



**tsw
rural**

**Social & Digital
Media Research**

Over 60 million people live in Rural America.

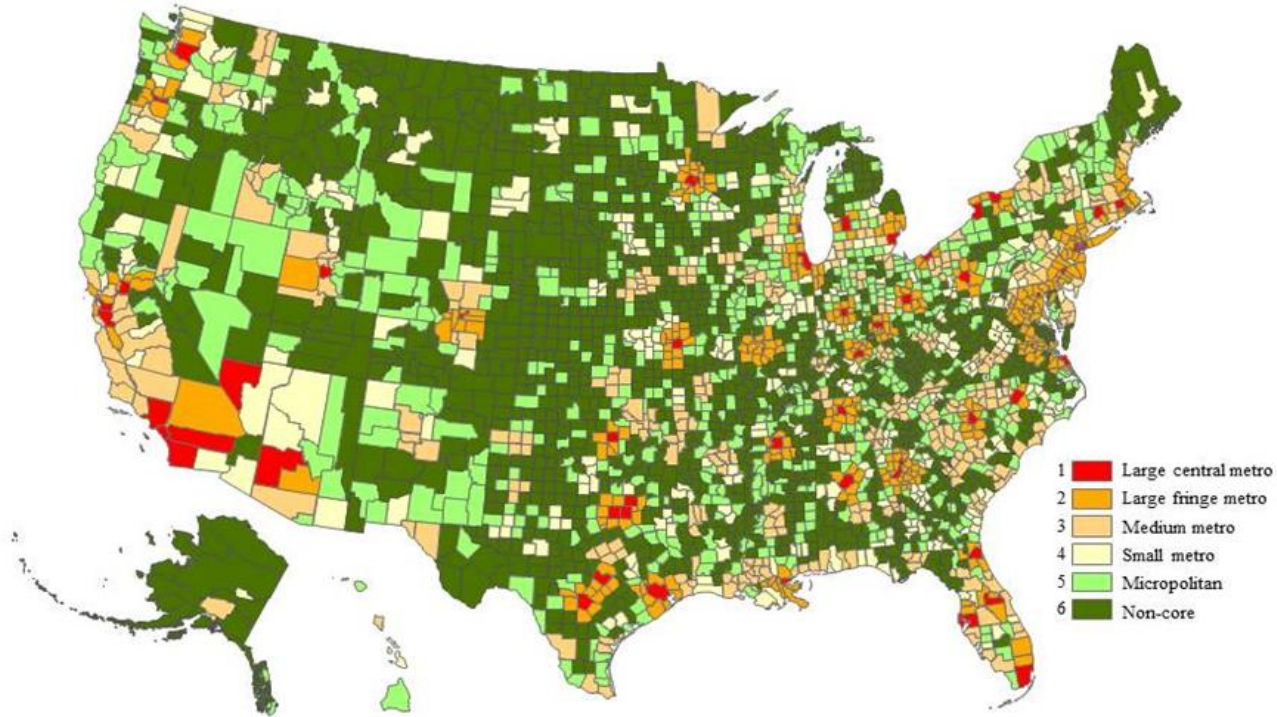
Who are they and why are they an important audience for social and digital media marketing?


Demographic Overview

Demographics by County

	D County	C County	B County	A County
Gender	50.2% Female, 49.8% Male	52.7% Female, 47.3% Male	52% Female, 48% Male	51.7% Female, 48.9% Male
Average Age	57 Years Old	50 Years Old	44 Years Old	46 Years Old
Average Income	\$49,000 Per Year	\$55,000 Per Year	\$63,000 Per Year	\$76,000 Per Year
Race	81.5% White 11.8% African American 6.0% Other 0.7% Asian	85.3% White 6.7% African American 6.0% Other 2.0% Asian	74.3% White 11.4% African American 8.9% Other 5.4% Asian	66.1% White 14.6% African American 10.8% Other 8.4% Asian
Ethnicity	92.8% Non-Hispanic 7.2% Hispanic	89.3% Non-Hispanic 10.7% Hispanic	84.7% Non-Hispanic 14.3% Hispanic	79.1% Non-Hispanic 20.9% Hispanic
Average Number of People in Household	Eight or more	One	Six	Seven

US Audience Population



A person wearing a red and black plaid shirt is standing in a field of golden wheat. They are holding a smartphone in their hands, looking down at it. The background is a vast, open field under a bright sky.

**RURAL AMERICANS DON'T HAVE
ACCESS TO TECH & INTERNET LIKE
THEIR URBAN COUNTERPARTS**

**But that doesn't mean they don't
act the same online**

Importance of Online Rural Shoppers

- Rural consumers are responsible for more than 10.8 billion internet-driven transactions annually, out of 69.9 billion - so this audience represents 15% of all internet-driven transactions.
- Estimated value of rural online transactions is nearly \$1.4 trillion.
- 45% of rural residents go online weekly to make a purchase.
- 58% of Americans in rural areas have shopped on marketplaces, 71% at large retailer sites, 39% on web stores or independent boutiques, and 40% at category-specific online stores.

Rural American's access to the internet is growing every year.

