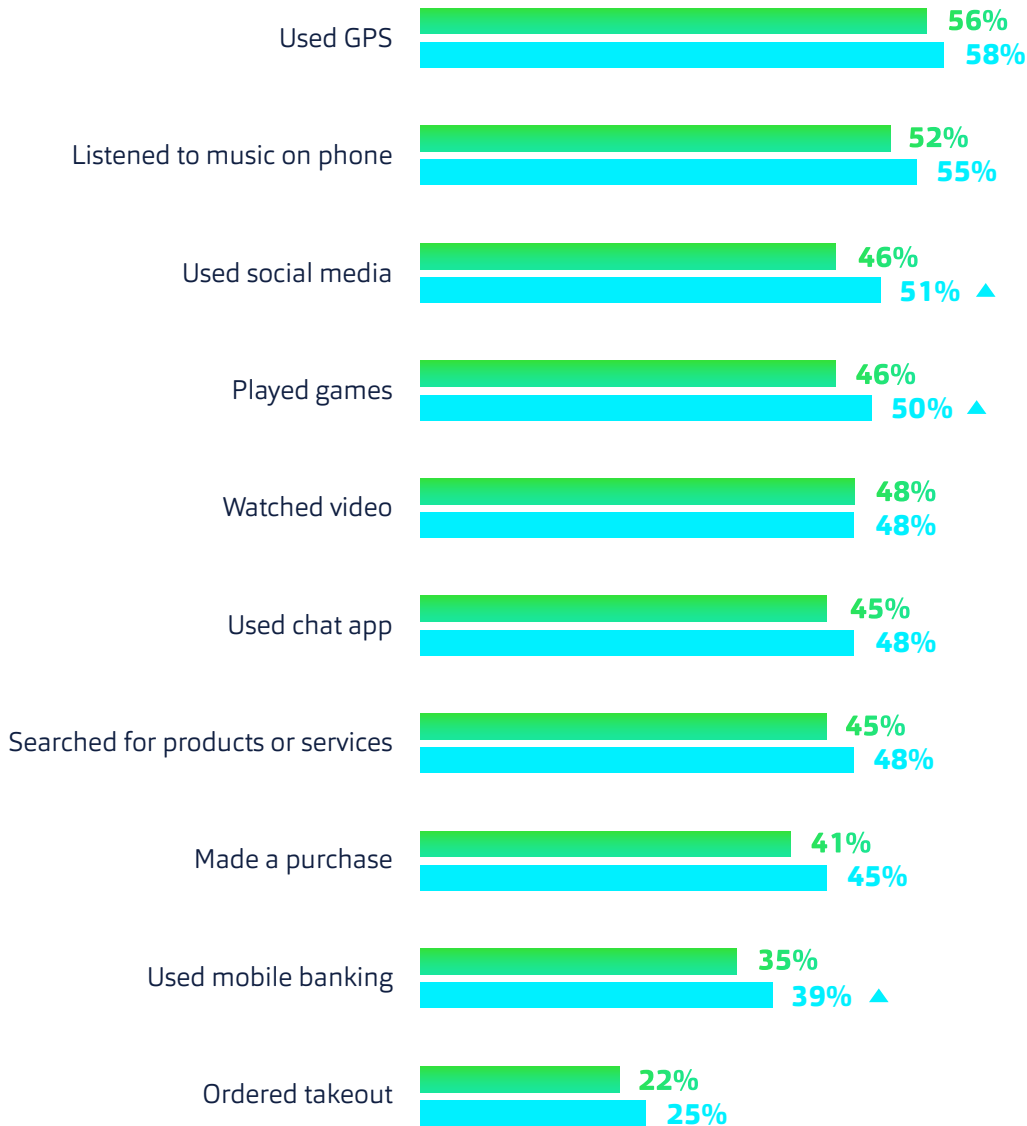


## 2 Smartphone Usage

US consumers are using their smartphones for a wide variety of tasks, with GPS navigation, listening to music and accessing social media being the top 3. Consumers living in the Heartland are more likely to prioritize social interactions and tend to use social networks more, especially Facebook and Snapchat. It is not surprising then, that they are also more likely to use their smartphones for social media than Coastal residents. In addition, Heartland consumers are more likely to play games on their phones and use mobile banking apps.

