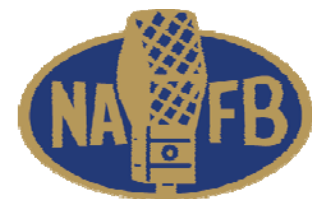




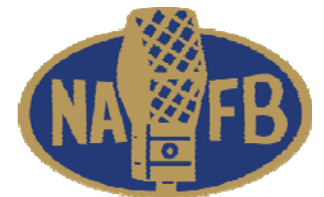
Farm Radio Connects

Research Conducted by
Millennium Research



Listening With A Purpose

- Farmers and ranchers are information seekers
 - Farming is their livelihood and passion
 - Utilize multiple media platforms
- Content is focused on production ag
- Delivers timely news and information
- Local, regional, national news that impacts daily operation decisions
- Personal connection to broadcaster and station
- Knows time of ag programming, and the station call letters



The Audience Is Listening

Wave 1 -3 Research



Methodology


- 300 sample size per quarter, total of 1200 survey completes by end of 2015
- Wave 1 = Feb/March
- Wave 2 = May/June
- Wave 3 = September/October
- Sample size focused within 75 mile radius of station airing content produced by NAFB member
- \$100,000 plus Gross Farm Income (GFI) operations
- Nationwide survey, calls per state based on percentage of state GFI operations, 2012 USDA Census Data

State	\$100K+ Farms	% of US total
Iowa	36,381	9%
Minnesota	24,991	6%
Illinois	24,811	6%
Nebraska	21,467	6%
California	20,558	5%
Texas	17,489	5%
Wisconsin	17,146	4%
Kansas	15,765	4%
Ohio	15,324	4%
Indiana	14,313	4%
South Dakota	13,028	3%
North Dakota	12,556	3%
Missouri	12,415	3%
Pennsylvania	11,814	3%
Michigan	9,396	2%
North Carolina	8,331	2%
Arkansas	7,506	2%
Oklahoma	7,434	2%
Montana	7,341	2%
Georgia	7,307	2%
New York	7,125	2%
Kentucky	6,340	2%
Washington	6,102	2%
Colorado	5,633	1%
Florida	5,224	1%
Idaho	5,096	1%
Alabama	4,852	1%
Mississippi	4,740	1%
Oregon	4,646	1%
Virginia	4,431	1%
Tennessee	4,160	1%
Louisiana	3,288	1%
Wyoming	2,763	1%
Maryland	2,521	1%
South Carolina	2,061	1%
Utah	1,983	1%
New Mexico	1,741	0%
Arizona	1,451	0%
New Jersey	1,123	0%
Vermont	1,109	0%
Delaware	1,021	0%
Nevada	875	0%
West Virginia	862	0%
Maine	778	0%
Massachusetts	758	0%
Hawaii	506	0%
Connecticut	458	0%
New Hampshire	264	0%
Rhode Island	108	0%
Alaska	87	0%



Farm Radio Listenership Wave Comparison

Consistently, from season to season, farm radio is a leading source of farm news, information, markets and weather.

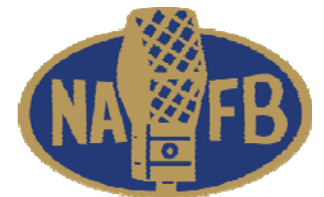
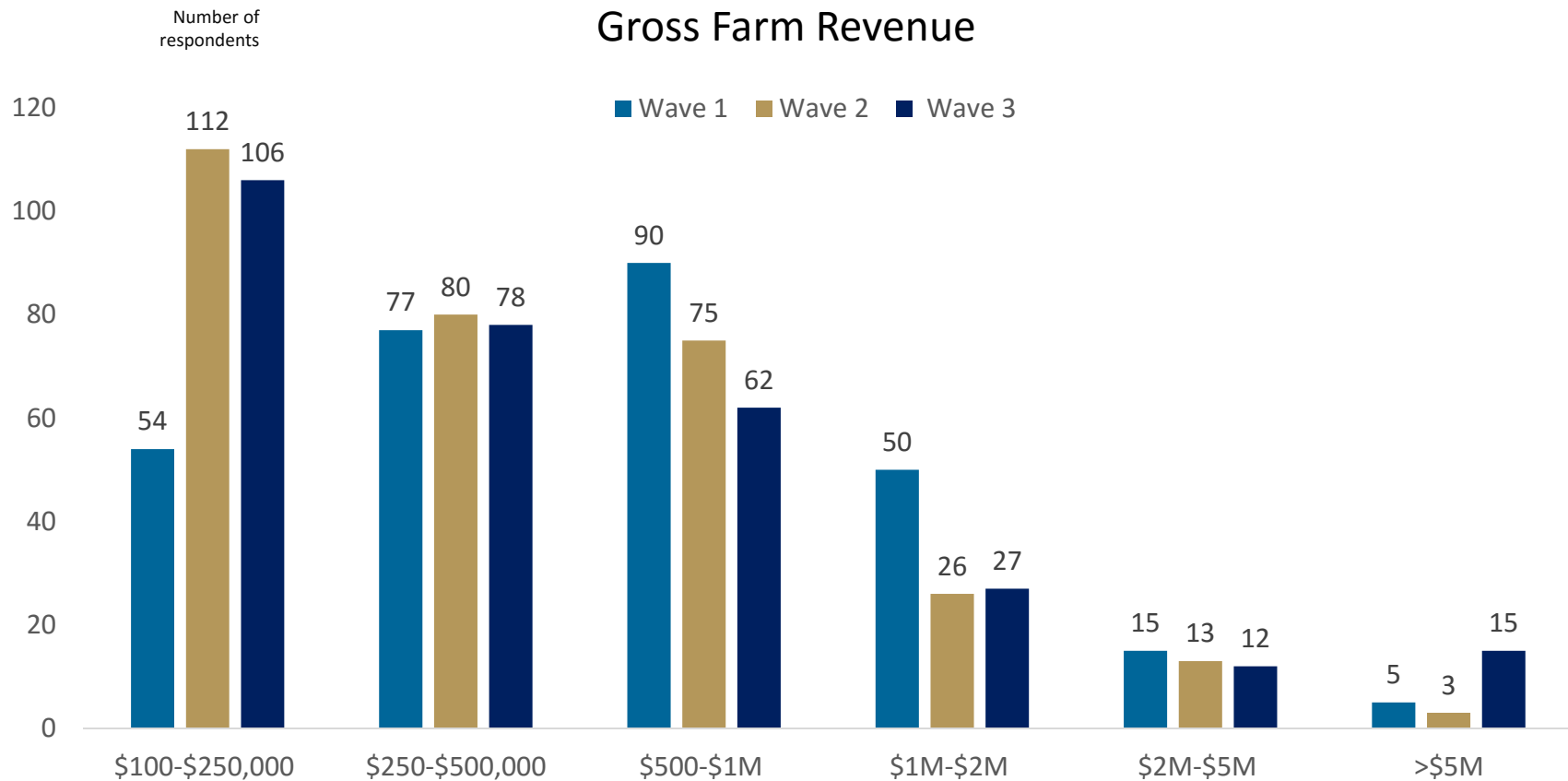


We sometimes forget how much time farmers spend waiting in their vehicle. Here is a man listening to farm radio while he waits in line at the elevator. Notice the number of trucks behind him, and he's not at the front of the line yet.



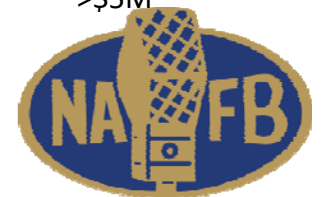
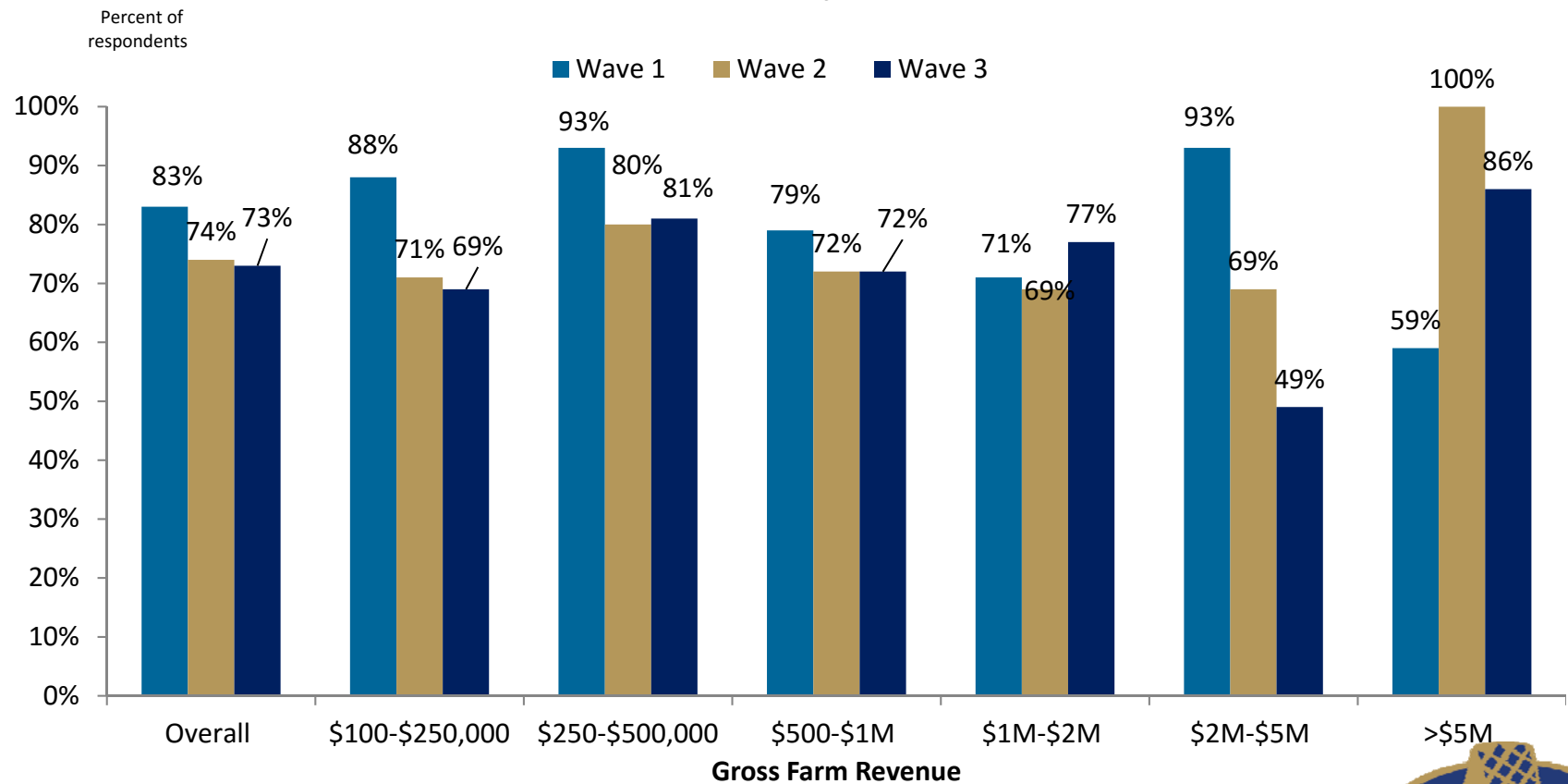
Regardless of where they are or what they are doing, farmers tune in for the weather and the markets.

Gross Farm Revenue By Data Collection Wave



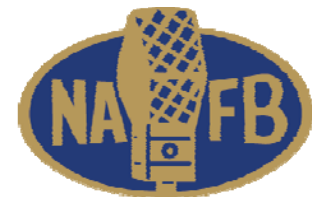
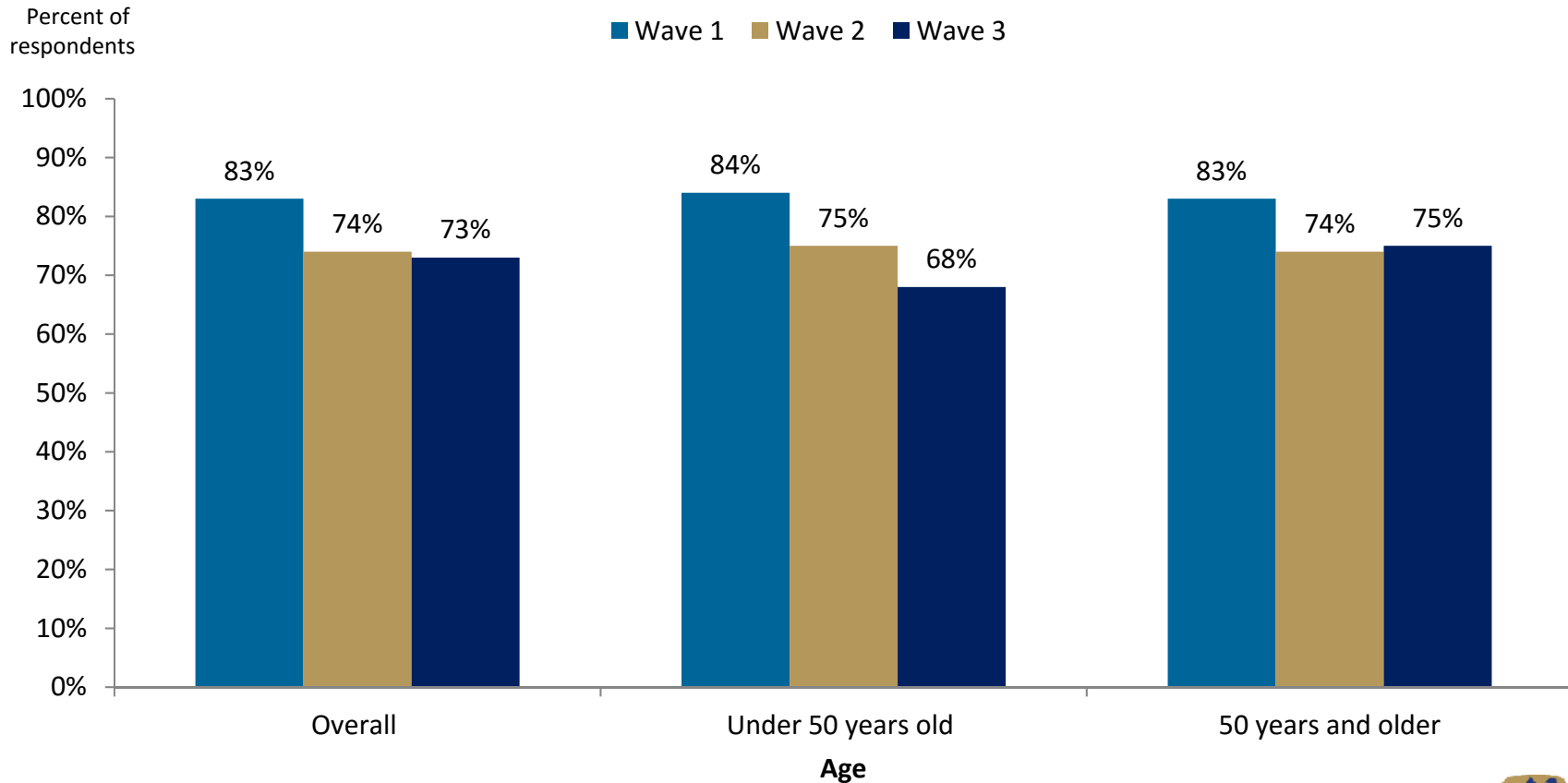
Farm Radio Is On

Do you listen to farm news, weather, markets and ag information on the radio during this time of year?



Consistent Listening Habits Season To Season

Do you listen to farm news, weather, markets and ag information during this time of year?

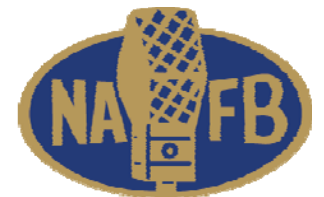
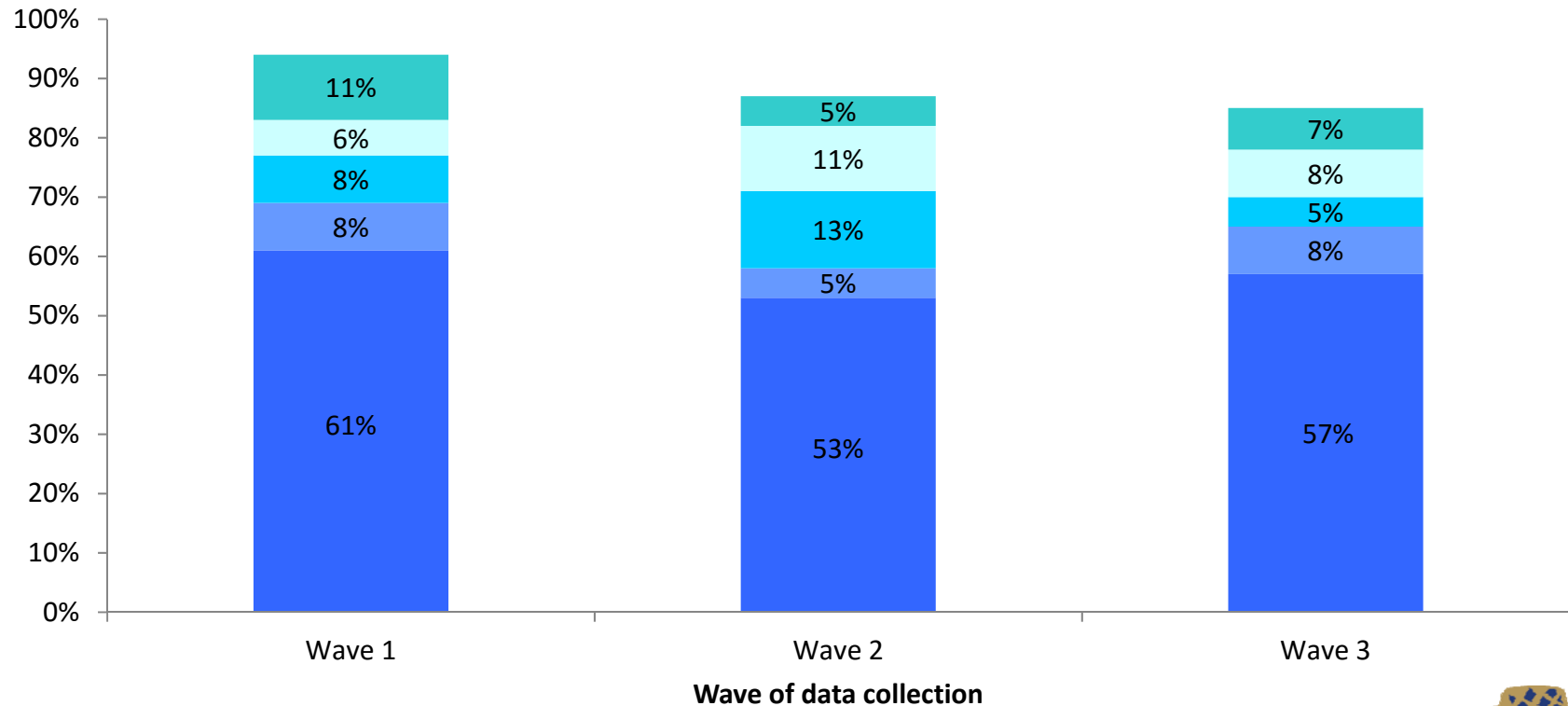


Daily Listenership Is Consistent From Season To Season

Percent of respondents

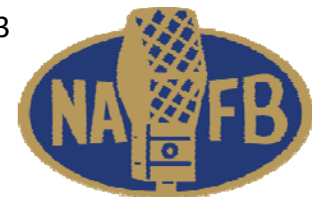
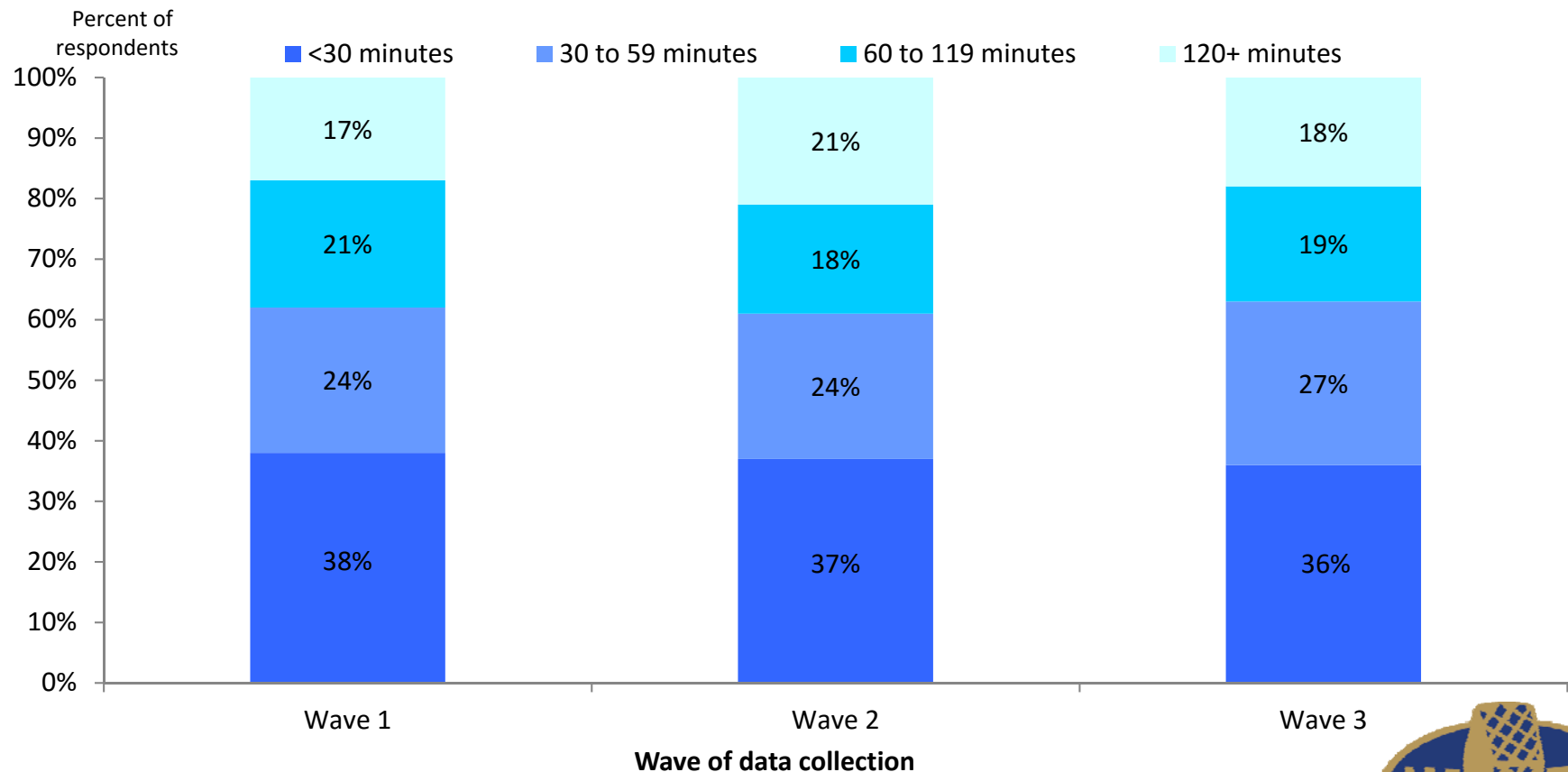
How many days of the week (Monday-Friday) do you listen to farm radio?