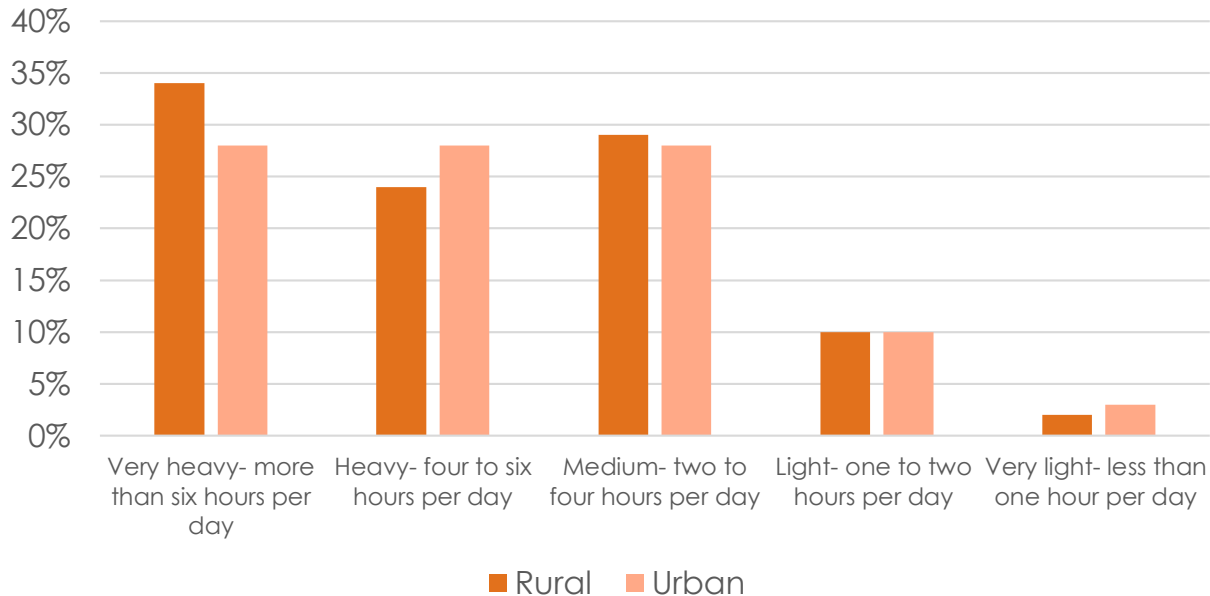
Internet Usage at Home

Most of C & D county Internet consumption comes from a computer, cell phone, or tablet device. Because of this, social and digital media marketing play a huge role in connecting to these rural consumers.

Internet Usage by County				
	D County	C County	B County	A County
Computer	83	103	101	104
Cell phone or tablet	80	91	103	107
TV	50	85	106	117

Rural vs. Urban Internet Usage Levels

Rural consumers index higher than their urban counterparts, spending more than 6 hours a day on the Internet. They are also a near-match on medium to very light internet usage to urban consumers.



RURAL CONSUMERS ARE GROWING IN ONLINE PRESENCE AND INTERNET USAGE YEAR AFTER YEAR



What exactly are they doing
online?

Social Media Influence for Rural Consumers

- 58% of rural residents use social media networks, falling behind urban residents at 64%.
- 51% of rural residents use social media.
- 30% of online shoppers say they would be likely to make a purchase from a social media network like Facebook, Pinterest, Instagram, Twitter, or Snapchat.
- 31% of shoppers said social media helped influence their buying decision.
- 25% of Rural Americans are more likely to buy something after seeing an ad on social media.



Usage of Online Platforms by Age

Social media is not just for millennials. The average age of 49-51 for C & D county consumers are very active on social media platforms, such as Facebook & YouTube.

Online Usage by Age							
	Facebook	YouTube	Pinterest	Instagram	Snapchat	Linkedin	Twitter
Men	62%	75%	16%	30%	23%	25%	23%
Women	74%	72%	41%	39%	31%	25%	24%
Ages 18-29	81%	91%	34%	64%	68%	29%	40%
Ages 30-49	78%	85%	34%	40%	26%	33%	27%
Age 50-64	65%	68%	26%	21%	10%	24%	19%
Age 65+	41%	40%	16%	10%	3%	9%	8%
Rural	58%	59%	28%	25%	18%	13%	17%

Social Media Consumption

C & D county consumers stay relatively on par with A & B county counties in terms of weekly social media consumption.

Social Media Consumption by County				
	D County	C County	B County	A County
1-2 x per day	23.7%	25.4%	24.4%	23.9%
3+ x per day	47.9%	39.7%	46.4%	48.2%
4-6 x per week	12.3%	11.3%	11.4%	9.5%
1-3 x per week	8.6%	13.0%	9.9%	11.8%
Less than once a week	7.5%	10.6%	7.9%	6.6%

Brand Engagement

Rural residents utilize social media to not only stay up-to-date with their friends, but also to stay engaged with their favorites businesses.

Brand Engagement		
	Rural	Urban
Product updates	28%	30%
Special promotions	29%	28%
Customer service	15%	9%
Brand news	12%	12%
Other	15%	21%

Social Media Statements

Social Statements by County				
	D County	C County	B County	A County
I talk about things I see on social media in face-to-face conversations.	84	92	106	104
Social media is a way for me to tell people about companies & products that I like.	84	88	898	111
Sometimes I post ratings or reviews online for other consumers to read.	74	80	112	107
I like to follow my favorite brands or companies on social media.	79	65	103	116
I am more likely to purchase products I see advertised on social media.	83	83	99	112
I often click on links or items posted by others on social media .	106	90	101	100
I am more likely to purchase products I see used or recommended by friends on social media.	88	84	98	111
I trust product information that I get from social media more than other sources.	112	68	102	105

Source: Simmons Market Research
 Simmons Market Research is based on National Average which is represented by 100

Purchasing Behavior

Rural consumers are adapting to making online purchases using their mobile devices. Of those rural consumers who do purchase items online, 51% use a computer while 42% use their smartphone.

- 36% of rural consumers purchased a product after seeing a mobile notification.
- 30% of rural consumers purchased a product after seeing an ad on TV.
- **25% of rural consumers purchased a product after seeing an ad on social media.**
- 20% of rural consumers purchased a product after seeing a promotion in an email marketing newsletter.
- 19% of rural consumers purchased a product after hearing an ad on the radio.
- 13% of rural consumers purchased a product after seeing an online banner ad.

