

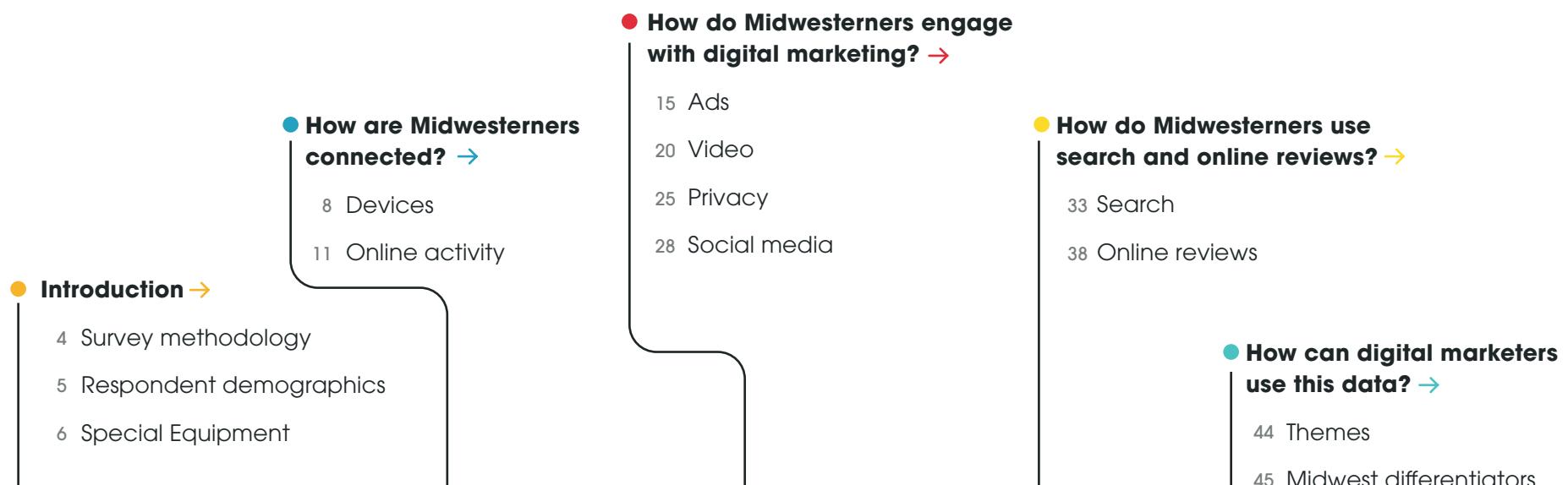
Volume II - 2022

DIGITAL STATE OF THE MIDWEST

How people in the Upper Midwest engage with digital marketing



CONTENTS



INTRODUCTION





SURVEY METHODOLOGY

In 2018, the first Digital State of the Midwest report was released. Now, four years later, it's back with new insights, trends, and unique ways to engage with audiences in the Upper Midwest.

Too often, marketers have to rely on nationwide trends or studies, but those don't always take into account regional and local differences. This report will help you better understand digital users in the Upper Midwest, so you can craft a marketing strategy that resonates with your target audience.



METHODOLOGY

We surveyed 1,060 people in the Upper Midwest, with statistically proportional segments of respondents from North Dakota, South Dakota, Nebraska, Minnesota, and Iowa.

Surveys were distributed through an enterprise research platform to a targeted randomized audience with equal distributions around location and age.

In addition to respondents from the five states above, we received statistically proportional responses from three age groups: 18–34-year-olds, 35–54-year-olds, and 55-year-olds and above. (Minors were excluded from the survey.)

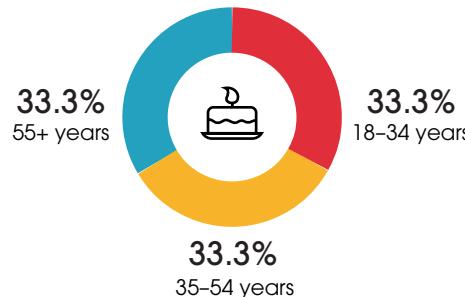
A 1,060-person sample of a population of 12.37 million people in this five-state region yields a confidence interval of 95% and a margin of error of $\pm 3\%$.



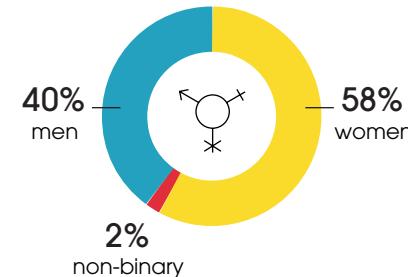


RESPONDENT DEMOGRAPHICS

Age



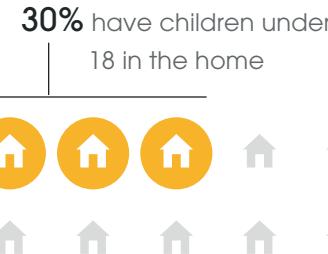
Gender



Education



Children



Household Income



How you'll see the data in the report

Throughout the report, our insights are based on statistically significant breakdowns of respondents. Some demographic categories you see here aren't shown throughout the rest of the report, since the number of respondents in some categories didn't reach the threshold of statistical significance.

To provide clear, consistent comparisons and insights between groups, we've grouped most audience segments into the following categories:

- ✓ **Gender:**
Men and women
- ✓ **Children at home:**
Those with children at home and those without children at home
- ✓ **Age:**
18-34, 35-54, and 55+
- ✓ **Avg. household income:**
\$0-\$50k, \$50-\$100k, \$100k+



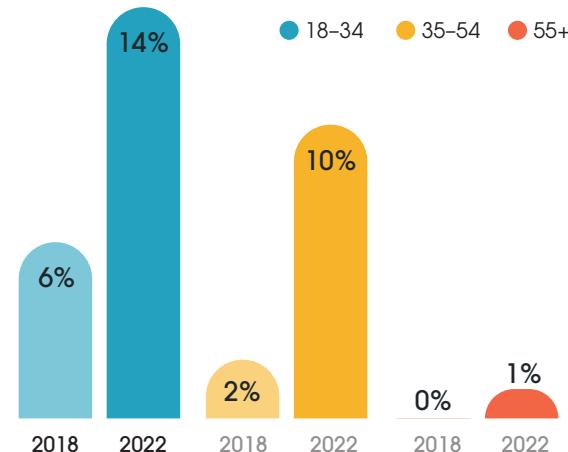
SPECIAL EQUIPMENT

Overall, 7% of respondents use special equipment—a **191% increase since 2018**.

The biggest usage is from those ages 18-34, accounting for 55% of those who use special equipment.

South Dakota has the highest percentage of respondents who use special equipment at 10.9%, compared to Minnesota at 5.8%.

Respondents by age group who said they used some sort of special equipment



What is special equipment?

Special equipment is used to help increase, maintain, or improve functional capabilities when using technology. These devices include:



SCREEN READERS



BRAILLE DEVICES



SCREEN MAGNIFICATION DEVICES



SPECIALIZED CONTROLLERS OR MOUSES

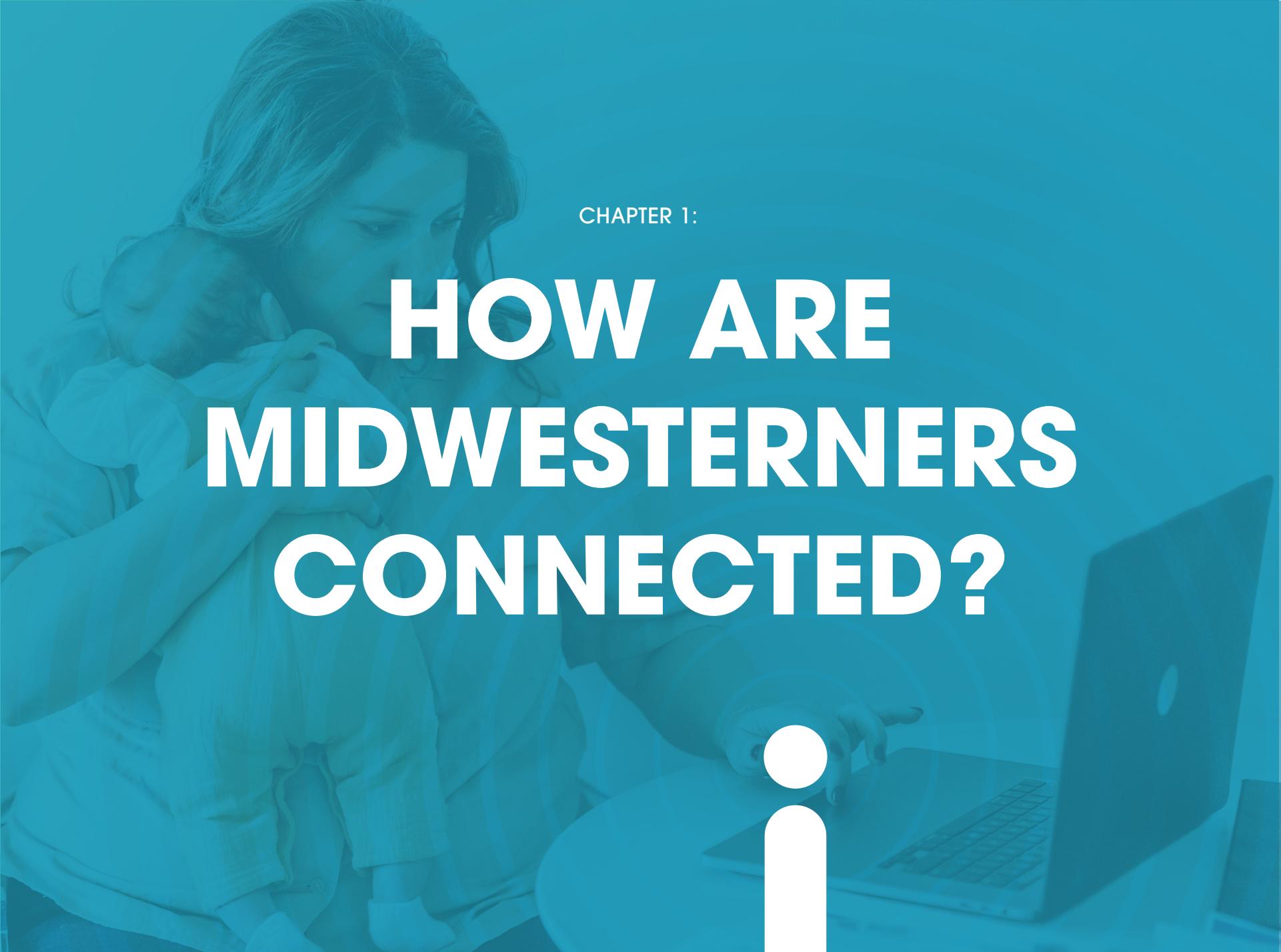


VOICE RECOGNITION SOFTWARE OR VOICE INPUT

Takeaway:

With more people using special equipment to access things online, ensure your website and marketing efforts are accessible to all.