■ Five days ■ Four days ■ Three days ■ Two days ■ One day

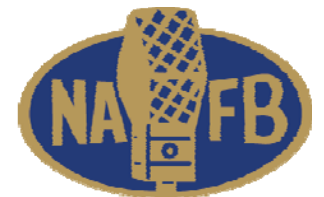
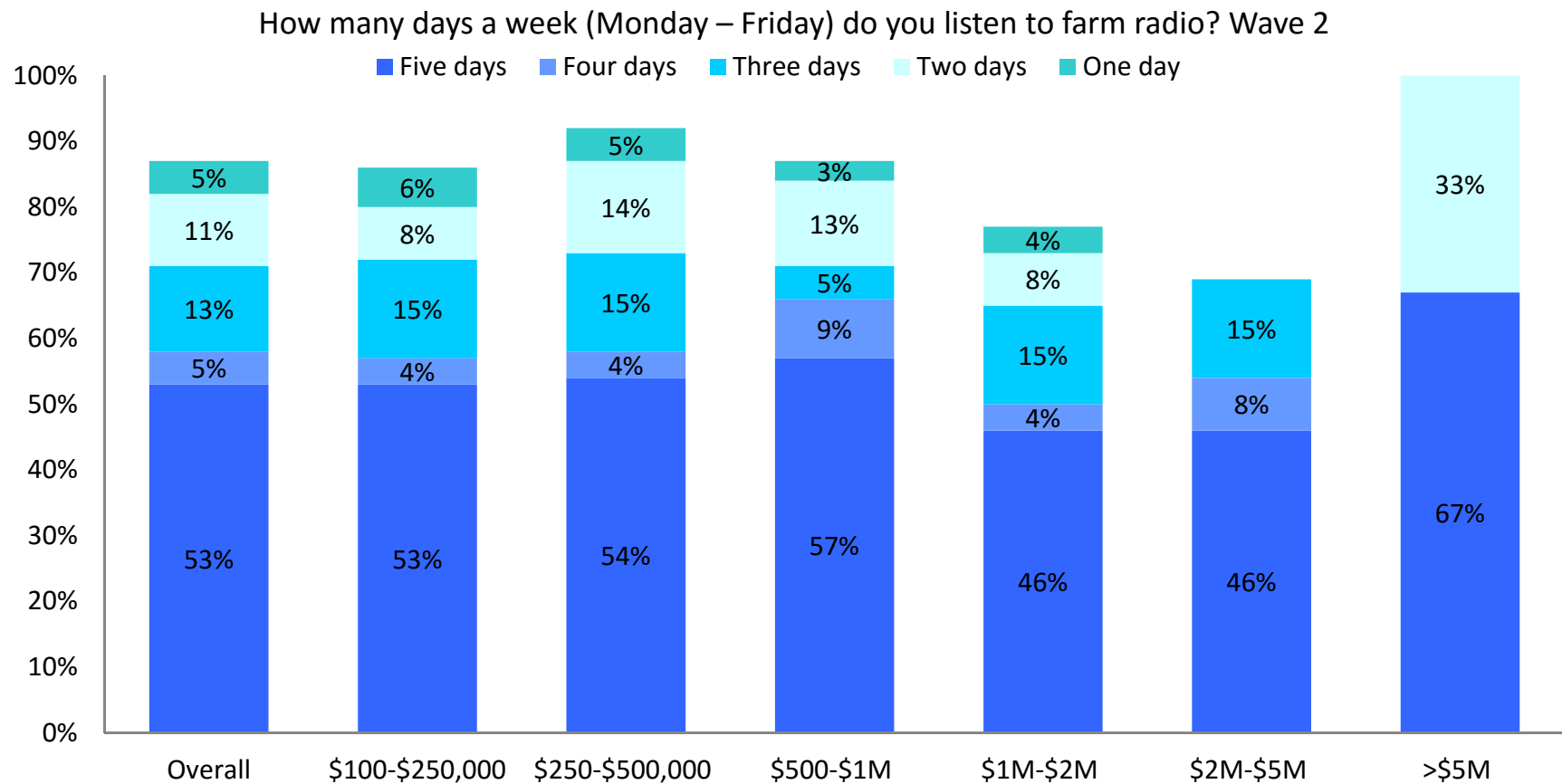


Length Of Farm Radio Listenership Is Consistent From Season To Season

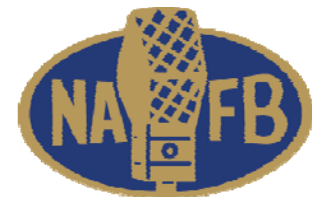
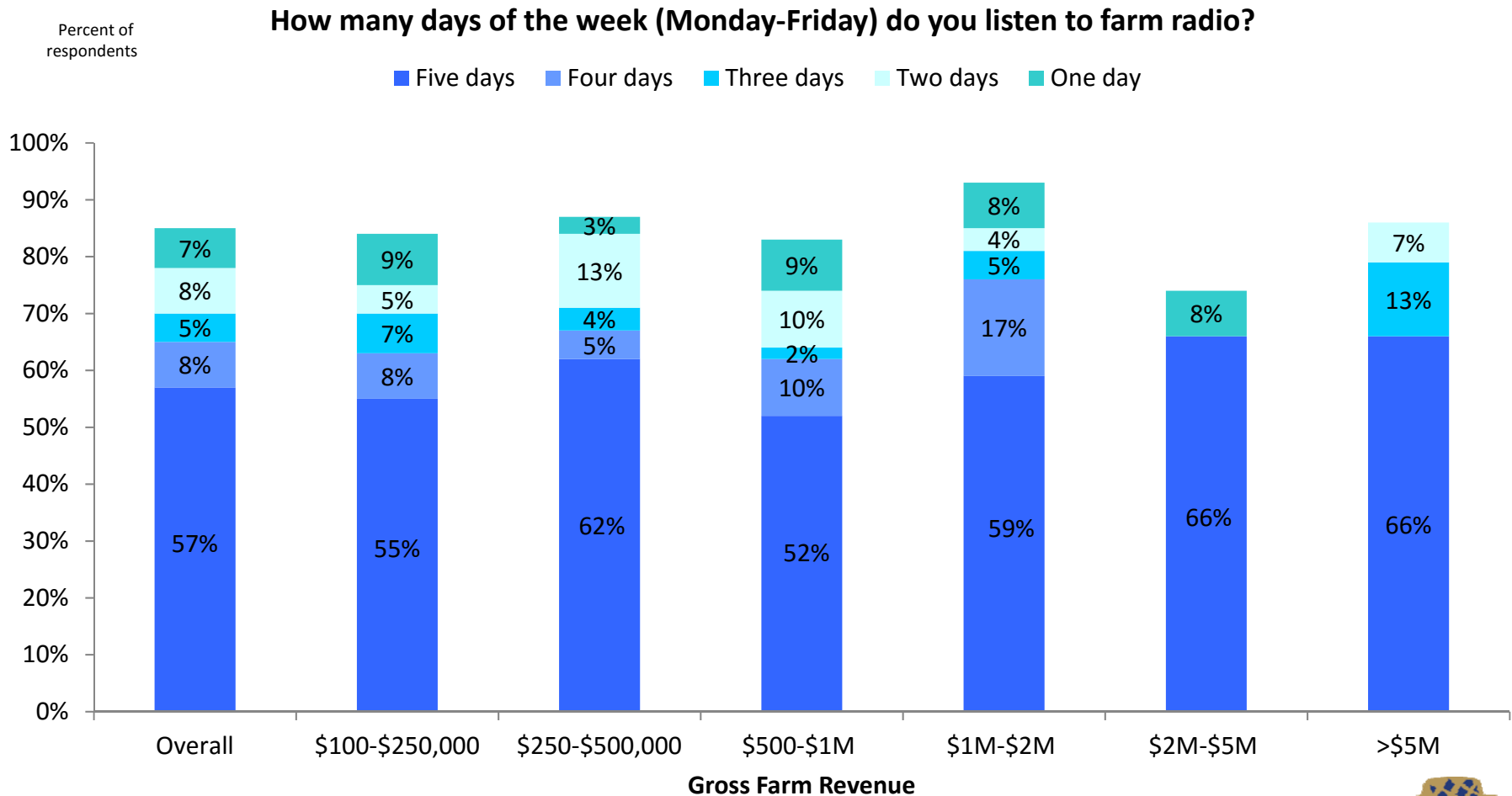
On a typical weekday during this time of year, how many minutes do you spend listening to farm radio news, weather, markets and information?



Farmers Are Active Listeners Wave 2

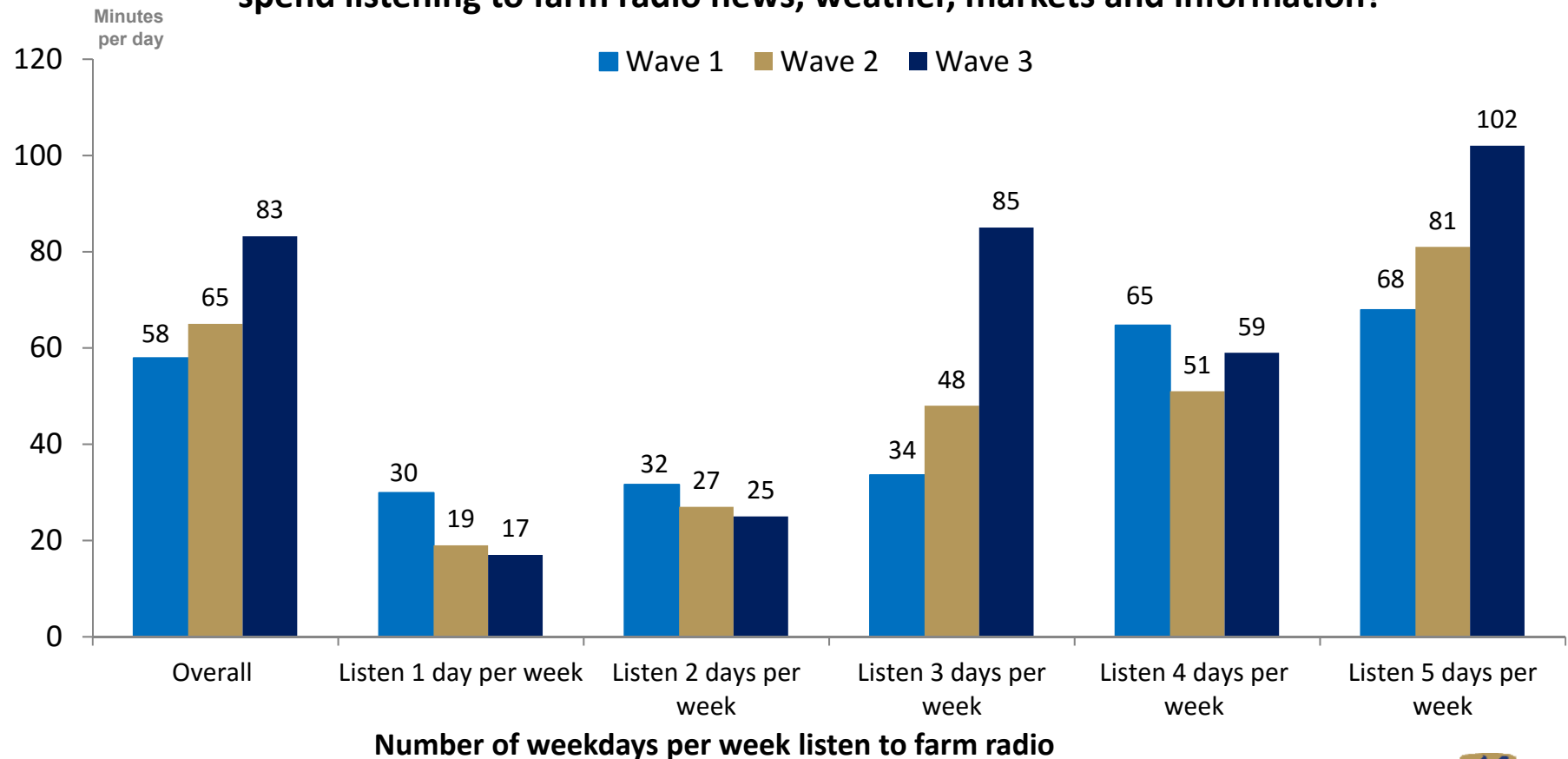


Farmers Are Active Listeners Wave 3



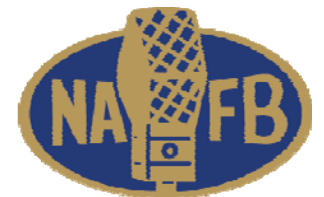
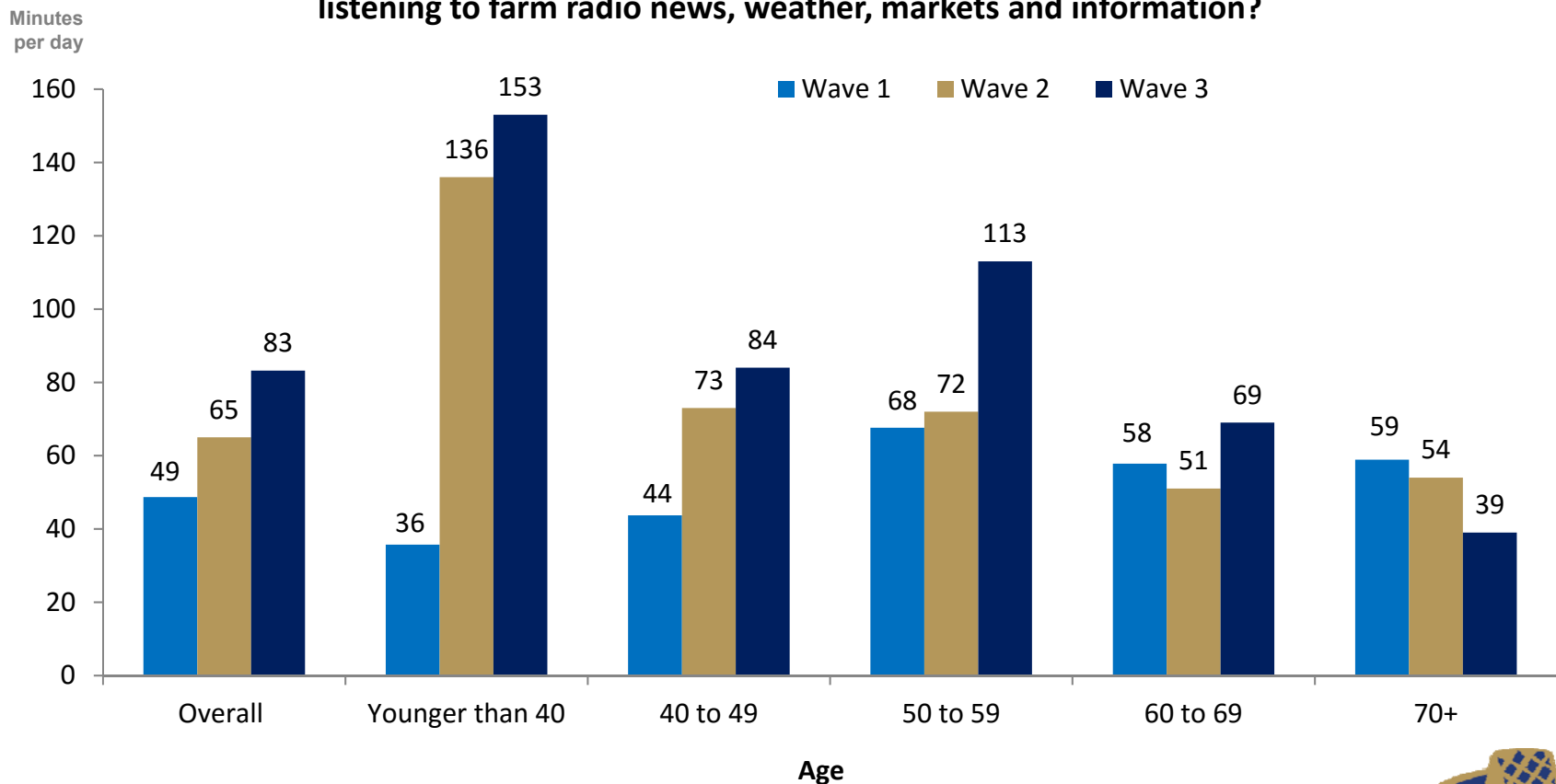
Frequent Listeners, Listen Longer

On a typical weekday during this time of year, how many minutes do you spend listening to farm radio news, weather, markets and information?