### *Actions performed on a smartphone in the past week*

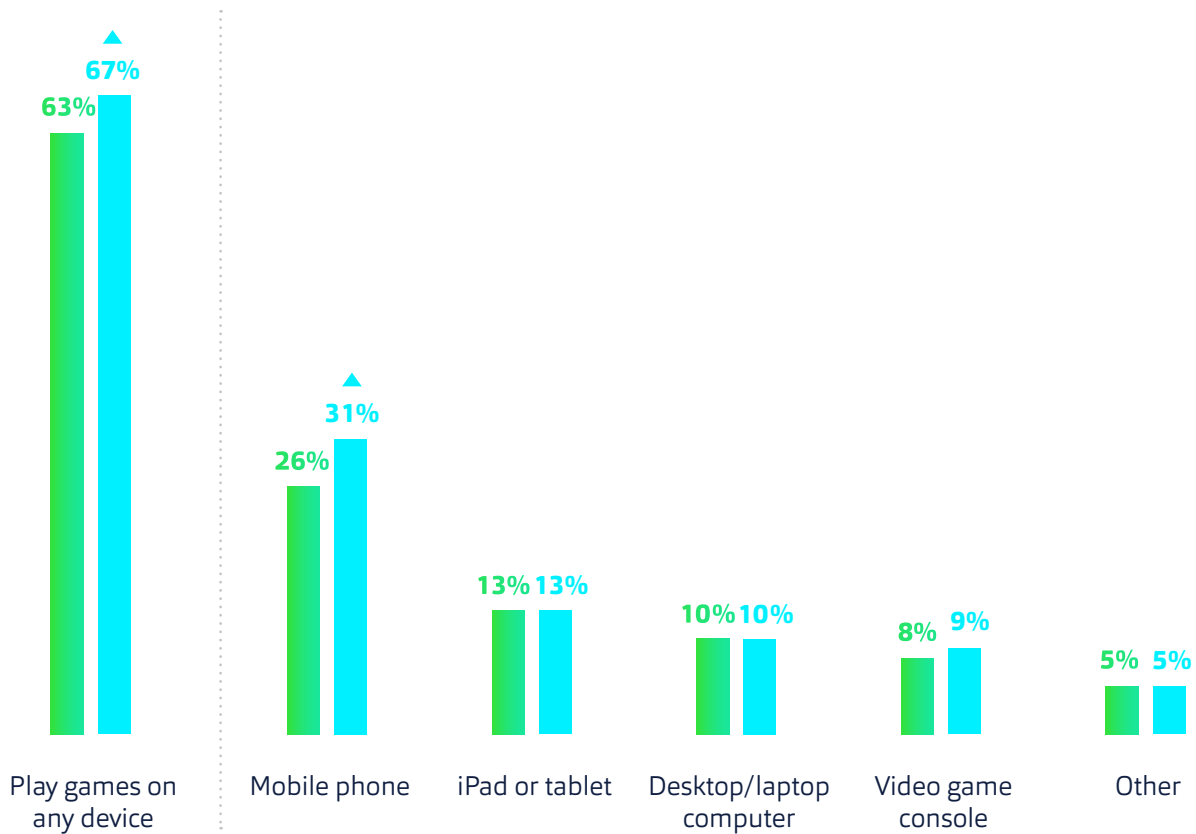
- Coastal consumers
- Heartland consumers



Consumers in the Heartland are significantly more likely to play games and to say that mobile phones are their favorite devices to use for playing games, making them prime targets for app install-focused digital advertising campaigns.

