



TNS Independent Rural Readership Survey

July 2011

tns

Contact Details

Address

Physical address:

Level 1, 7 Falcon Street,
Parnell
Auckland 1052
New Zealand

Postal address:

PO Box 6621, Wellesley Street
Auckland 1141
New Zealand

Contact

David Mustard

Senior Consultant
t: +64 9 366 6880
f: +64 9 307 3575
e: david.mustard@tnsglobal.com

Robert McKibbin

Consultant
t: +64 9 366 6880
f: +64 9 307 3575
e: robert.mckibbin@tnsglobal.com



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Section 1

Introduction



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

Situation

- NZX Agri has a number of widely recognised regular and specialised publications that it provides for the rural sector, the most significant being *Farmers Weekly*, *Country-Wide* and *NZ Dairy Exporter*
- As part of its own performance monitoring, NZX Agri has implemented a regime of regularly surveying farmers to understand their reading preferences and habits
- Apart from assisting NZX Agri to ensure that its publications are meeting the needs of their target audiences, outputs from the study are also designed to assist advertisers determine what publications will be most effective as a communication channel for any given message or sub-set of the agri-business market

The latest research indicates that the NZX publications retain a strong position in the market for the value that they add and for readership

Key Point Summary

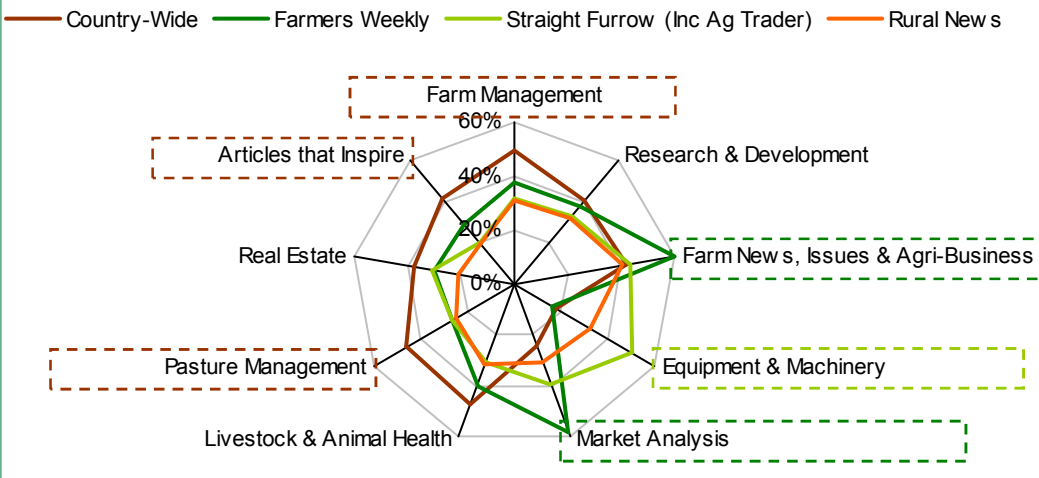
- Across all farmers, farming newspapers and magazines are the most frequently used source of farming information
- Only 3% of all farmers do not open a rural publication each month
- *Farmers Weekly* remains the non-dairy publication most valued for providing knowledge and for being worth reading
- *Farmers Weekly* is the non-dairy publication that has the largest proportion of farmers who spend more than 30 minutes reading and also has the largest proportion of farmers who read more than 60% of the publication
- *NZ Dairy Exporter* is valued by dairy farmers for providing knowledge ahead of all other publications measured, except for *Farmers Weekly*
- *NZ Dairy Exporter* is the publication that has the largest proportion of dairy farmers who spend more than 30 minutes reading, other than *Farmers Weekly*
- The proportion of dairy farmers who read more than 60% of publications is similar across all major dairy publications; *NZ Dairy Exporter*, *The Dairyman* and *Dairy News*

Readership Dashboard; Key results at a glance

Key Point Review

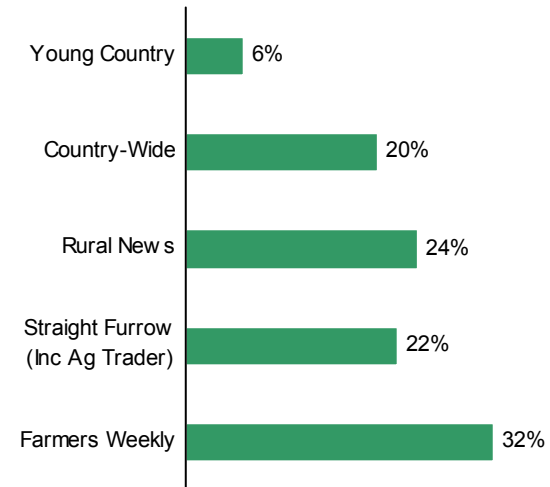
Topics of importance – all farmers:

Excluding dairy publications, across all farmers *NZ Farmers Weekly* is the publication that is most strongly associated with market information and analysis and with farm news and agri-business issues. *Country-Wide* is the publication that farmers most associate with good farm management articles, pasture management and articles that inspire. *Straight Furrow* is strongly associated with equipment and machinery.

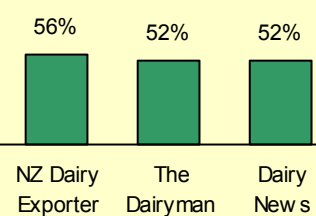


Readership – all farmers:

Excluding the dairy publications, more farmers read >60% of *Farmers Weekly* than any of the other publications; *Straight Furrow*, *Rural News*, *Country-Wide* and *Young Country*.



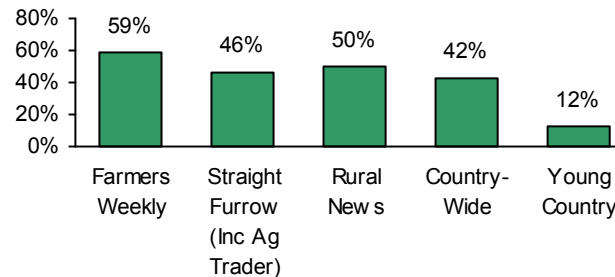
Dairy farmers only



Worth reading – all farmers:

59% of all farmers rate *NZ Farmers Weekly* a 7 or more out of 10 as being worthwhile reading. 56% of dairy farmers rate *NZ Dairy Exporter* a 7 or more as being worthwhile reading.

Notes: 1. Base: All farms, n = 450;
2. Base: Dairy, n = 171;
3. Base: Excluding Dairy n = 279



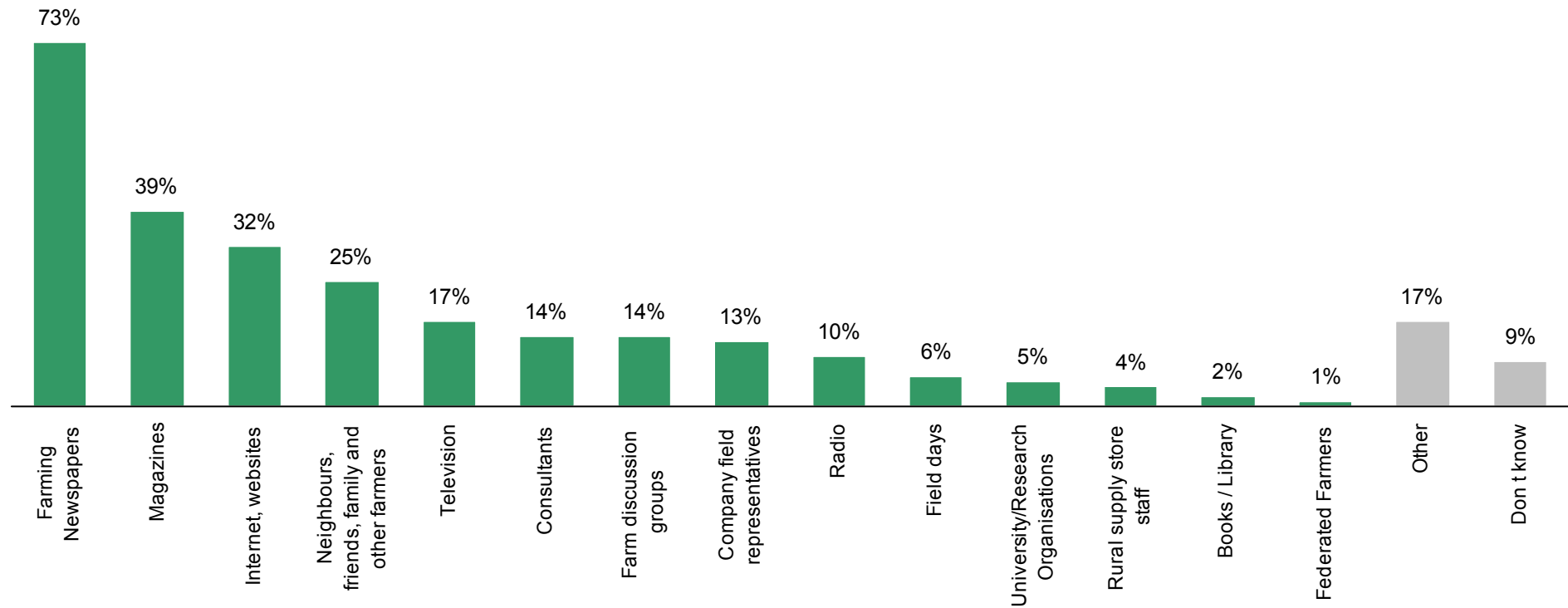
Section 2

Value in Rural Publications



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

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



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%

Analysis found that 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

Rank	Attribute	All Farmers
1	Good farm news, issues and agri-business articles	All Farmers
2	Good farm management articles	
3	Good research & development articles	
4	Good livestock & animal health articles	
5	Good pasture management articles	
6	Good market information and analysis	
7	Articles that inspire	
8	Good articles about rural real estate	
9	Good articles about machinery and farm equipment	

High Importance

Medium Importance

Low Importance



Notes: 1. Base: All Farms, n = 450 – September 2010

Repeating the analysis for dairy farmers and all others separately reveals little difference in the importance of the various attributes that farmers value in rural publications

Rank	Dairy Farmers Attribute	All Other Farmers 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

Section 3

All Farmers



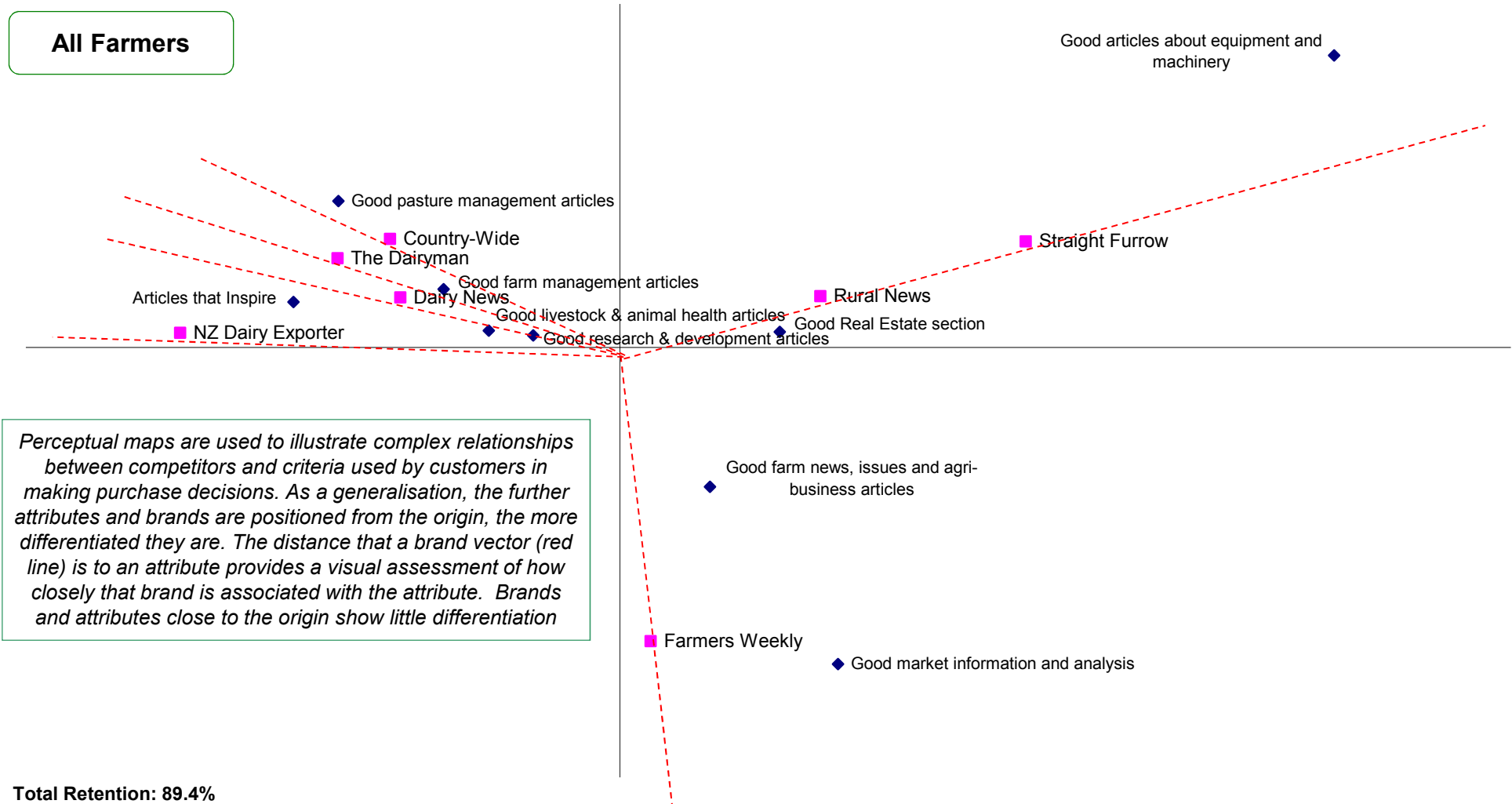
All Farmers - Summary

■ All Farmers

- *Country-Wide* leads for recognition of quality articles about:
 - Farm management
 - Pasture management, and
 - For having articles that inspire
- *NZ Farmers Weekly* leads for recognition of quality articles about:
 - Farm news, issues and agri-business, and
 - Market analysis
- *Farmers Weekly* scores better than the other non-dairy publications in the survey; *Country-Wide*, *Rural News*, *Straight Furrow* and *Young Country* in terms of providing knowledge
- Excluding dairy publications,
 - *Farmers Weekly* is considered to be the most worthwhile publication to read
 - More farmers read >60% of *Farmers Weekly* than any of the other publications
 - More farmers spend more than 30 minutes reading *Farmers Weekly* than they do *Rural News*, *Straight Furrow*, *Country-Wide* or *Young Country*
- Only about 3% of farmers do not open any of the rural publications that they receive

