



Rural Publishers

Rural Media Habits Survey 2018



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01

INTRODUCTION



Background

Four major publishers have collaborated to produce independent, up-to-date data on farmers' media consumption habits.

Rural publishers want to better understand the use of different media (particularly print and online, including social media) and the relationship between these, within its core audience of commercial farmers (including livestock, crop and horticulture).

In the past rural publishers have used a publication omnibus survey for this type of information however there were perceptions of a biased sample (including a high number life-stylers rather than commercial farm operators) and an onerous questionnaire.

This had likely had an impact on sample quality and thus a lack of perceived value from title penetration rankings therefore the consideration on a customised research approach.





Objectives

1. Obtain a representative sample of commercial farmers.
2. Understand media consumption habits among farmers, including online, social media, print, mobile, TV and radio.
3. Understand the relationship between print and other media.
4. Understand how media consumption influences purchase decisions on farms .

Methodology

Obtaining a broad and representative sample of the publishers' current readership across New Zealand was undertaken using a range of strategies outlined as follows:

- » Promotion of the survey via a print ad in various publications nationwide.
- » Contact via a list supplied by one of the rural publishers (entrants from a previous competition).
- » Participants given the option to complete the survey online or provide their details and be called at their convenience.

All participants incentivised with entry into a prize draw (3 x \$500 Visa Prezzy cards).

Participants were screened at the start of the survey. All participants must:

- » Exclude all life-style properties
- » Be over 25 ha in size (if Horticulture), over 50 ha (if livestock)
- » Earn over \$150k annual revenue (if livestock).

The survey has been modified from previous versions to develop a shorter and more direct survey targeting the specific objectives as previously outlined.

After data-cleaning a total of 820 surveys were completed nationwide.



Executive Summary

Despite an increase in internet use rural newspapers are still accessed at least weekly by 88% of those surveyed.

Printed rural newspapers have the biggest impact on farm purchase decisions, with 82% placing it in the top three (38% ranked it as most influential).

Rural magazines and newspapers have advertising that farmers pay attention to, while advertising on internet, TV and radio appear less relevant.

- » A third say they have made a purchase after reading rural publications.
- » Tractors, motorbikes, vet products and agrichemicals stand out as items most frequently purchased.

The level of influence of rural print on farm decision-making is significant, particularly if targeted to their business (ie rural).

02

KEY FINDINGS



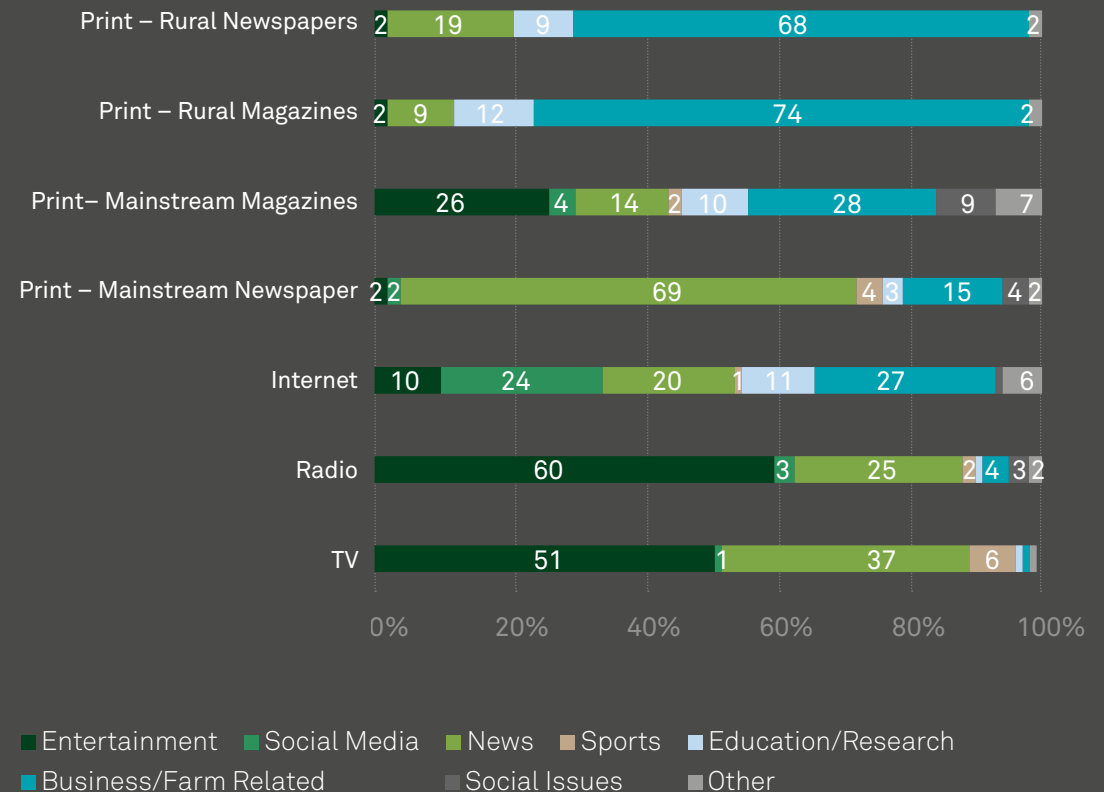
Purpose of Media Use

Rural newspapers and magazines are primarily for work-related purposes.

Radio and TV are primarily used for entertainment while printed mainstream newspapers are used mainly for news.

Please select the most common purpose for your consumption of each of the following media types?

