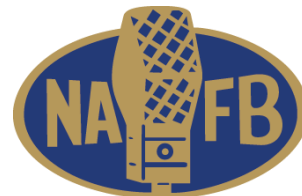




Farm Radio Connects

Research Conducted by
Millennium Research



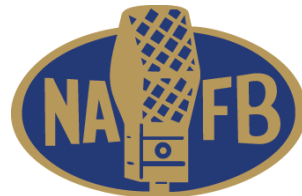
Listening With A Purpose

- 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

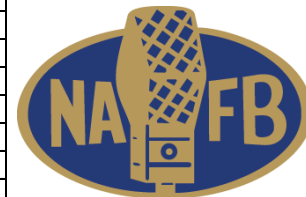
Wave 1-4 Research



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
- Wave 4 = December
- 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.



Working in shop.

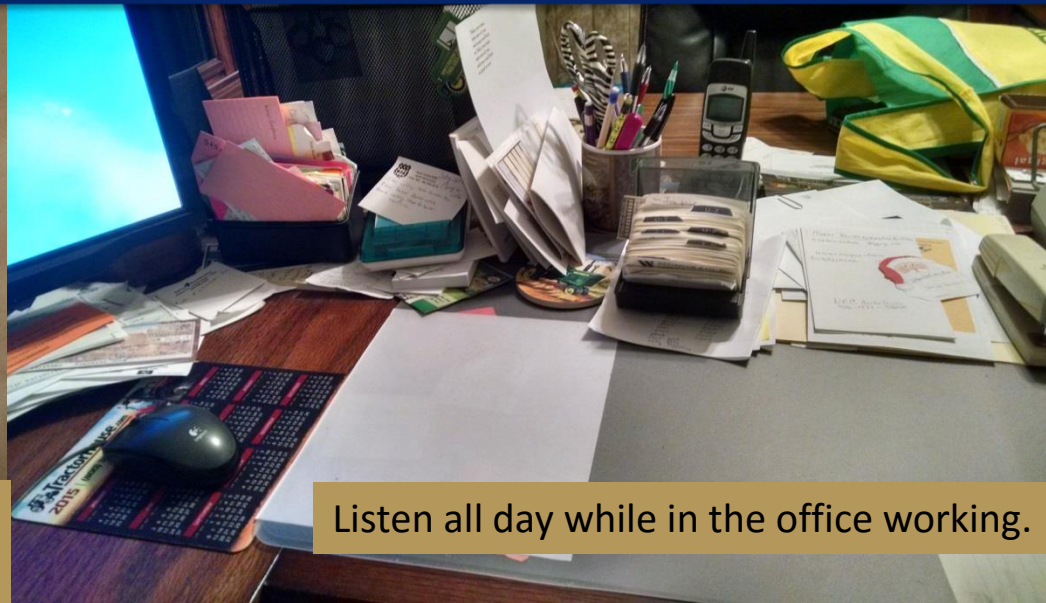
Spraying fallow weed control, going back to the water truck to fill again.



Farm radio is part of everyday life on a farm operation.



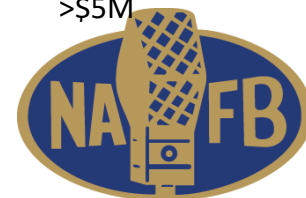
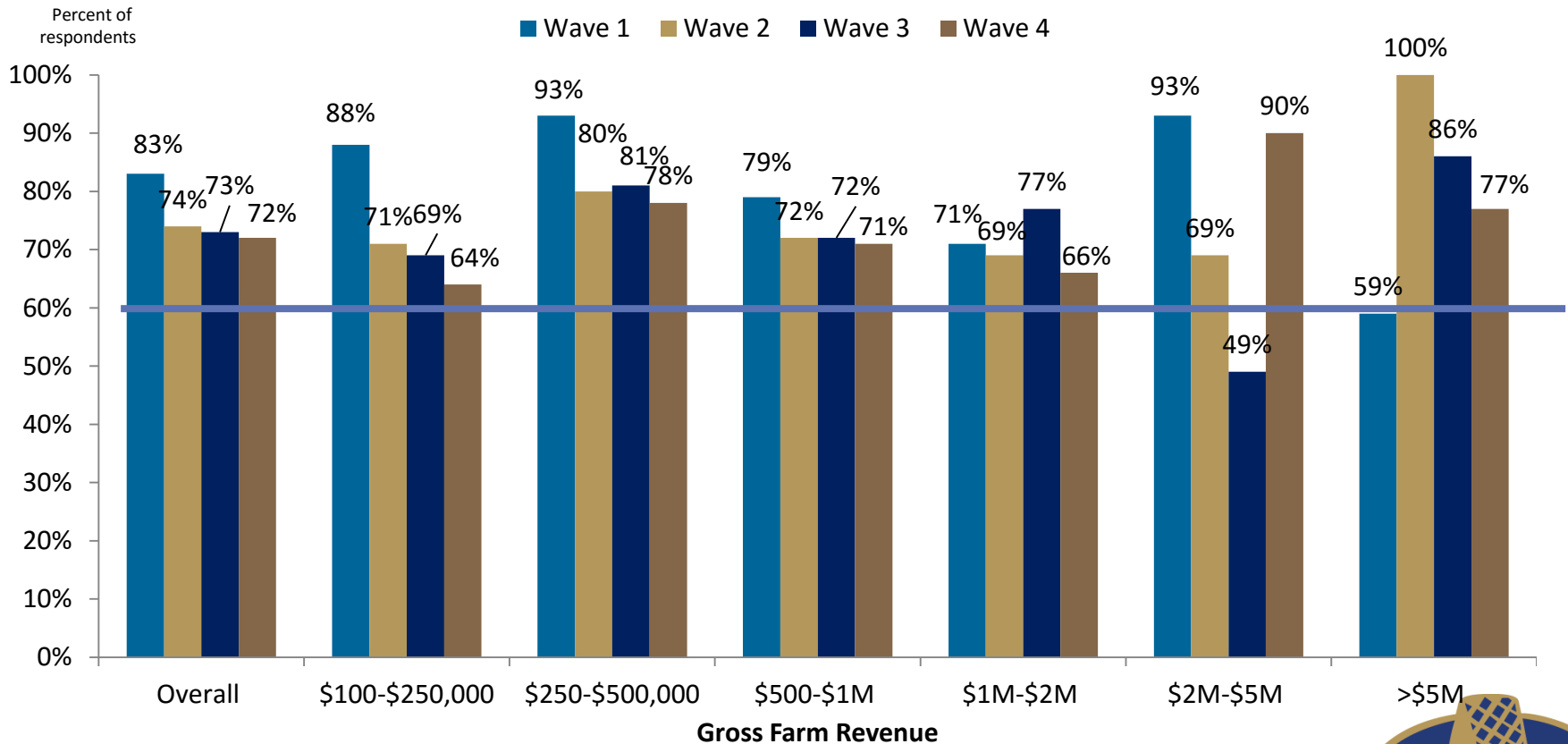
I was eating a slice of watermelon and making a ham sandwich while listening to the radio.



Listen all day while in the office working.

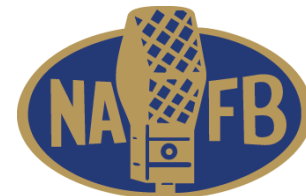
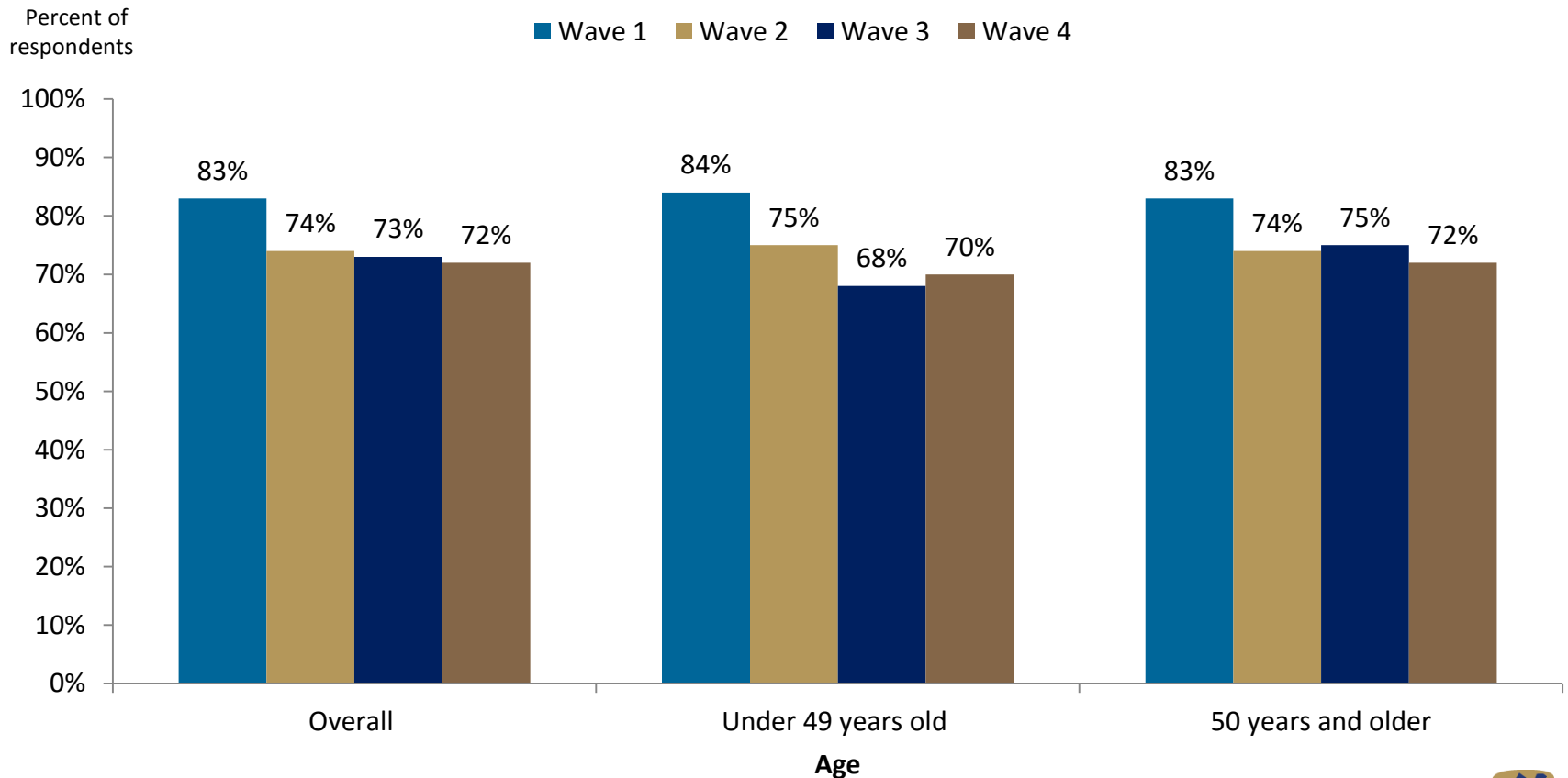
76% Of Farmers Listen To Farm Radio

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



Consistent Radio Listening Habits All Year – Farm Radio Is A Habit

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

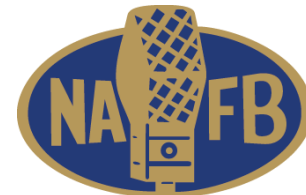
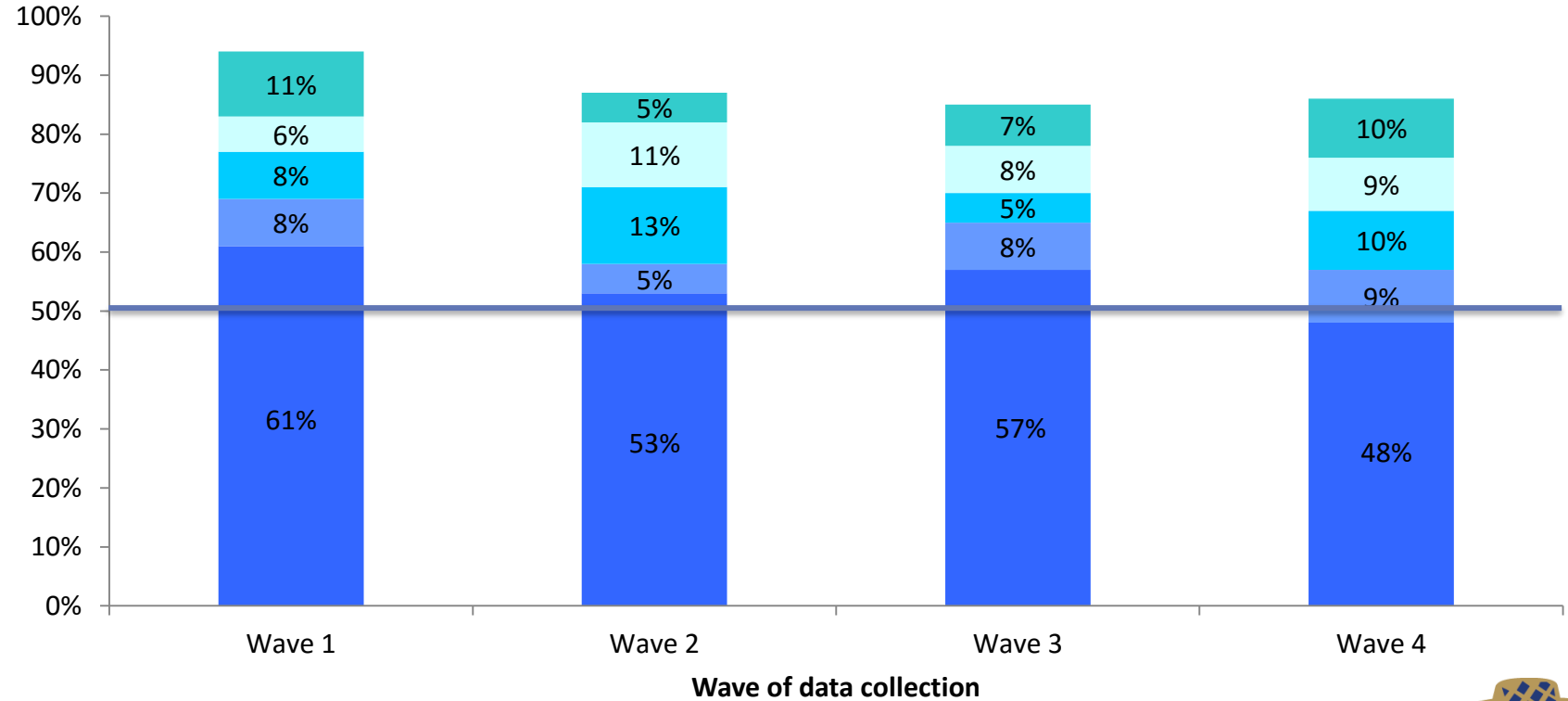