The three dairy publications and *Country-Wide* are positioned on similar attributes. *Rural News* and *Straight Furrow* are seen as similar. *NZ Farmers Weekly* occupies a unique space being strongly positioned on farm news and market analysis

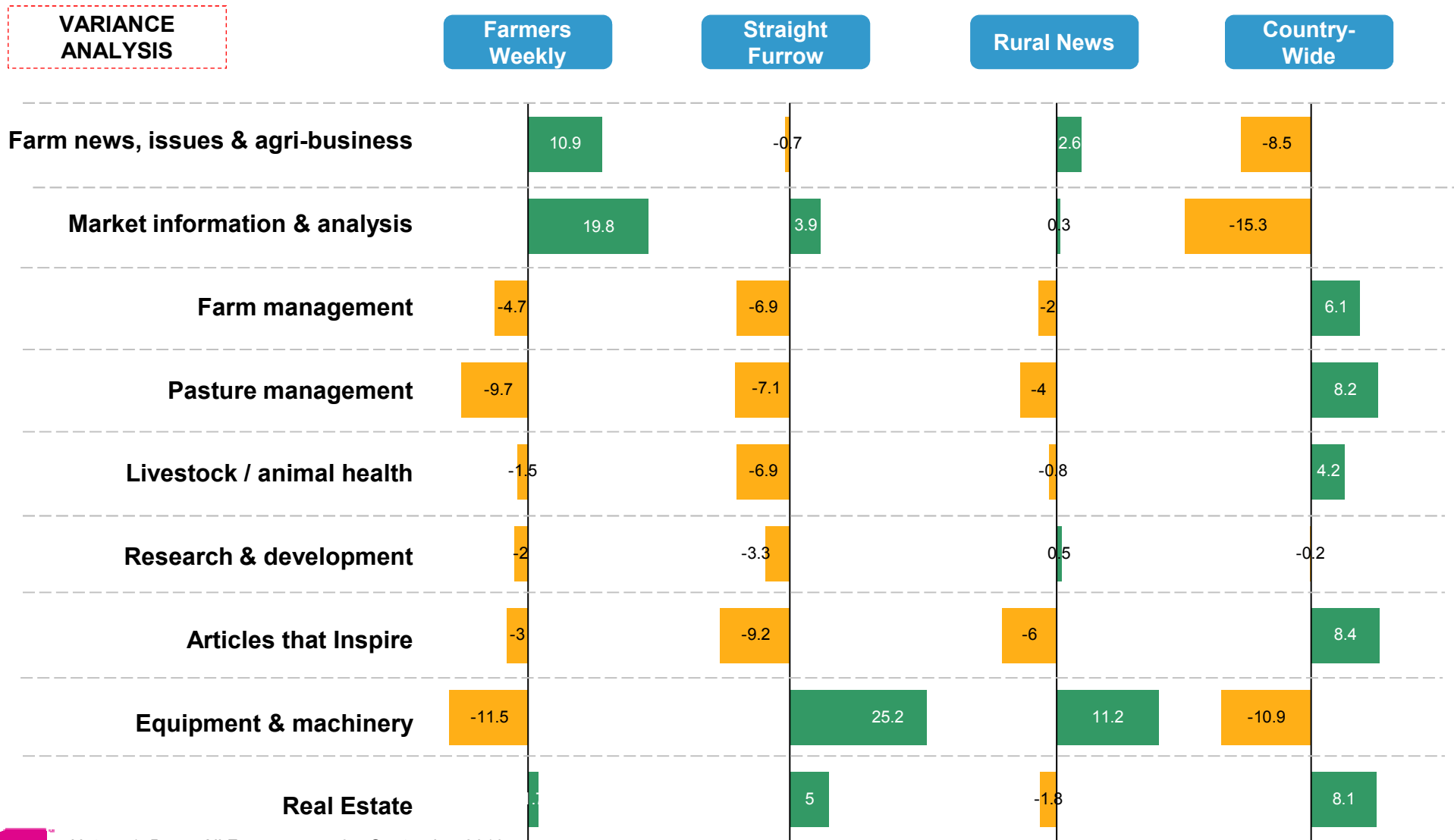
Perceptual Map (All Farmers)⁽¹⁾



Notes: 1. Base: All Farms, n = 450 – September 2010

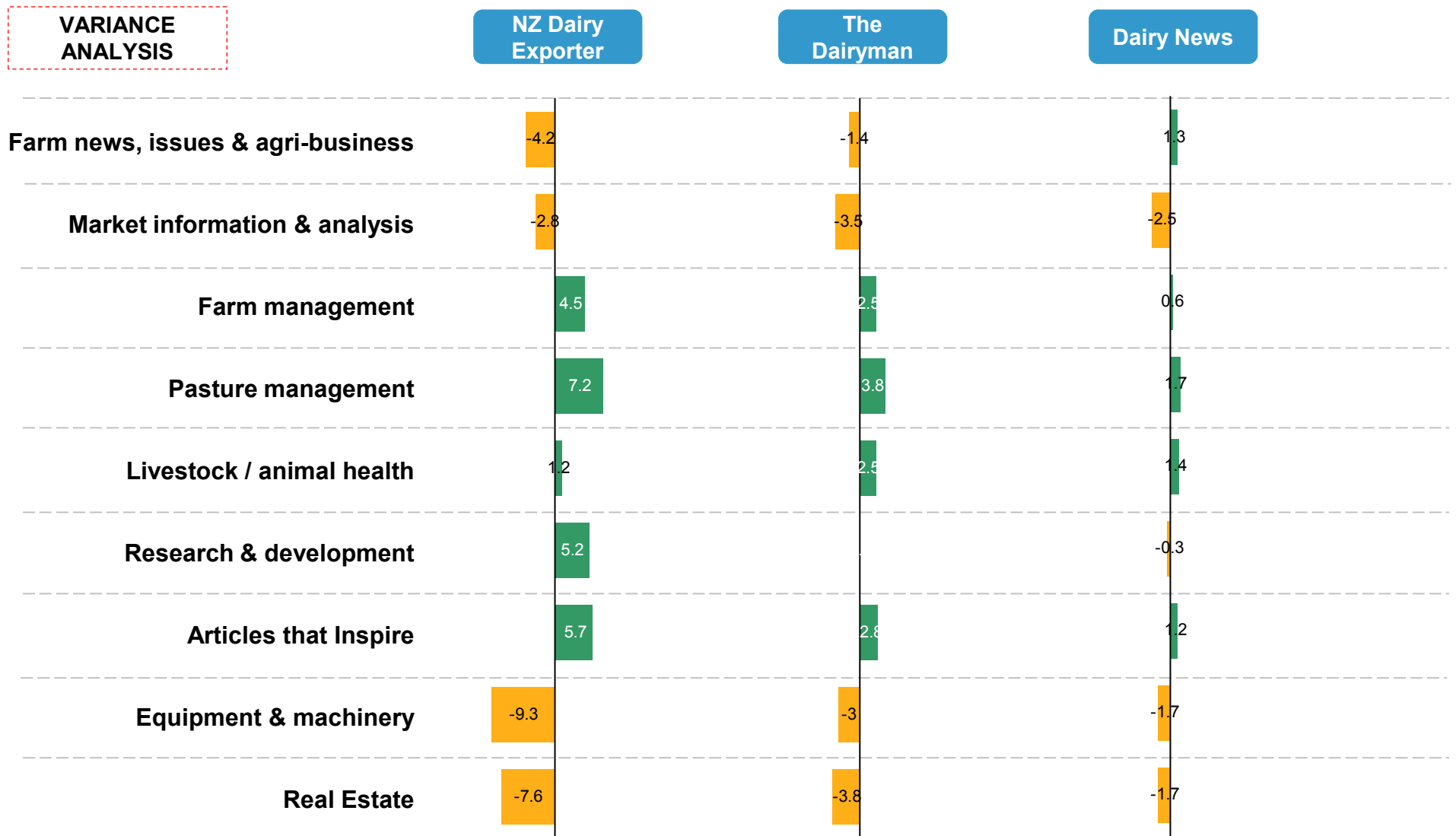


NZ Farmers Weekly has a relative strength with market analysis and *Straight Furrow* and *Rural News* with articles about machinery. *Country-Wide* is strongly differentiated on farm management type articles, pasture management, articles that inspire and real estate



Notes: 1. Base: All Farms, n = 450 – September 2010

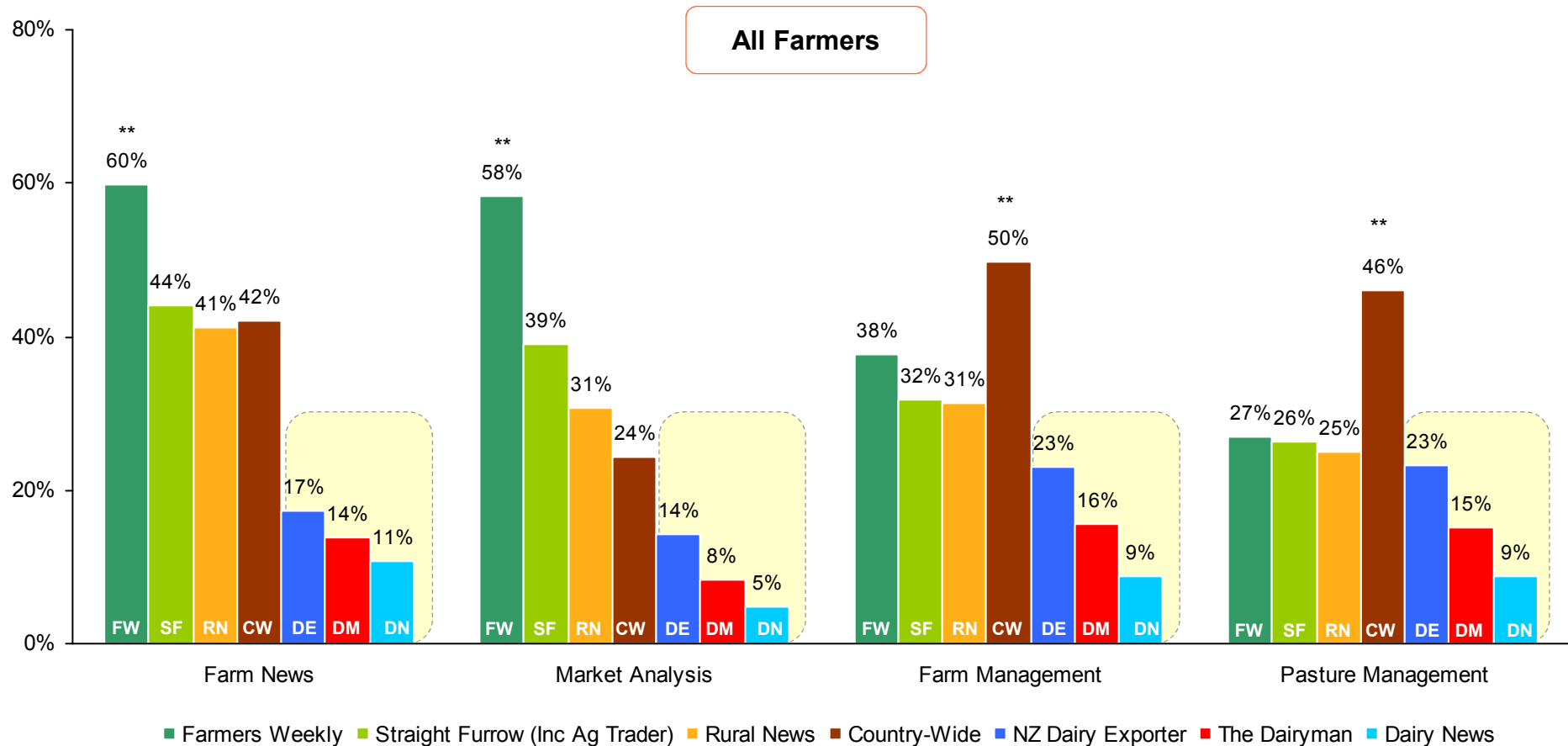
NZ Dairy Exporter is the only dairy publication with a reasonably differentiated profile



