

TNS Independent Rural Readership Survey

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Contents

	Page
Section 1 Introduction	4 – 6
Section 2 Value in Rural Publications	7 – 10
Section 3 Detailed Results; All Farmers	11 – 19
Section 4 Detailed Results; Dairy Farmers	20 – 28
Section 5 Detailed Results; All Farmers Excluding Dairy Farmers	29 – 37
Section 6 Technical Information & About TNS	38 – 39

Section 1

Introduction



The research is designed for a dual purpose; to help advertisers determine the most appropriate communication options for their clients and to assist NZX Agri to manage its publications in terms of meeting the needs of the rural community

Situation

- NZX Agri recognises that there are a considerable number of channels available for suppliers to communicate with farmers who have limited time available to receive their messages; i.e. farmers are 'time poor'
- As a major publisher of regular and specialised publications, NZX Agri has an aim of assisting advertisers determine the most appropriate communication mechanism for any given situation
- With this objective, NZX Agri has commissioned TNS New Zealand to independently research readership behaviours across all rural publications each quarter and thereby provide the advertising sector with robust, independent and reliable information for decision making
- The research also serves the purpose of assisting NZX Agri to monitor its own performance and develop strategies to ensure that its major publications; *Farmers Weekly*, *Country-Wide* and *NZ Dairy Exporter* continue to meet the needs of the farming community and advertisers alike
- This report is available directly from TNS New Zealand. If additional information is required, TNS may be able to generate this from the existing interview data, or advertisers are welcome to include their own confidential questions within the TNS survey

The latest research indicates that the farming newspapers continue to be highly relied on by farmers and that NZX's publications are well regarded for the value that they add and for their editorial quality

Key Point Summary

1

Across all farmers, farming newspapers and magazines are the most frequently identified source of farming information

2

Readership of farming publications is most directly influenced by the quality of articles about farming news and agri-business, farm management and research and development

3

About 94% of all farmers at least open and flick through each of the major publications

4

Farmers Weekly is highly valued for providing knowledge and for being worth reading, and has the largest proportion of farmers (excluding dairy specific publications) who read more than 60% of the publication each week

5

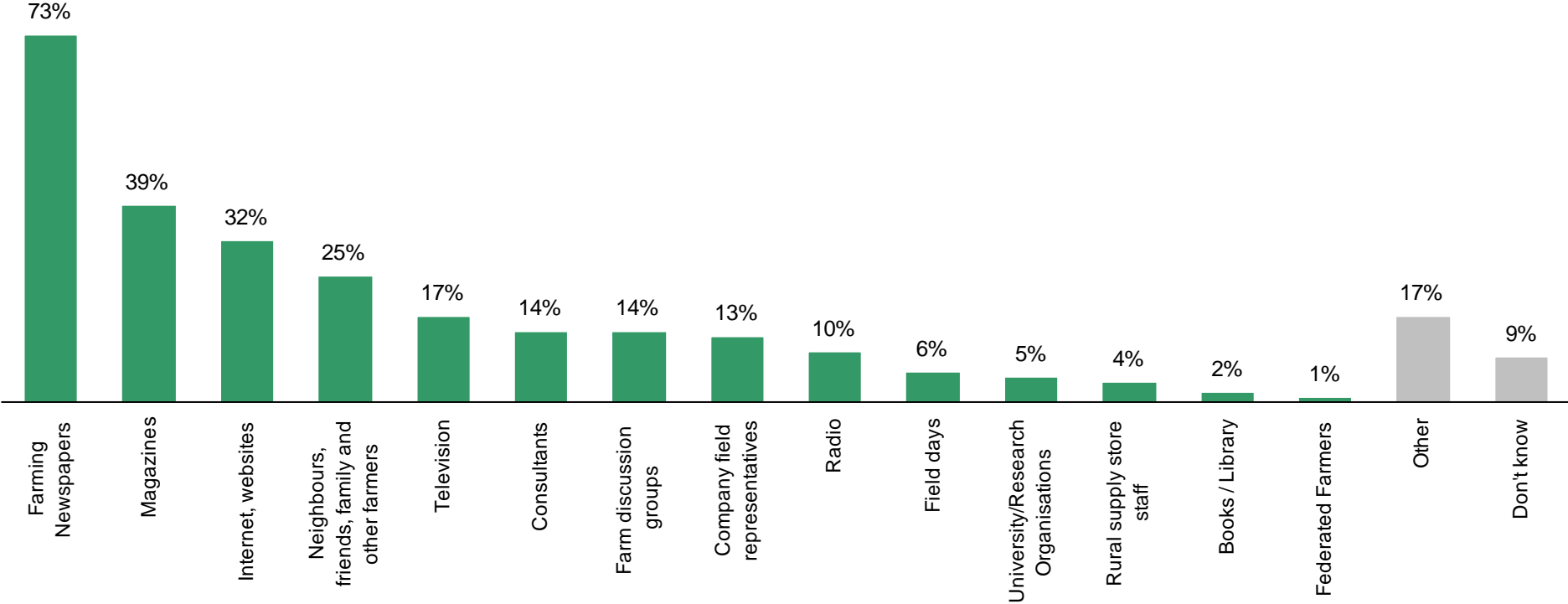
Amongst dairy farmers, *NZ Dairy Exporter* is valued for providing knowledge ahead of all other publications measured and for being a publication that is worth reading

Section 2

Value in Rural Publications

For all information sources mentioned – farming publications are the most frequently mentioned

Sources of Farming Information – All Mentioned⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: All Respondents n = 450
2. Where would you say you get your farming information?
3. Question is multiple response so total will sum to greater than 100%

Attributes that are most important to farmers in terms of rural publications are having good quality articles on farm news, farm management and about research & development



Notes: 1. Base: All Farms, n = 450 – September 2010
 2. Based on Jaccard Analysis

Repeating the analysis for dairy farmers and all other farmers separately reveals very similar perceptions of importance for the various attributes that farmers value in rural publications

Rank	Dairy Farmers Attribute	Other Farmers (Excluding Dairy) Attribute	
1	Good farm news, issues and agri-business articles	Good farm news, issues and agri-business articles	High Importance
2	Good farm management articles	Good farm management articles	
3	Good research & development articles	Good livestock & animal health articles	Medium Importance
4	Good pasture management articles	Good research & development articles	
5	Good livestock & animal health articles	Good market information and analysis	
6	Articles that inspire	Good pasture management articles	Moderate Importance
7	Good market information and analysis	Articles that inspire	
8	Good articles about machinery and equipment	Good articles about rural real estate	Low Importance
9	Good articles about rural real estate	Good articles about machinery and equipment	



Notes: 1. Base: All Farms, n = 450 – September 2010
2. Based on Jaccard Analysis

Section 3

All Farmers

Excluding dairy specific publications, *Farmers Weekly* is evaluated extremely positively across all the key readership measures

Key Point Summary - All Farmers

1

Excluding the dairy specific publications, *Farmers Weekly* is rated the publication that is most worth reading and is also rated by more farmers for providing valuable knowledge than any other publication

2

A higher proportion of farmers spend 30 minutes or more reading each issue of *Farmers Weekly* than *Straight Furrow*, *Rural News* or *Country-Wide*

3

A higher proportion of farmers read 60% or more of each issue of *Farmers Weekly* than any other non-dairy specific publication

4

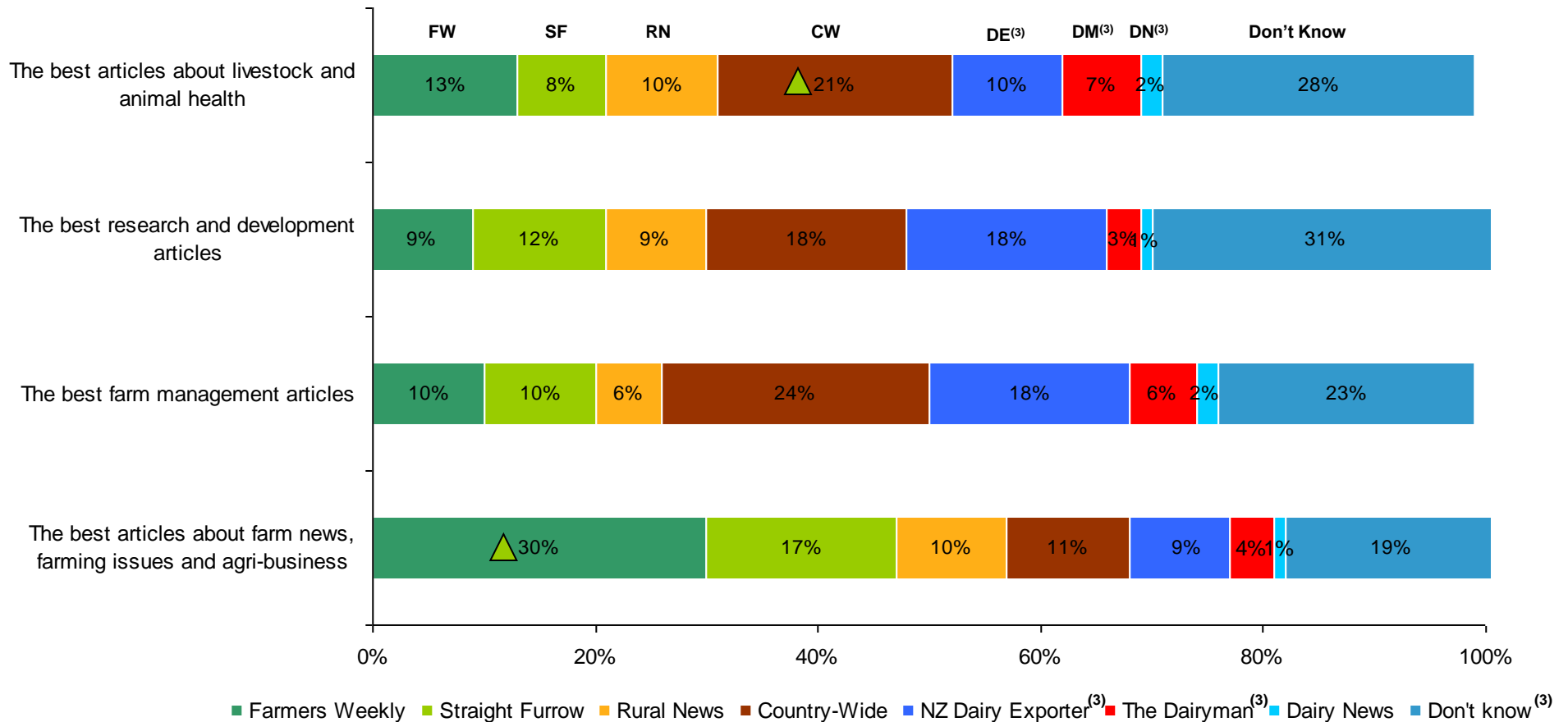
Farmers Weekly is regarded by more farmers as having the best articles about livestock markets, the best articles about farm news and agri-business, and best real estate listings, while *Country-Wide* is recognised for livestock and animal health, and articles that inspire

5

Straight Furrow is regarded by more farmers as having the best articles about farm machinery and equipment

Farmers Weekly is recognised by more farmers than any other publication for having the best articles about farm news and agri-business, while *Country-Wide* is recognised by more farmers for having the best articles about animal health