Younger Farmers Listen More Every Day Than Older Farmers

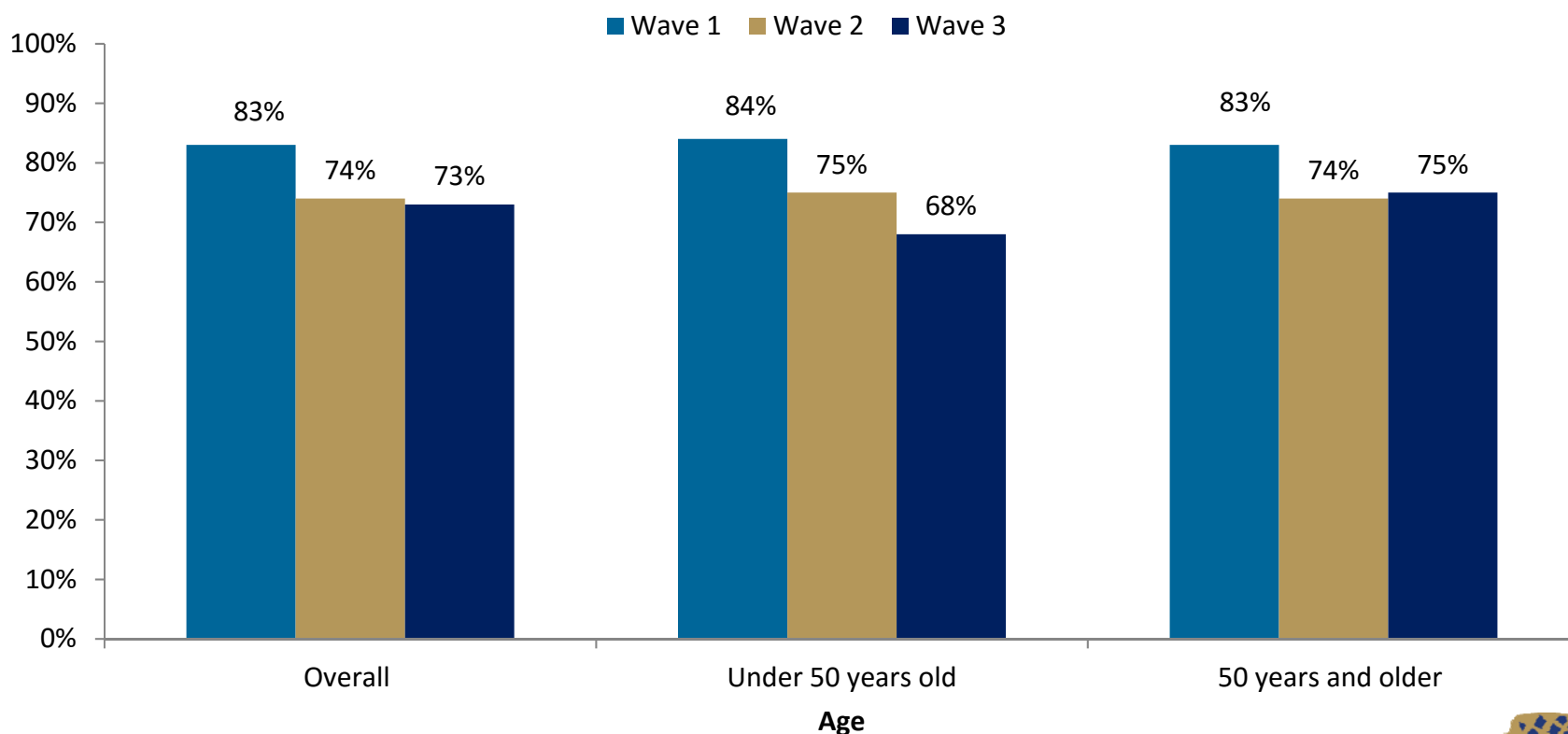
On a typical weekday during this time of year, how many minutes do you spend listening to farm radio news, weather, markets and information?



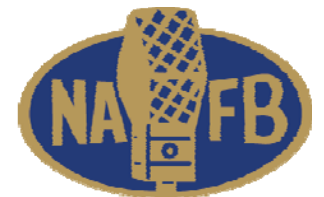
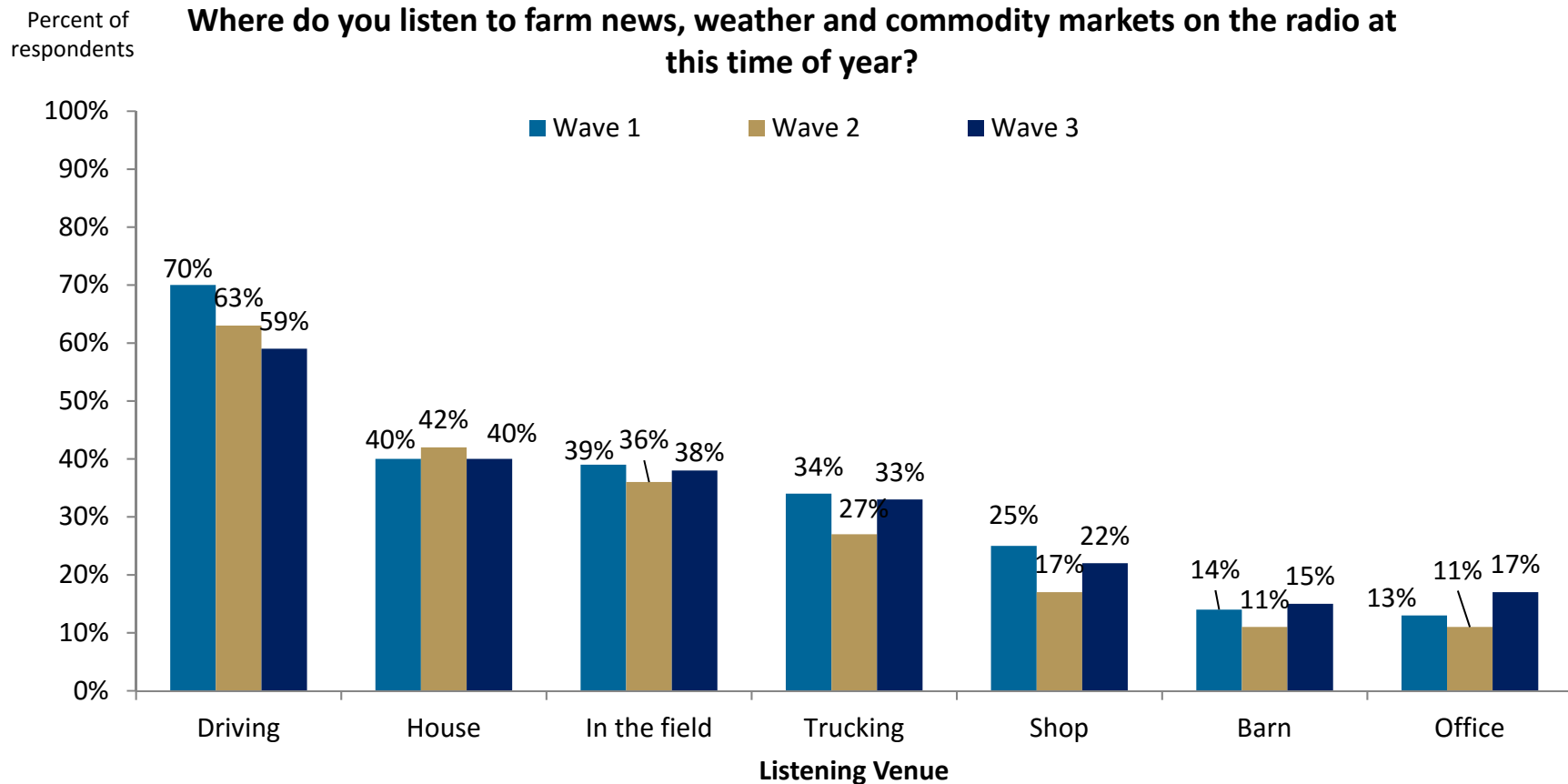
Age Does Not Affect The Percentage Of People Listening To Farm Radio

Percent of respondents

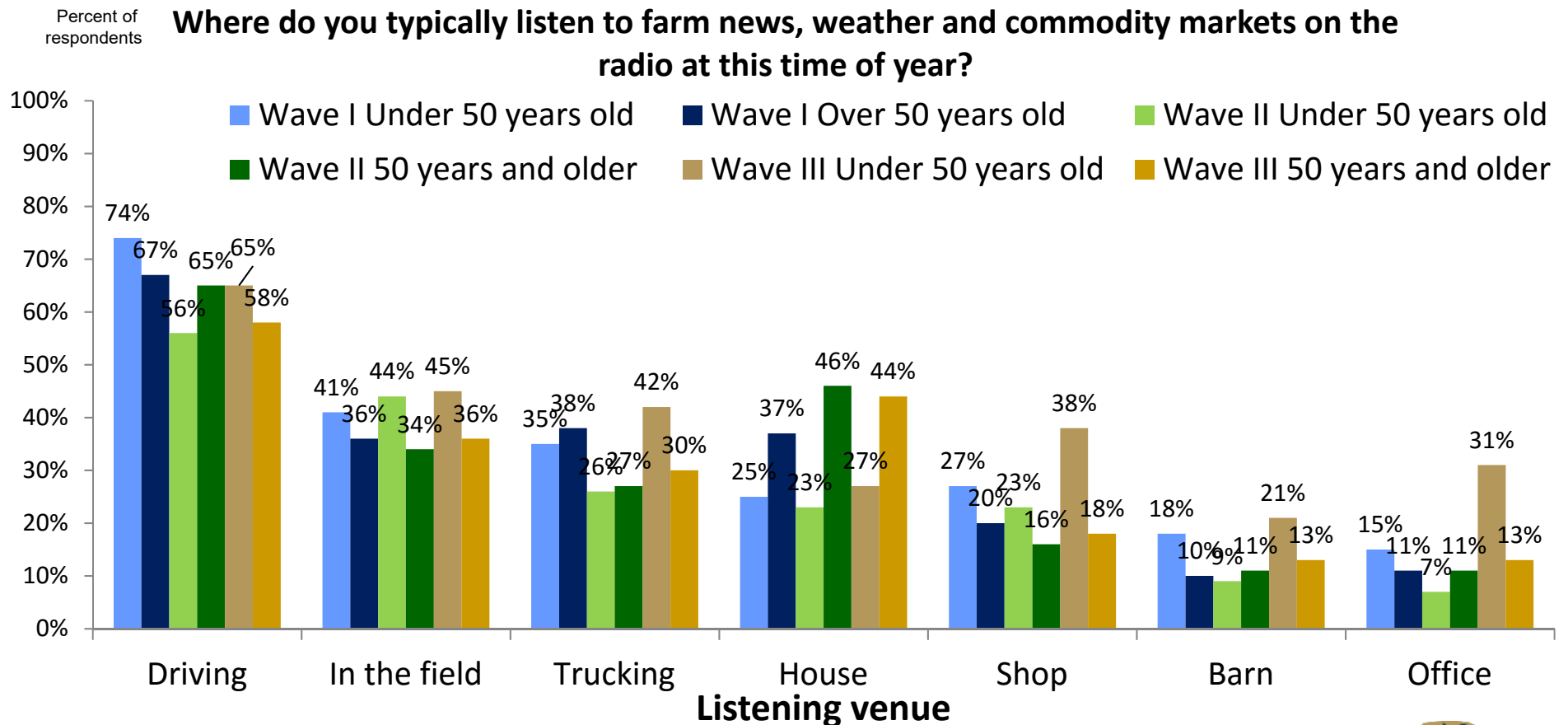
Do you listen to farm news, weather, markets and ag information during this time of year?



Respondents Listen To Farm Radio In Many Venues



In The Fall, Young Farmers Are Significantly More Likely Than Older Farmers To listen In The Shop, And Farm Office





Only me in my car on the way to work. I listen to a daily ag news program each day on my 40 minute commute to work. If I'm home or farming, I try to catch the program in the kitchen of our house with my wife.



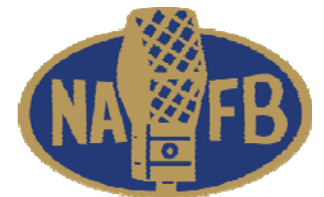
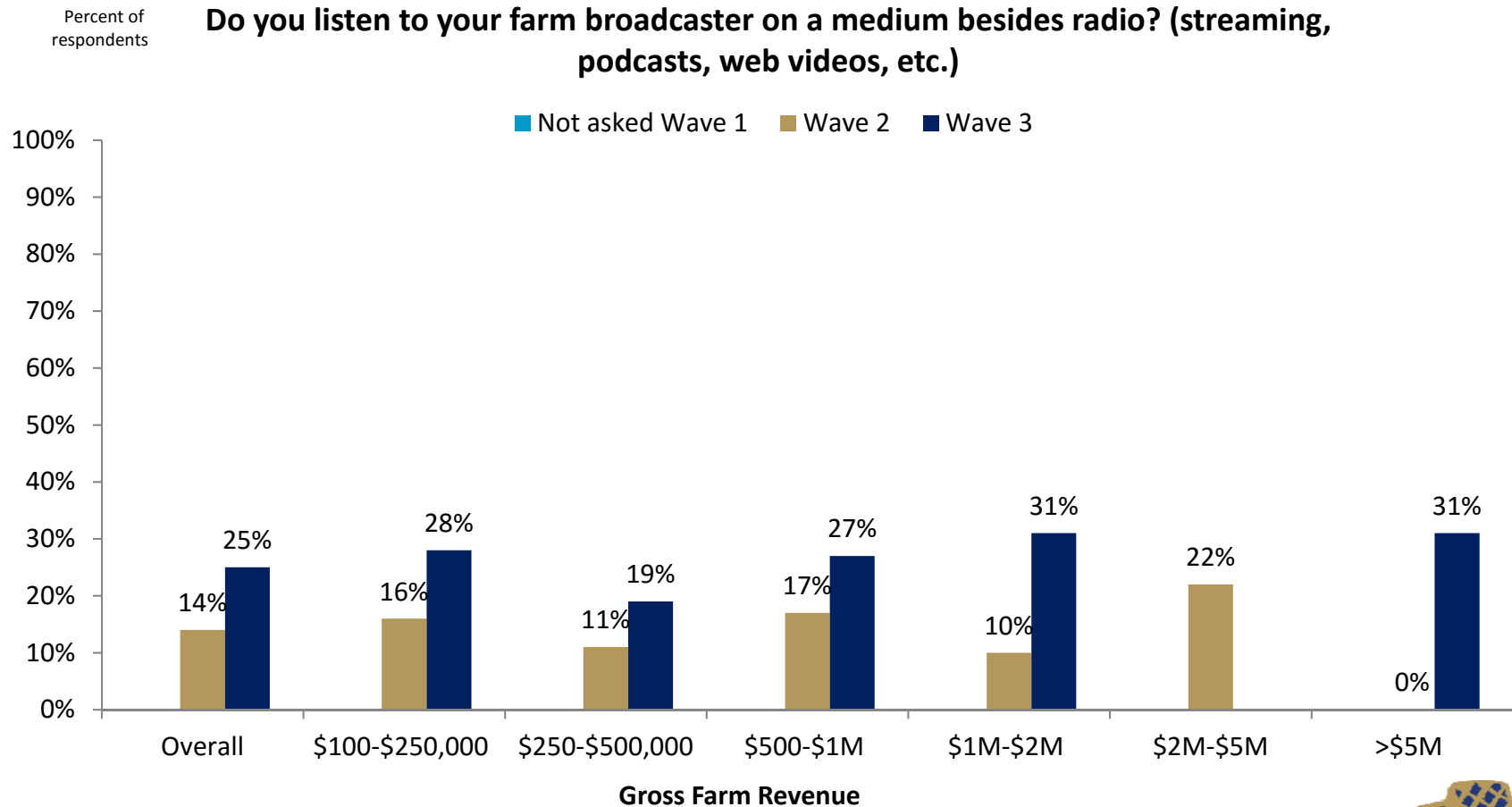
No one. My husband is working on the farm during the day when I am in the car.



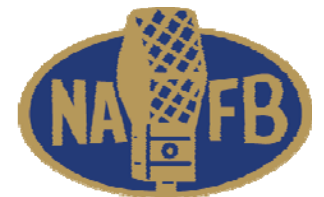
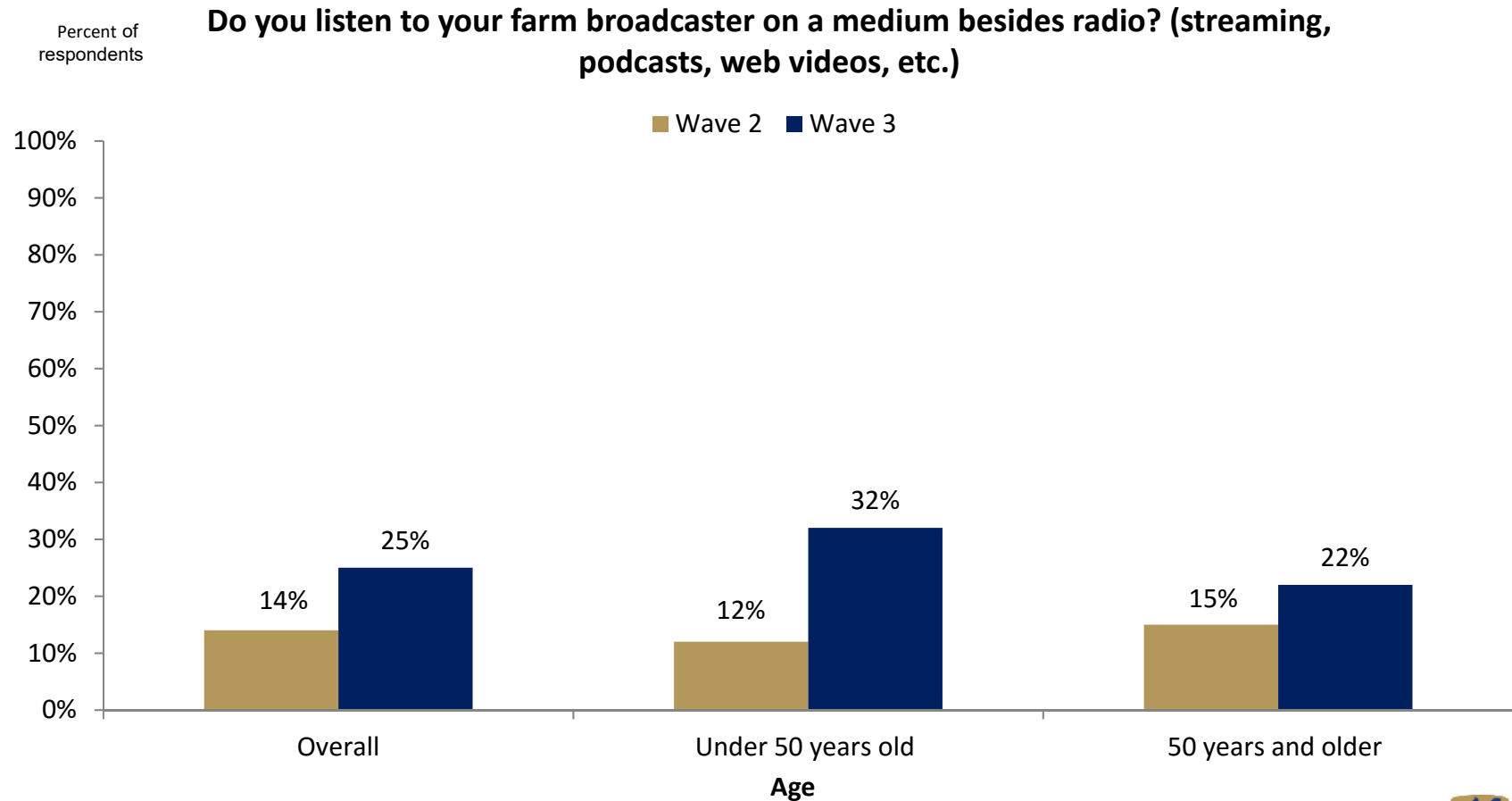
My husband, the brains behind our farming operation.