n=Those who read each at least every 2-3 days



Influence of Media

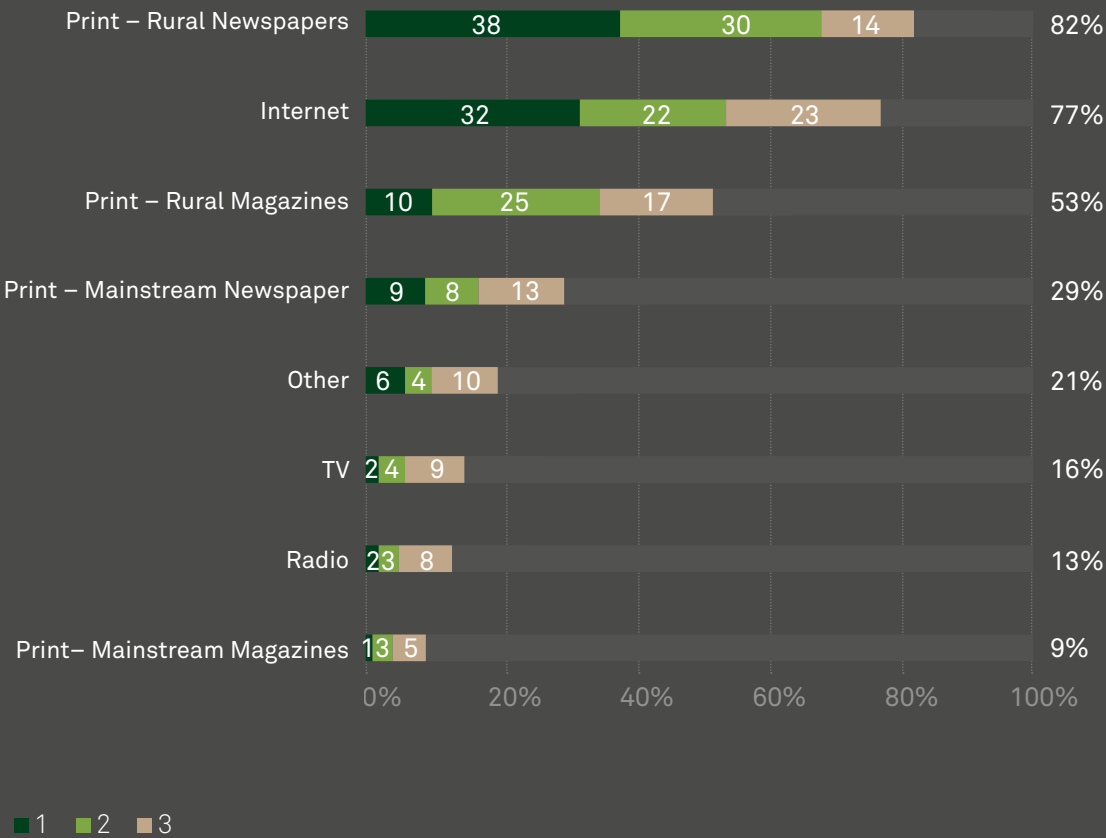
Printed rural newspapers have the biggest impact on farm purchase decisions, with 82% placing it in the top three (38% ranked it as most influential).

Rural magazines sit behind the internet, but well above TV and radio.

The level of influence of Rural print on farm decision-making is significant, particularly if targeted to their business.

From the list below please rank the top 3 that have influenced your purchase decisions on the farm?

n=Those who read each at least every 2-3 days



Role of Information from Favoured Media

Rural print (either newspaper or magazines) is strongest at providing farm-related information/research/data or product related information (although the internet is even more associated with the latter).

How has information from the top-ranked influential publication (from above) assisted your decision making on the farm?

	Rural Newspapers	Rural Magazines	Internet	Mainstream Newspaper	Mainstream Magazines*	TV*	Radio*	Other
N=Ranked #1	312	81	259	71	12	15	13	53
Farm specific information / research / data	28%	24%	19%	24%	32%	27%	45%	24%
Product related info (source, price, alternatives)	25%	22%	34%	30%	25%	13%	15%	25%
New ideas / broadens knowledge / keeps me up to date	14%	16%	14%	14%	8%	27%	8%	8%
Confidence / confirmation of decision	4%	4%	0%	4%	0%	0%	8%	10%
Compare experiences / learn from others	3%	5%	5%	0%	8%	0%	8%	15%
Easy / convenient / quick	2%	2%	7%	1%	0%	0%	0%	0%
Personal preference	2%	0%	3%	1%	0%	0%	0%	0%
Other	6%	7%	5%	8%	0%	13%	8%	8%
Not specified / don't know / doesn't influence	15%	14%	14%	18%	25%	27%	15%	25%

*Sample size too small for comparisons

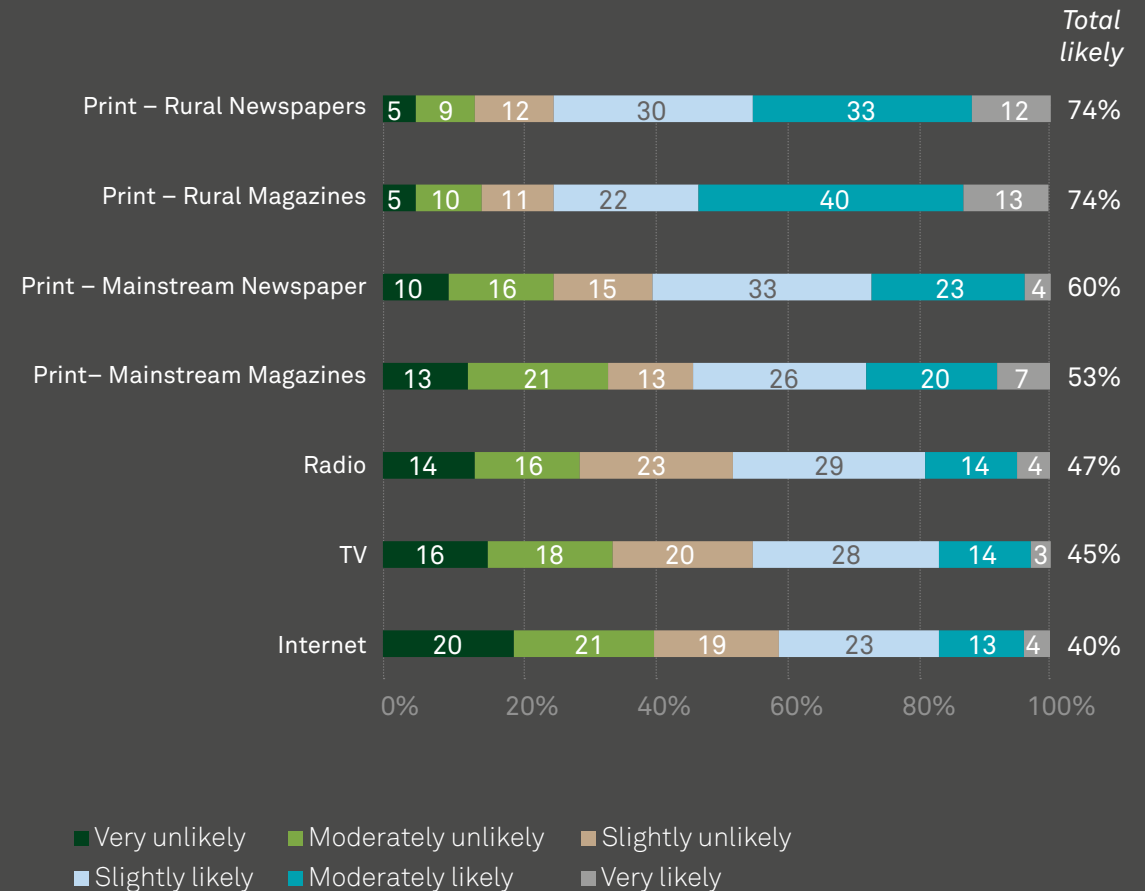
Advertising in Media

Rural newspapers and magazines contain advertising farmers are most likely to pay attention to.

