



TNS Independent Rural Readership Survey

12 January 2011

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Readership Dashboard; Key results at a glance

Key Point Review

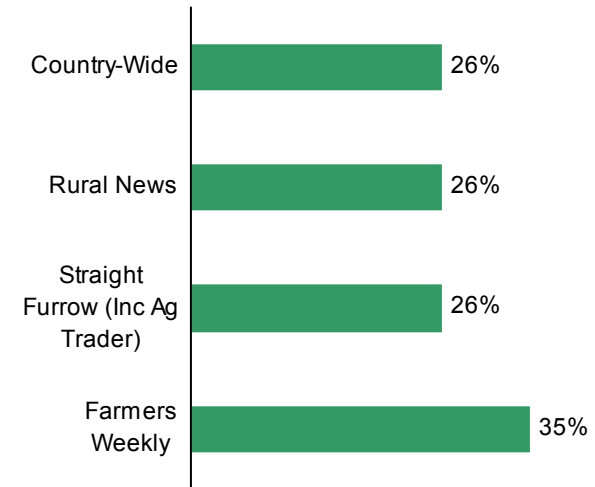
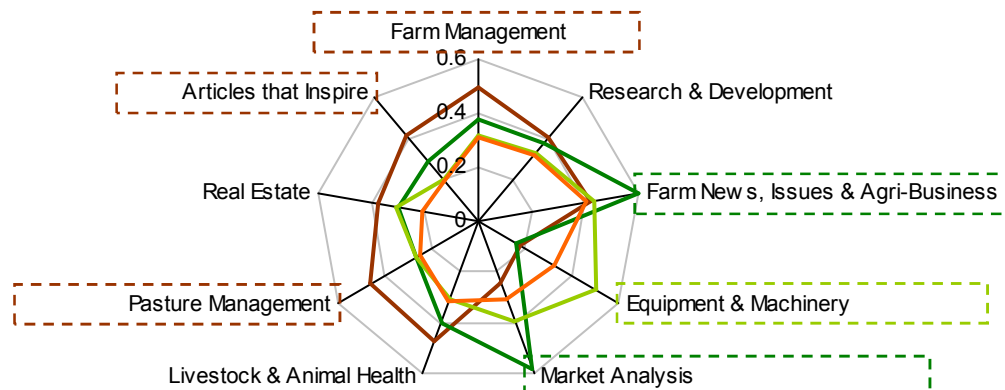
Topics of importance – all farmers:

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 most frequently associated with farm machinery.

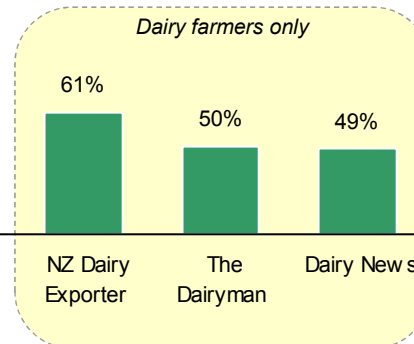
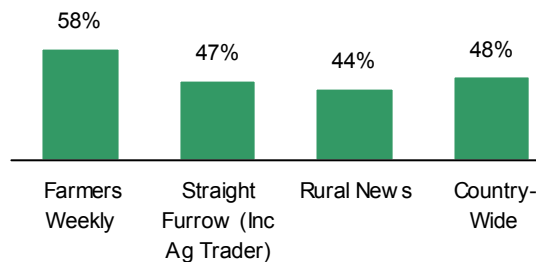
Readership – all farmers:

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

Country-Wide Farmers Weekly Straight Furrow (Inc Ag Trader) Rural News



Notes: 1. Base: All farms, n = 450;
 2. Base: Dairy, n = 166;
 3. Base: Excluding Dairy n = 284



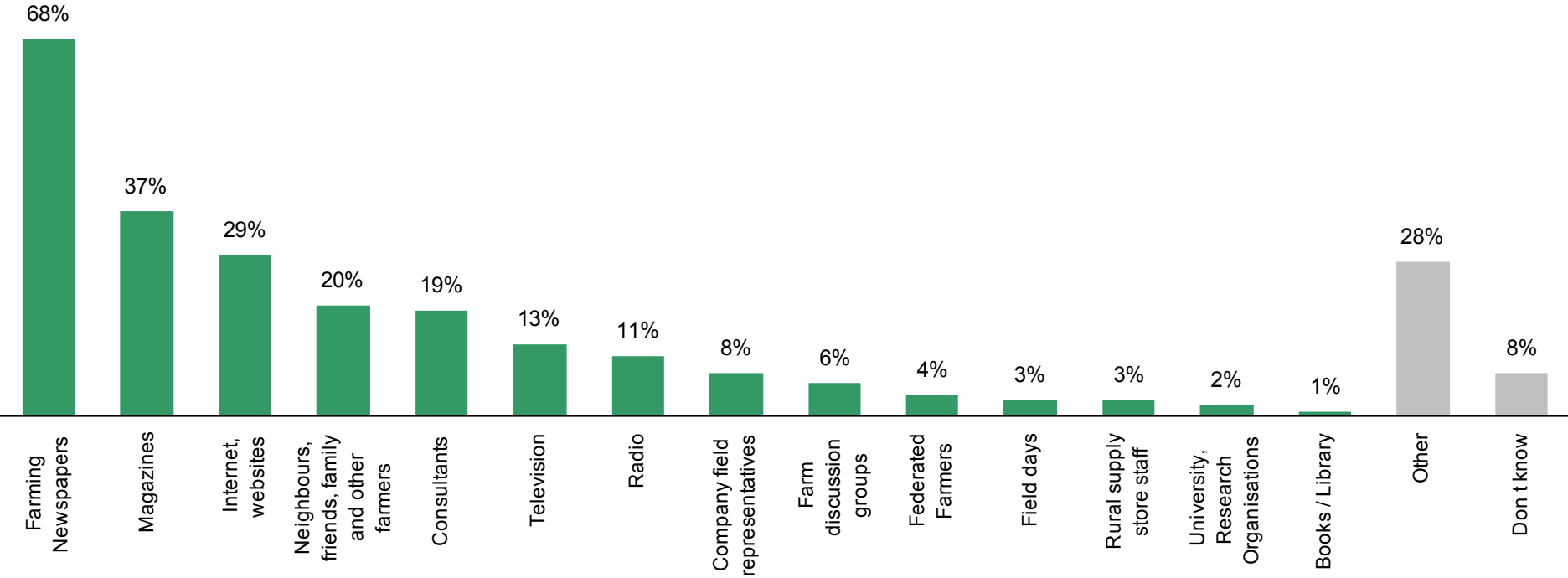
Worth reading – all farmers:

58% of all farmers rate *NZ Farmers Weekly* a 7 or more out of 10 as being worthwhile reading. 61% of dairy farmers rate *NZ Dairy Exporter* a 7 or more as being worthwhile reading.



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%



Jaccard analysis was applied to establish a ranked order of importance for the various attributes relating to rural publications. Specifically, we measured the binary brand by attribute association to establish which attributes are most important to farmers

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

The analysis categorised 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



Note: (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	

The analysis categorised 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



Note: (1) Base: All Farms, n = 450 – September 2010

All Farmers



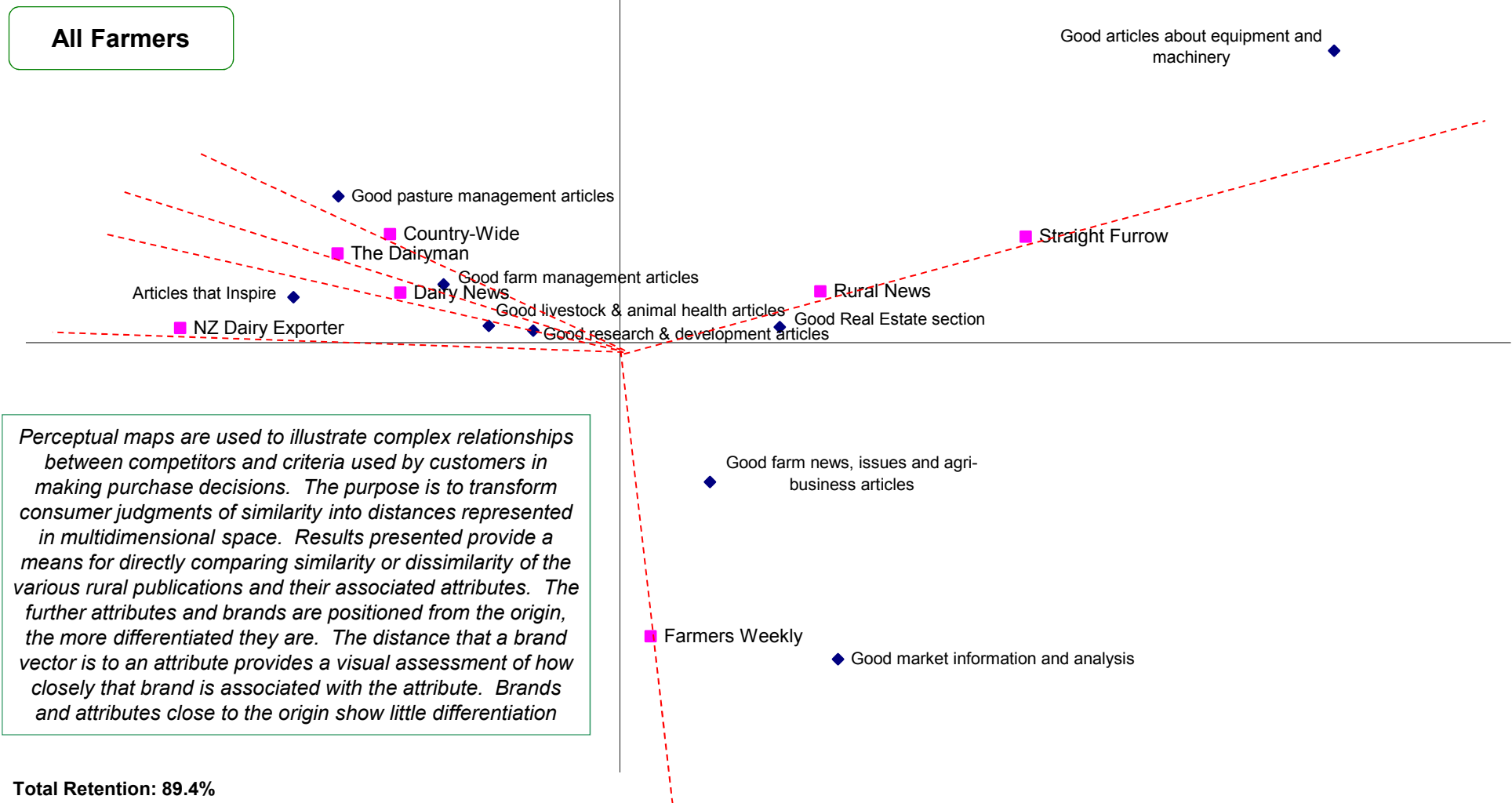
All Farmers - Summary

■ 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* and *Straight Furrow* in terms of providing knowledge
- Excluding dairy publications,
 - *Farmers Weekly* is also 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* and *Country-Wide* than they do *Rural News* or *Straight Furrow*
- Only about 3% of farmers do not open any of the rural publications that they receive