Notes: 1. Base: All Farms, n = 450 – September 2010

NZ Farmers Weekly is the most strongly recognised publication for farm news and market analysis and *Country-Wide* for farm management and pasture management⁽³⁾

Article Type and Publication Association – All Farmers⁽¹⁾⁽²⁾



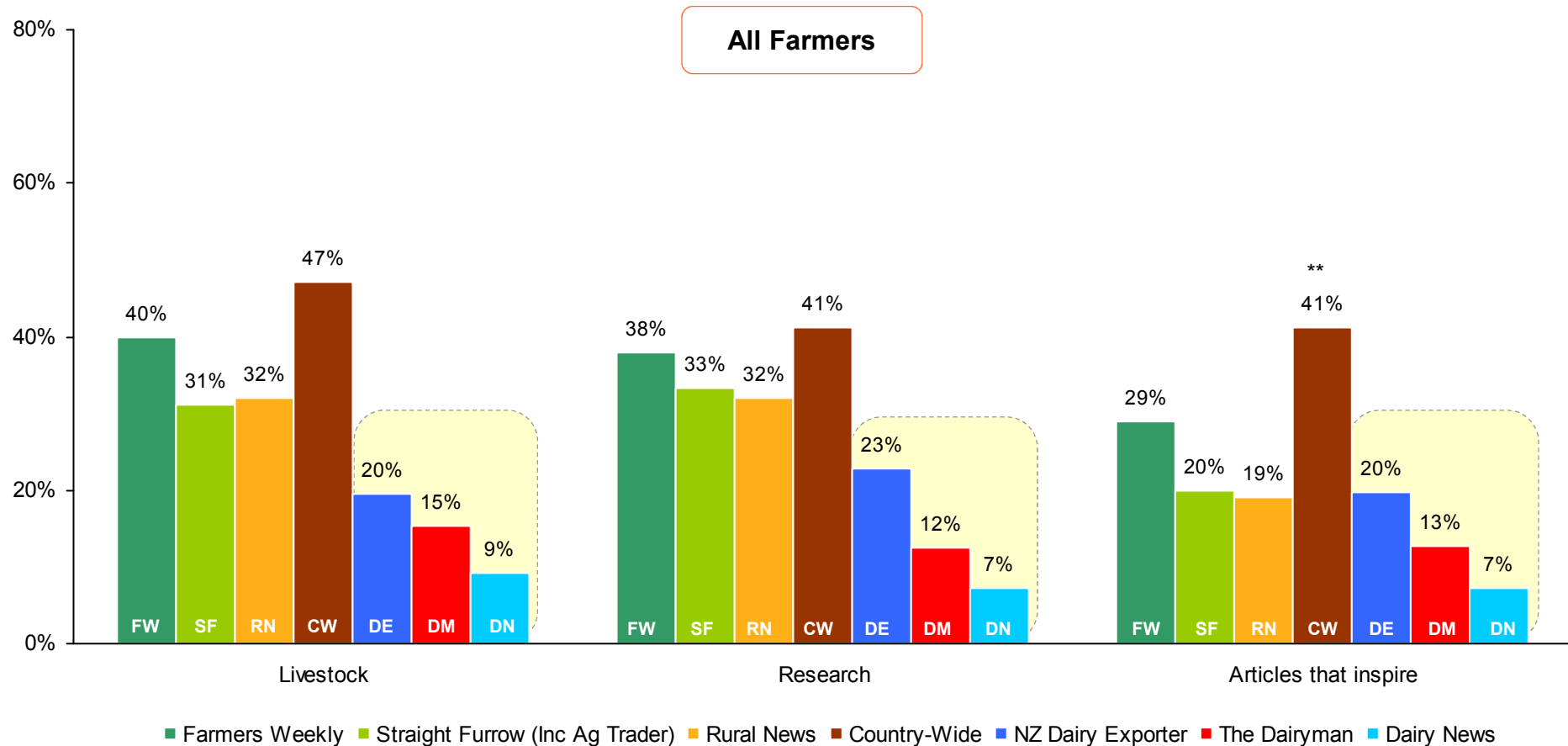
Asked of Dairy Farmers only⁽¹⁾



- Notes: 1. Base: All farms, n = 450; Dairy n = 161; September 2010
 2. QCW1 What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Country-Wide is also the most strongly recognised publication for articles that inspire⁽³⁾

Article Type and Publication Association – All Farmers⁽¹⁾⁽²⁾



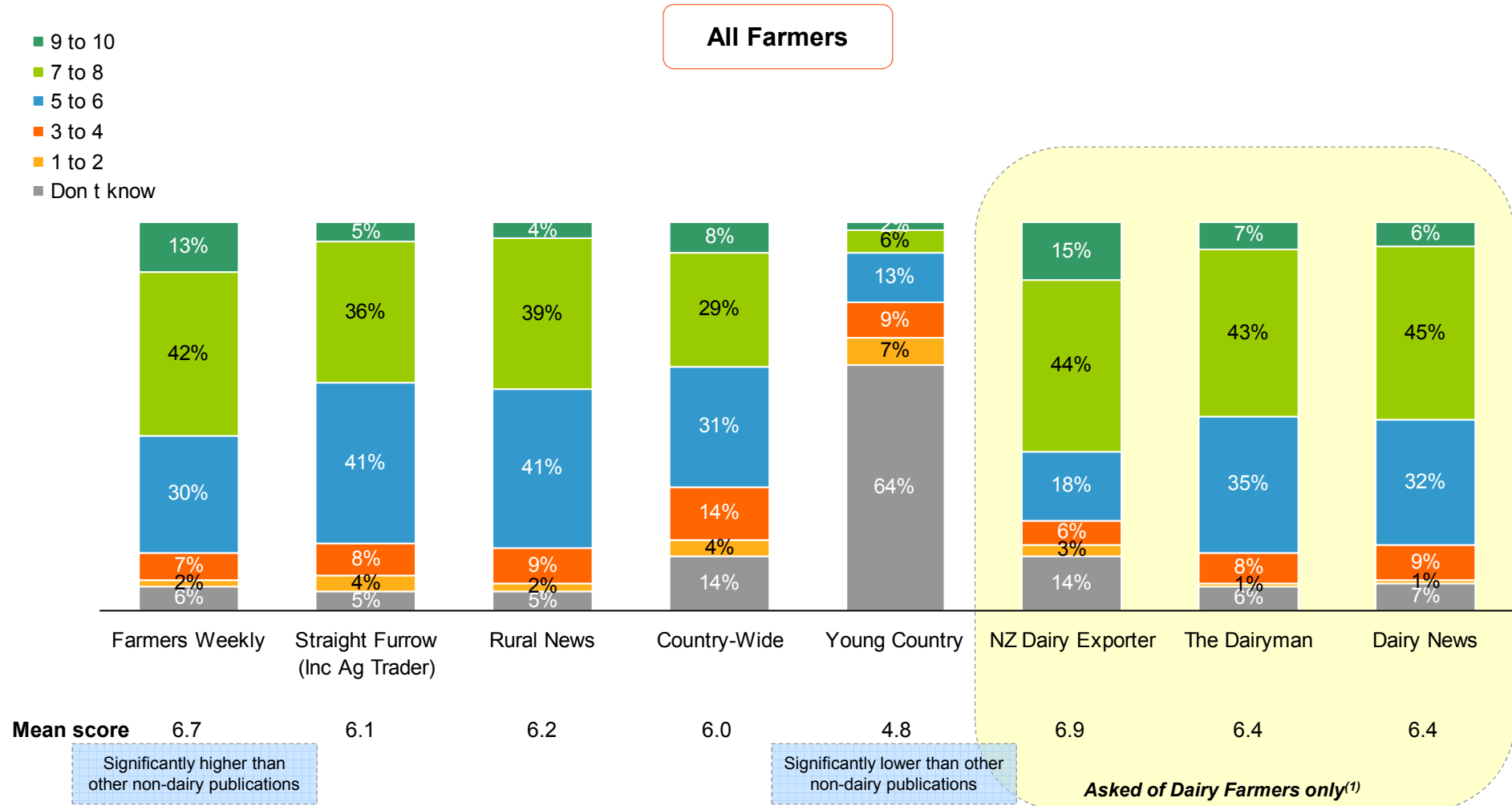
Asked of Dairy Farmers only⁽²⁾



Notes: 1. Base: All farms, n = 450; September 2010
 2. QCW1 What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Excluding the dairy publications, *Farmers Weekly* is being rated more highly than the other publications for providing knowledge⁽³⁾

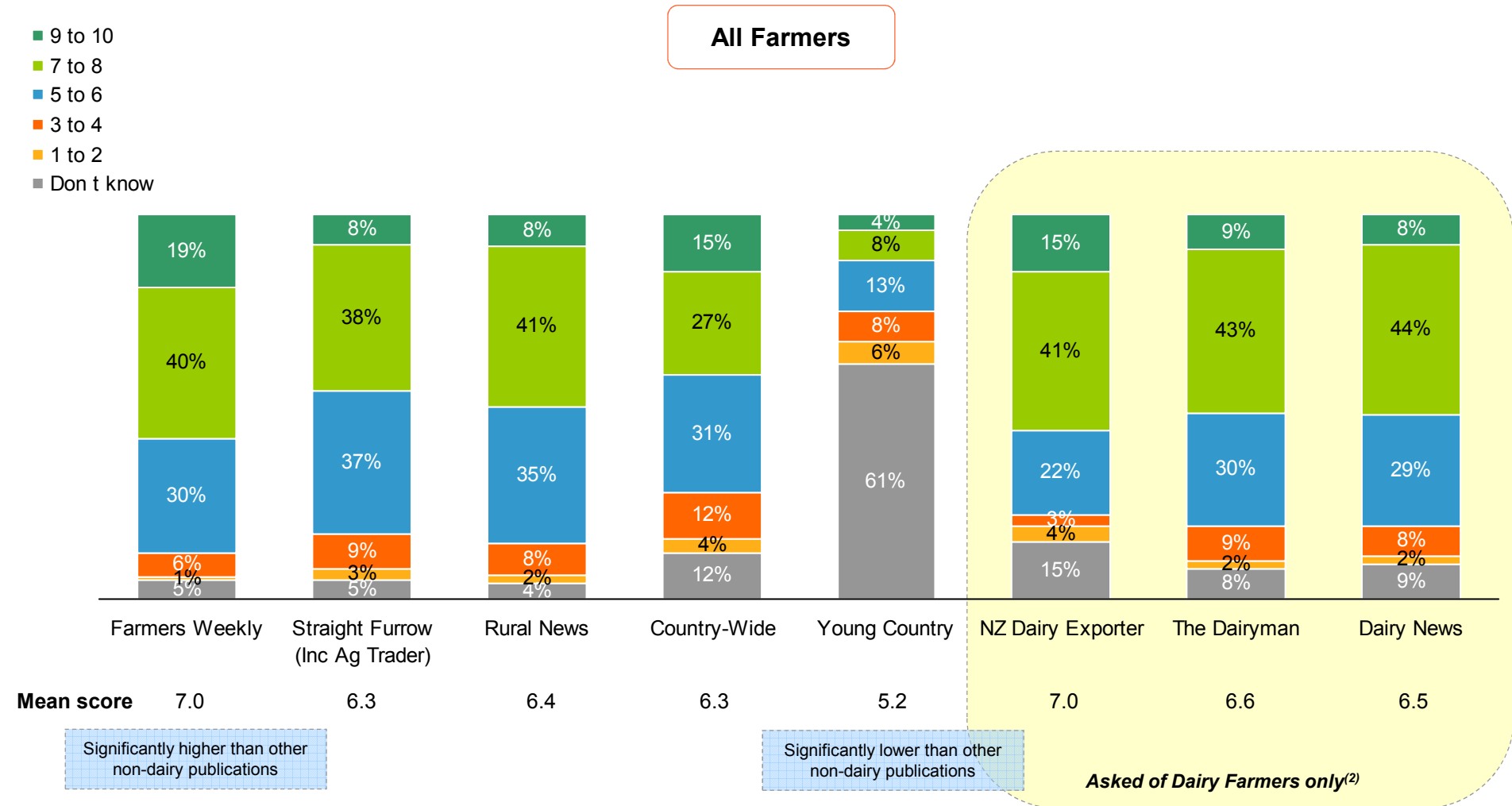
Publications Providing Knowledge – All Farmers⁽¹⁾⁽²⁾



Notes: 1. Base: All farms, n = 450; Dairy Farms, n = 171
 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⁽³⁾