CHAPTER 1:

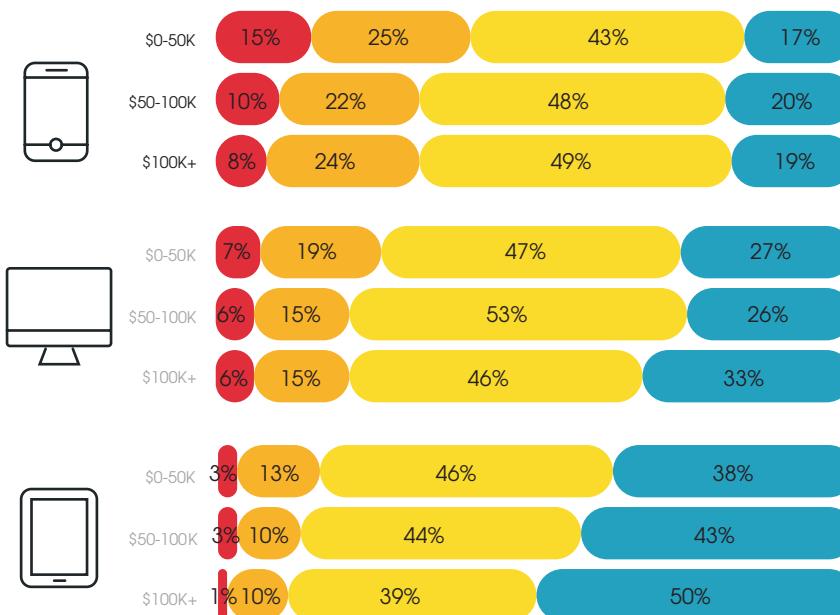
HOW ARE MIDWESTERNERS CONNECTED?



DEVICES

Learn which digital devices people in the Upper Midwest use most often

DEVICES USED OUTSIDE OF WORK



97% of people in the Upper Midwest spend at least one hour online outside of work across all devices. **This has remained consistent since 2018.**

Key findings:

- Men are about 10% more likely than women to use a desktop computer when online outside of work hours.
- Women are about 5% more likely than men to use a tablet when online outside of work hours.
- As average household income rises, the amount of personal time (weekday and weekend) spent online falls, regardless of device type.
- Regardless of device type, there were no statistically significant differences found between time spent online during weekdays versus weekends.



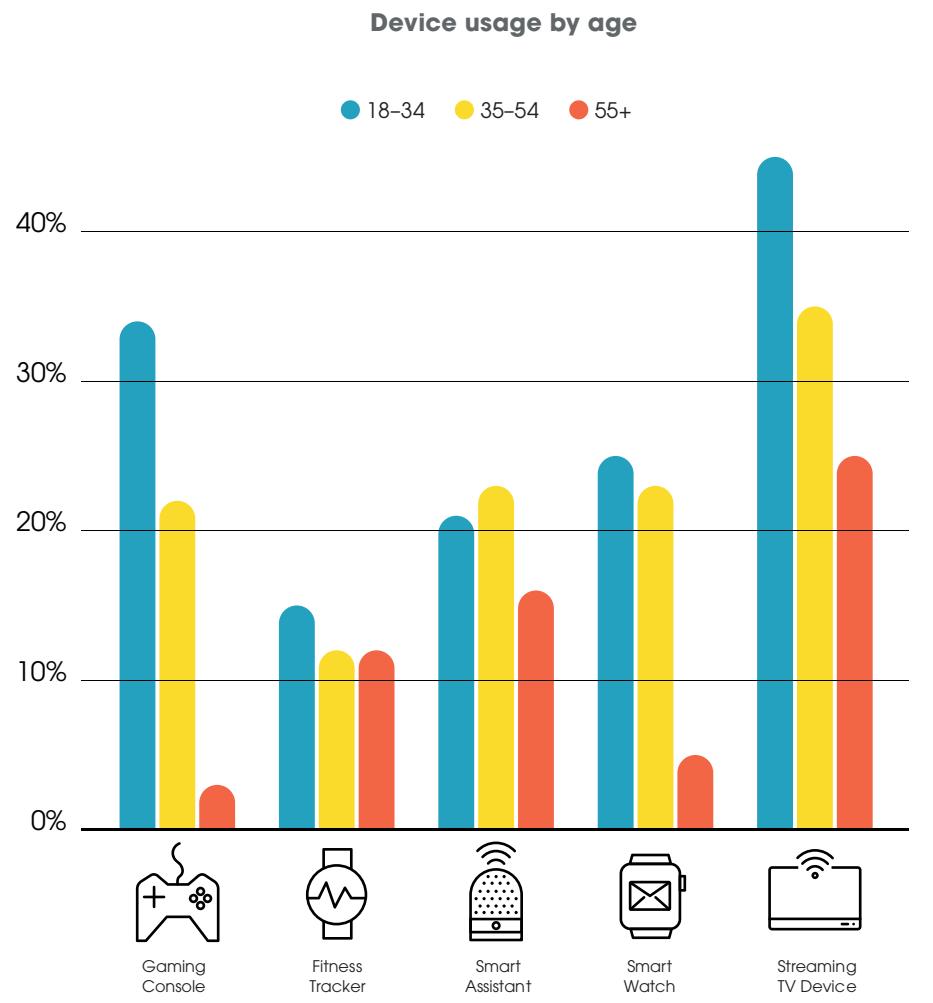
Consumers are always connected. Create a strategy that plays to different messaging or placement at different times throughout the day or week.

MORE CONNECTED ACROSS ALL DEVICES

It's not just computers or smartphones that consumers are connected to. There are a variety of devices and ways to interact or engage with your audience. If it makes sense for your business, are you engaging or advertising on these other devices?

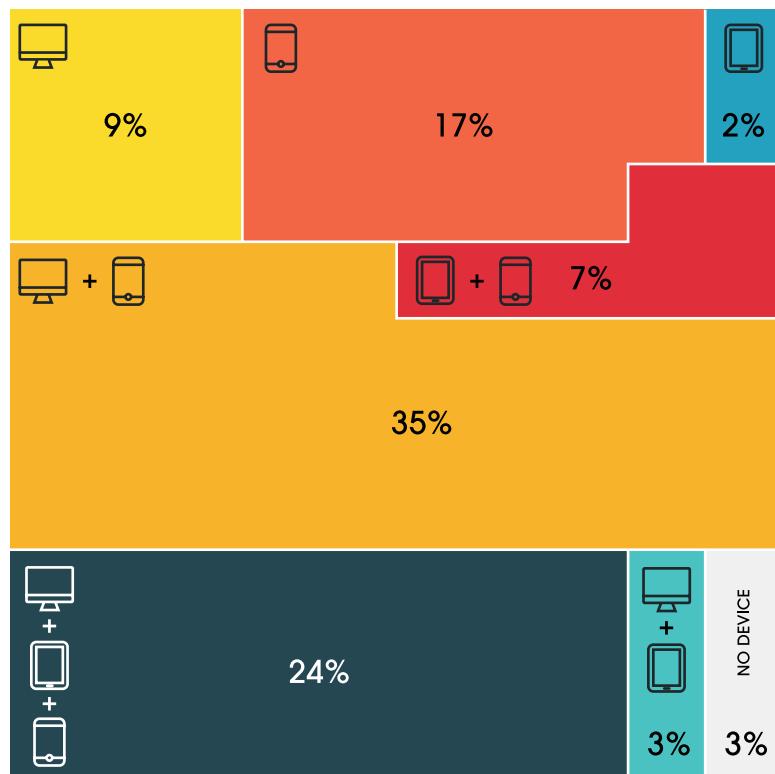
Key findings:

- **89% of respondents reported using streaming devices—double that in 2018.**
- Women are 10% more likely than men to report using a streaming device outside of work hours.
- Unsurprisingly, respondents are seven times more likely to use streaming devices outside of work than at work.
- Respondents were twice as likely to use a smartwatch outside of work.
- As average household income increases, so does the likelihood to use desktop computers at work.



MOBILE-FIRST USAGE

Multi-device usage across the midwest



Key findings:



- Of those who use devices, **89% use a mobile device**.
- 17% of respondents are “mobile-only” users—**a 55% increase since 2018**.



Takeaway:

Marketing and business strategies need to be thinking mobile-first, since mobile is the most likely way your customers will be engaging with your company. Are your website, email messaging, digital ads, and the way you are speaking to your audience aligned with a mobile-first mentality?

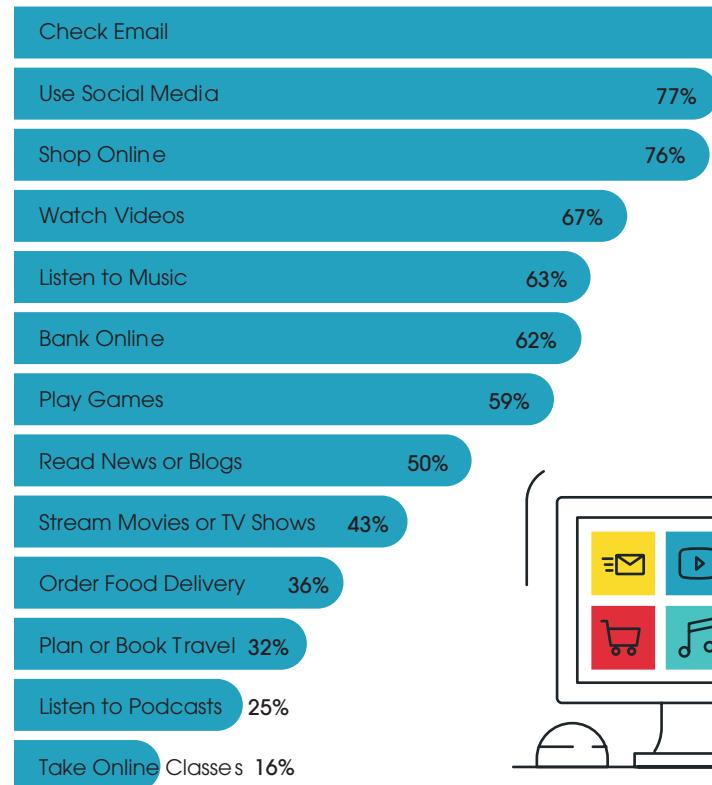


ONLINE ACTIVITY

See how people in the Upper Midwest are spending their time online

TOP ONLINE ACTIVITIES

The biggest change in online activity between 2018 and 2022 is that while some activities have increased, few have decreased. People are doing more online than ever before.



Key findings:

- Email is the top online activity for those in the Upper Midwest, underlining the importance of having an email strategy for your business.
- Nebraskans and South Dakotans are at least 5% more likely to take online classes than Midwesterners in other states.
- South Dakotans are the most likely to listen to music online (70%) compared to Midwesterners in other states (65% or less).
- Younger age groups are more than twice as likely to listen to music online (75% of ages 18–54) than those ages 55 years and older (35%).
- Those with the highest income levels are significantly more likely to read news or blogs online (65%) than those with the lowest income levels (30%).
- Those ages 35–54 are more likely to use social media (85%) than other age groups (80% of ages 18–34, 65% of ages 55+).
- Those with higher levels of education are more likely to listen to podcasts.