Farm Broadcasters Deliver Content For How Users Consume Media



Farm Broadcasters Continue To Connect with Younger Producers





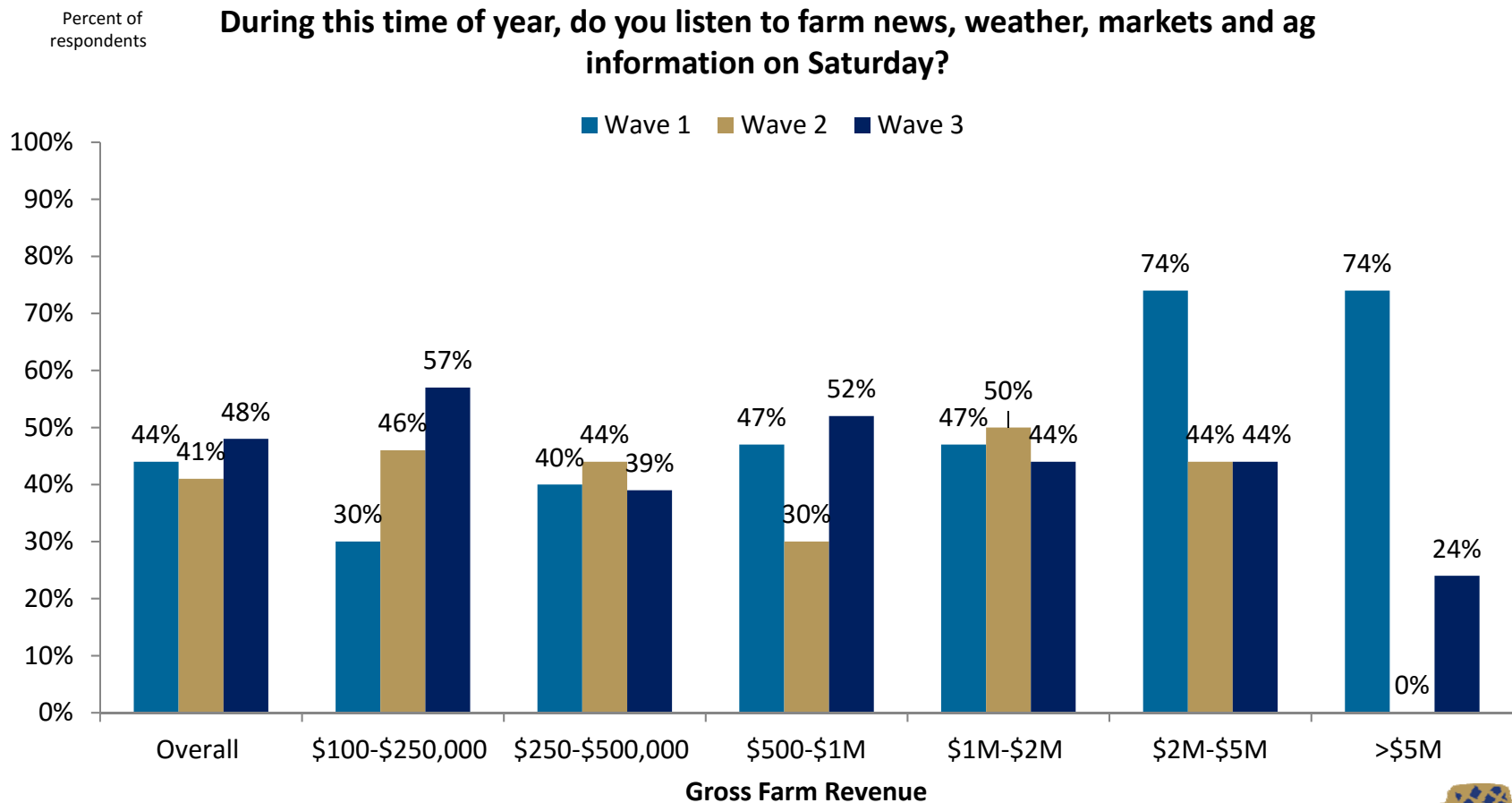
Farm Radio Listening Behavior

Farmers and farm partners can do so much while listening to farm radio. In the fall, many are harvesting, some are handling cattle, and some are driving to a cross country meet.

Radio goes where they go.



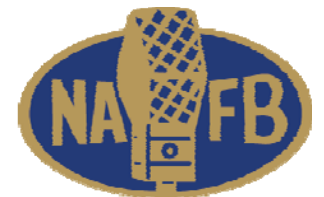
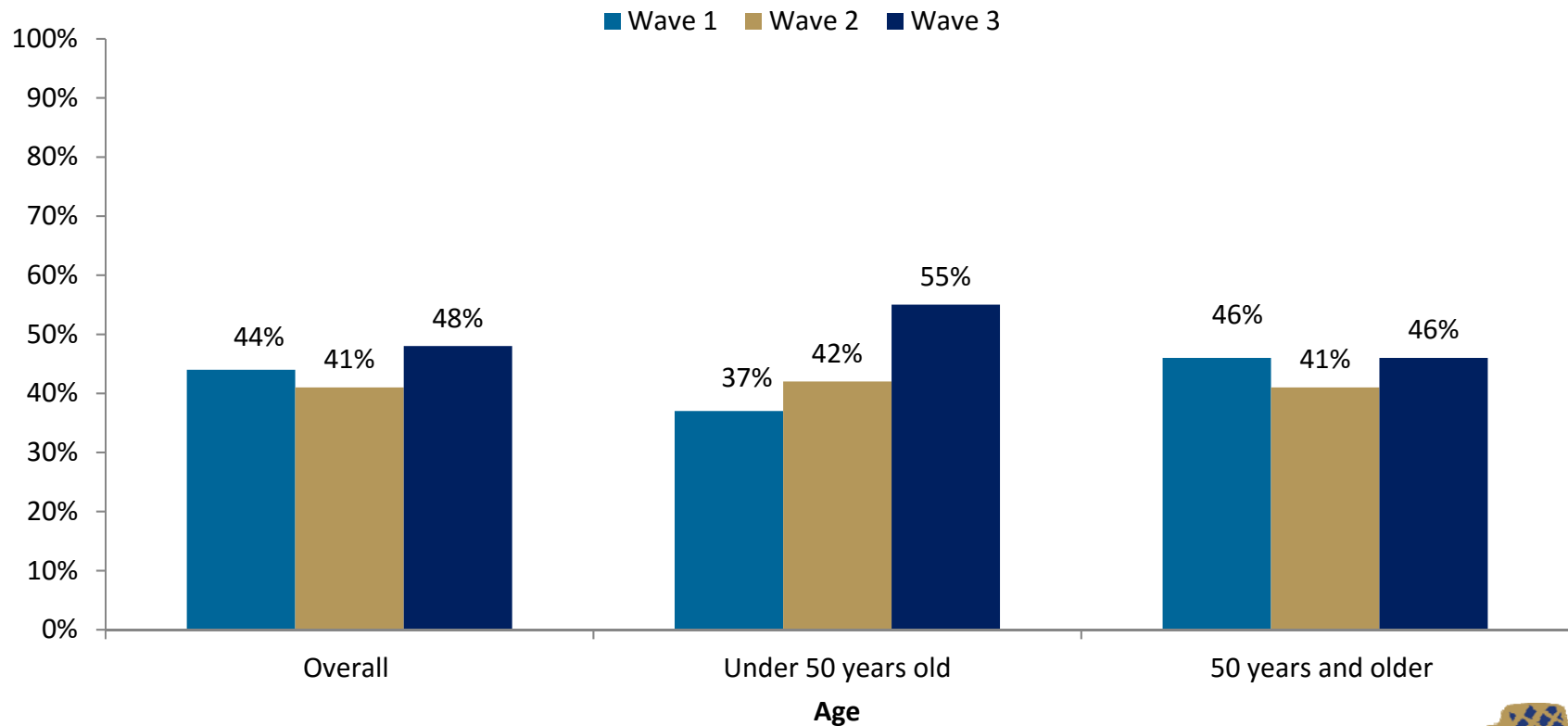
Saturday Listenership is Consistent



Saturday Listenership Is Strong

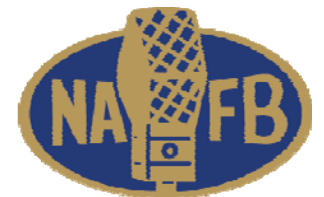
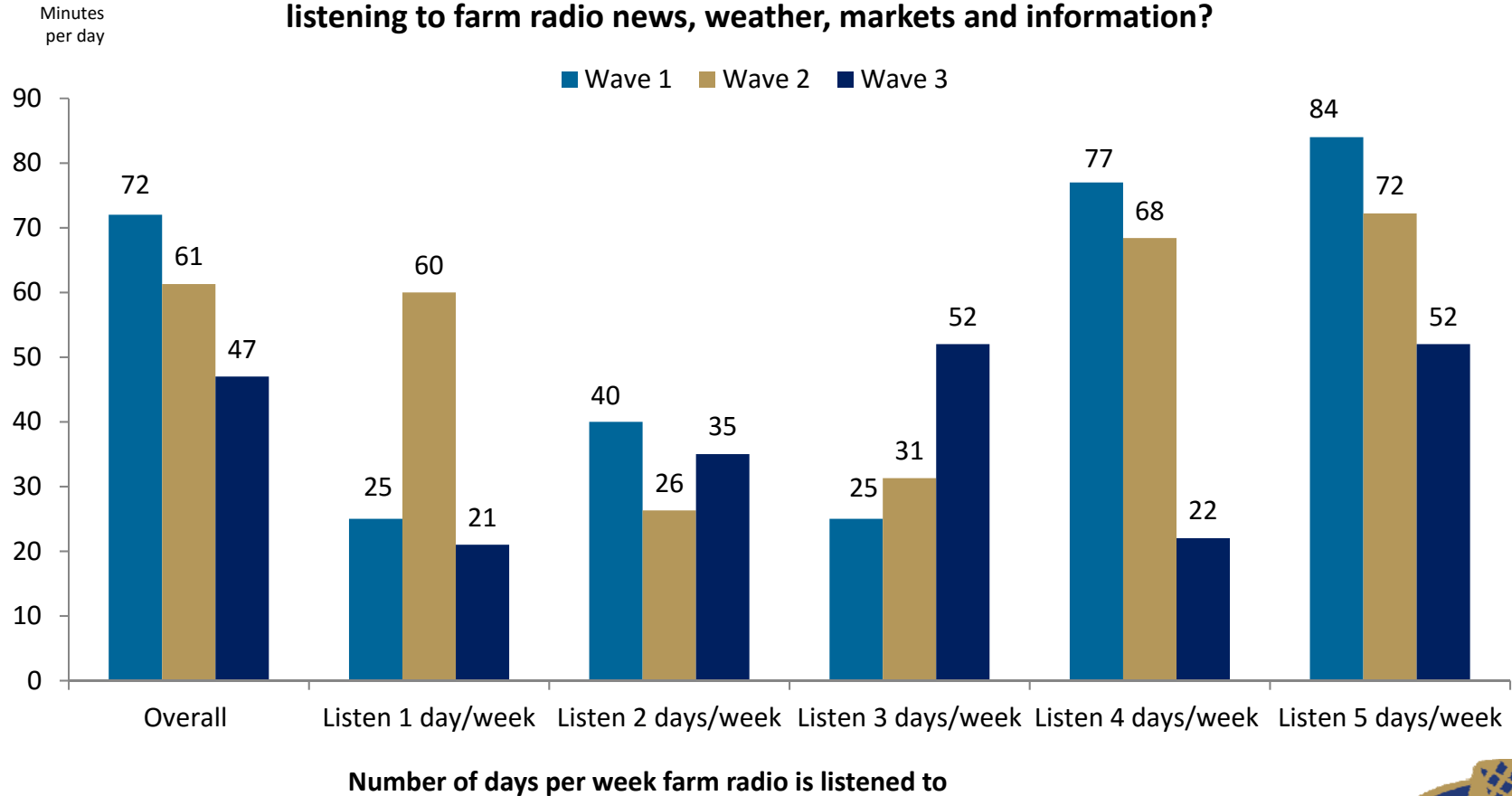
Percent of
respondents

During this time of year, do you listen to farm news, weather, markets and ag information on Saturday?

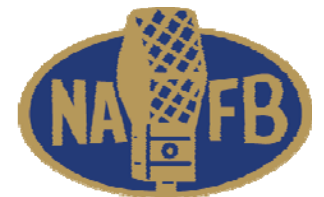
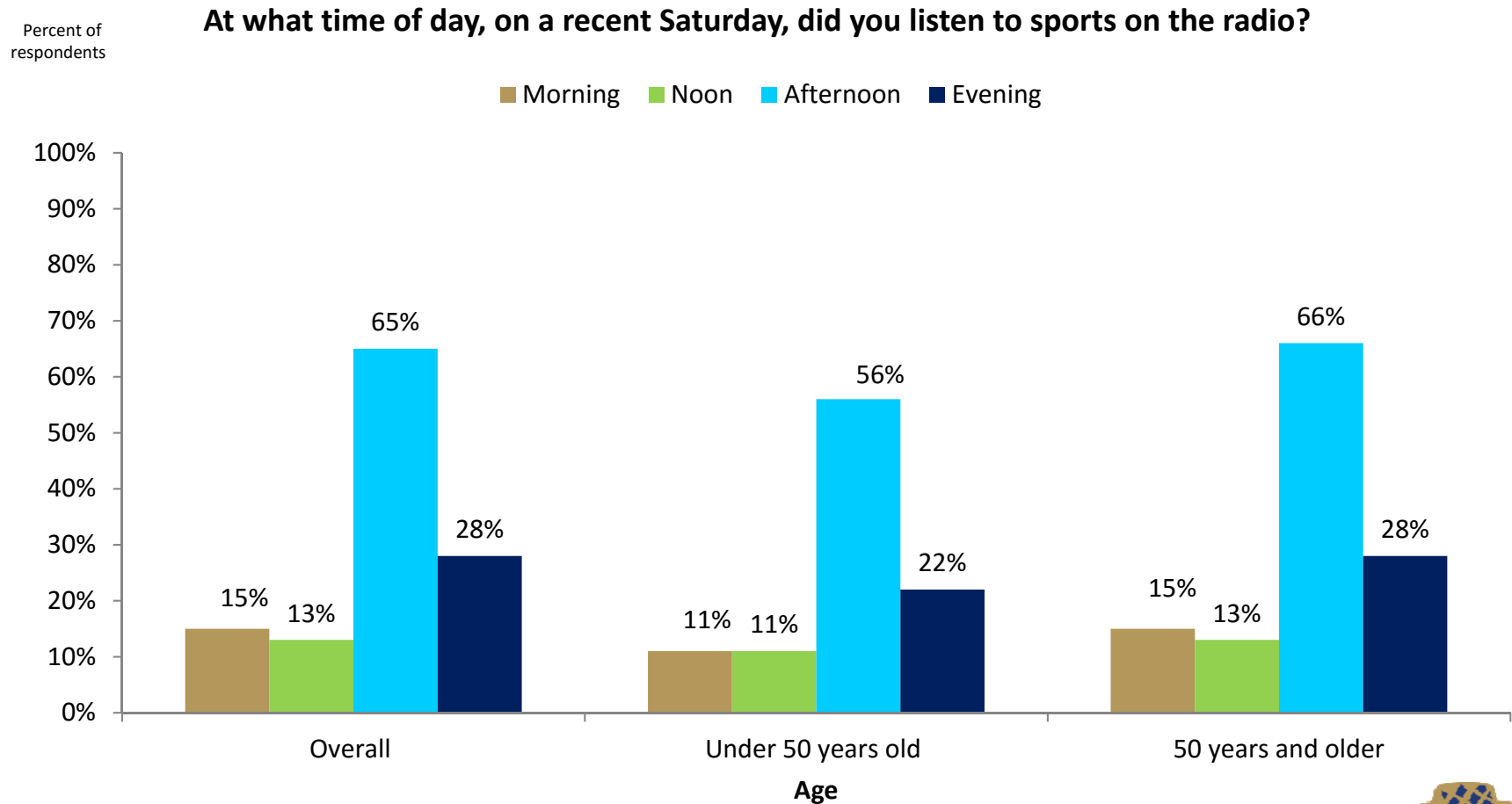


Frequent Listeners Listen On Saturday

On a typical Saturday during this time of year, how many minutes do you spend listening to farm radio news, weather, markets and information?



Farmers and Ranchers Listen to Sports After Farm Broadcasting Airs Wave 3

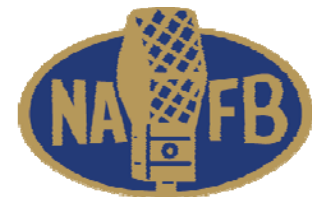
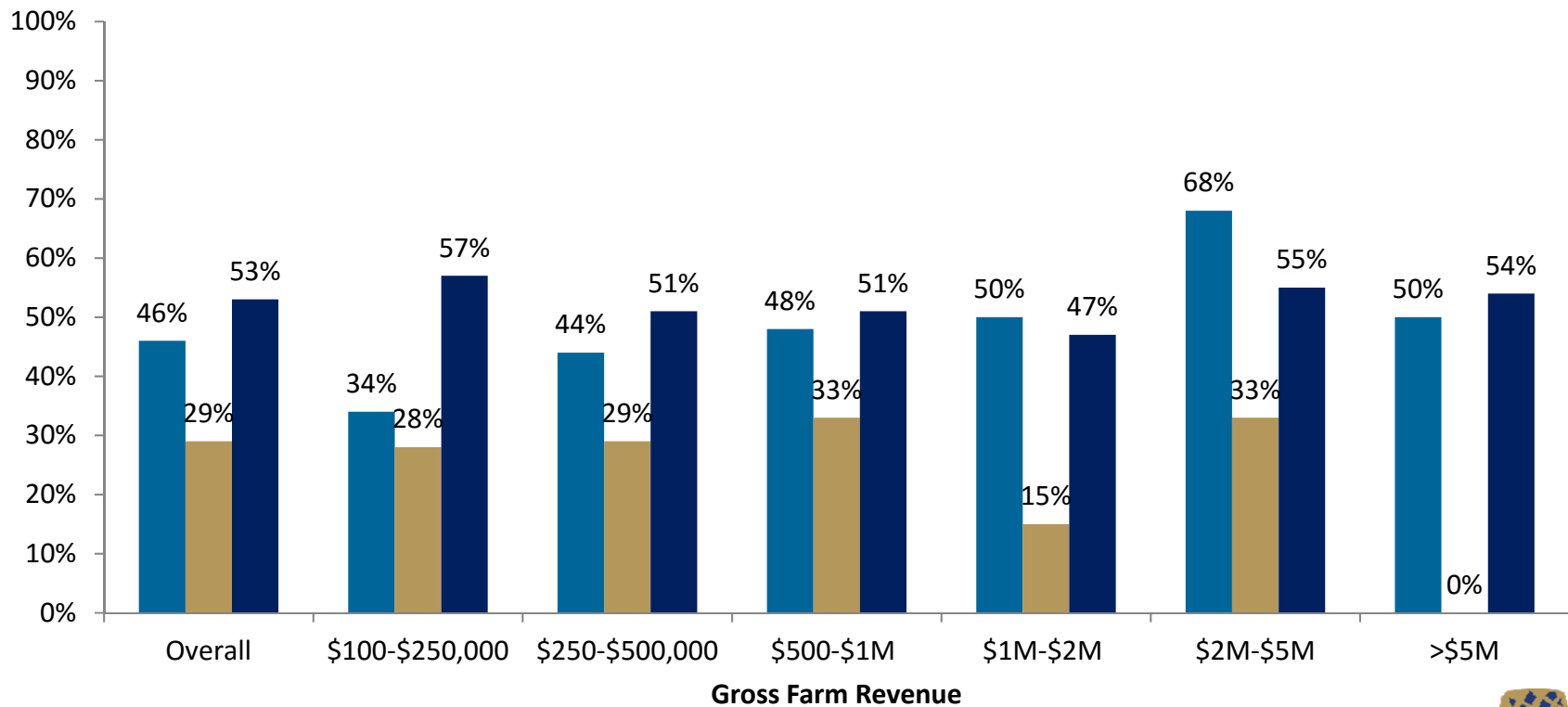


Saturday Sports Listening By Waves

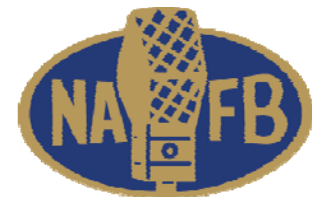
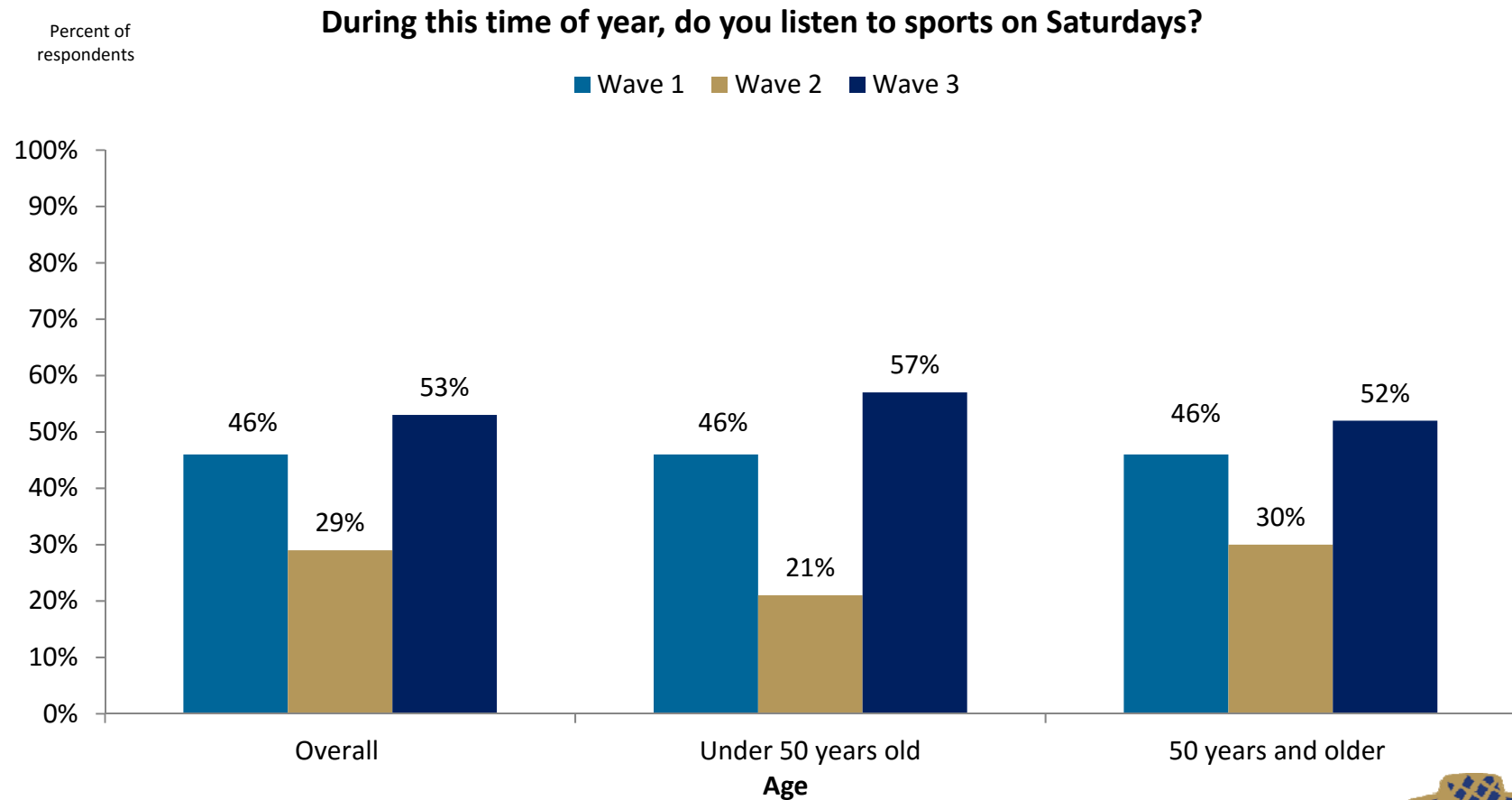
Percent of
respondents

During this time of year, do you listen sports on the radio on Saturday?