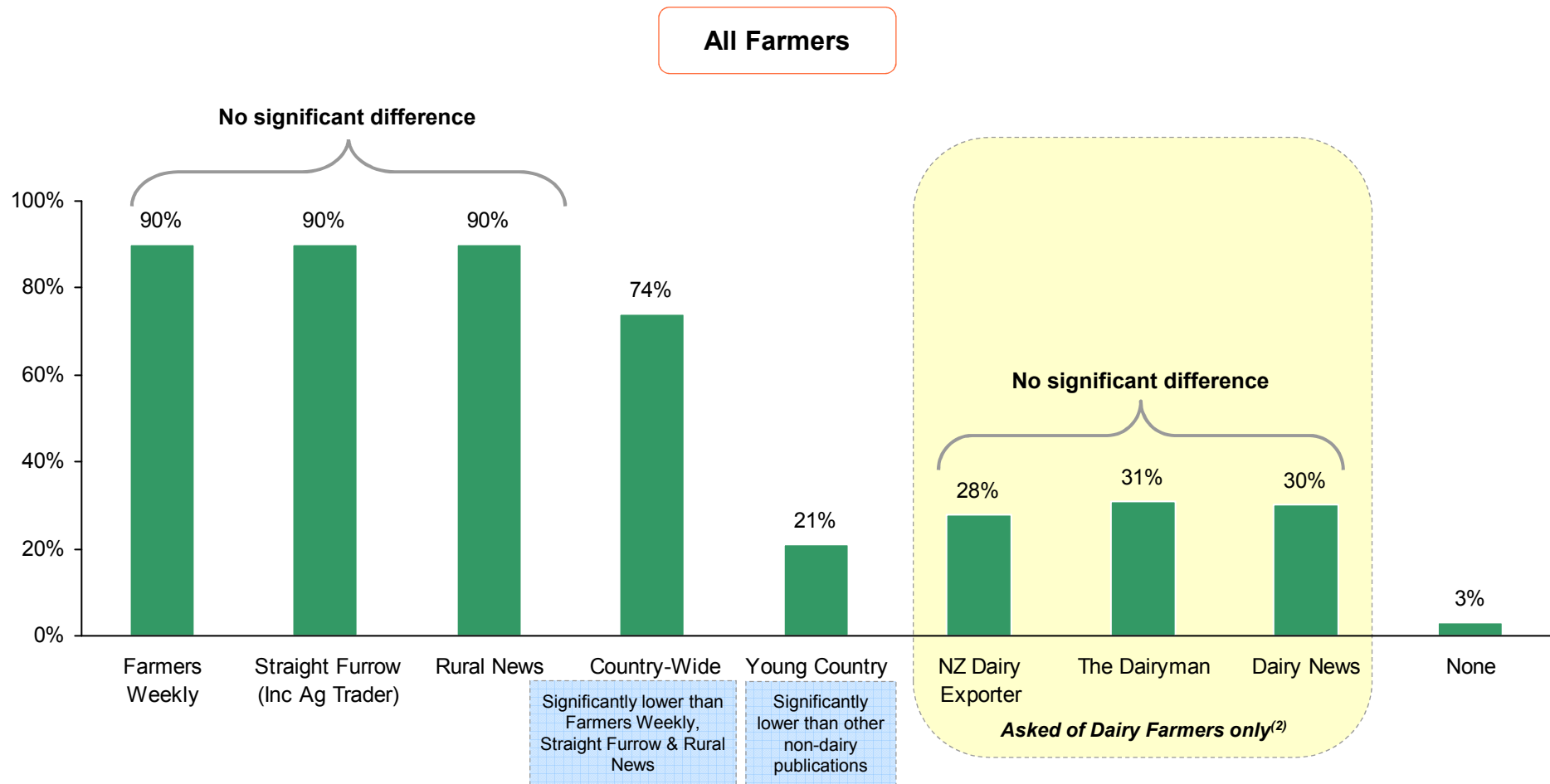
Publications Worth Reading – All Farmers⁽¹⁾⁽²⁾



Notes: 1. Base: All farms, n = 450; Dairy n= 171
 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 by a similar proportion. Only 3% of farmers do not open any of the rural publications⁽³⁾

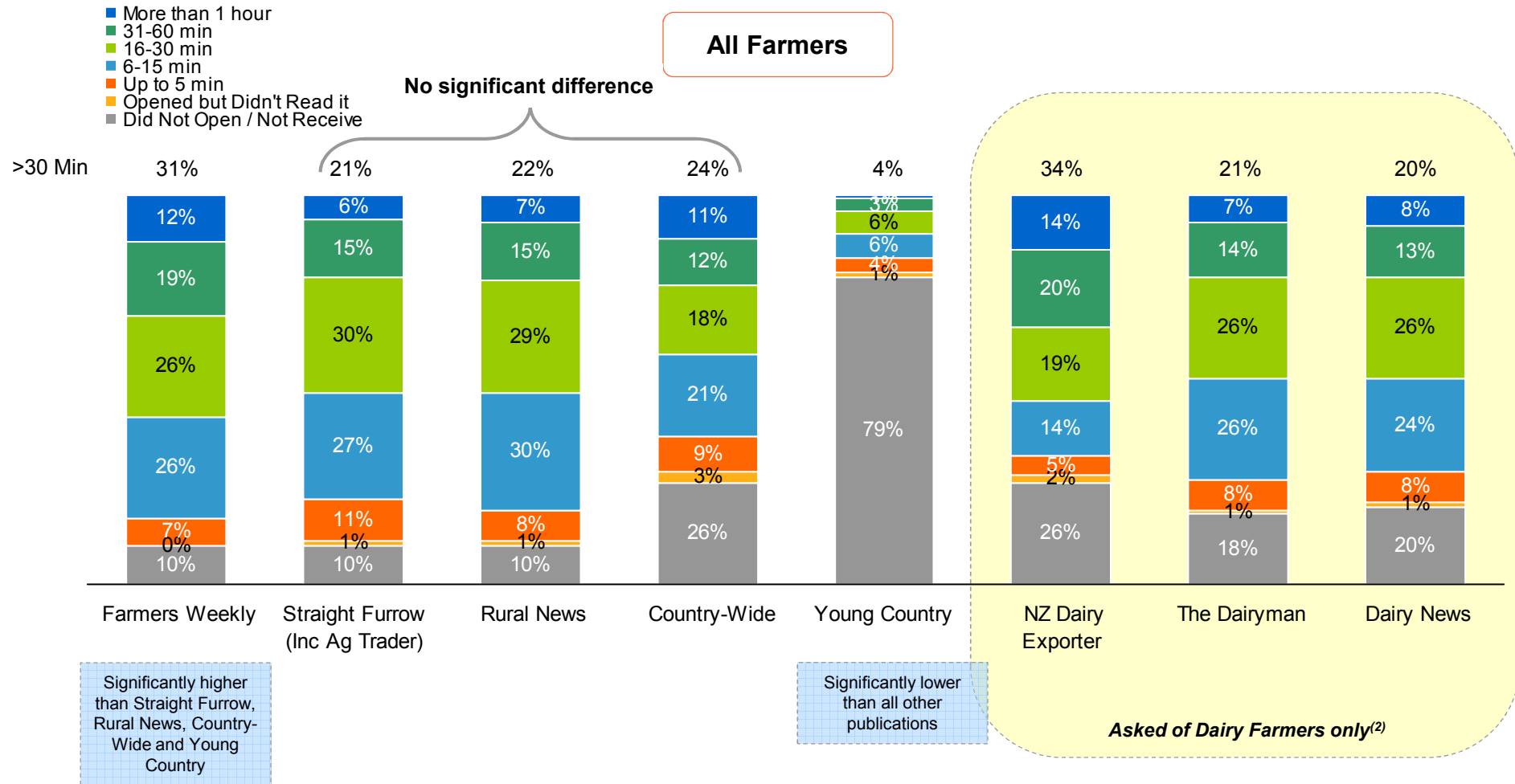
Publications at Least Opened in Last Month – All Farmers⁽¹⁾⁽²⁾



Notes: 1. Base: All Farmers, n = 450; Dairy n = 171
 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, more farmers spend more than 30 minutes reading *Farmers Weekly* than they do *Straight Furrow*, *Rural News*, *Country-Wide* or *Young Country*⁽³⁾

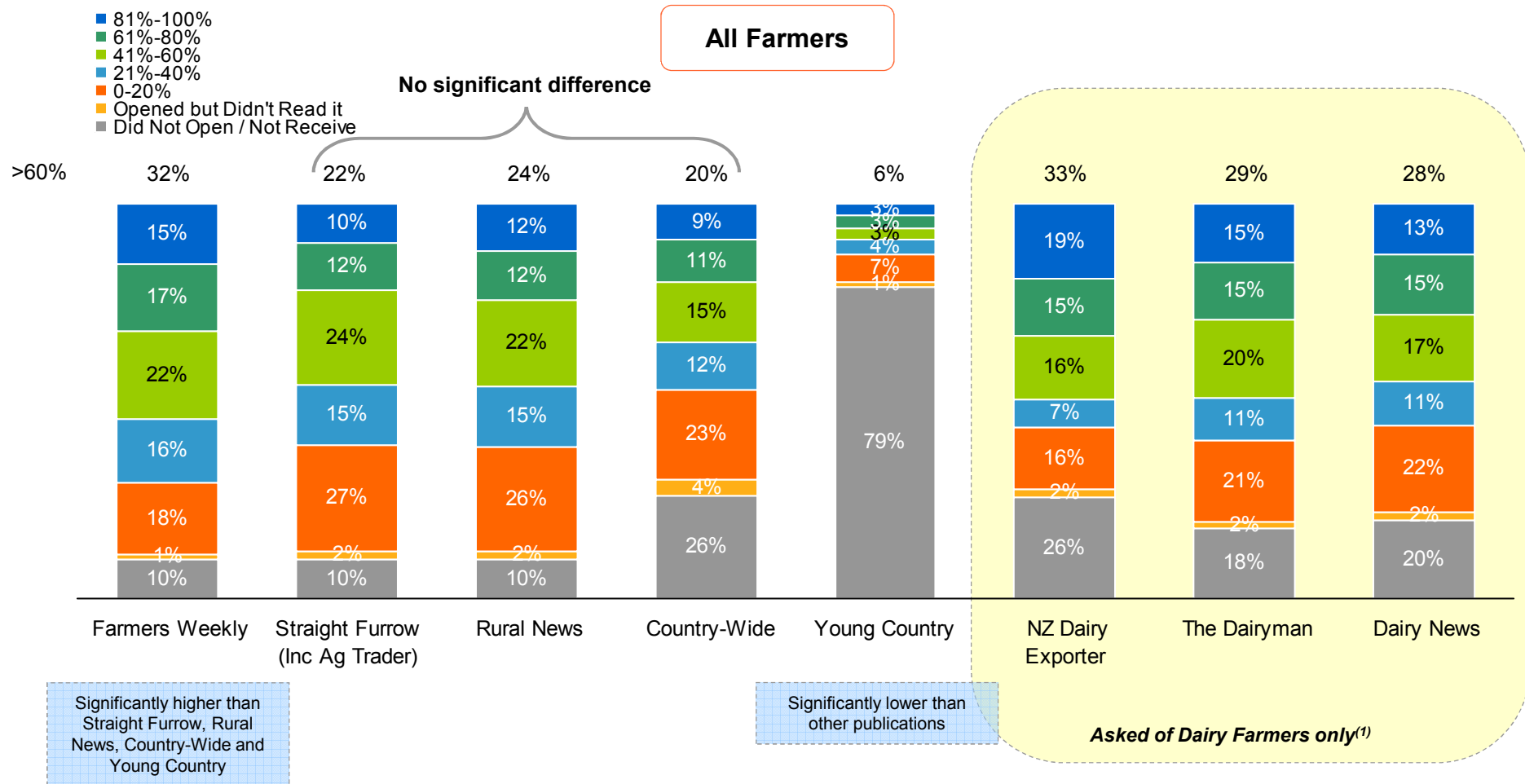
Time Spent Reading – All Farmers⁽¹⁾⁽²⁾



Notes: 1. Base: All farms, n = 450; Dairy n = 171
 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, more farmers read >60% of *Farmers Weekly* than any other publication; *Straight Furrow*, *Rural News*, *Country-Wide* or *Young Country*⁽³⁾

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



Notes: 1. Base: All farms, n = 450; Dairy n = 171
 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

