



2023

NAFB LISTENERSHIP

OBJECTIVES

- 1 Examine the habits and practices of those who consume ag radio programming
- 2 Inform future strategies for sales and programming



STUDY SUMMARY

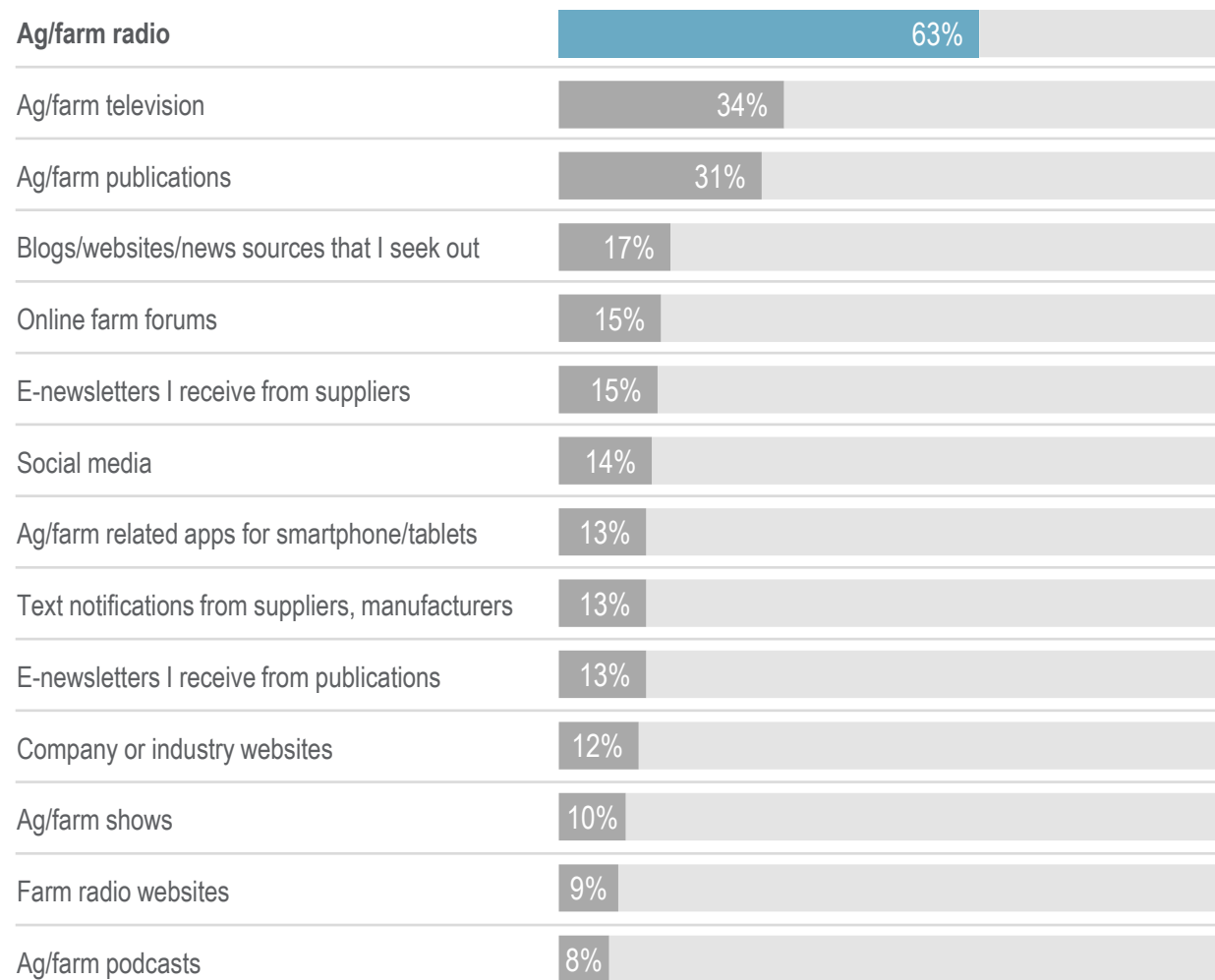
- > 357 phone interviews during Summer 2023
- > Nationwide sample of decision-makers on operations of \$100K+ GFI
- > Regularly consume ag radio content





CONTENT & CONSUMPTION

Daily Sources of Ag News



Ag radio is the leading daily source of farm news

Listeners tune into ag radio for timely information **every day**. The type of content ag radio provides (weather, markets and news) lends itself to daily consumption.

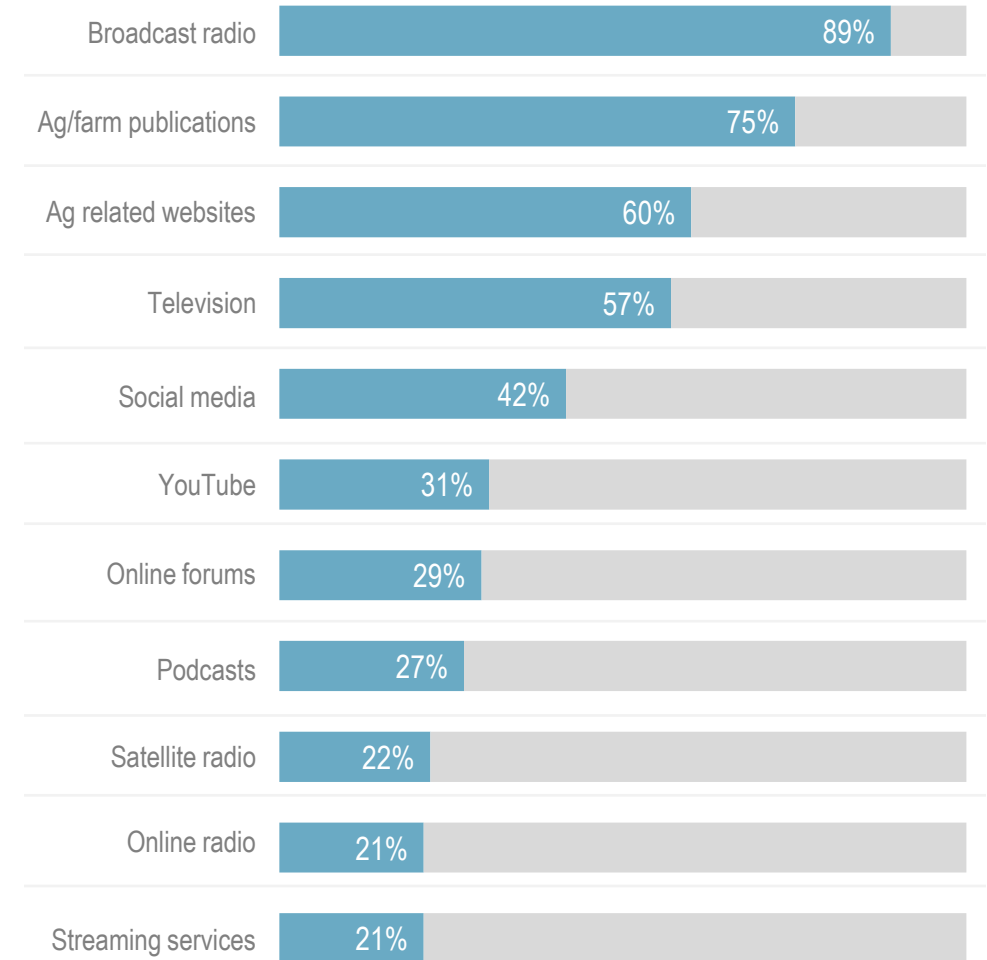


Ag broadcast radio is the number one source for farm news among listeners.

Those who regularly listen to ag radio content are also engaged in other media channels to keep up to date with farm news, weather, markets, and ag info.

On average, respondents utilize several informational sources.

Sources of Farm News



QUAL INSIGHTS

Media & Information Sources

Listeners rely on a wide range of sources - news, radio, podcasts, social media, and connecting with peers.