Advertising on the internet, TV and radio appear less relevant.

Please select how likely you are to pay attention to advertising in each of the following:

n=Those who read each at least weekly



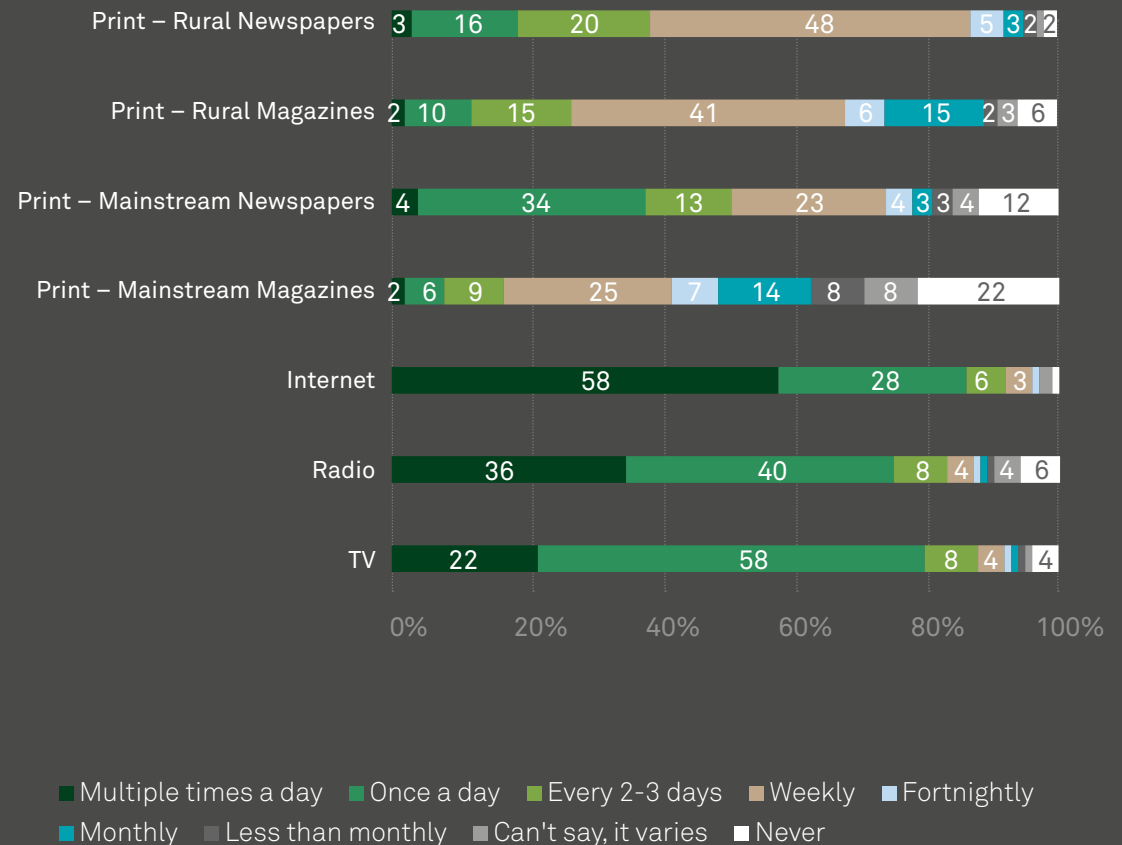
Media Access

Rural print is read on a weekly or monthly basis in-line with its publishing frequency.

Rural newspapers are accessed at least weekly by 88% of respondents.

The Internet is most likely to be used multiple times a day, with Radio and TV just behind (more predominantly accessed once a day).

On average how often do you access each of the following media types? n=820



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RURAL PUBLICATION USE



Use of Rural Publications

Print is very much the preferred format (79% prefer this), particularly for those aged 50+ (88%).

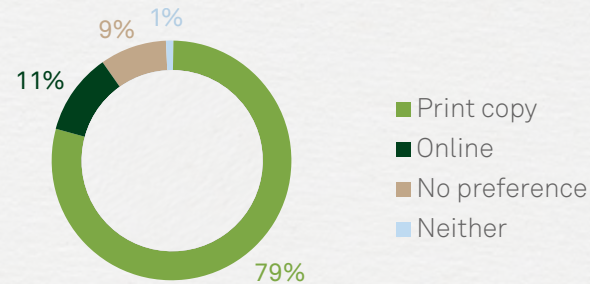
More in-depth use increases with land size, so that 44% of those with 25-50ha read them multiple times compared to 60% of those with farms 500+ha.

» Multiple use is also higher if aged 50-59 (62%).

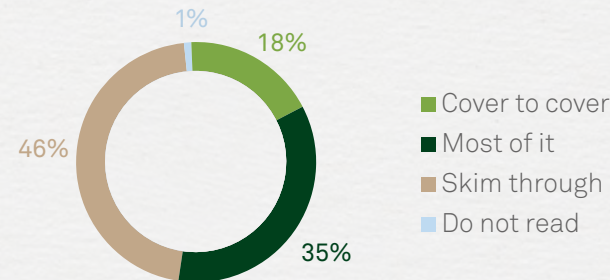
Nearly half say they skim their rural newspapers and/or publications (46%) although a further third (35%) say they would read most of the content.

Just over half read them multiple times (particularly men; 56%); the remainder only read them once.

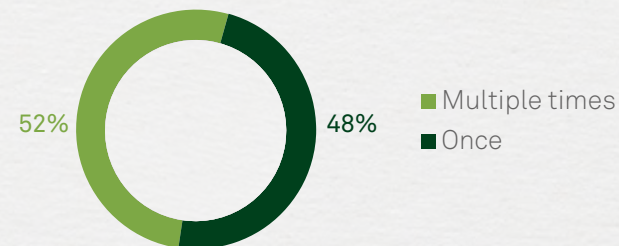
How do you prefer to read them?



Thinking about all of the Rural Newspapers and/or Publications (Magazines) you receive, how would you typically read them?



How often to you typically read them?



Total sample, n=820



Attitudes towards Rural Publications

Overall, rural publications are considered useful, with clearly written and relevant information.