Daily Listenership Is Consistent All Year - 71% Listen 3+ Days Per Week

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

Percent of respondents

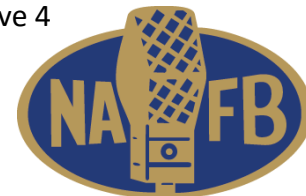
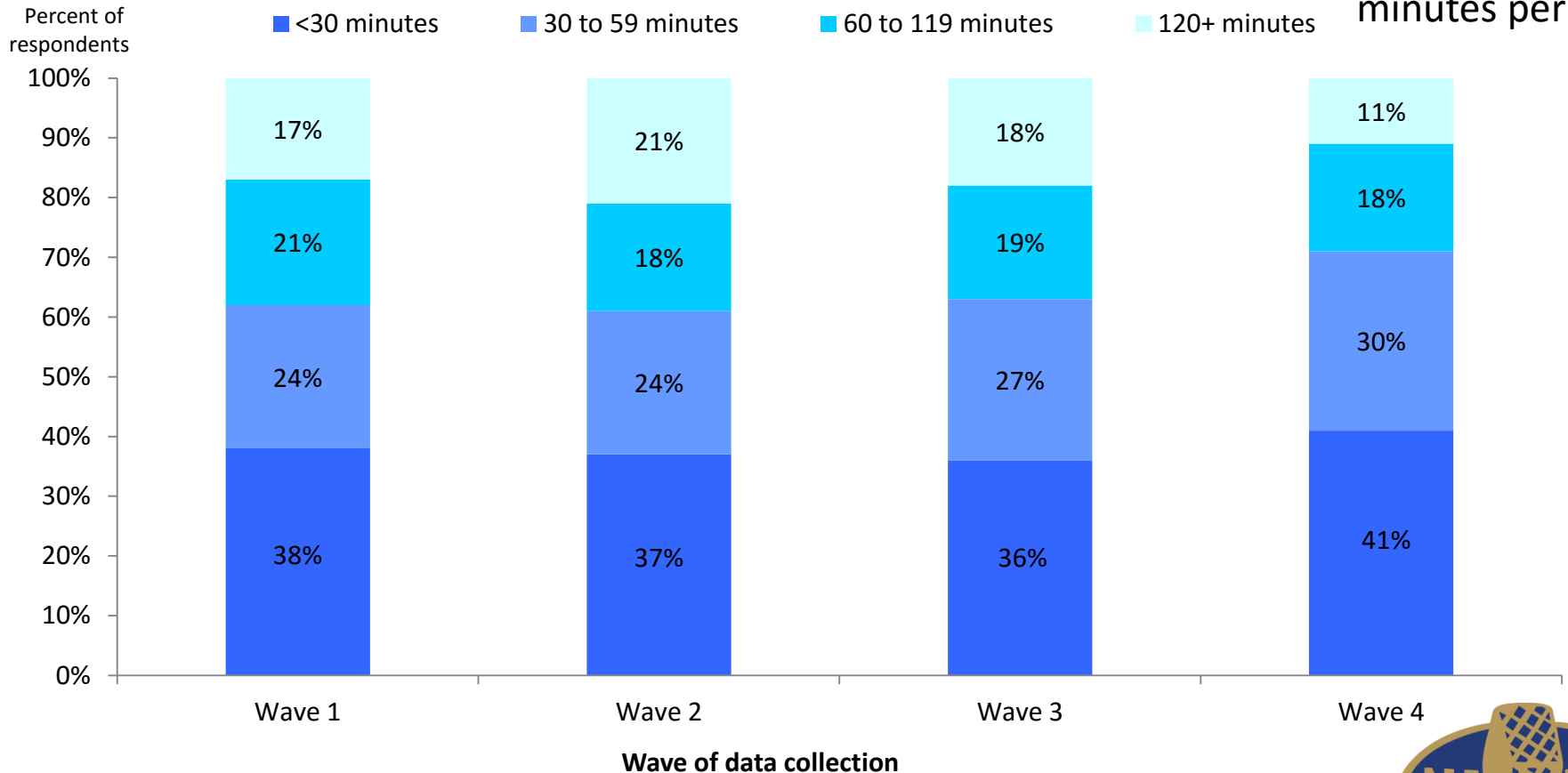
■ Five days ■ Four days ■ Three days ■ Two days ■ One day



Farmers Connect With Radio Daily

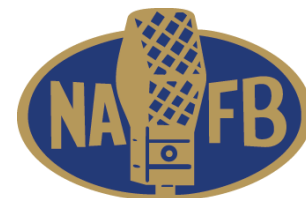
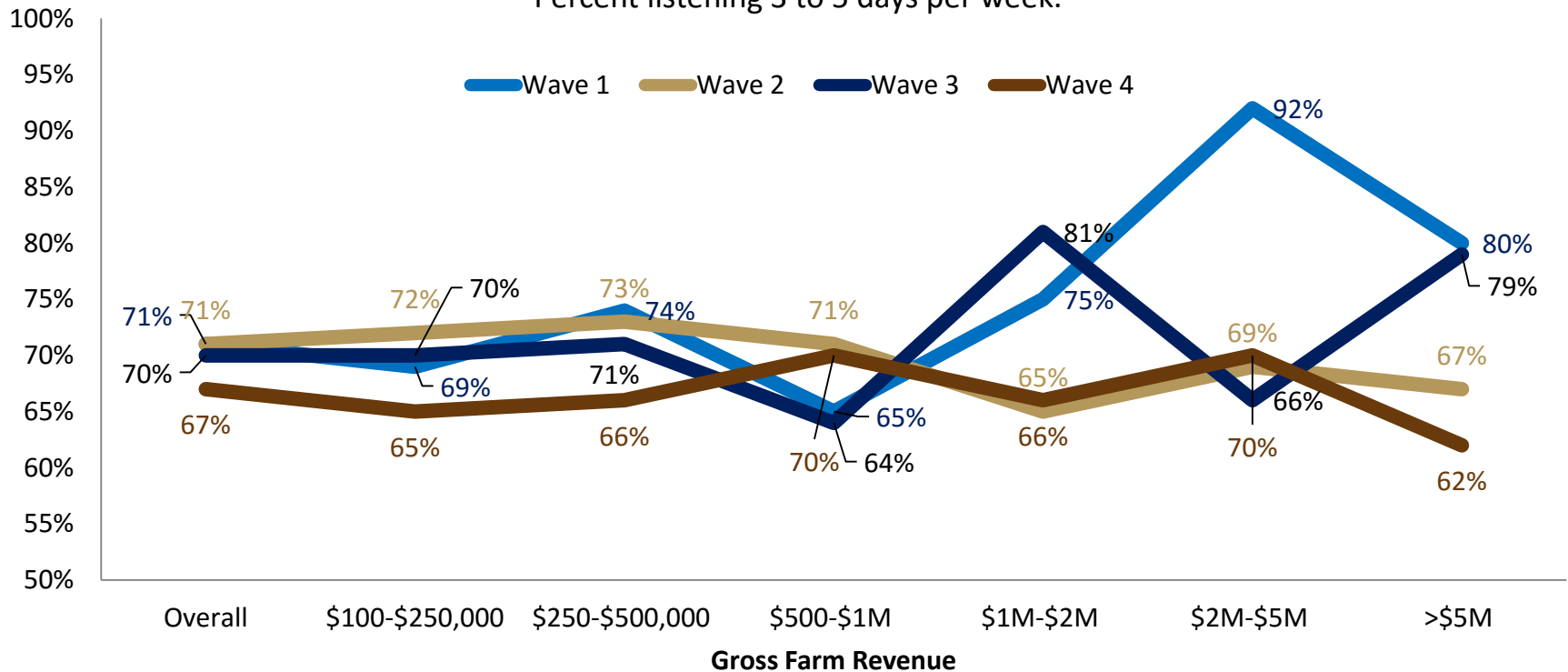
On a typical weekday during this time of year, how many minutes do you spend listening to farm radio news, weather, markets and information?

- 64% up to 60 minutes/day
- 35% 60+ minutes per day



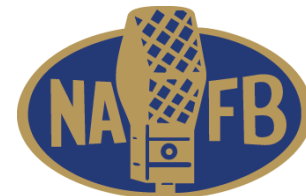
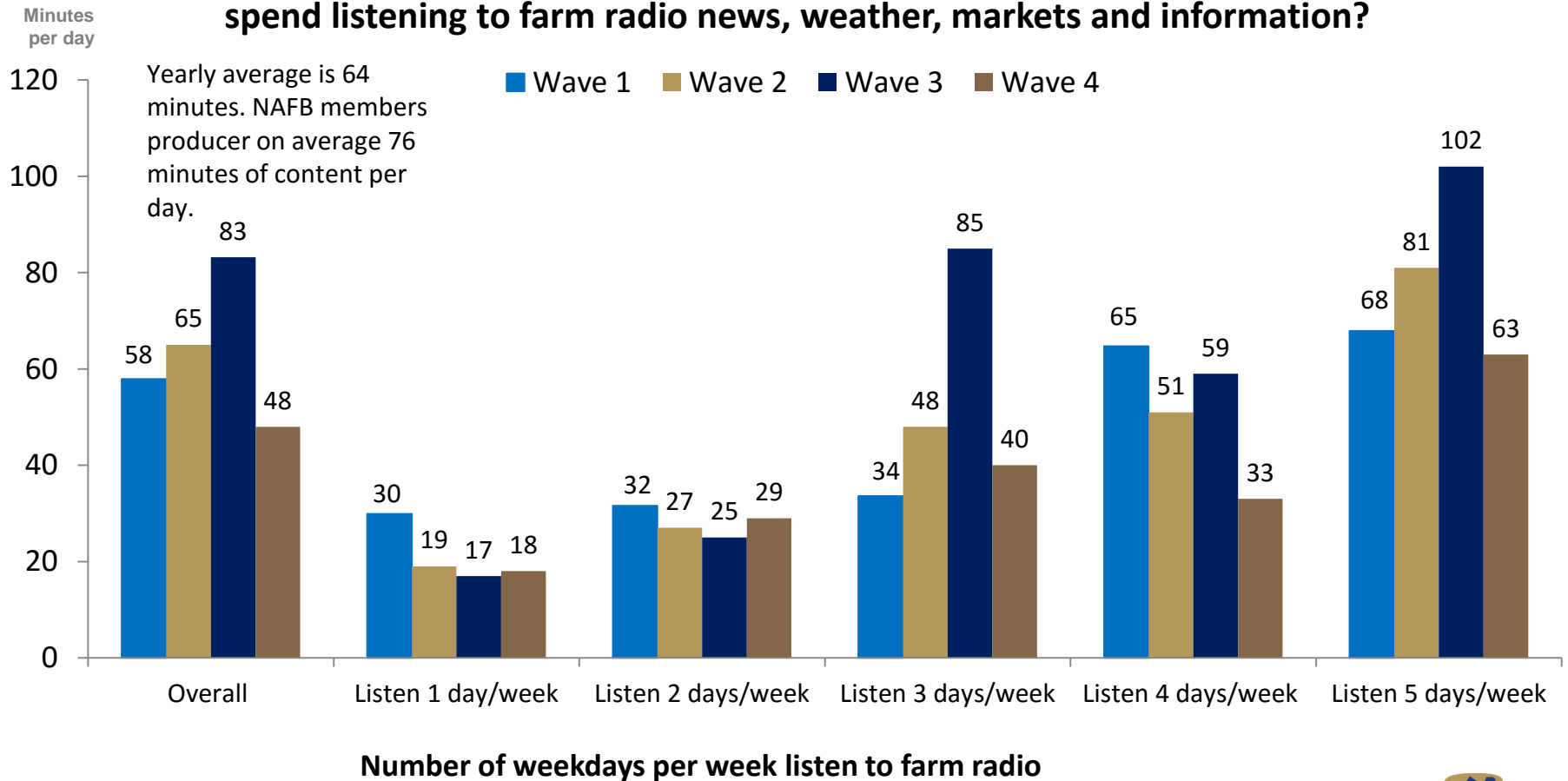
Farmers Are Regular Listeners

How many days a week (Monday – Friday) do you listen to farm radio?
Percent listening 3 to 5 days per week.



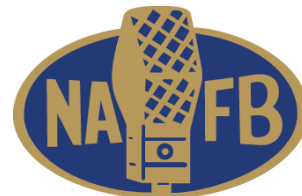
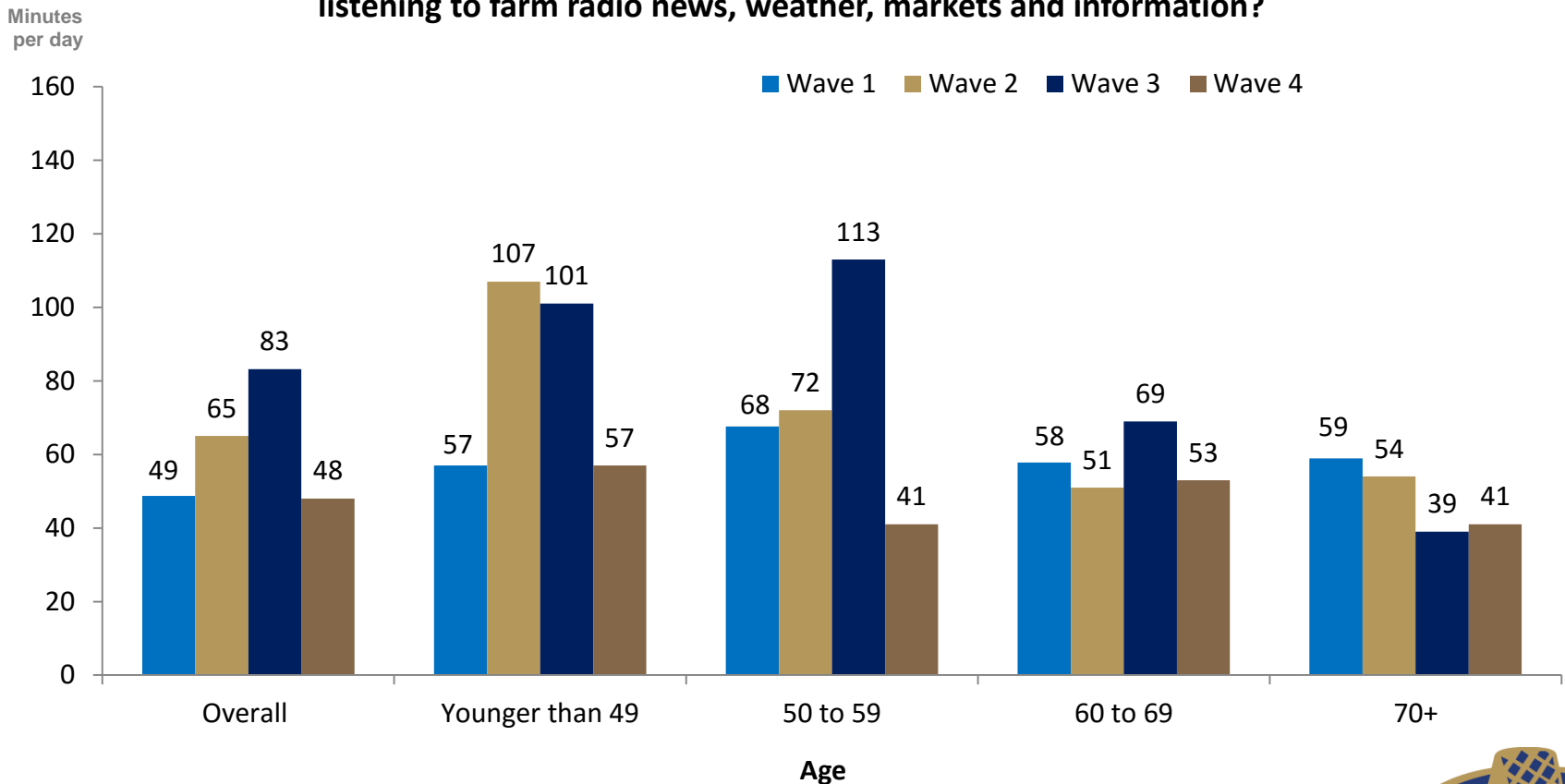
Frequent Listeners, Listen Longer

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

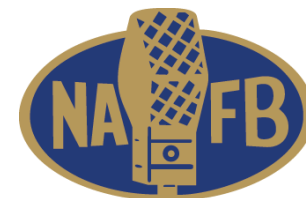
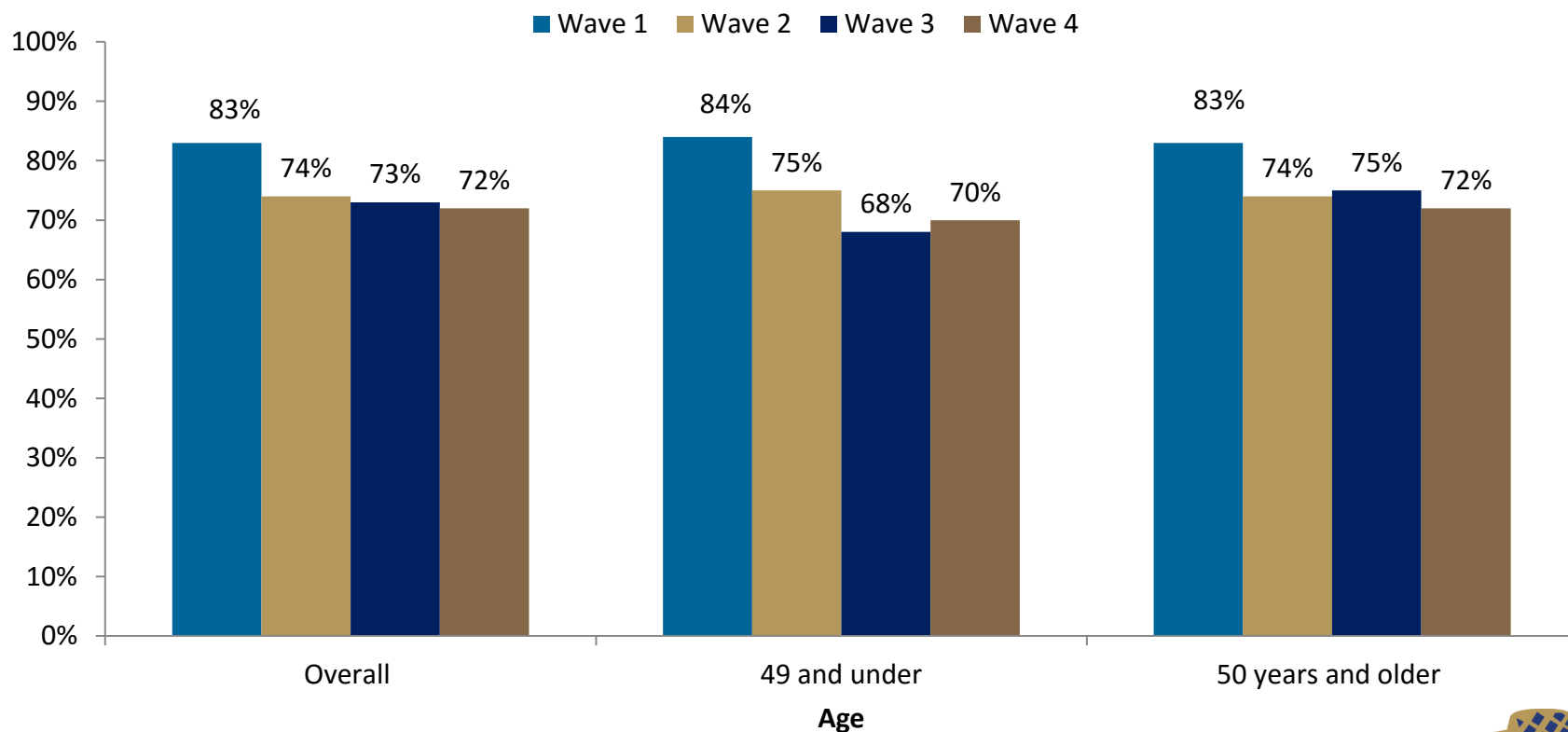
On a typical weekday during this time of year, how many minutes do you spend listening to farm radio news, weather, markets and information?