■ Wave 1 ■ Wave 2 ■ Wave 3

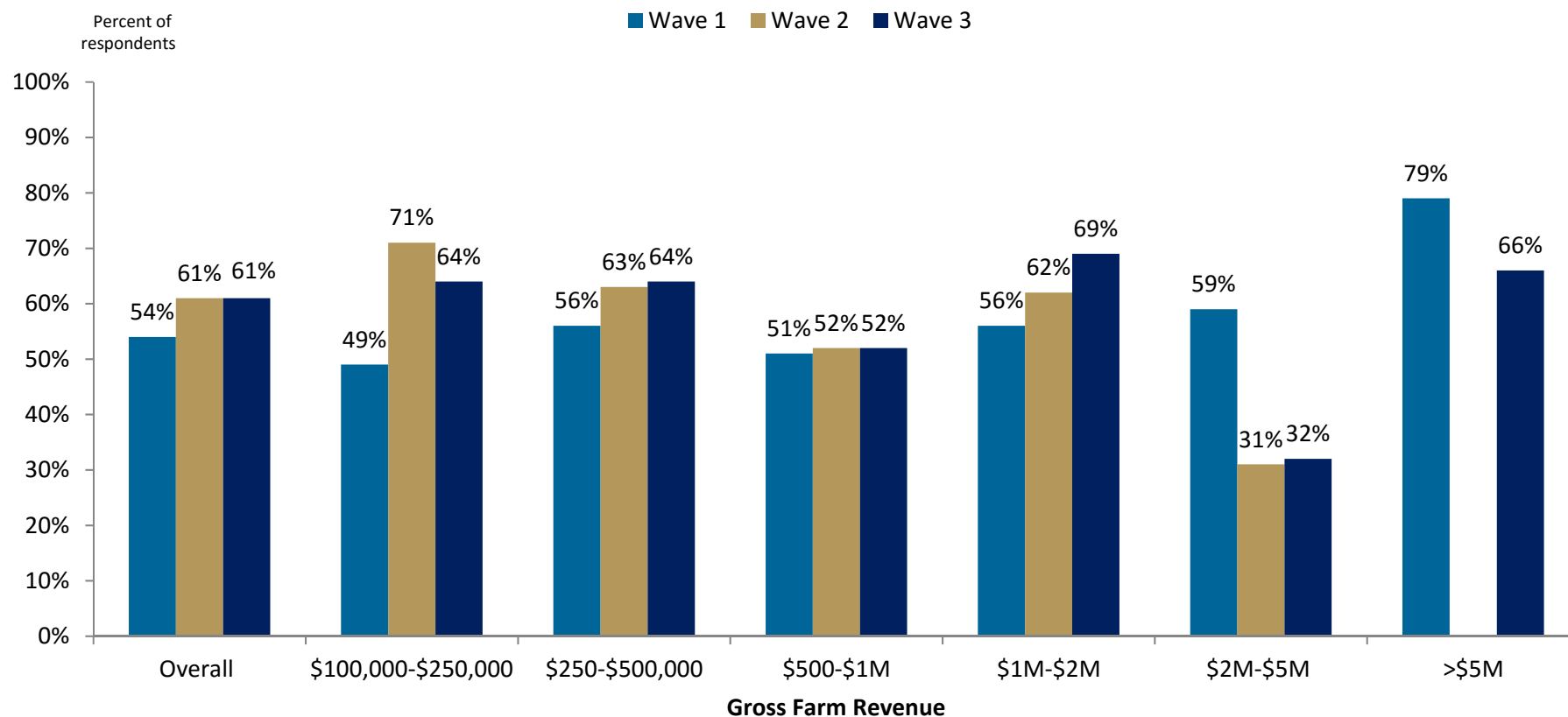


Saturday Sports Listenership Is Popular Among Both Young And Older Farmers

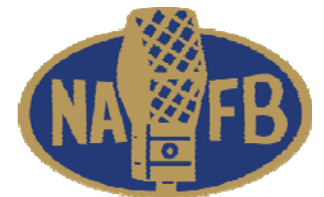
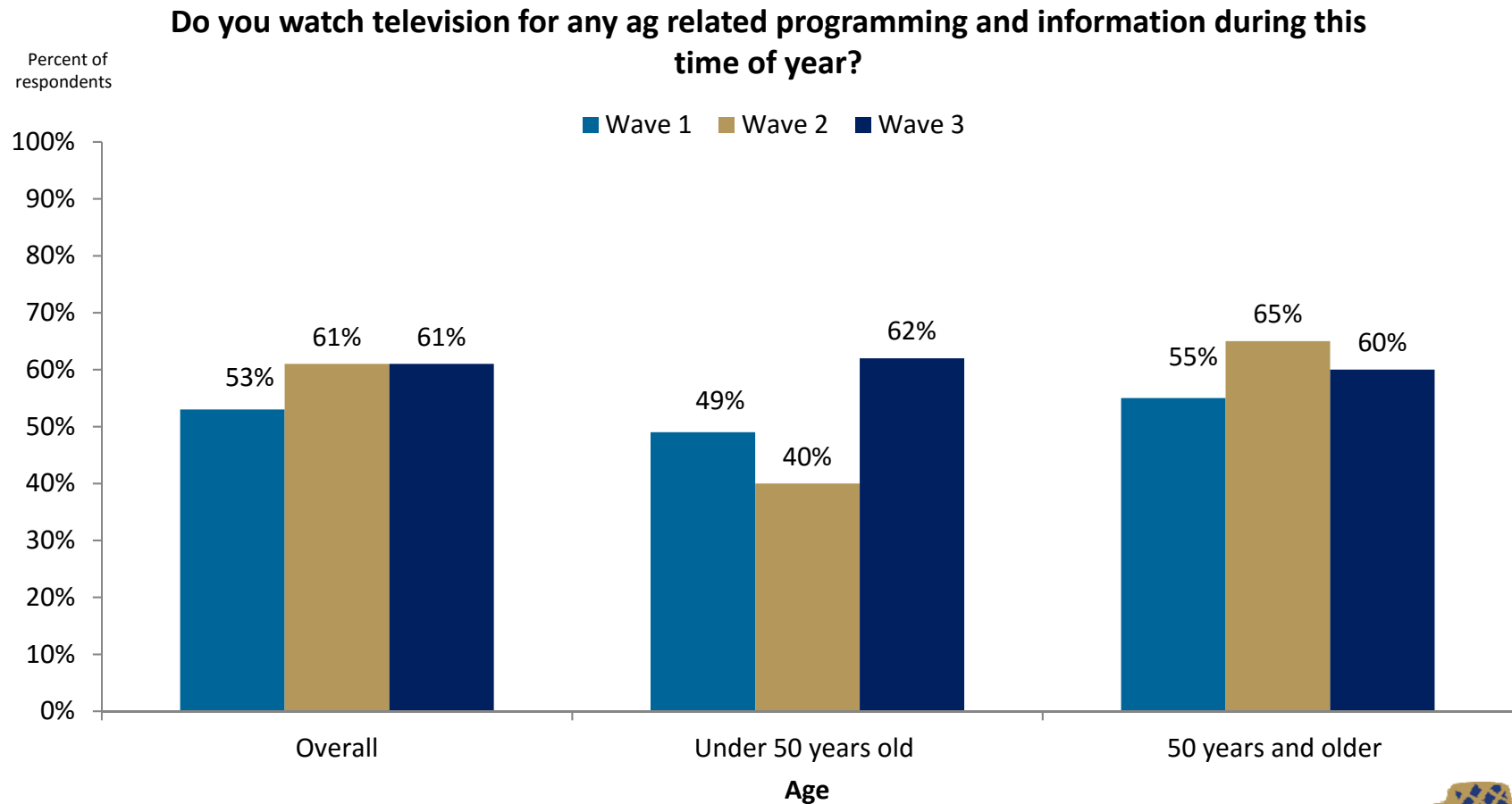


TV Ag Programming

Do you watch television for any ag related programming and information during this time of year?

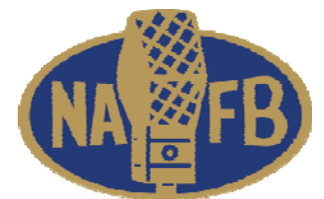


Farmers Of All Ages Watch Ag Television



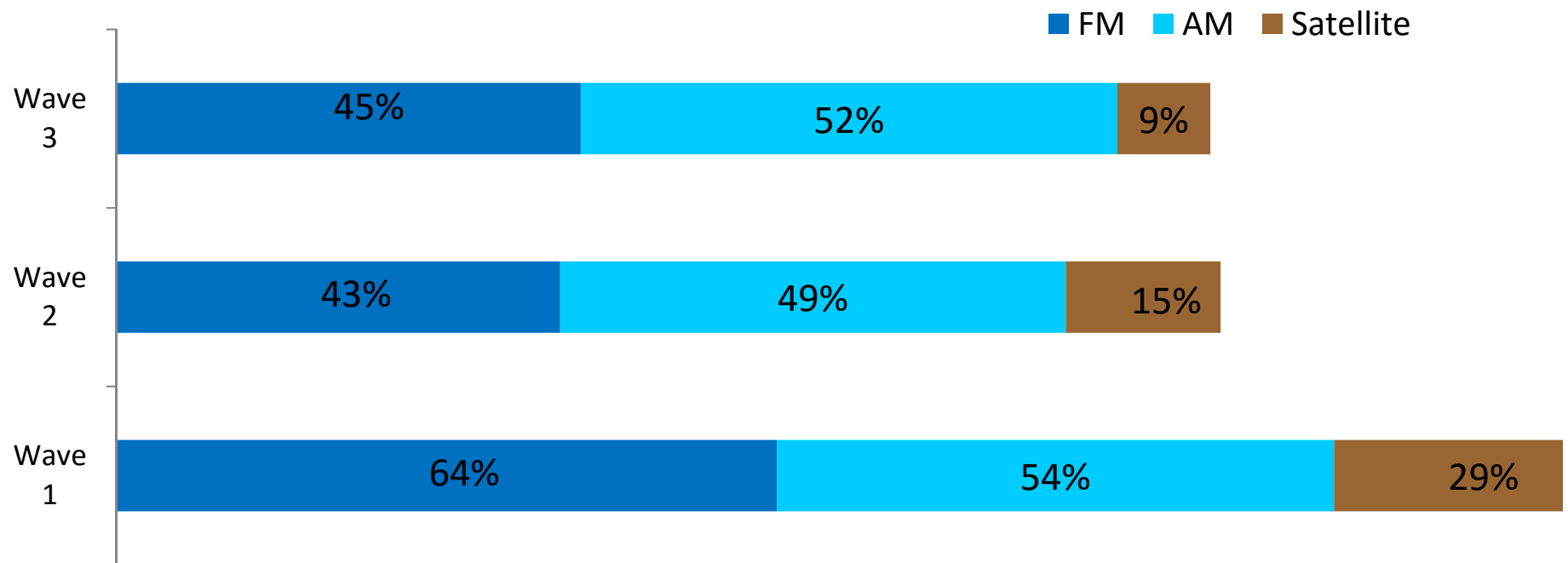


Radio Band Listenership



More Listeners Listen To Farm Radio On Multiple Bands

During this time of year, which radio bands do you listen to farm news, weather, markets and other agricultural information? Multiple Answers Accepted.

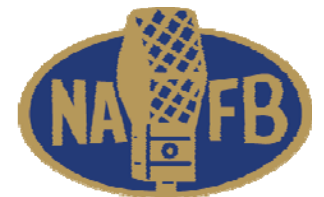
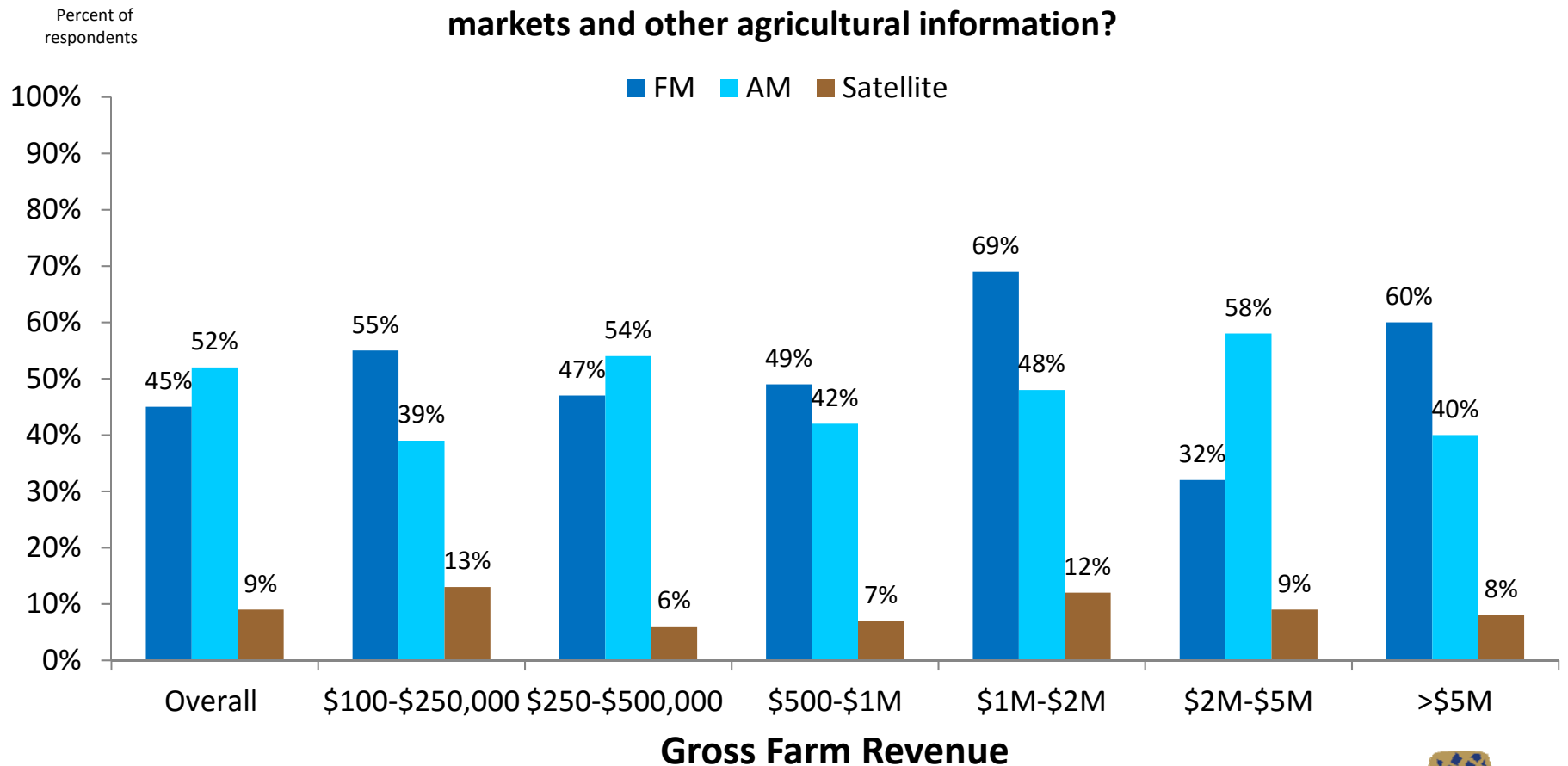


N=301



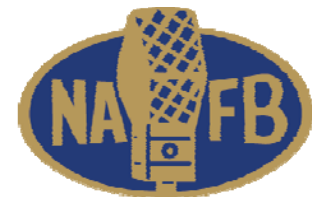
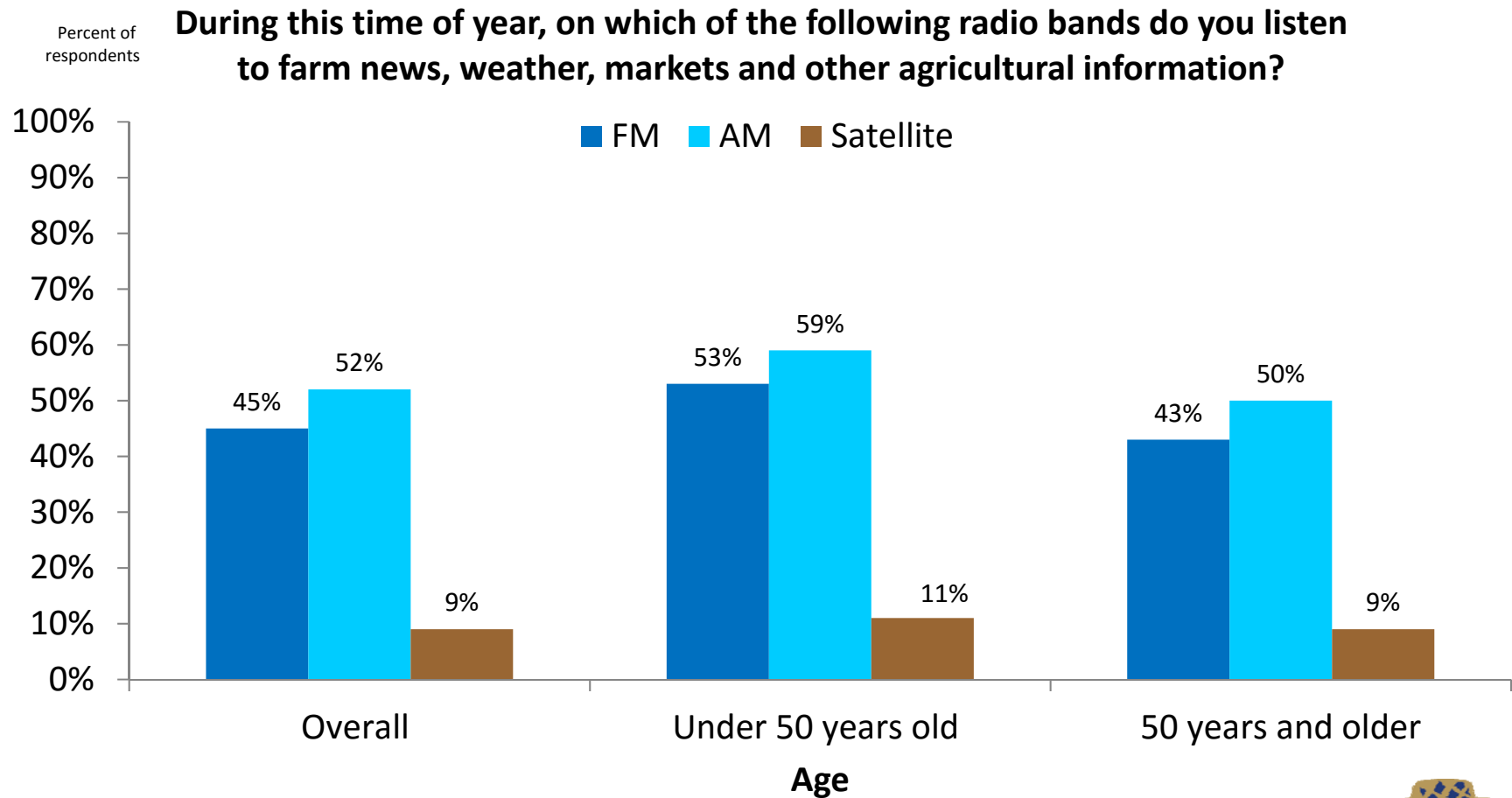
How Farmers and Ranchers Listen Wave 3

During this time of year, which radio bands do you listen to farm news, weather, markets and other agricultural information?