ONLINE ACTIVITY BY GENDER



Women are more Likely than men to...



stream movies or TV shows online



bank online



listen to music online



order food delivery online



shop online



use social media online



plan or book travel online

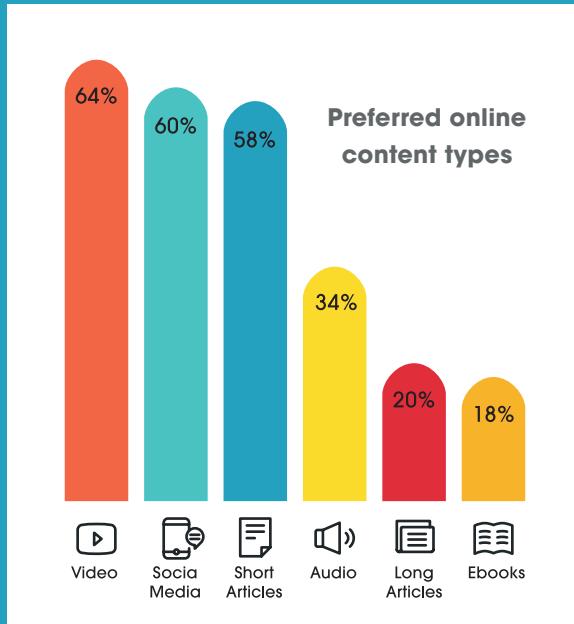
(women with children in home)

Takeaway:

All audience segments are different. The best practice is to understand the different personas of your target audience, then build marketing plans and strategies around where they spend their time online and what type of content they are most likely to consume through multiple touchpoints.

CONTENT TYPES

Video has become the most popular way to consume online content since 2018.



Key findings:

- Respondents are 7% more likely to consume video content online in 2022 than they were in 2018.
- Respondents with children at home are 13% more likely to consume video content than those without children at home.
- Those ages 18-34 are 15% less likely to enjoy short articles than other age groups. Overall, all respondents are less likely to enjoy short articles than they were in 2018.

Takeaway:

Creating content requires investment. Pay attention to how your audience wants to consume information and engage with your brand. It's also important to own and control your content. Make a plan for updating your website and sharing that content on other platforms and media channels.



Not sure where to start?

Simply sending an email to your customers showcasing blog or video content is a great way to cross-promote what you're creating.



Pro Tip:

Dive into your Google Analytics and overall platform metrics to see which types of content your audience currently engages with most often.

CHAPTER 2:

HOW DO MIDWESTERNERS ENGAGE WITH DIGITAL MARKETING?



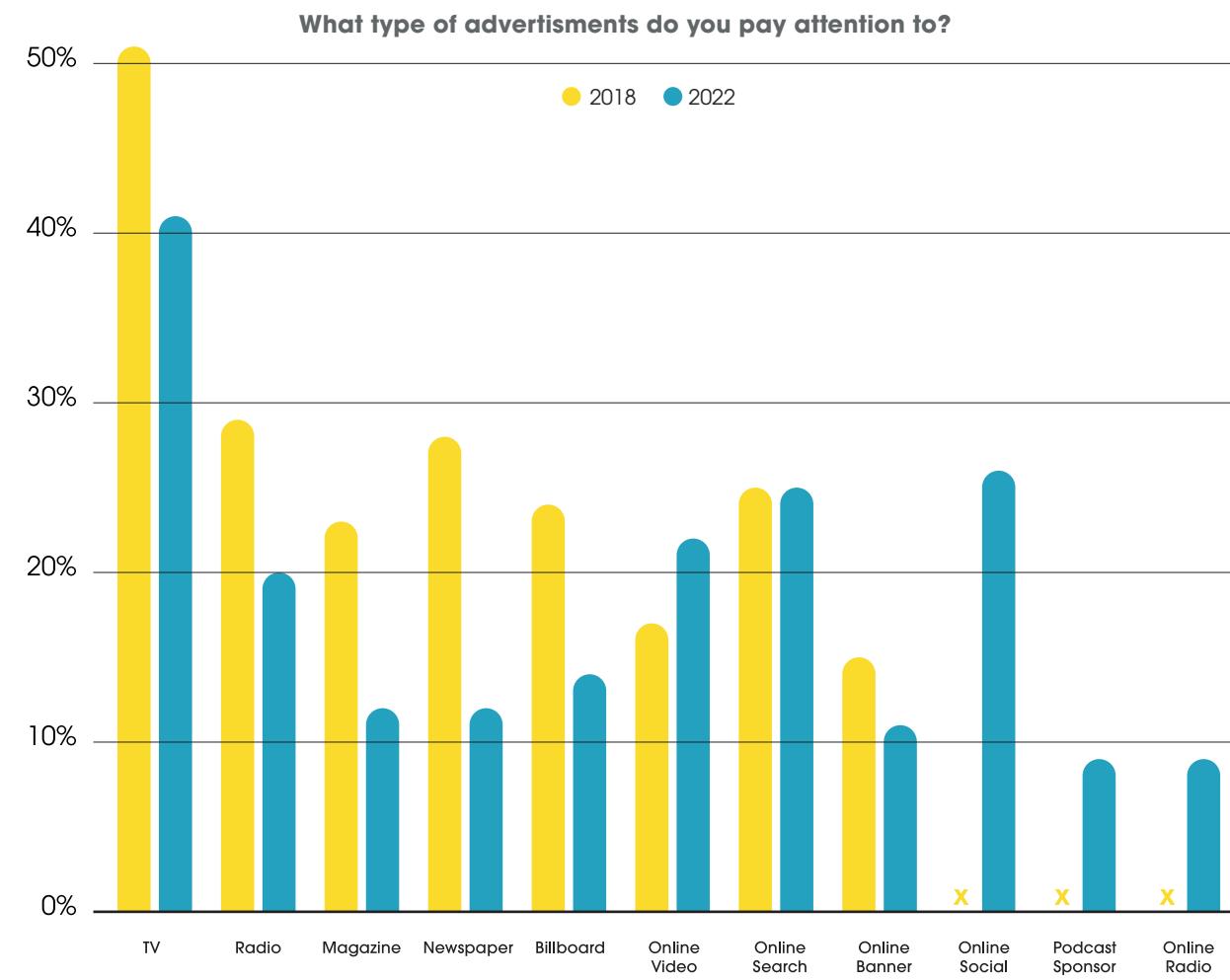


ADS

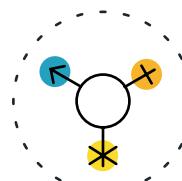
Explore the types of ads that capture Midwesterners' attention and inspire them to take action

AD TYPES

Overall, Midwesterners are still paying attention to digital ads, but the types of ads that stand out (regardless of channel) have changed since 2018. For example, Midwesterners are **paying 10% less attention to TV ads today than they did in 2018.**



The following key findings show some of the best ad types and channels to use to engage different audience segments:



GENDER

- Men are 9% more likely than women to pay attention to TV or radio ads.
- Women are 6% more likely than men to pay attention to online search ads.
- Women are 15% more likely than men to pay attention to social media ads.



AGE

- Those in younger age groups are more likely than older age groups to pay attention to online video ads, search ads, social media ads, and podcast sponsorships.
- Those in older age groups are more likely than younger age groups to pay attention to TV ads, magazine ads, and newspaper ads.



CHILDREN AT HOME

- Those with children at home are 7% more likely to pay attention to online video ads than those without children at home.
- Those with children at home are 12% more likely to pay attention to online search ads than those without children at home.
- Those with children at home are 13% more likely to pay attention to social media ads than those without children at home.



Takeaway:

People are still engaged with ads, but it's more important to make your message and creative meaningful and to align with the channel(s) your consumers are using and where they are in their purchase decision-making process. The more strategic touchpoints you can have across the multiple channels they engage with, the better your brand positioning will be.



GROWTH IN AUDIO CHANNELS

Online radio and podcasts are a great way to connect with your audience. 63% of Midwesterners listen to online radio, and 21% listen to podcasts.

Key findings:

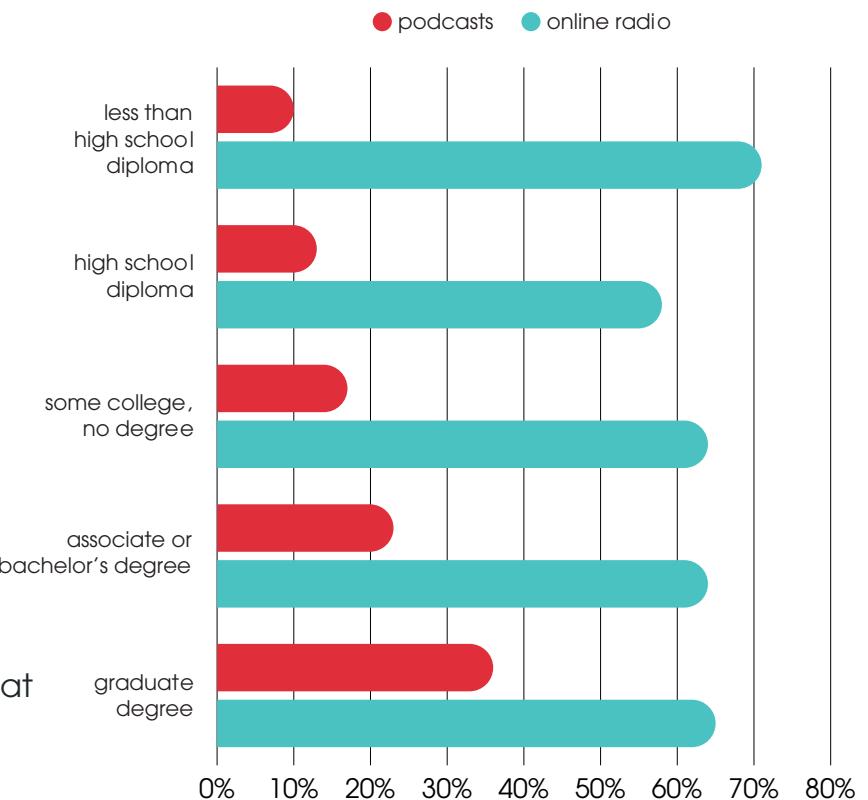
- Younger demographics are significantly more likely to use Spotify (67% of ages 18-34, 36% of ages 35-54) than older demographics (10% of ages 55+).
- Younger demographics were 13-15% more likely listen to podcasts and online radio than those ages 55+.
- About 30% of respondents listen to both podcasts and online radio.
- Those with higher levels of education are more likely to listen to podcasts.



Takeaway:

Depending on your target audience, online radio is a great way to build brand awareness and engage with them. If you're running online radio ads or podcast sponsorships, make sure the messaging and content aligns with who you are trying to reach.

Online audio listeners by education



HOW ADS IMPACT PURCHASING DECISIONS

Broadly, online ads still work in the Midwest. Half of respondents say online ads impact their purchasing decisions. This has remained consistent or slightly increased since 2018.

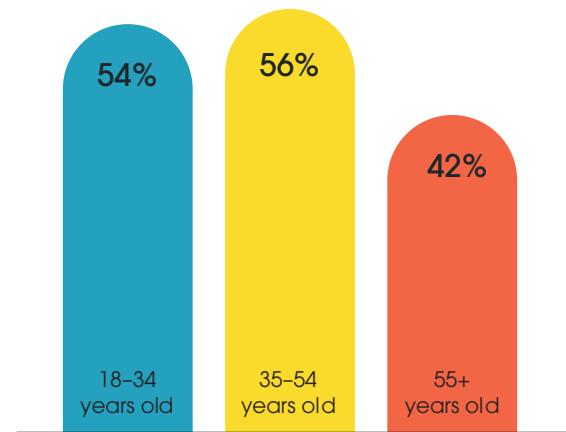


Younger age groups are **12% more likely** to make a purchase after seeing an online ad than those ages 55+.



Those with children at home are **16% more likely** to make a purchase after seeing an online ad than those without children at home.