74% of Farmers 49 and Under Listen To Farm Radio

Percent of respondents

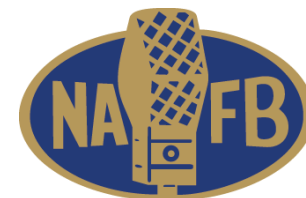
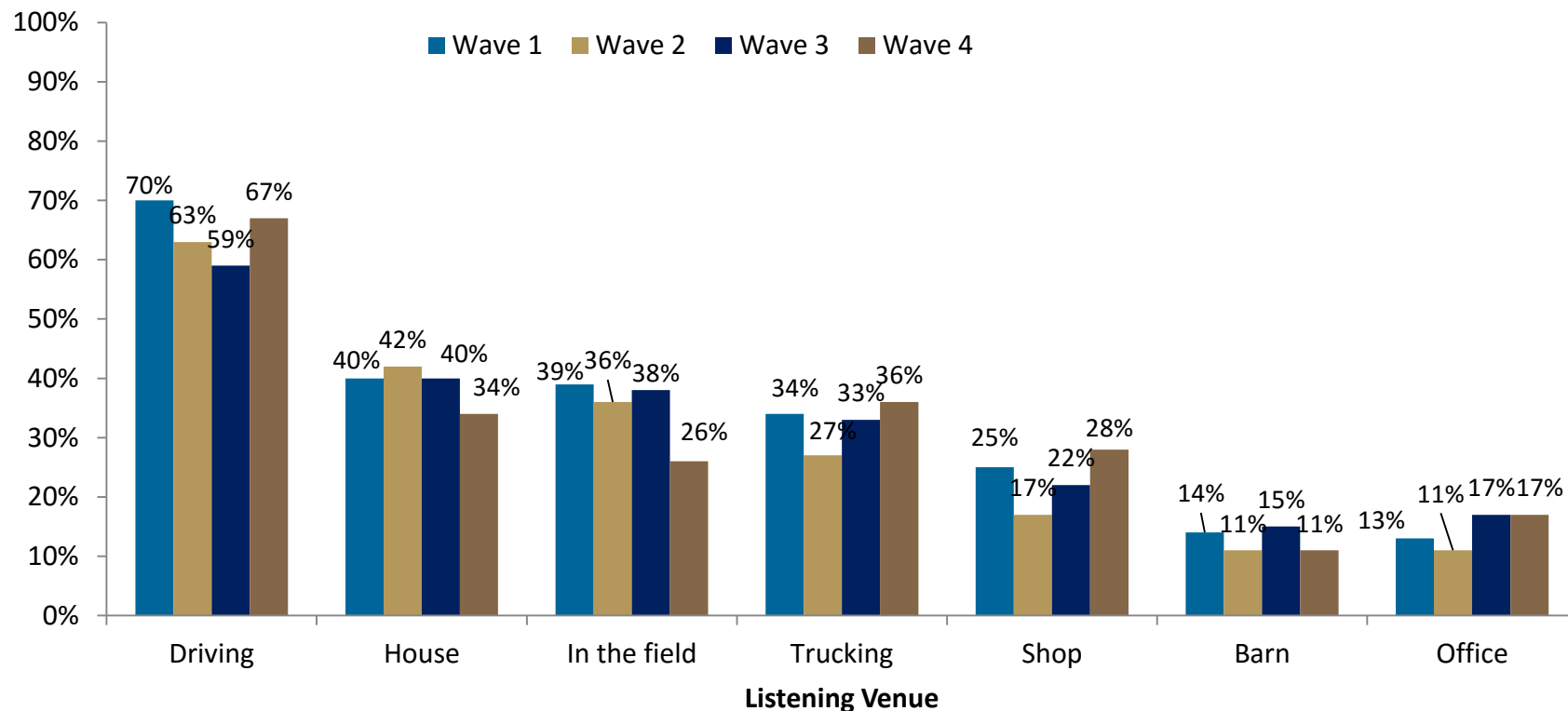
Do you listen to farm news, weather, markets and ag information during this time of year?



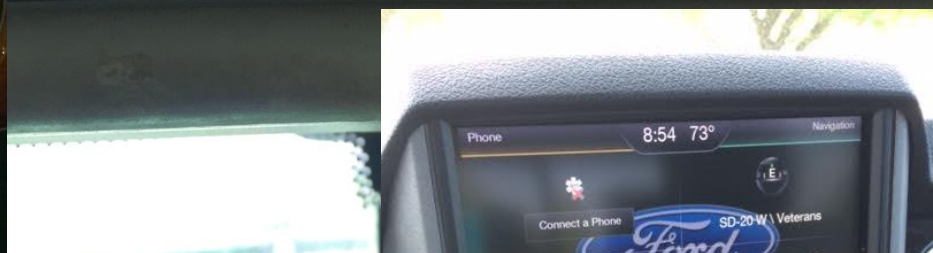
Radio Delivers Throughout The Day No Matter The Location

Percent of respondents

Where do you listen to farm news, weather and commodity markets on the radio at this time of year?



Radio is mobile. It goes with the farmer all day long.



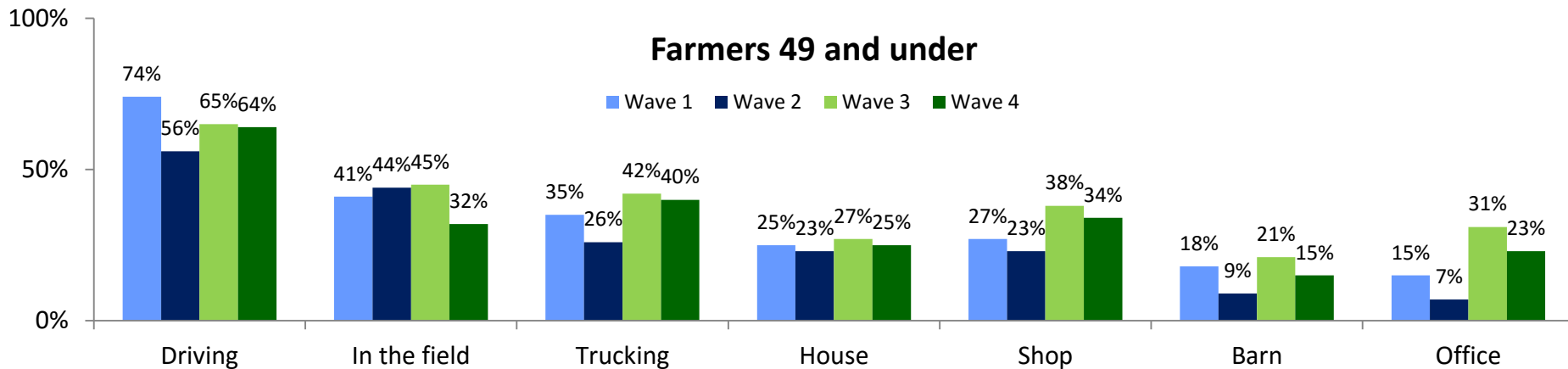
Comparison of Radio Listening Locations By Age

Where do you typically listen to farm news, weather and commodity markets on the radio at this time of year?

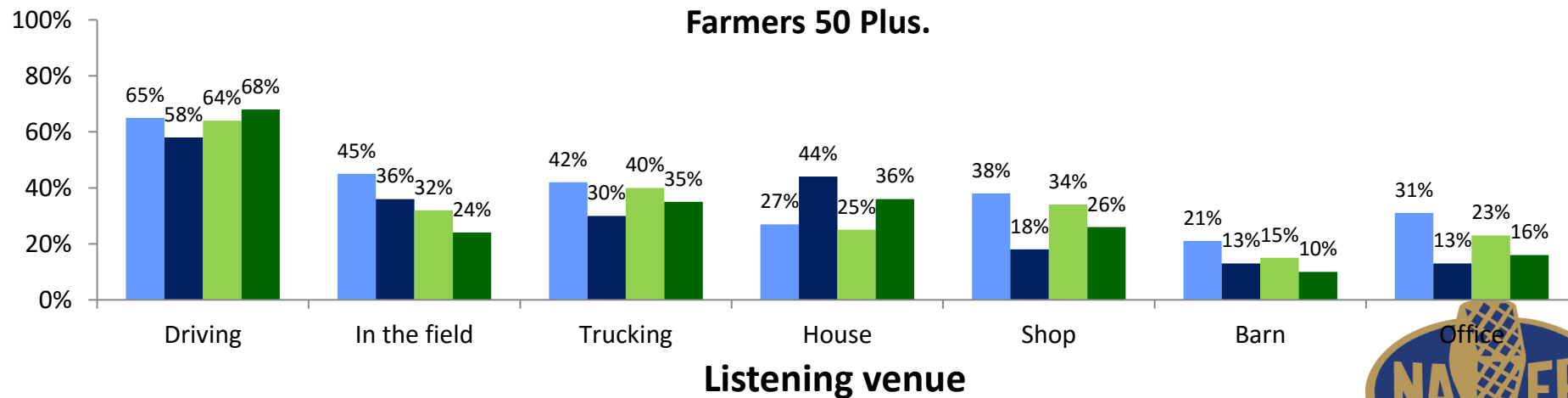
Percent of respondents

Farmers 49 and under

Wave 1 Wave 2 Wave 3 Wave 4



Farmers 50 Plus.



Listening venue

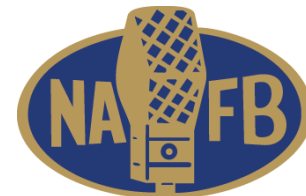
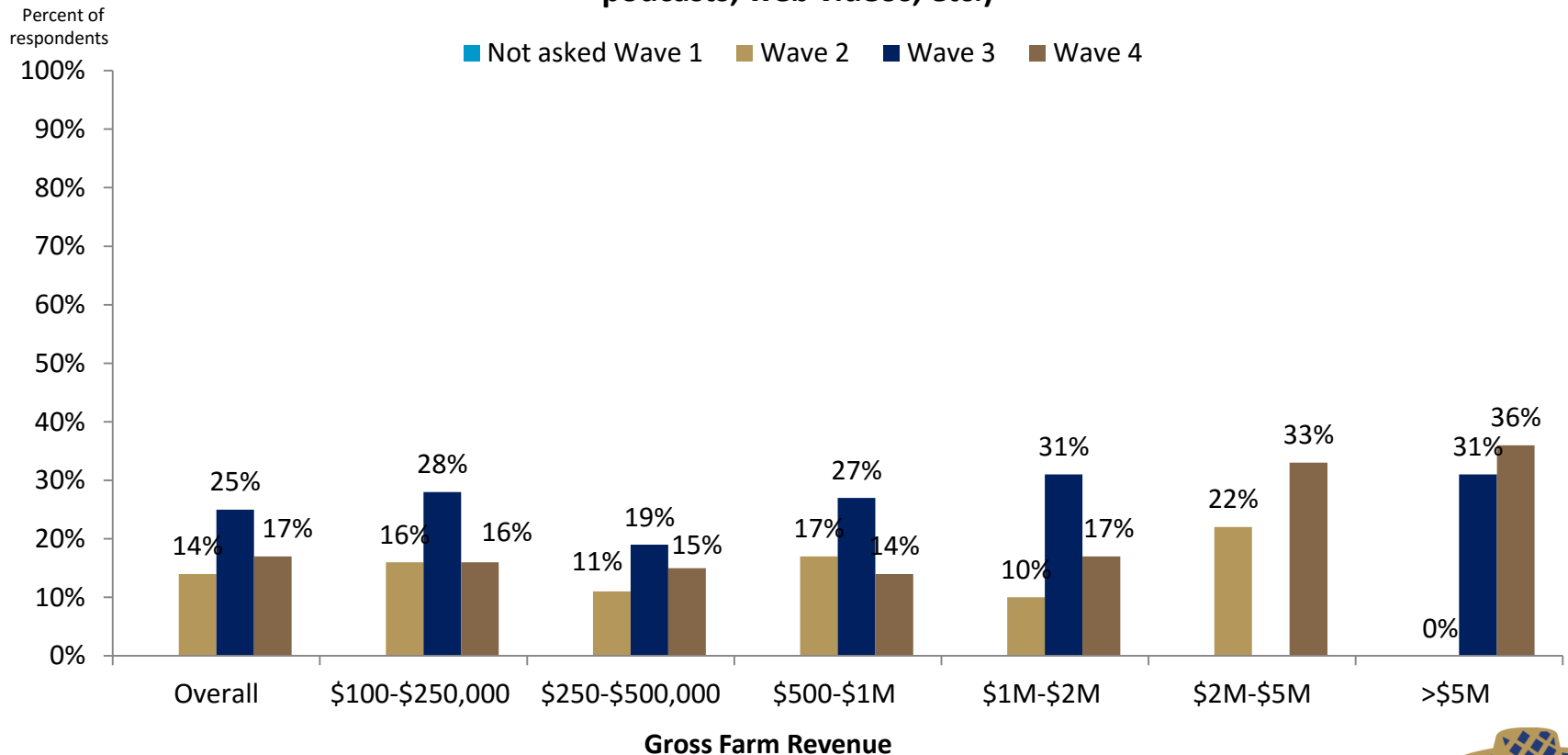




Radio is there all the time.