They are always trying to gather information to make them better at all the various aspects of their job.

Information Sources

There is a wide range of ag information that they rely on, including radio broadcasts, farm magazines, podcasts, YouTube videos, newsletters, and specific online platforms.

They leverage these sources to stay informed and gain knowledge about farming practices.



... I don't go anywhere without turning my radio on in my truck...And I still listen a lot to that local radio station to get the weather, the news, and their spin on it.

– Farmer Listener from Illinois

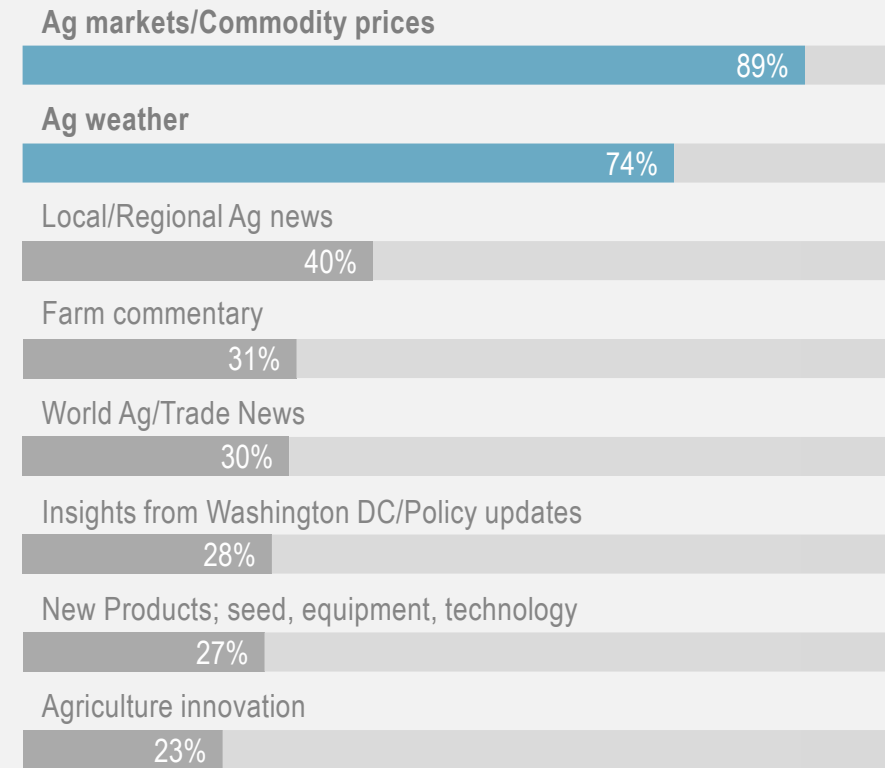


Listeners look to ag radio for info that directly impacts their operations.

While listeners rely on ag radio for info on a variety of topics, **market info and commodity pricing**, as well as **weather** are the two most pertinent topics for ag radio listeners.

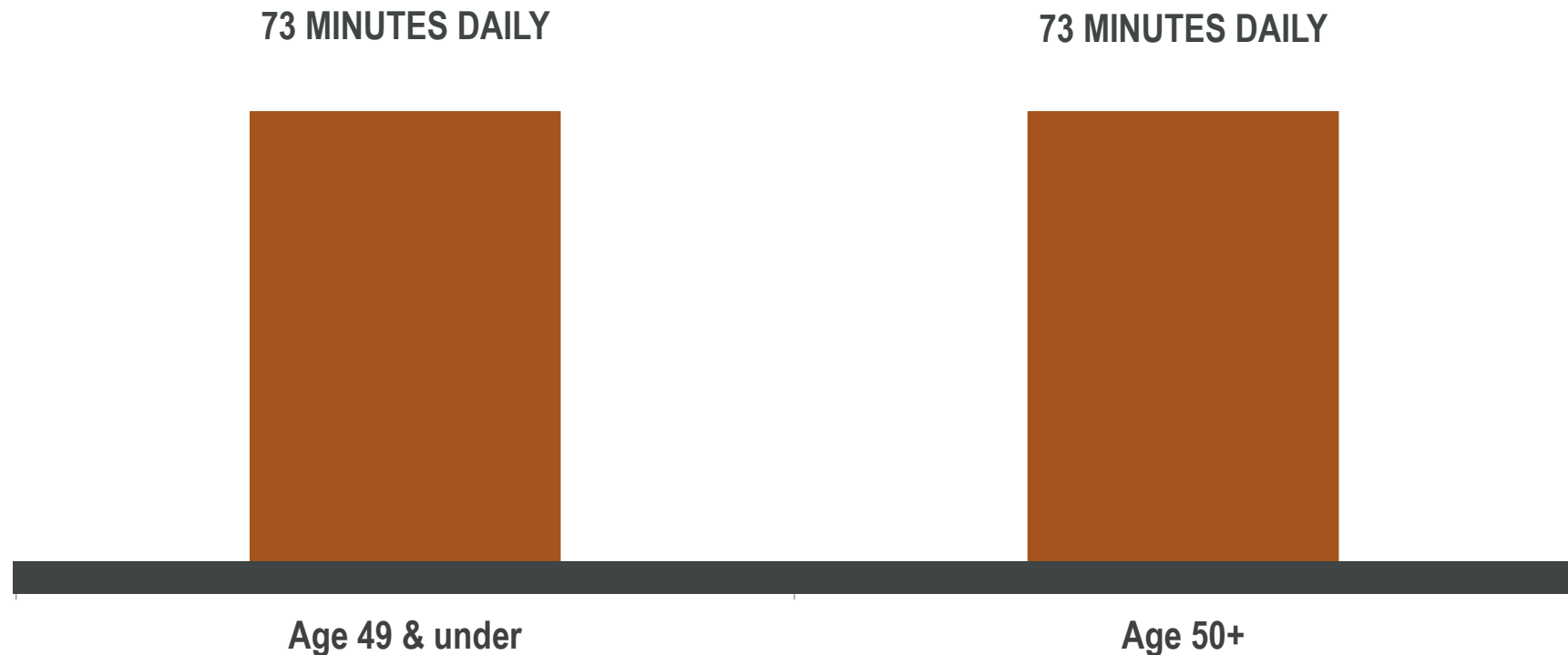
These are the two most relevant areas of ag radio content regardless of **age**, **GFI**, or **operation size**.

Info Desired from Ag Radio



Next Generation Farmers Listen to Radio

**NEXT-GEN AND CURRENT-GEN FARMERS
LISTEN TO THE RADIO EQUALLY THROUGHOUT THE DAY**



Ag Radio is #1 Weekly Platform for Larger Growers

92.5%

of 500+ acre farmers
listen to their favorite
local radio stations
each week

In fact,

32.9%

of 500+ acre farmers
listen to radio
at any given time
during the day,
Monday-Friday 5 a.m.- 7 p.m.