A person wearing a red and white plaid shirt is holding a smartphone in a field of golden wheat. The background is a soft-focus field of wheat under warm, golden light.

SOCIAL MEDIA IS A GREAT WAY TO CONNECT WITH RURAL CONSUMERS AND GROW BRAND AWARENESS

**Let's review how a good paid
search program will help to reach
rural consumers**

Paid Search for Product Discovery

Paid search is an essential component to any marketing mix. It makes it easy for rural consumers to find your brand or stores online.

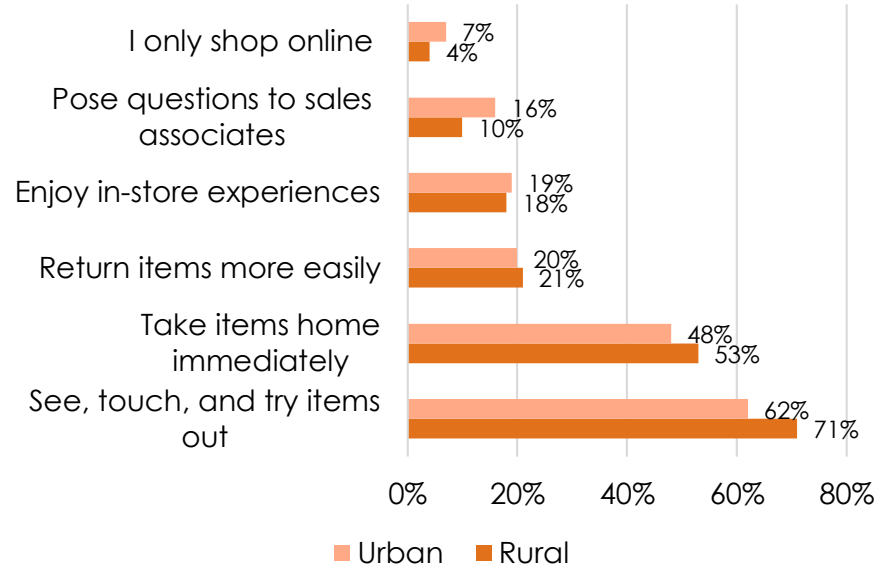
The most popular ways consumers find new products are:

- In-store browsing (59%)
- Word-of-mouth from friends, family, colleagues (57%)
- Using a search engine (47%)
- Articles in print magazines/newspapers (34%)

Paid Search for Product Discovery

- Rural shoppers are more inclined to go into a store for purchases, but they do their research online before going.
- Ensuring your brand is easily accessible through social media and paid search is key for brand discovery with rural shoppers.

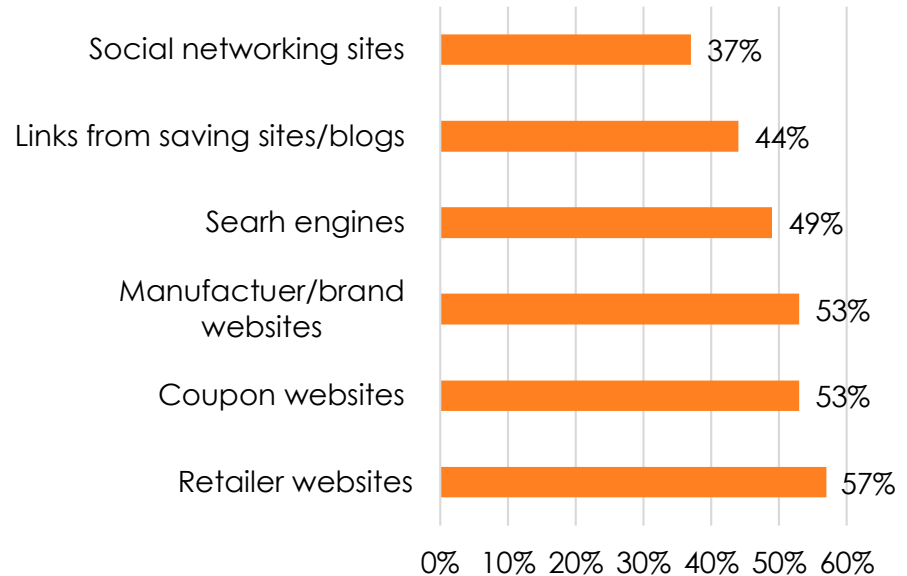
In-store vs Online Shopping



Utilization of Paid Search

- Consumers are turning to websites as the first option to search for deals.
- 53% of consumers then use coupon websites (RetailMeNot, Coupons.com, etc.) for their online expenditures.
- 53% also use manufacturing and brand websites to obtain cheaper options instead of purchasing from large retailers.

Online Search Breakdown





**RURAL CONSUMERS ARE PRICE-
CONSCIOUS AND LOOK FOR
SAVINGS IN BOTH DIGITAL & PRINT**

**Why is the affiliate channel key to
influencing rural shoppers?**

Impact of Affiliate Marketing on Consumers

- 86% of the shoppers surveyed said coupons have influenced them to try a new product.
- 84% of shoppers say coupons influence their store choices.
- 77% decide which stores to shop based on where they can use paper coupons.
- 75% of those surveyed print coupons from the internet and then take in-store to purchase.
- 71% of Americans' purchasing behaviors are influenced by their ability to find a coupon or discount online.
- 67% decide which store to shop based on where they can use paperless discounts.