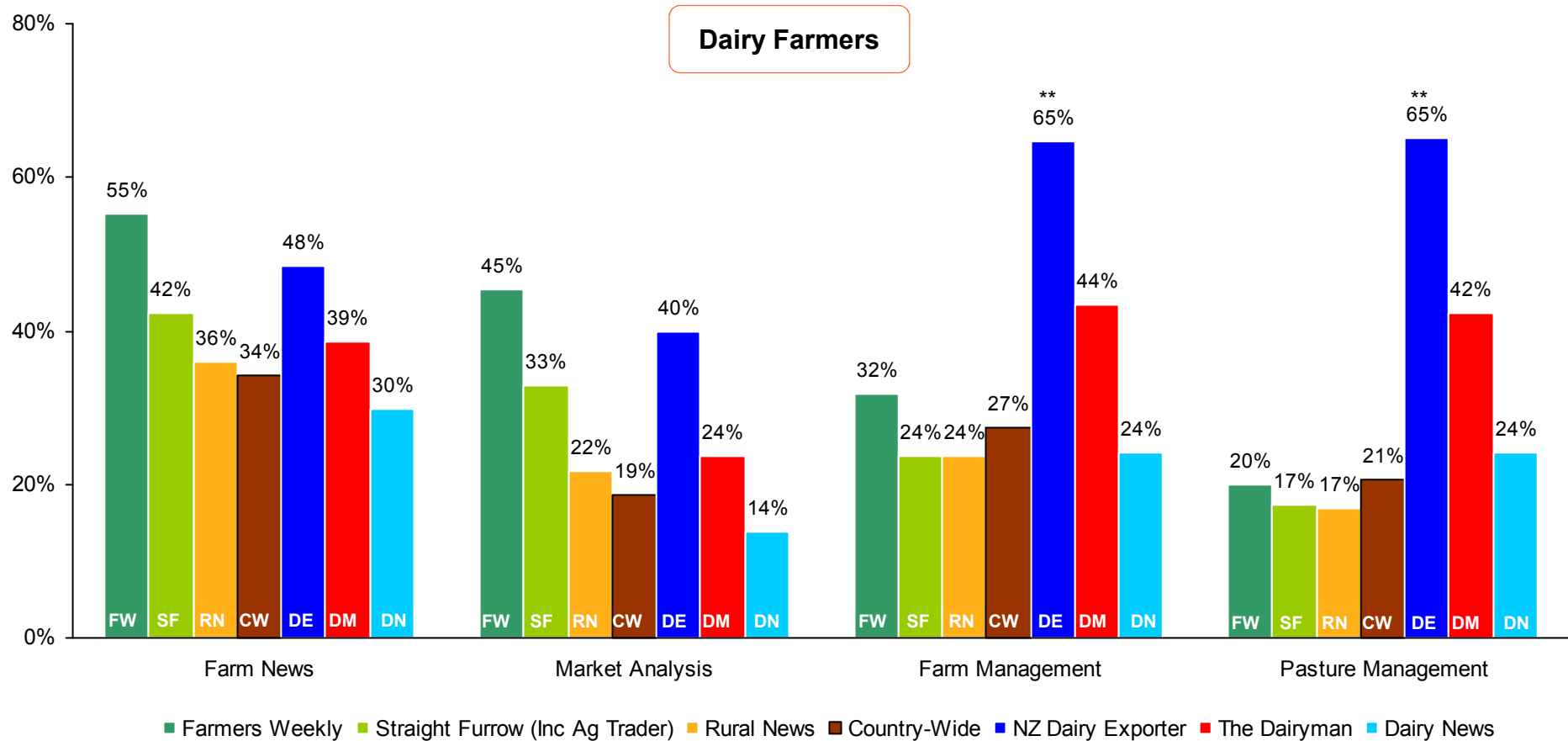


Dairy Farmers - Summary

- Dairy Farmers
 - *NZ Dairy Exporter* leads for recognition of quality articles about:
 - Farm management
 - Pasture management
 - Research & development, and
 - For having articles that inspire
- *NZ Dairy Exporter* is the most highly rated dairy publication amongst dairy farmers for providing knowledge that helps them with the operation of their farms
- Although the 'Worth Reading' score for *NZ Dairy Exporter* (7.0) is higher than for *Farmers Weekly* (6.7), and *The Dairyman* (6.6), the results are within the confidence limits for the study and therefore are not conclusive
- More dairy farmers spend more than 30 minutes reading *NZ Dairy Exporter* relative to other publications included in the survey, with the exception of *Farmers Weekly*
- The proportion of dairy farmers that read more than 60% of a publication is higher for *NZ Dairy Exporter*, than for *Straight Furrow*, *Country-Wide* and *Young Country*, but similar for other dairy publications; *The Dairyman* and *Dairy News*. A similar proportion of dairy farmers read more than 60% of *NZ Dairy Exporter* as do *Farmers Weekly* and *Rural News*

NZ Dairy Exporter is strongly associated with articles about farm management and for pasture management⁽³⁾

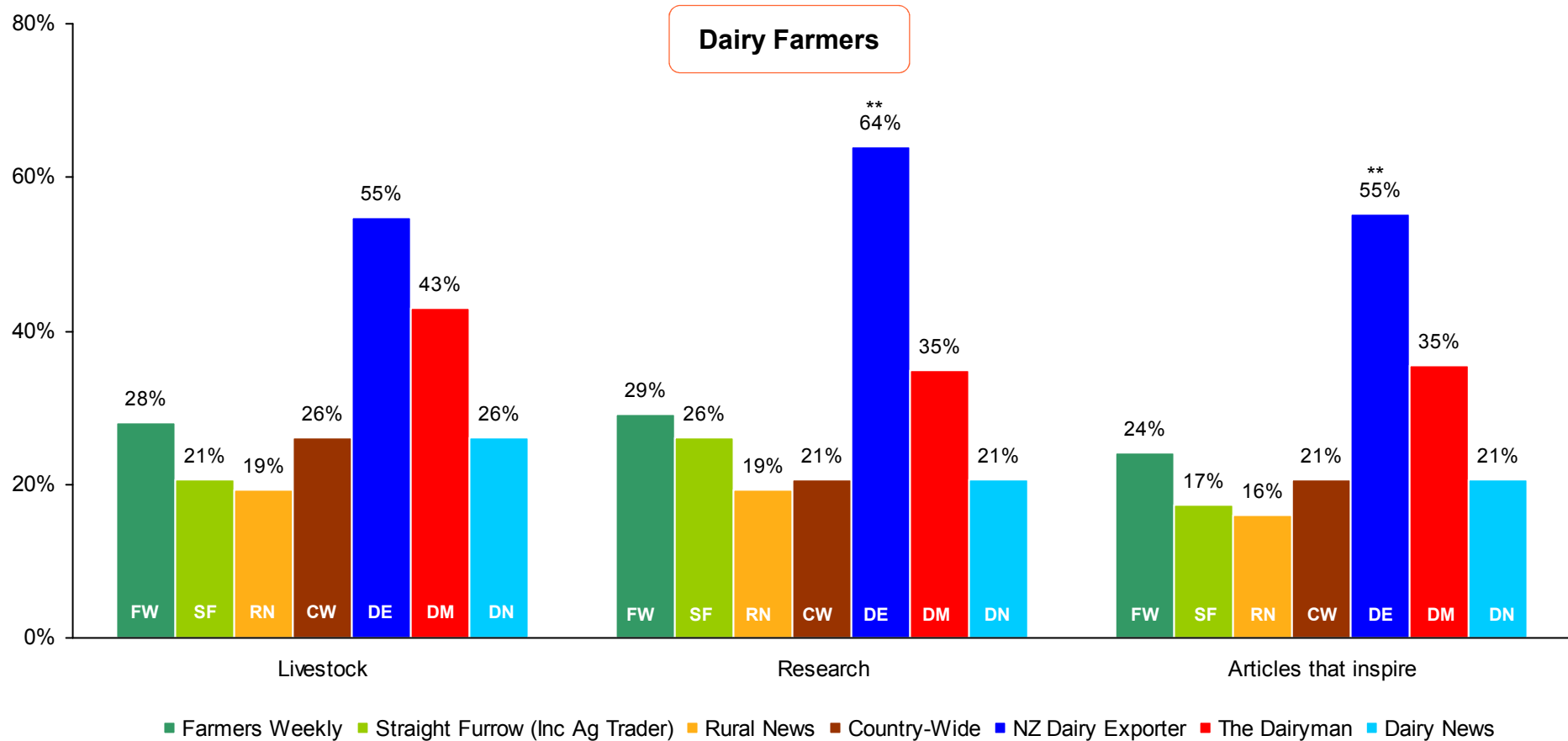
Article Type and Publication Association – Dairy Farmers Only⁽¹⁾⁽²⁾



Notes: 1. Base: Dairy Farmers, n = 161; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Dairy farmers also strongly associate *NZ Dairy Exporter* with articles about research & development and articles that inspire⁽³⁾

Article Type and Publication Association – Dairy Farmers Only ⁽¹⁾ ⁽²⁾



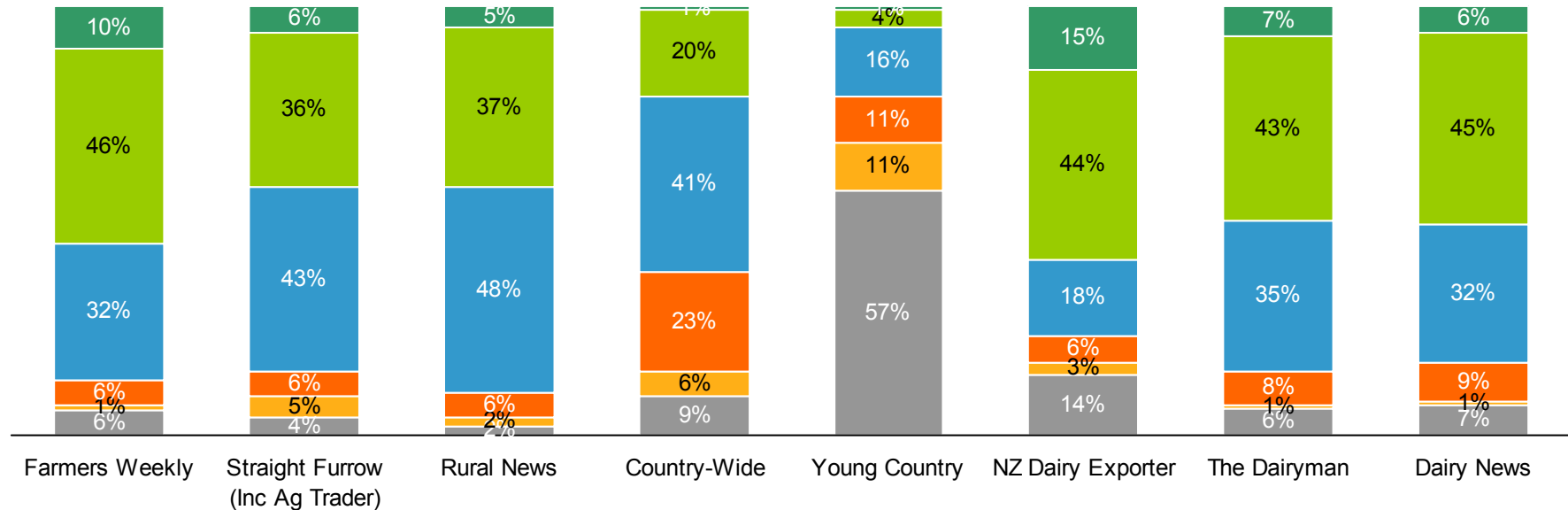
Notes: 1. Base: Dairy Farmers, n = 161; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

NZ Dairy Exporter is highly regarded amongst dairy farmers as a publication that provides knowledge that helps with farming activities⁽³⁾

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

Dairy Farmers

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



Mean score 6.7 6.0 6.2 5.2 4.2 6.9 6.4 6.4

Significantly higher than Straight Furrow, Rural News, Country-Wide & Young Country

Significantly lower than all other publications except Young Country

Significantly lower than all other publications

Significantly higher than all others except Farmers Weekly



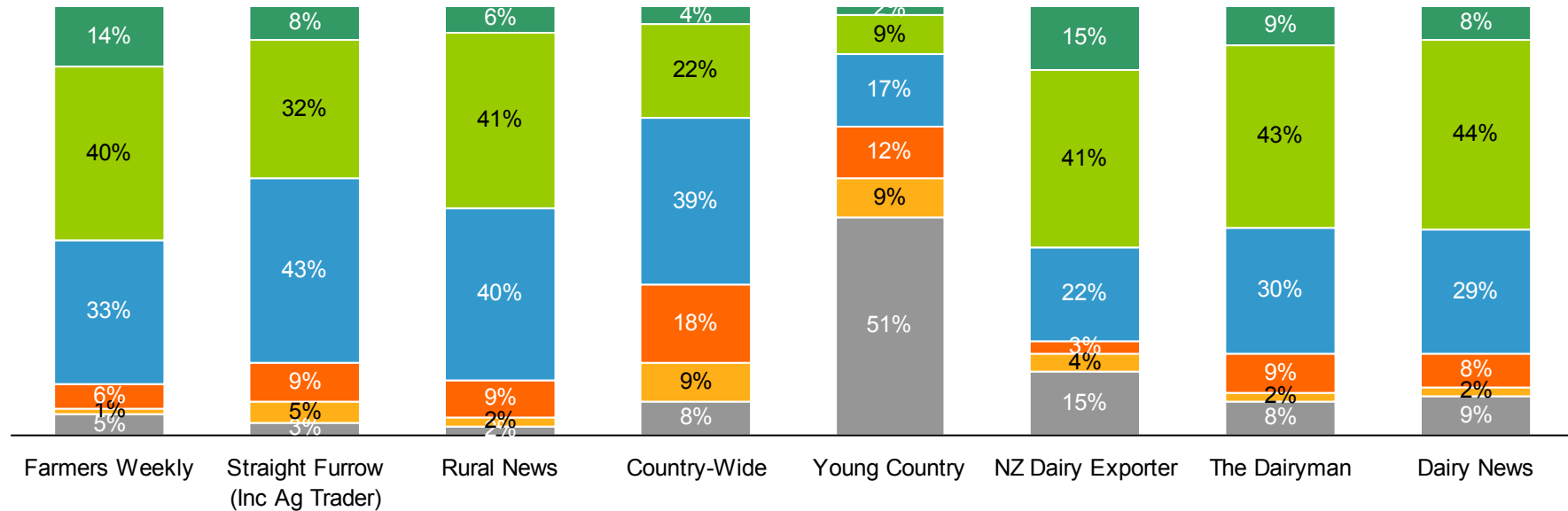
Notes: 1. Base: Dairy farmers, n = 171
 2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