» **Overall usefulness**

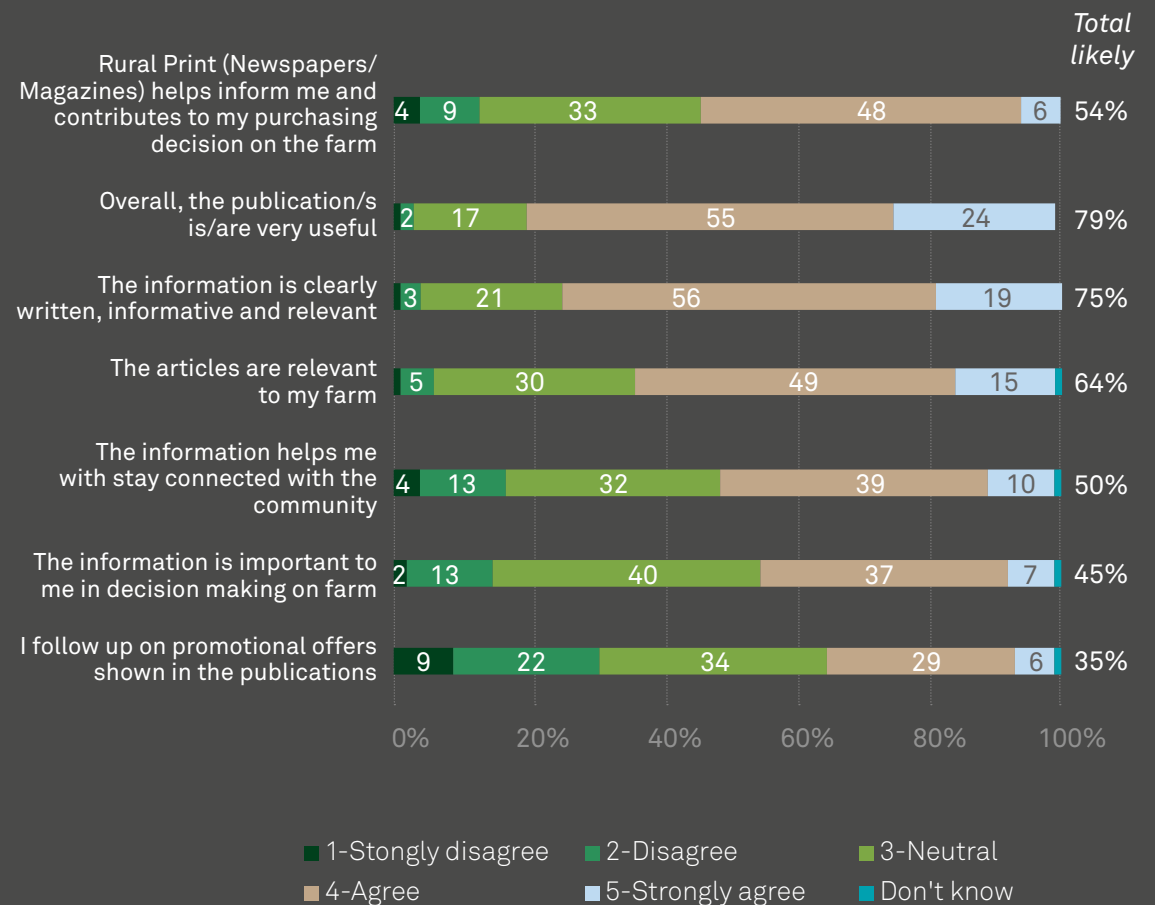
50-100ha=76%;
500+ha=85%.

» **Relevance**

50-100ha=54%;
500+ha=72%.

A third say they follow up on promotional offers shown in the publications.

How much do you agree or disagree with each of the following statements about Rural Newspapers and/or Publications in general? n=820



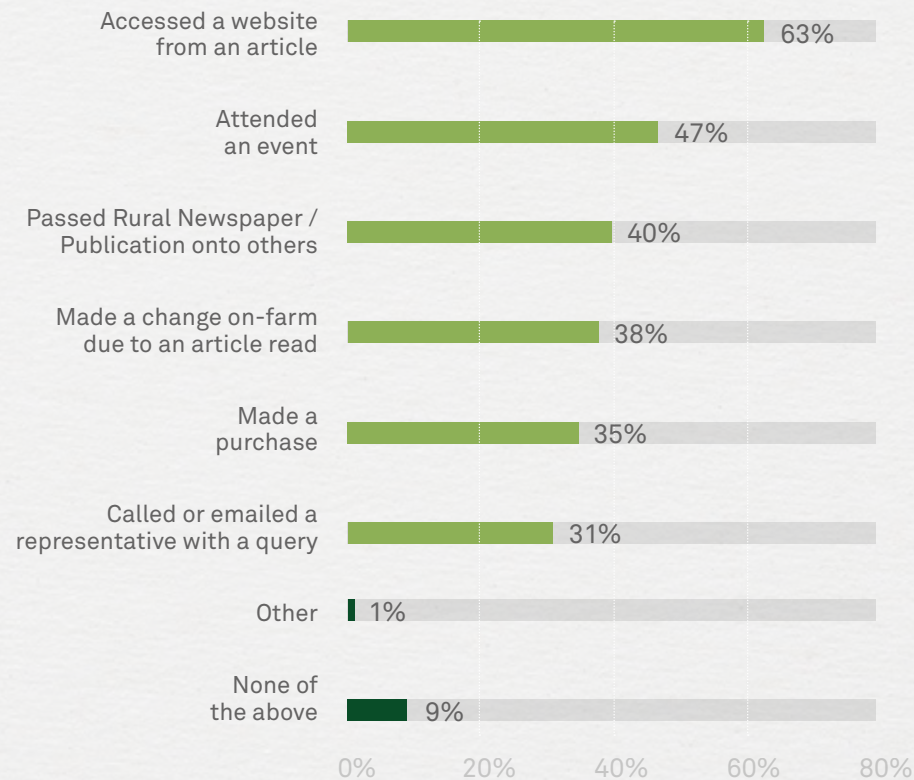
Actions Taken

Nearly two-thirds say they access websites from an article they read (increasing with property size: 25-50ha=45% to 500+ha=73%), while nearly half say they have attended an event.

A third say they have made a purchase after reading rural publications.

What actions have you undertaken as a result of reading your Rural Newspapers and/or Publications?