Made purchase after viewing ad online



AD TYPES THAT IMPACT PURCHASING DECISIONS

The types of ads that drive purchases has changed since 2018. Social media ads are still one of the top ways to drive conversions and purchases across all age groups, while display ads have become less effective in driving direct purchases.

Key findings:

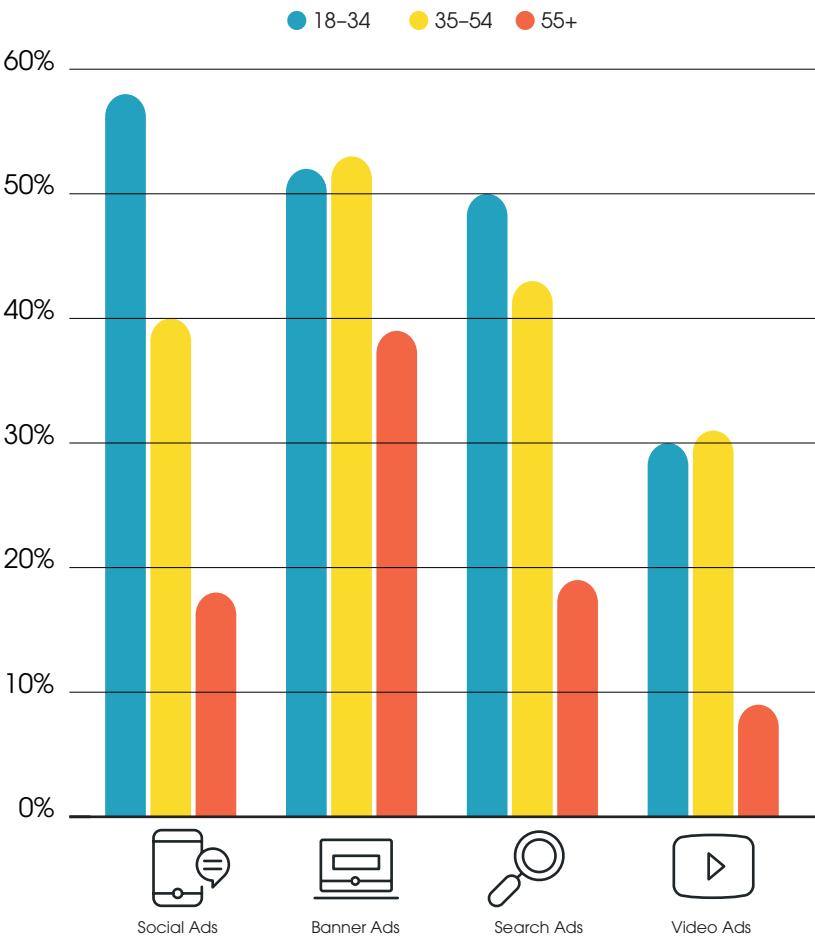
- **Display ads are 76% less effective in driving purchases for those ages 55+ than in 2018.**
- Across all ages, 48% of respondents said paid search ads were likely to lead to a purchase, up 21% from 2018.
- Social media is a great channel for engaging and driving younger demographics to make a purchase.
- Across all ages, those with children at home were more likely to make a purchase after seeing online ads than those without children at home.



Takeaway:

Not all ad placements are meant to drive purchases or conversions—some are used to create top-of-funnel awareness. Set clear expectations and goals for each ad type to ensure each channel is meeting your goals, like generating awareness or generating sales.

Ad types most likely to lead to a purchase by age





VIDEO

See how Midwesterners consume and engage with video content across different platforms and types of video

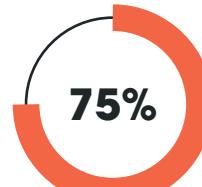
TV

People in the Upper Midwest still watch TV, but how they watch is changing. Most respondents said they watch TV using streaming services most of the time.

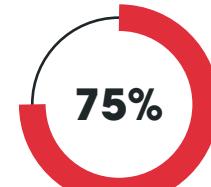
Key findings:



of those ages 18-34 watch live or recorded network/cable TV.

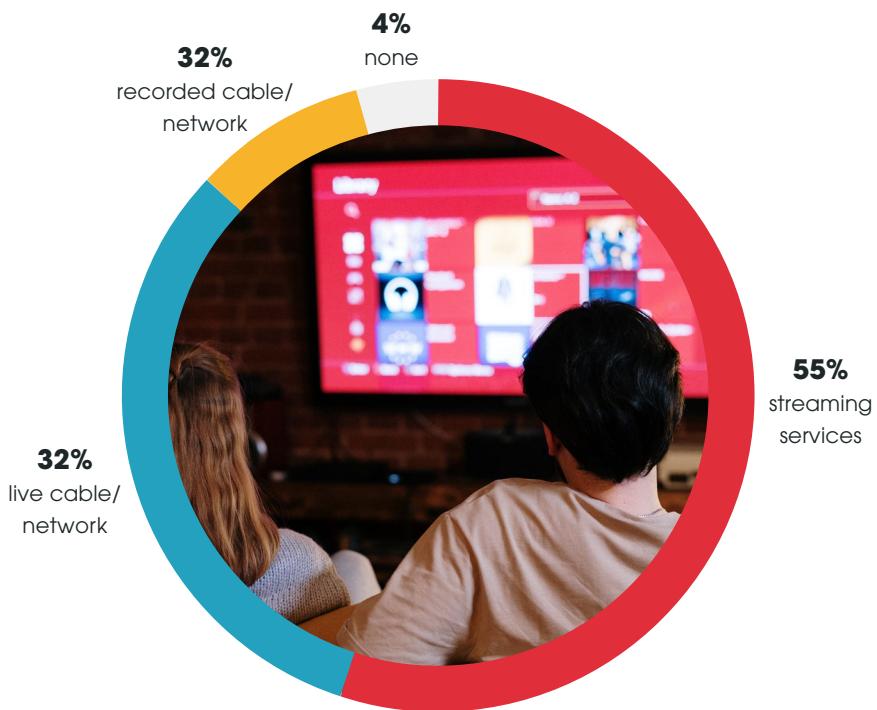


of those ages 55+ watch live or recorded network/cable TV.



of those with children in the home watch TV using streaming services.

Preferred way to watch TV



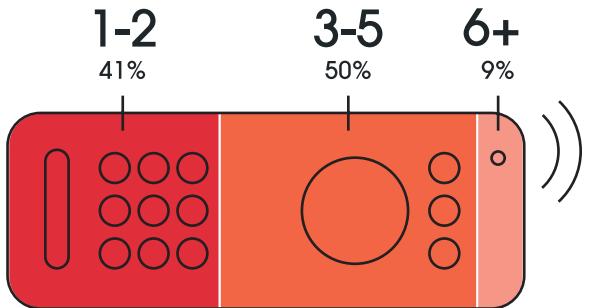
Takeaway:

Television is still an important part of your marketing mix, but you should understand your audience and know how they are watching TV.

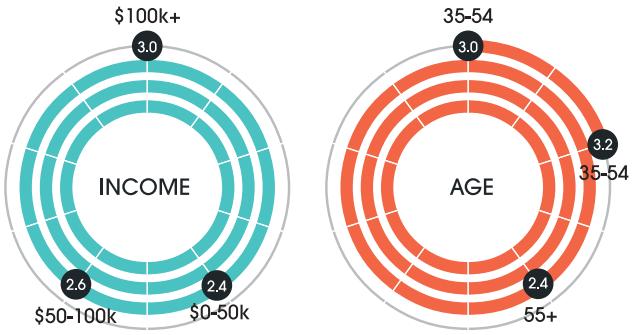
GROWTH IN STREAMING

Midwesterners have 2.6 streaming subscriptions on average, compared to the national average of 4 streaming subscriptions.

Of those who subscribe to at least one streaming service, many have multiple streaming subscriptions:



Average number of streaming services



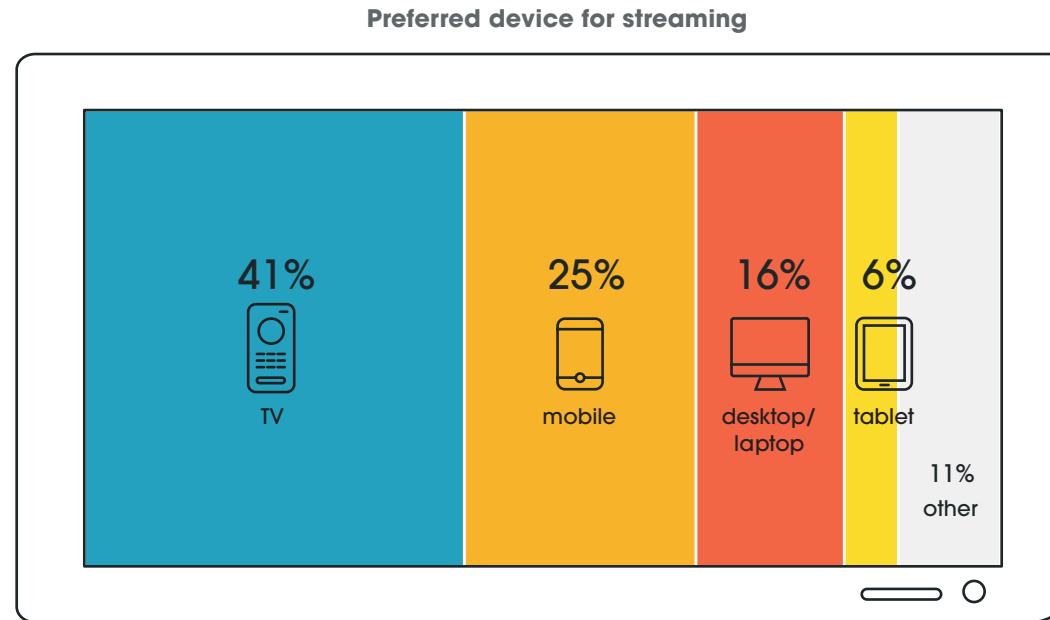
Key findings:

- 89% of those in the Upper Midwest use streaming services.
- Those ages 18-34 are twice as likely as those ages 55+ to watch TV using streaming services multiple times per week.



STREAMING DEVICES

75% of respondents use streaming services, but how they watch that entertainment varies. Of those, 41% prefer to watch streaming services on a TV set.



Key findings:

- Those ages 18–34 use streaming services equally on mobile devices and TVs.
- Most 35–54-year-olds prefer using streaming services on TVs, followed by mobile devices.
- Those ages 55+ prefer using streaming services on TVs, followed by desktop or laptop computers.

Takeaway: !

Connected TV is a great channel to connect with your audience. However, it's important to ensure the ad experience you're creating will look great across all device sizes, especially TVs.

OVERALL VIDEO CONSUMPTION

55% of all respondents watch video content daily, a 41% increase since 2018.