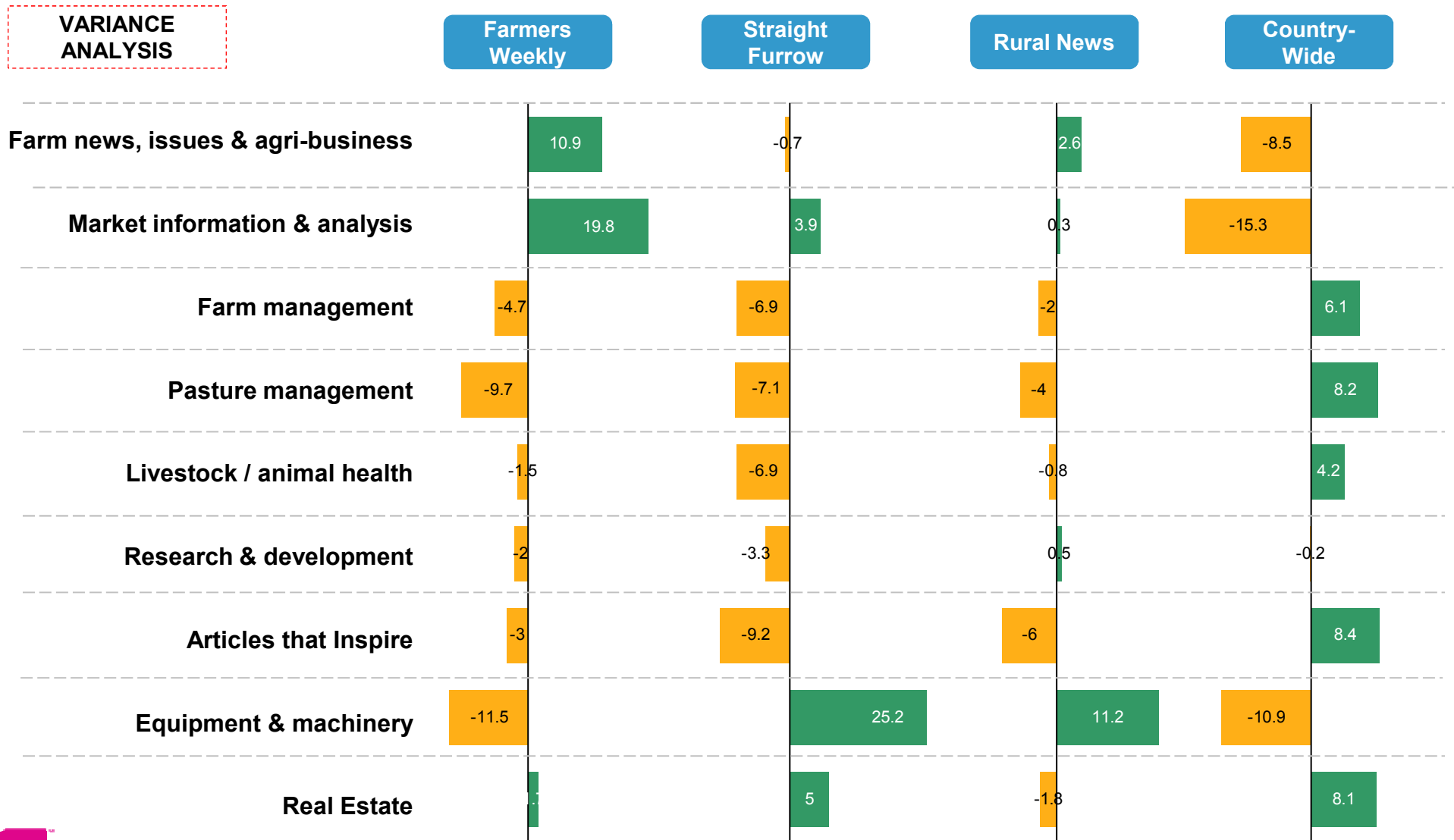
The three dairy publications and *Country-Wide* are positioned on similar attributes. *Rural News* and *Straight Furrow* are seen as similar. *NZ Farmers Weekly* occupies a unique space being strongly position on farm news and market analysis

Perceptual Map (All Farmers)⁽¹⁾



Note: (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



Note: 1. Base: n = 450 All farms; September 2010

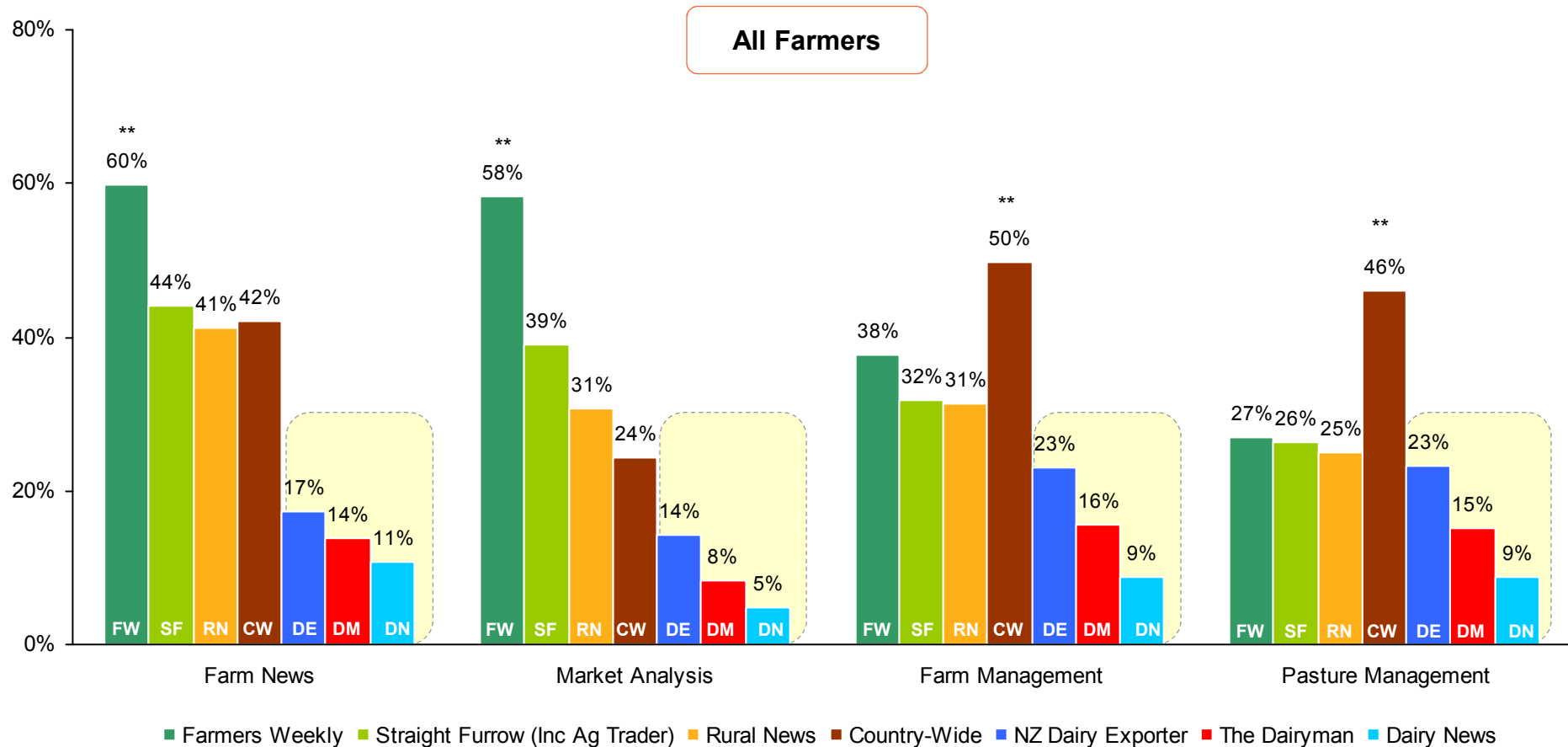
NZ Dairy Exporter is the only dairy publication with a reasonably differentiated profile



Note: 1. Base: n = 450 All farms; 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⁾



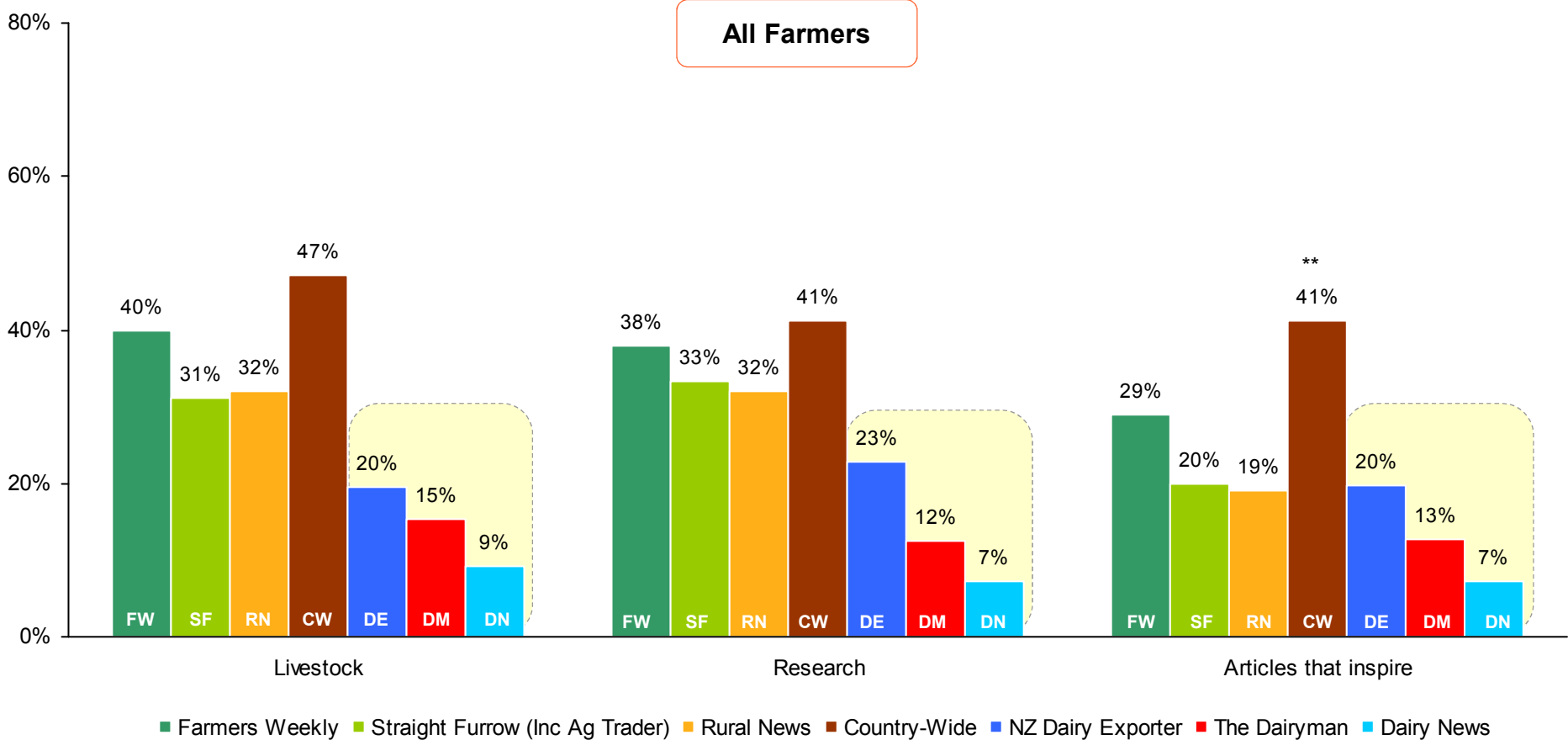
Notes: 1. Base: All farms, n = 450; Dairy n = 161; September 2010
 2. QCW1 What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Asked of Dairy Farmers only⁽¹⁾