### ***Favorite device for playing games***

- Coastal consumers
- Heartland consumers

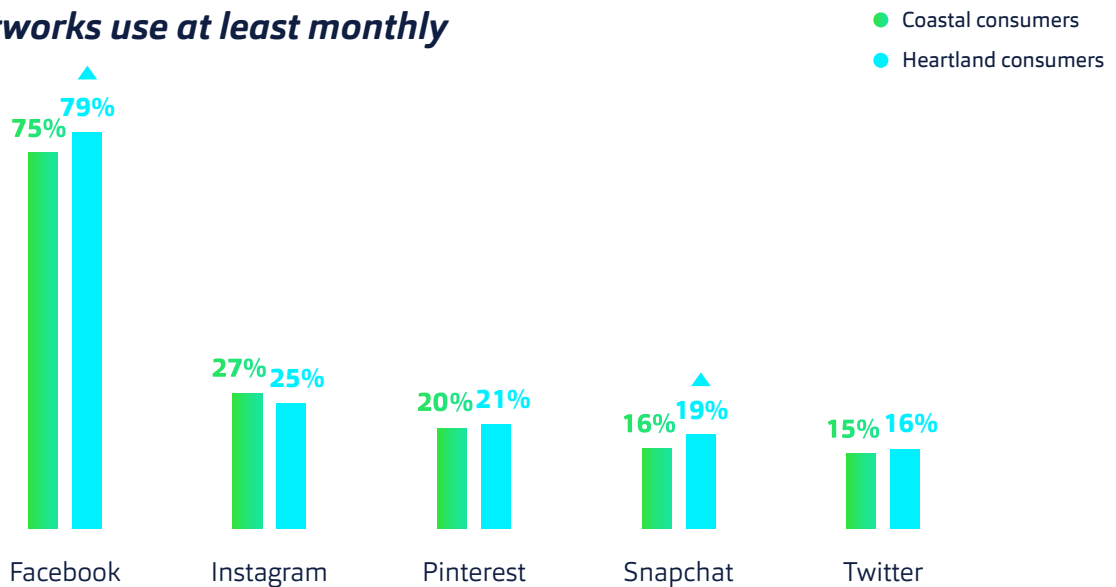


### 3 Social Media

Marketers should consider leveraging different social media channels, depending on the audience they are trying to reach, as social media usage varies substantially by area of residence.

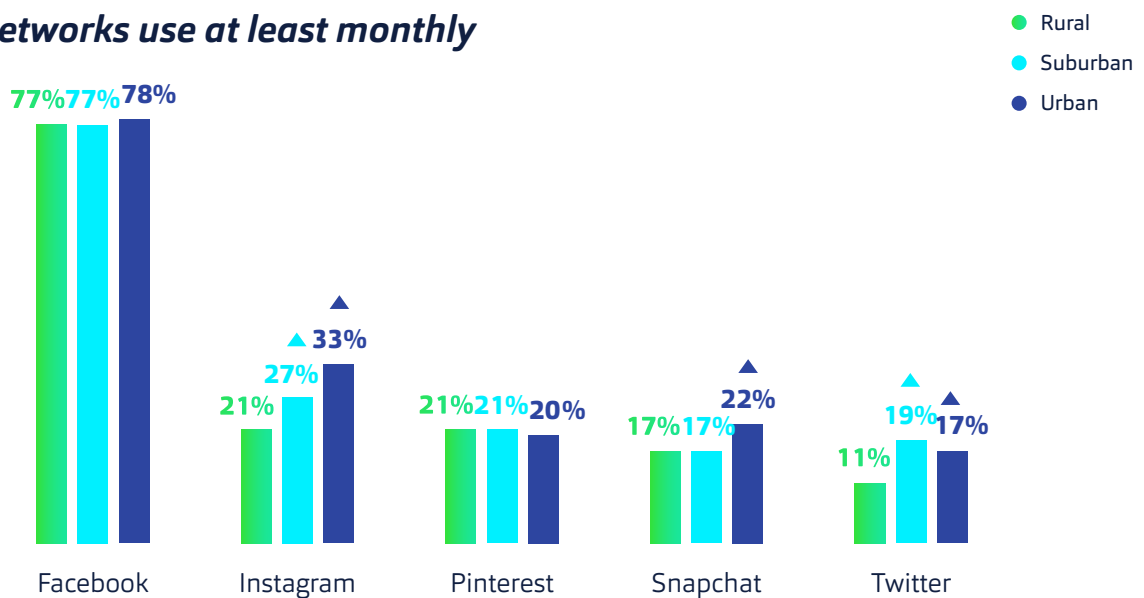
Heartland consumers value community more than their Coastal counterparts and are also more active on social media. They are specifically more likely to use Facebook and Snapchat.