What Publications Are Most Strongly Recognised For – All Farmers⁽¹⁾⁽²⁾⁽⁴⁾



Notes: 1. Base: All farms, n = 450; Dairy n = 195

2. QNZX8 What one publication do you most associate with each of the following statements...?

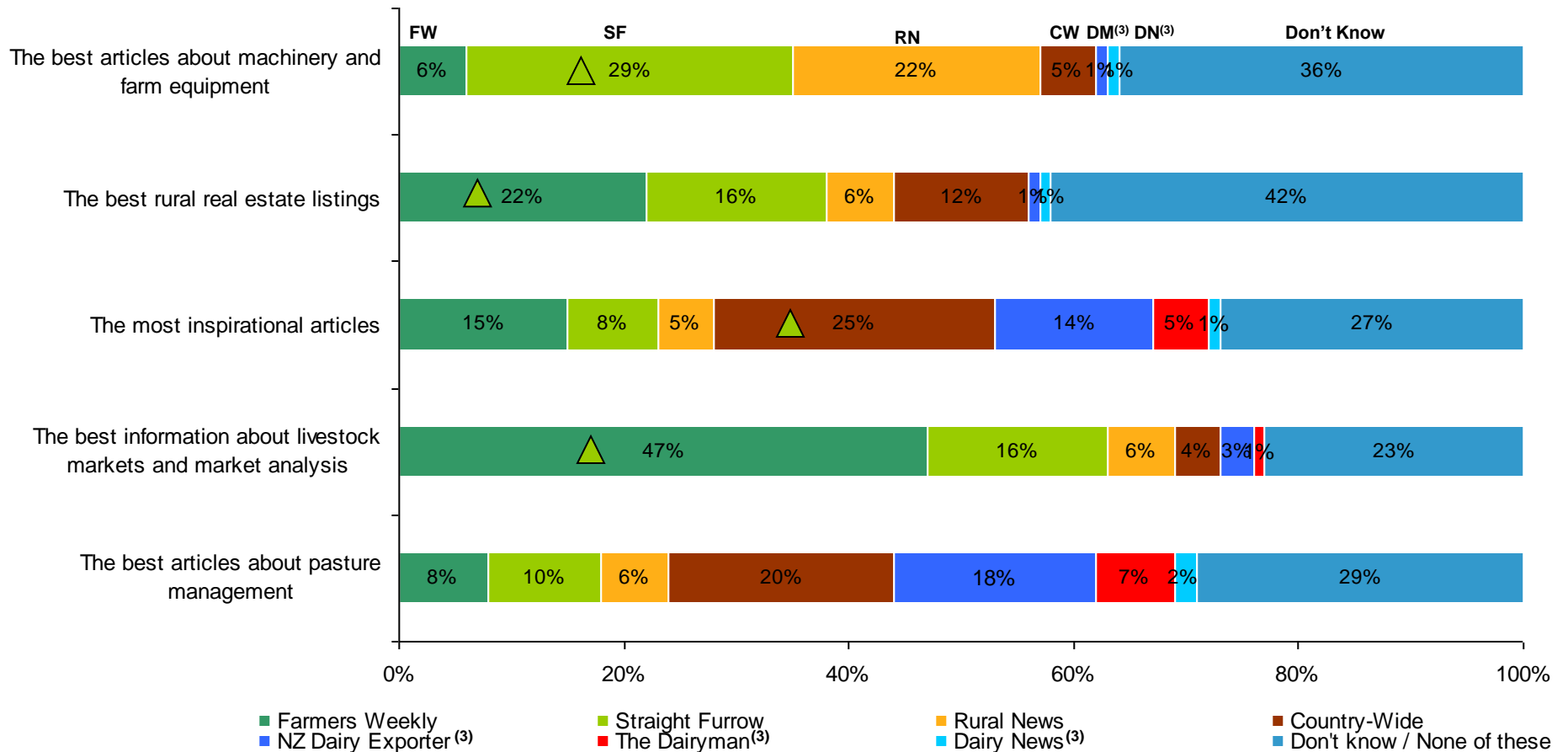
3. Asked of Dairy Farmers Only

4. Significance tests calculated on proportions using a 95% CI

▲ Significantly higher than all other publications (excluding don't know / none of these)

Overall, 47% of farmers recognise *Farmers Weekly* for having the best articles about livestock markets and it is also strongly recognised for its real estate listings, while *Country-Wide* is regarded for articles that are inspirational

What Publications Are Most Strongly Recognised For – All Farmers⁽¹⁾⁽²⁾⁽⁴⁾



Notes: 1. Base: All farms, n = 450; Dairy n = 195

2. QNZX8 What one publication do you most associate with each of the following statements...?

3. Asked of Dairy Farmers Only

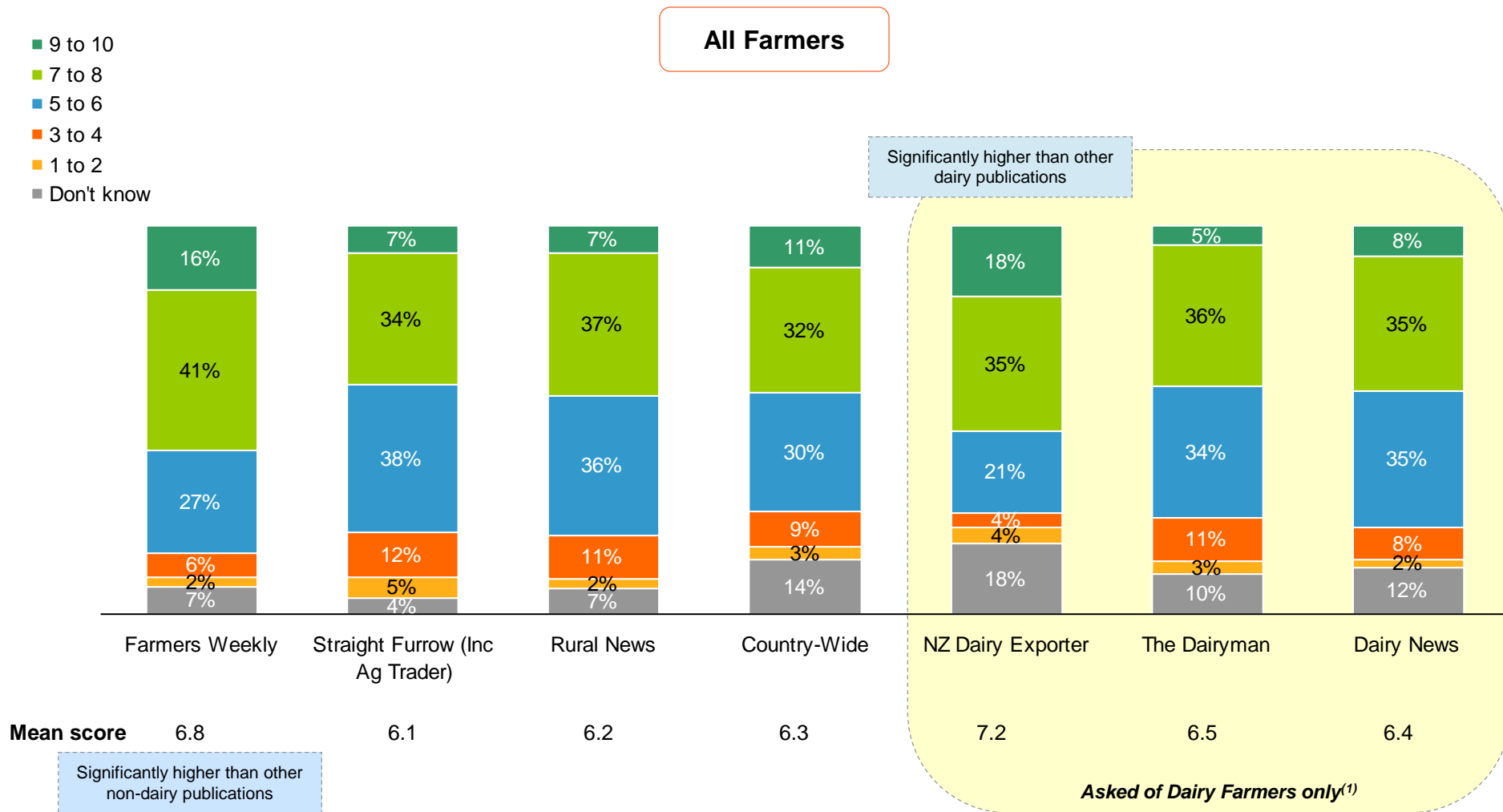
4. Significance tests calculated on proportions using a 95% CI

▲ Significantly higher than all other publications (excluding don't know / none of these)



Excluding the dairy publications, *Farmers Weekly* is being rated more highly than the other publications for providing knowledge

Publications Providing Knowledge – All Farmers⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: All farms, n = 450; Dairy Farms, n= 195

2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)

3. Significance tests calculated on mean scores using a 95% CI

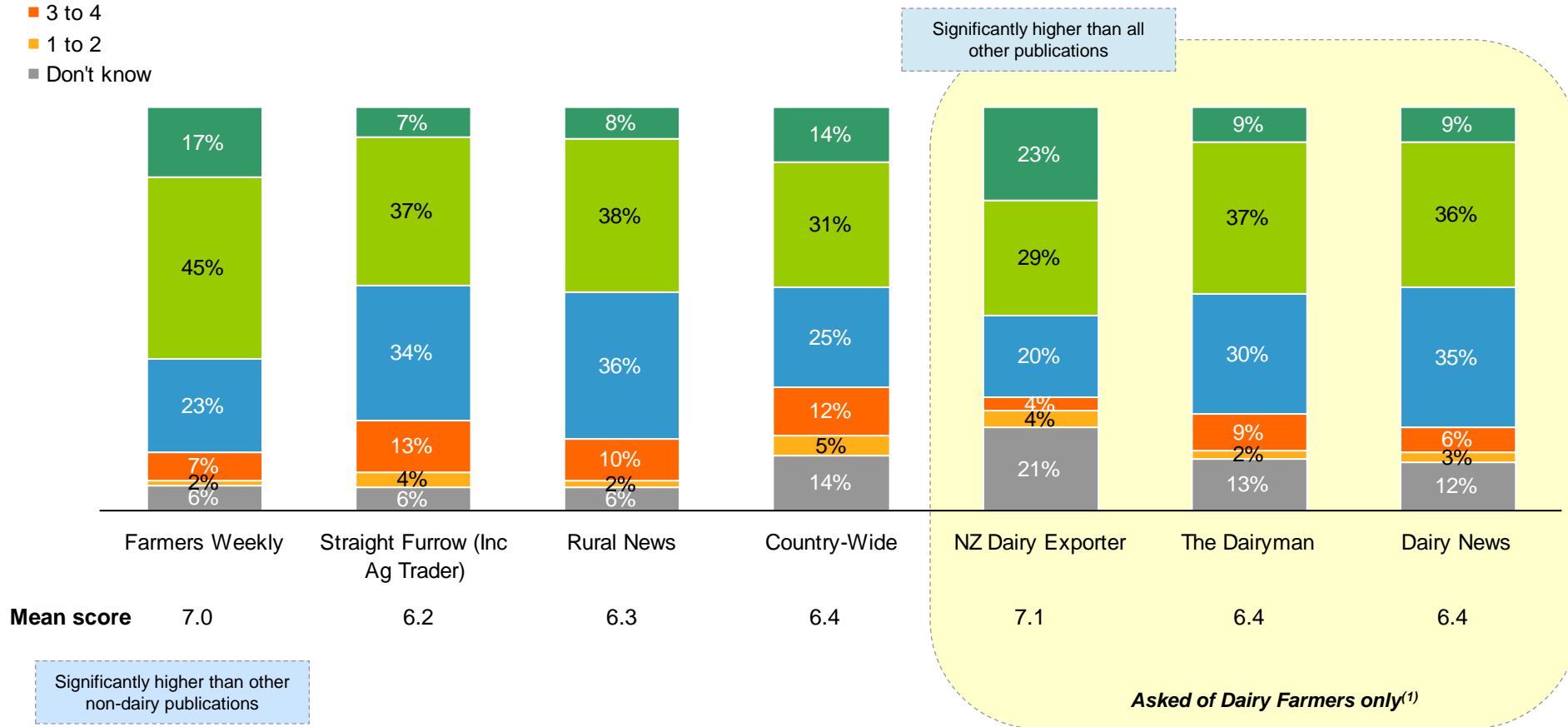


Excluding the dairy publications, *Farmers Weekly* also has the highest evaluation score for being a publication worth reading