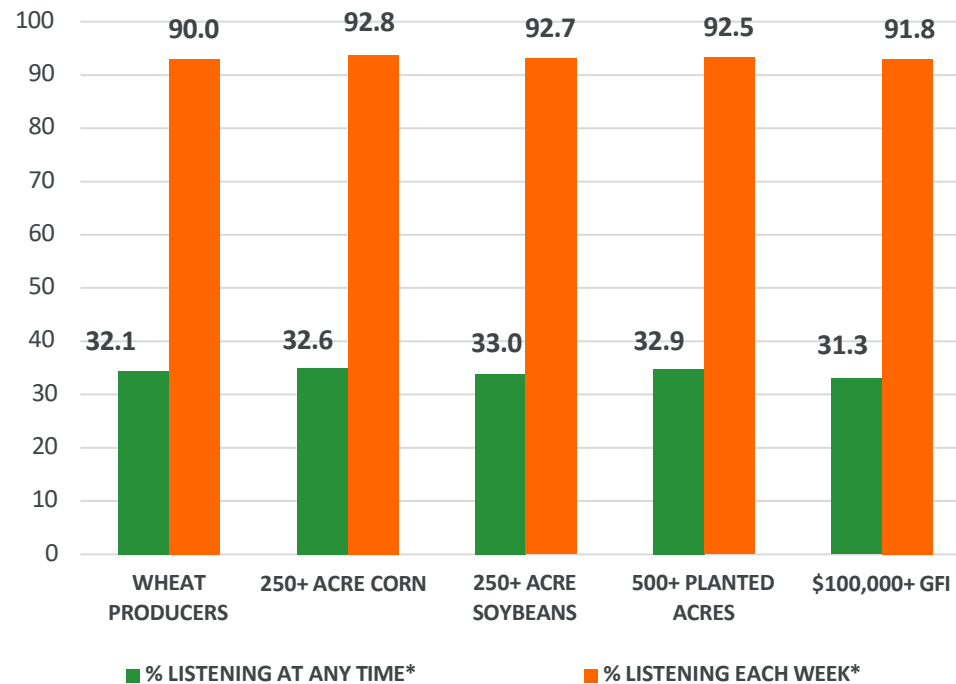
Large Operation Farmers Listen to Radio

More than **91%** of 100K+ GFI farmers **listen to AM/FM radio** each week and 92% with 500+ acres

*On average **one** out of **every three** listen to radio at any given time during the week*



Large Acre Farmers are Heavy Radio Listeners M-F 5A-7P



Source: 2022 AMR Radio Ratings, M-F 5a-7p, IA-IL-IN-KS-MI-MN-MO-NE-OH-ND-SD-WI

QUAL INSIGHTS

Trust

They deem it important to have trust in the information they receive and indicate they have confidence in farm broadcasters as trusted sources of information who provide accurate and unbiased news.

There is an appreciation for farm broadcasters' role in sharing market updates and global events.

“

(Farm) Broadcasters are trusted friends. I truly believe that they want to tell you the true story. The right story. Without any bias.

– Farmer from South Dakota

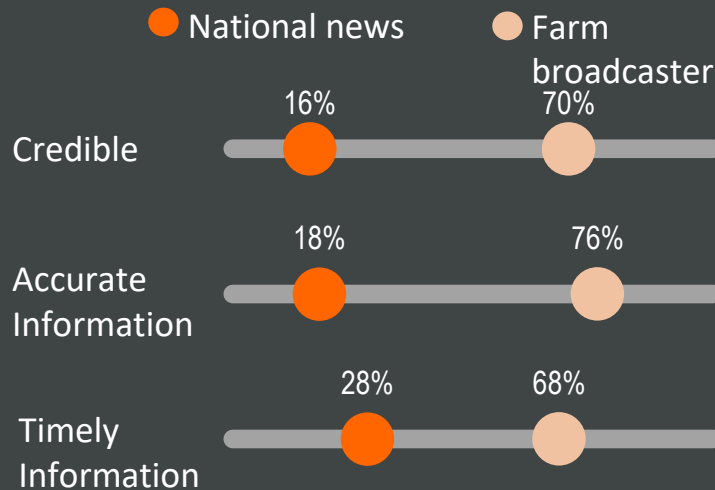


Farmers Trust Ag Broadcasters

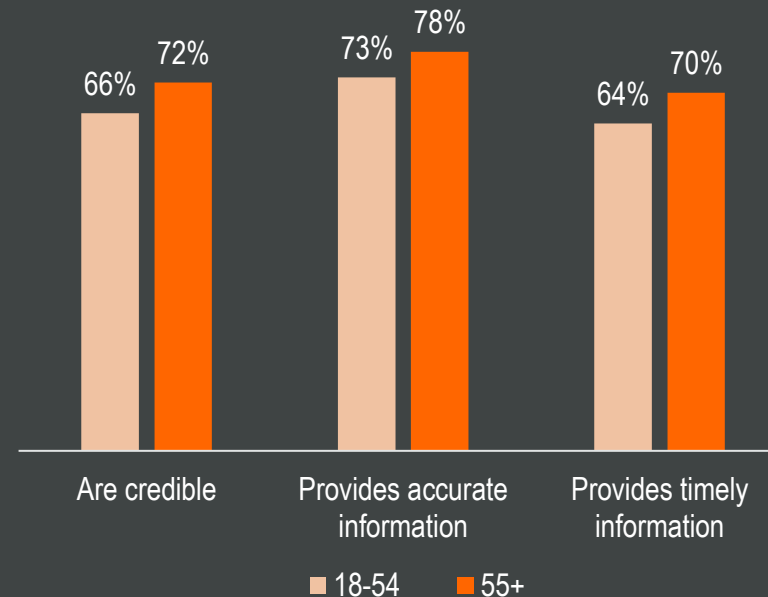
Farm broadcasters dramatically outperform national news media (NBC, CBS, etc.) in the areas of **credibility**, **accuracy**, and **timeliness**

(Farm) Broadcasters are trusted friends. I truly believe that they want to tell you the true story. The right story. Without any bias. - Farmer from South Dakota

Perceptions of Media*



Ag Broadcaster Credibility





ADVERTISING EFFECTIVENESS

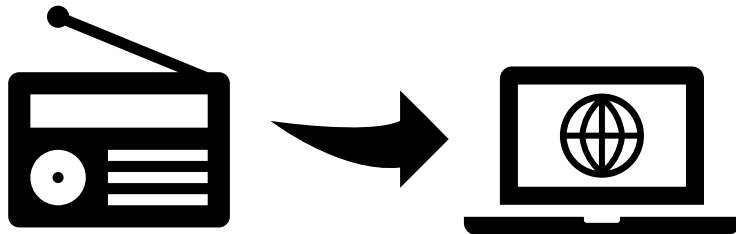
Ag Radio Drives Listeners Online

Research shows,

58%

of farm radio listeners have visited a website after hearing advertiser messages on radio

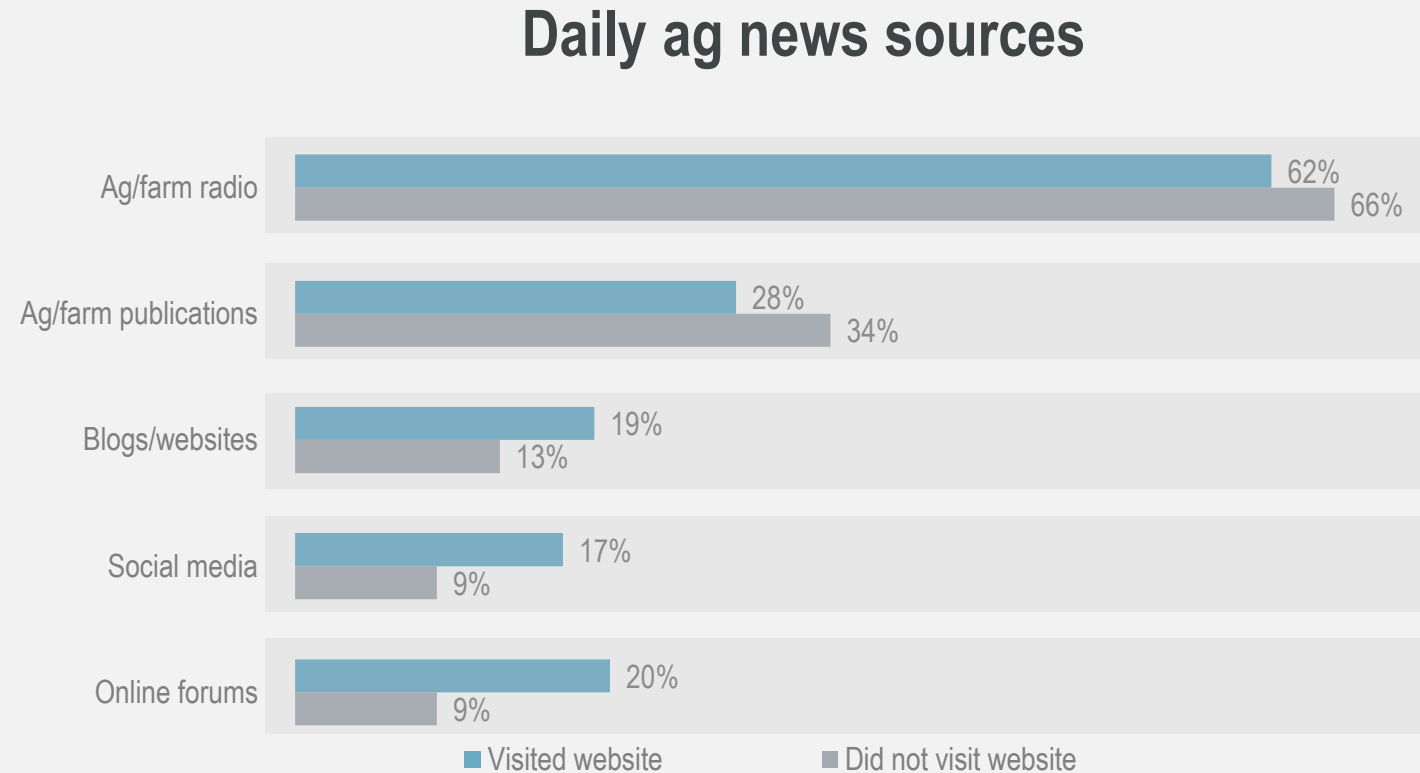
And, it's even higher for farmers 18-54,