#### Social networks use at least monthly



Marketers will have an easier time reaching urban and suburban consumers via Instagram and Twitter. Urban dwellers also over-index on Snapchat.

#### Social networks use at least monthly

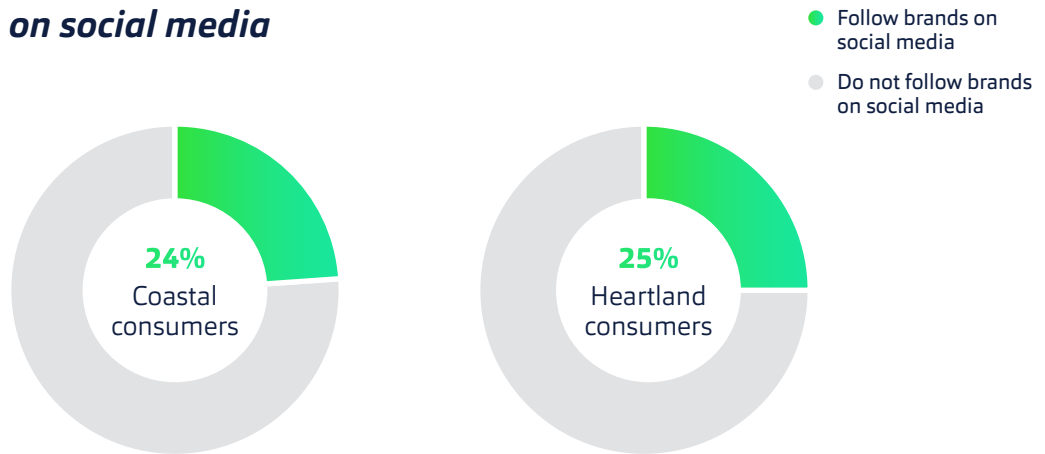




Building an organic social media audience is paramount. About a quarter of Americans, both in the Heartland and along the coasts, say they follow brands on social media, mainly for special promotions and product updates.

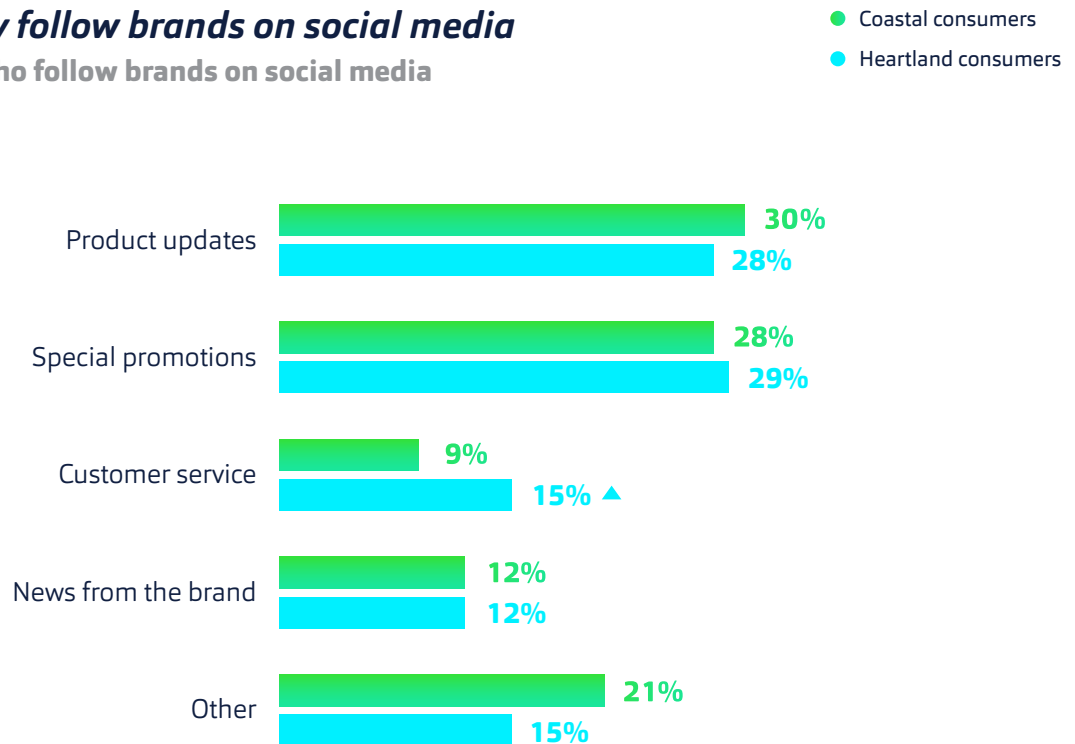
Consider investing in customer service via social media; consumers living in the Heartland are specifically more likely to follow brands on social media for customer service.