Key findings:

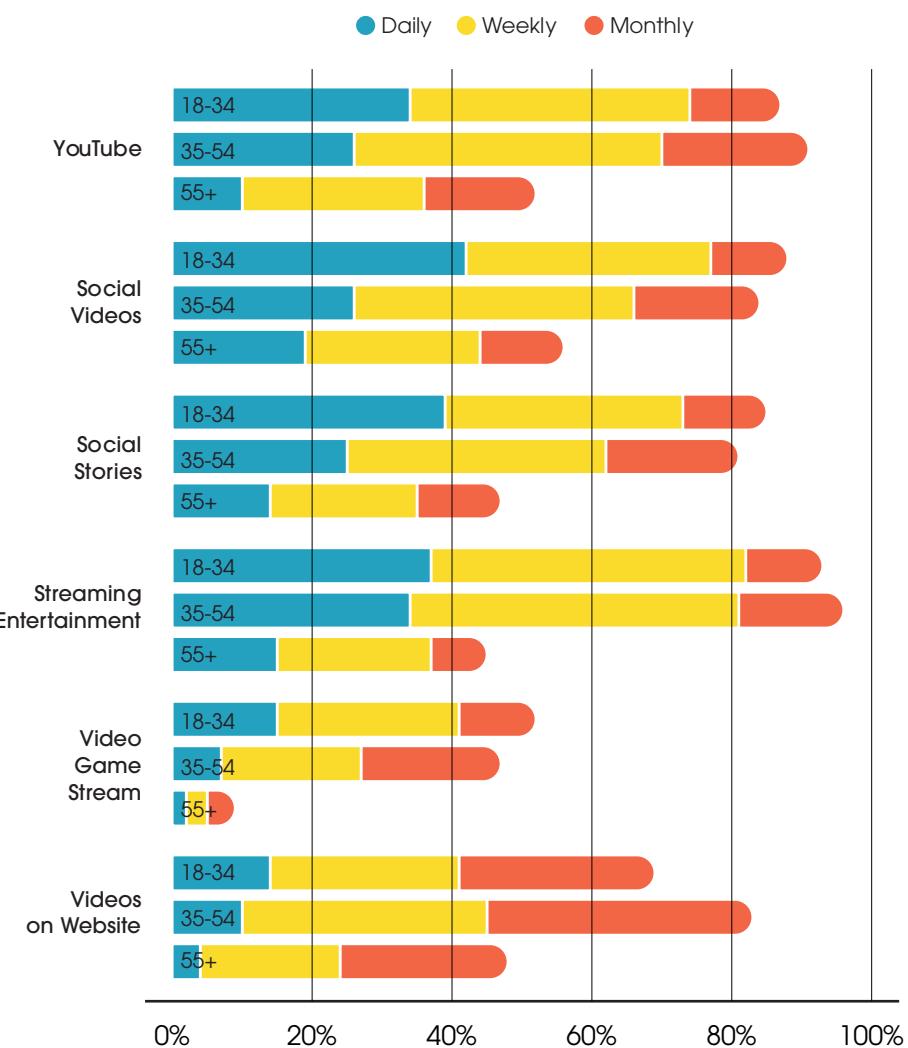
- Women are 5% more likely than men to watch videos or stories on social media daily.
- Those with higher incomes are less likely to watch videos and stories on social media daily than those with lower incomes.
- Those ages 18-34 are far more likely to watch video game streaming (69%) than those ages 55+ (11%).



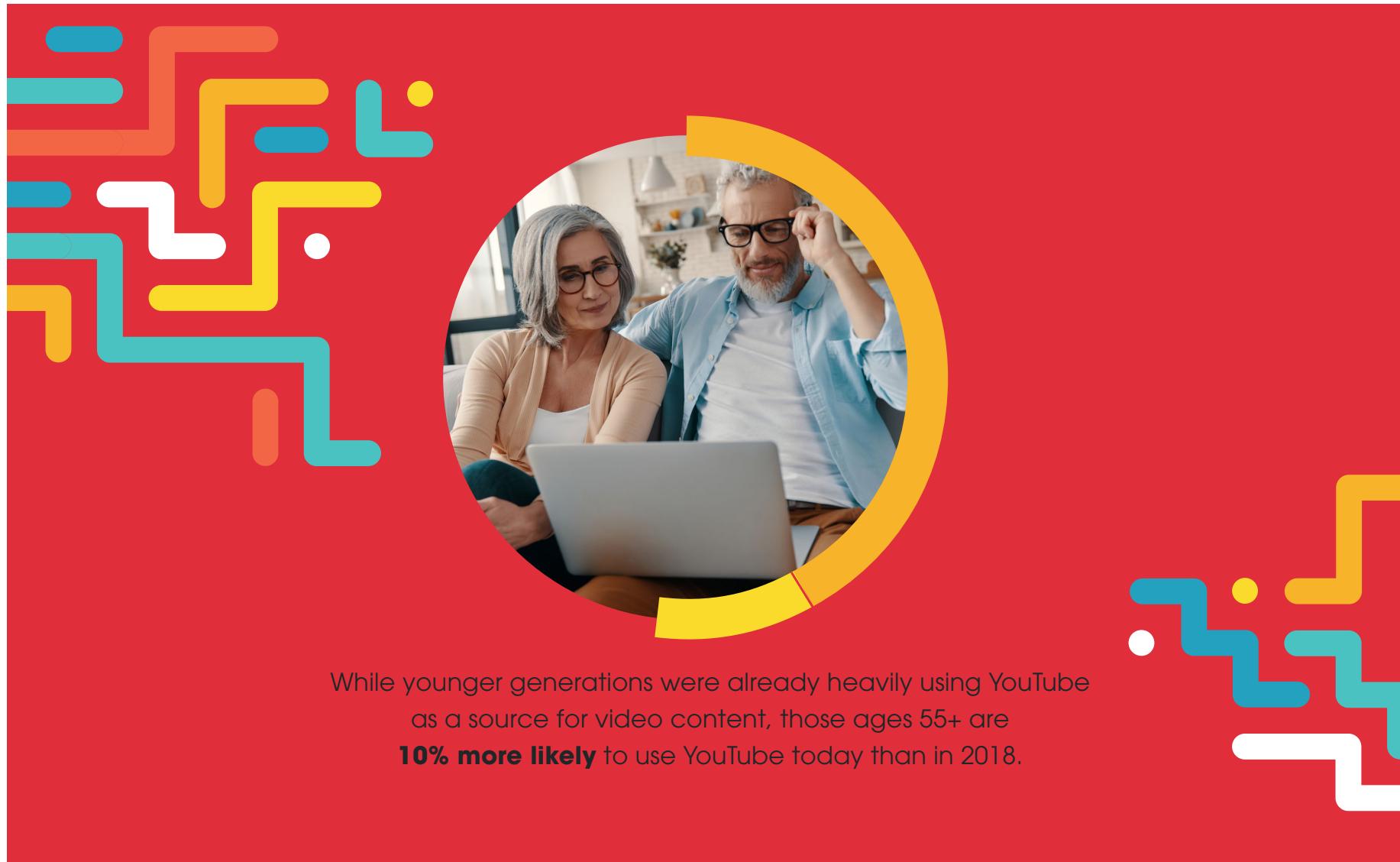
Takeaway:

Video content is a great way to engage with your audience, provide additional context or content around your products, and be a resource for customers. Understand where your audience is spending their time to determine which platforms you should build content for.

Preferred platform for streaming



YOUTUBE





PRIVACY

Learn how the changing privacy landscape is impacting consumer behavior and perceptions of digital marketing

PERCEPTIONS OF DIGITAL MARKETING

Respondents love the convenience and ease of doing things digitally, but their biggest concerns center around privacy.

While perceptions of privacy in digital marketing have changed, people's behavior hasn't changed drastically.



IMPACT OF PRIVACY CONCERN ON CONSUMER BEHAVIOR

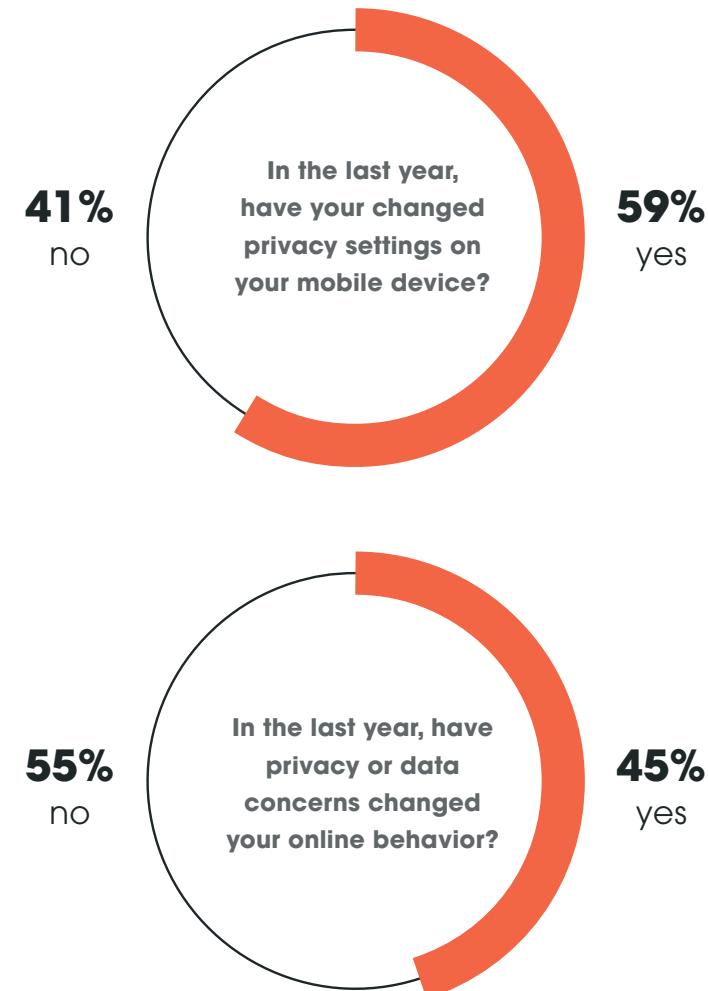
45% of respondents said that privacy concerns have changed their online behavior in some way, but some behaviors change more quickly than others.

Mobile phone privacy settings

59% of respondents have changed privacy settings on their mobile phones. This aligns with national trends in the wake of software updates and changes in mobile app tracking.

Key findings:

- Women were 7% more likely than men to change their mobile phone privacy settings.
- Younger age groups were 25–30% more likely to have changed privacy settings than those ages 55+.
- Those with children at home were 14% more likely to change their privacy settings than those without children at home.



AD BLOCKERS

29% of all respondents reported using an ad blocker, down from 38% in 2018.

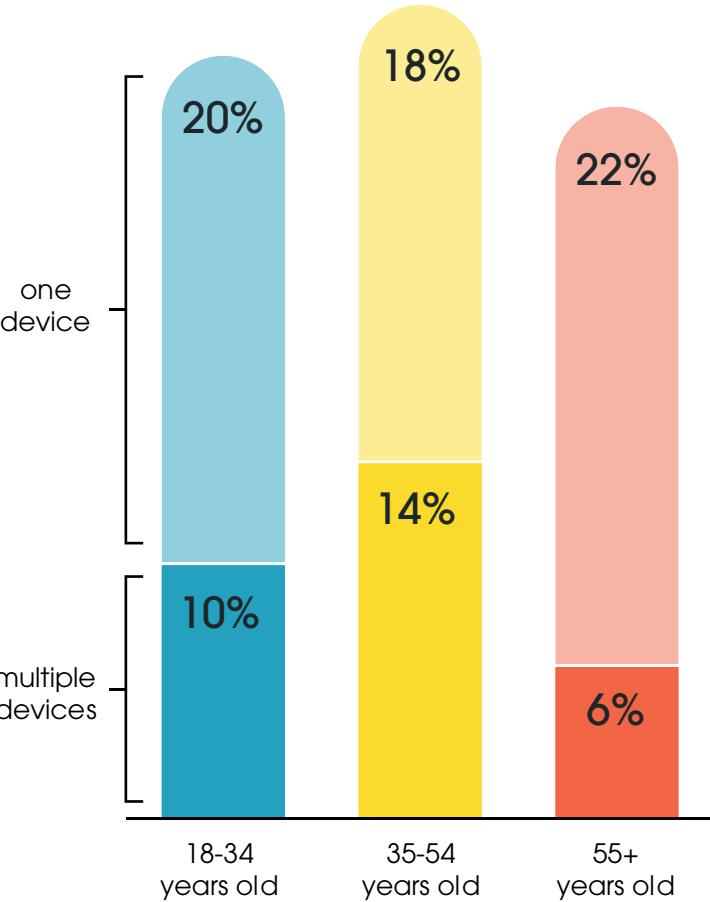
Key findings:

- Those ages 35-54 are slightly more likely to use ad blockers than other age groups.
- Those who had changed their mobile phone privacy settings were 10% more likely to use an ad blocker than those who hadn't changed their privacy settings.