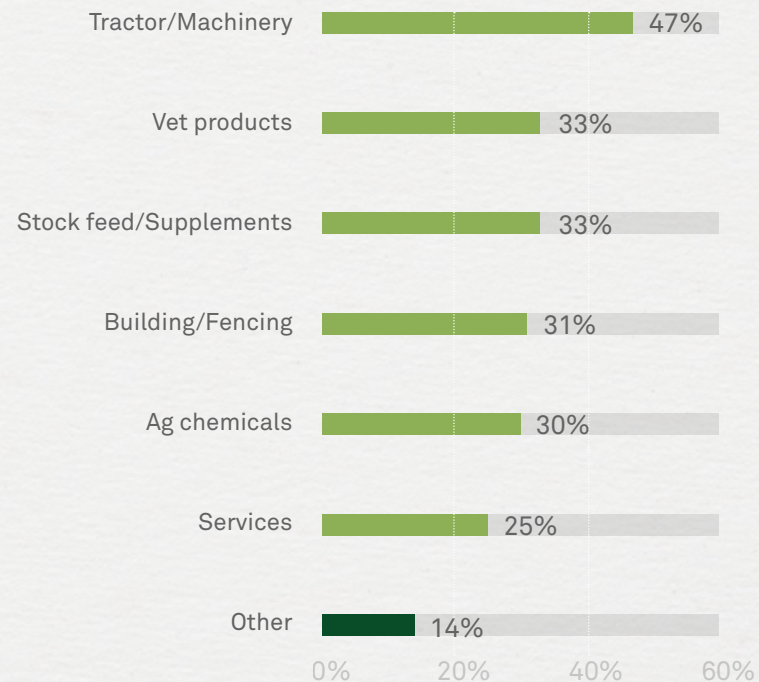
n=820



Items Purchased

The most popular products purchased as a result of reading a rural publication are tractors/machinery (bought by nearly half who have purchased something).

From the following list please
select the categories for which
you have made a purchase? n=287



Purchases via Print and Online

Tractors, motorbikes and drench stand out as items most frequently purchased after seeing it in a print publication.

In contrast, range of products purchased after seeing them in online publications is much broader (although still includes tractors, motorbikes and drench).

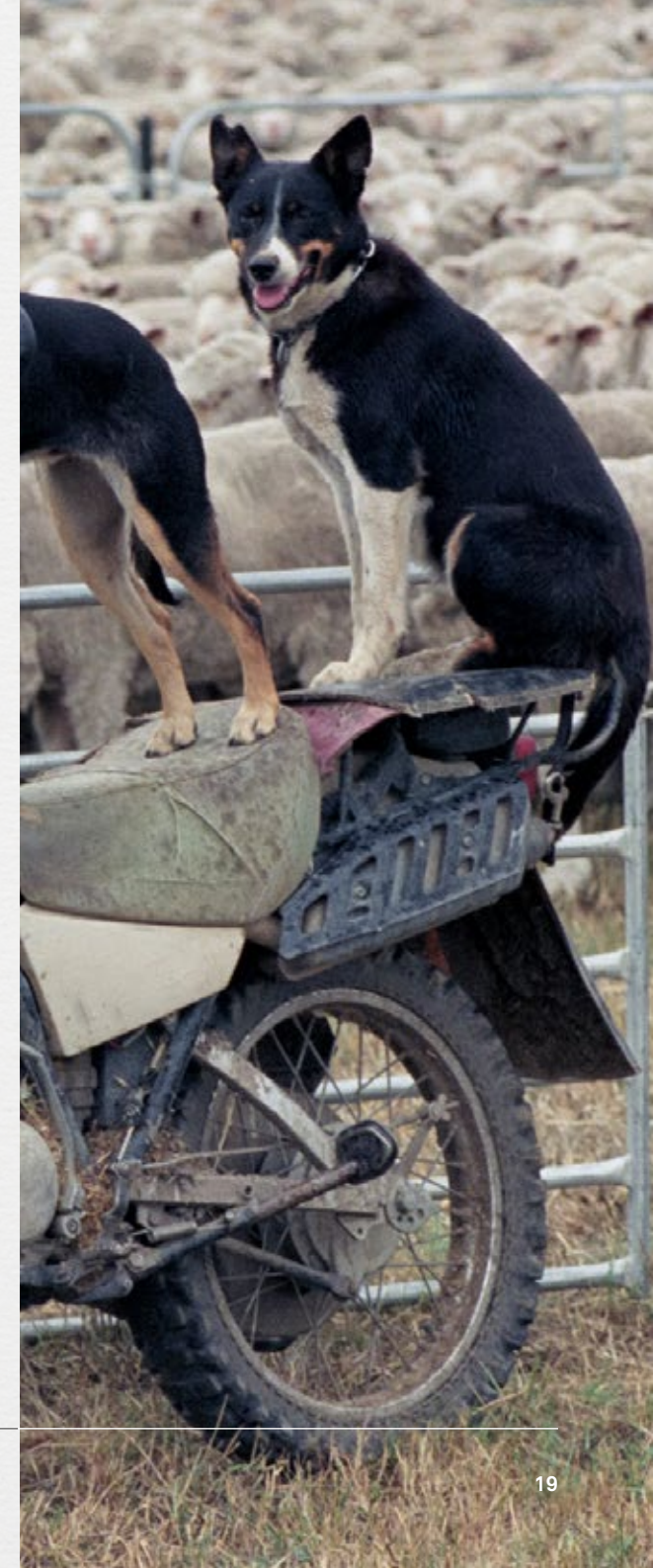
Via Print (n=545)



Via Online (n=336)



Per•ceptive



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INTERNET AND SOCIAL MEDIA



Internet Use

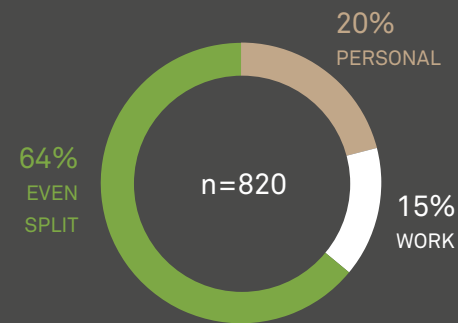
Smartphone use is high at 71% and it is the device of preference for nearly half the farmers surveyed.

Differences in smartphone preference include:

- » Dairy 57%;
Beef & Lamb=41%.
- » Farm owners=37%;
Farm manager=67%;
Support staff=60%.
- » Age effect:
18-29=78%;
60-69=23%.

Reason for use is split between work and personal, although personal is higher for:

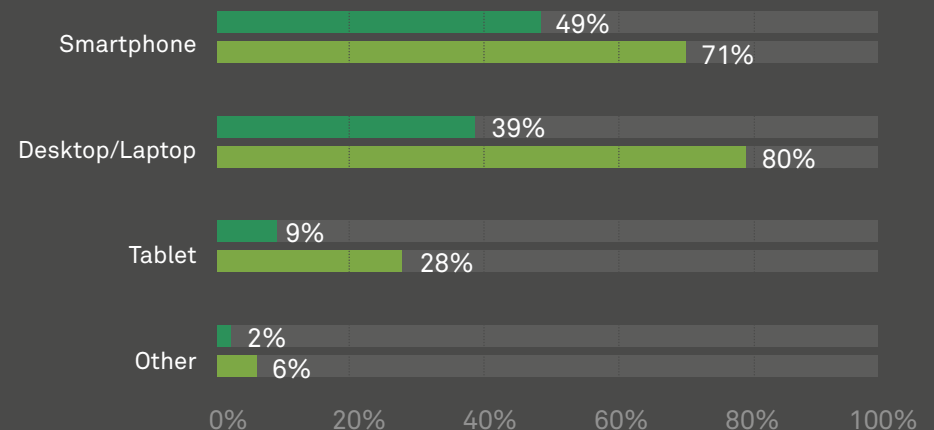
- » Support staff=36%
- » Aged 18-29=33%.