Listening to Multiple Sources is Common

Wave 3

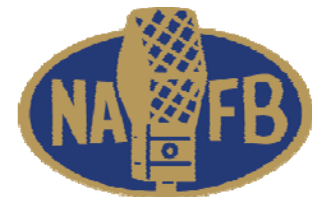
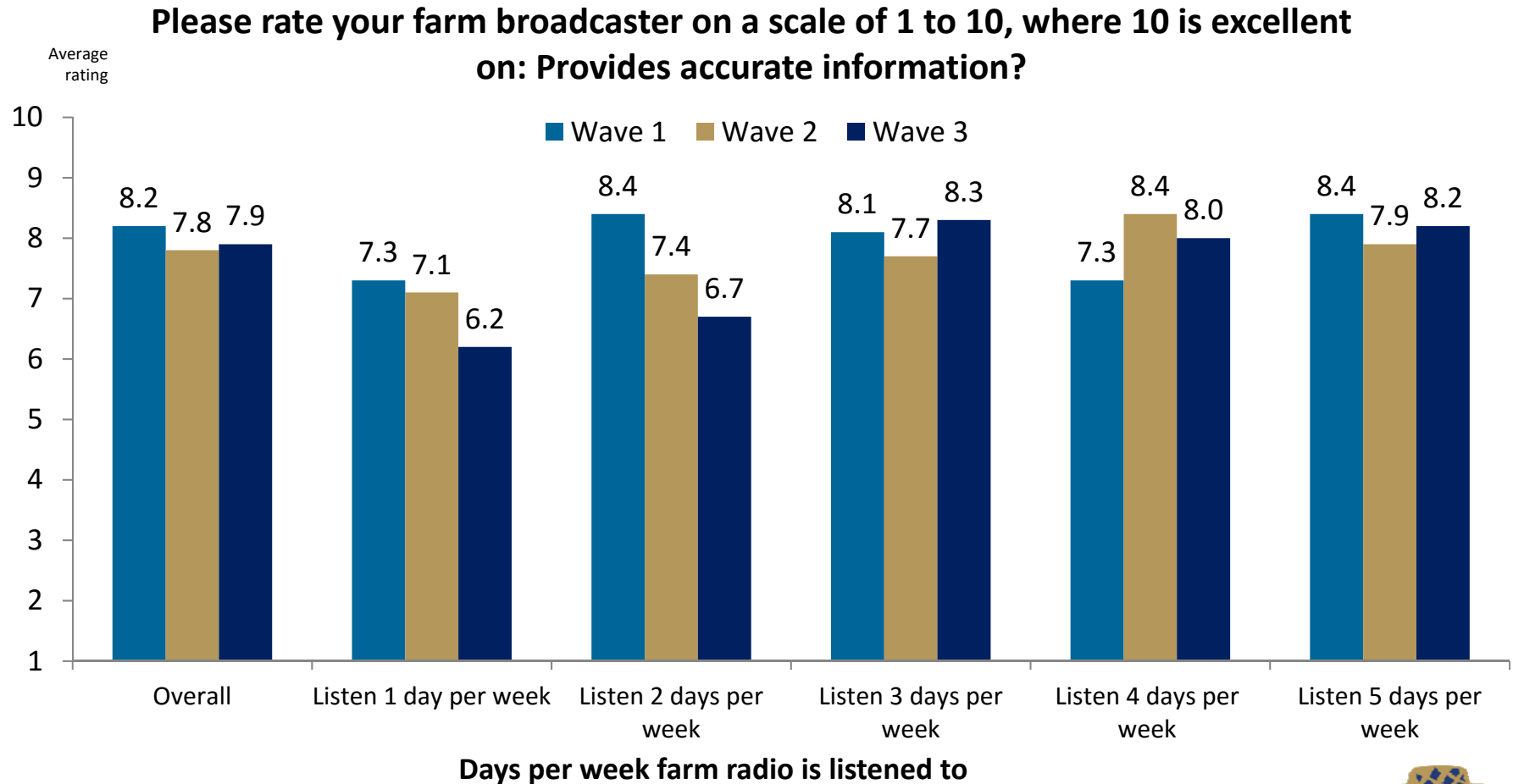


HOW ARE FARM BROADCASTERS REGARDED BY THEIR FARMER LISTENERS

Farm broadcasters are considered very credible, trustworthy and accurate by a vast majority of listeners.



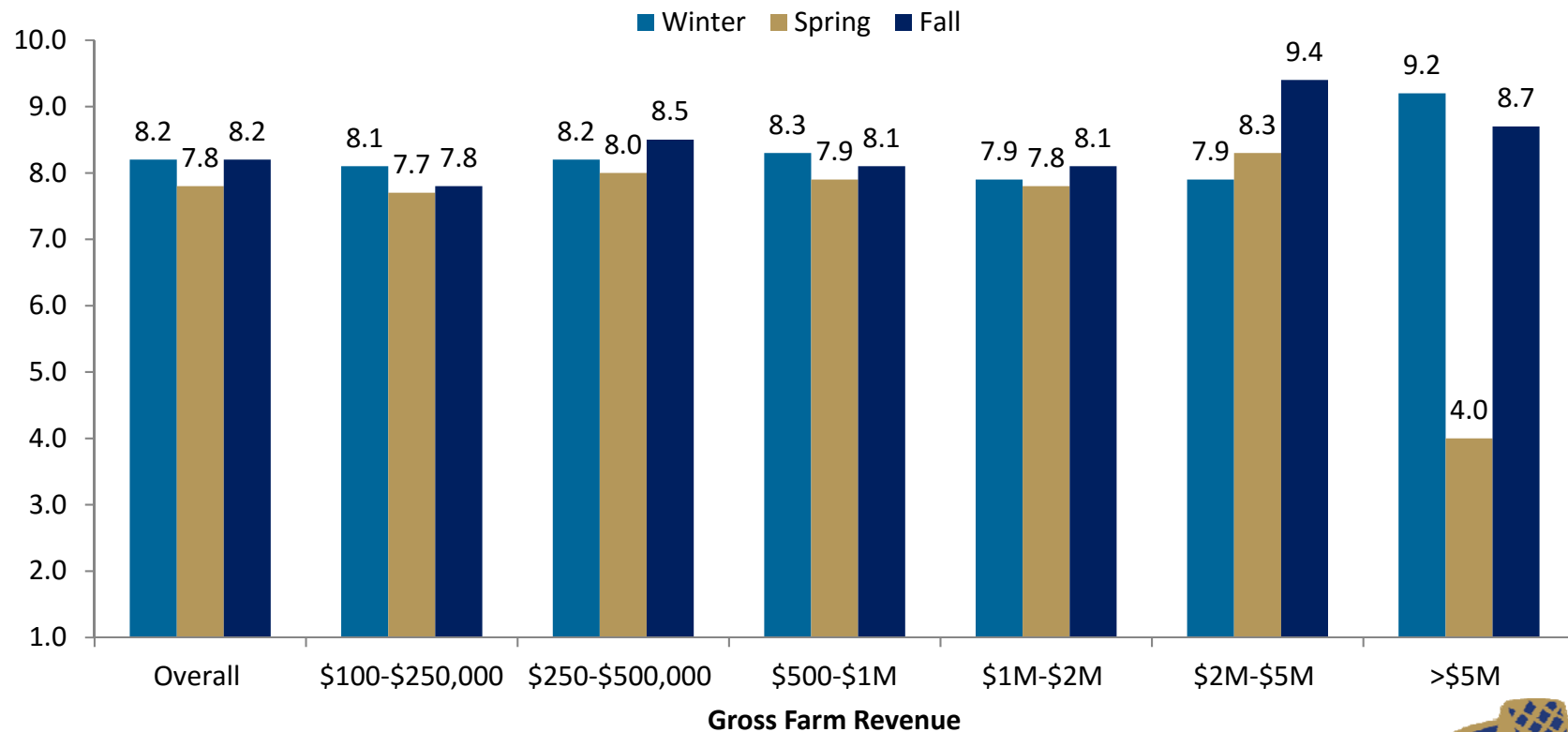
Frequent Listeners Rate Their Broadcaster Higher Than Those Who Listen Less Often



Broadcaster Accuracy Is Rated Consistently High Regardless Of Farm Revenue

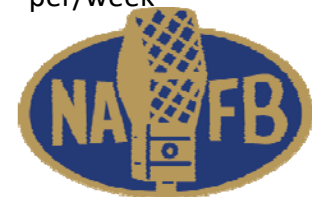
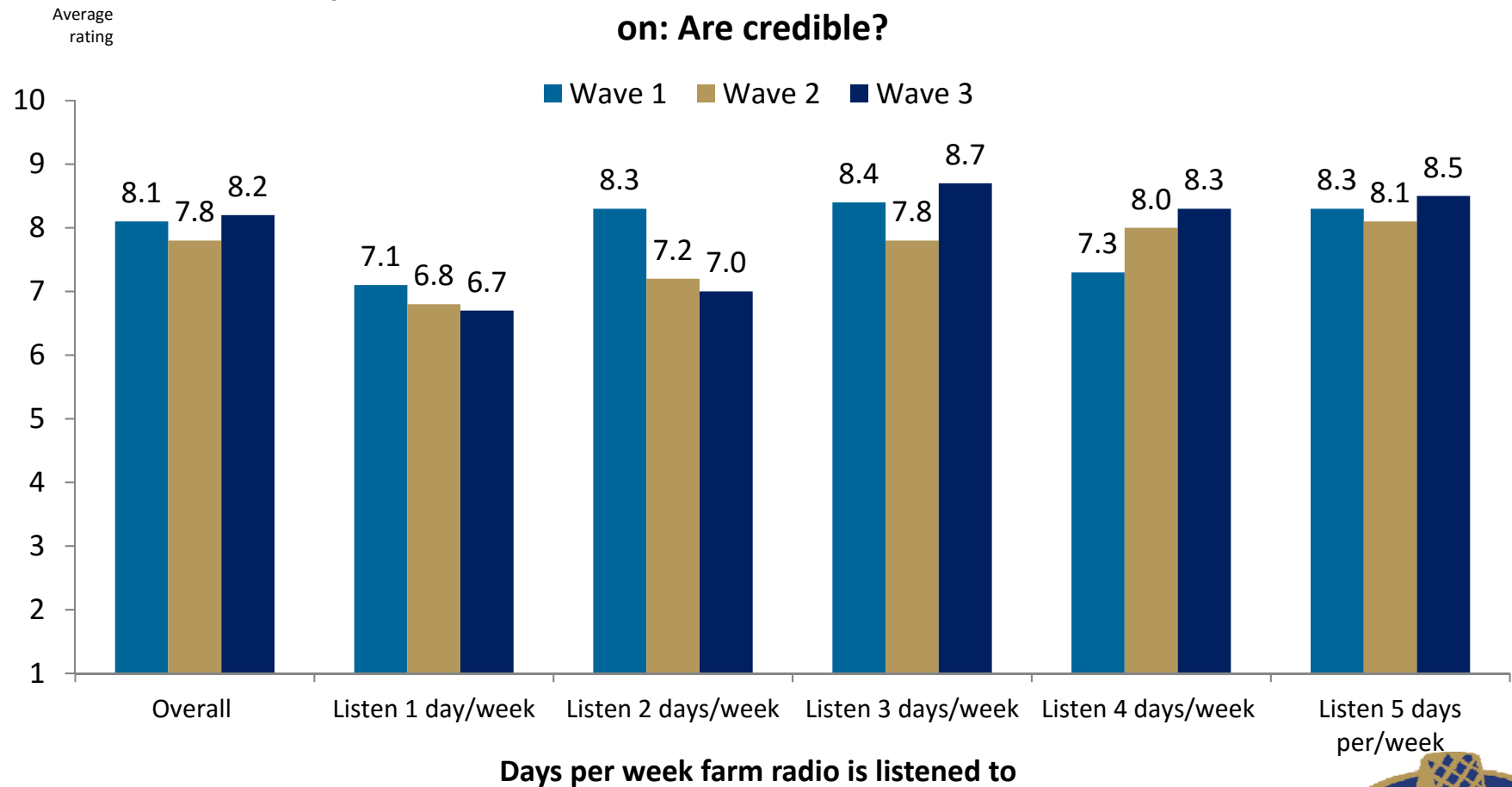
Average
rating

Please rate your farm broadcaster on a scale of 1 to 10, where 10 is excellent on:
Provides accurate information?

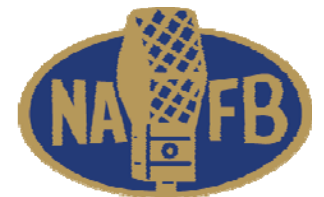
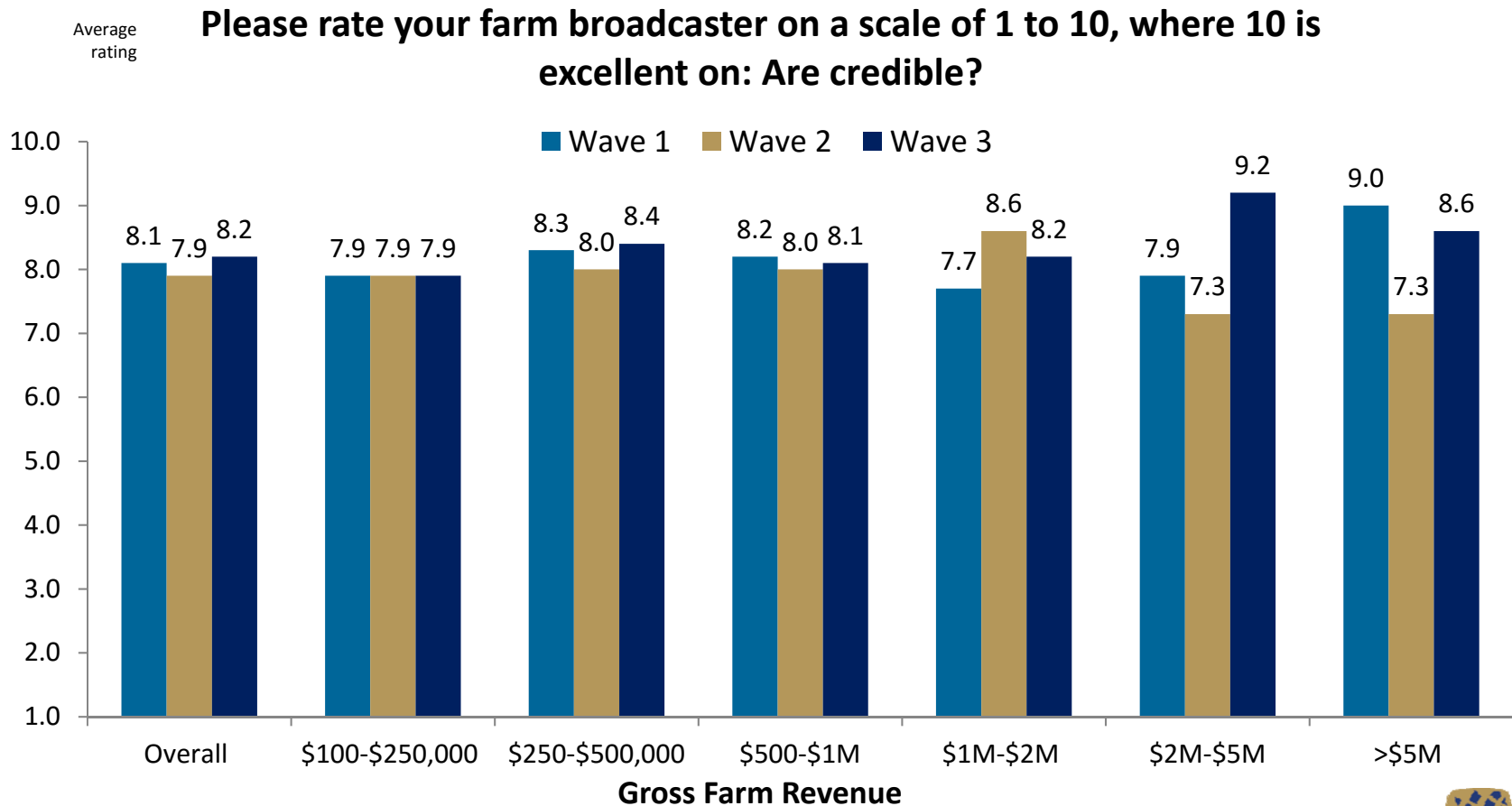


Frequent Listeners Rate Their Broadcast Higher on Credibility

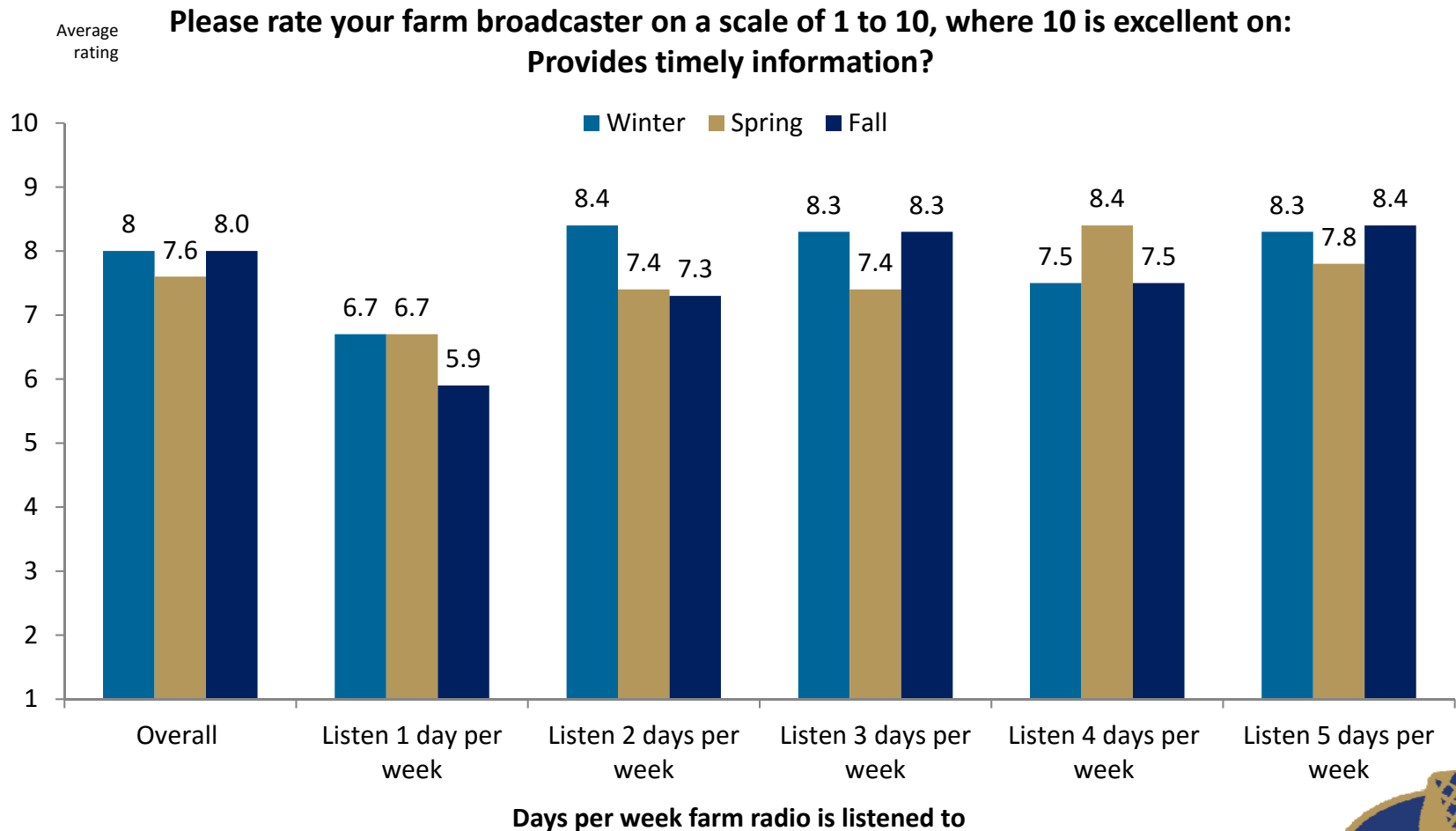
Please rate your farm broadcaster on a scale of 1 to 10, where 10 is excellent
on: Are credible?