Farm Broadcasters Deliver Programming Beyond The Radio

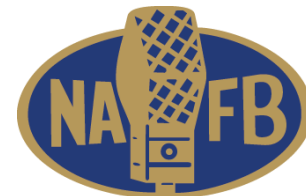
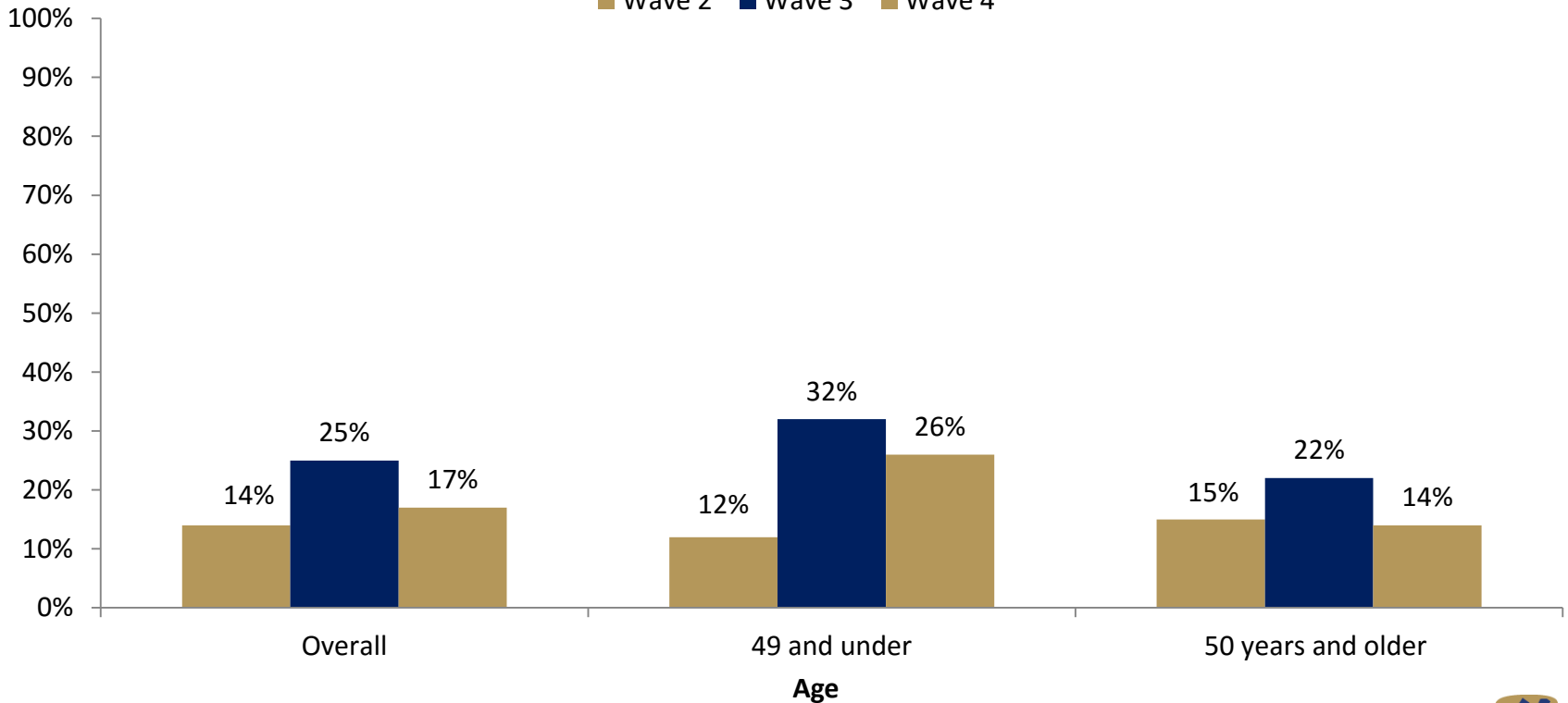
Do you listen to your farm broadcaster on a medium besides radio? (streaming, podcasts, web videos, etc.)



Farm Broadcasters Continue To Connect with Younger Producers

Do you listen to your farm broadcaster on a medium besides radio? (streaming, podcasts, web videos, etc.)

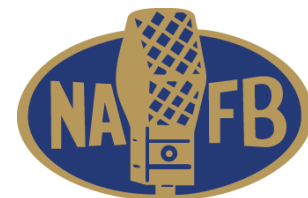
Percent of respondents





Farm Radio Listening Behavior

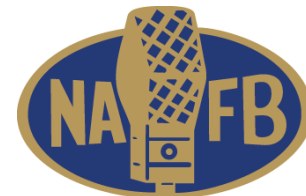
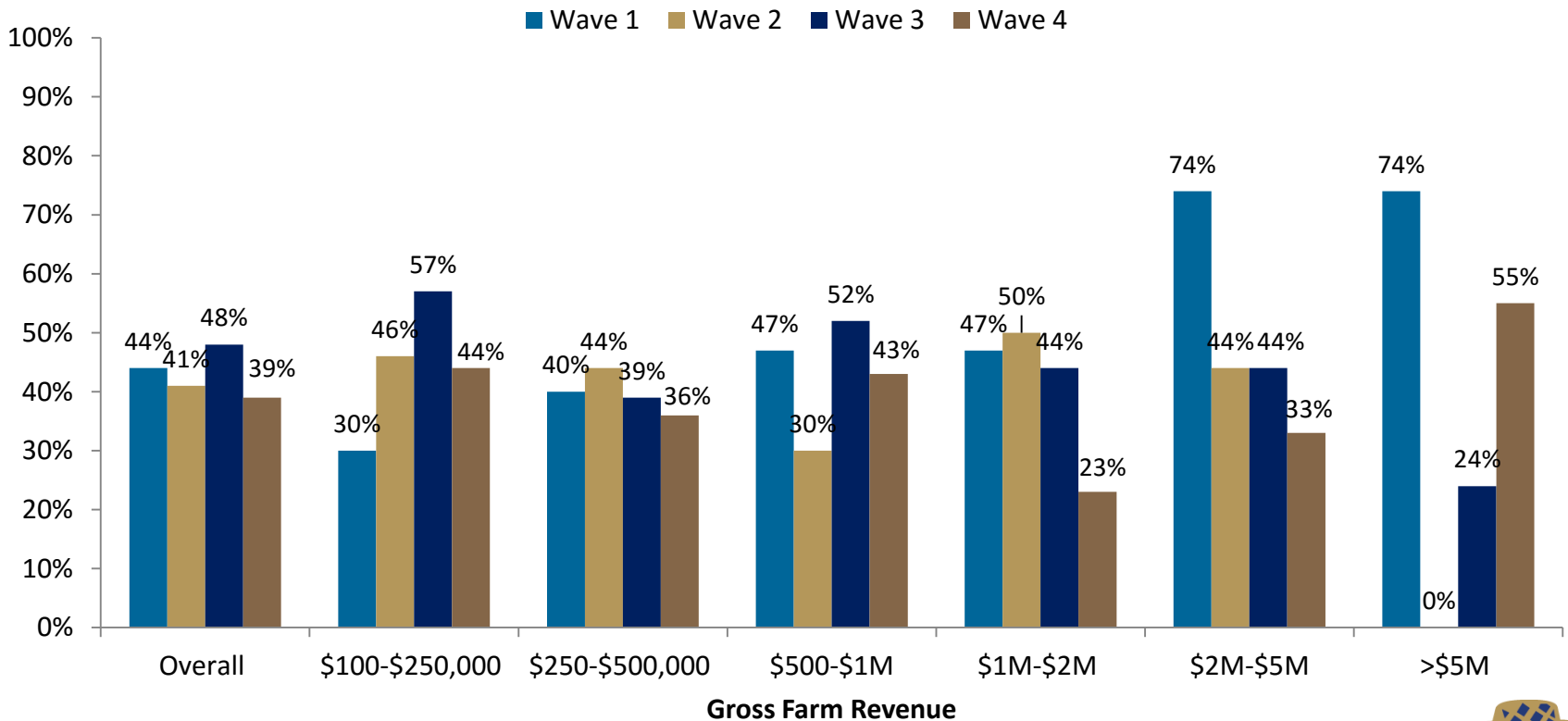
Farmers and farm partners can do so much while listening to farm radio. Late winter, farmers listen to radio while hauling grain to the elevator, grabbing lunch, feeding cattle, driving to an industry event. Where they listen changes as the calendar changes, but radio habits stay consistent. Radio goes where they go.



Saturday Programming Reaches Farmers

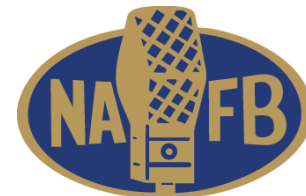
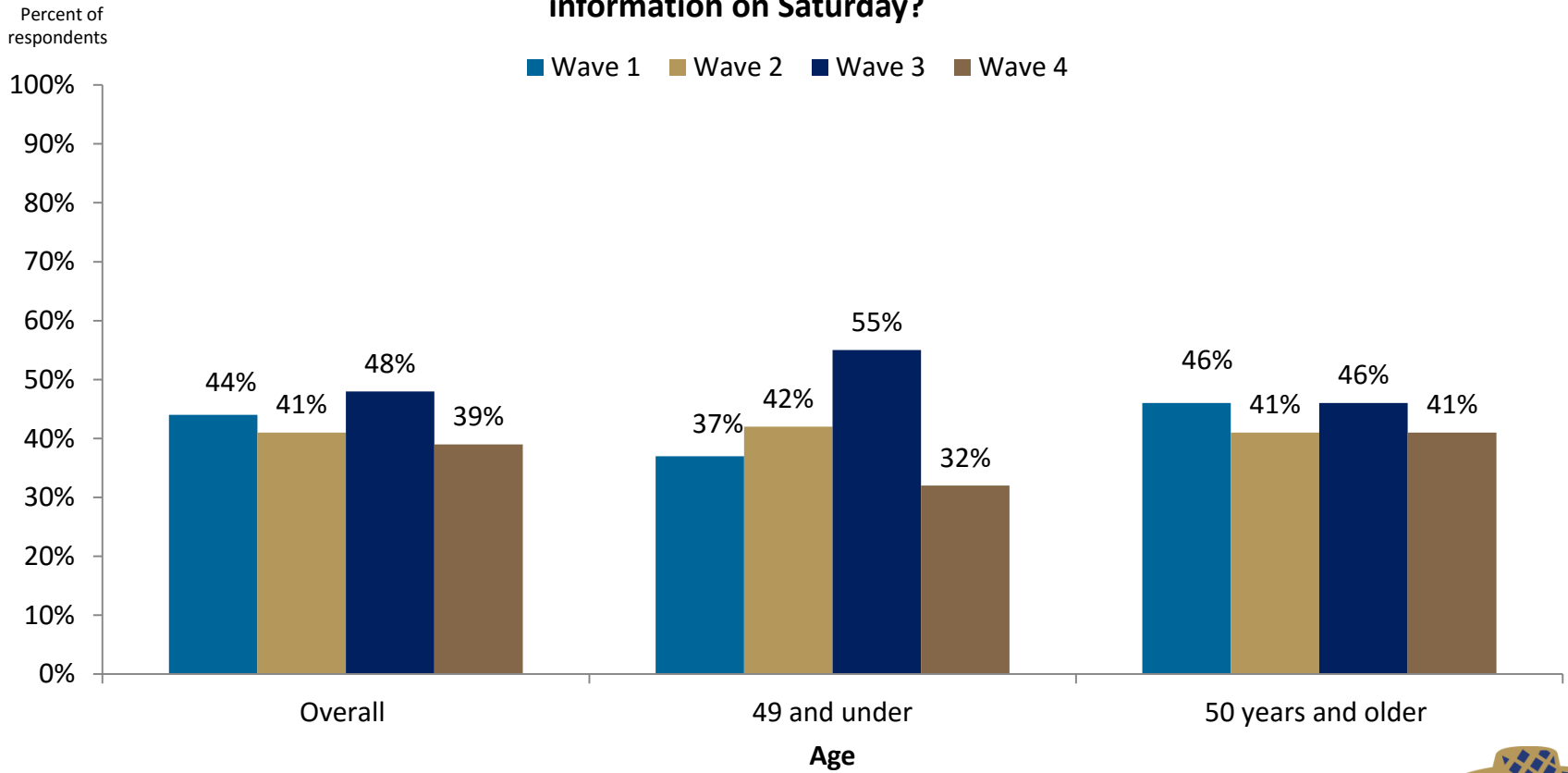
During this time of year, do you listen to farm news, weather, markets and ag information on Saturday?

Percent of respondents



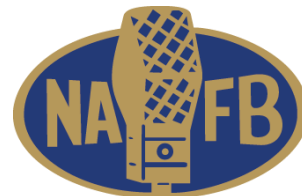
Saturday Listenership Is Strong

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



Key Learnings On Saturday

- Saturday listeners listen on average 27.5 minutes per day Monday- Friday, and also listen on Saturday.
- Saturday minutes are strong.
- Heavy weekday listeners, listen the same amount of time on Saturday.
- On average, farmers who listen on weekends, and weekdays tend to listen 81 percent as much on Saturday as they do during the week.

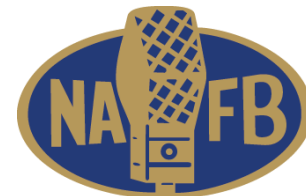
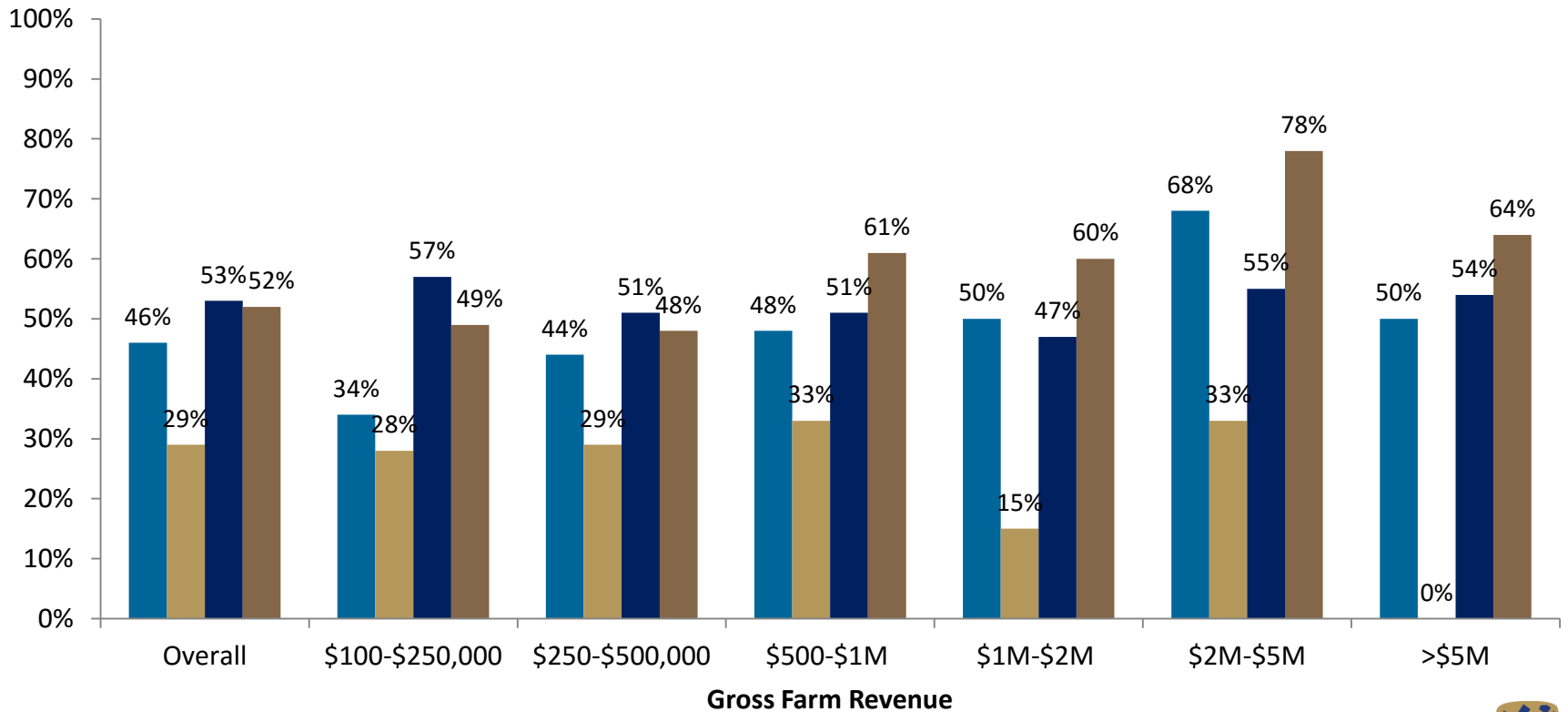