Do you most often use the internet for work or personal use?

Which of the following devices:

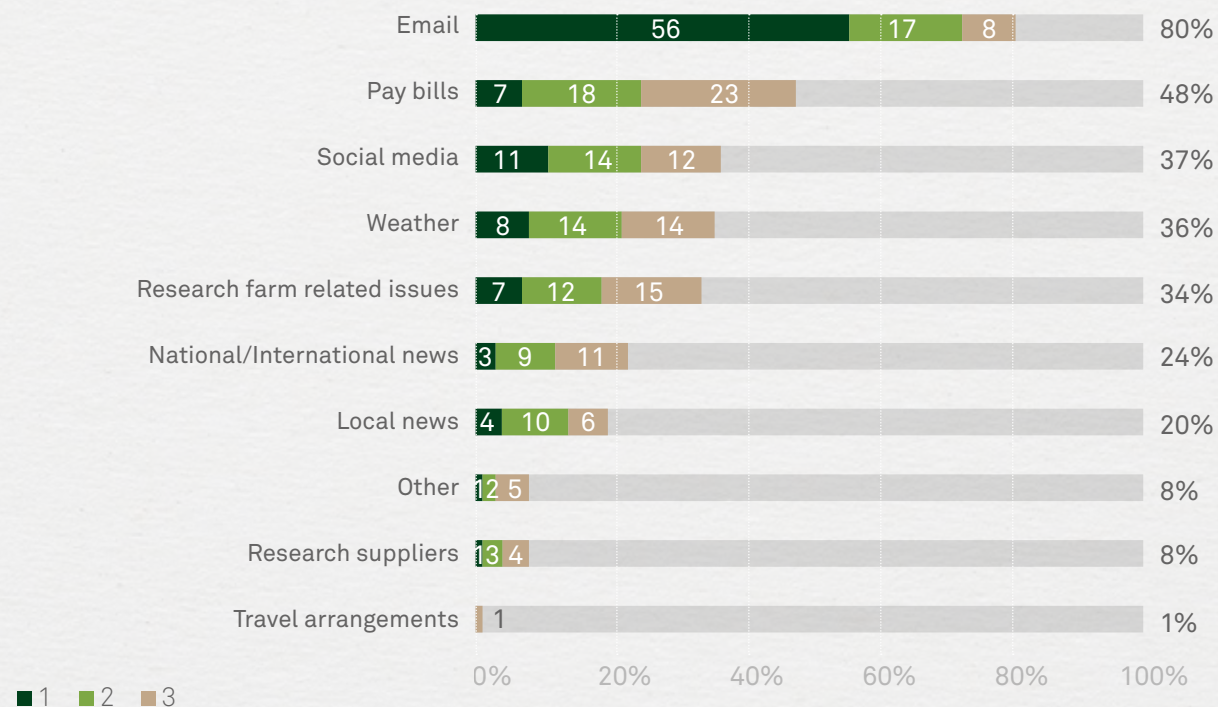
■ Do you use most often? ■ Do you use to connect to the internet n=820



Top 3 Uses for Internet

Email makes up the bulk of the reasons for using the internet, followed by paying bills, showing the importance of the internet for doing business. Socialisation is also important, via social media.

From the list below, please rank your 3 main uses for the internet (Rank top 3) n=820



Social Media Use

YouTube and Facebook are the most frequently accessed social media sites, followed by Google+.

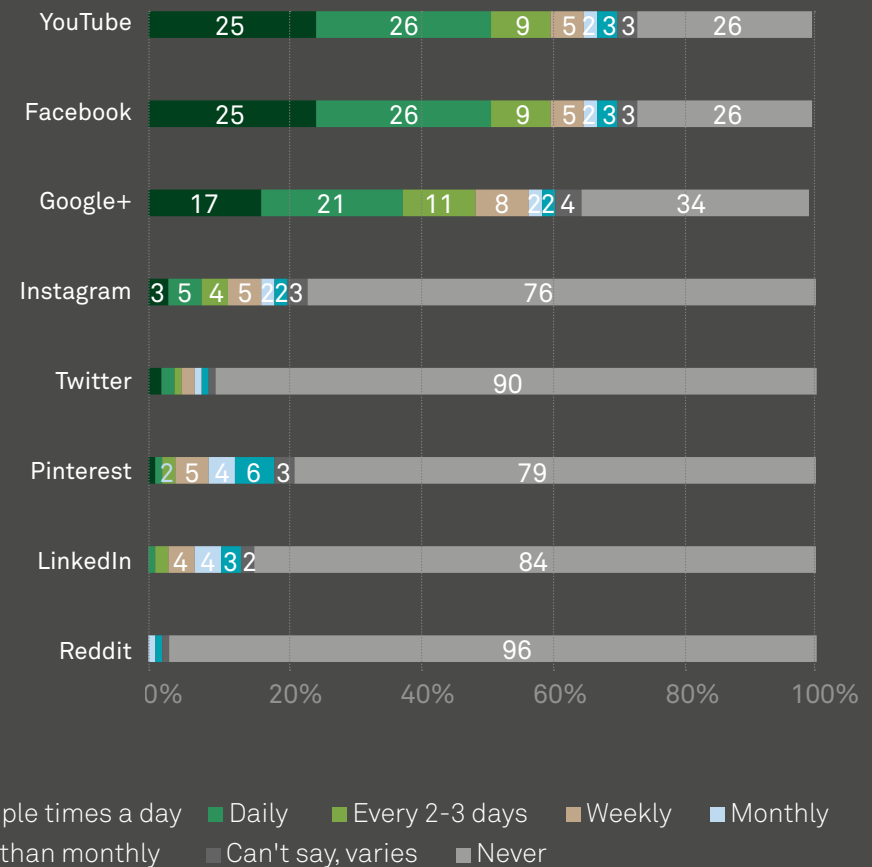
Age affects are apparent for:

- » **Facebook**
18-29=55% access multiple times;
50+=38% never.
- » **YouTube**
18-24=68% at least weekly;
50+=38% never.
- » **Instagram**
18-29=43% at least weekly;
50+=87% never.
- » **Pinterest**
30-39=69% never;
50+=82% never.