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

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



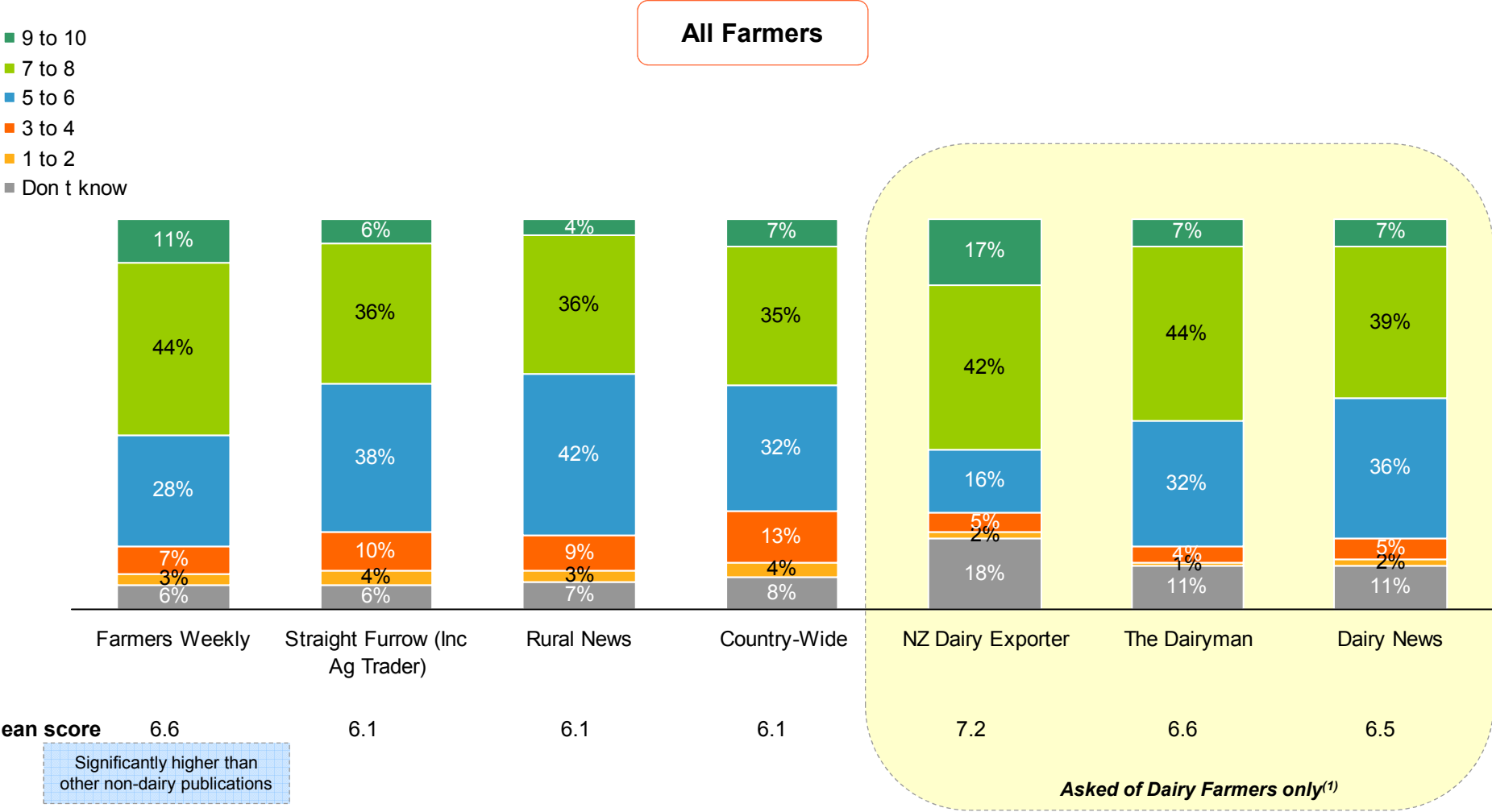
Notes: 1. Base: All farms, n = 450; September 2010
 2. QCW1 What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

Asked of Dairy Farmers only⁽²⁾



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⁾



Significantly higher than other non-dairy publications



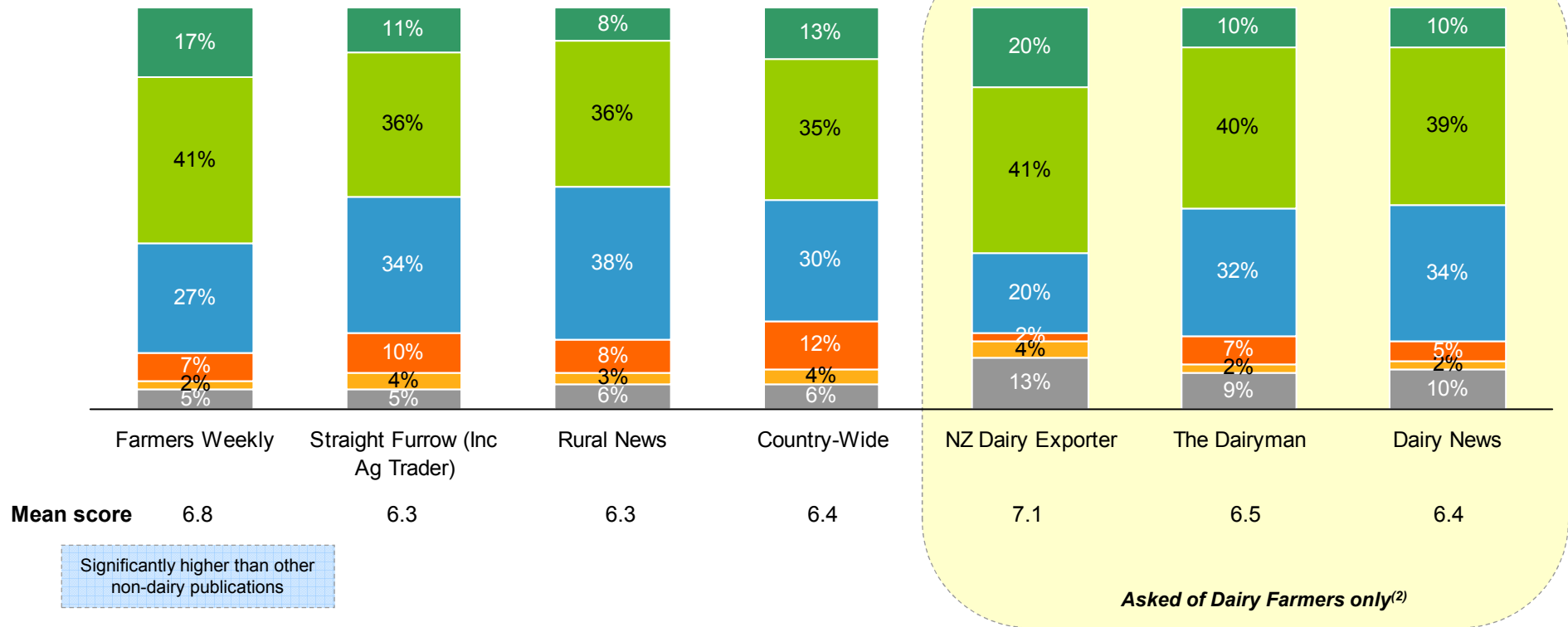
Notes: 1. Base: All farms, n = 450; Dairy Farms, n= 166
 2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)
 3. **Significance tests calculated on mean scores using a 95% CI

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⁾

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

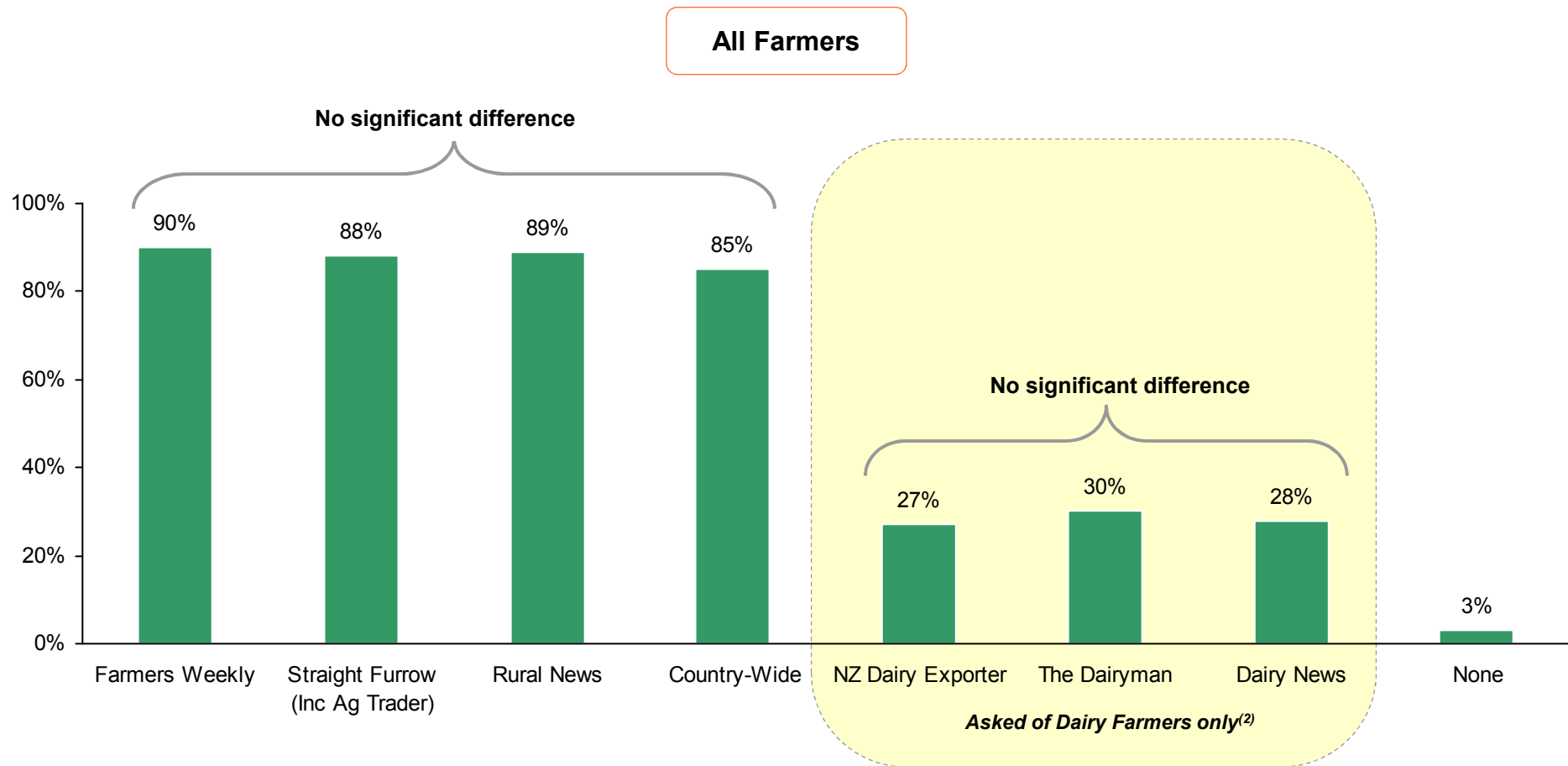
All Farmers



Notes: 1. Base: All farms, n = 450; Dairy n= 166
 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, there is not a significant difference in the proportion that at least open and look through each publication delivered. Only 3% of farmers do not open any of the rural publications⁽³⁾