Takeaway:

Midwesterners are making some changes to protect their privacy, but aren't drastically changing their behavior. It's important to continue using trusted channels for your digital marketing.

Ad blocker usage by age

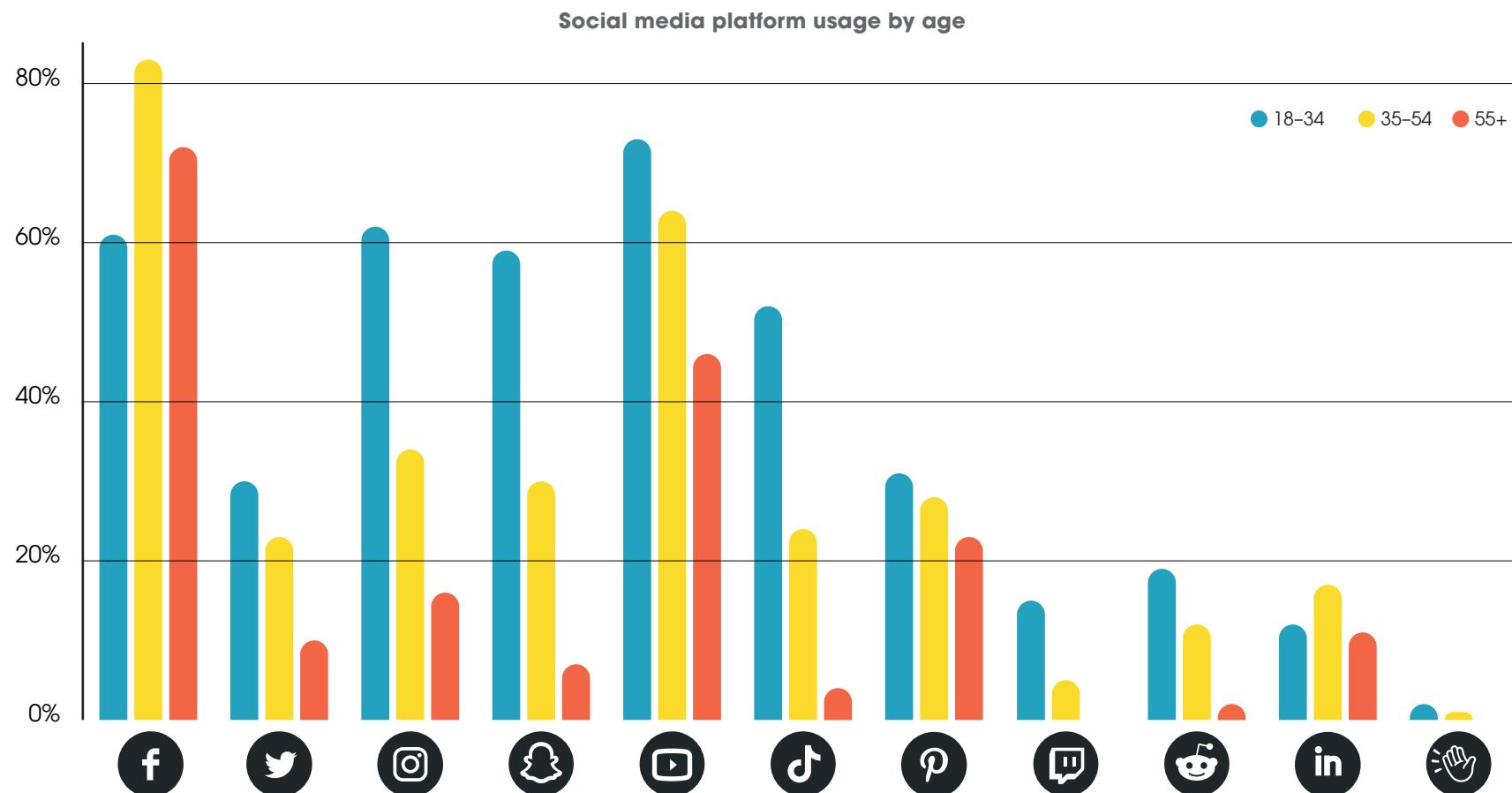




SOCIAL MEDIA

Learn how Midwesterners are using social media, which platforms they're using, and how they feel after spending time on social media

SOCIAL MEDIA PLATFORMS



Key findings:

- North and South Dakotans are 5% more likely to use Snapchat than those in other Upper Midwest states.
- TikTok is most popular among those ages 18–34 compared to other age groups, and usage of TikTok decreases among those with higher incomes.
- **Facebook is the most used platform by those ages 35-54 and 55+.**
- **YouTube is the most used platform by those ages 18-34.**
- Women are at least 15% more likely than men to use Facebook, Instagram, Snapchat, TikTok, and Pinterest.
- Those with children at home are more likely to use all social media platforms than those without children at home.



Takeaway:

Look at where your audience is spending their time. You may not need a presence on every social media platform, and you may need a different strategy for each social channel. Invest in creating quality content and connecting with your audience where they're already spending time.

SOCIAL MEDIA ENGAGEMENT

On average, 94% of Midwesterners use social media—an increase of 20% since 2018.

Key findings:

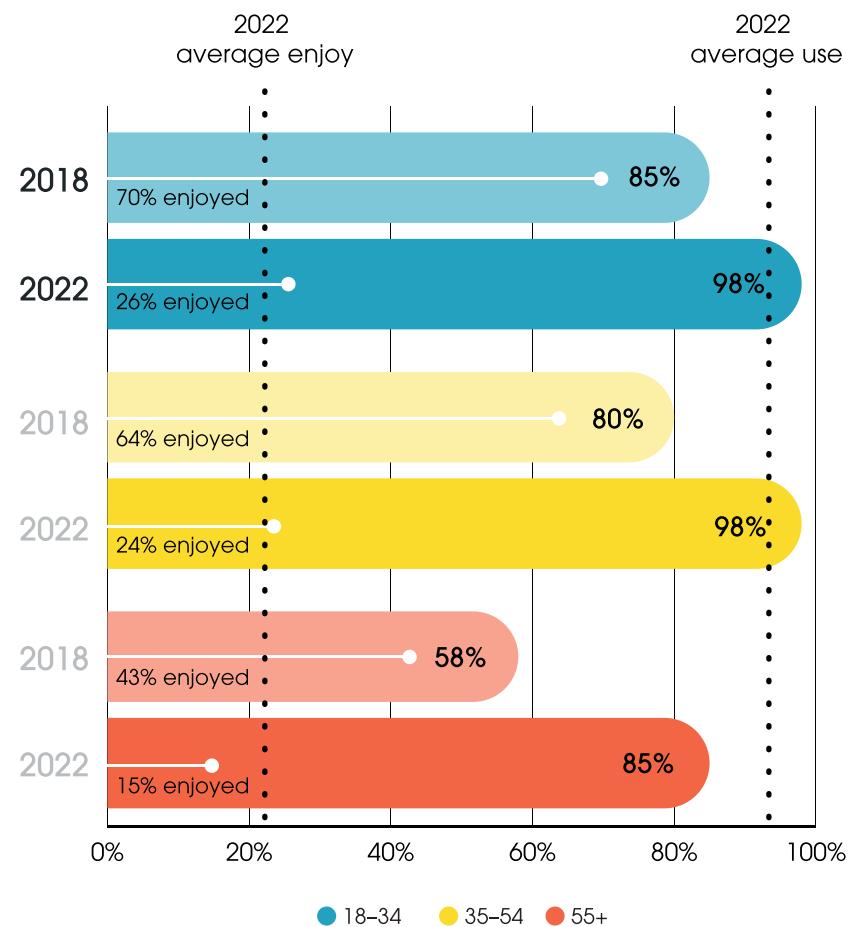
- Those with children at home report feeling “good or great” after using social media 42% more often than those without children at home.
- Men are more likely to report feeling “bad or awful” after using social media (16%) than women (11%).
- Those ages 55+ are 10% less likely to have “good or great” feelings after using social media than younger age groups.



Takeaway:

While more Midwesterners are using social media, not everyone has the same experience with it. Consider how the social media content you’re creating can add value as part of someone’s overall experience.

Social media usage vs. enjoyment by age





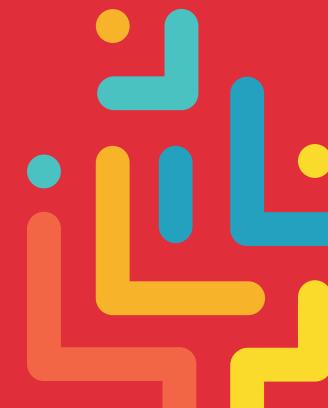
Key findings:

- In the past two years, more than a quarter of respondents have deleted or stopped using a social media platform.
- Those ages 18-34 were 20% more likely to stop using a social platform than those ages 55+.

Takeaway:

Social media channels are a key way to engage with your audience, but don't put all your effort into one channel. Find ways to engage with your customers outside of social media as well.

In the last two years, have you stopped using or deleted any of your social media accounts?



CHAPTER 3:

HOW DO MIDWESTERNERS USE SEARCH & ONLINE REVIEWS?





SEARCH

Learn how online search behavior impacts your business, how Midwesterners use search, and how you can use search to gain more customers

SEARCH ENGINE USAGE

94% of Midwesterners use search engines weekly.