Women are more likely to access the following more frequently:

- » Facebook (38% multiple times)
- » Pinterest (16% at least monthly)

How often do you visit the below Social Media websites? n=820

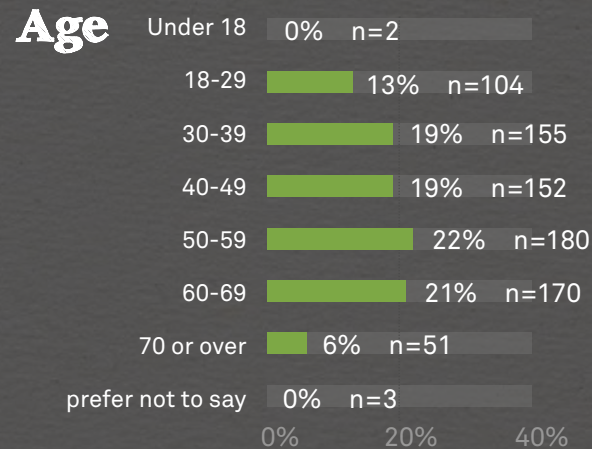
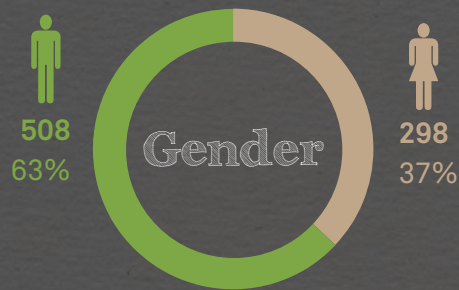


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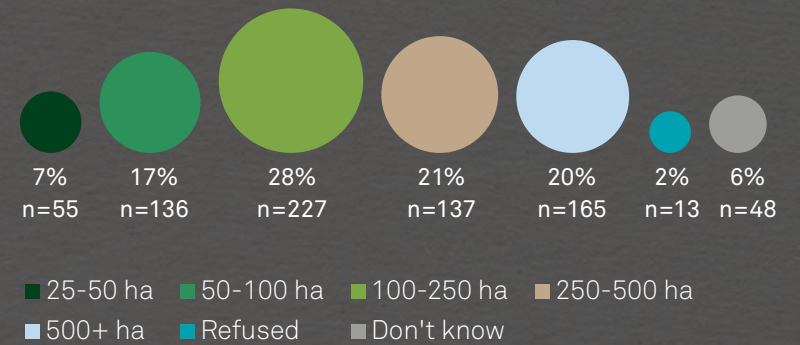
SAMPLE PROFILE



Demographics



Size of property (Ha)

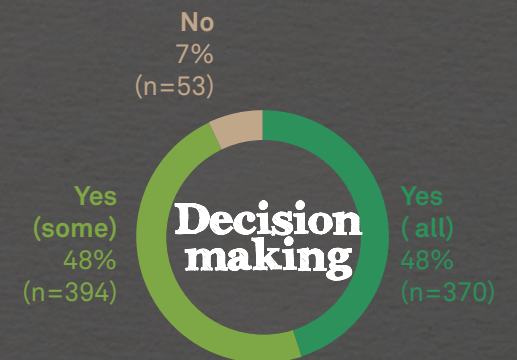
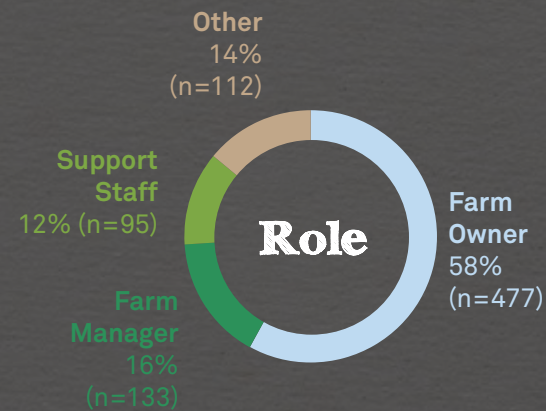


Industry

Arable	4% (n=36)
Beef & Lamb	44% (n=363)
Dairy	52% (n=421)
Horticultural	8% (n=67)
Lifestyle block	2% (n=17)
Other	2% (n=18)
Other livestock	6% (n=49)