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



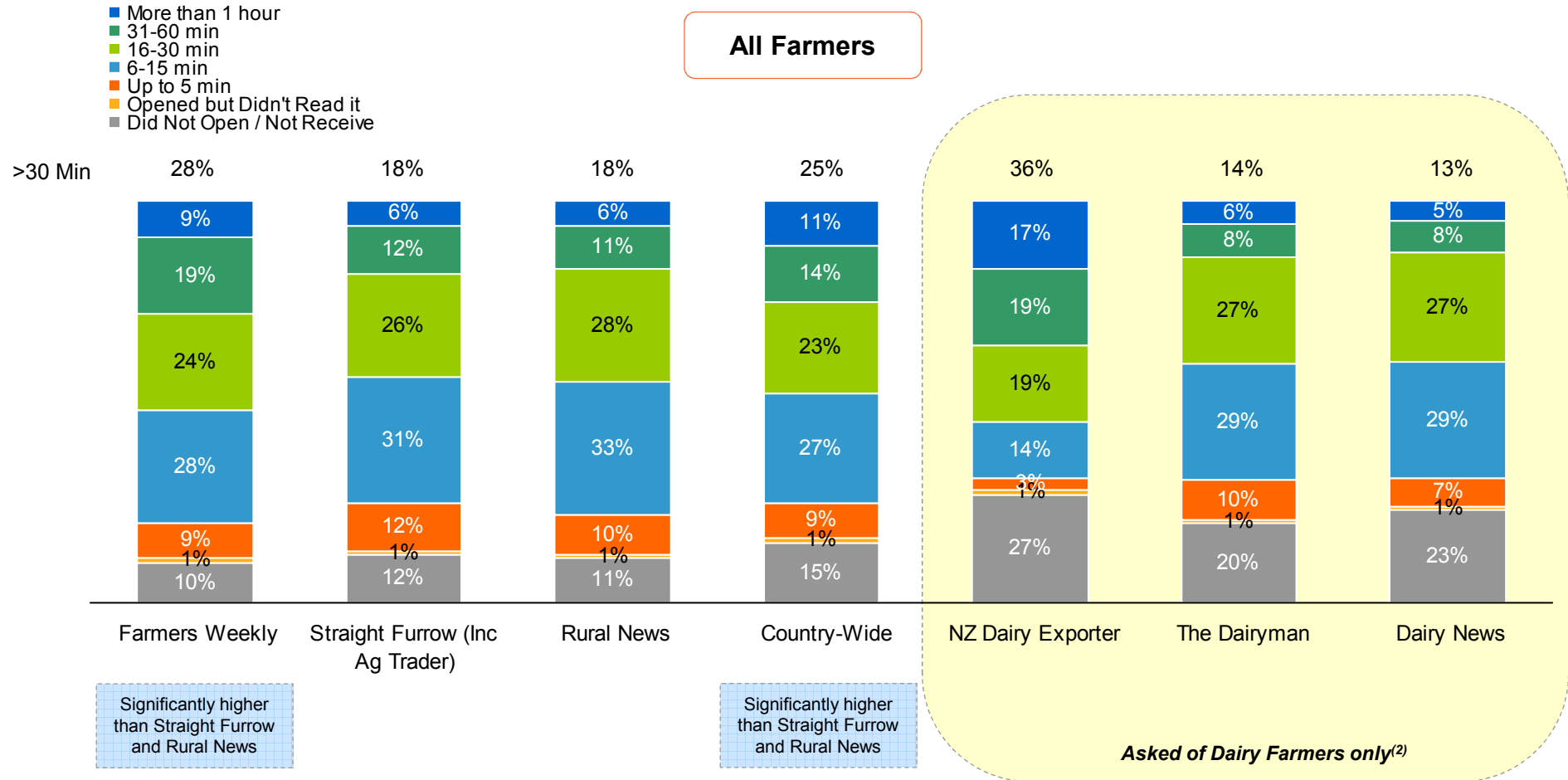
Notes: 1. Base: All Farmers, n = 450; Dairy n = 166

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 *Country-Wide* and *Farmers Weekly* than they do *Rural News* or *Straight Furrow*⁽³⁾

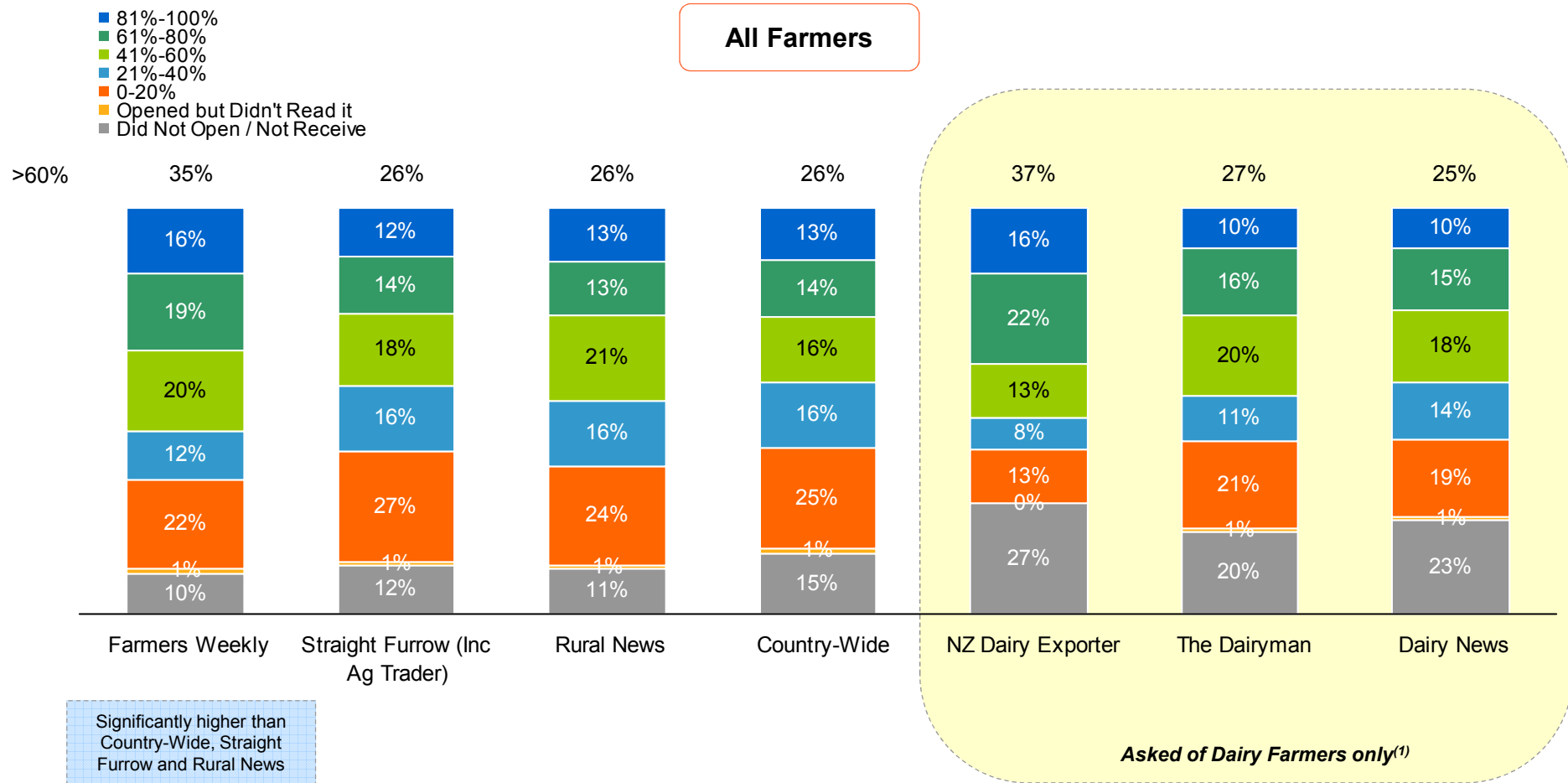
Time Spent Reading – All Farmers⁽¹⁾⁽²⁾



Notes: 1. Base: All farms, n = 450; Dairy n= 166
 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* and *Country-Wide*⁽³⁾

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



Notes: 1. Base: All farms, n = 450; Dairy n= 166
 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

Dairy Farmers

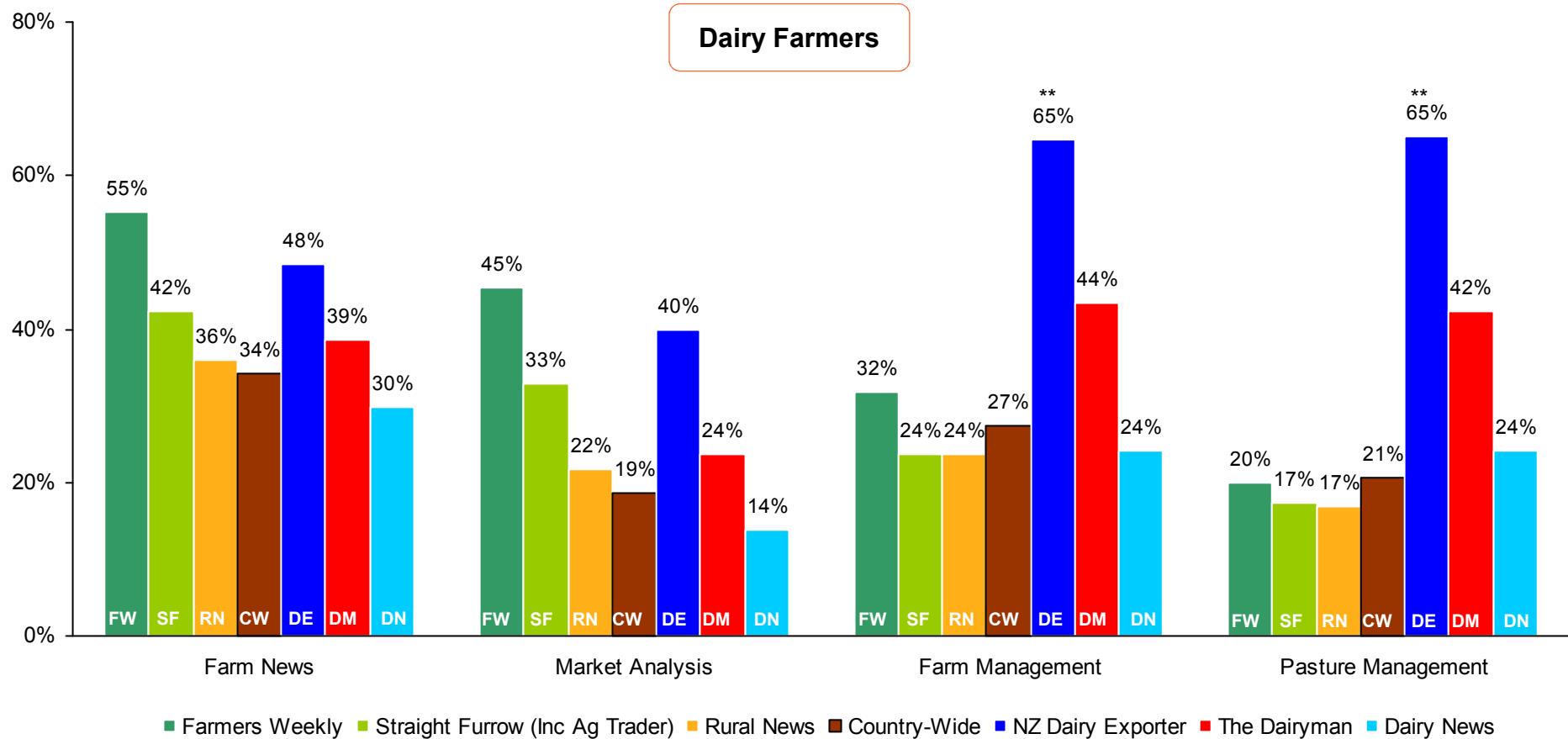


Dairy Farmers - Summary

- 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 publication amongst dairy farmers for providing knowledge that helps them with the operation of their farms
 - *NZ Dairy Exporter* is also the most highly rated publication of those included in the survey for being worth reading
 - More dairy farmers spend more than 30 minutes reading *NZ Dairy Exporter* than do other publications included in the survey
 - The proportion of dairy farmers that read more than 60% of a publication is similar for *NZ Dairy Exporter*, *Farmers Weekly*, and *The Dairyman*