71%

visited websites after hearing messages on radio

Those who visited a website after hearing about it on the radio are more likely to access digital, non-digital news sources.

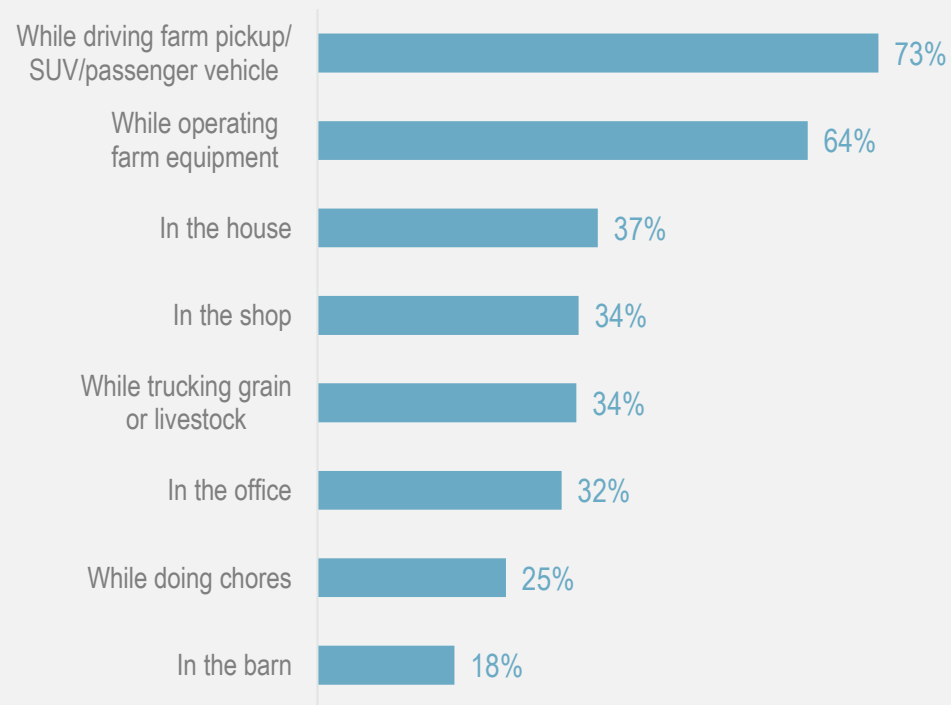




LISTENING HABITS

Traditional AM/FM radios have extensive reach throughout farming operations

Where Listen to Ag Radio

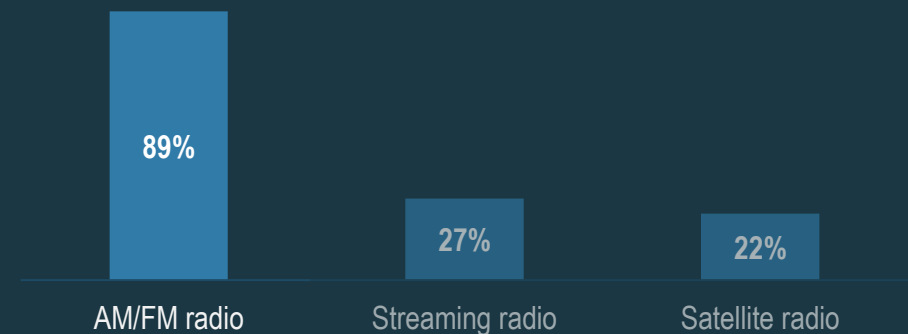


The average listeners' farm contains nearly 11 radios with more than half having 20+

Because AM/FM radios are a standard feature of on-farm infrastructure, ag programming can **easily** and conveniently **reach** listeners at **various times and locations**.

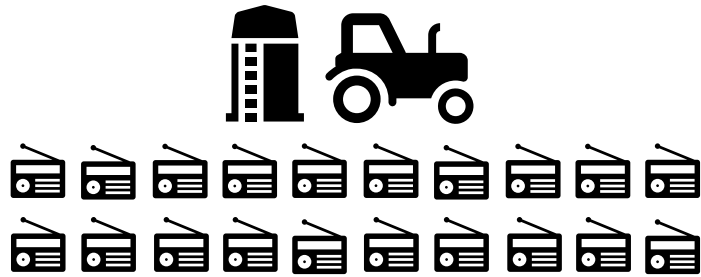
AM/FM radio broadcasts are prevalent throughout farms. Farmers listen to broadcast ag radio in a **variety of locations and situations**. This is made possible by the large number of radios that can be found throughout farming operations.