### Follow brands on social media



### Reasons they follow brands on social media

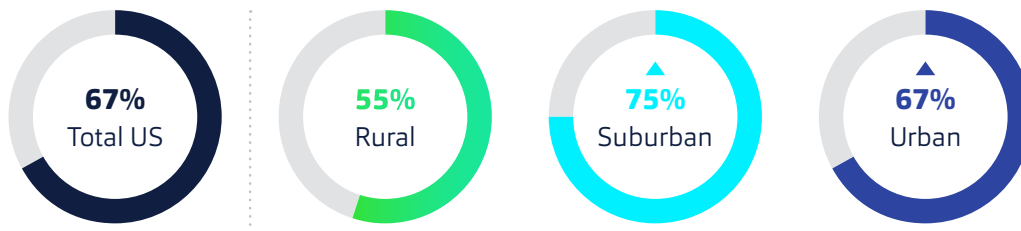
Among those who follow brands on social media



## 4 Television/streaming video watching habits

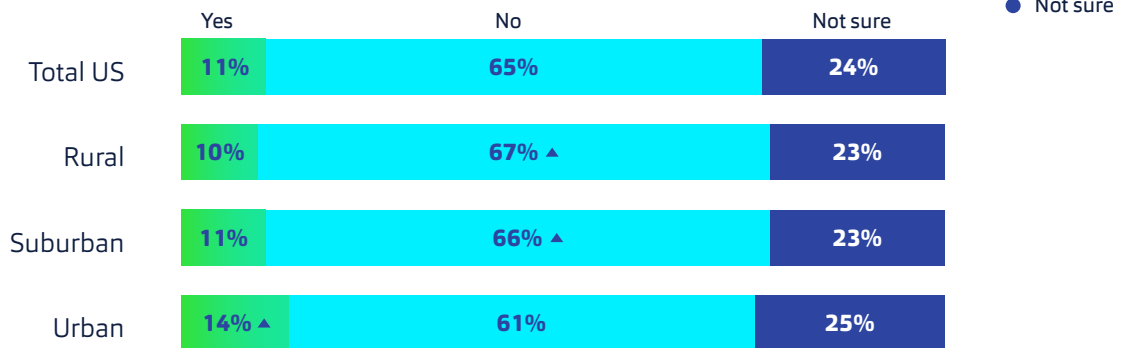
Nearly 7 in 10 US consumers have cable in their households and 11% of them are planning to cut that subscription next year, regardless of whether they live in the Heartland or Coastal states. Suburban consumers are most likely to have cable subscriptions, likely due to their higher incomes. Urban dwellers, on the other hand are significantly more at risk of cutting the cord in the next year (14%). While rural and suburban consumers are cutting the cord primarily because of high cost, urban dwellers are more likely to do so because they aren't watching cable enough, and are watching more streaming video instead. This trend signals an opportunity for OTT brands (such as Netflix) to target promotional messaging to urban dwellers who currently have a cable subscription.