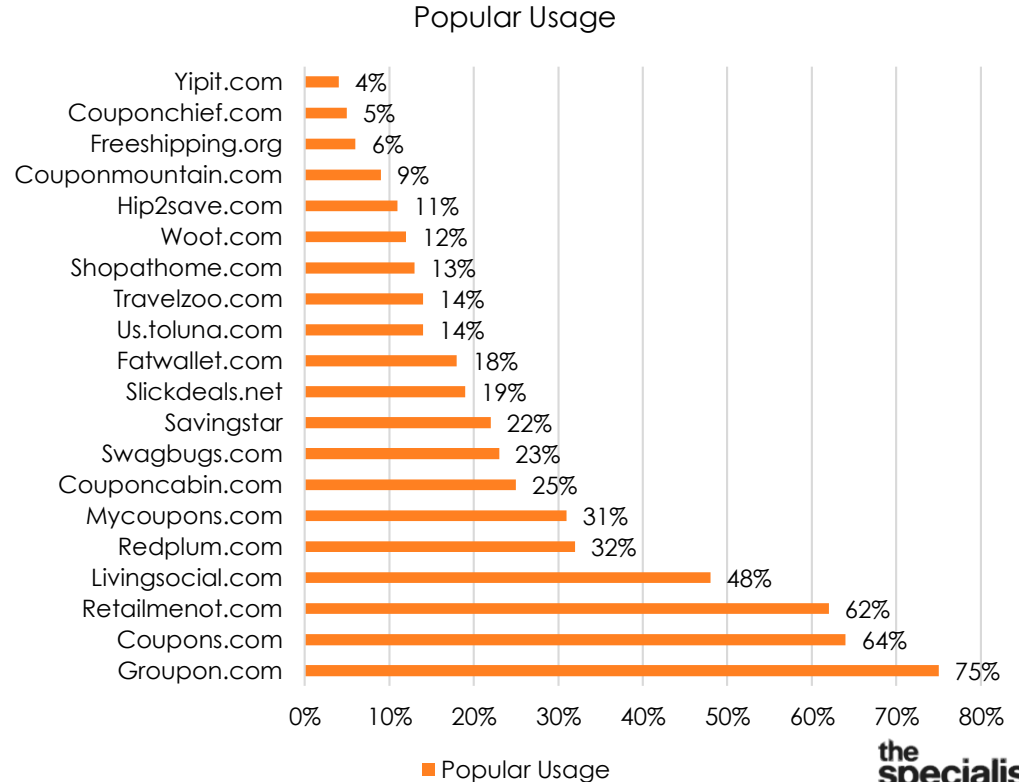
Popular Coupon Sites Visited

- D county consumers are less likely to use digital coupons because they still prefer traditional print options
- C county consumers continue using print coupons, but they are growing in terms of their use of online coupons.
- C county residents are more tech-savvy than D county residents.
- Rural consumers are less likely to use coupon sites like Groupon or Living Social because those sites are targeted to large metro areas.

Popular Sites Visited by County				
	D County	C County	B County	A County
Coupons.com	49	102	136	92
Groupon	33	40	123	127
Living Social	6	33	140	127

Top Affiliate Sites Used by all Consumers

- 64% of consumers use Coupons.com.
- 62% of consumers are aware of and use RetailMeNot.
- The most used coupons from affiliate sites are:
 - Groceries
 - Restaurants
 - Household goods
 - Apparel
 - Healthy & beauty



Popular Rural Retailers in the Affiliate Channel

- National chain grocery stores such as Safeway, Kroger, Publix and Wal-Mart, were some of the first stores to offer digital coupons.
- Dollar General then followed suit launching a partnership with Coupons.com.
- Ace Hardware also began online coupons for customers to have on their mobile device and even via text message.
- More than half of U.S. digital coupon users have found deals through emails from retailers, or through search engine websites like Google and Bing on their phones.

A conceptual image showing a small metal shopping cart filled with several cardboard boxes, resting on a laptop keyboard. The background is a blurred laptop screen, suggesting online shopping. The text is overlaid on the image in a white, bold, sans-serif font.

RURAL CONSUMERS ARE BECOMING INCREASINGLY TECH-SAVVY AND MORE INVOLVED ONLINE

It is essential to have strong omni-
channel marketing to reach
rural consumers and ensure the
message sticks

RURAL PARTNERSHIP

C & D county consumers are relatively untapped, very responsive, and key to the bottom line

TSWRural has the resources, expertise, and experience to reach the highly-desirable rural market

Phone: (888) 506-6055

Email: contact@tswrural.com

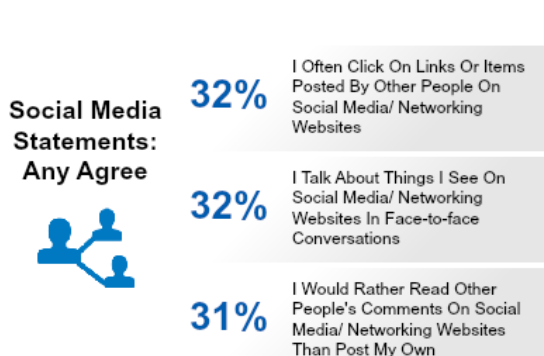
A wide-angle photograph of a vast, golden field of crops, likely corn, under a bright, hazy sky. In the distance, a tractor is pulling two large trailers, and another tractor is visible further away. The overall scene is bathed in warm, golden light, suggesting a sunrise or sunset.