Saturday Sports Listening By Waves

Percent of respondents

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

■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4

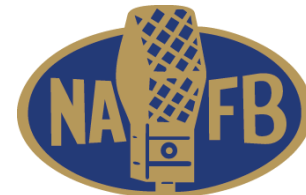
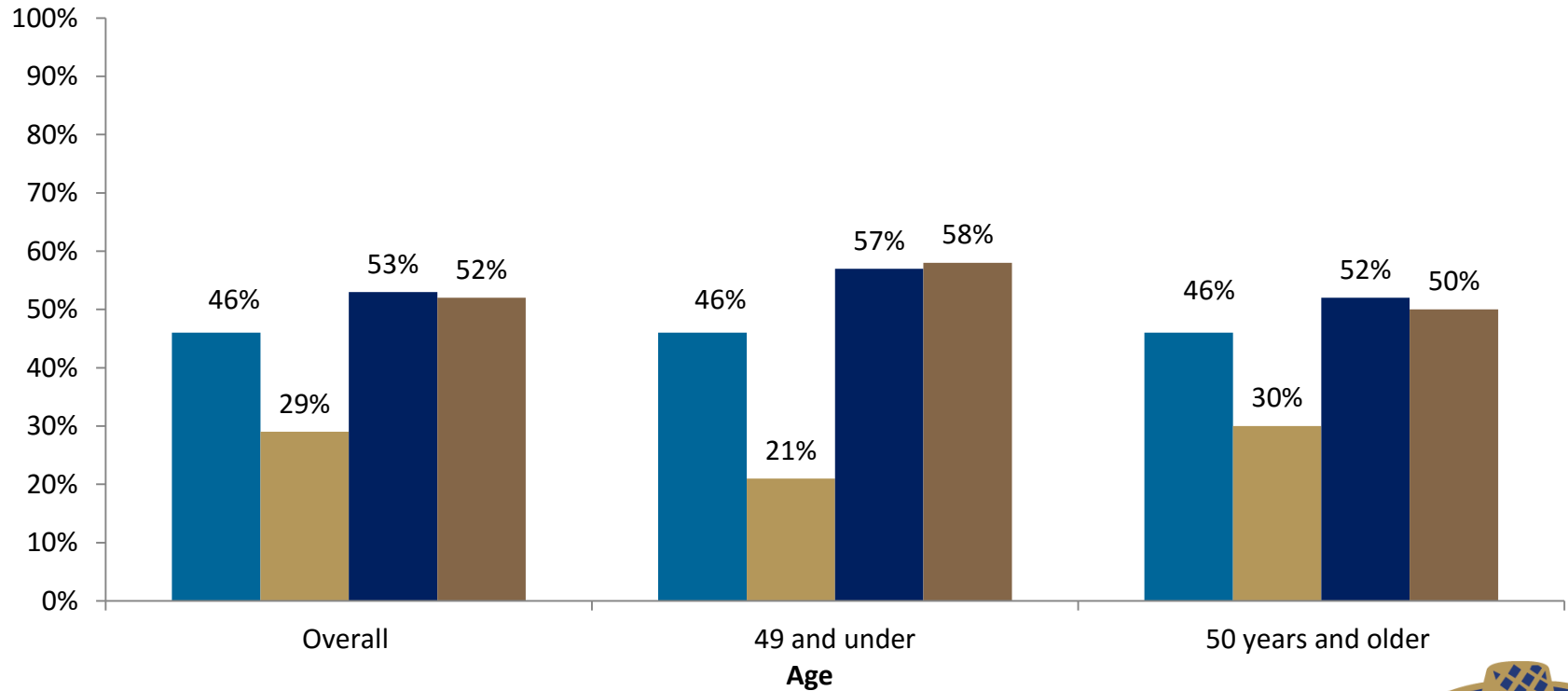


Saturday Sports Listenership Is Popular Among Both Young And Older Farmers

During this time of year, do you listen to sports on Saturdays?

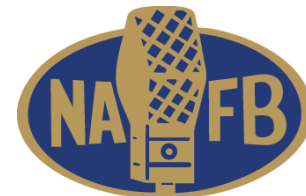
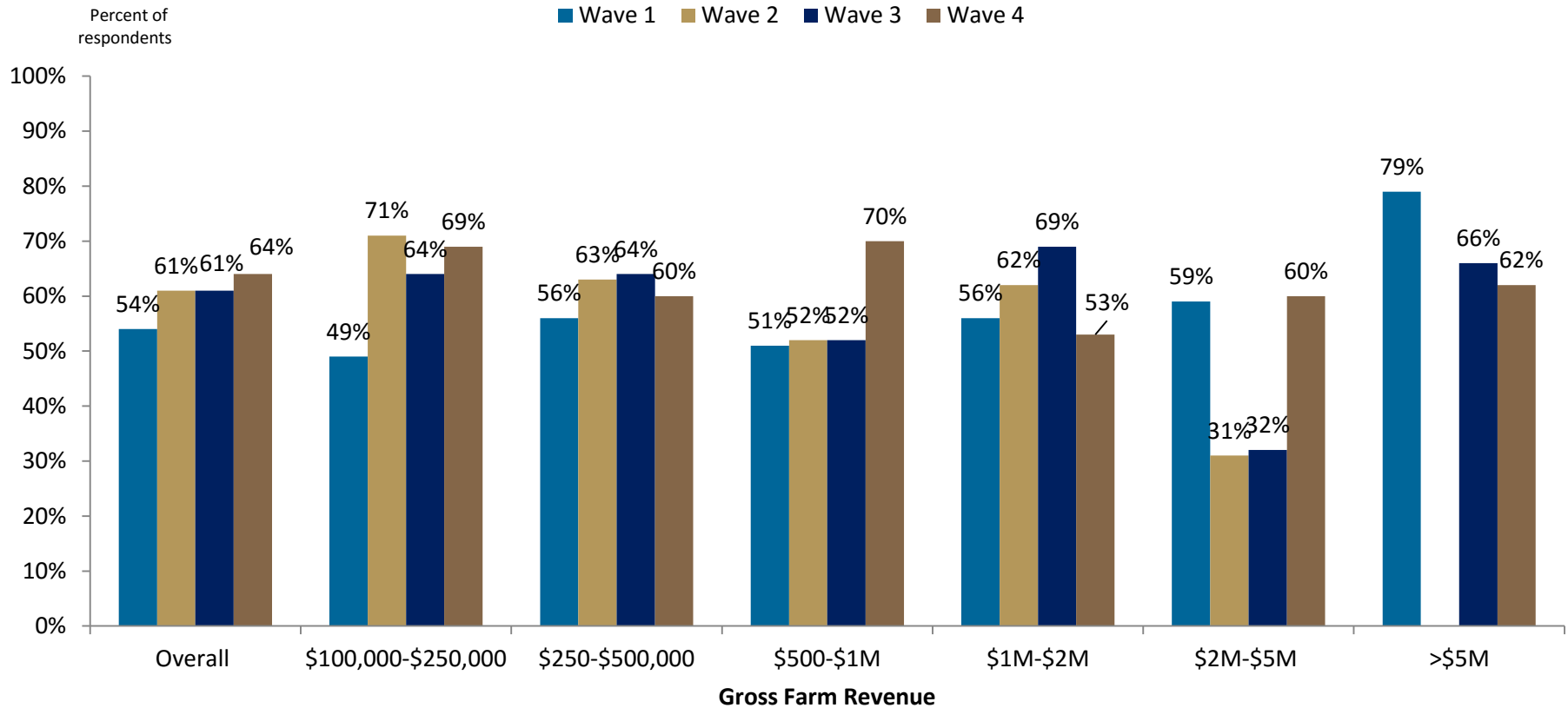
Percent of respondents

■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4

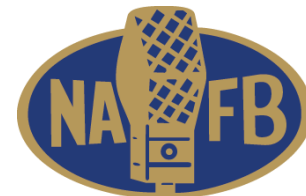
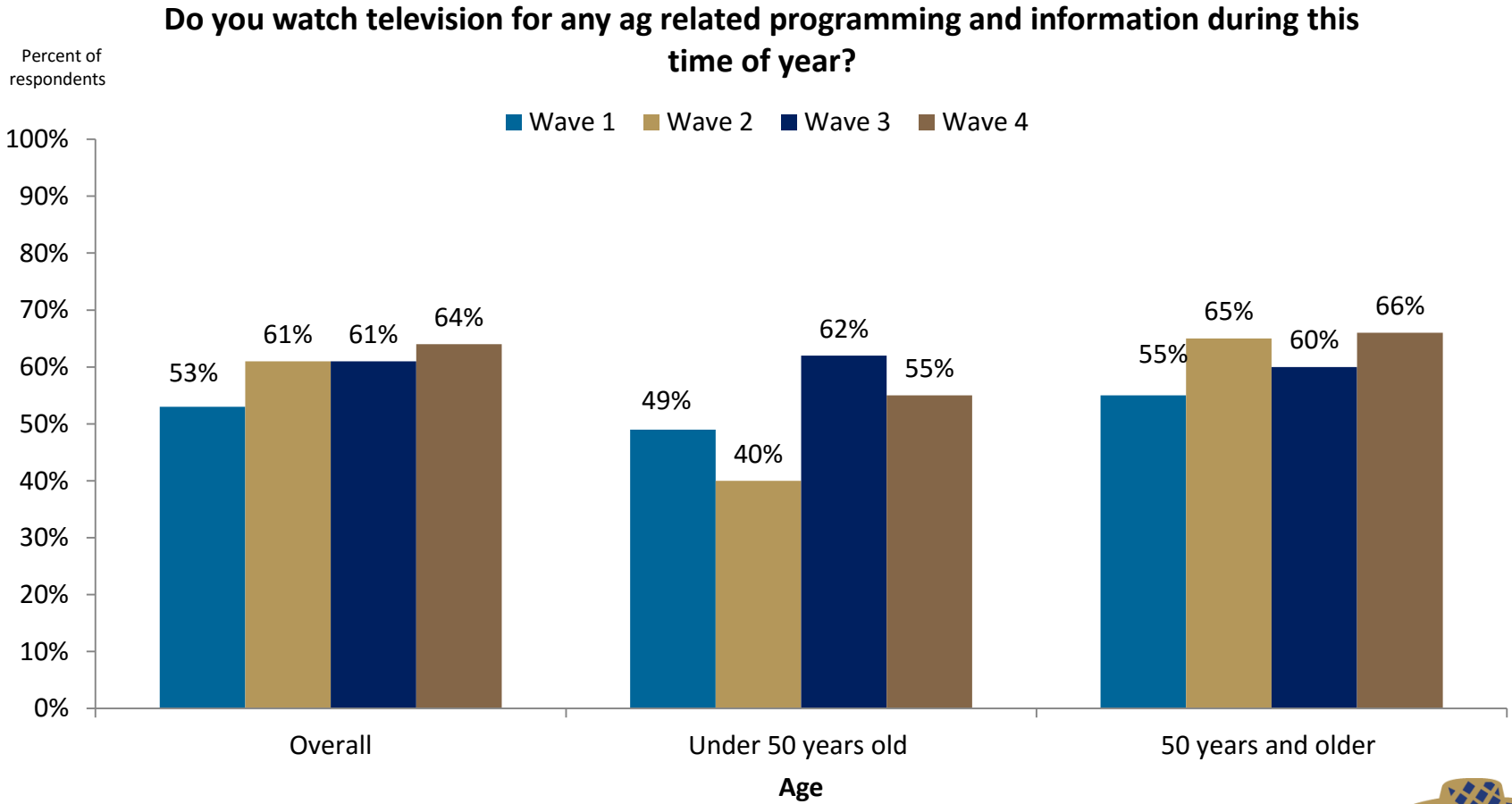


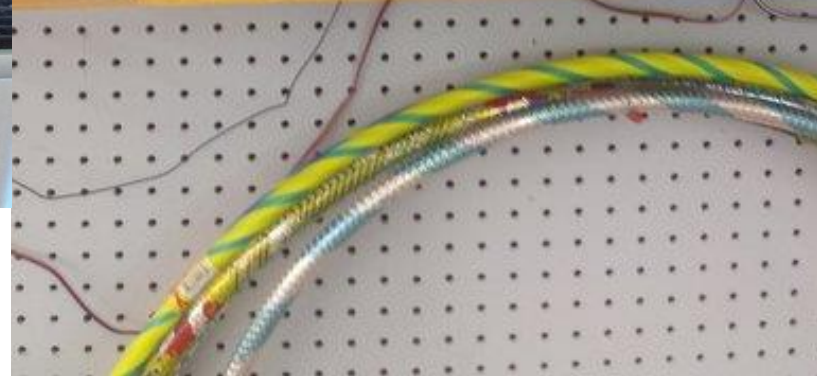
60% Of Farmers Watch TV Ag

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



Farmers Of All Ages Watch Ag TV

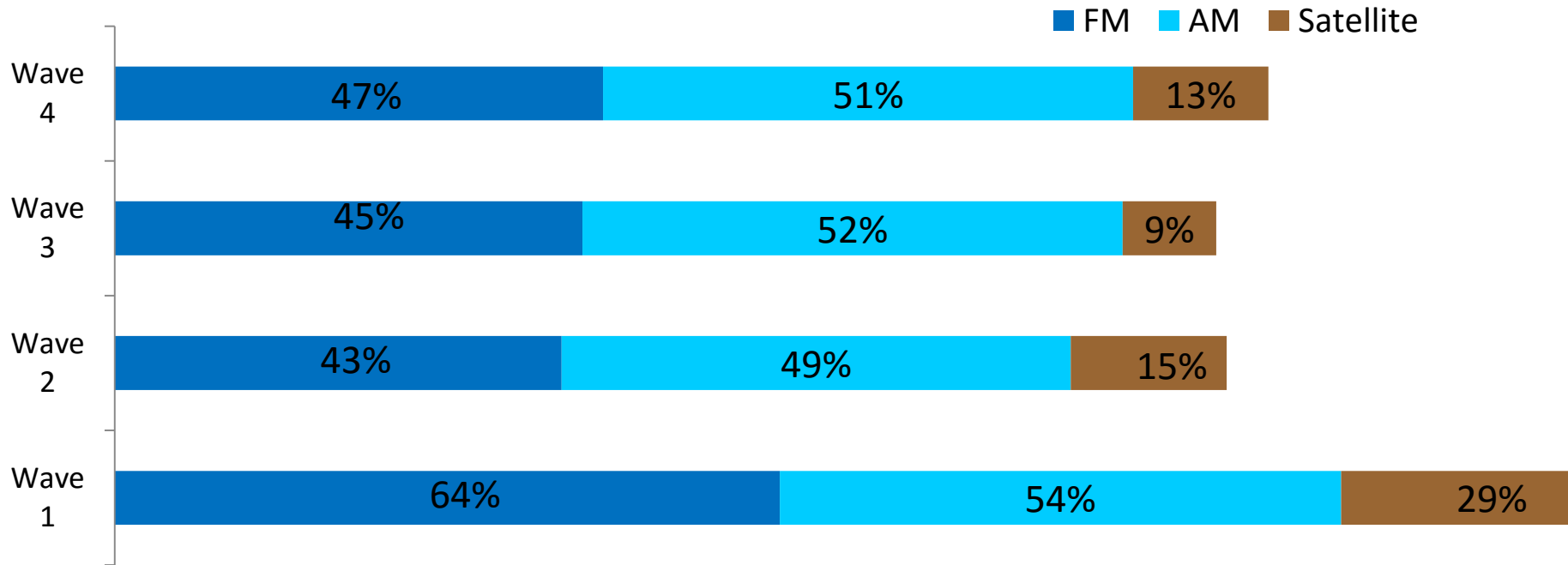




Radio Band Listenership

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

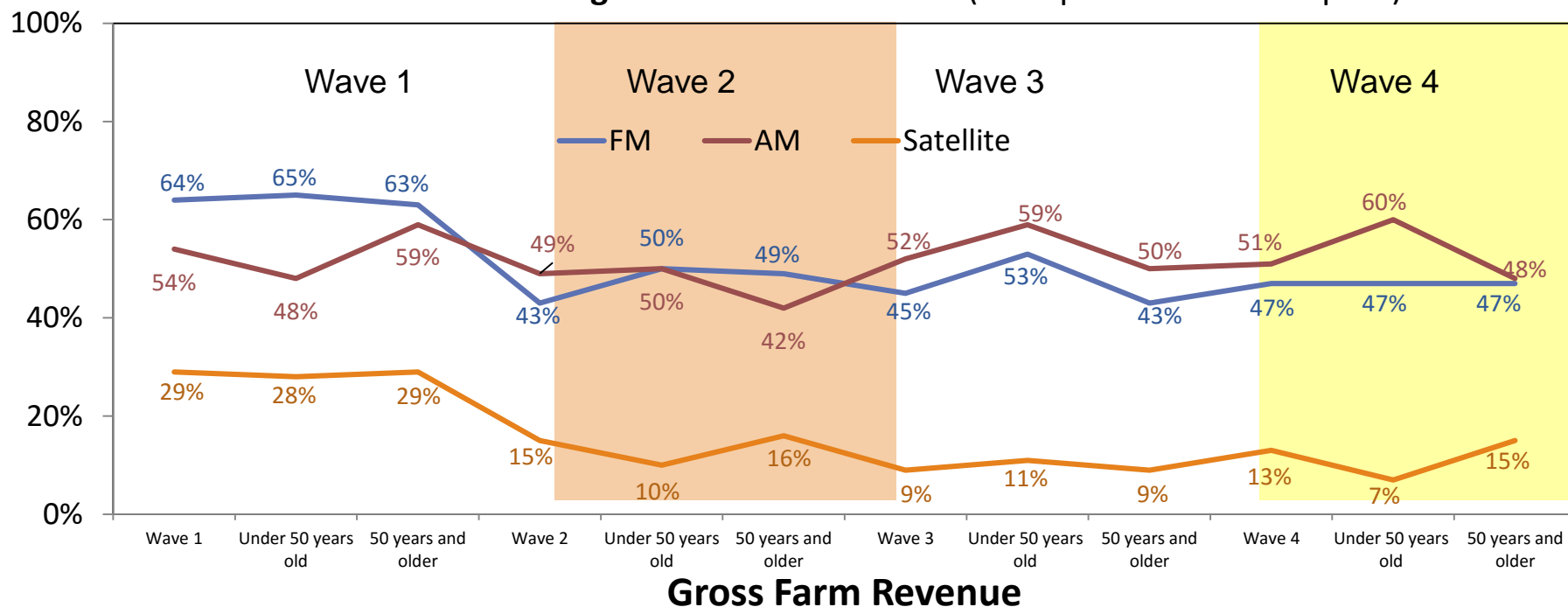
Wave 1 did not specify farm news, weather and markets.