Farmers Consistently Rate Farm Broadcaster High On Credibility

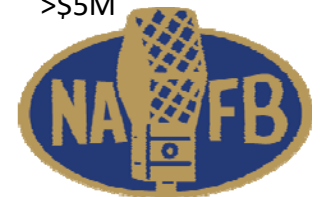
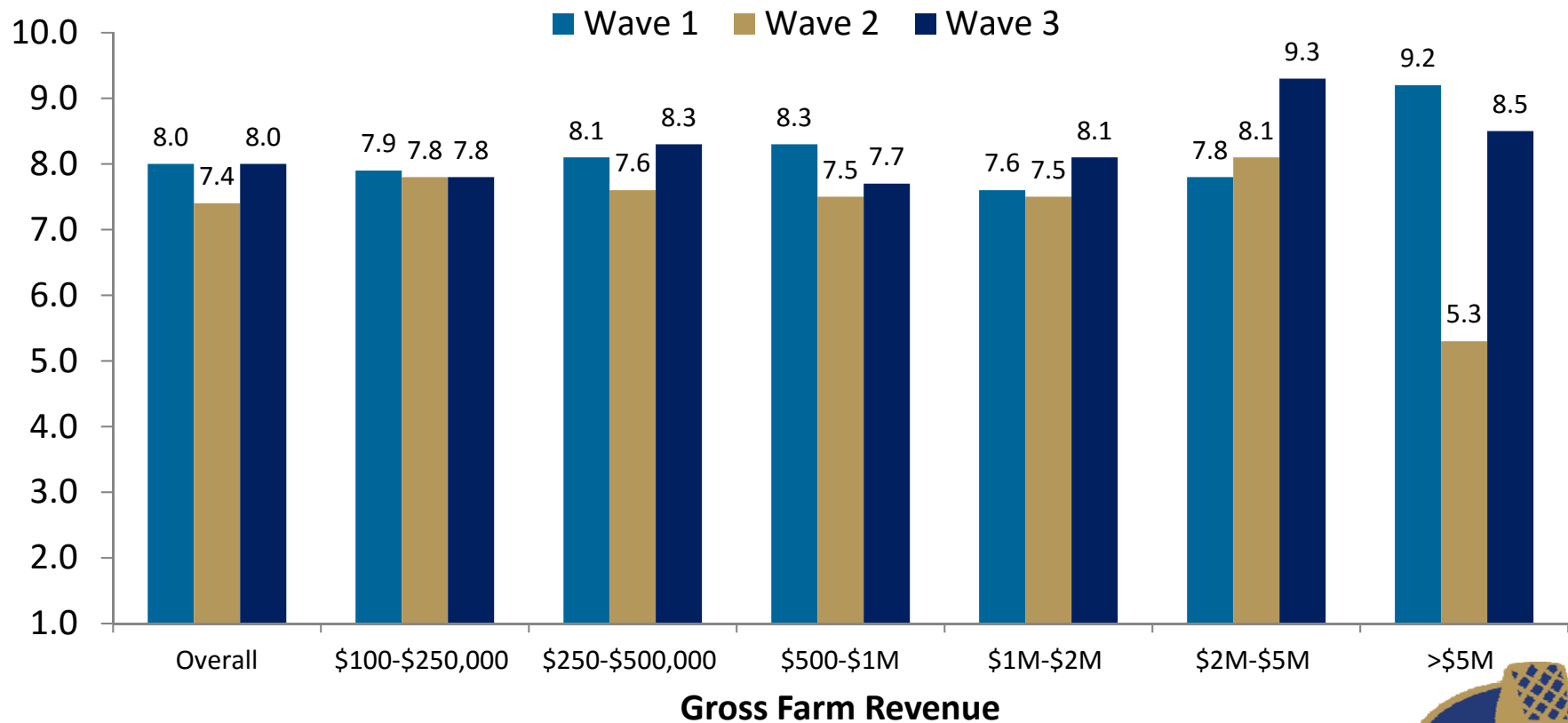


More Frequent Listeners Rate Their Broadcaster Higher On Timely Information



Listeners Rate Their Broadcasters On Providing Timely Information

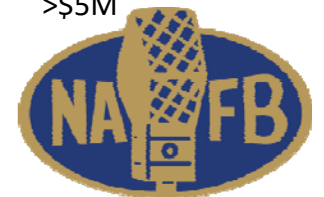
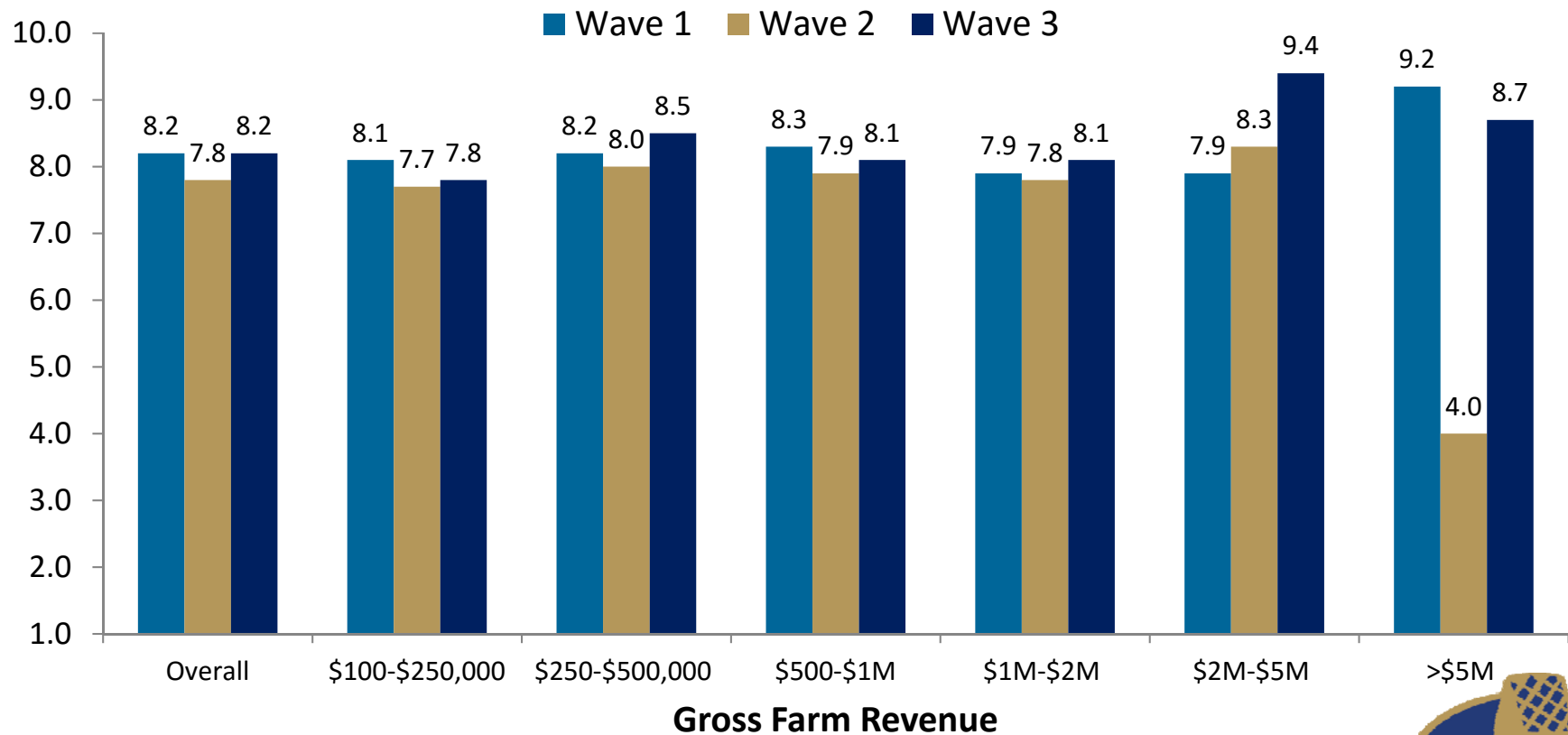
Average rating Please rate your farm broadcaster on a scale of 1 to 10, where 10 is excellent on:
Provides timely information?



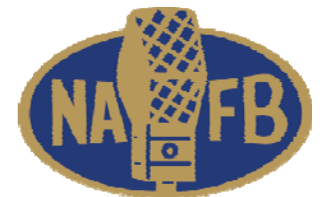
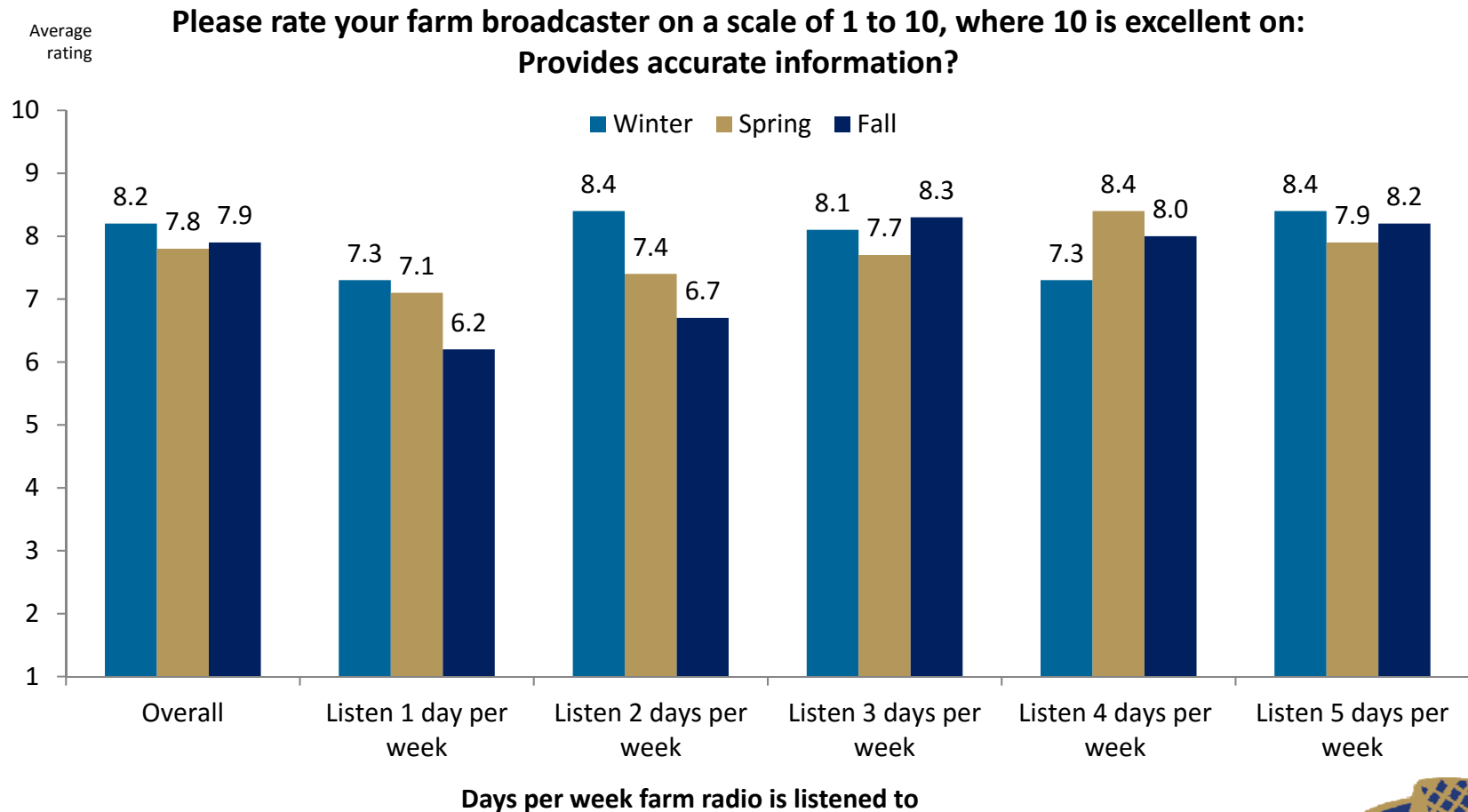
Broadcaster Accuracy Is Rated Consistently High Regardless Of Farm Revenue

Average
rating

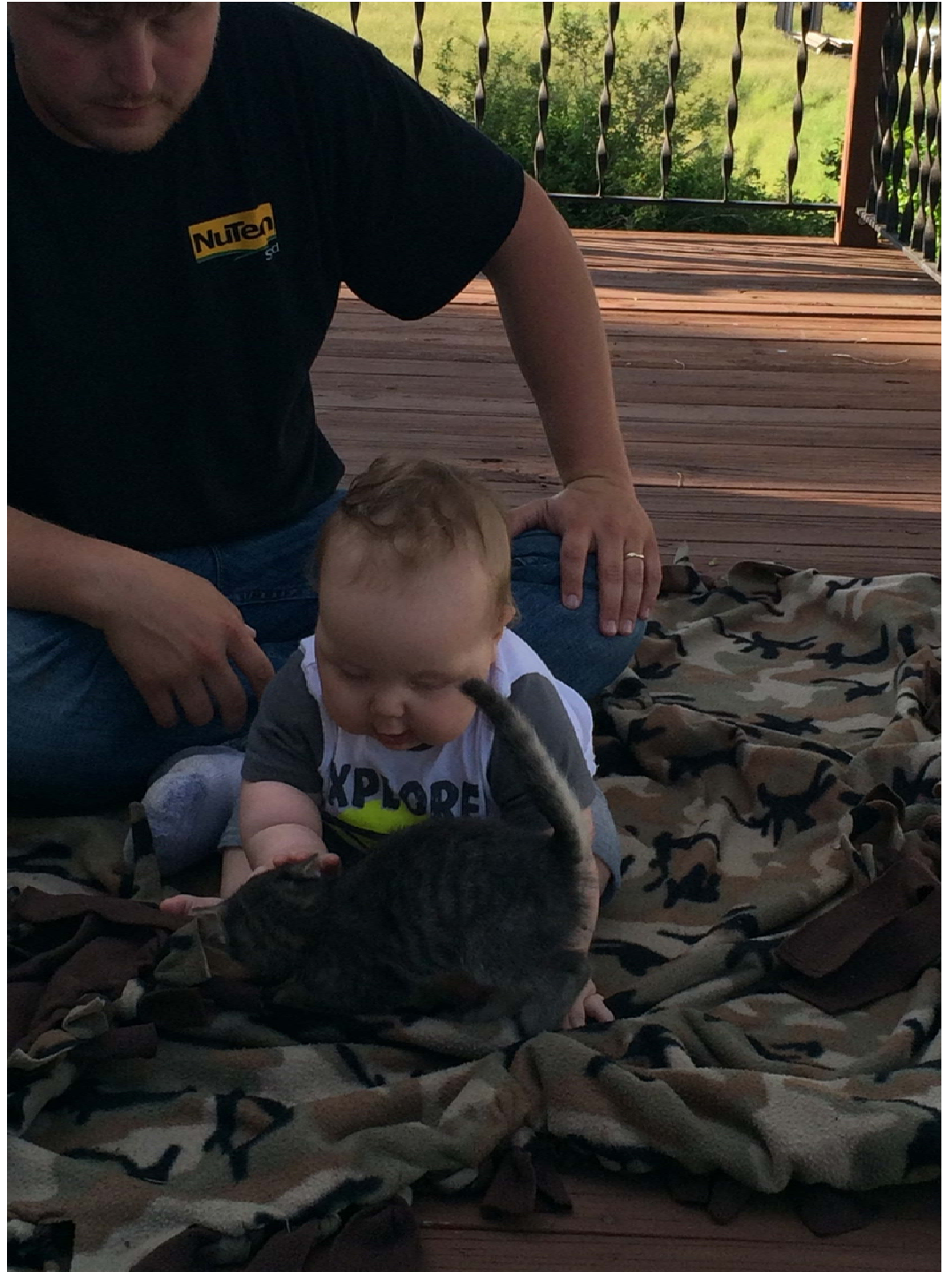
Please rate your farm broadcaster on a scale of 1 to 10, where 10 is excellent
on: Provides accurate information?



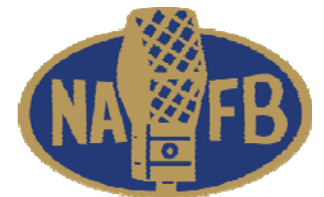
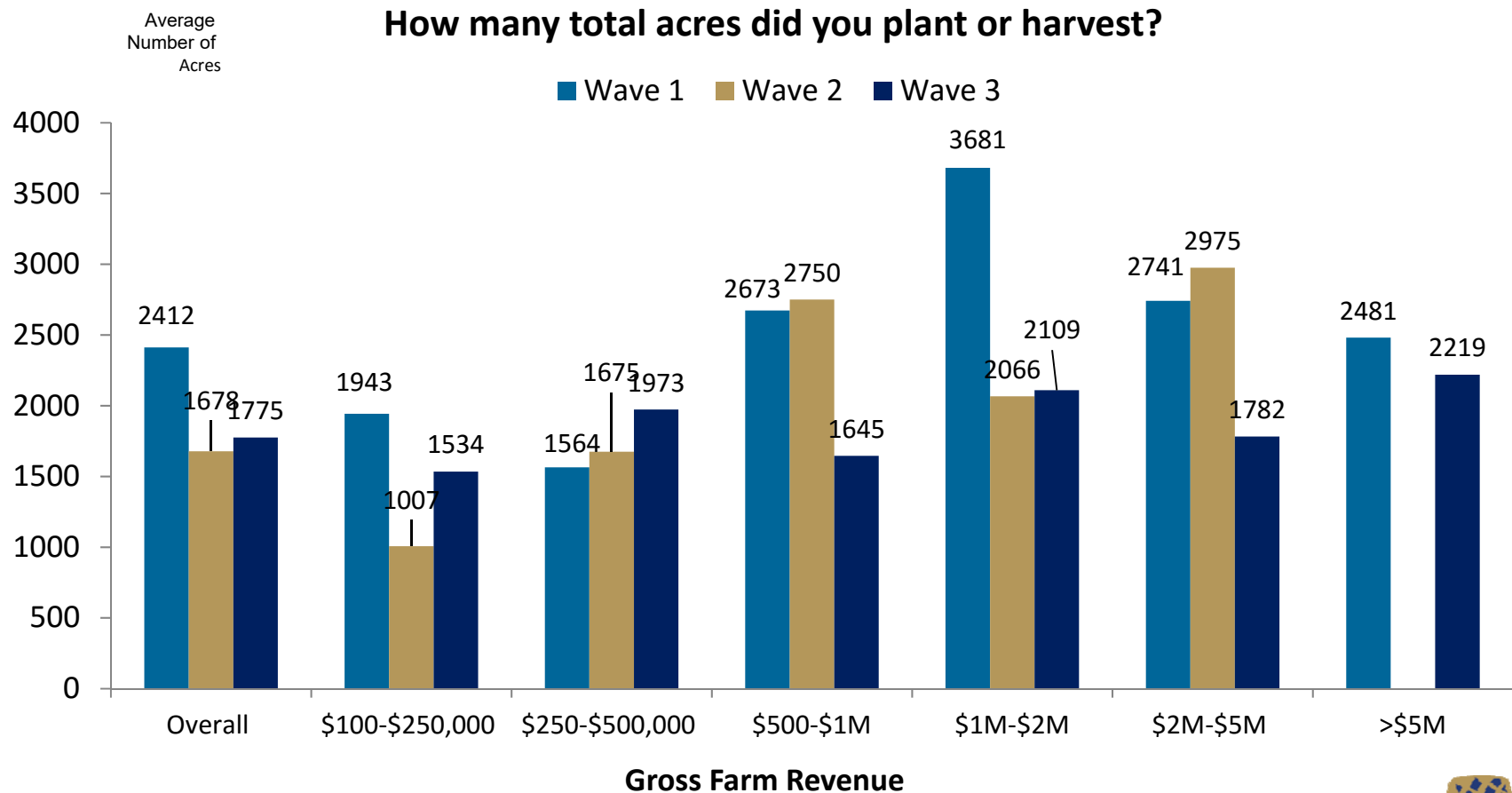
Frequent Listeners Rate Their Broadcaster Higher On Accurate Information