Publications Worth Reading – All Farmers⁽¹⁾⁽²⁾⁽³⁾

- 9 to 10
- 7 to 8
- 5 to 6
- 3 to 4
- 1 to 2
- Don't know

All Farmers



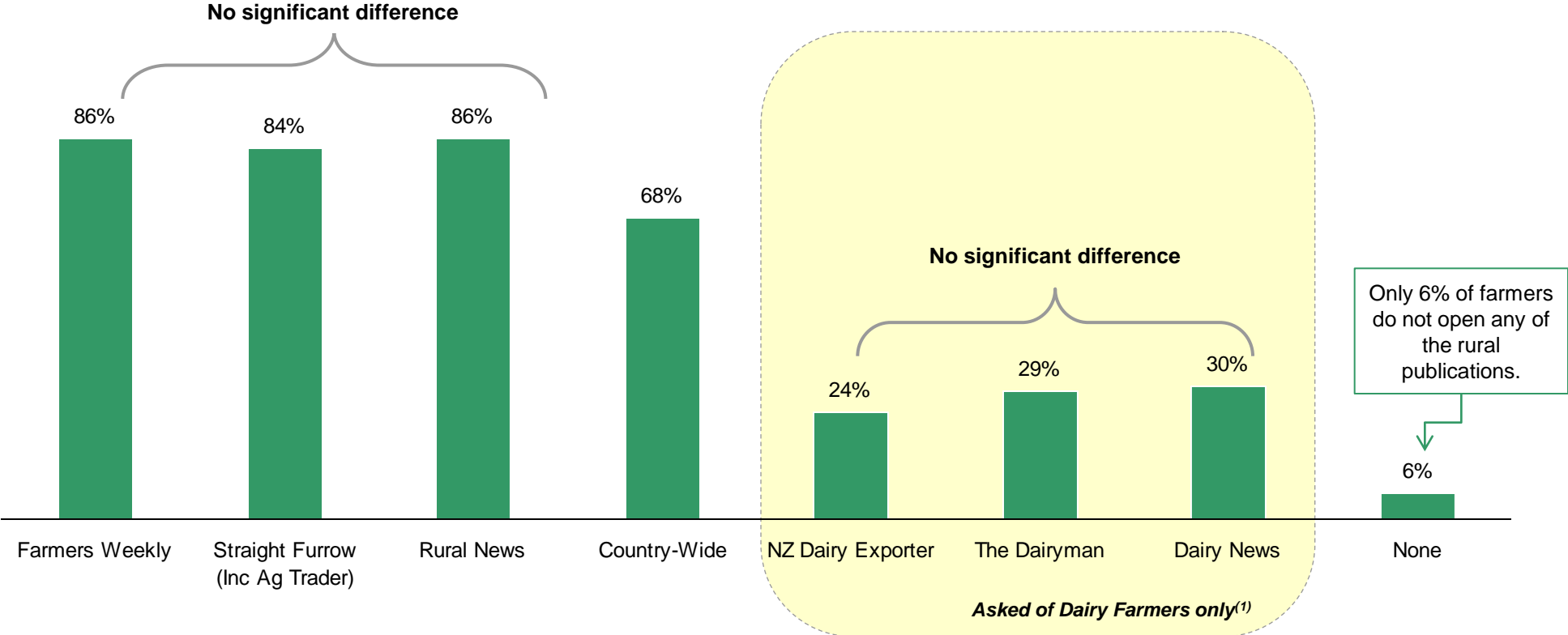
Notes: 1. Base: All farms, n = 450; Dairy n = 195
 2. In terms of being worthwhile reading, how worthwhile is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI



Across all farmers, *Farmers Weekly*, *Straight Furrow* and *Rural News* are at least opened and 'flicked through' by a similar proportion; between 84% and 86%

Publications at Least Opened in Last Month – All Farmers⁽¹⁾⁽²⁾⁽³⁾

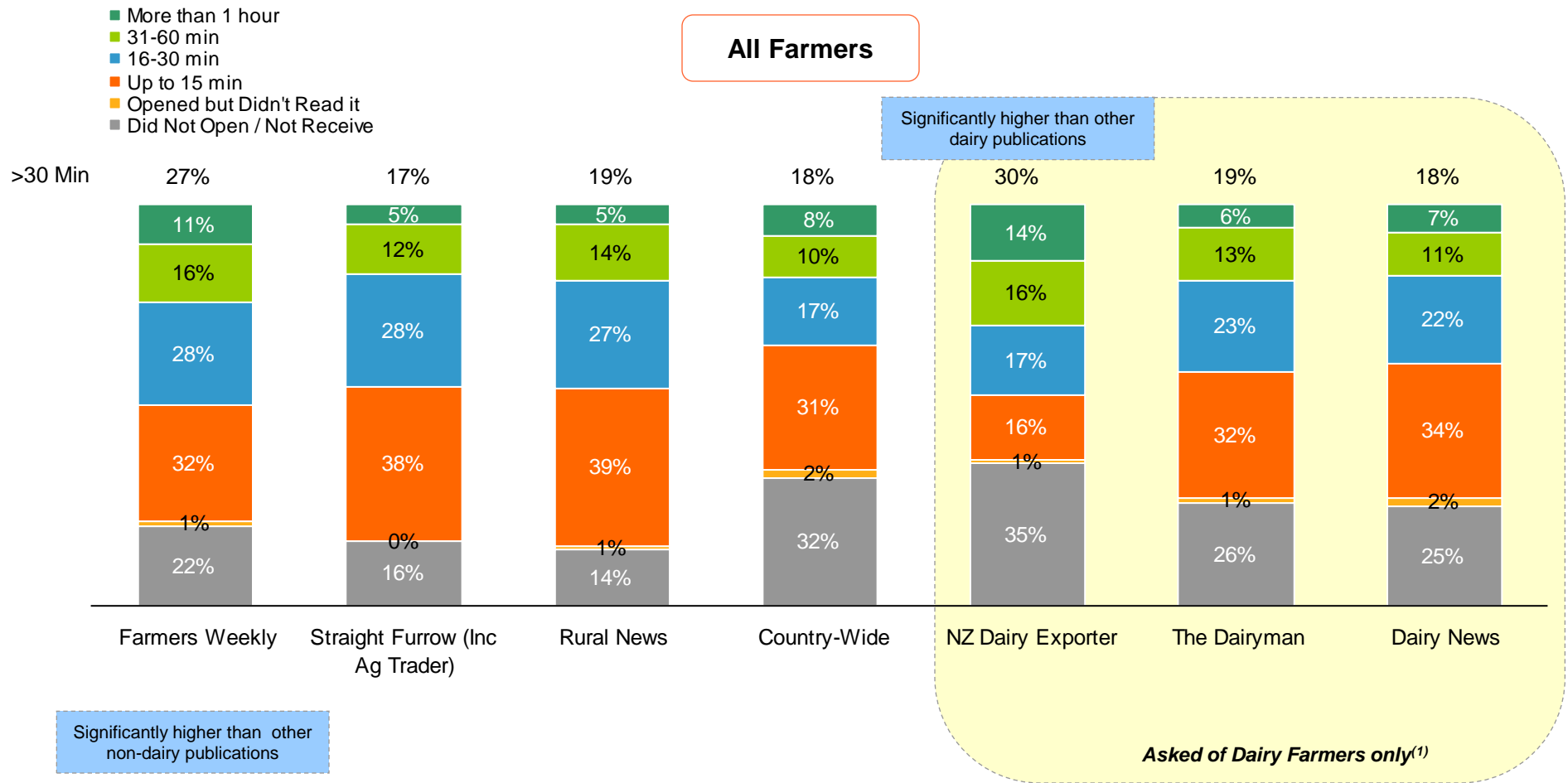
All Farmers



Notes: 1. Base: All Farmers, n = 450; Dairy n = 195
 2. In the last month, what of the following publications have you at least opened and 'flicked' through?
 3. Significance test based on 95% CI

Excluding the dairy publications, a higher proportion of farmers spend more than 30 minutes reading *Farmers Weekly* than *Straight Furrow*, *Rural News* or *Country-Wide*

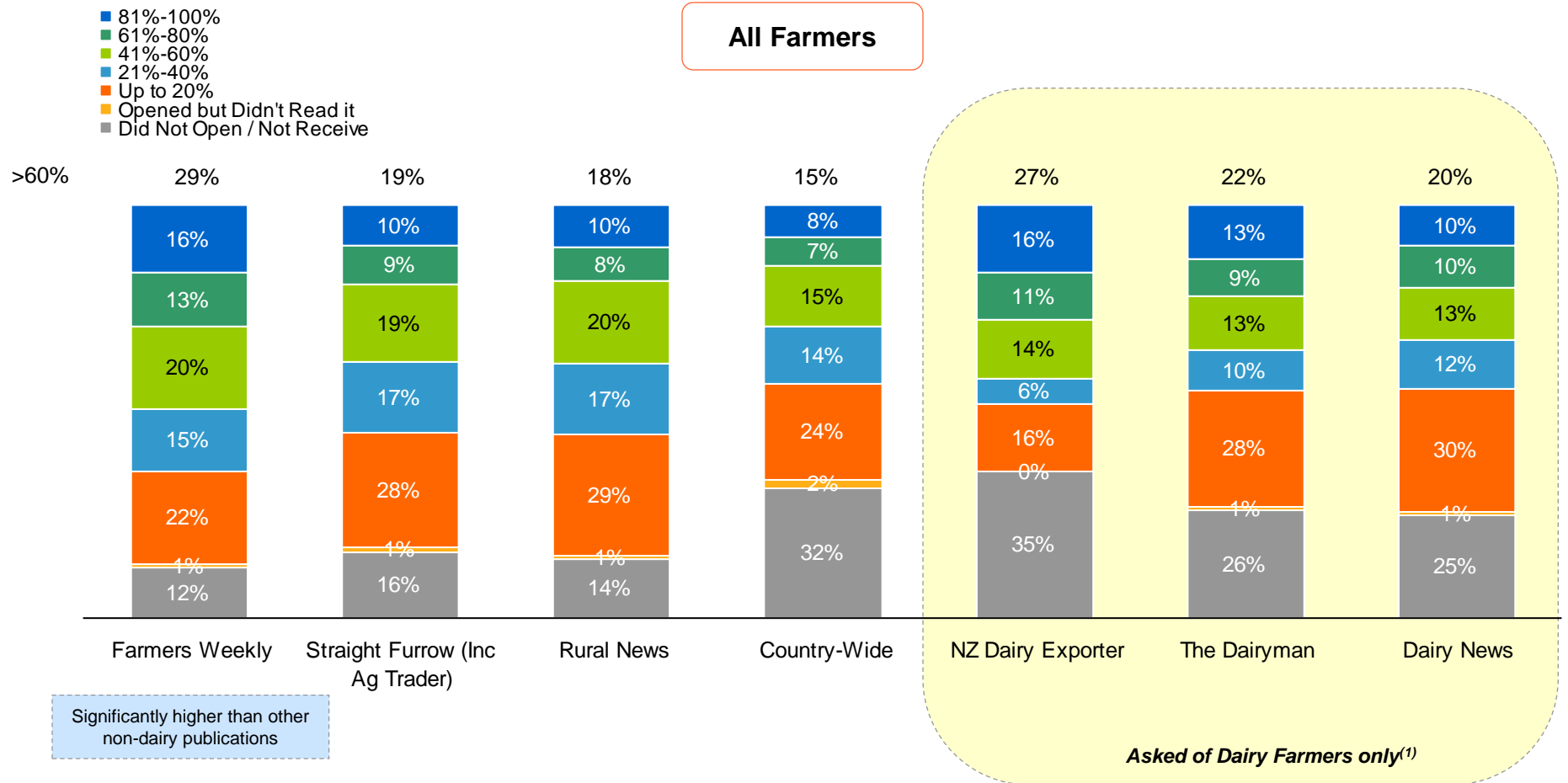
Time Spent Reading – All Farmers⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: All farms, n = 450; Dairy n= 195
 2. How much time have you typically spent reading each issue of [PUBLICATION] in the last month?
 3. Significance tests calculated on proportions using a 95% CI