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⁾

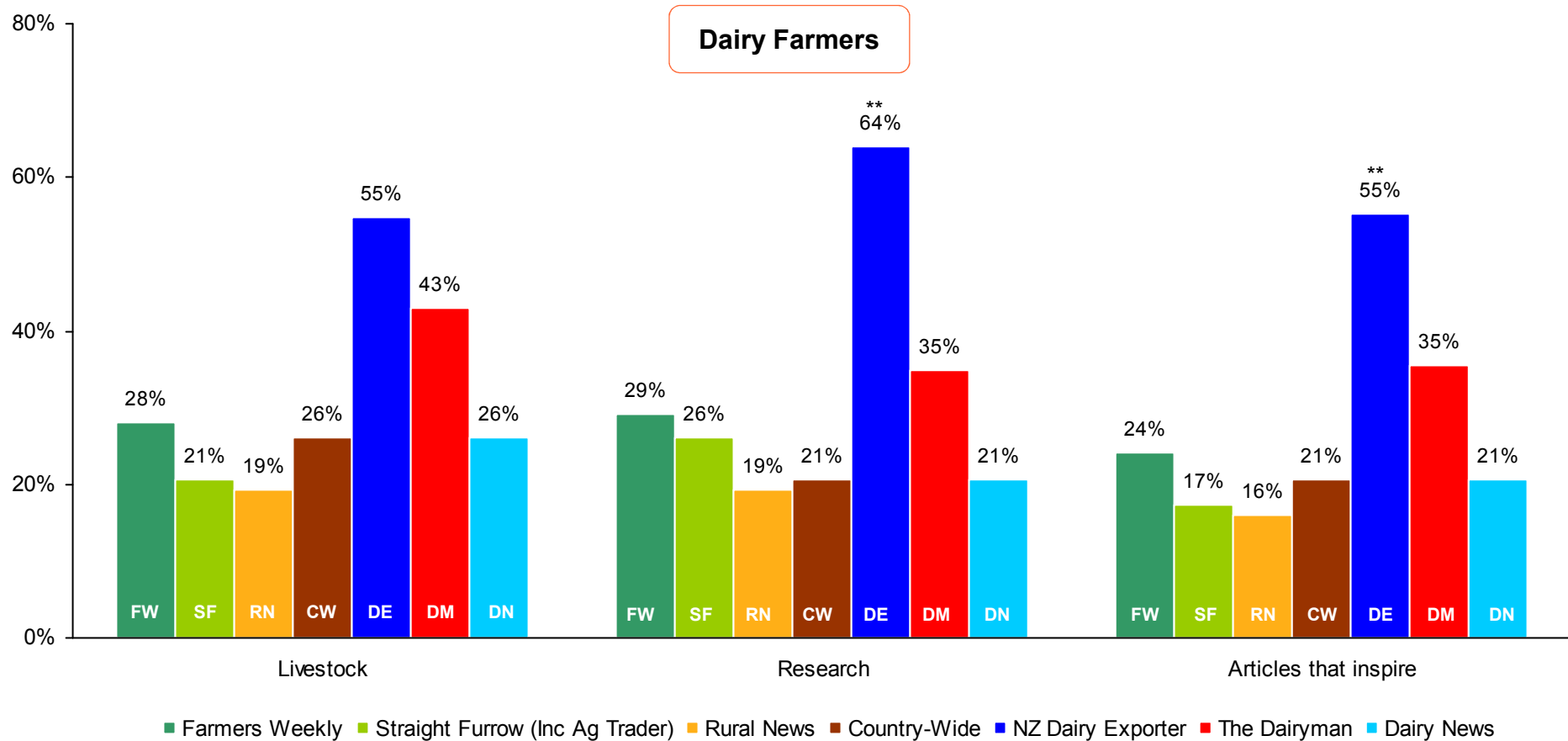


Notes: 1. Base: Dairy Farmers, n = 161; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI



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

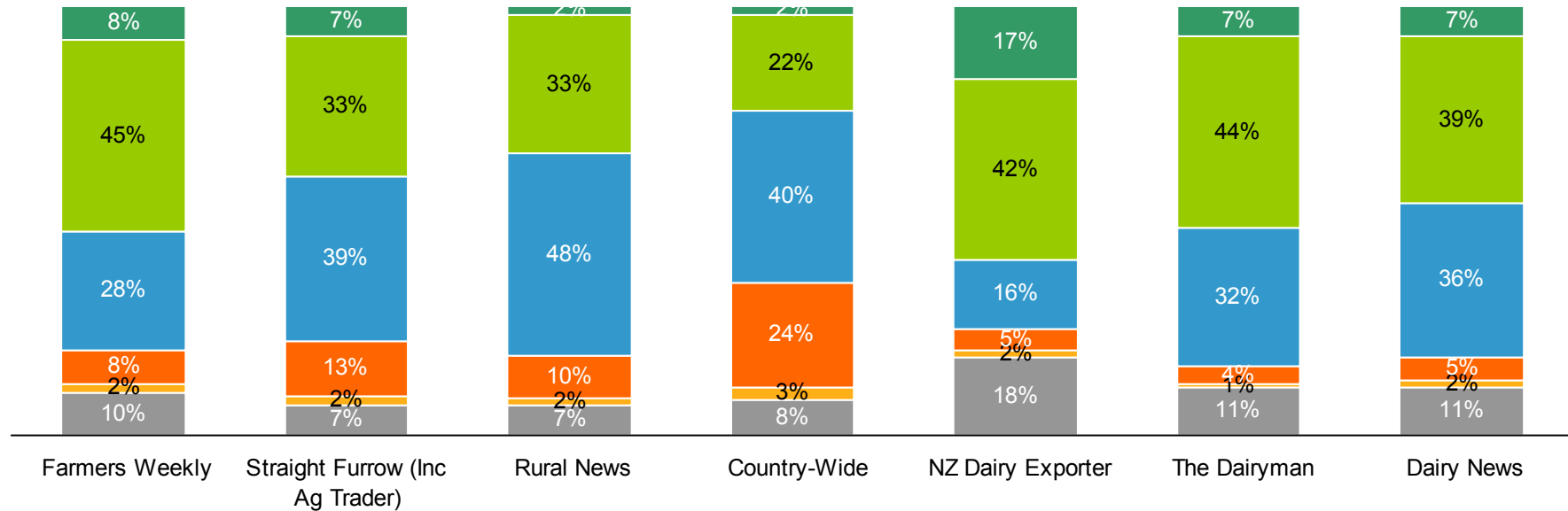


NZ Dairy Exporter is most highly regarded amongst dairy farmers as the publication that provides knowledge that helps with farming activities⁽³⁾

Publications Providing Valuable Knowledge – 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 6.5 6.1 6.0 5.4 7.2 6.6 6.5

Significantly lower than all other publications

Significantly higher than all other publications



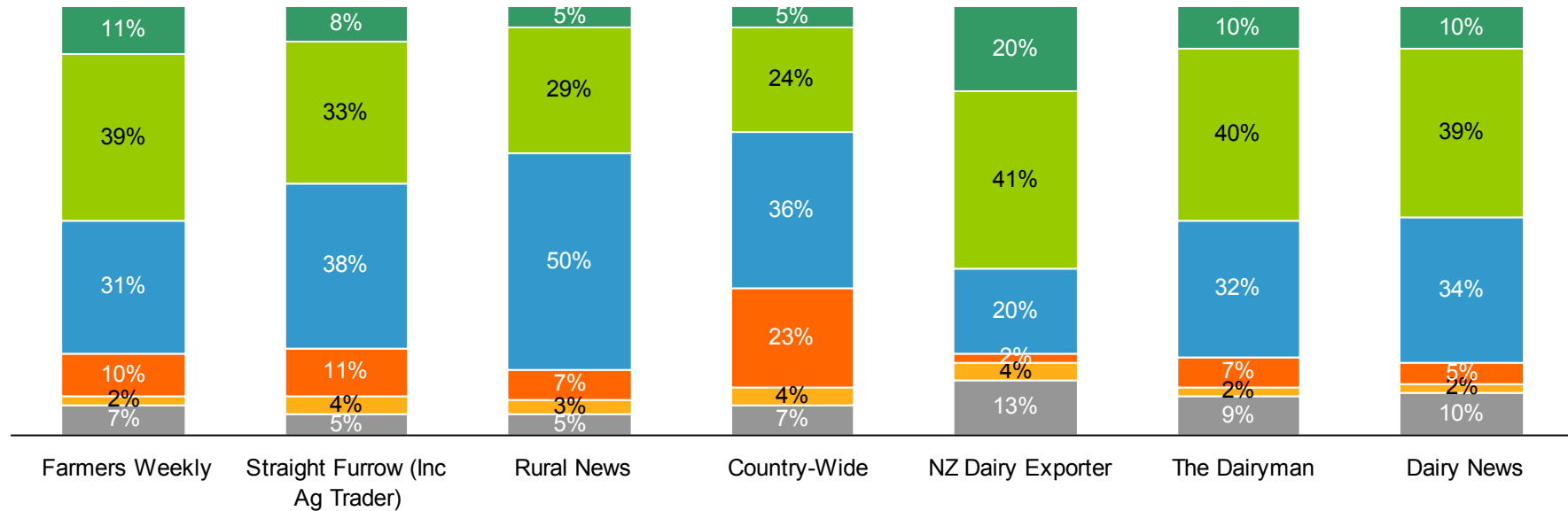
Notes: 1. Base: Dairy farmers, n = 166
 2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

Dairy farmers regard *NZ Dairy Exporter* the most highly as a publication that is 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 6.5 6.0 5.9 5.5 7.1 6.5 6.4