Dairy farmers regard *NZ Dairy Exporter*, *The Dairyman* and *Farmers Weekly* as publications that are most worth reading⁽³⁾

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

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

Dairy Farmers



Mean score 6.7 6.1 6.3 5.3 4.7 7.0 6.6 6.5

Significantly higher than Straight Furrow, Rural News, Country-Wide & Young Country

Significantly lower than all other publications

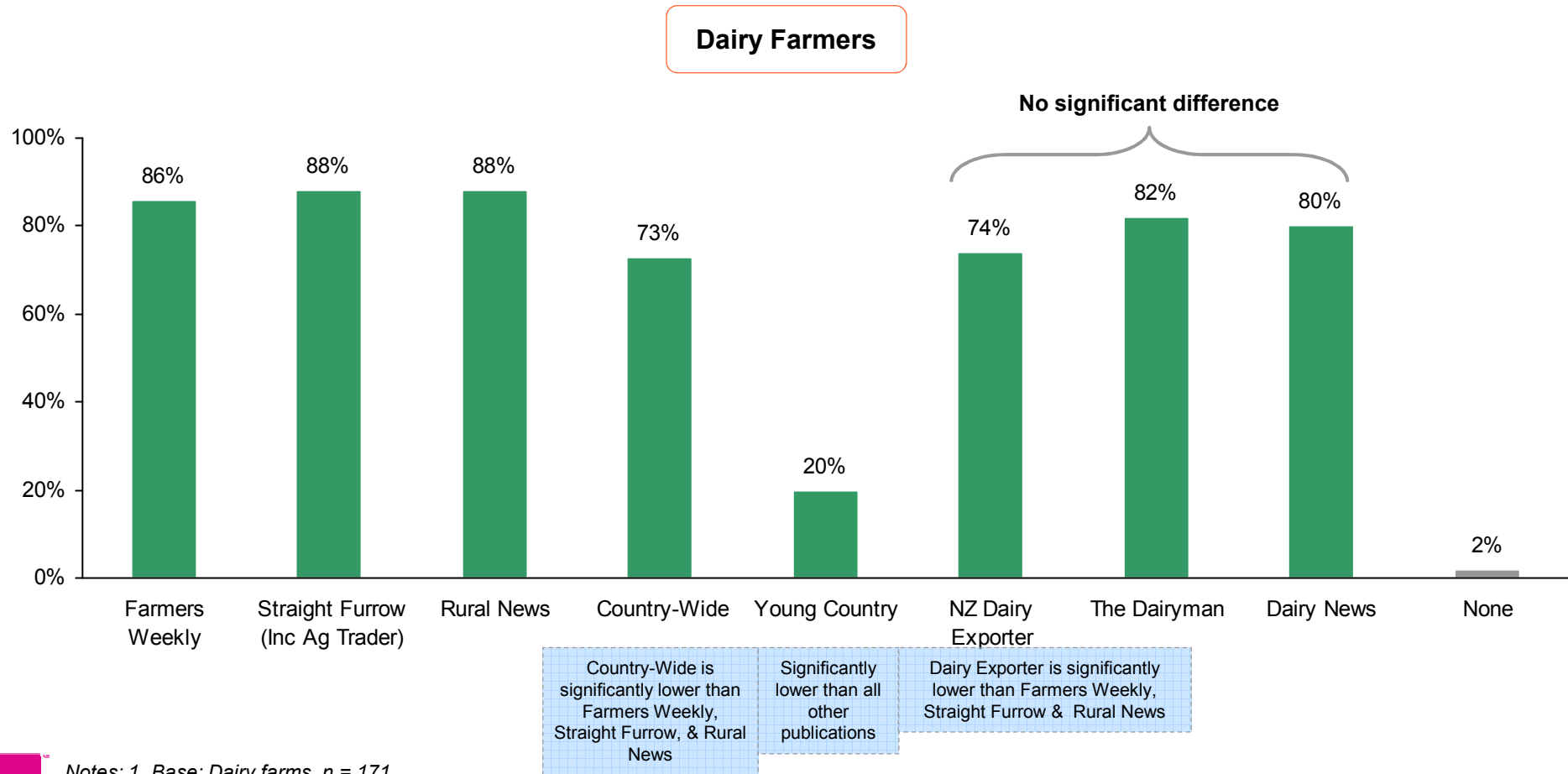
Significantly higher than all other publications except Farmers Weekly & The Dairyman



Notes: 1. Base: Dairy Farms, n = 171
 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 dairy farmers, there is not a significant difference in the proportion that at least open and look through each publication delivered, with the exceptions of *Young Country*, *Country-Wide* and *NZ Dairy Exporter*. Only 2% of dairy farmers do not open any of the rural publications⁽³⁾

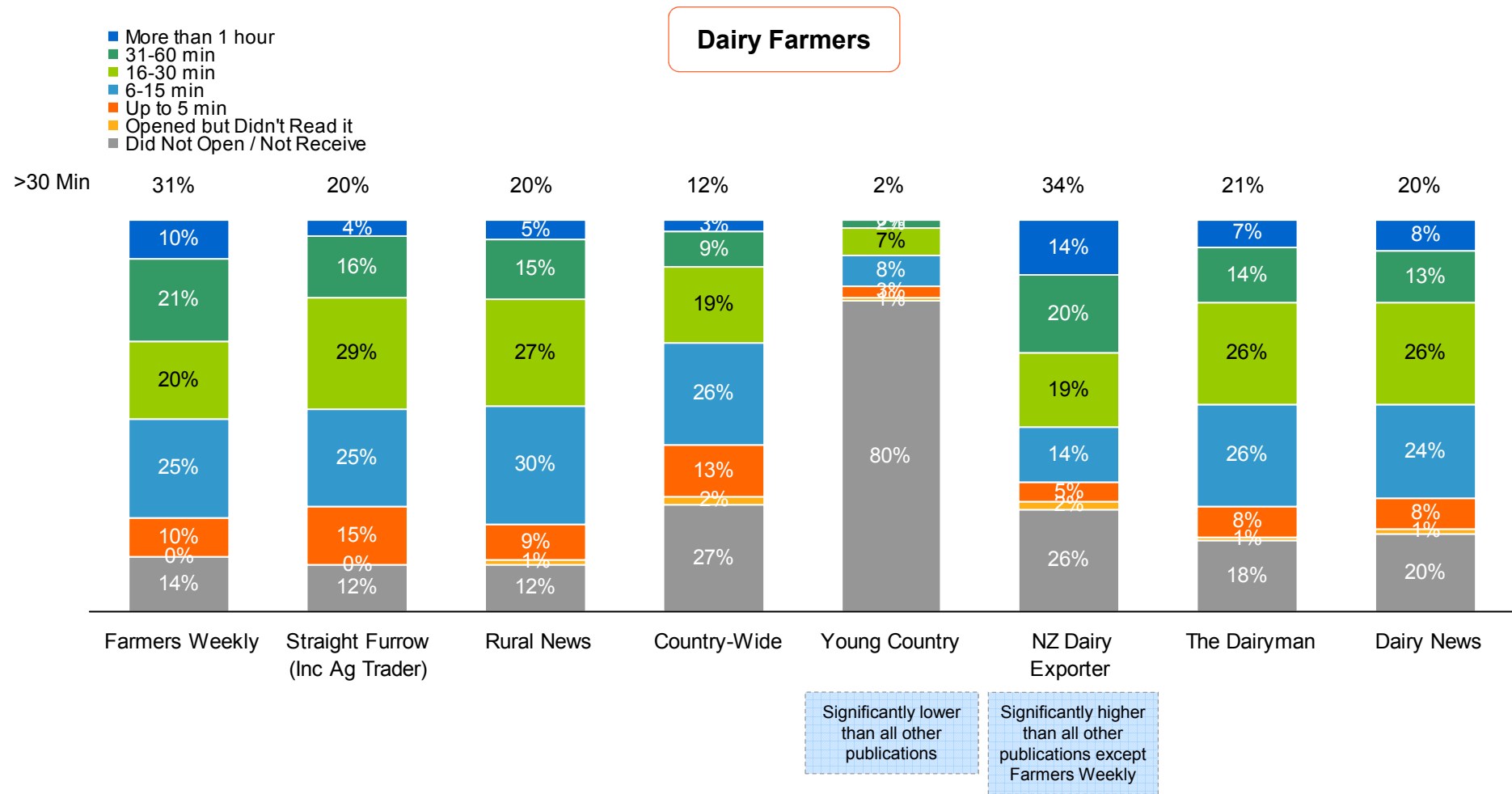
Publications at Least Opened in Last Month – Dairy Farmers Only⁽¹⁾⁽²⁾



Notes: 1. Base: Dairy farms, n = 171
 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

More dairy farmers spend more than 30 minutes reading *NZ Dairy Exporter* than any of the other publications, with the exception of *Farmers Weekly*⁽³⁾

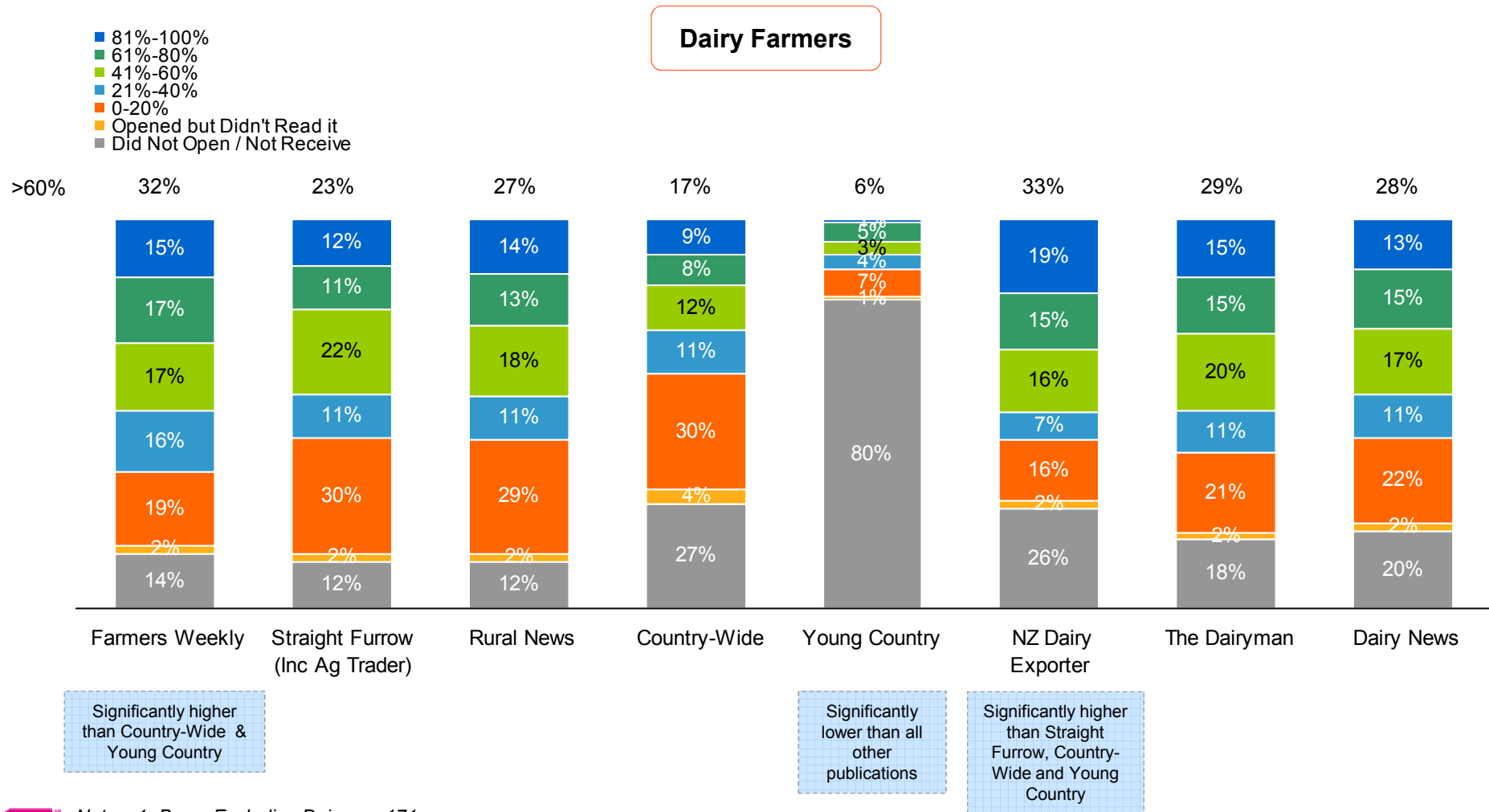
Time Spent Reading – Dairy Farmers Only⁽¹⁾⁽²⁾



Notes: 1. Base: Dairy n = 171
 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 >60% of the dairy publications is similar. More farmers read >60% of *NZ Dairy Exporter* than do *Straight Furrow*, *Country-Wide* and *Young Country*

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



Notes: 1. Base: Excluding Dairy n = 171
 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