Excluding the dairy publications, a higher proportion of farmers read more than 60% of *Farmers Weekly* than any other publication

Proportion of Publication Read – All Farmers⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: All farms, n = 450; Dairy n= 195
 2. And still thinking about the last month, about what percentage of each issue of [PUBLICATION] have you typically read?
 3. Significance tests calculated on proportions using a 95% CI

Section 4

Dairy Farmers

NZ Dairy Exporter is the most highly regarded of the dairy specific publications

Key Point Summary - Dairy Farmers

1

NZ Dairy Exporter is rated by more dairy farmers than any other publication for the quality of its editorial about research & development, farm management, pasture management and for articles that inspire

2

Dairy farmers consider *NZ Dairy Exporter* more highly relative to other publications for providing knowledge that helps them with their farming and as a publication that is worth reading

3

More dairy farmers open and at least 'flick through' *Farmers Weekly* than any of the dairy specific publications

4

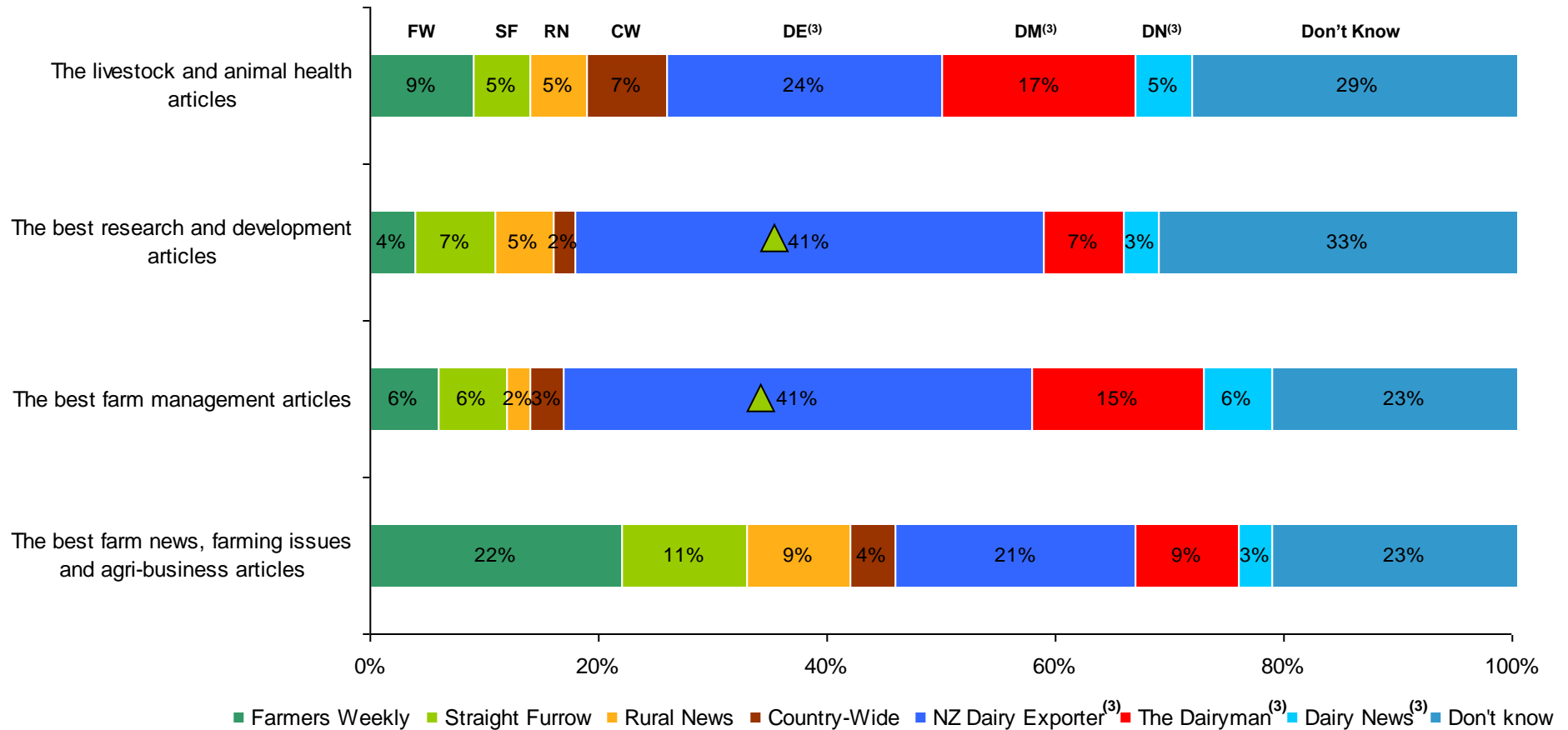
NZ Dairy Exporter is the dairy specific publication that has the highest proportion of farmers who spend more than 30 minutes reading each edition

5

The proportion of dairy farmers who read 60% or more of each issue is about the same for each of the dairy specific publications

NZ Dairy Exporter is regarded by more dairy farmers than any other publication as having the best editorial about research and development and about farm management...

What Publications Are Most Strongly Recognised For – Dairy Farmers Only⁽¹⁾⁽²⁾⁽⁴⁾

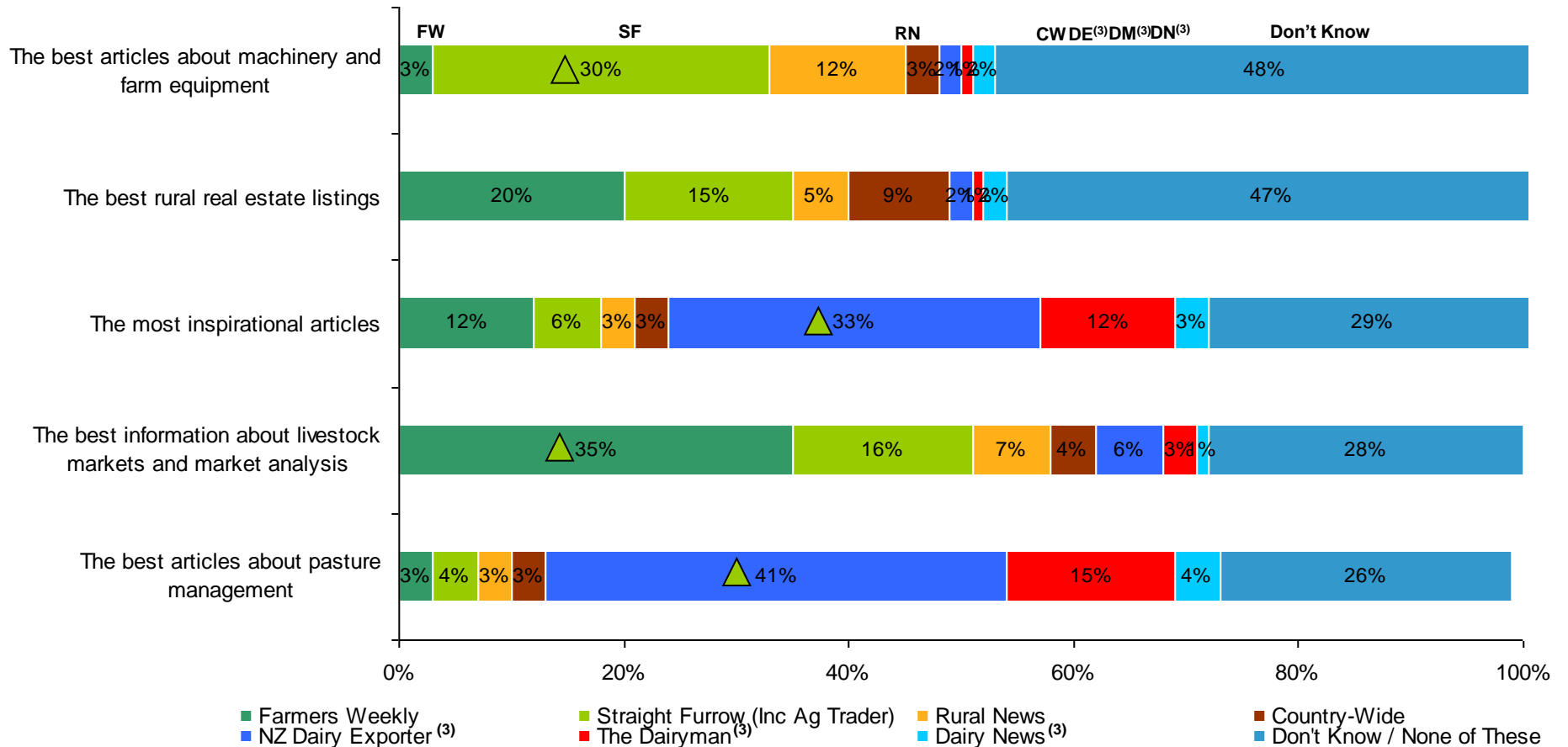


Notes: 1. Base: Dairy n = 195
 2. QNZX8 What one publication do you most associate with each of the following statements...?
 3. Asked of Dairy Farmers Only
 4. Significance tests calculated on proportions using a 95% CI

▲ Significantly higher than all other publications (excluding don't know / none of these)

... and as having the best editorial about pasture management and articles that inspire. *Farmers Weekly* is rated the best by more farmers for editorial about livestock markets and *Straight Furrow* for farm machinery