Types of Radio Use for Farm News

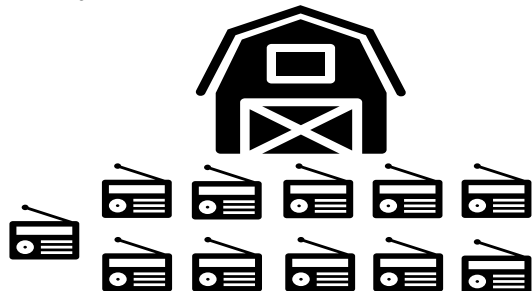


Radio Rules the Farm

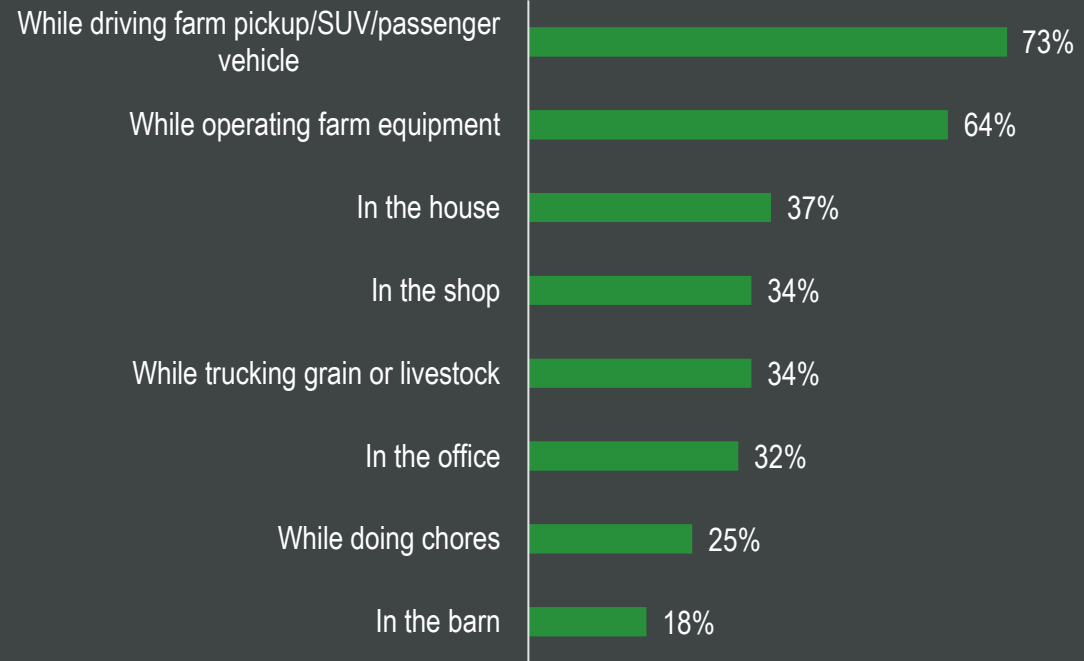
Over half of listeners' operations boast **20+ radios**.



The average listener's farm contains nearly **11 radios**.

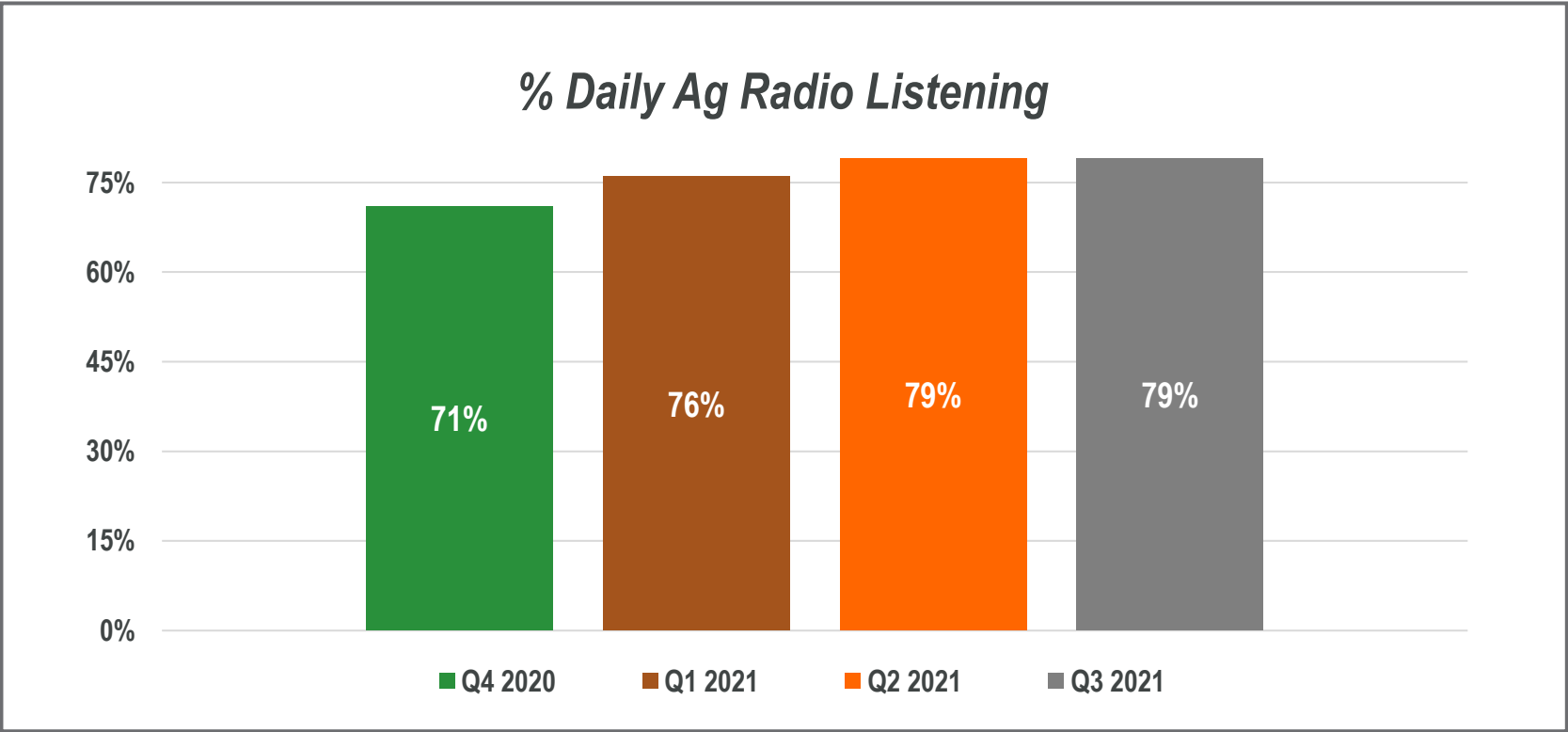


Where They Listen



Farmers Rely on Radio Throughout the Year

Ag radio gives immediate information that is easily accessible in a way no other medium can provide.



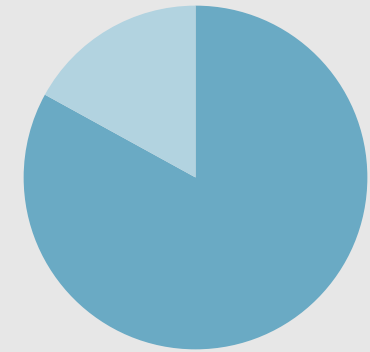
Source: 2021 Aimpoint NAFB Listenership Study

On-air ag radio is a major part of listeners' weekday routine.

Those who **listen to AM/FM radio for ag programming do so on most days** with a large majority (83%) listening at least 5 days per week.



5+ Days a Week



83%



Listeners start each morning by tuning into ag radio for the day's most important information.

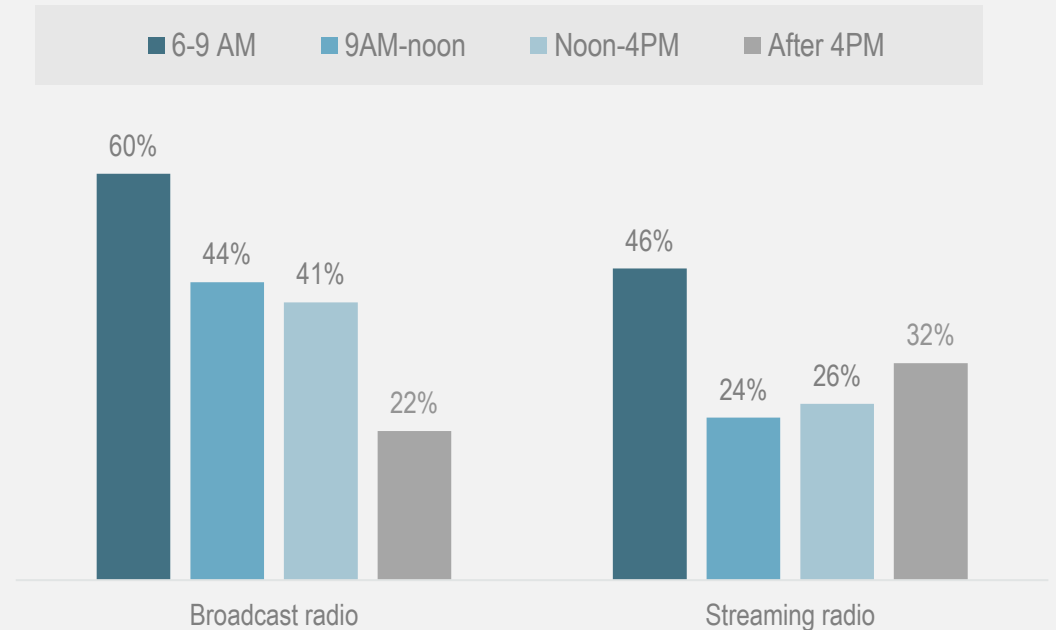


Listening to on-air ag radio is a **key ingredient** to farmers morning routine.