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Appendix

Social Media Activity Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	11,070	238,468	100%
Target: D County	1,019	35,753	15%



Percent Index



Social Media Websites: Last 7 Days 5 of Top Websites

There is no data available for this chart

Social Media Consumption by Device (Last 7 Days)

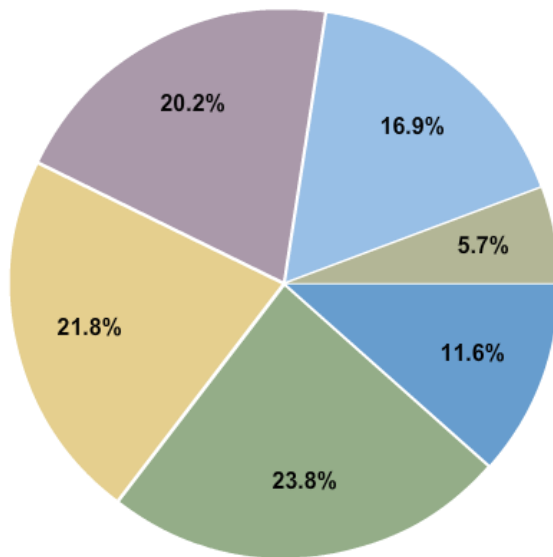
Appendix

Mobile World Segmentation

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Pie Bar

Mobile World



Mobile Professionals

Multiple feature users; cell phones help them keep up with their professional life in addition to their personal life; more likely to own a smart phone; cell phone has become their all-in-one device for their communication and information needs

Mbirati

Represent the mobile generation; grew up with cell phones and can't imagine life without them; cell phones are a central part of their everyday lives

Basic Planners

Not into cell phones or the world of technology; use their cell phone for the basics; cell phone is just another communication device

Social Connectors

Communication is central in their lives; cell phones allow them to keep up to date with friends and social events and serve as the bridge to their social world

Pragmatic Adopters

Cell phones came to life in their adulthood; still learning there are other things to do with your phone beyond just saying "Hello"; cell phones are more a part of their everyday lives than before but still more functional than entertaining to them

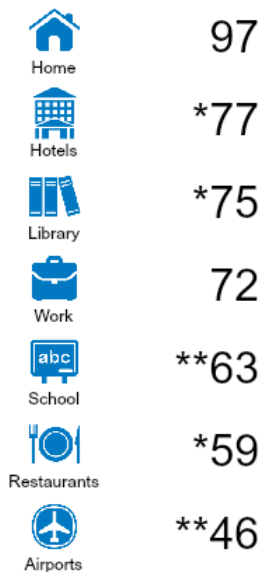
Do Not Own Cell Phone

Appendix

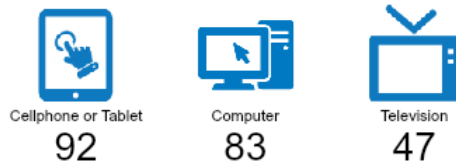
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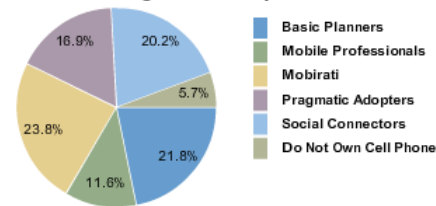
Internet Location Accessed Most Often



Internet at Home: Usage Access



Mobile Segment Composition



Smartphone Activity Index



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Social Media Activity Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	11,070	238,468	100%
Target: C County	910	31,592	13.2%

Social Media Statements: Any Agree



- 37%** I Would Rather Read Other People's Comments On Social Media/ Networking Websites Than Post My Own
- 35%** I Talk About Things I See On Social Media/ Networking Websites In Face-to-face Conversations
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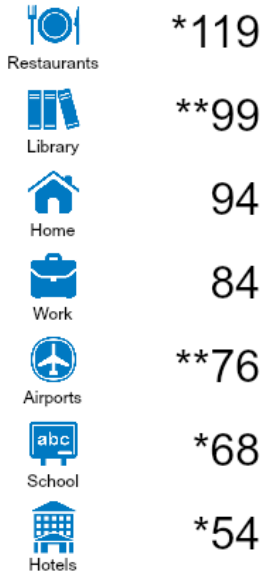
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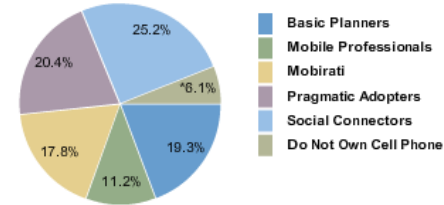
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Internet at Home: Usage Access



Mobile Segment Composition



Smartphone Activity Index

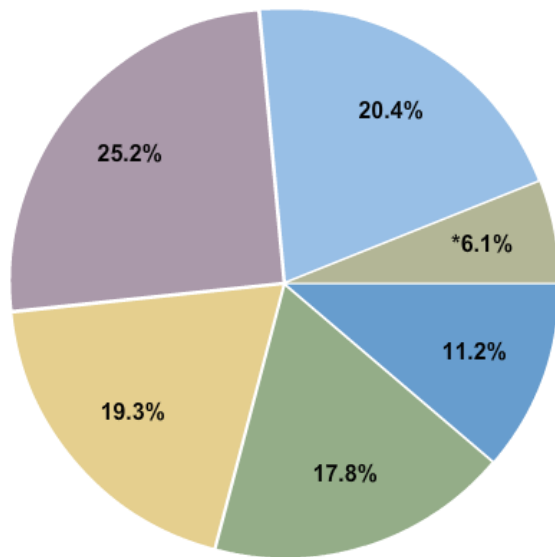
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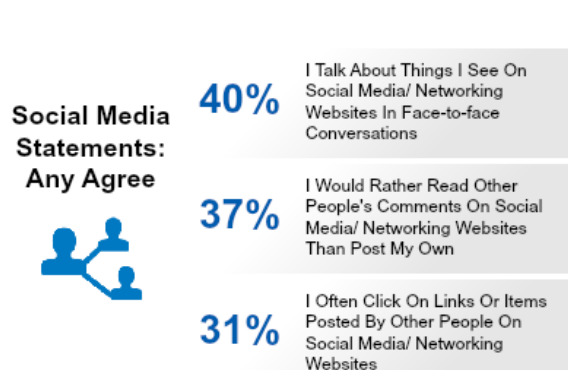
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Do Not Own Cell Phone