What Publications Are Most Strongly Recognised For – Dairy Farmers Only⁽¹⁾⁽²⁾⁽⁴⁾



Notes: 1. Base: Dairy n = 195

2. QNZX8 What one publication do you most associate with each of the following statements...?

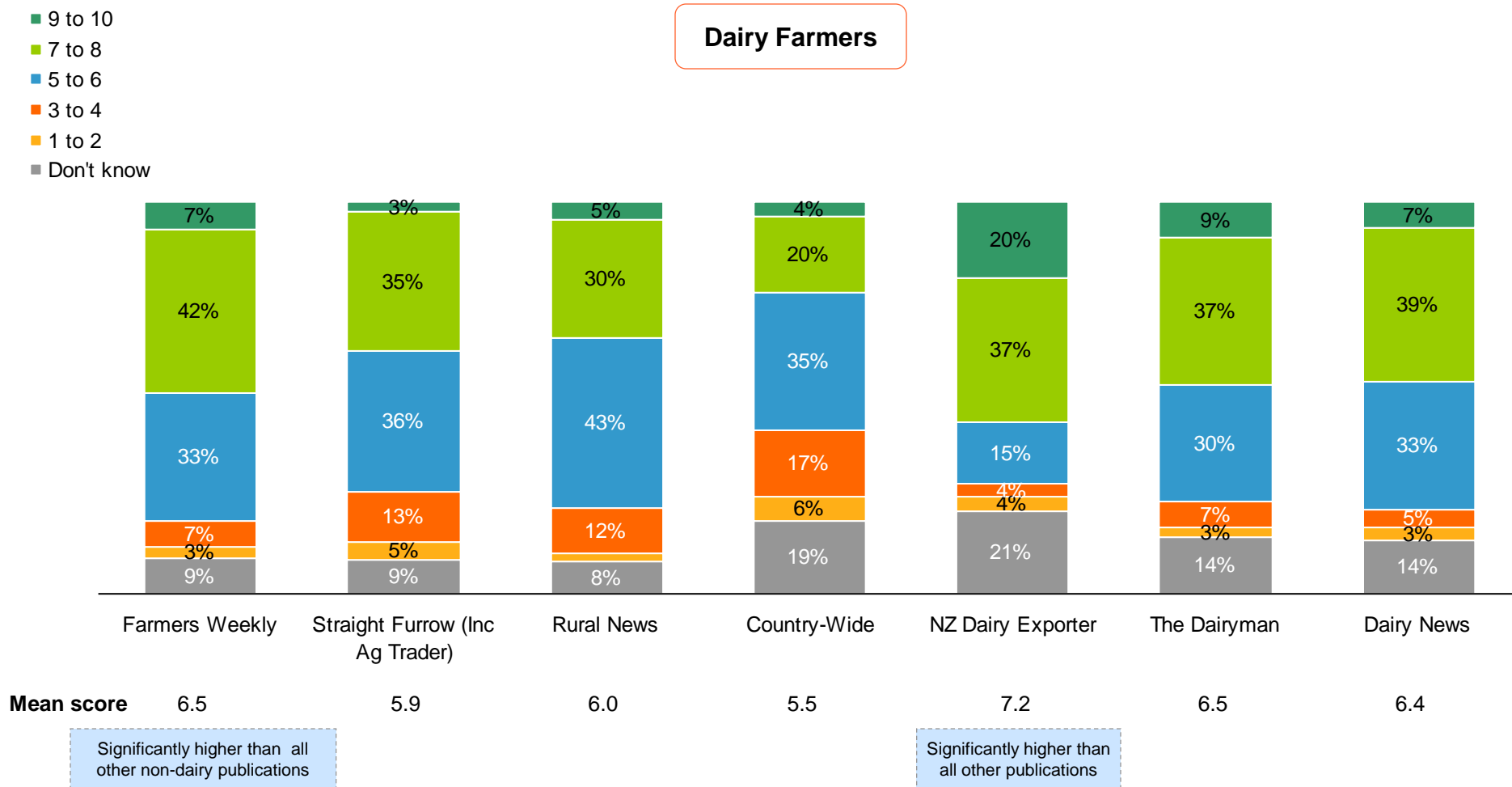
3. Asked of Dairy Farmers Only

4. Significance tests calculated on proportions using a 95% CI

▲ Significantly higher than all other publications (excluding don't know / none of these)

More dairy farmers regard *NZ Dairy Exporter* as a publication that provides valuable knowledge that helps them with their farm activities relative to other publications

Publications Providing Valuable Knowledge – Dairy Farmers Only⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: Dairy farmers, n = 195

2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)

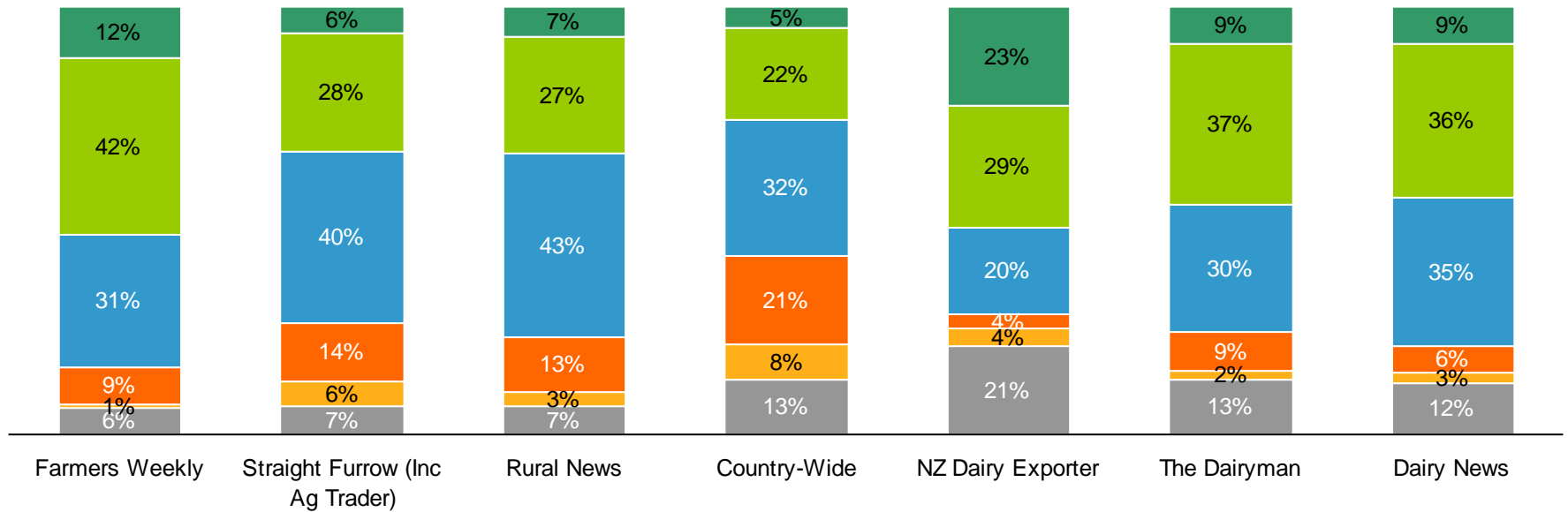
3. Significance tests calculated on mean scores using a 95% CI

NZ Dairy Exporter is the publication that dairy farmers most consider to be worth reading

Publications Worth Reading – Dairy Farmers Only⁽¹⁾⁽²⁾⁽³⁾

- 9 to 10
- 7 to 8
- 5 to 6
- 3 to 4
- 1 to 2
- Don't know

Dairy Farmers



Mean score

6.7

5.9

5.9

5.4

7.1

6.4

6.4

Significantly higher than all other non-dairy publications

Significantly lower than all other publications

Significantly higher than all other publications



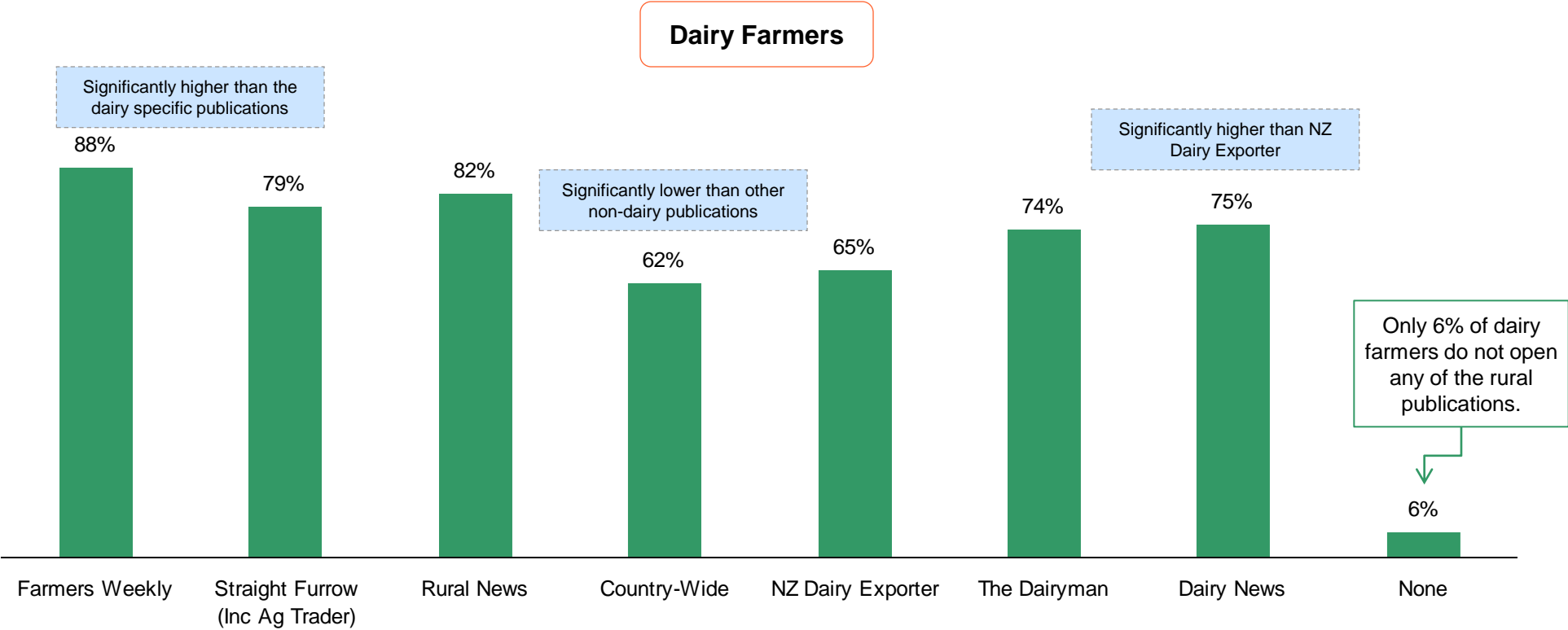
Notes: 1. Base: Dairy Farms, n = 195

2. In terms of being worthwhile reading, how worthwhile is [PUBLICATION]? (1-10 scale)

3. Significance tests calculated on mean scores using a 95% CI

More dairy farmers at least open and ‘flick through’ *Farmers Weekly* than any of the dairy specific publications

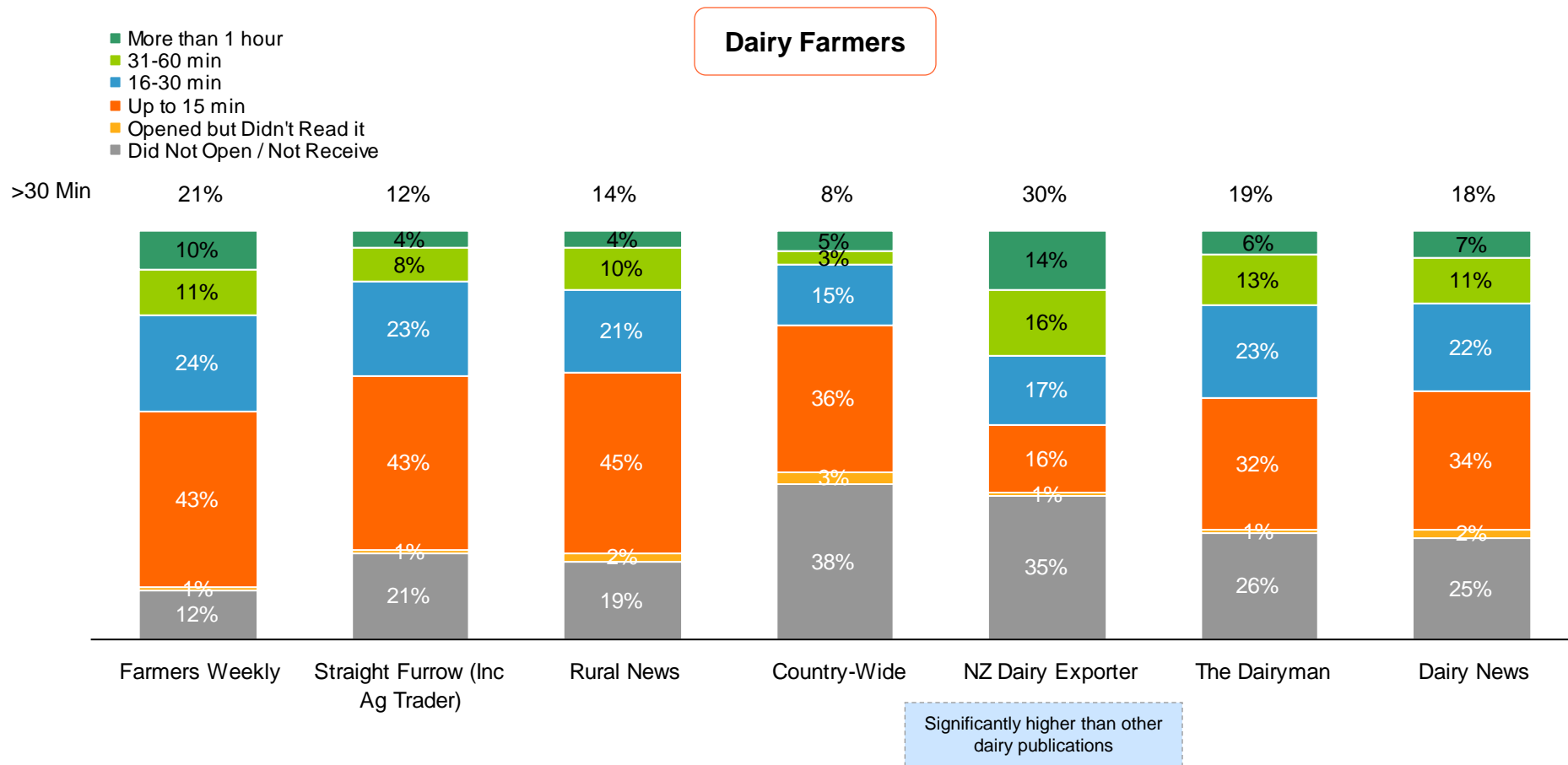
Publications at Least Opened in Last Month – Dairy Farmers Only⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: Dairy farms, n = 195
 2. In the last month, what of the following publications have you at least opened and ‘flicked’ through?
 3. Significance test based on 95% CI