This pattern holds for both AM/FM and streaming radio.

Time of Day Listen to Ag Radio Programming





DIGITAL MEDIA CHANNELS

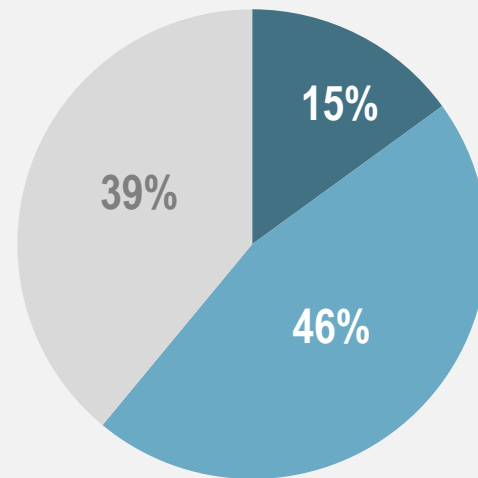
Listeners use digital media channels to gather ag-based information.

Portion of Content Consumed that is Ag-related

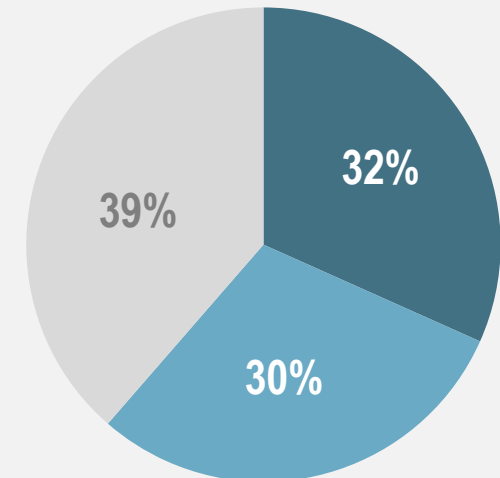
● All Ag-related ● Most Ag-related ● Half or less Ag-related