Significantly lower than all other publications

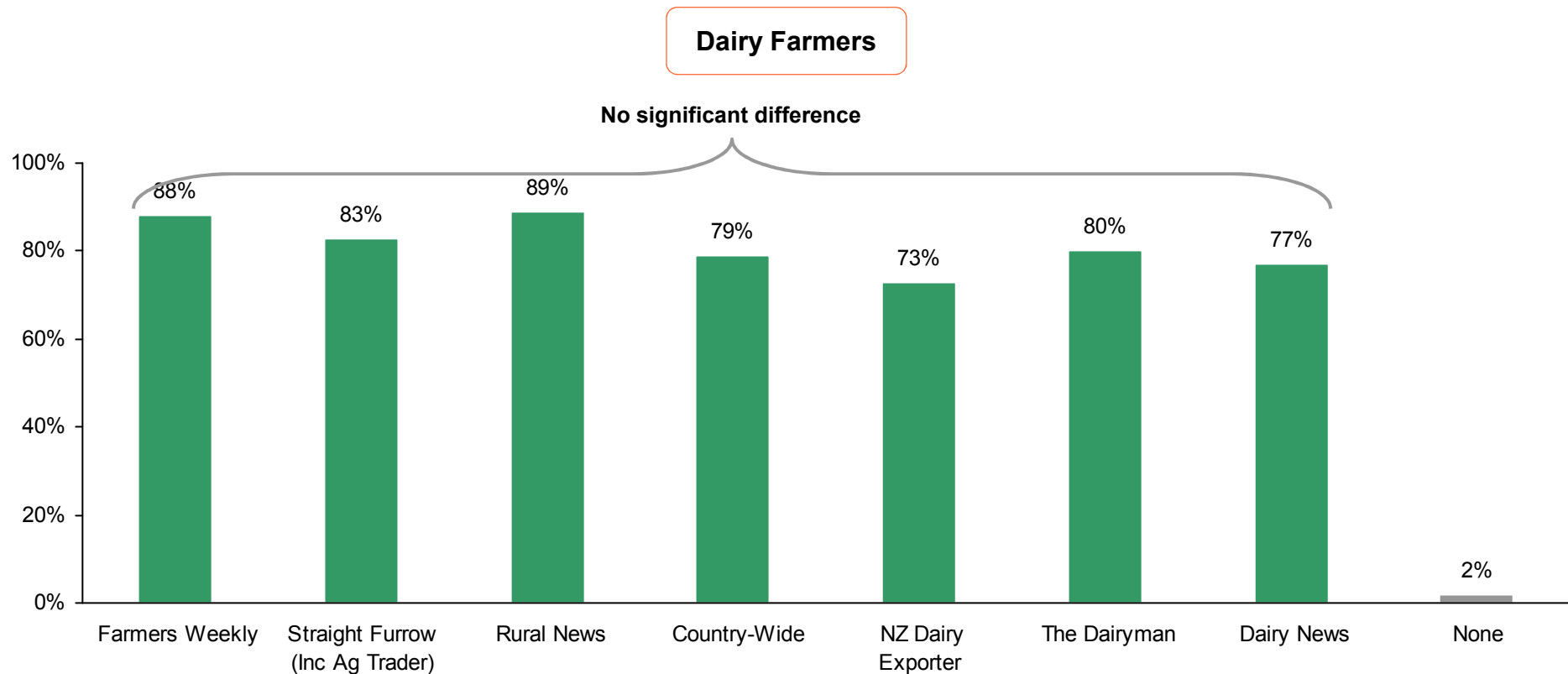
Significantly higher than all other publications



Notes: 1. Base: Dairy Farms, n = 166
 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. 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 = 166

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

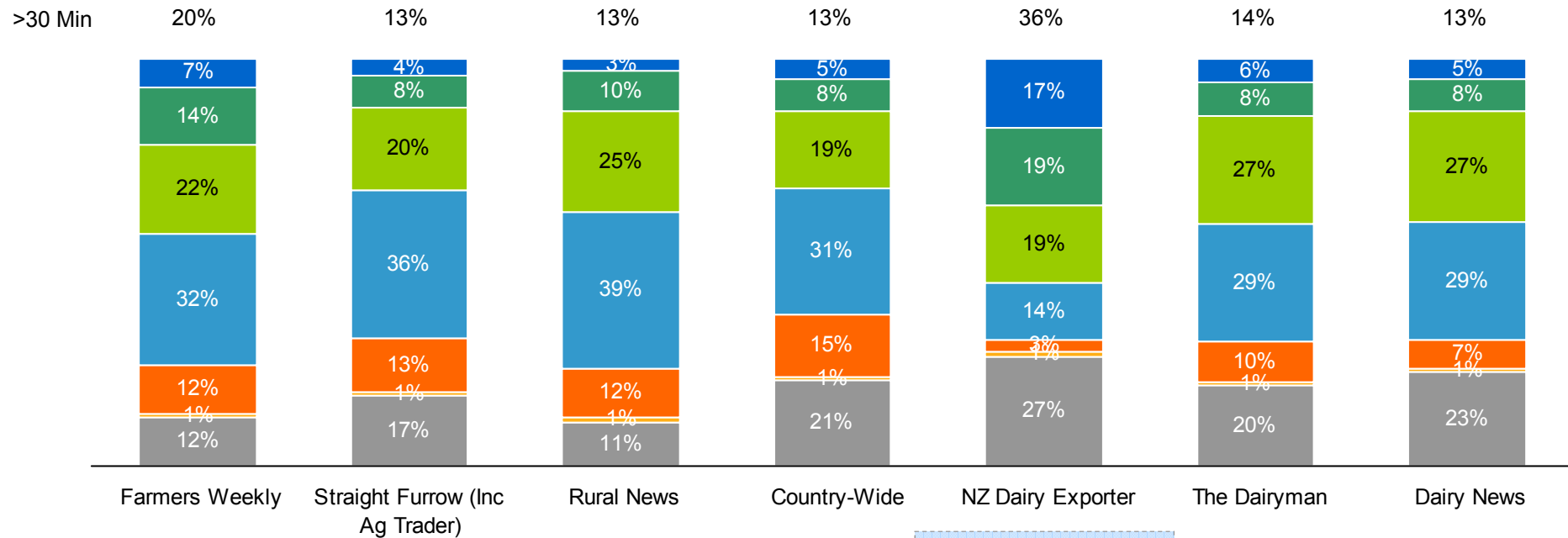
3. Significance test based on 95% CI

More farmers spend more than 30 minutes reading *NZ Dairy Exporter* than any of the other publications⁽³⁾

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

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



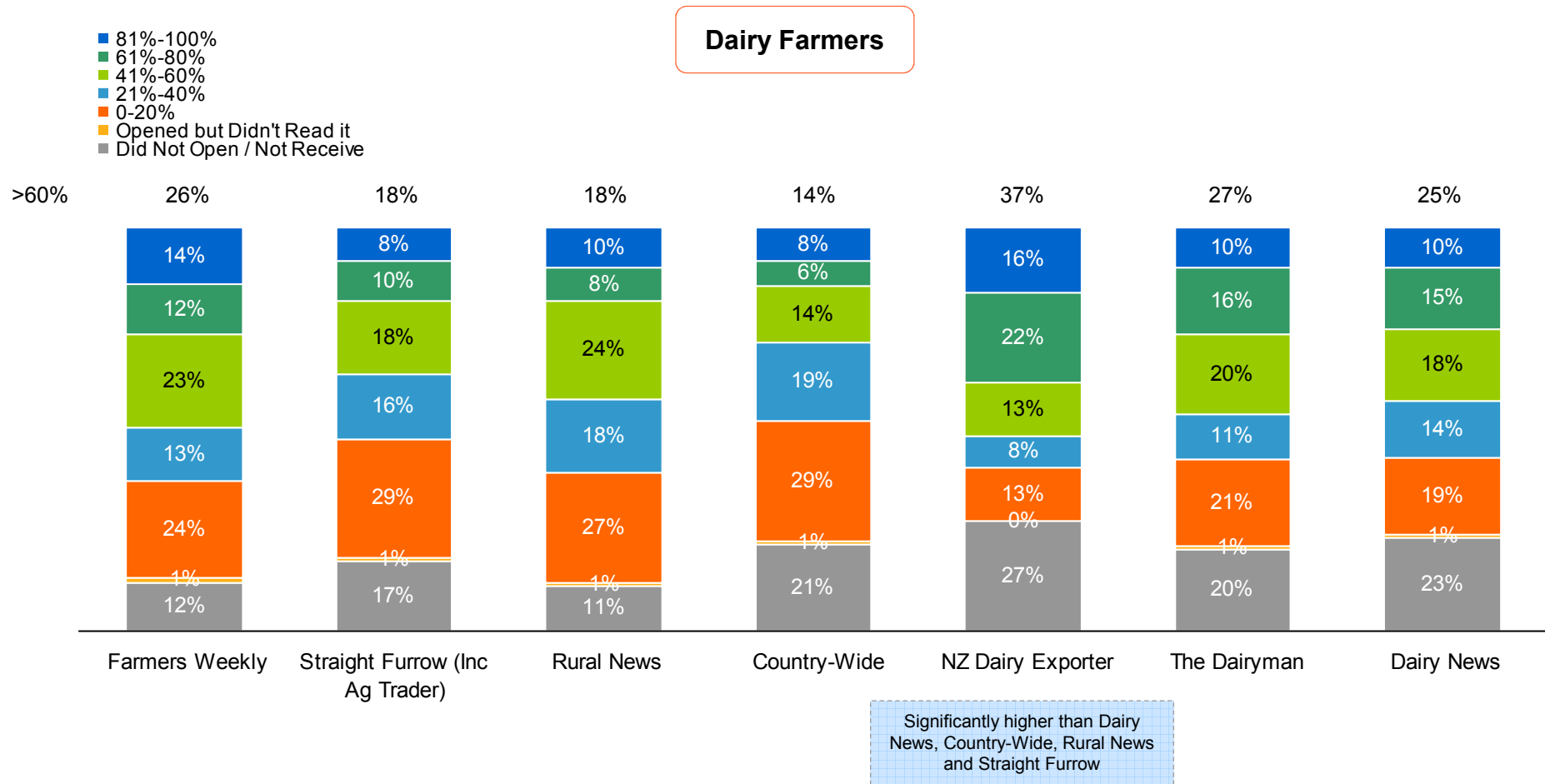
Significantly higher than all other publications



- Notes: 1. Base: Dairy n = 166
 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

More farmers also read >60% of *NZ Dairy Exporter* than Dairy News, Country-Wide, Rural News and Straight Furrow⁽³⁾

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



Notes: 1. Base: Excluding Dairy n = 166
 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