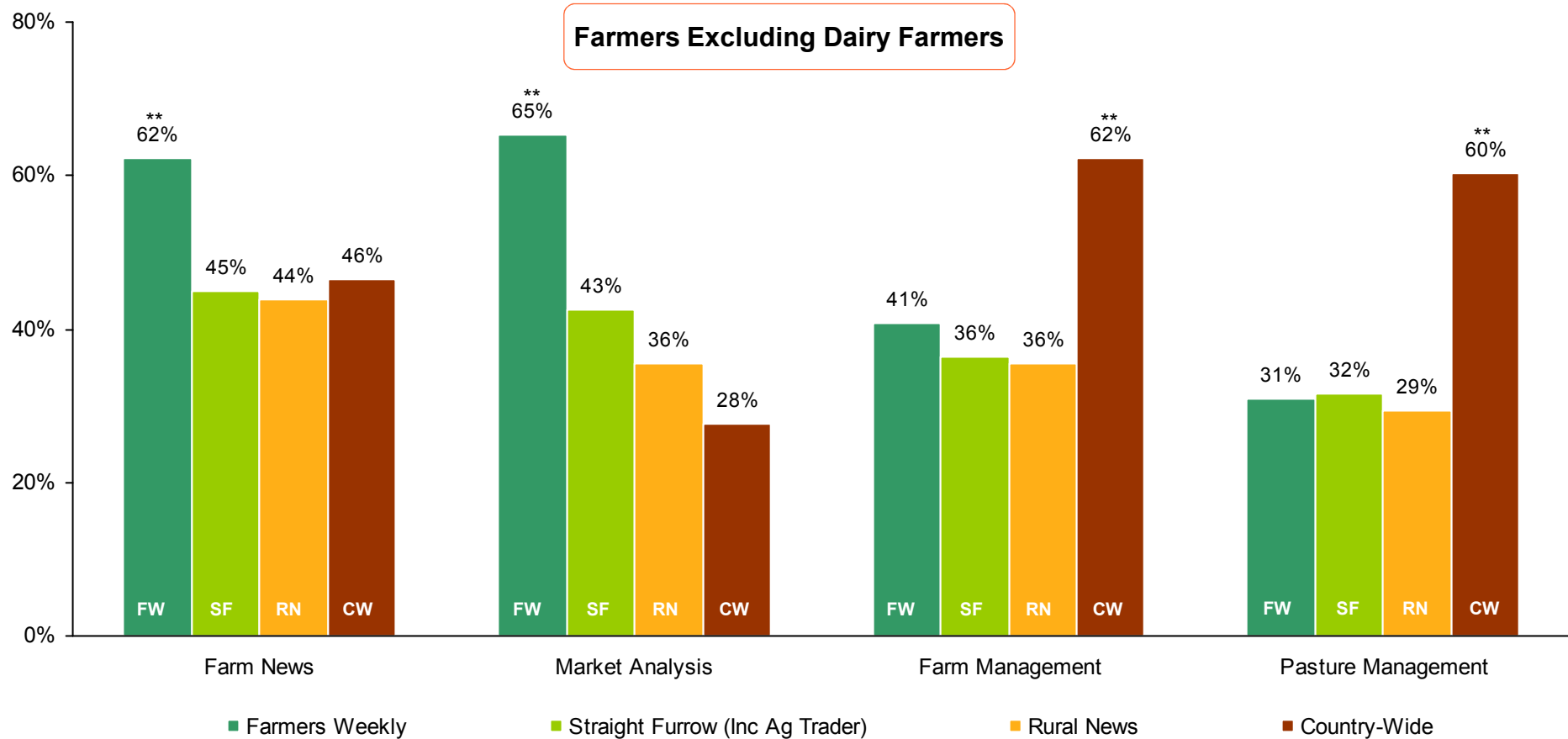


Excluding dairy farmers - Summary

- Farmers excluding dairy
 - *Country-Wide* leads for recognition of quality articles about:
 - Farm management,
 - Pasture management
 - Livestock, and for
 - Articles that inspire
 - *NZ Farmers Weekly* is the publication that is the most strongly associated with quality articles about:
 - Farm news, and
 - Market analysis
 - *Farmers Weekly* and *Country-Wide* are rated higher than other publications surveyed in terms of providing knowledge that assists with managing their farm and for being a publication worth reading
 - A higher proportion of farmers, excluding dairy, spend more than 30 minutes reading *Country-Wide* and *Farmers Weekly* than *Rural News* or *Young Country*
 - More farmers read >60% of *Farmers Weekly* relative to other publications

Excluding dairy farmers, *NZ Farmers Weekly* is the most recognised publication for farm news and market analysis. *Country-Wide* is the most recognised publication for quality farm management articles and pasture management⁽³⁾

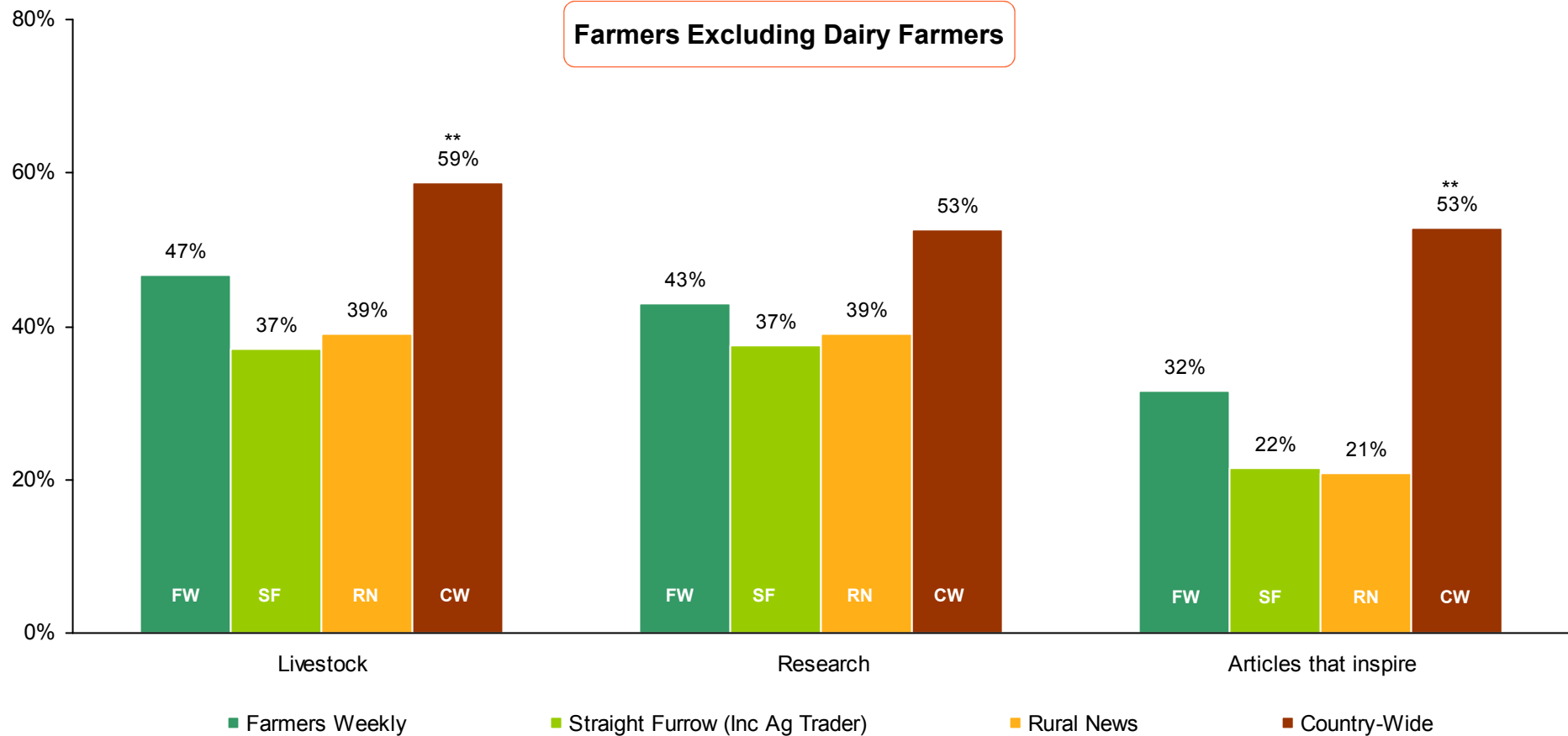
Article Type and Publication Association – Excluding Dairy Farmers⁽¹⁾⁽²⁾



Notes: 1. Base: Farms excluding Dairy Farms, 289; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Country-Wide also holds the lead position as being most recognised for articles about livestock and articles that inspire⁽³⁾

Article Type and Publication Association – Excluding Dairy Farmers⁽¹⁾⁽²⁾



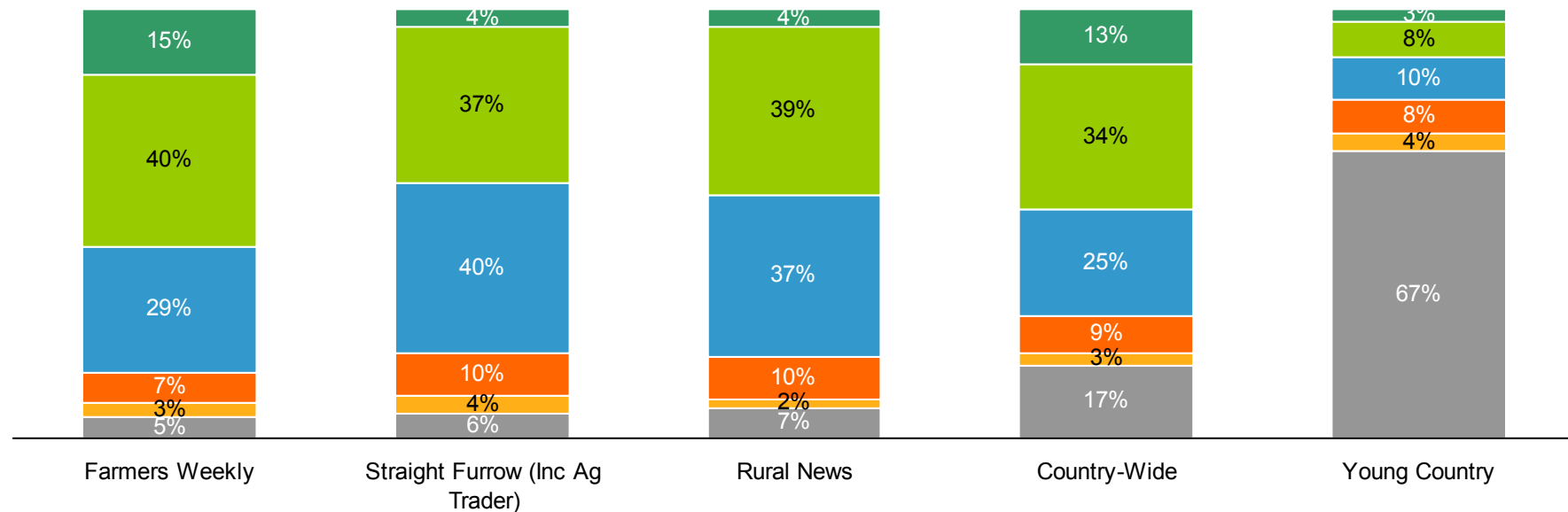
Notes: 1. Base: Farms excluding Dairy Farms, 289; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Excluding dairy farmers, *Country-Wide and Farmers Weekly* are rated more highly than *Straight Furrow, Rural News and Young Country* for providing knowledge that helps with farming activities⁽³⁾

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

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

Excluding Dairy Farmers



Mean score

6.7

6.1

6.2

6.5

5.2

Significantly higher than all other publications

Significantly higher than all other publications except Farmers Weekly

Significantly lower than all other publications



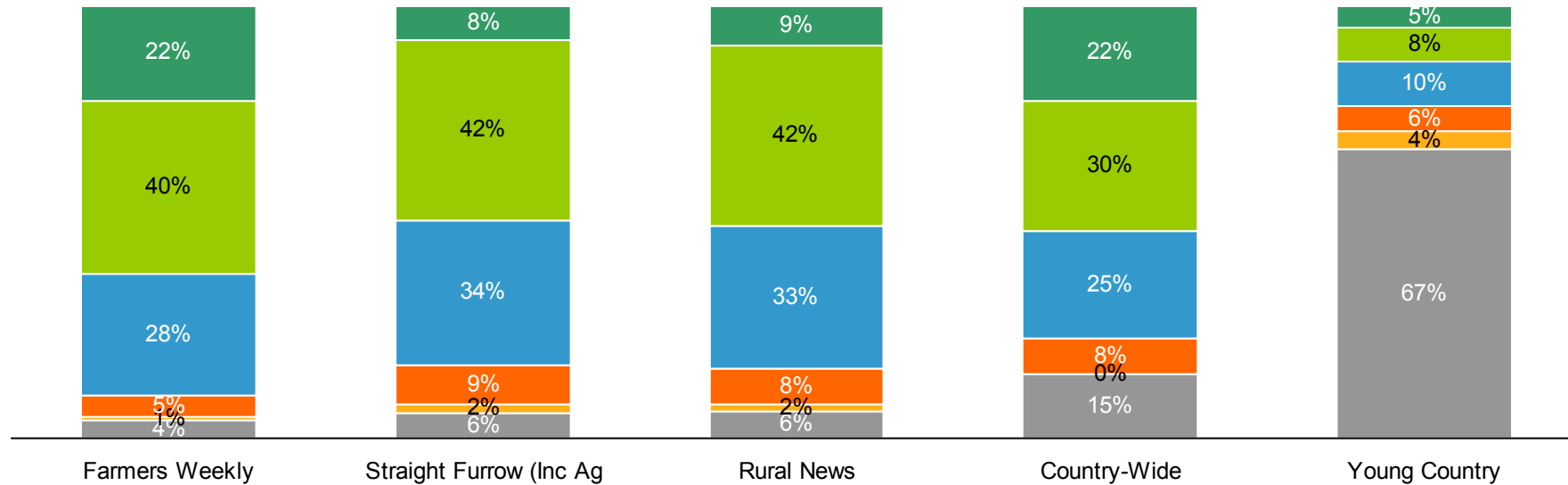
- Notes: 1. Base: Farms excluding Dairy Farms, n = 279
 2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