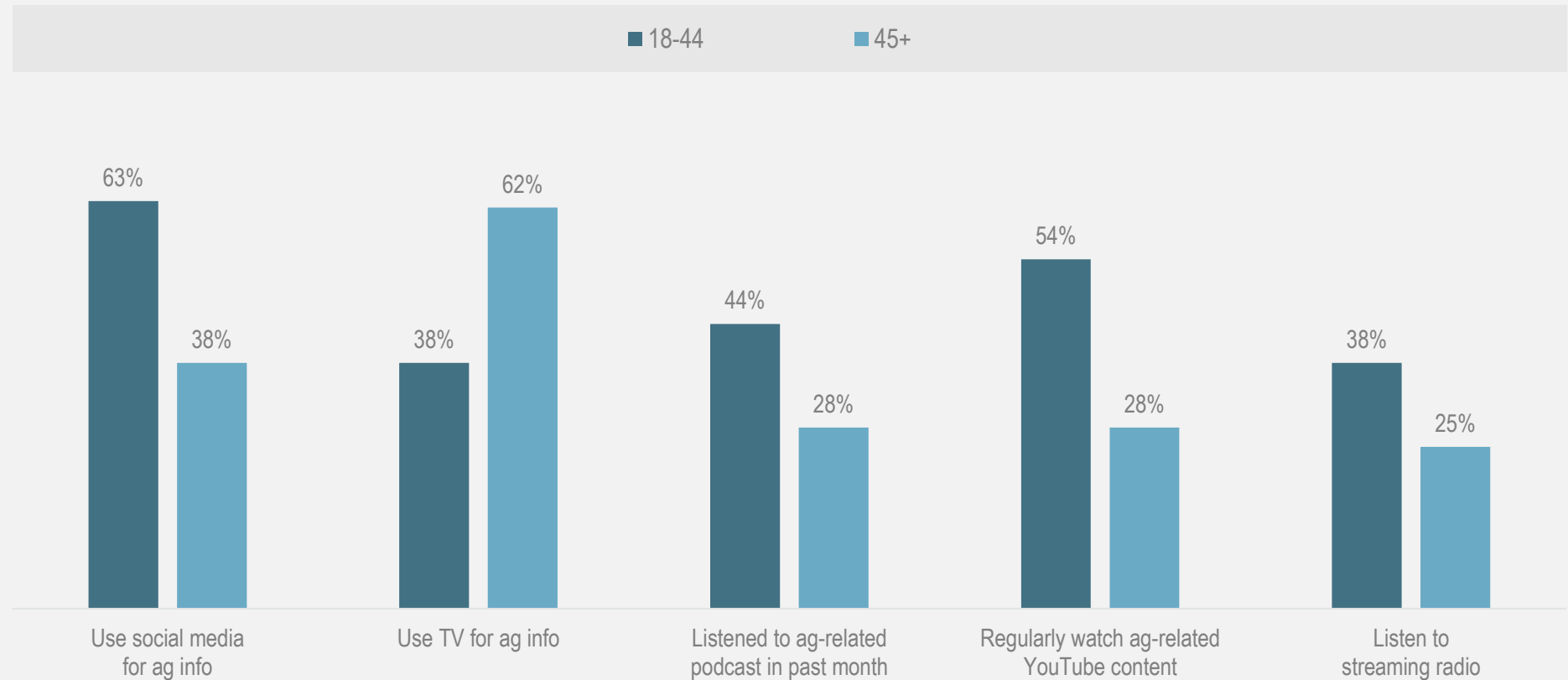
YouTube



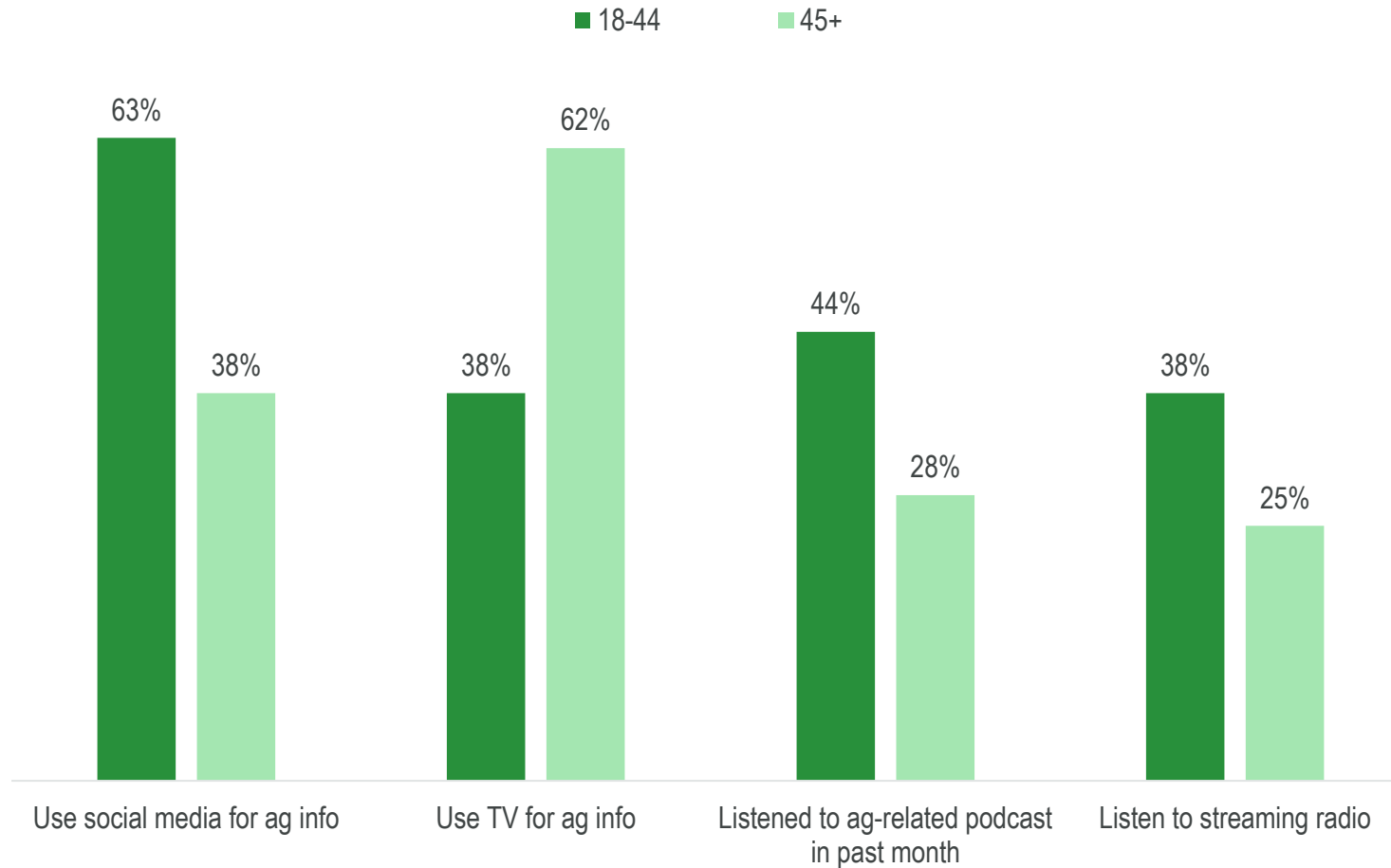
Podcasts



Younger listeners are more engaged in digital media channels than their seasoned counterparts.

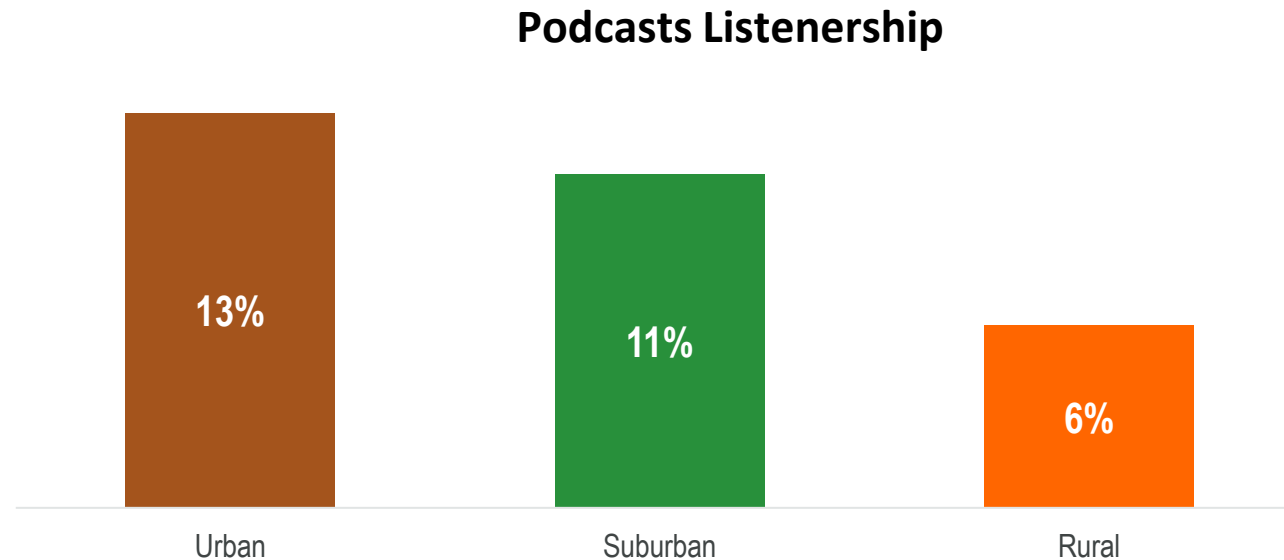


Farm Radio Listeners' Digital Media Usage



Podcast Listenership

Urban dwellers exhibit a stronger inclination towards podcasts, spending **13%** of their daily audio time on this format – **more than double the percentage** seen among rural listeners, who allocate just **6%** of their time to podcasts.



A close-up photograph of a hand holding a small amount of dark soil. A tiny green seedling with two leaves is growing out of the soil. The background is dark and textured, suggesting more soil or a garden bed. A diagonal white line runs across the image from the top left to the bottom right. The text 'KEY FINDINGS & RECOMMENDATIONS' is overlaid in white on a dark teal background in the bottom left corner.

KEY FINDINGS & RECOMMENDATIONS



KEY TAKEAWAYS

- 1 Ag radio is a trusted resource for commodity prices and weather.
- 2 Among listeners, tuning into ag radio in the morning is a key part of their daily routine.
- 3 Broadcast ag radio's widespread physical presence on farming operations gives it a competitive advantage in terms of reach.
- 4 Digital online media consumption of ag-content through YouTube, podcasts, and streaming radio is more prevalent among younger farmers.
- 5 Ag radio drives engagement with websites mentioned on the air. This is especially the case for listeners who are more digitally engaged and younger.



RECOMMENDATIONS

- 1 Continue to focus on key content of News, markets, and weather
- 2 Focus ad sales message on broadcast radio's unique physical reach and the routine nature of its listenership.
- 3 Be mindful that younger listeners are more digitally engaged than their older counterparts.



“

Sometimes guys like me are working alone in the shop or you're in the tractor wondering if you're the only one having the problems or facing the challenges you're facing. Then you tune in to ag media (radio) and you hear other people like you talking about having the same problems and it gives me comfort knowing I'm not alone. And they have advice and information that helps me. Maybe I'm thinking about biologicals and whether I should try them, I can go look up recent podcasts or broadcasts or articles and that gives me a start.

Farmer from Ohio





CURRENT ENVIRONMENT

Newspapers Vanishing

Rural areas are the most affected.

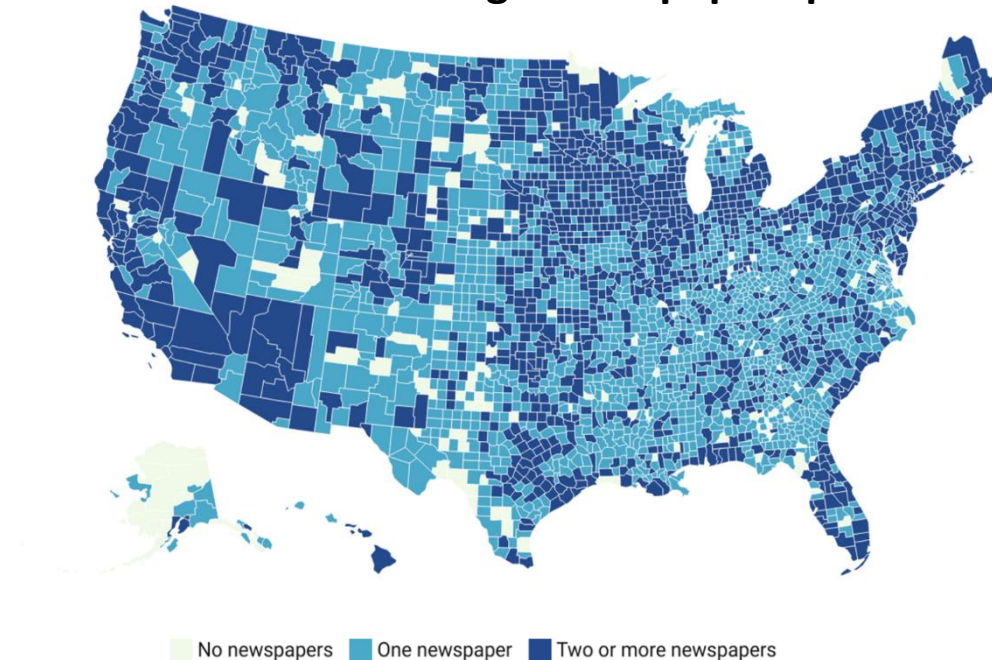
Urban and suburban areas have digital news replacing traditional newspapers – this is **less common in rural areas.**

Since 2005, **over a quarter** of newspapers that have been **permanently shut down** were in mostly **rural counties.**

1/3

The U.S. is on track to lose one-third of its newspapers by 2025.