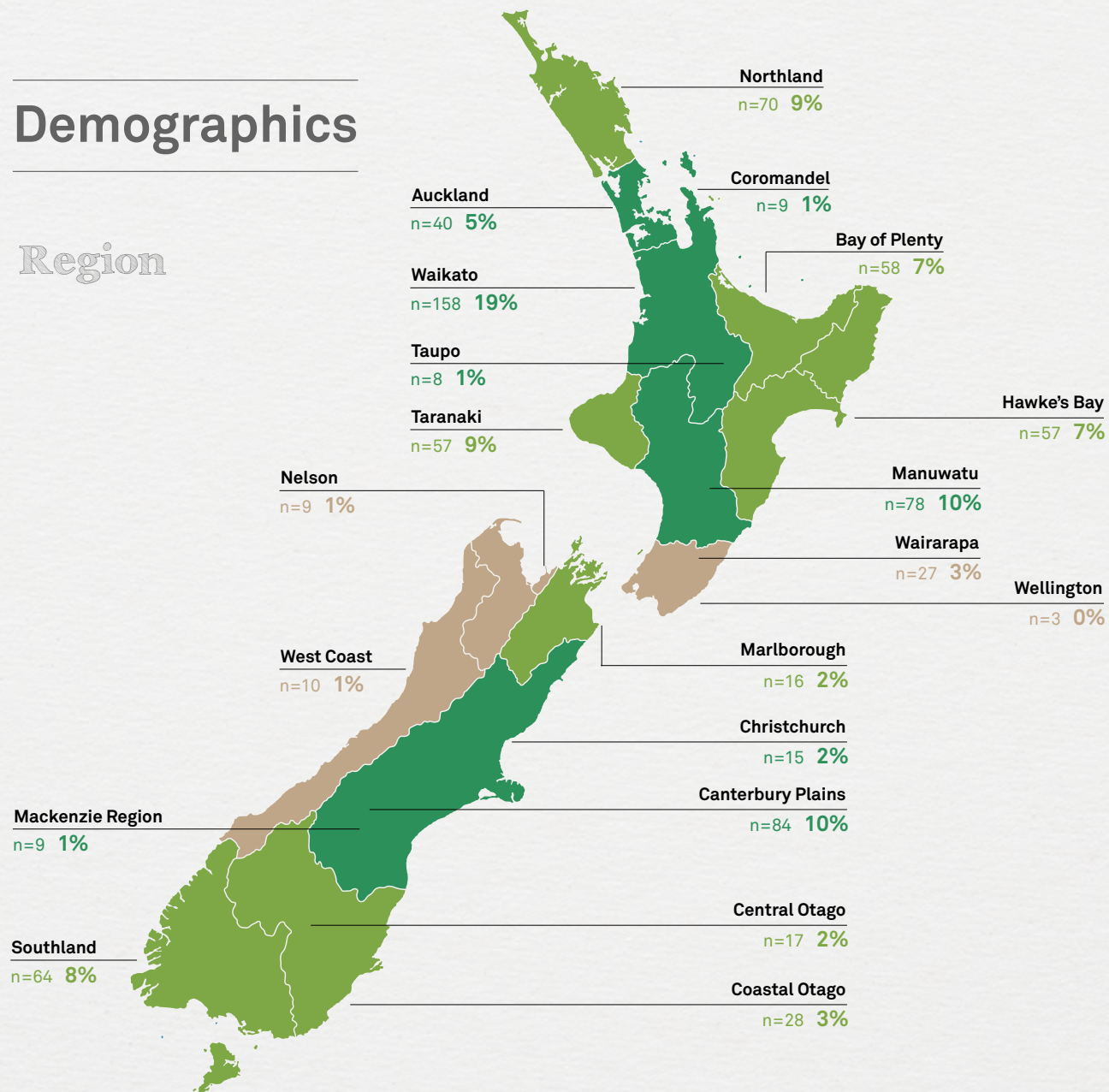
Annual Revenue

Between \$151-\$499	22% (n=178)
More than \$500K	29% (n=230)
Refused	15% (n=119)
Don't know	34% (n=275)



Demographics

Region



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APPENDIX

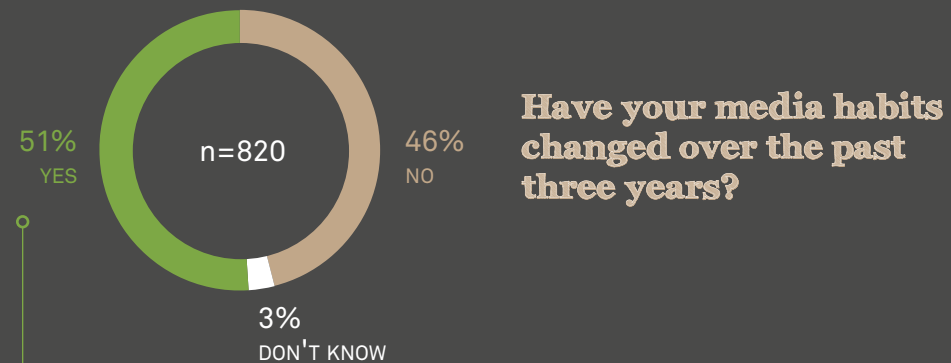


Change in Media Habits

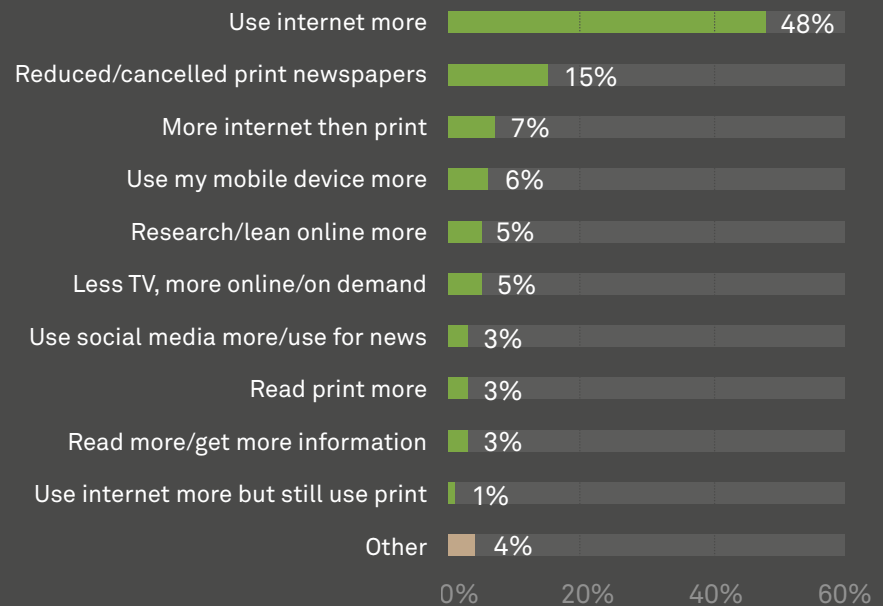
Half of those surveyed say they have changed their media habits in the last three years (51%).

Of these, the main change is the increased use of the internet (48%).

While use of print has reduced (for instance 15% go as far as cancelling print newspapers), it does not mean it has disappeared altogether.



In what way have they changed? n=410

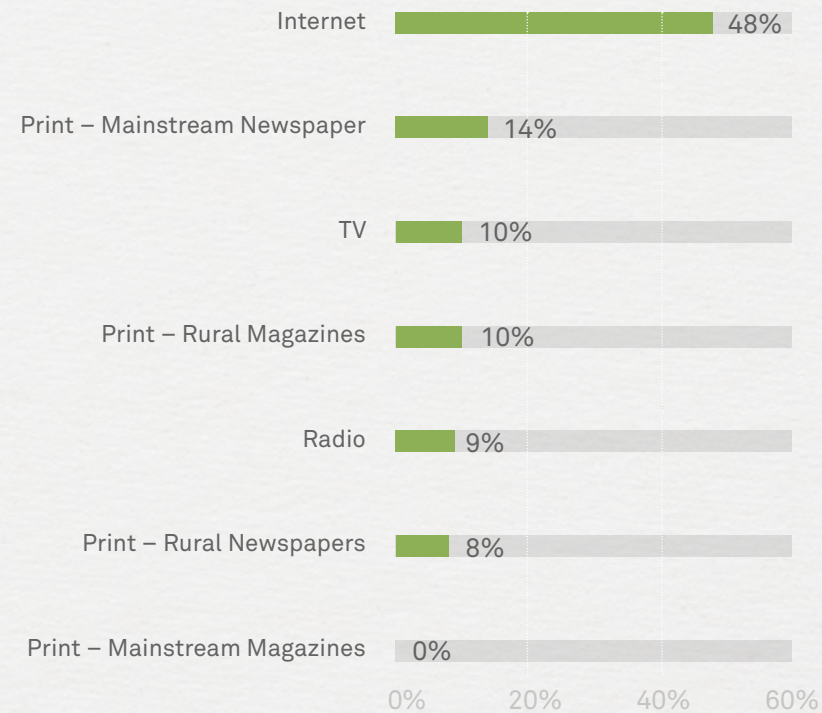


Main Media

Given the frequency of access of the internet, it is not surprising that it is selected as the main media form accessed.

Which of the following is your main source of media?

n=Those who read each at least every 2-3 days



Thank you

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