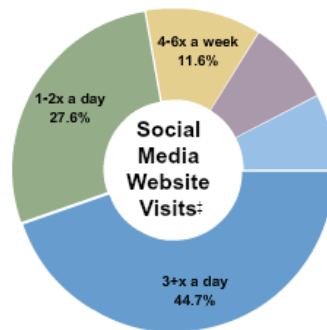
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Social Media Activity Profile

	Sample	Weighted (000)	Percentage
Base: All Adults	11,070	238,468	100%
Target: B County	2,267	70,454	29.5%



Percent Index



Social Media Websites: Last 7 Days
5 of Top Websites

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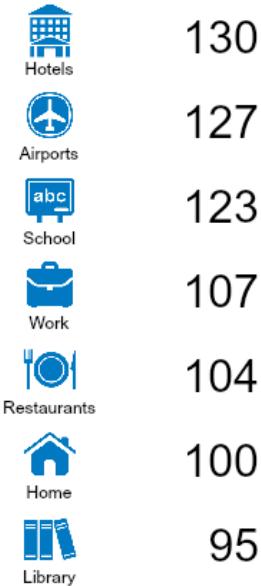
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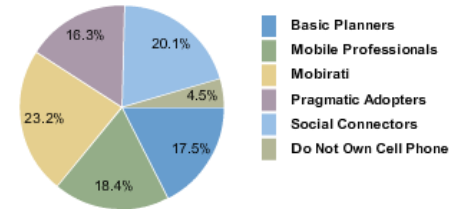
Internet Location Accessed Most Often



Internet at Home: Usage Access



Mobile Segment Composition



Smartphone Activity Index



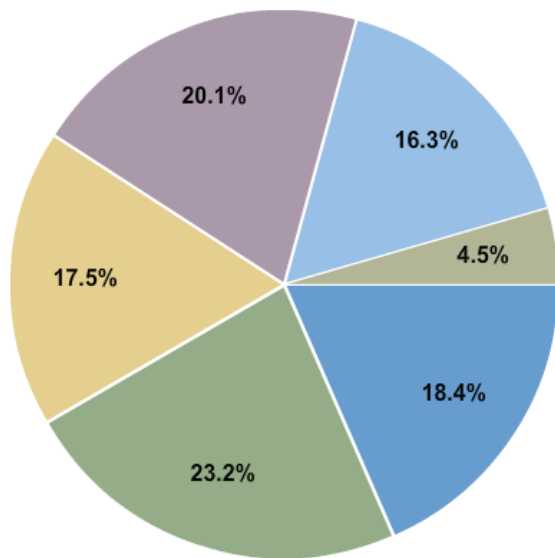
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	Sample	Weighted (000)	Percentage
Base: All Adults	11,070	238,468	100%
Target: A County	6,874	100,668	42.2%

Social Media Statements: Any Agree



39%

I Talk About Things I See On Social Media/ Networking Websites In Face-to-face Conversations

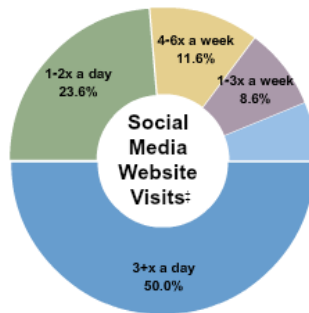
37%

I Would Rather Read Other People's Comments On Social Media/ Networking Websites Than Post My Own

33%

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Percent Index



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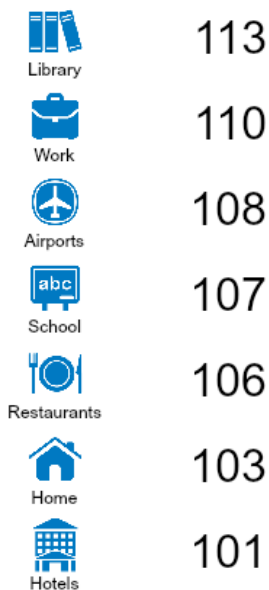
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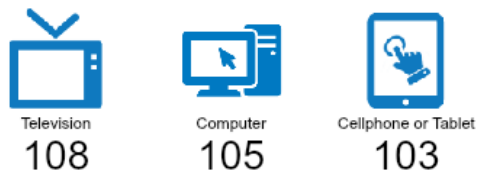
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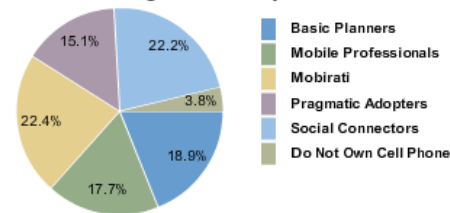
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Internet at Home: Usage Access



Mobile Segment Composition



Smartphone Activity Index



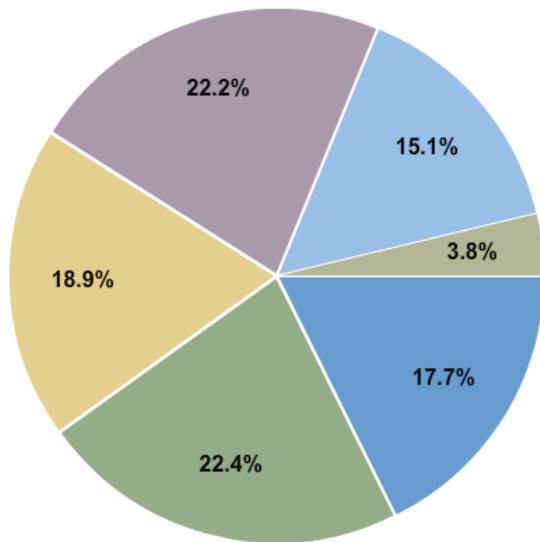
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Do Not Own Cell Phone