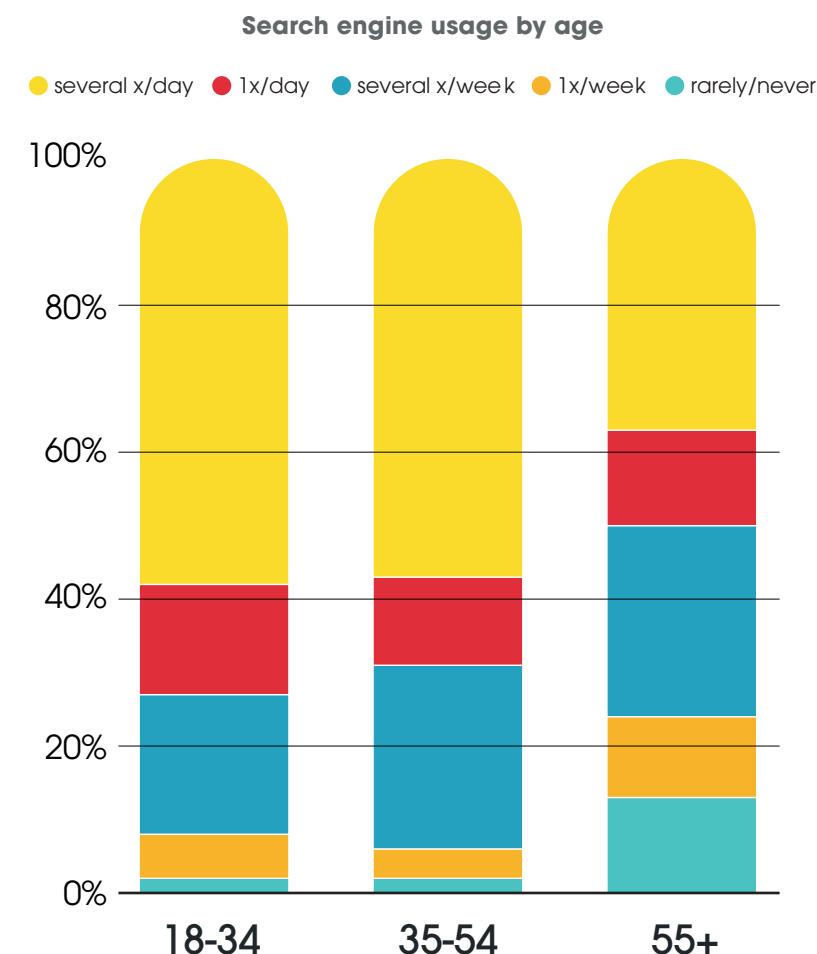
Key findings:

- 64% of Midwesterners use search at least once a day, a decrease of 11% since 2018.
- Those with children at home are 9% more likely to use search engines several times per day than those without children at home.



Takeaway:

Your marketing strategy should include a search strategy that allows your business to appear in organic, paid, and local search results.



SEARCH ENGINE PREFERENCE

Google's market share in the U.S. is 61.4%,
compared to 85.9% in the Midwest.

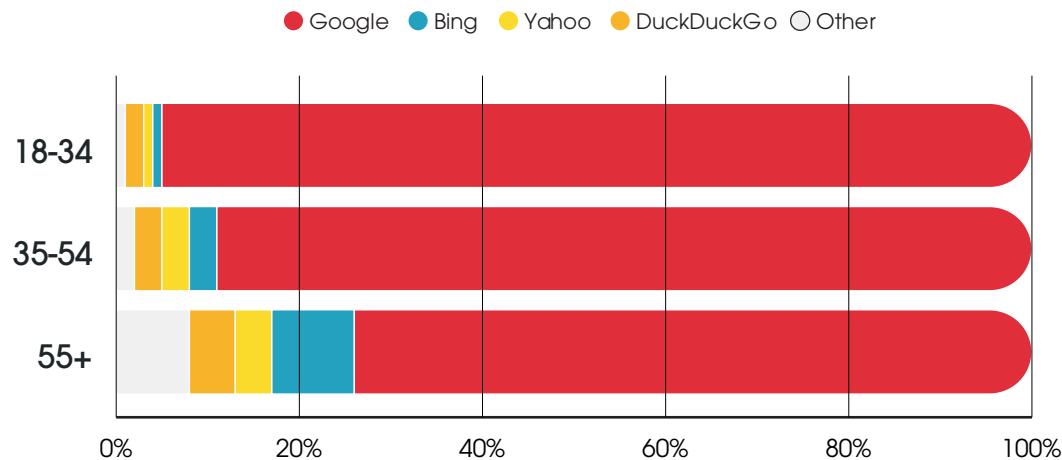
Bing and DuckDuckGo are the next two popular search engines, accounting for 4% each. Those ages 55+ make up the majority of search users on both Bing and DuckDuckGo.



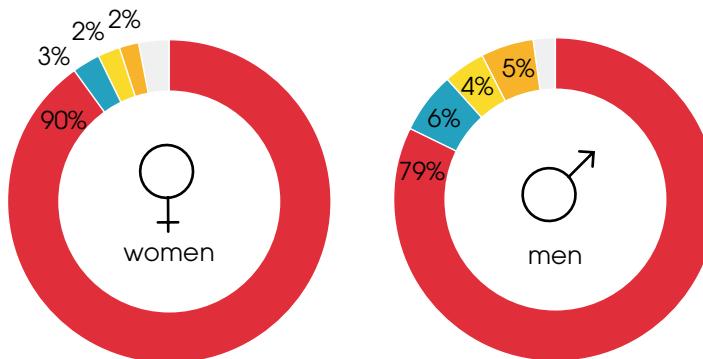
Takeaway:

If you run paid search ads, allocate most of the budget toward Google in this market. However, consider other search engines based on the demographics of your specific audience.

Search engine preference by age



Search engine preference by gender



VOICE SEARCH

43% of respondents use voice search, a 4% increase since 2018.

Those who use voice search use it several times per week. While the adoption rate hasn't changed significantly since 2018, use of voice search has remained consistent for existing users.



Takeaway:

Make sure your marketing strategy and website are set up to deliver a great experience for those using either text or voice search.



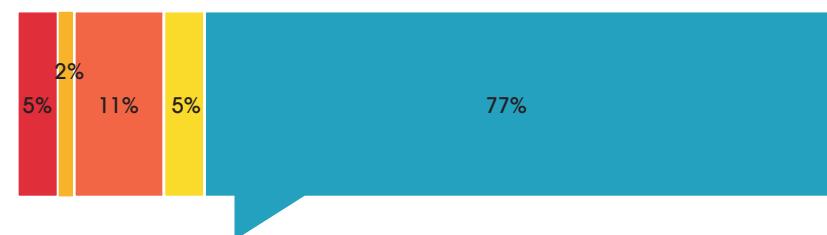
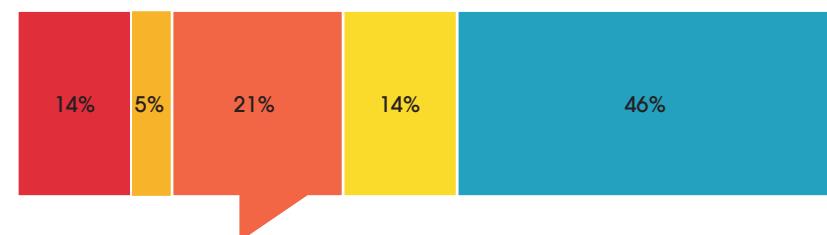
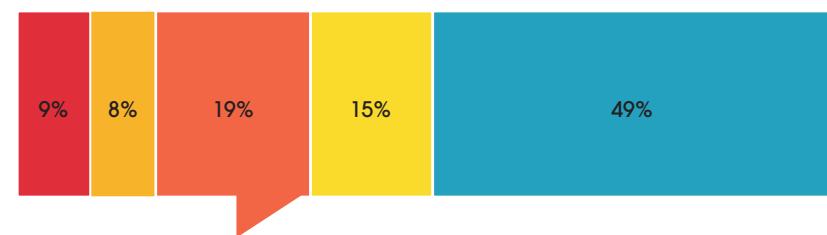
Mobile voice search usage by age

● multiple x/day ● 1x/day ● multiple x/week ● 1x/week ● rarely/never

18-34 9% 8% 19% 15% 49%

35-54 14% 5% 21% 14% 46%

55+ 5% 2% 11% 5% 77%



LOCAL SEARCH

Local searches happen when consumers are looking for businesses or services in their area. Having accurate business information for local search is important so you're providing useful information right away.

Key findings:

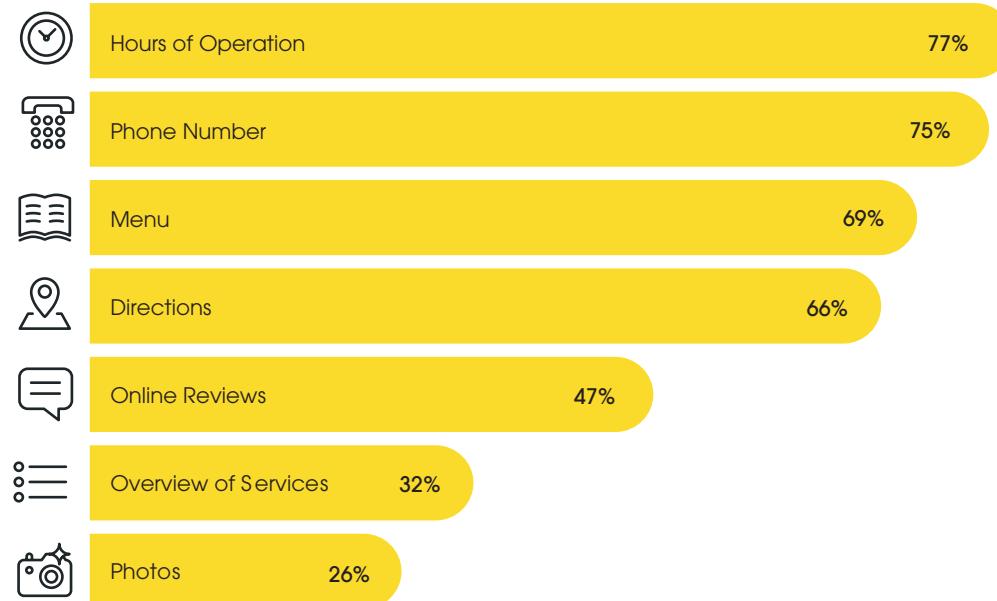
- Those with higher income levels are more likely to look for business information through local search.
- Those with children at home are more likely to use local search than those without children at home.
- Those ages 18–34 are more likely to use local search than those in older age groups.



Takeaway:

Make sure your Google Business Profile is claimed and updated for all of your business locations. The more accurate and complete your listing, the more likely your business will rank in local search results.

Local search uses



IMPACT OF LOCAL SEARCH ON IN-STORE VISITS



74% of people who conducted a local search for a business went on to visit or do business with the location, compared to the national average of 72%.



ONLINE REVIEWS

Explore how and why consumers leave online reviews, how they impact your business, and ways you can stand out

REASONS FOR REVIEWING

Not only are more people leaving online reviews today than in 2018, but online reviews also play a bigger role in purchase decision making today. Providing great service and asking for online reviews strategically can help advance your online review strategy.

Key findings:

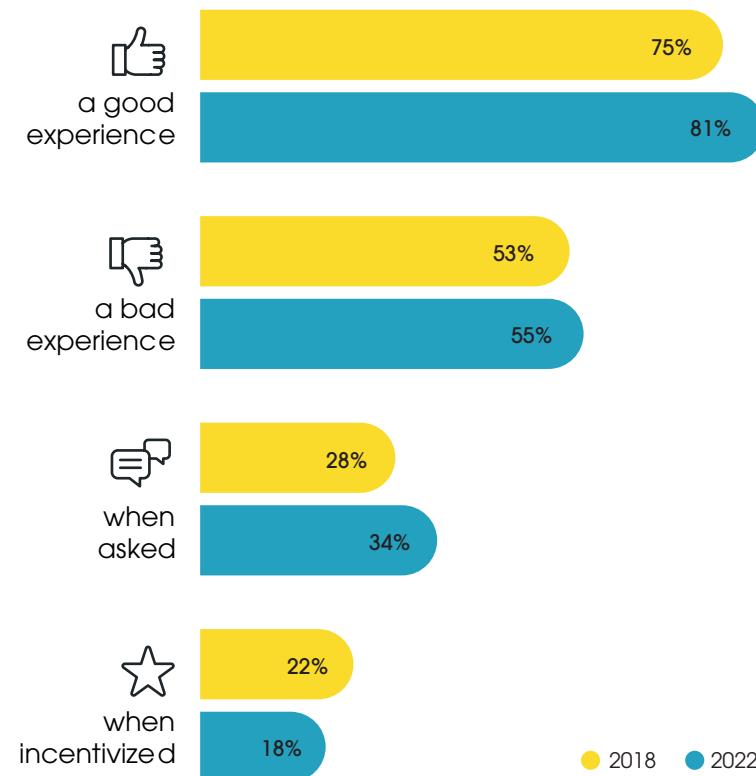
- People are **26% more likely to leave a review when they have a good experience** than for any other reason.
- **Men are 11% more likely** than women to leave reviews for good experiences, but both men and women are equally likely to leave reviews for bad experiences.
- **Younger demographics are 3-6% more likely** than those ages 55+ to leave a review when they have a good experience.