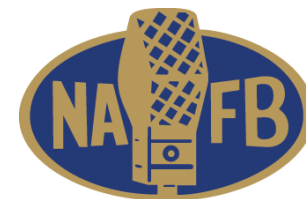
Radio Reaches Farmers and Ranchers

Percent of respondents

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



Wave 1 did not specify farm news, weather and markets.



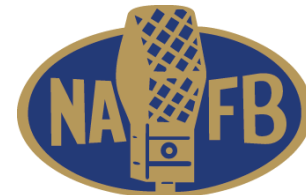
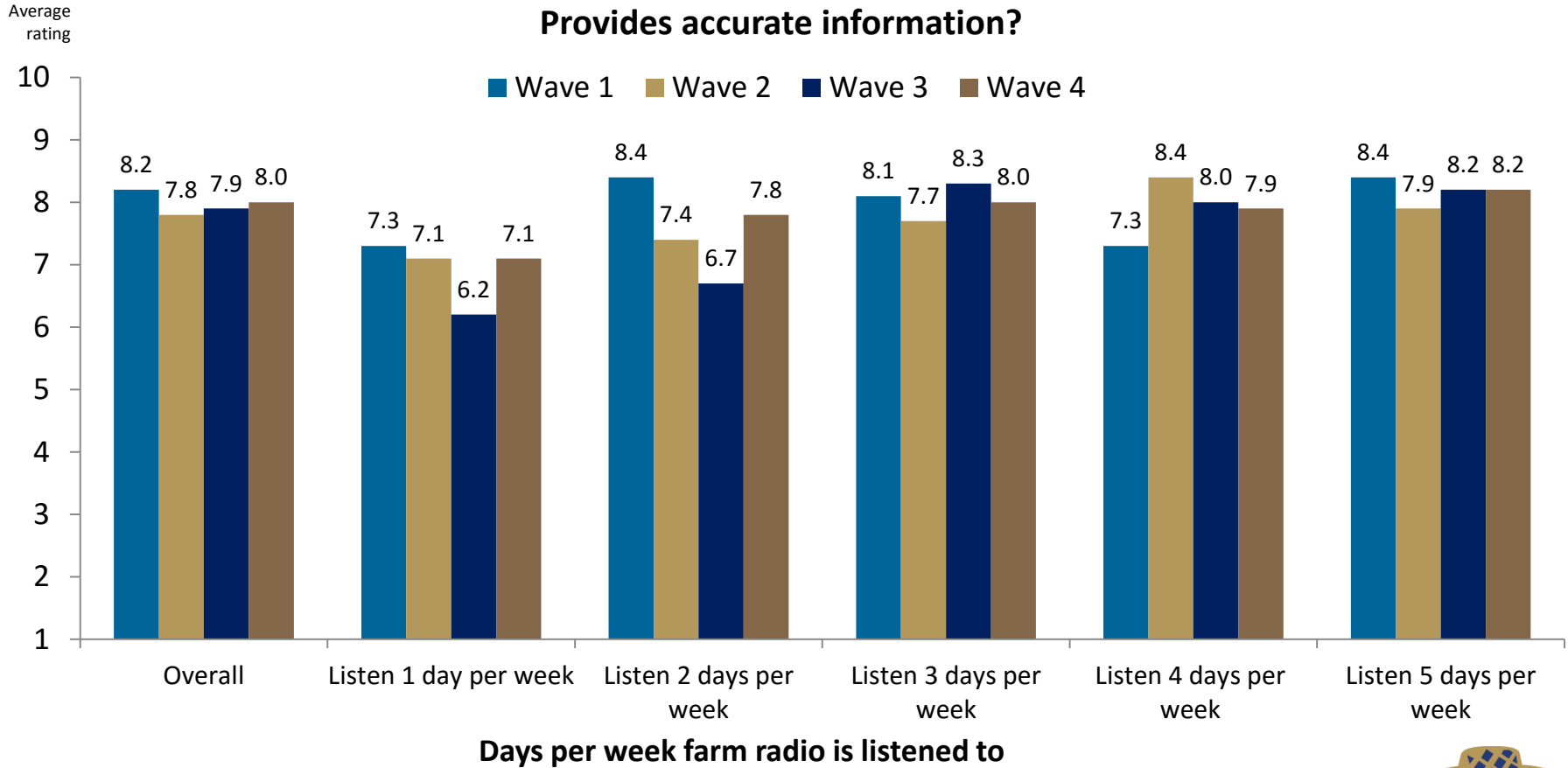
How Are Farm Broadcaster Regarded By Their Listeners

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



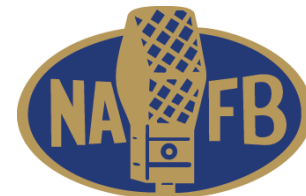
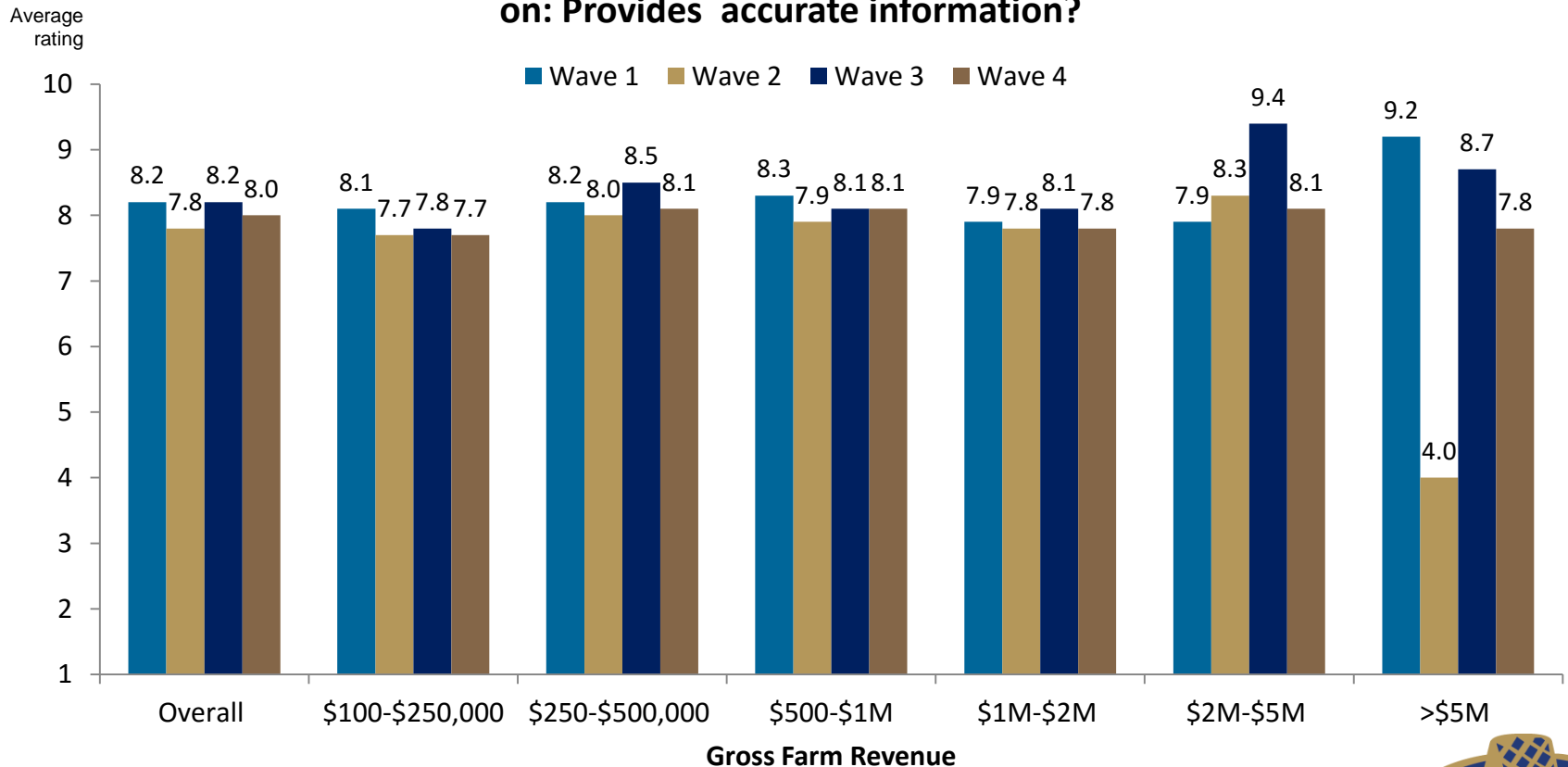
Frequent Listeners Rate Their Broadcaster Higher Than Those Who Listen Less Often

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



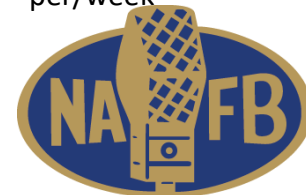
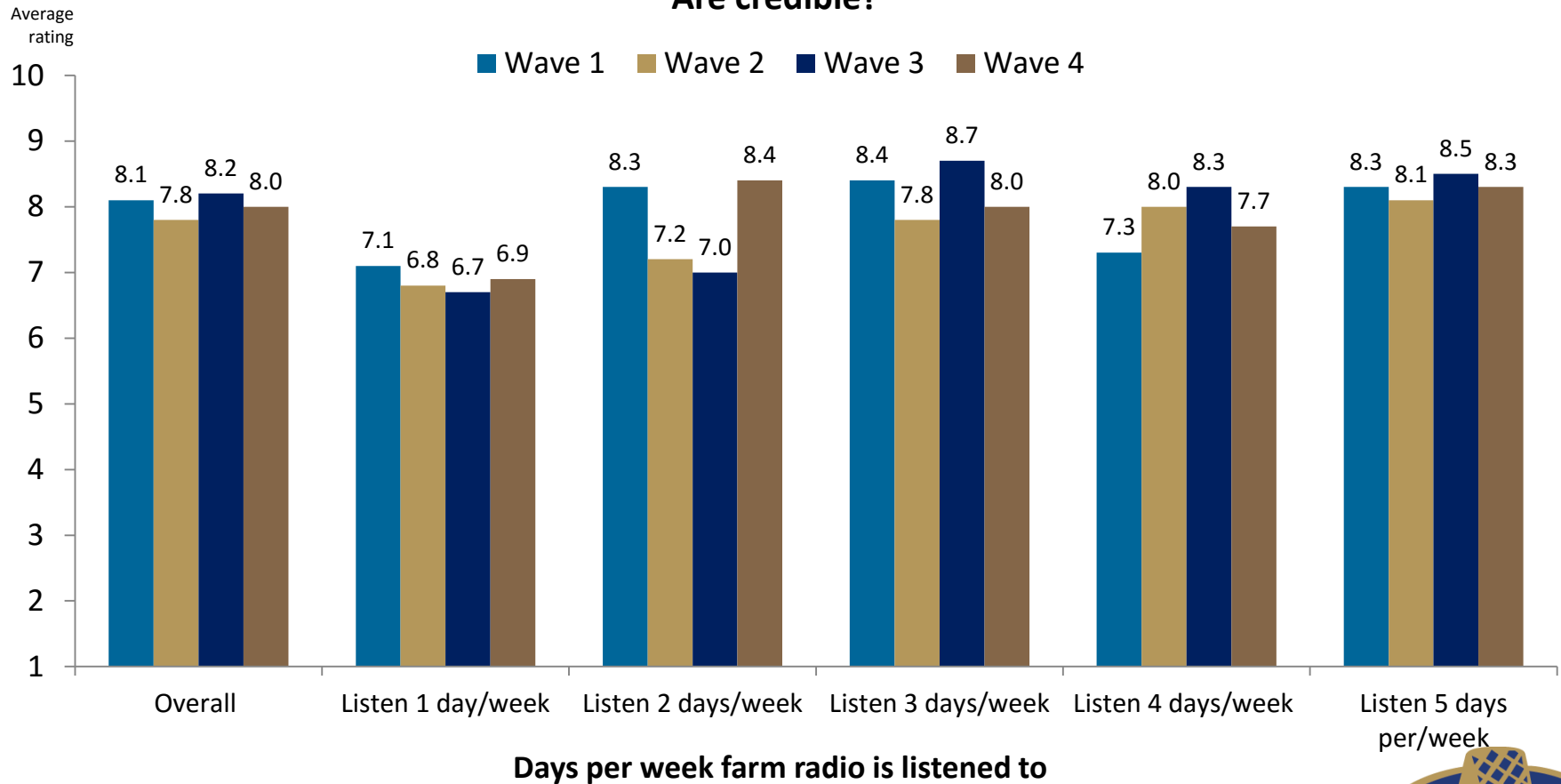
Broadcaster Accuracy Is Rated Consistently High Regardless Of Farm Revenue

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



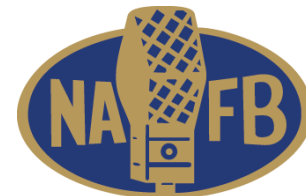
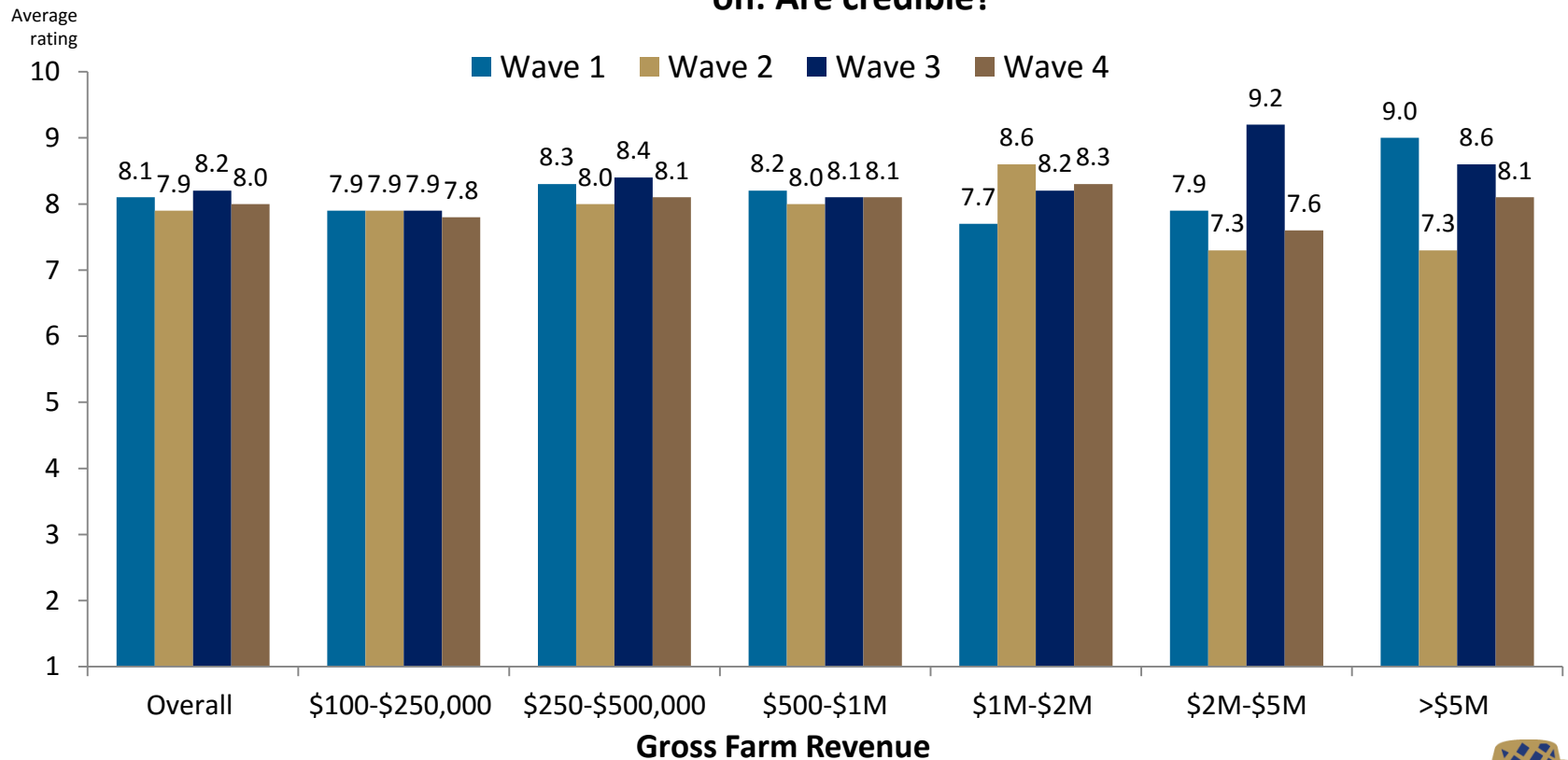
Frequent Listeners Rate Their Broadcast Higher on Credibility