Appendix

	D	C	SOCIAL MEDIA USER	B	A		D	C	SOCIAL MEDIA USER	B	A
	458	383	3,357	976	2,992						
	17,313	15,447	84,870	33,715	48,697		137	142	1,452	362	1,031
MALE	48.4%	48.9%	46.4%	47.9%	48.4%	35 - 44	5,294	5,600	34,483	11,554	17,062
	15.0%	13.4%	73.7%	29.3%	42.3%		14.8%	17.7%	18.9%	16.4%	16.9%
	100	101	96	99	100		13.4%	14.2%	87.3%	29.2%	43.2%
	7.3%	6.5%	35.6%	14.1%	20.4%		89	107	114	99	102
	561	527	4,807	1,291	3,882		2.2%	2.3%	14.5%	4.8%	7.2%
	18,440	16,145	97,952	36,739	51,971		177	143	1,598	419	1,286
FEMALE	51.6%	51.1%	53.6%	52.1%	51.6%	45 - 54	6,781	4,615	32,126	12,344	18,300
	15.0%	13.1%	79.4%	29.8%	42.2%		19.0%	14.6%	17.6%	17.5%	18.2%
	100	99	104	101	100		16.1%	11.0%	76.4%	29.4%	43.5%
	7.7%	6.8%	41.1%	15.4%	21.8%		108	83	100	99	103
	86	65	995	186	725		2.8%	1.9%	13.5%	5.2%	7.7%
	3,613	2,868	26,766	9,157	12,548		229	191	1,514	445	1,313
18 - 24	10.1%	9.1%	14.6%	13.0%	12.5%	55 - 64	6,443	6,194	28,782	11,288	16,547
	12.8%	10.2%	95.0%	32.5%	44.5%		18.0%	19.6%	15.7%	16.0%	16.4%
	86	77	124	110	105		15.9%	15.3%	71.1%	27.9%	40.9%
	1.5%	1.2%	11.2%	3.8%	5.3%		106	116	93	94	97
	135	128	1,372	325	898		2.7%	2.6%	12.1%	4.7%	6.9%
	6,320	5,213	38,856	12,750	17,322		255	241	1,233	530	1,621
25 - 34	17.7%	16.5%	21.3%	18.1%	17.2%	65+	7,303	7,102	21,809	13,360	18,890
	15.2%	12.5%	93.4%	30.6%	41.6%		20.4%	22.5%	11.9%	19.0%	18.8%
	101	95	122	104	99		15.7%	15.2%	46.7%	28.6%	40.5%
	2.7%	2.2%	16.3%	5.3%	7.3%		104	115	61	97	96
	137	142	1,452	362	1,031		3.1%	3.0%	9.1%	5.6%	7.9%
	5,294	5,600	34,483	11,554	17,062		173	159	638	329	1,003
35 - 44	14.8%	17.7%	18.9%	16.4%	16.9%	70+	4,616	4,904	11,306	8,554	11,650
	13.4%	14.2%	87.3%	29.2%	43.2%		12.9%	15.5%	6.2%	12.1%	11.6%
	89	107	114	99	102		15.5%	16.5%	38.0%	28.8%	39.2%
	2.2%	2.3%	14.5%	4.8%	7.2%		104	125	50	97	93
							1.9%	2.1%	4.7%	3.6%	4.9%

Appendix

	D	C	B	A
	316	314	823	2,346
	11,397	11,036	28,191	39,500
I TALK ABOUT THINGS I SEE ON SOCIAL MEDIA/ NETWORKING WEBSITES IN FACE-TO-FACE CONVERSATIONS	31.9%	34.9%	40.0%	39.2%
	12.6%	12.2%	31.3%	43.8%
	84	92	106	104
	4.8%	4.6%	11.8%	16.6%
	144	137	376	1,261
	5,572	5,153	12,830	20,696
SOCIAL MEDIA/ NETWORKING WEBSITES ARE A WAY FOR ME TO TELL PEOPLE ABOUT COMPANIES AND PRODUCTS THAT I LIKE	15.6%	16.3%	18.2%	20.6%
	12.6%	11.6%	29.0%	46.8%
	84	88	98	111
	2.3%	2.2%	5.4%	8.7%
	110	124	359	1,024
	4,349	4,174	13,090	17,799
I SOMETIMES POST RATINGS OR REVIEWS ONLINE FOR OTHER CONSUMERS TO READ	12.2%	13.2%	18.6%	17.7%
	11.0%	10.6%	33.2%	45.2%
	74	80	112	107
	1.8%	1.8%	5.5%	7.5%
	131	131	381	1,209
	5,253	3,849	13,548	21,858
I LIKE TO FOLLOW MY FAVORITE BRANDS OR COMPANIES ON SOCIAL MEDIA/ NETWORKING WEBSITES	14.7%	12.2%	19.2%	21.7%
	11.8%	8.6%	30.4%	49.1%
	79	65	103	116
	2.2%	1.6%	5.7%	9.2%