Takeaway:

Your business should have an online review generation strategy. Customers are generally willing to leave a review when prompted, so make sure asking for a review is part of your post-purchase customer experience.

Reasons for leaving online reviews



REVIEWERS

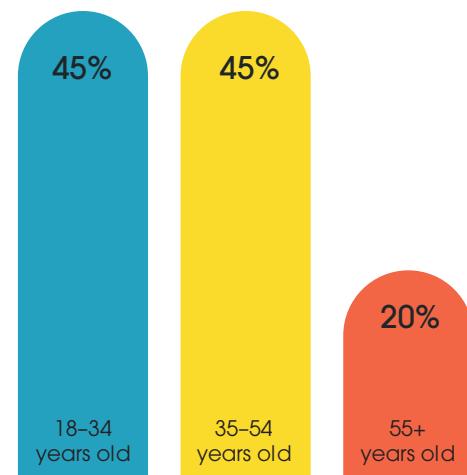
Online reviews have become more important in purchase decision making, but customers' likelihood to leave online reviews has remained the same since 2018.

Overall, 37% of Midwesterners are likely to leave online reviews.

Key findings:

- Those ages 18-54 are 25% more likely to leave online reviews than those ages 55+.
- Iowans are 5% less likely to leave reviews than those in any other Upper Midwest state.
- Women are 3% more likely than men to leave reviews.
- Those with children at home are more likely than those without children at home to leave reviews regardless of industry.

Likelihood of leaving online reviews by age



INDUSTRIES

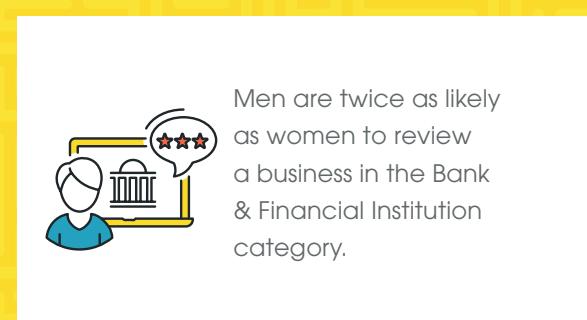
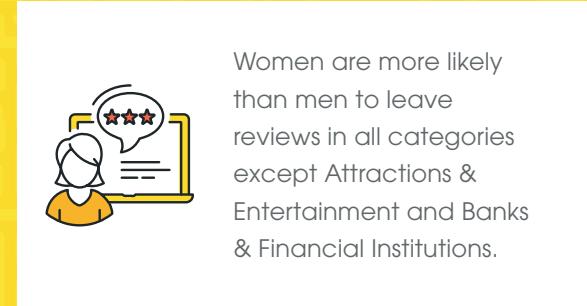
Likelihood of leaving online reviews by industry



Takeaway:

If your business is more transactional it's easier to get a review, but make sure you're asking for them. If your business is more of a one-time purchase or decision (like which bank to use or which hospital to go to), it's more difficult to get people to leave reviews. Businesses in these industries can stand out if they have a strong review strategy.

Key findings:



REVIEW PLATFORMS

Personal recommendations are by far the number one most trusted source for recommendations and reviews. Since these recommendations usually happen by word of mouth, these types of reviews are not usually left using platforms where businesses can see or respond, it's important to listen and see where other conversations are happening.

Key findings:

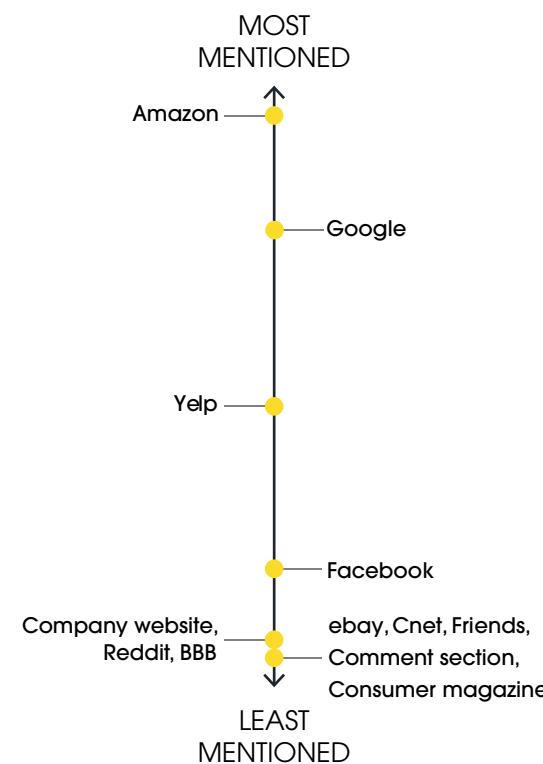
- People are nearly twice as likely to talk about a company than to a company.
- In the Midwest, Google and Amazon are the primary trusted online review sources.
- Yelp, while very popular throughout the U.S., has not gained as much popularity in the Midwest, with 10% of Midwesterners relying on Yelp reviews today compared to 13% in 2018.



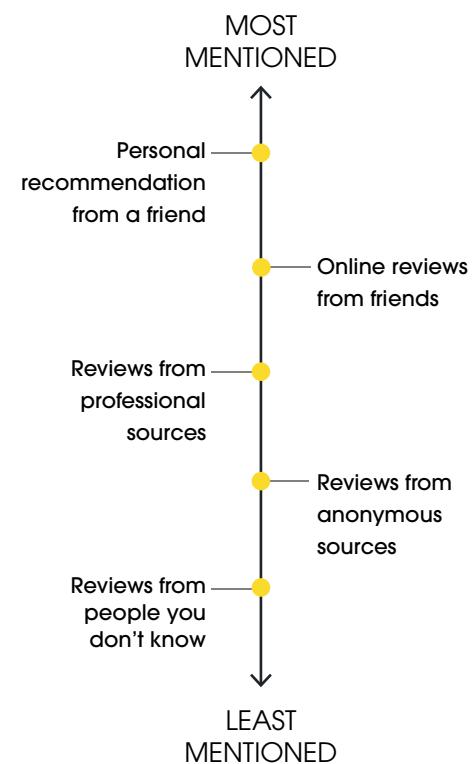
Takeaway:

As a business, do you have a way to identify and communicate with brand advocates who are talking about your products or services without mentioning you directly?

What online sources do you trust for reviews?



Whose reviews do you trust?



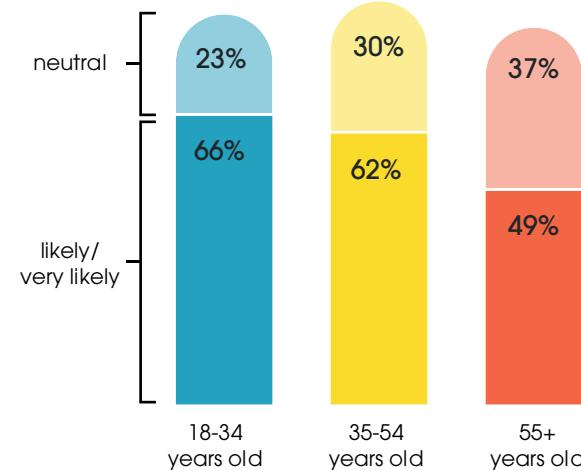
IMPACT OF REVIEWS ON PURCHASING DECISIONS

In general, people have become more likely to rely on online reviews for purchasing decisions. Demographics and lifestyle matter here, so it's important to know your audience.

Key findings:

- Those ages 18-34 are the most likely among all age groups to rely on reviews.
- Women are 18% more likely** than men to read reviews.
- Those with children at home are twice as likely to always read reviews than those without children at home.
- For 77% of respondents, **price** impacts the likelihood of reading reviews before purchasing.

Likelihood of online reviews impacting purchasing by age



Influence of price on the importance of reviews

Does the price of a product/
service impact if you
read online reviews
before purchasing?

YES
77%



Takeaway:

In 2022, respondents were more likely to be influenced by reviews in their purchasing decisions than they were in 2018. Do you have a pulse on your company's online reputation or an online review generation strategy?



CONCLUSION:

HOW CAN DIGITAL MARKETERS USE THIS DATA?





THEMES FOR EFFECTIVE MARKETING STRATEGIES

Having data about your Upper Midwest customers is great, but it can be overwhelming to put it all to use. We've identified four main themes and takeaways from our 2022 Digital State of the Midwest report.



Mobile-first

89% of respondents use a mobile device, and those who only use mobile have increased by 55% since 2018. Your marketing strategies should be centered around the mobile experience, then expand to other channels and devices.

Content consumption

A few key channels and content types stood out in 2022 compared to our 2018 study. Video and audio continue to rise in Midwesterners' content consumption.



Younger age groups are listening to online radio at a much higher rate than those ages 55+. This is a great channel to leverage when driving awareness with audience segments.



The primary way Midwesterners watch TV is through **streaming services**. Having connected TV as part of your overall marketing strategy allows your business to connect with potential customers through a channel they're spending more time with.



55% of respondents watch video content daily—a 41% increase since 2018. One of the biggest drivers of video consumption is YouTube. All age groups showed increased YouTube consumption, including a 10% increase in YouTube engagement among those ages 55+ since 2018.



WHAT MAKES THE UPPER MIDWEST UNIQUE?

Here are a few takeaways that may make marketing to audiences in the Upper Midwest unique compared to other audience segments throughout the U.S.



Platforms

- **Google is the preferred search engine for 86% of Midwesterners**, compared to 64% nationally.
- 74% of people who performed a local search for a business went on to visit or do business with the location compared to the national average of 72%.
- Yelp, while very popular throughout the U.S., has not gained as much popularity in the Midwest, with **10% of Midwesterners relying on Yelp** reviews today compared to 13% in 2018.
- In the Midwest, Google and Amazon are the primary trusted online review sources, this has remained constant since 2018.



Online activity and content

- Nebraskans and South Dakotans are at least **5% more likely to take online classes** than Midwesterners in other states.
- Minnesotans are 3-9% less likely to use a smartphone regularly outside of work compared to Midwesterners in other states.
- Online radio and podcasts are great ways to connect with your audience. 18% of Midwesterners listen to online radio and 25% listen to podcasts.
- **South Dakotans are more likely to use Spotify and listen to podcasts** than those in other Upper Midwest states.
- South Dakotans are less likely to listen to iHeartRadio than those in other Upper Midwest states.
- Midwesterners have **2.6 streaming subscriptions on average**, compared to the national average of 4 streaming subscriptions.



Check back for more marketing trends and
Midwest consumer insights. We will
be releasing more content in 2022!

LET'S GO!