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



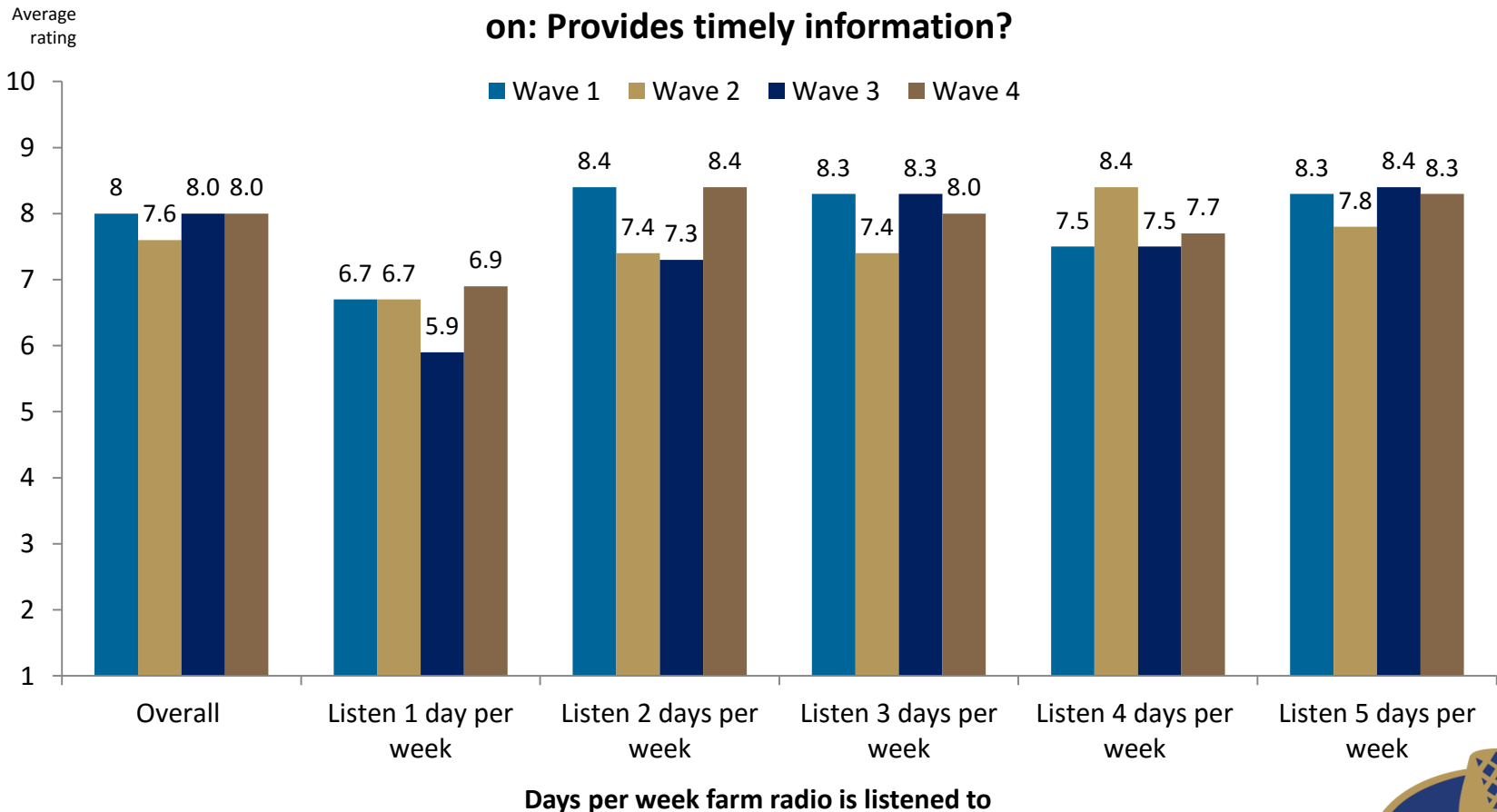
Farmers Consistently Rate Farm Broadcaster High On Credibility

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



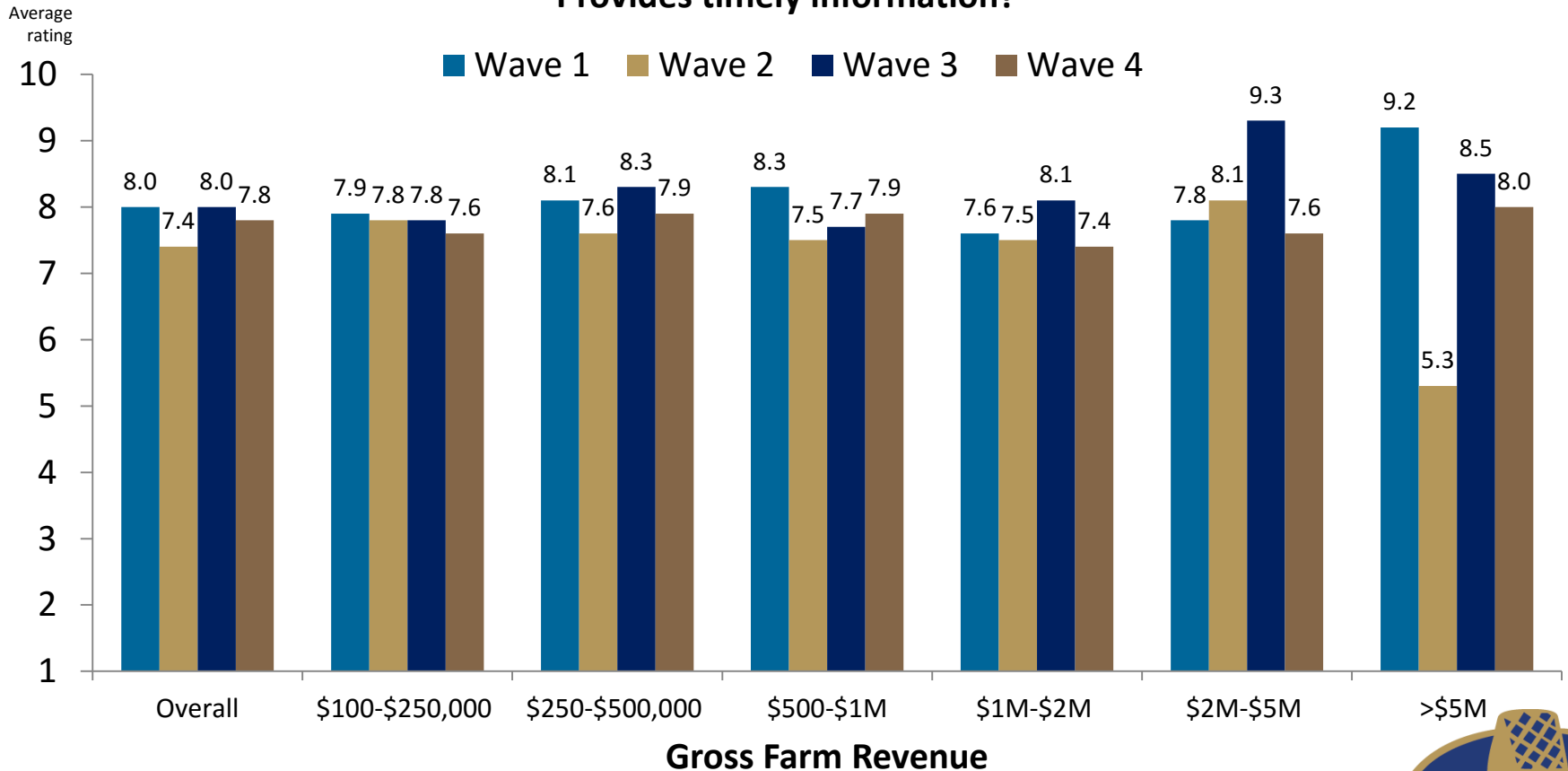
More Frequent Listeners Rate Their Broadcaster Higher On Timely Information

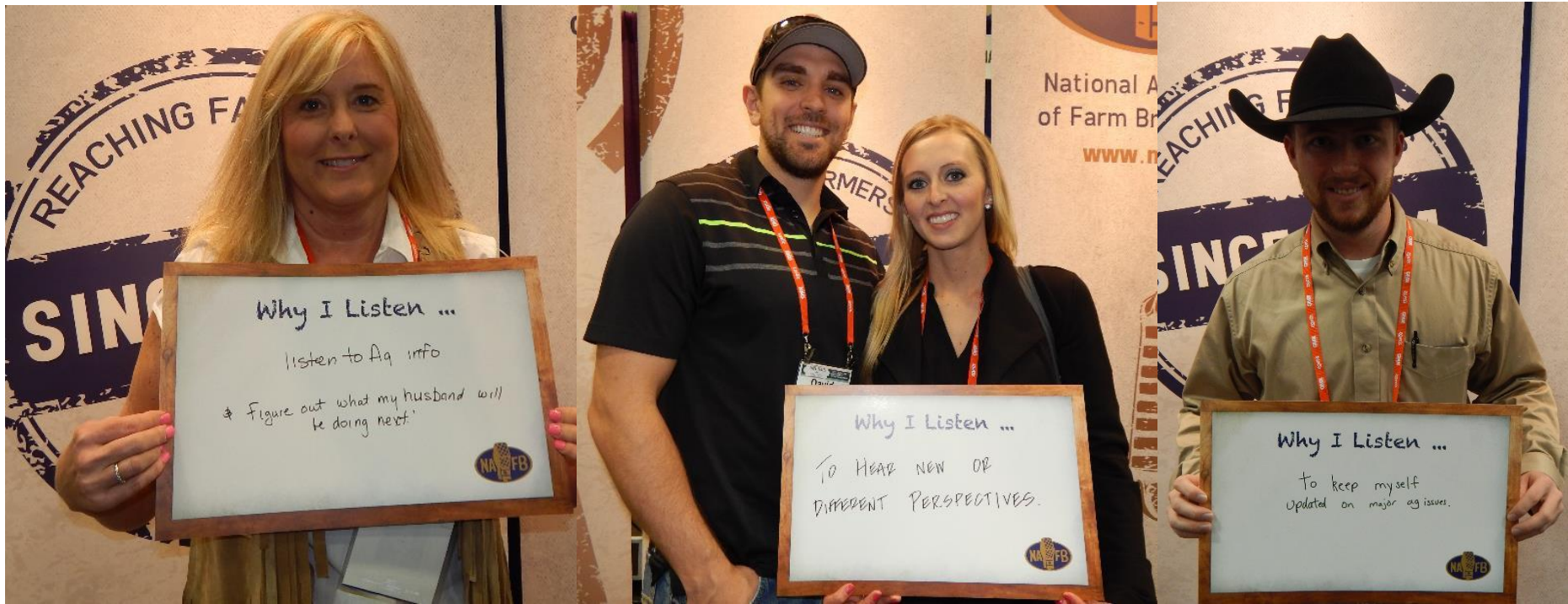
Please rate your farm broadcaster on a scale of 1 to 10, where 10 is excellent on: Provides timely information?



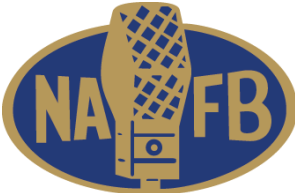
Listeners Rate Their Broadcasters On Providing Timely Information

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

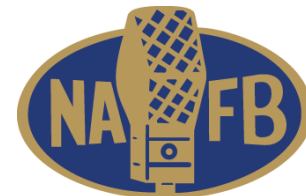
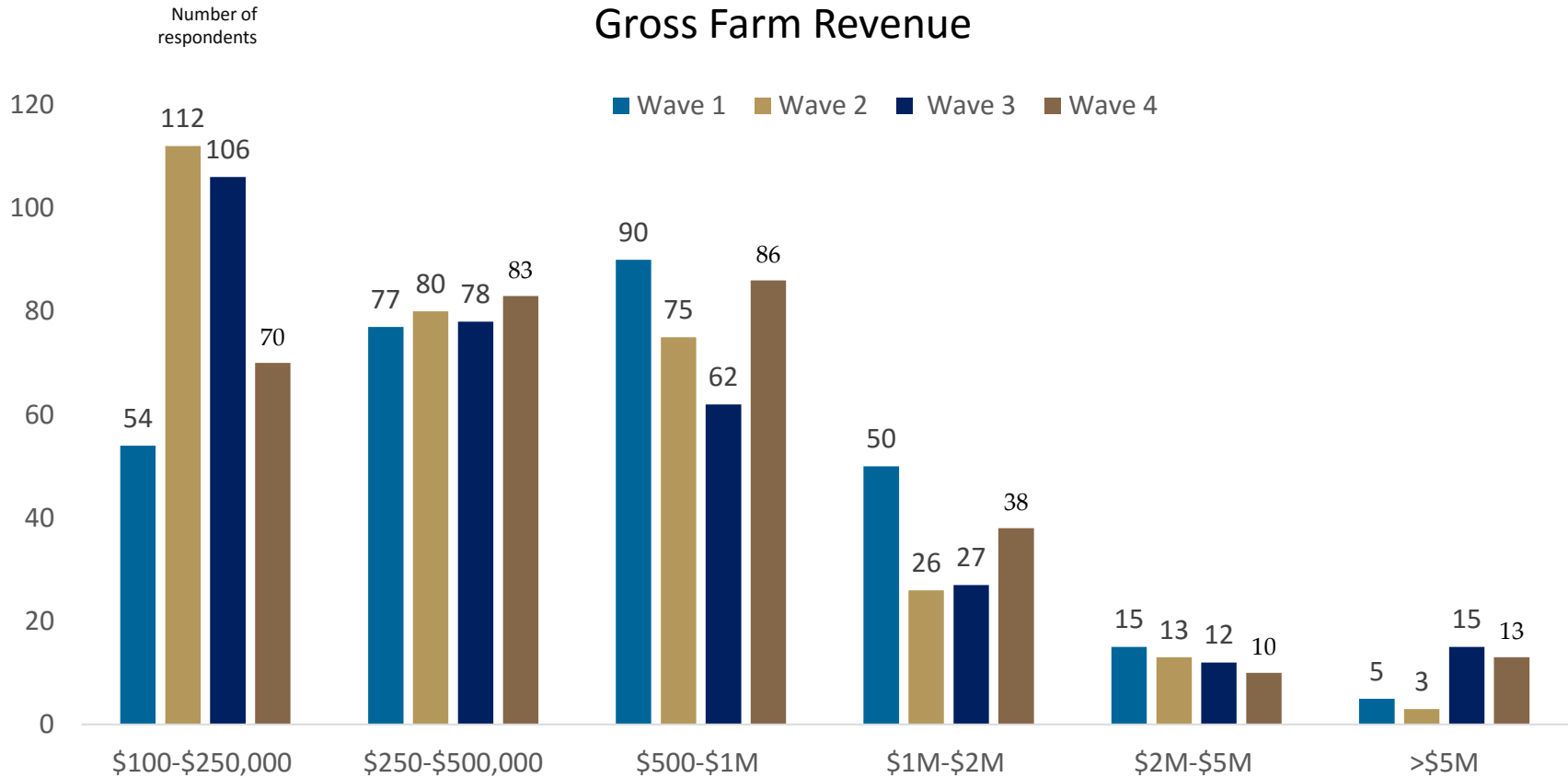