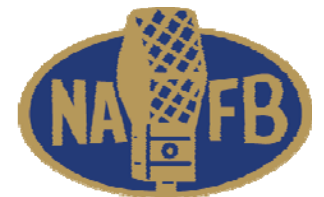
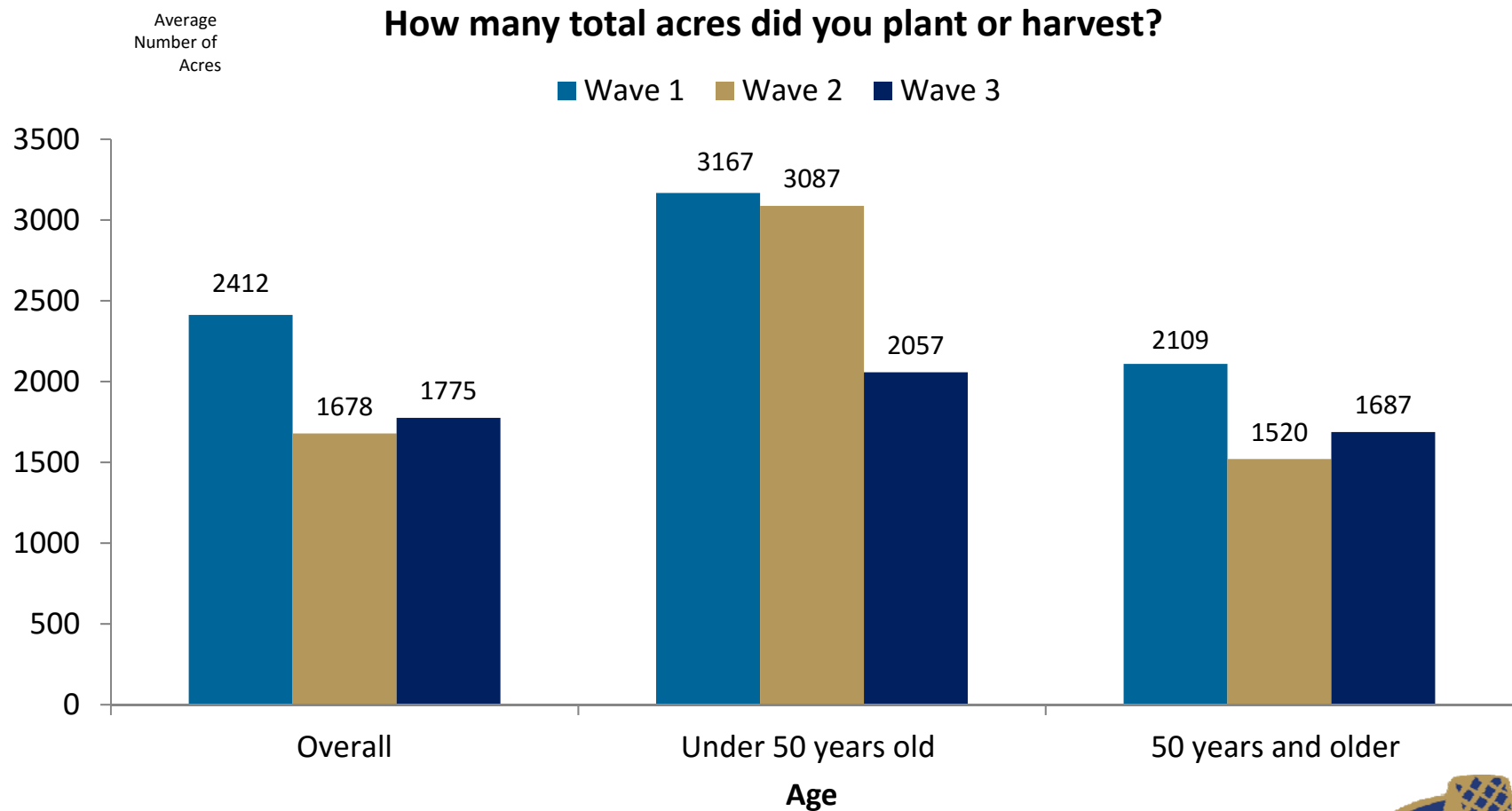
RESPONDENT PROFILE



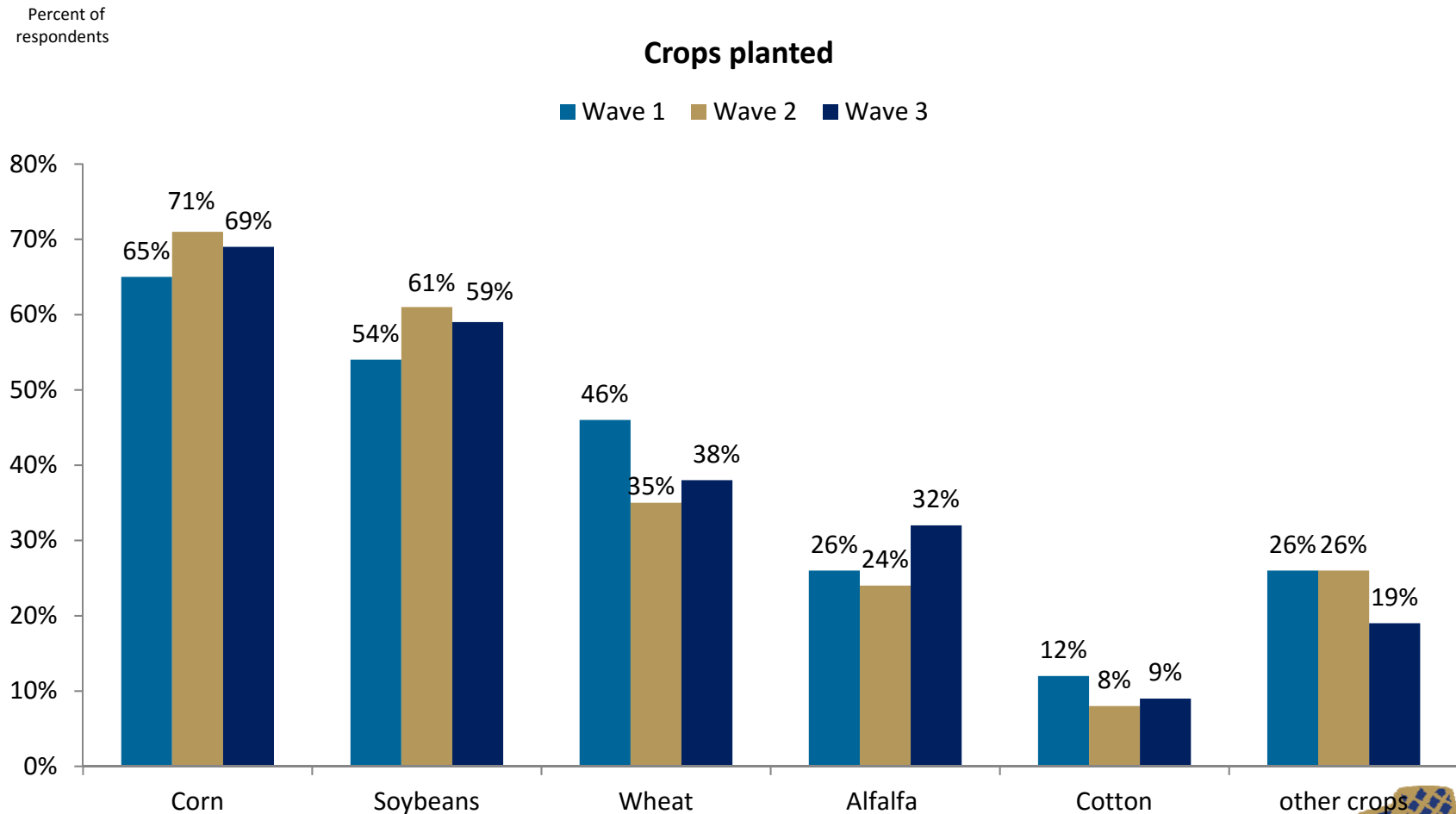
On Average, Respondents Farm Almost 1,700 Acres



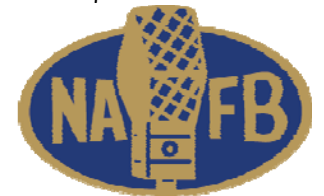
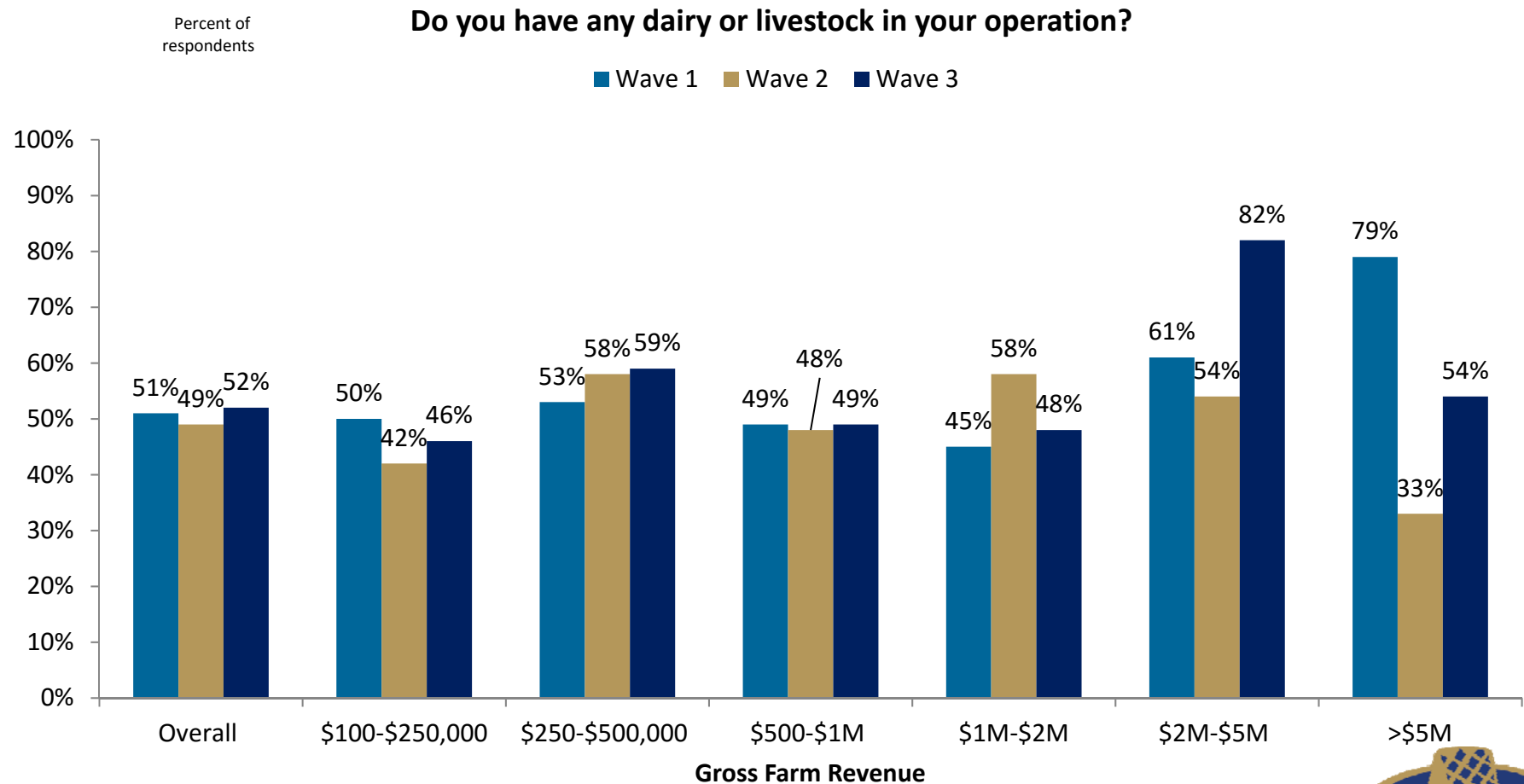
In The Winter And Spring Waves, Much Greater Difference In Acres Based On Age Of Respondent



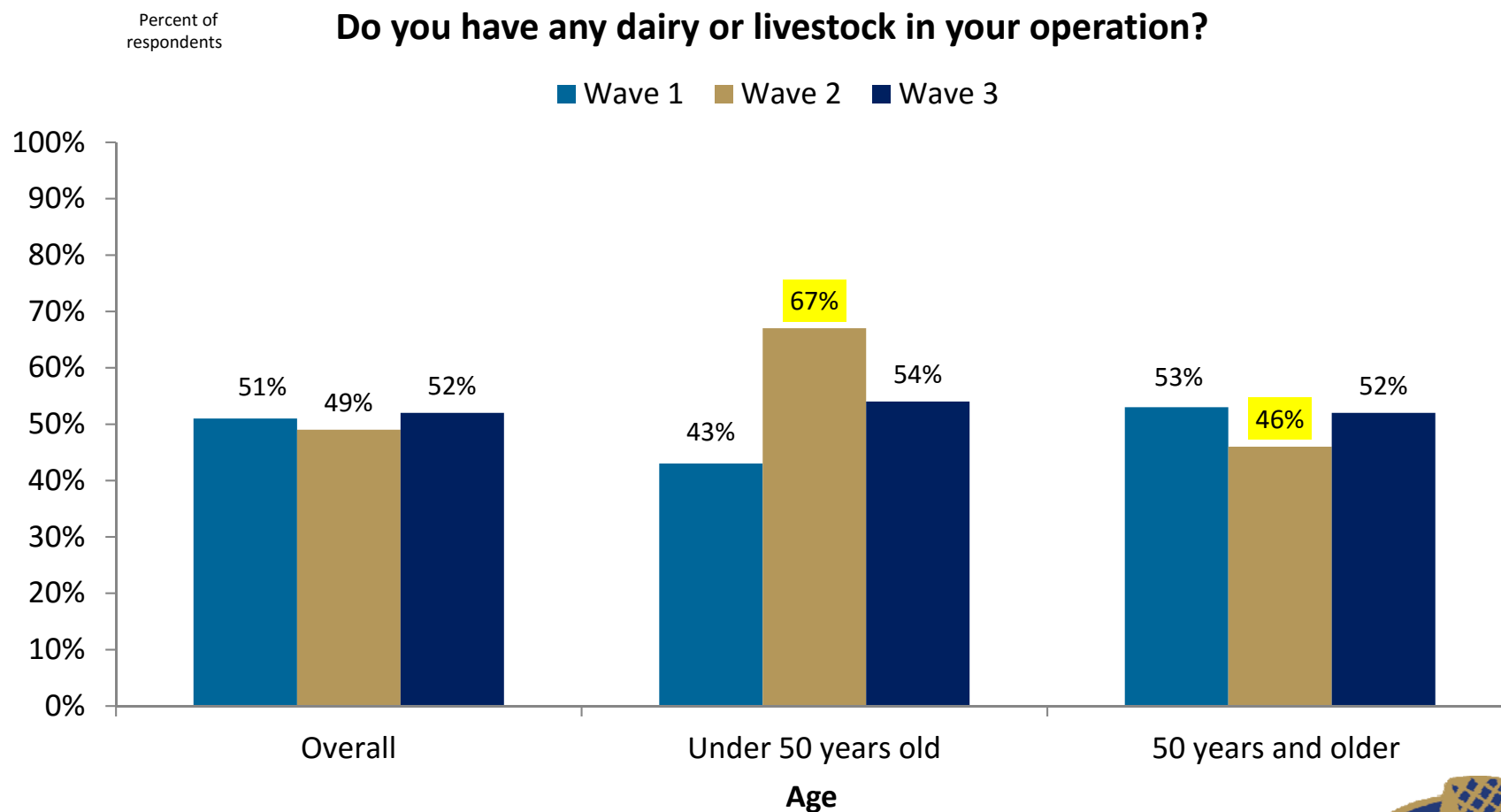
Corn Is The Most Frequently Planted Crop By Respondents



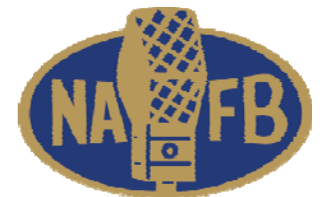
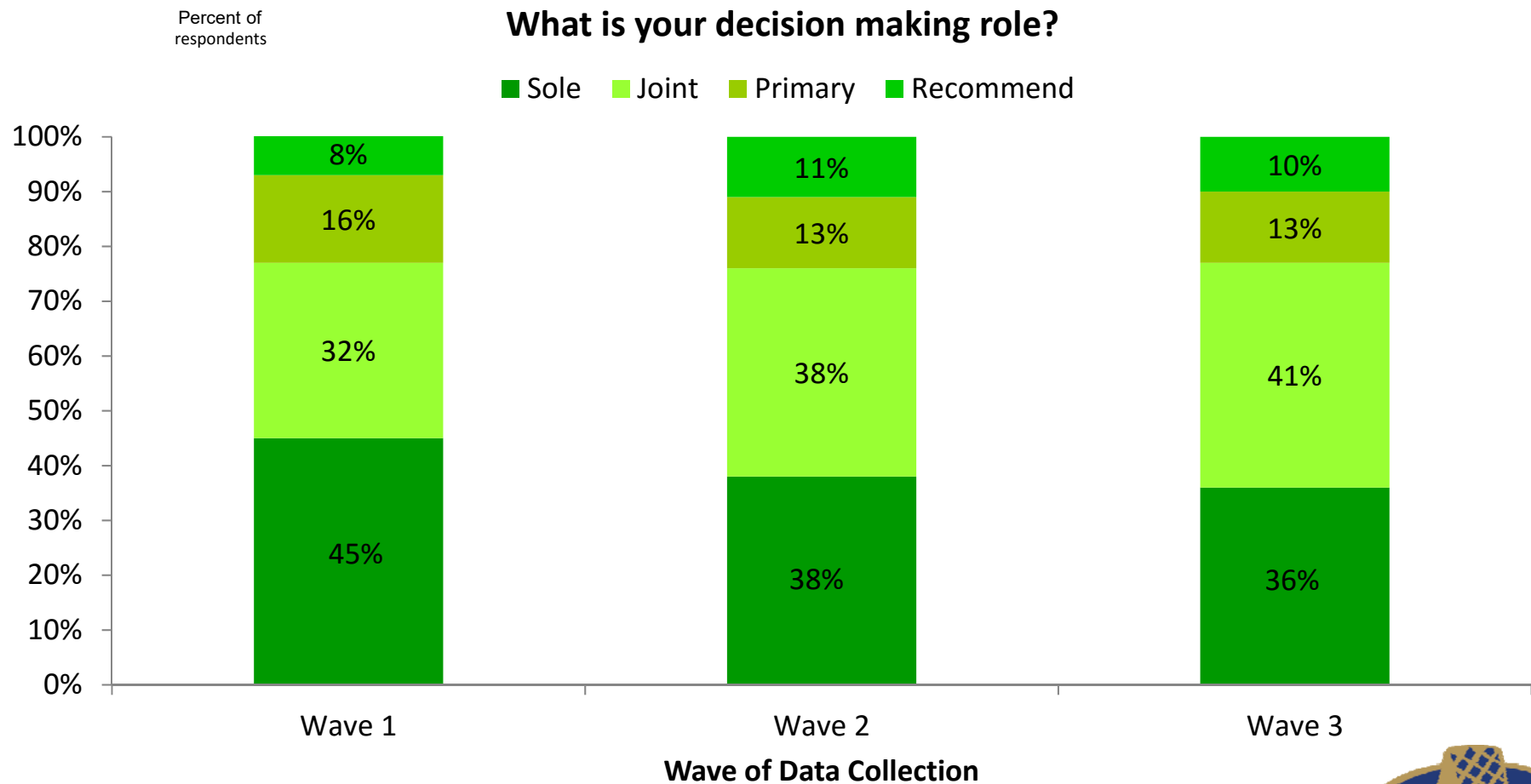
Half Of Respondents Have Livestock Or Dairy Operations



Young Farmers More Likely To Have Livestock Or Dairy



Decision Making Roles Are Similar From Wave to Wave



Thank You.



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