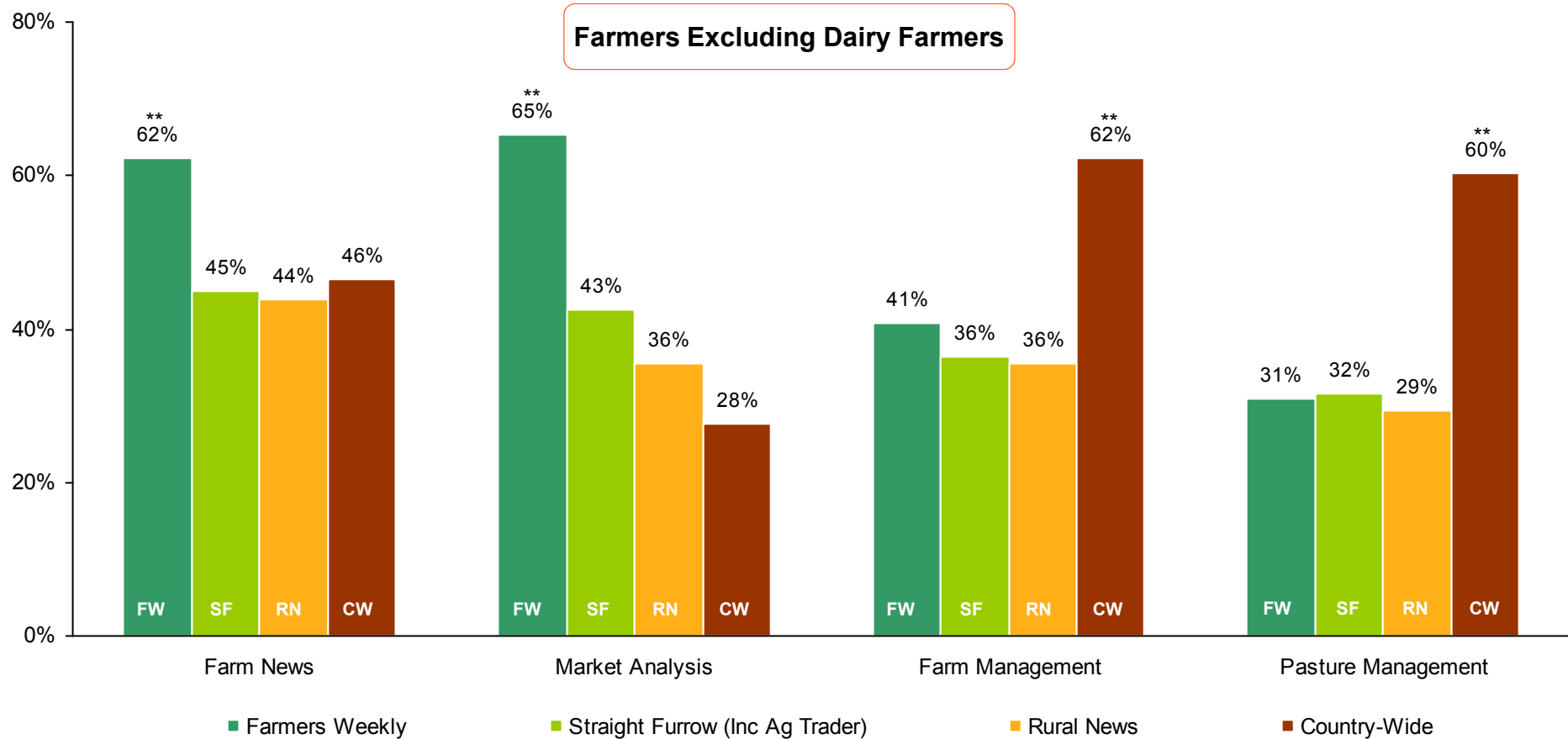
Farmers Excluding Dairy

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
 - *Country-Wide* and *Farmers Weekly* are rated higher than other publications 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 Straight Furrow
 - More farmers read >60% of *Farmers Weekly* than do *Straight Furrow*

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⁾

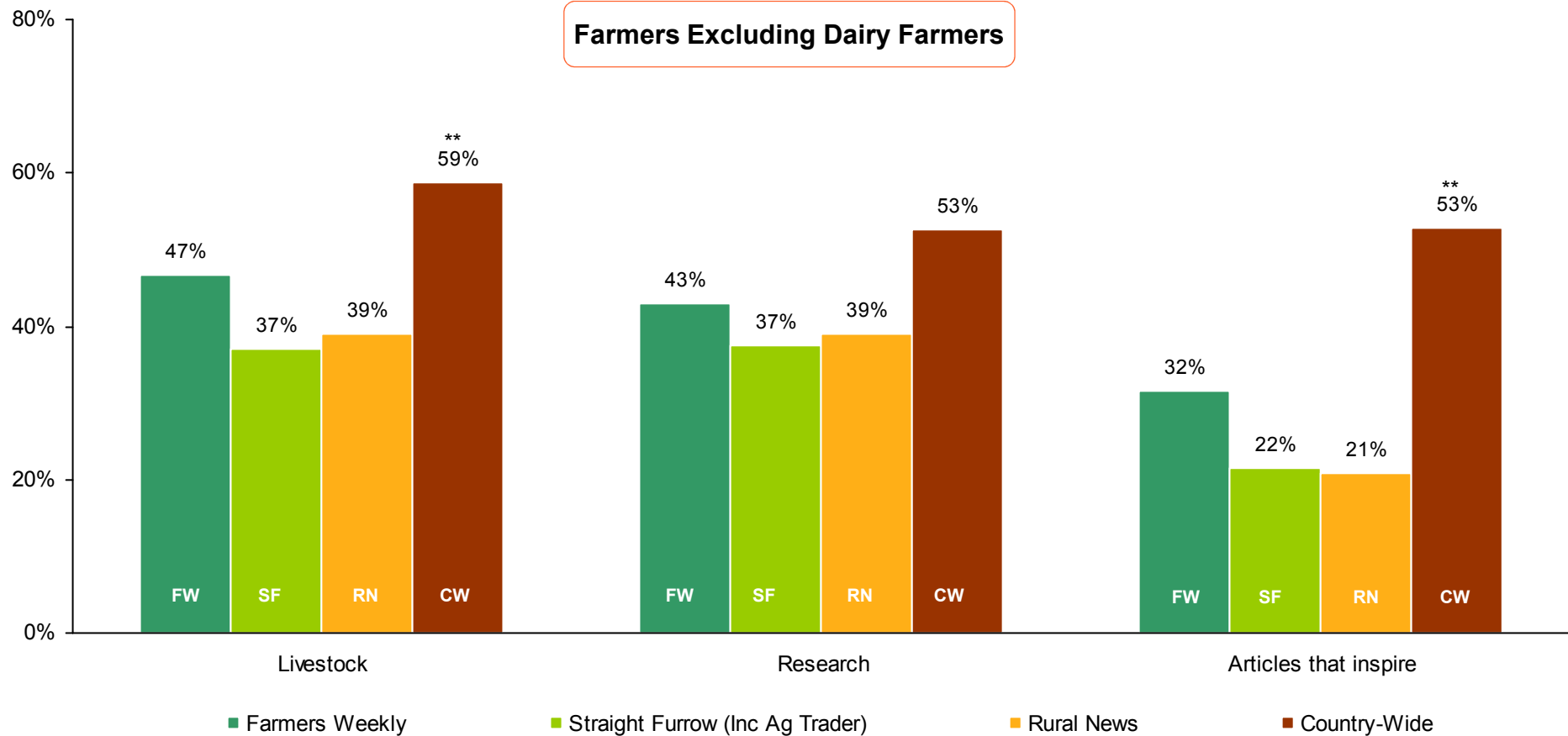


Notes: 1. Base: Farms excluding Dairy Farms, n = 289; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI



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, n = 289; September 2010
 2. What magazines or publications do you most associate with each statement?
 3. ** Result is statistically significant based on 95% CI

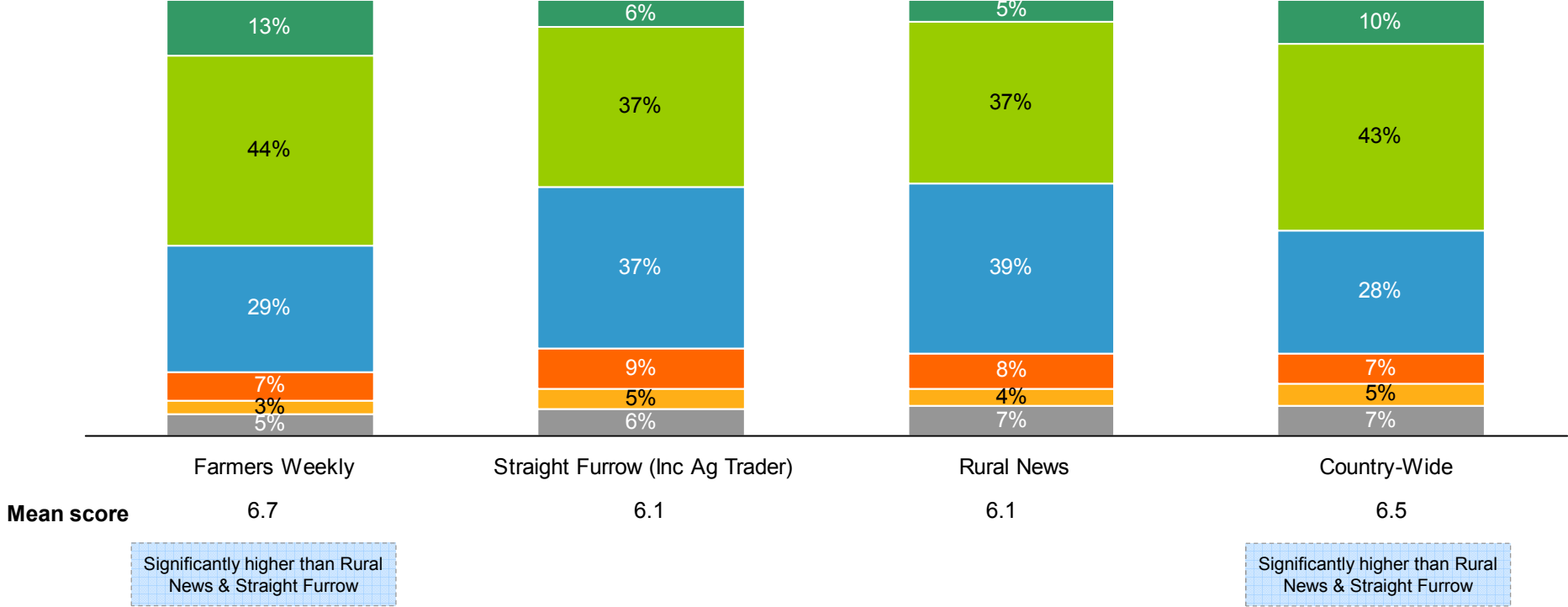


Excluding dairy farmers, *Country-Wide and Farmers Weekly* are rated more highly than Rural News and Straight Furrow for providing knowledge that helps with farming activities⁽³⁾

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



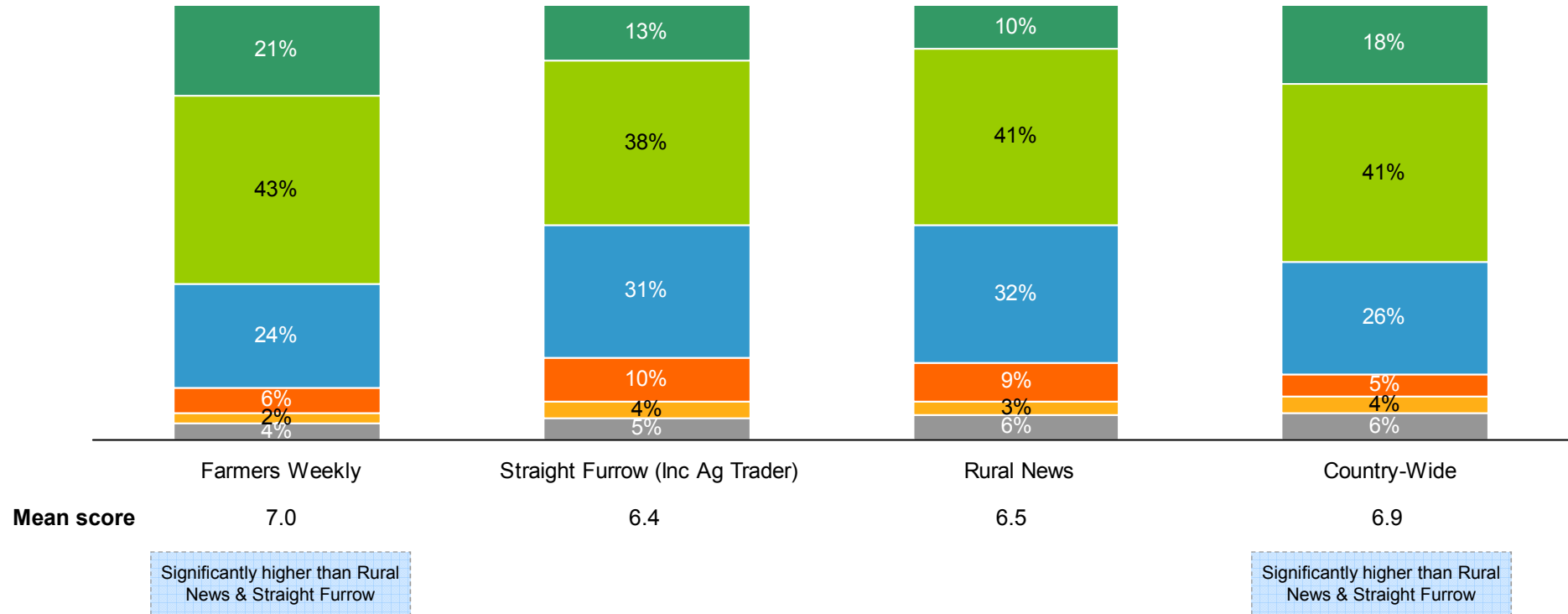
Notes: 1. Base: All farms, Excluding Dairy n = 284
 2. In terms of providing knowledge that helps you on your farm, how good is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