Of all farmers excluding dairy, *Country-Wide* and *Farmers Weekly* have a similar evaluation and both are rated as more worthwhile reading than *Straight Furrow*, *Rural News* or *Young Country*⁽³⁾

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

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

Excluding Dairy Farmers



Publication	Mean score
Farmers Weekly	7.1
Straight Furrow (Inc Ag Trader)	6.5
Rural News	6.5
Country-Wide	7.0
Young Country	5.7

Significantly higher than all other publications, except Country-Wide

Significantly higher than all other publications except Farmers Weekly

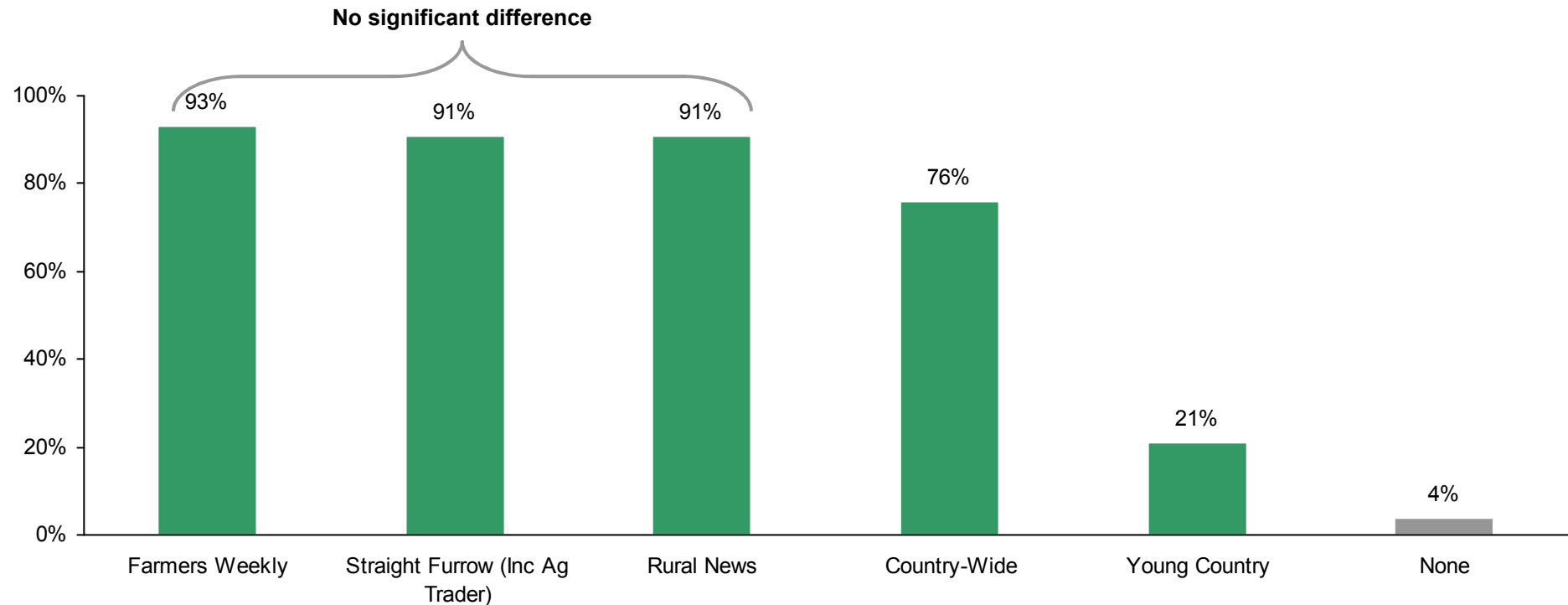


Notes: 1. Base: Farms excluding Dairy Farms, n = 279
 2. In terms of being worthwhile reading, how worthwhile is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

Excluding dairy farmers, there is not a significant difference in the proportion that at least open each publication delivered, excluding *Country-Wide* and *Young Country*. Only 4% do not open any of the rural publications⁽³⁾

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

Excluding Dairy Farmers



Notes: 1. Base: Dairy farms, n = 279

2. In the last month, what of the following publications have you at least opened and 'flicked' through?

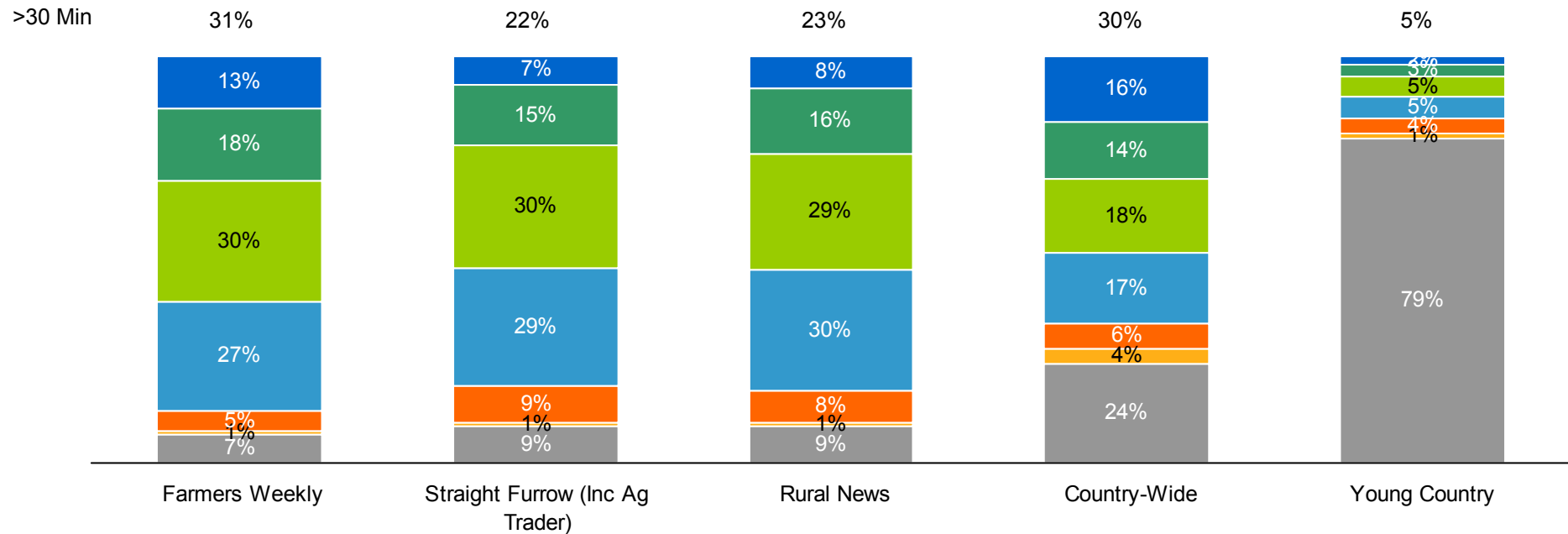
3. Significance test based on 95% CI

Of all farmers excluding dairy, a higher proportion spend more than 30 minutes reading *Farmers Weekly and Country-Wide* than *Straight Furrow, Rural News, or Young Country*⁽³⁾

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

Excluding Dairy Farmers

- More than 1 hour
- 31-60 min
- 16-30 min
- 6-15 min
- Up to 5 min
- Opened but Didn't Read it
- Did Not Open / Not Receive



Significantly higher than Straight Furrow, Rural News & Young Country

Significantly higher than Straight Furrow, Rural News & Young Country

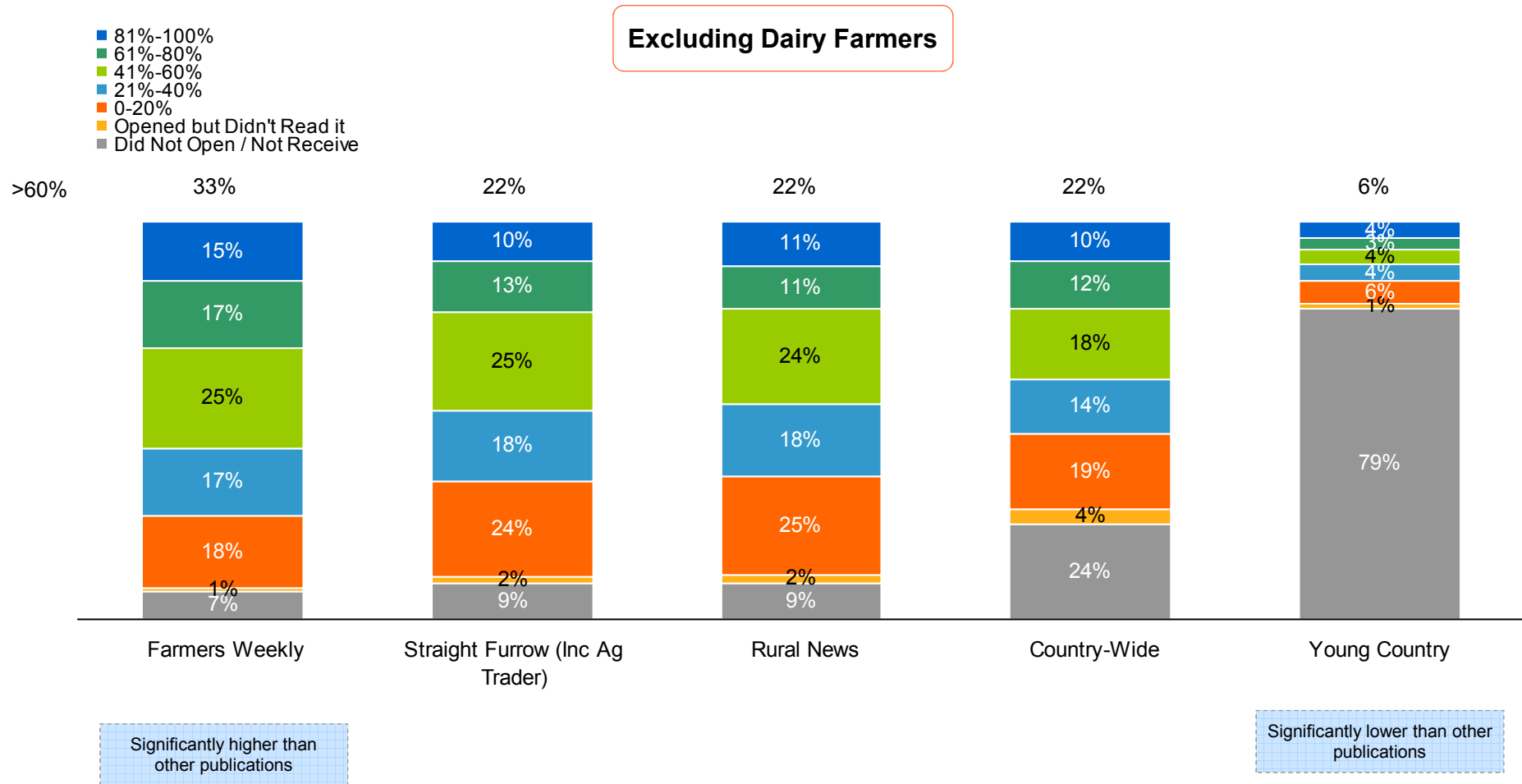
Significantly lower than other publications



Notes: 1. Base: Excluding Dairy n = 279
 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, more read > 60% of *Farmers Weekly* than other publications⁽³⁾. *Young Country* has the lowest readership with 79% not receiving or not opening

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



Notes: 1. Base: Excluding Dairy n = 279
 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



Explanation on Techniques Applied

- A variance analysis looks at profiles across brands and determines what attributes are peaking on that brand, so regardless of the number of people who have chosen a brand, attributes can still be identified as high on that brand
- A variance analysis can be used to produce performance scores for a number of brands on a number of attributes. If a difference score of -5% is yielded, it means that brand was associated with that attribute 5% less than expected. If a difference score is +5% it means the brand was associated with that attribute 5% more than expected. This means that difference scores are a measure of how a brand is 'performing' on that attribute
- Jaccard analysis was used to categorise responses to the question 'How worth reading is [publication]' using a 1-10 scale with those scoring 7-10 being categorised as worth reading and those scoring 1-6 as not worth reading. The binary relationship between 'Worth reading' and attributes that farmers associated with each publication was calculated for each respondent and the result averaged for each attribute. The ranked order of the average attribute scores indicates the importance that farmers place on each attribute when determining whether or not a publication is worth reading

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 4th July and 13th July 2011 as part of a quarterly omnibus survey of agri-businesses in New Zealand. The omnibus survey interviewed 450 farmers. A number of slides have been included from a prior survey conducted in 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)