	D	C	B	A
	298	306	791	2,166
	11,052	11,785	25,911	36,753
I WOULD RATHER READ OTHER PEOPLE'S COMMENTS ON SOCIAL MEDIA/ NETWORKING WEBSITES THAN POST MY OWN	30.9%	37.3%	36.8%	36.5%
	12.9%	13.8%	30.3%	43.0%
	86	104	103	102
	4.6%	4.9%	10.9%	15.4%
	74	72	201	653
	2,780	2,445	6,534	10,566
I AM MORE LIKELY TO PURCHASE PRODUCTS I SEE ADVERTISED ON A SOCIAL MEDIA/ NETWORKING WEBSITE	7.8%	7.7%	9.3%	10.5%
	12.5%	11.0%	29.3%	47.3%
	83	83	99	112
	1.2%	1.0%	2.7%	4.4%
	95	102	233	748
	4,101	3,909	9,242	14,477
WITHOUT ACCESS TO SOCIAL MEDIA/NETWORKING WEBSITES, I WOULD FEEL LESS CONNECTED TO OTHER PEOPLE	11.5%	12.4%	13.1%	14.4%
	12.9%	12.3%	29.1%	45.6%
	86	93	99	108
	1.7%	1.6%	3.9%	6.1%
	242	248	659	2,005
	10,292	9,793	21,297	32,874
PEOPLE FREQUENTLY SEND ME REQUESTS TO CONNECT WITH THEM ON A SOCIAL MEDIA/ NETWORKING WEBSITE	28.8%	31.0%	30.2%	32.7%
	13.9%	13.2%	28.7%	44.3%
	92	100	97	105
	4.3%	4.1%	8.9%	13.8%

Appendix

	D	C	B	A		D	C	B	A
	215	216	485	1,498		280	253	653	1,864
	8,550	7,910	16,375	24,538		11,611	8,736	21,690	30,909
I OFTEN POST OR COMMENT ON SOCIAL MEDIA/ NETWORKING WEBSITES	23.9%	25.0%	23.2%	24.4%	I OFTEN CLICK ON LINKS OR ITEMS POSTED BY OTHER PEOPLE ON SOCIAL MEDIA/ NETWORKING WEBSITES	32.5%	27.7%	30.8%	30.7%
	14.9%	13.8%	28.5%	42.8%		15.9%	12.0%	29.7%	42.4%
	99	104	97	101		106	90	101	100
	3.6%	3.3%	6.9%	10.3%		4.9%	3.7%	9.1%	13.0%
	*53	61	157	522		219	235	575	1,742
	*3,158	1,695	5,642	8,305	I OFTEN ACCESS SOCIAL MEDIA/ NETWORKING WEBSITES FROM DIFFERENT DEVICES	8,614	8,195	20,053	31,269
I TRUST PRODUCT INFORMATION THAT I GET FROM SOCIAL MEDIA/NETWORKING WEBSITES MORE THAN OTHER SOURCES	*8.8%	5.4%	8.0%	8.3%		24.1%	25.9%	28.5%	31.1%
	*16.8%	9.0%	30.0%	44.2%		12.6%	12.0%	29.4%	45.9%
	*112	68	102	105		84	91	100	109
	*1.3%	0.7%	2.4%	3.5%		3.6%	3.4%	8.4%	13.1%
	185	220	584	1,815		121	121	332	1,084
	7,723	7,330	19,204	30,912	I AM MORE LIKELY TO PURCHASE PRODUCTS I SEE USED OR RECOMMENDED BY FRIENDS ON SOCIAL MEDIA/ NETWORKING WEBSITES	5,063	4,265	11,083	18,039
I PAY ATTENTION TO RATINGS AND REVIEWS POSTED ONLINE BY OTHER CONSUMERS	21.6%	23.2%	27.3%	30.7%		14.2%	13.5%	15.7%	17.9%
	11.9%	11.2%	29.5%	47.4%		13.2%	11.1%	28.8%	46.9%
	79	85	100	112		88	84	98	111
	3.2%	3.1%	8.1%	13.0%		2.1%	1.8%	4.6%	7.6%
	686	679	1,711	5,088		150	127	355	1,008
	25,821	23,626	54,819	78,556		6,643	5,654	13,409	17,452
SOCIAL MEDIA USER	72.2%	74.8%	77.8%	78.0%	I OFTEN INVITE OR SEND REQUESTS TO CONNECT WITH OTHERS ON SOCIAL MEDIA/ NETWORKING WEBSITES	18.6%	17.9%	19.0%	17.3%
	14.1%	12.9%	30.0%	43.0%		15.4%	13.1%	31.1%	40.4%
	94	98	101	102		103	99	105	96
	10.8%	9.9%	23.0%	32.9%		2.8%	2.4%	5.6%	7.3%

Appendix

	D	C	B	A		D	C	B	A
	240	234	567	1,736					
	10,542	8,127	19,216	29,307		*36	**24	91	270
3 OR MORE TIMES A DAY	29.5%	25.7%	27.3%	29.1%	LESS THAN ONCE A WEEK	*2,144	**1,096	3,278	3,643
	15.7%	12.1%	28.6%	43.6%		*6.0%	**3.5%	4.7%	3.6%
	105	91	97	103		*21.1%	**10.8%	32.3%	35.9%
	4.4%	3.4%	8.1%	12.3%		*141	**81	109	85
	120	141	332	923		*0.9%	**0.5%	1.4%	1.5%
	4,345	4,206	11,872	13,855					
1 - 2 TIMES A DAY	12.2%	13.3%	16.9%	13.8%					
	12.7%	12.3%	34.6%	40.4%					
	85	93	117	96					
	1.8%	1.8%	5.0%	5.8%					
	*51	*52	150	394					
4 - 6 TIMES A WEEK	*1,359	*1,612	4,986	6,790					
	*3.8%	*5.1%	7.1%	6.7%					
	*9.2%	*10.9%	33.8%	46.0%					
	*61	*83	114	109					
	*0.6%	*0.7%	2.1%	2.8%					
	*58	*51	140	381					
	*1,917	*2,319	3,685	5,020					
1 - 3 TIMES A WEEK	*5.4%	*7.3%	5.2%	5.0%					
	*14.8%	*17.9%	28.5%	38.8%					
	*99	*135	96	92					
	*0.8%	*1.0%	1.5%	2.1%					