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* or *Rural News*⁽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

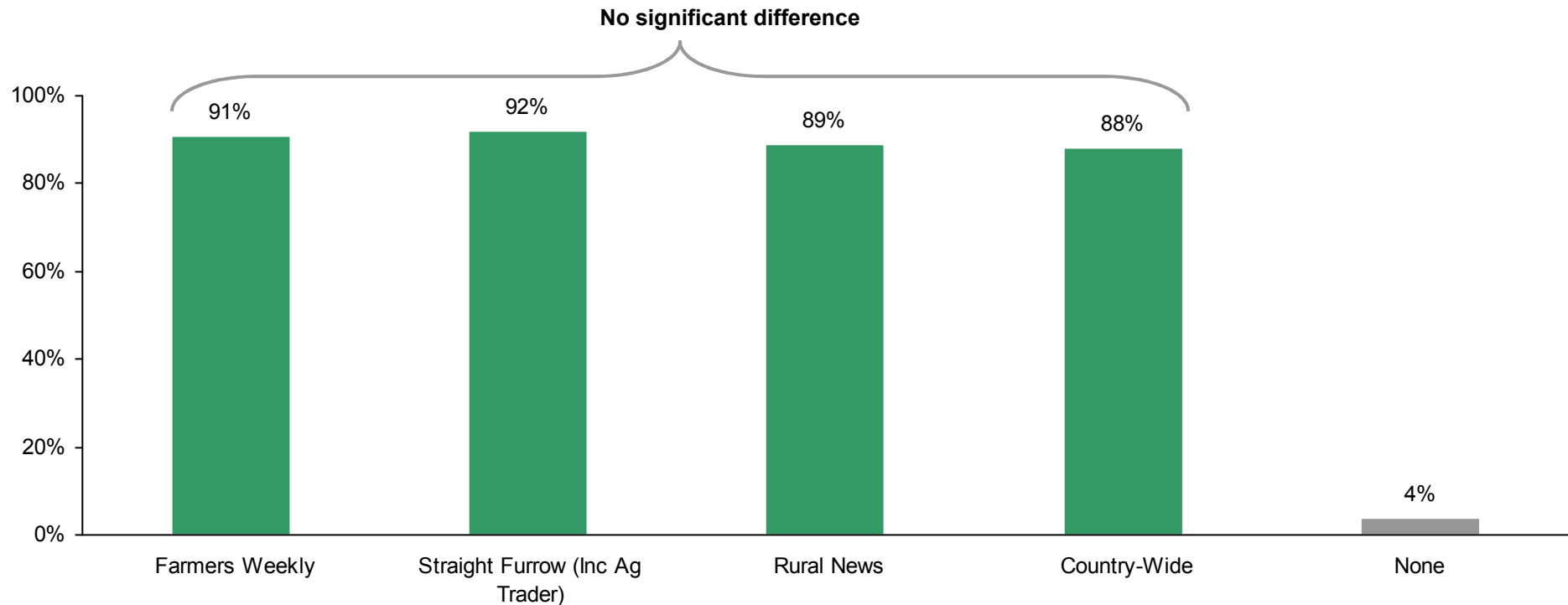


Notes: 1. Base: Farms excluding Dairy Farms, n = 284
 2. In terms of being worthwhile reading, how worthwhile is [PUBLICATION]? (1-10 scale)
 3. Significance tests calculated on mean scores using a 95% CI

Excluding dairy farmers, there is not a significant difference in the proportion that at least open each publication delivered. 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 = 284

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

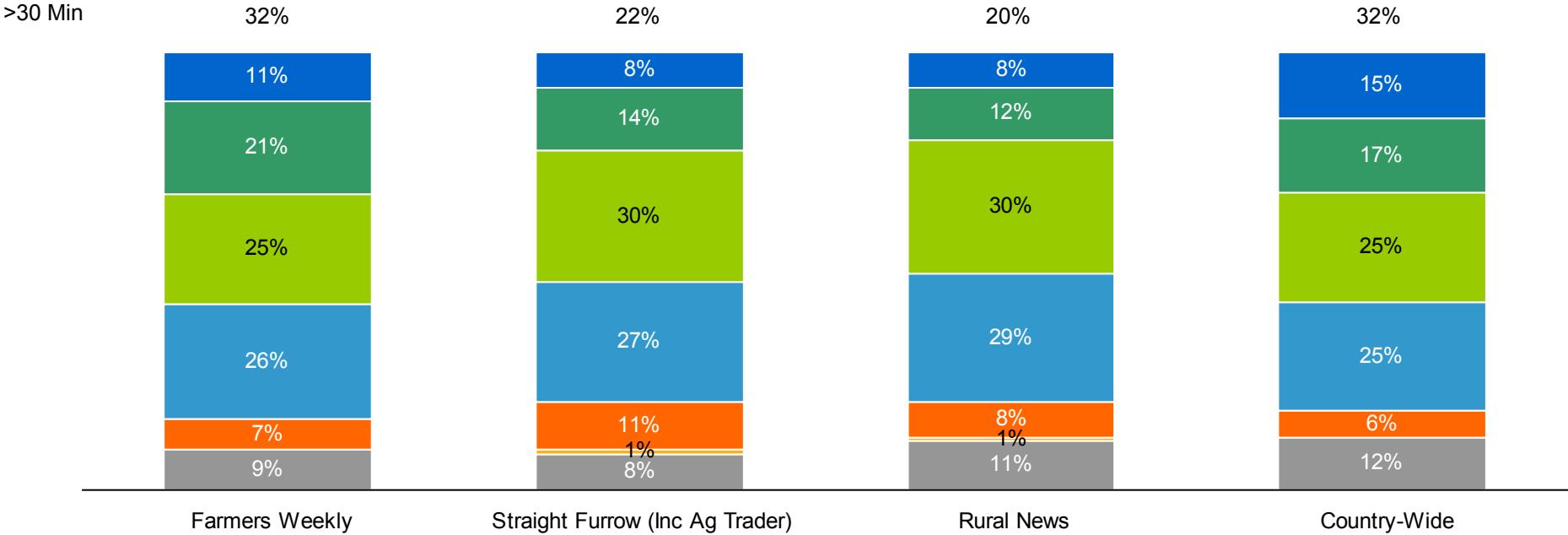
3. Significance test based on 95% CI

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

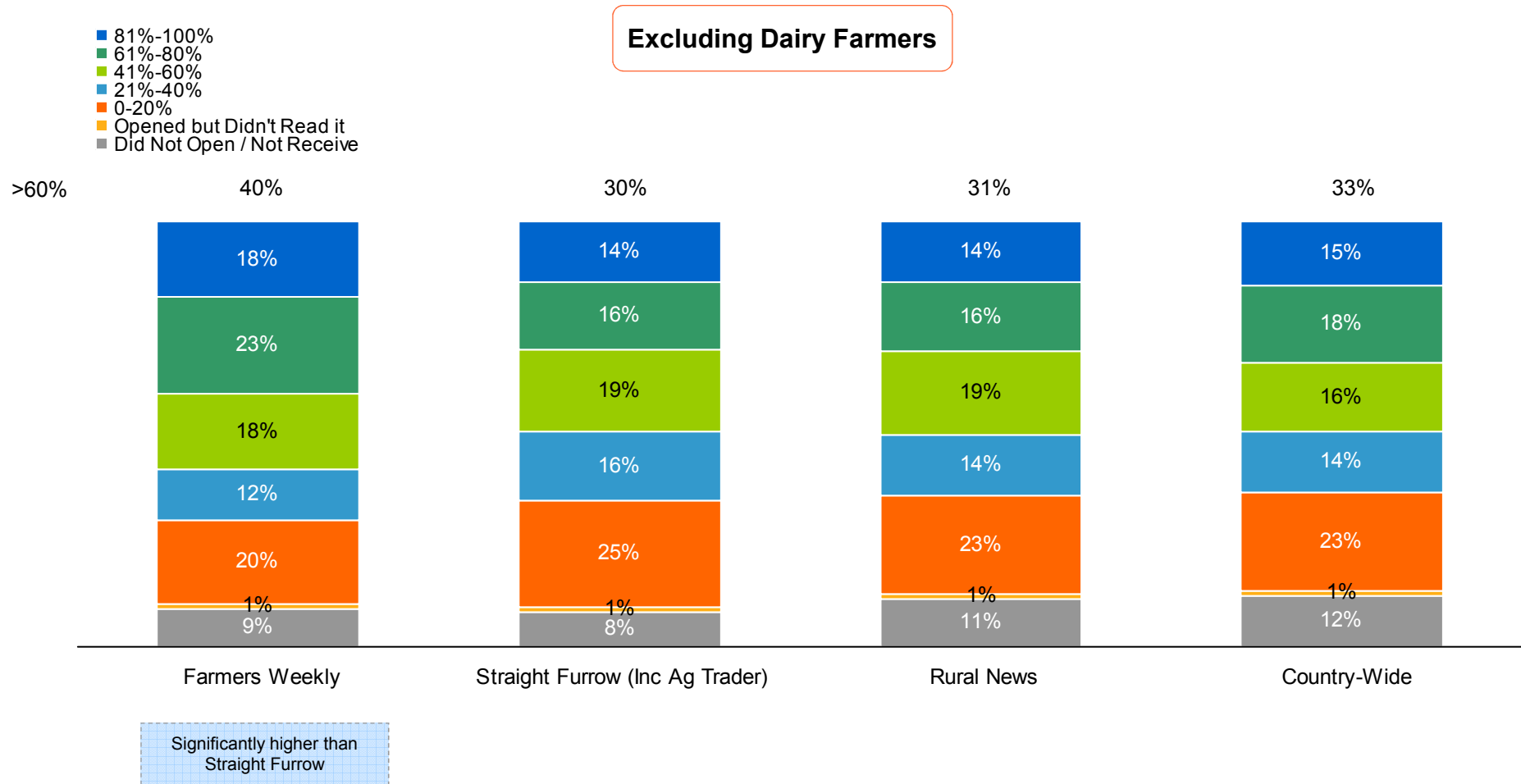
Significantly higher than Rural News & Straight Furrow



Notes: 1. Base: Excluding Dairy n = 284
 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 Straight Furrow⁽³⁾

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



Notes: 1. Base: Excluding Dairy n = 284

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

Variance Analysis explanation

- 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

Technical

- 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 December and 14th December 2010 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 the 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)