A higher proportion of dairy farmers spend more than 30 minutes reading *NZ Dairy Exporter* than any other publication

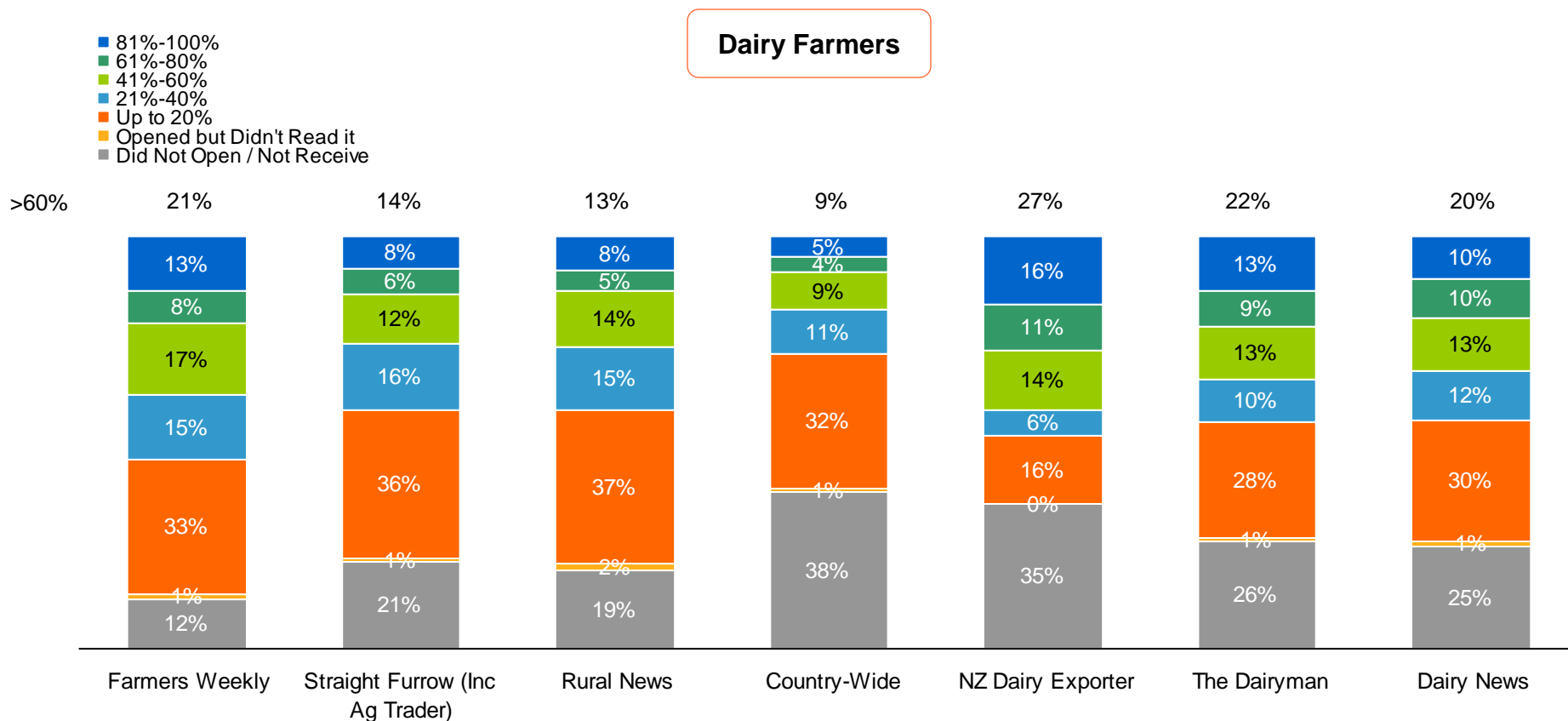
Time Spent Reading – Dairy Farmers Only⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: Dairy n = 195
 2. How much time have you typically spent reading each issue of [PUBLICATION] in the last month?
 3. Significance tests calculated on proportions using a 95% CI

The proportion of dairy farmers reading more than 60% of the dairy publications is similar

Proportion of Publication Read – Dairy Farmers Only⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: Dairy n = 195

2. And still thinking about the last month, about what percentage of each issue of [PUBLICATION] have you typically read?

3. Significance tests calculated on proportions using a 95% CI

Section 5

Farmers Excluding Dairy

Amongst farmers other than dairy, *Farmers Weekly* and *Country-Wide* have the highest readership results

Key Point Summary - Farmers Excluding Dairy

1

Country-Wide is regarded by more farmers, excluding dairy farmers, as the publication that has the best articles about animal health, research & development, farm management, pasture management and articles that inspire

2

Over half of non-dairy farmers identify *Farmers Weekly* as having the best articles about livestock markets & market analysis, a third recognise it for having the best farm news and agri-business articles and a quarter recognise it for having the best articles about real estate

3

Farmers Weekly and *Country-Wide* are rated more highly than *Straight Furrow* and *Rural News* for providing knowledge that helps with farming activities

4

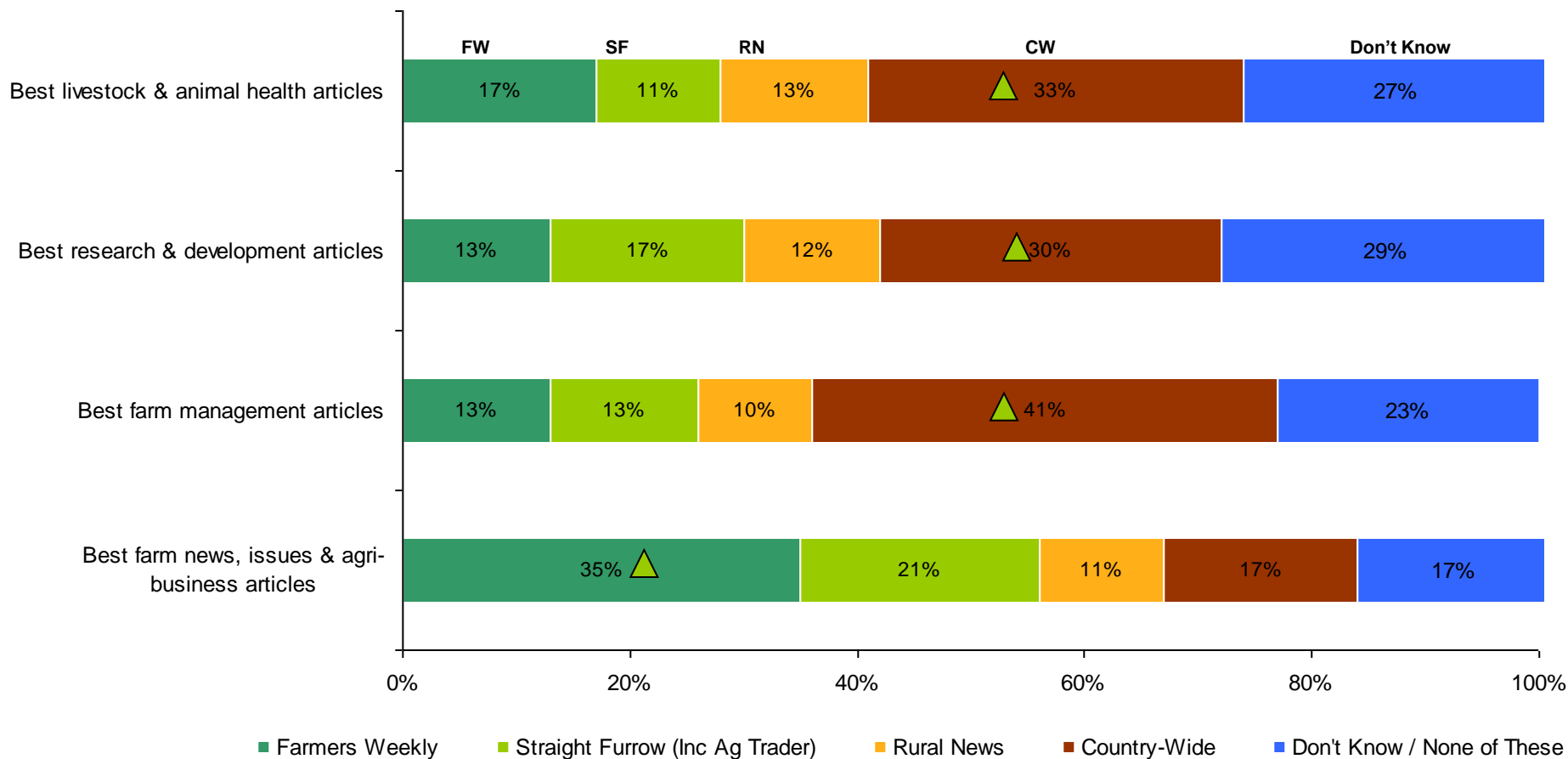
Farmers Weekly and *Country-Wide* are both highly regarded as worth reading and a higher proportion of non-dairy farmers spend more than 30 minutes reading *Farmers Weekly* relative to *Straight Furrow* or *Rural News*

5

Excluding dairy farmers, more farmers read more than 60% of each edition of *Farmers Weekly* than any other publication

Excluding dairy farmers, *Country-Wide* is identified by more farmers as having the best articles about livestock & animal health, research & development, and farm management

What Publications Are Most Strongly Recognised For – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: Farms excluding Dairy Farms, n = 255