### Have cable in the household



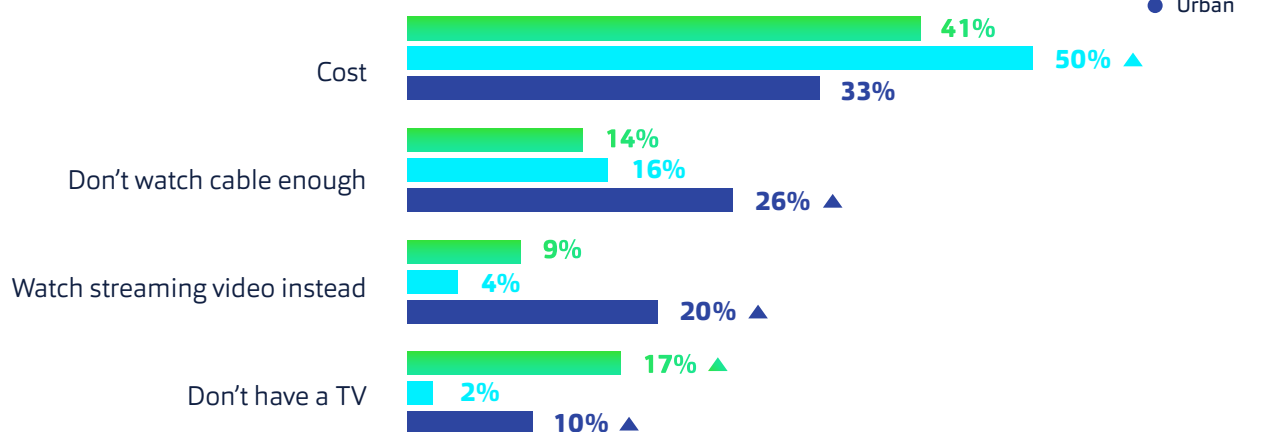
### Planning to cut cable subscription in the next year

Among those who have cable subscription



### Reasons for planning to cut cable subscriptions

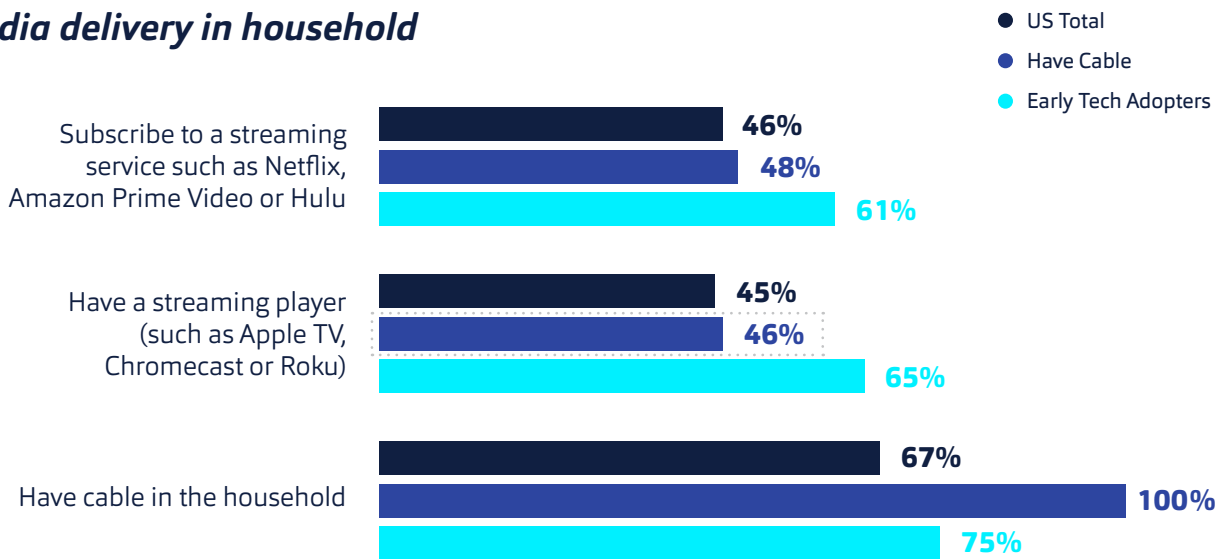
Among those who are planning to cut cable next year