The US is losing 2 newspapers per week

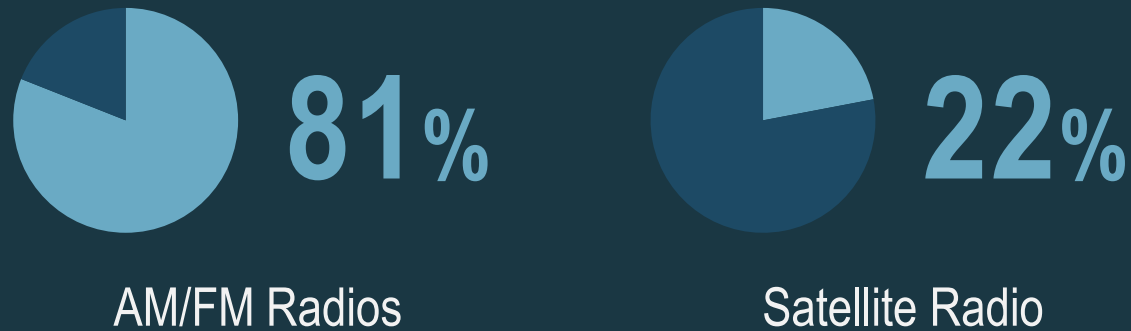




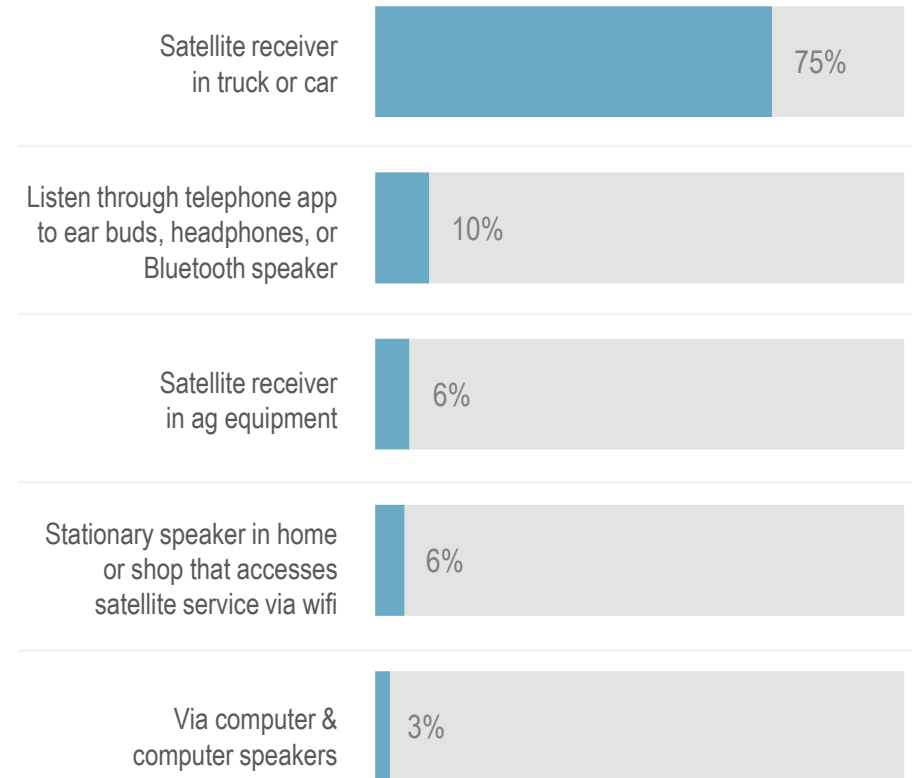
ADDITIONAL DATA

Unlike broadcast radio, satellite radio listenership is limited to passenger vehicles.

Presence of Radio Devices in Ag Equipment (combines, etc.)

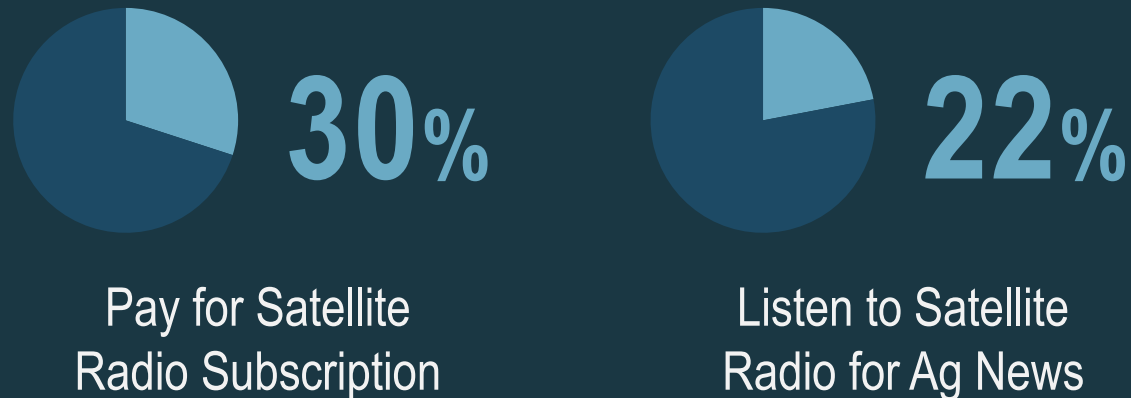


Where Listen to Satellite Radio Most Often



...and the content consumed on satellite radio is not predominantly ag focused.

Satellite Radio Purchase and Listenership



While 30% of listeners interviewed pay for a satellite radio subscription, only 22% use the service to gather ag-related news.

This, along with satellite's limited on-farm presence, suggests that satellite radio is not a major conveyer of ag news.



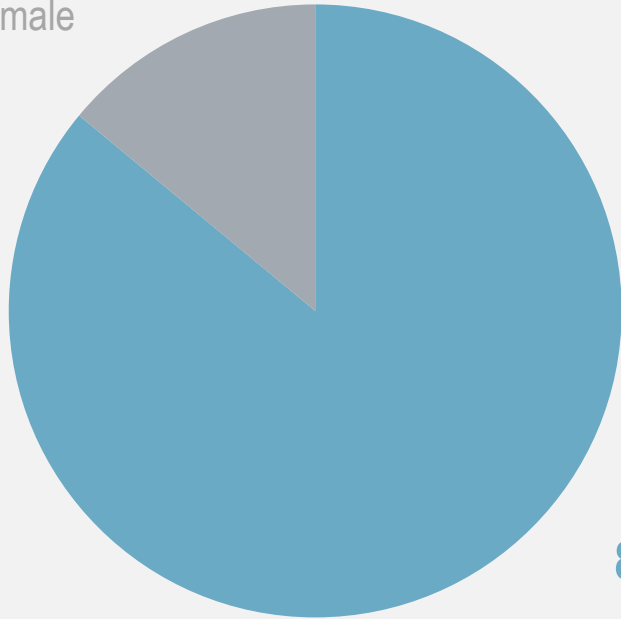


AUDIENCE SAMPLE

Listener Demo Profile

Gender

14%
Female



86%
Male