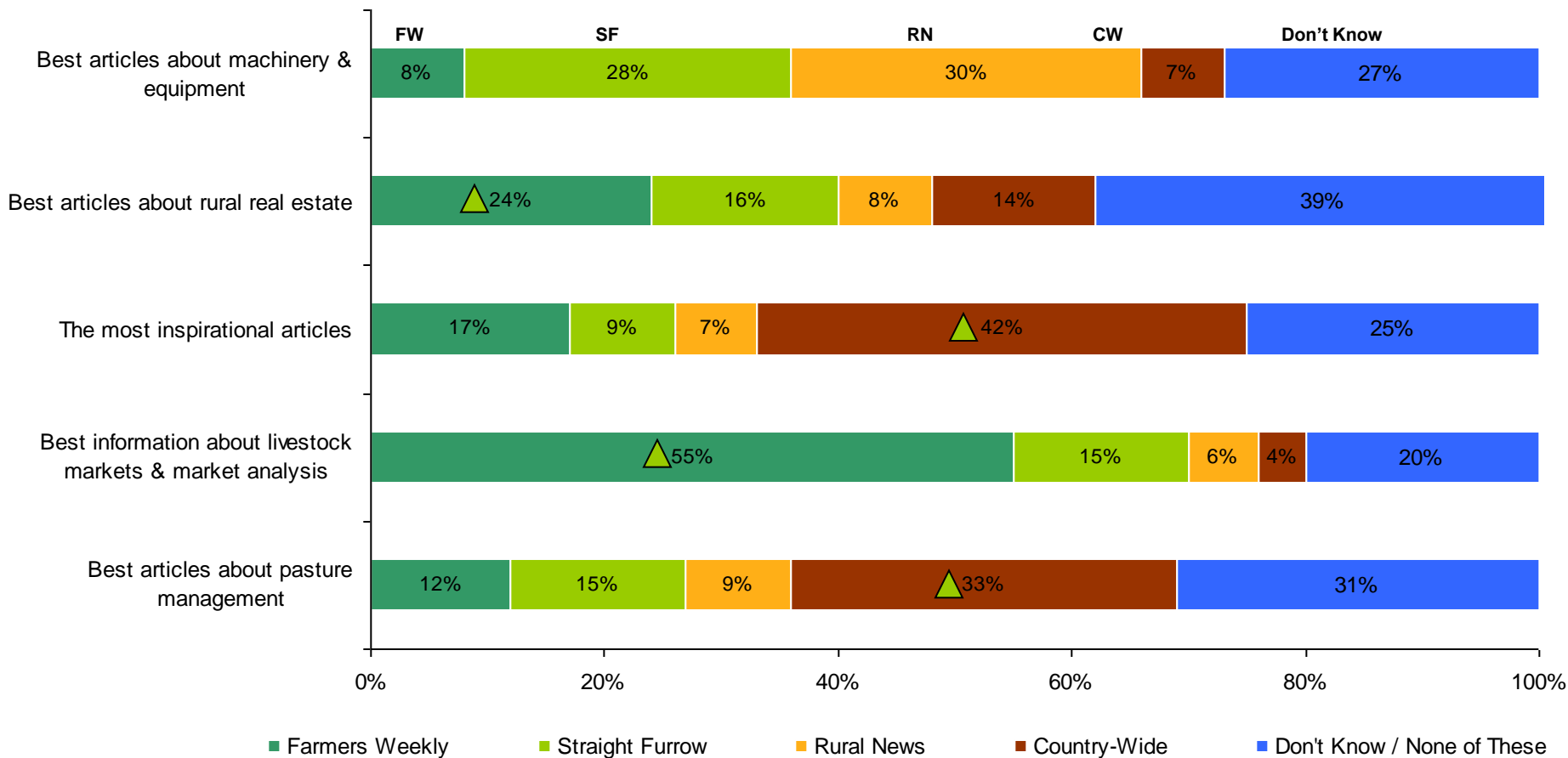
2. QNZX8 What one publication do you most associate with each of the following statements...?

3. Significance tests calculated on proportions using a 95% CI

▲ Significantly higher than all other publications (excluding don't know / none of these)

Country-Wide is also identified by more farmers for having the best articles about pasture management and articles that are inspirational, while *Farmers Weekly* is recognised by over half of all non-dairy farmers for having the best articles about livestock markets

What Publications Are Most Strongly Recognised For – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾



Notes: 1. Base: Farms excluding Dairy Farms, n = 255

2. QNZX8 What one publication do you most associate with each of the following statements...?

3. Significance tests calculated on proportions using a 95% CI

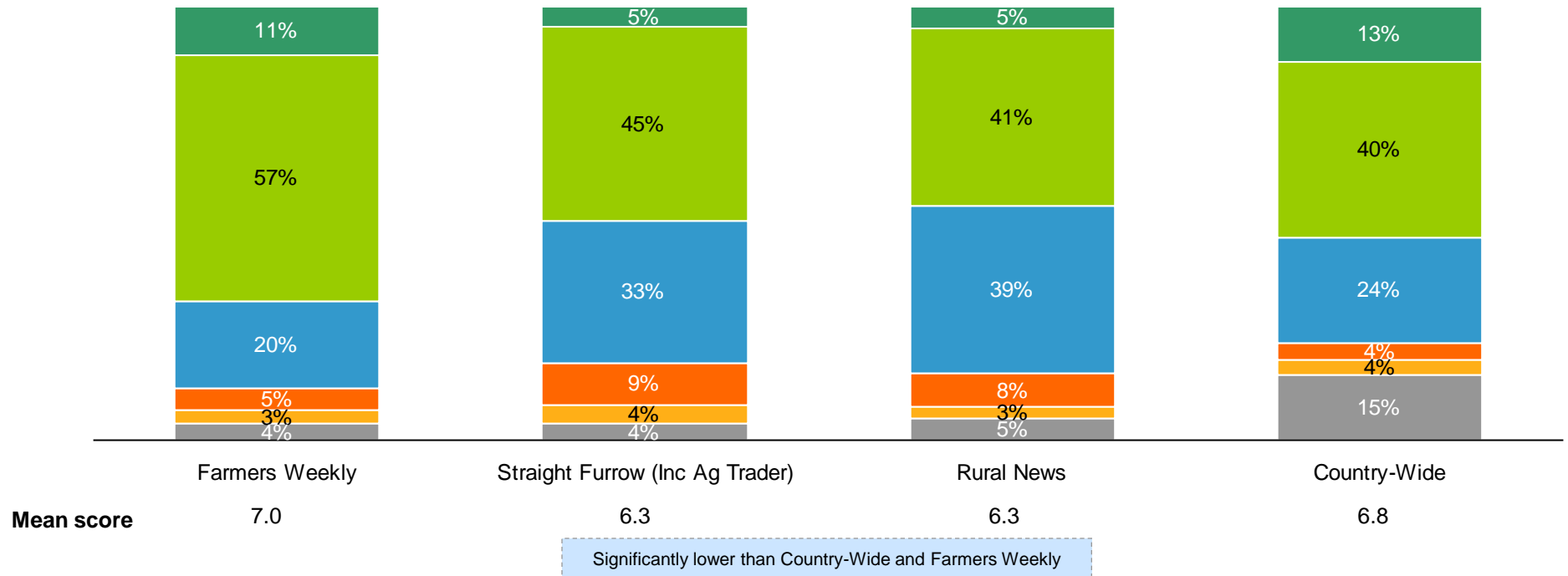
▲ Significantly higher than all other publications (excluding don't know / none of these)

Excluding dairy farmers, *Farmers Weekly* and *Country-Wide* are rated more highly than *Straight Furrow* and *Rural News* for providing knowledge that helps with farming activities

Publications Providing Knowledge – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾

- 9 to 10
- 7 to 8
- 5 to 6
- 3 to 4
- 1 to 2
- Don't know

Farmers Excluding Dairy



Notes: 1. Base: Farms excluding Dairy Farms, n = 255

2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)

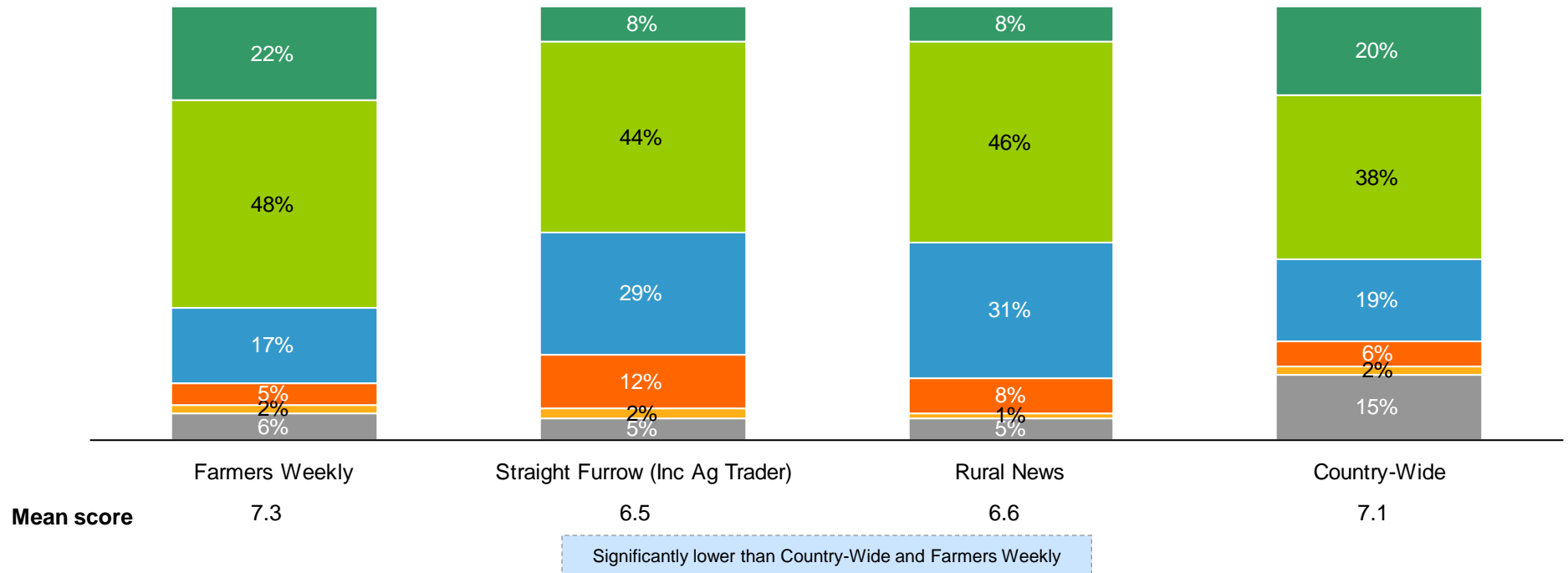
3. Significance tests calculated on mean scores using a 95% CI

Of all farmers excluding dairy, *Country-Wide* and *Farmers Weekly* are both rated as more worthwhile reading than *Straight Furrow* and *Rural News*

Publications Worth Reading – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾