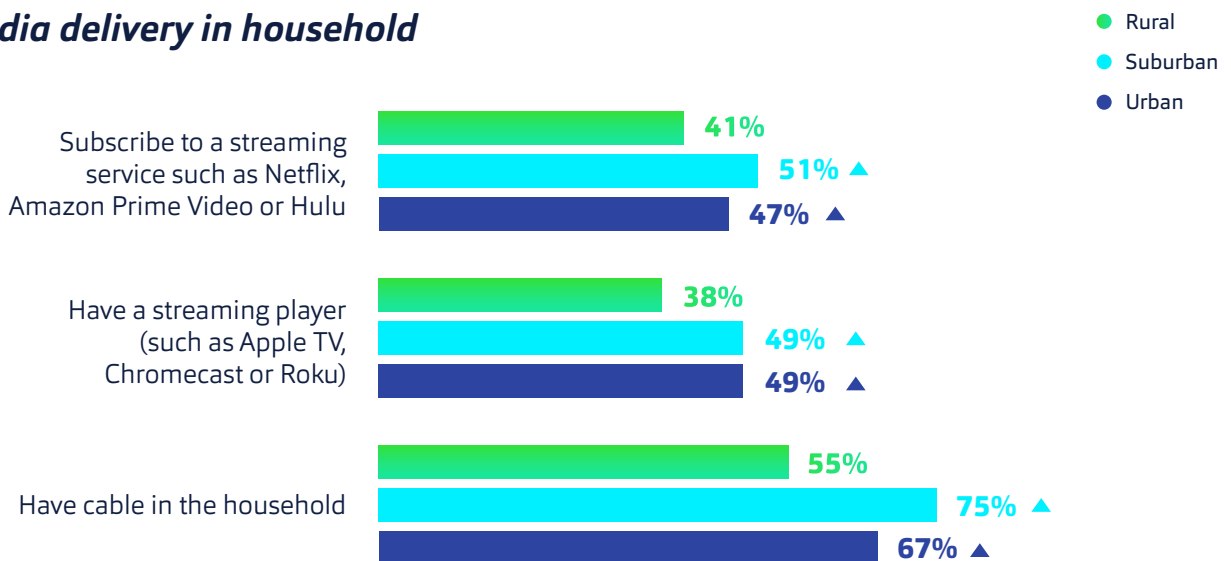
While some consumers are cutting the cord in favor of streaming, this trend is most prevalent in urban areas. Across the country, most consumers aren't cutting cords just yet. In most cases, streaming video is not a replacement for cable, but a supplement. In the US, 48% of households with cable also subscribe to a streaming service (such as Netflix or Hulu) and 46% own a streaming player (such as Apple TV, Chromecast or Roku). Early tech adopters especially have high rates of cable use, streaming subscriptions and streaming player ownership.

Early tech adopters are not cord cutters. In fact, these consumers are more likely to have both cable in the household (75%) and a subscription to a streaming service (61%).

### Media delivery in household



### Media delivery in household



# Methodology

\*The Heartland region is comprised of 26 states in the Southwest, Midwest and parts of the Southeast (AL, AR, FL, GA, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, NC, ND, NE, OH, SC, SD, TN, TX, VA, WI, WV) and is based on a definition designed by the New Heartland Group

Fluent's "Marketing to the Heartland; Media Consumption Survey" study was conducted online within the United States by Fluent, LLC on April 1st, 2017 among 1,670 US consumers (aged 18 and up). Respondents were randomly selected, and the findings are statistically significant at a 95% confidence level. Due to rounding, percentages may not always add up to 100%. Fluent's proprietary ad serving technology includes a real-time survey module that was used to facilitate the data collection for this study.

*Data was weighted to US Census 2010 population distribution and Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.*

<https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>



## ABOUT FLUENT

Fluent, LLC, a cogint company (Nasdaq: COGT), is an industry leader in people-based digital marketing and customer acquisition, serving over 500 leading consumer brands and direct marketers. Leveraging a massive reservoir of proprietary audience data, as well as millions of real-time survey interactions with consumers every day, Fluent enables advertisers to more effectively target and acquire their most valuable customers, with precision, at a massive scale. The company is headquartered in New York City. For more information visit [www.fluentco.com](http://www.fluentco.com).

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