- 9 to 10
- 7 to 8
- 5 to 6
- 3 to 4
- 1 to 2
- Don't know

Excluding Dairy Farmers

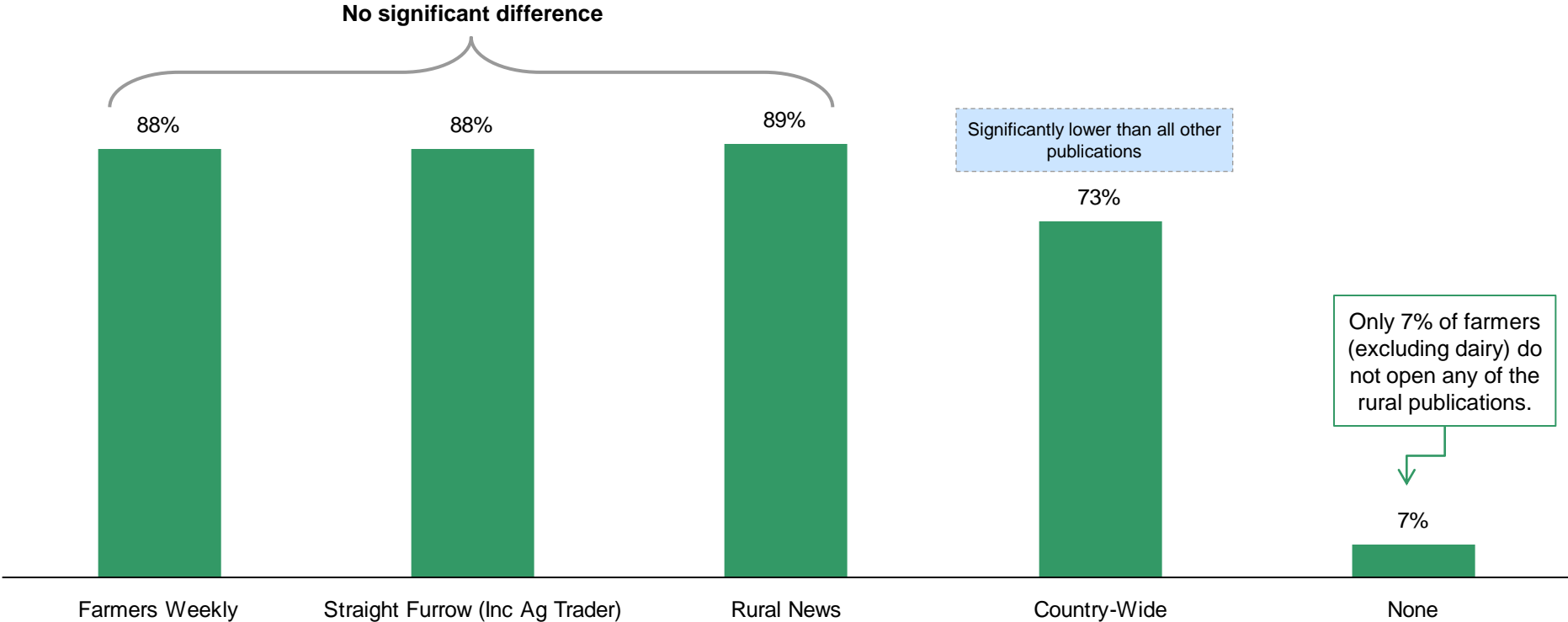


Notes: 1. Base: Farms excluding Dairy Farms, n = 255
 2. In terms of being worthwhile reading, how worthwhile is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

Excluding dairy farmers, there is not a significant difference in the proportion that at least open each publication delivered, with the exception of *Country-Wide*

Publications at Least Opened in Last Month – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾

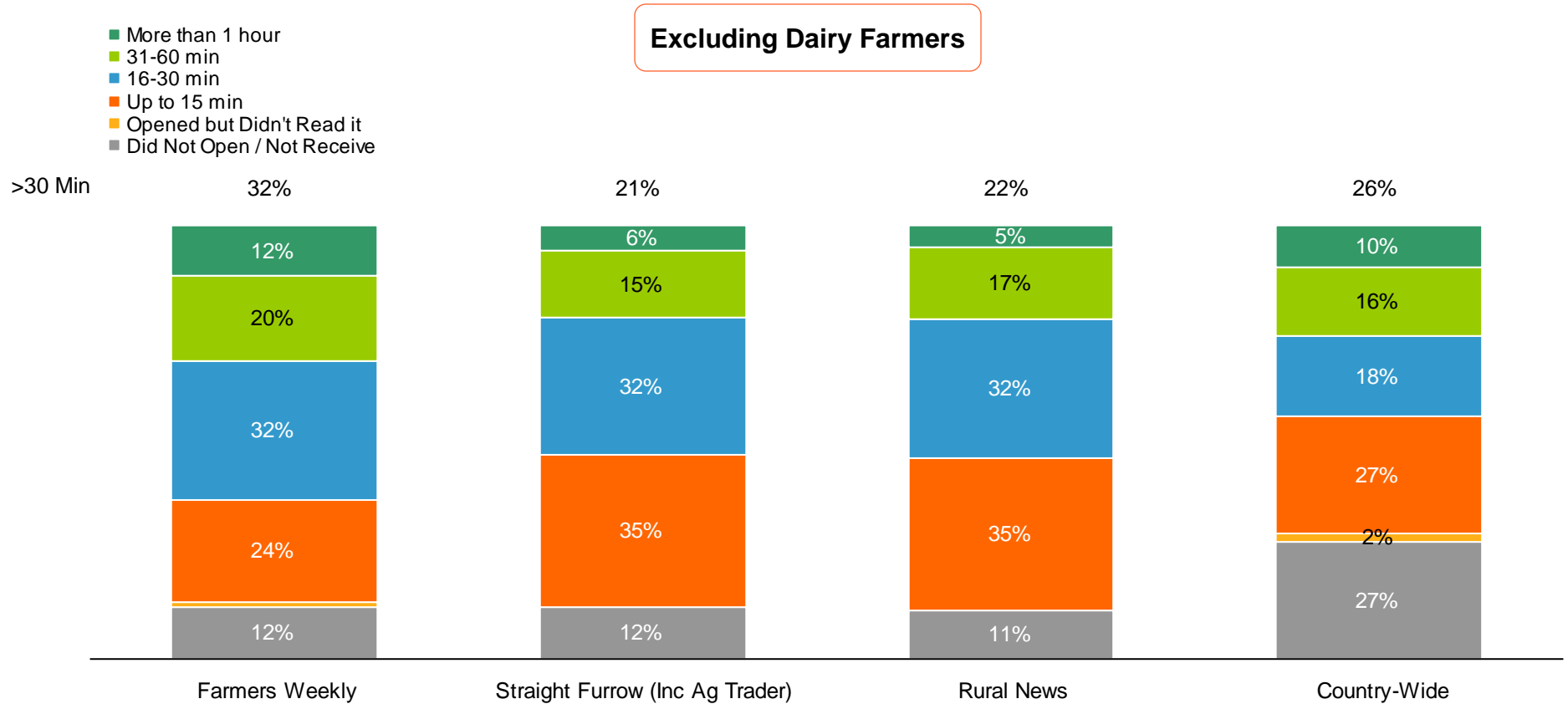
Excluding Dairy Farmers



Notes: 1. Base: Dairy farms, n = 255
2. In the last month, what of the following publications have you at least opened and 'flicked' through?
3. Significance test based on 95% CI

Of all farmers excluding dairy, a higher proportion spend more than 30 minutes reading *Farmers Weekly* than *Straight Furrow* or *Rural News*

Time Spent Reading – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾



Significantly higher than Straight Furrow and Rural News



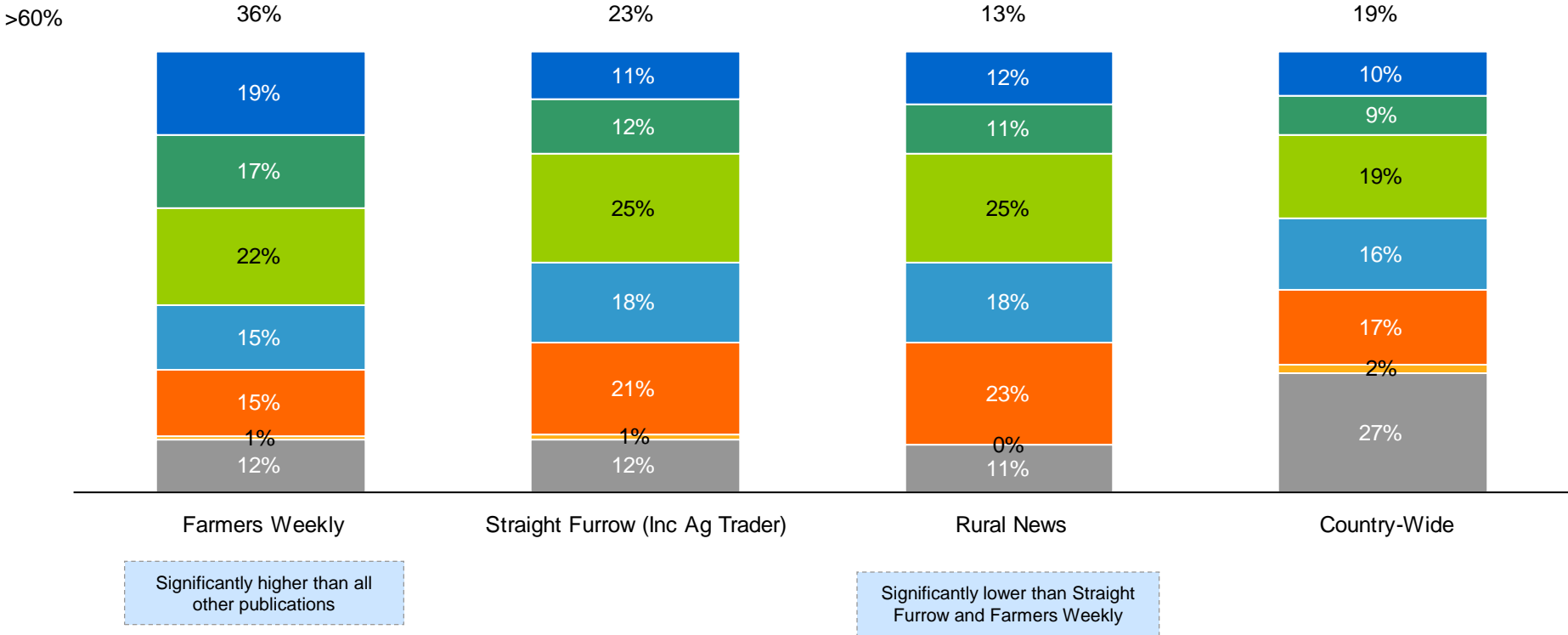
Notes: 1. Base: Excluding Dairy n = 255
 2. How much time have you typically spent reading each issue of [PUBLICATION] in the last month
 3. Significance tests calculated on proportions using a 95% CI

Of all farmers excluding dairy, a higher proportion read more than 60% of *Farmers Weekly* than other publications

Proportion of Publication Read – Excluding Dairy Farmers⁽¹⁾⁽²⁾⁽³⁾

Excluding Dairy Farmers

- 81%-100%
- 61%-80%
- 41%-60%
- 21%-40%
- Up to 20%
- Opened but Didn't Read it
- Did Not Open / Not Receive



tns[™] Notes: 1. Base: Excluding Dairy n = 255
 2. And still thinking about the last month, about what percentage of each issue of [PUBLICATION] have you typically read
 3. Significance tests calculated on proportions using a 95% CI

Section 6

Technical Information & About TNS

Methodology & Background

- TNS New Zealand and Conversa Global merged in 2007 to form New Zealand's largest custom research company. The New Zealand office based in Auckland is part of TNS Global, the largest customised market research organisation in the world, with offices in over 80 countries. In 2008 TNS became part of WPP, one of the world's largest communications services groups. The group includes leading companies in advertising (e.g. JWT, Ogilvy and Mather, Y&R), media planning and buying (e.g. Mediacom), PR, branding and identity, below-the-line marketing and information, insight and consultancy. The organisation employs 110,000 people working in 2,000 offices
- As a full service research-based business consultancy, TNS combines the global reach and access to leading-edge intellectual property of TNS, and the commercial, marketing, statistical and research expertise and processes of Conversa Global. We use statistics, market research, economic and financial analysis and commercial skills and experience to solve market facing problems and track market performance. Our clients include New Zealand's largest and most successful organisations
- Research for the NZX Agri rural publication readership was undertaken between 6th and 14th December 2011 as part of a quarterly omnibus survey of agri-businesses in New Zealand. The omnibus survey interviewed 450 farmers
- Slide #8 has been included from the October 2011 survey and slides #9 & 10 have been included from September 2010 as not all questions are asked in each round of the survey
- Interviews were conducted by telephone using Computer Assisted Telephone Interviewing (CATI)