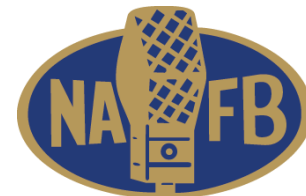
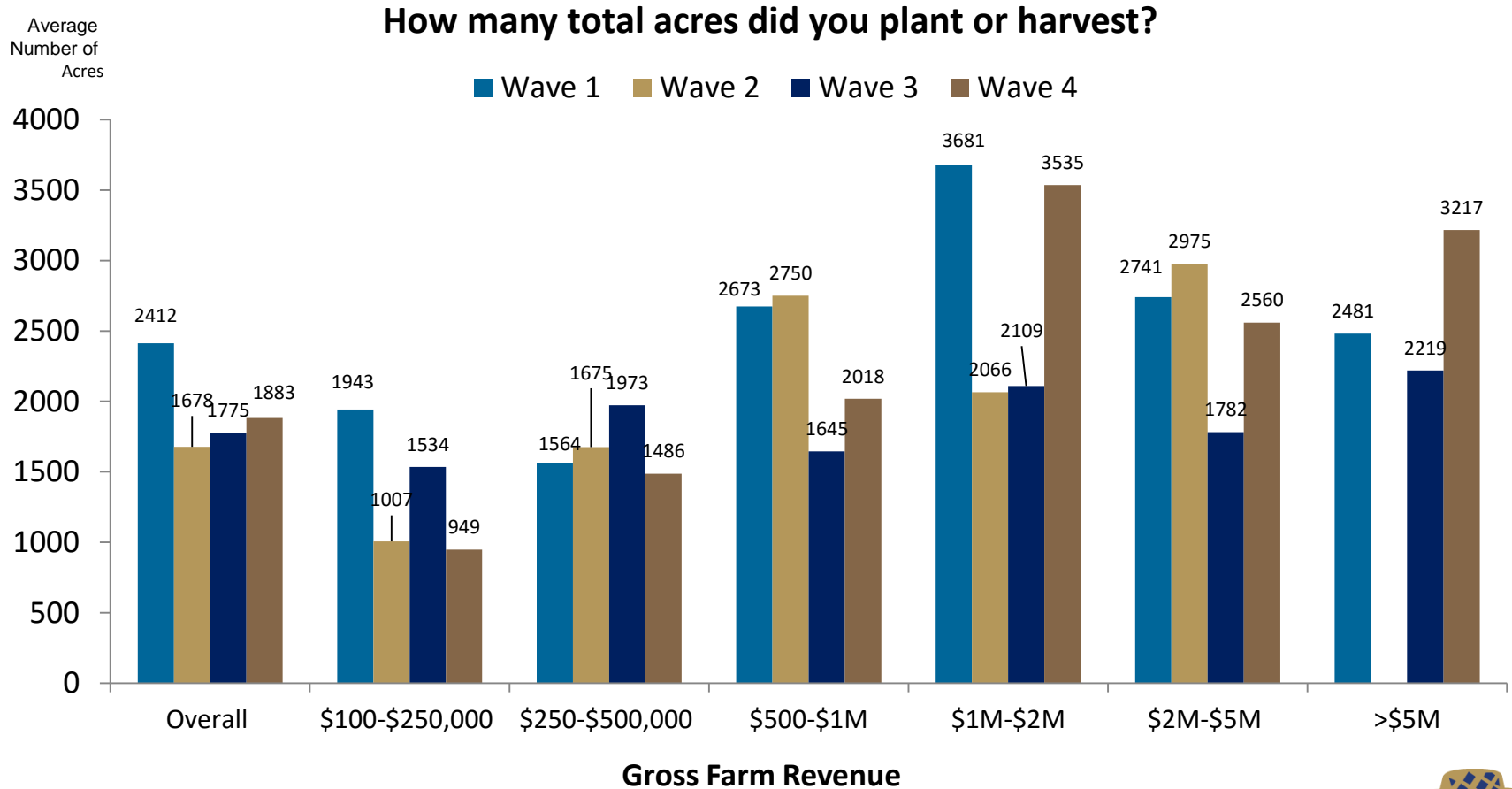
Respondent Demos



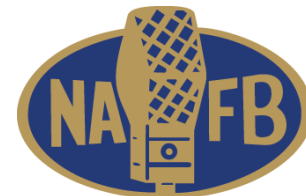
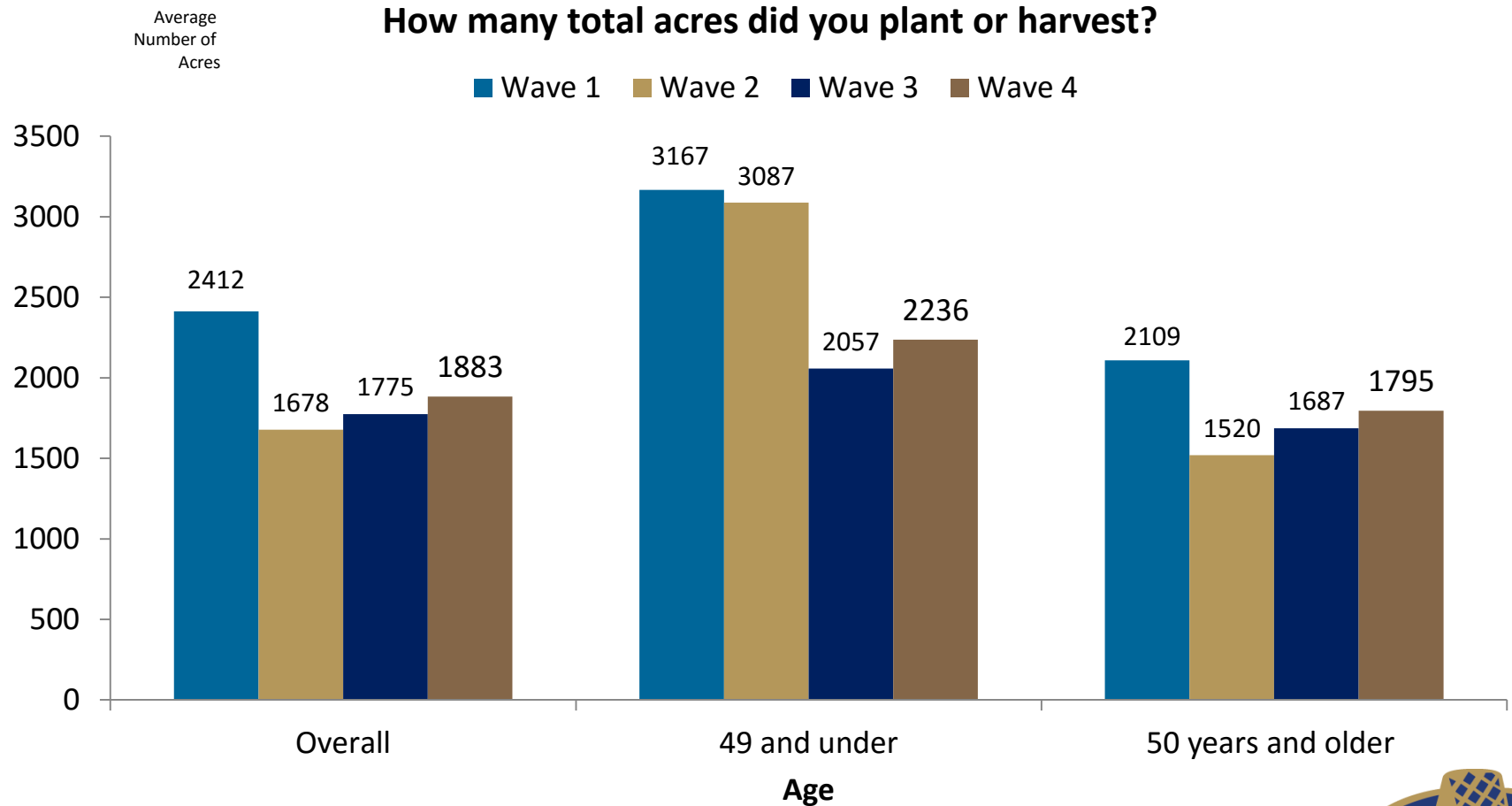
Gross Farm Revenue By Data Collection Wave



On Average, Respondents Farm Almost 1,900 Acres



Younger Growers Tend To Control More Acres

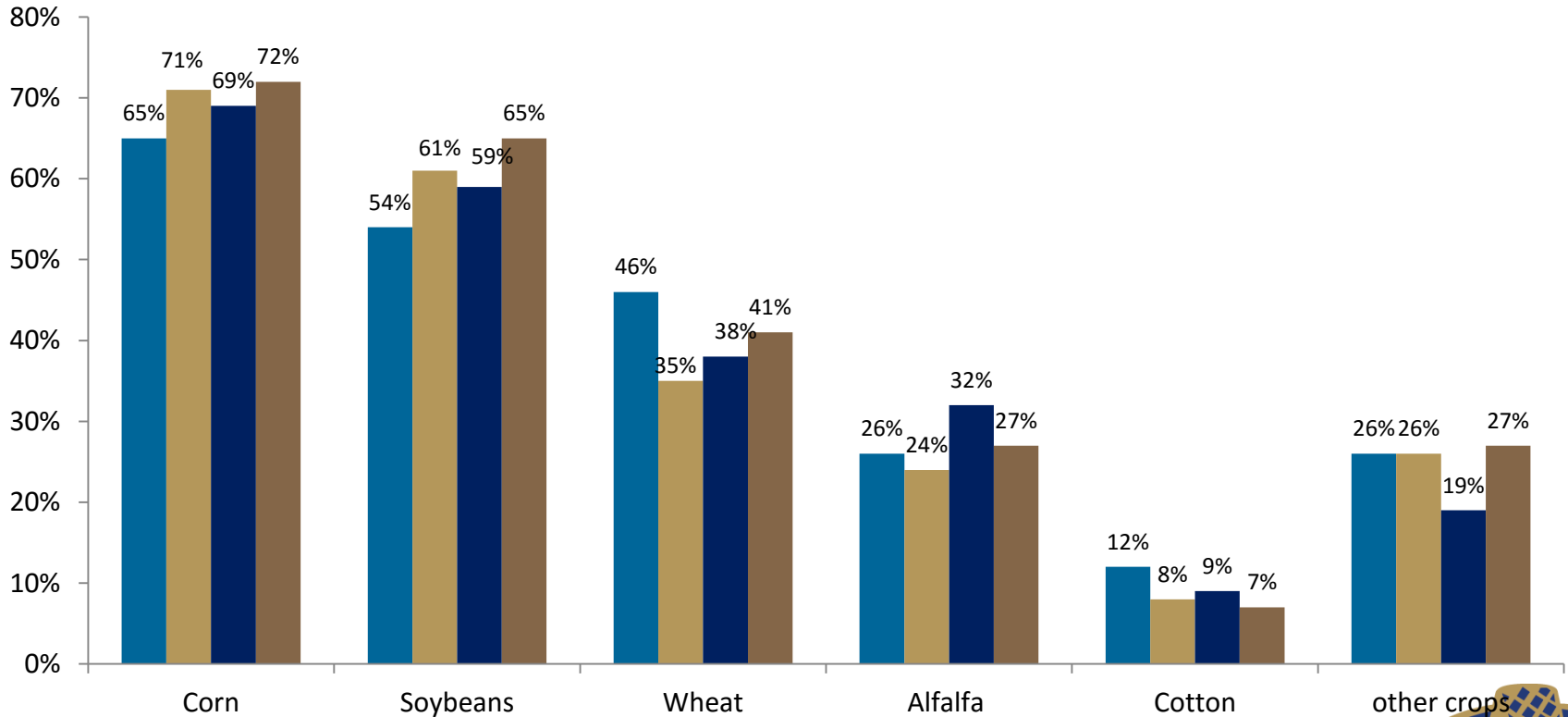


Corn Is The Most Frequently Planted Crop By Respondents

Percent of respondents

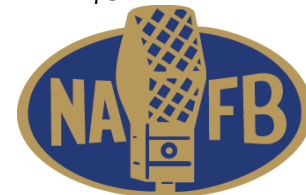
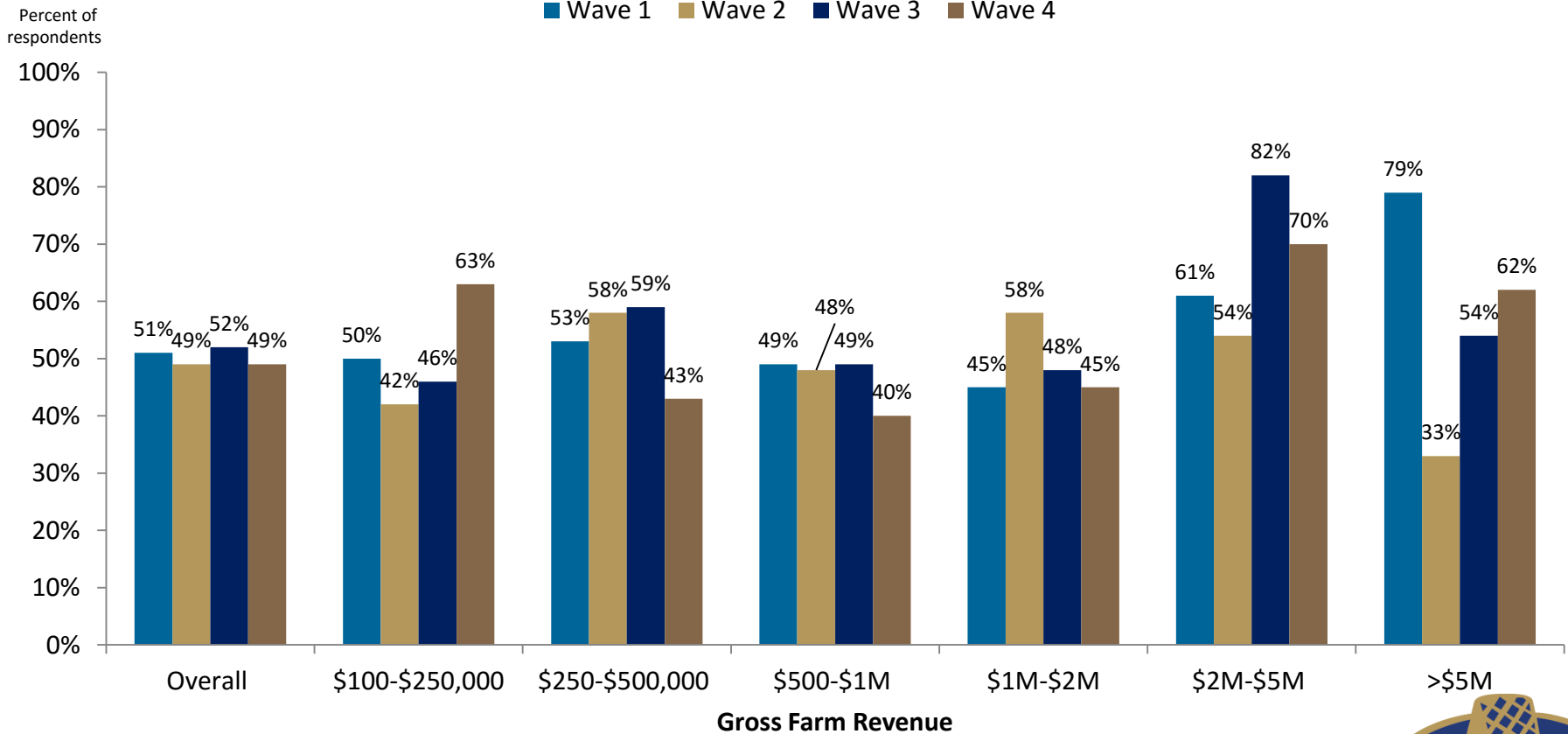
Crops planted

■ Wave 1 ■ Wave 2 ■ Wave 3 ■ Wave 4



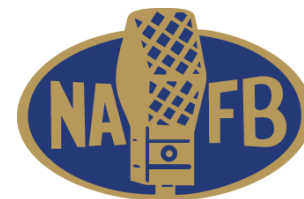
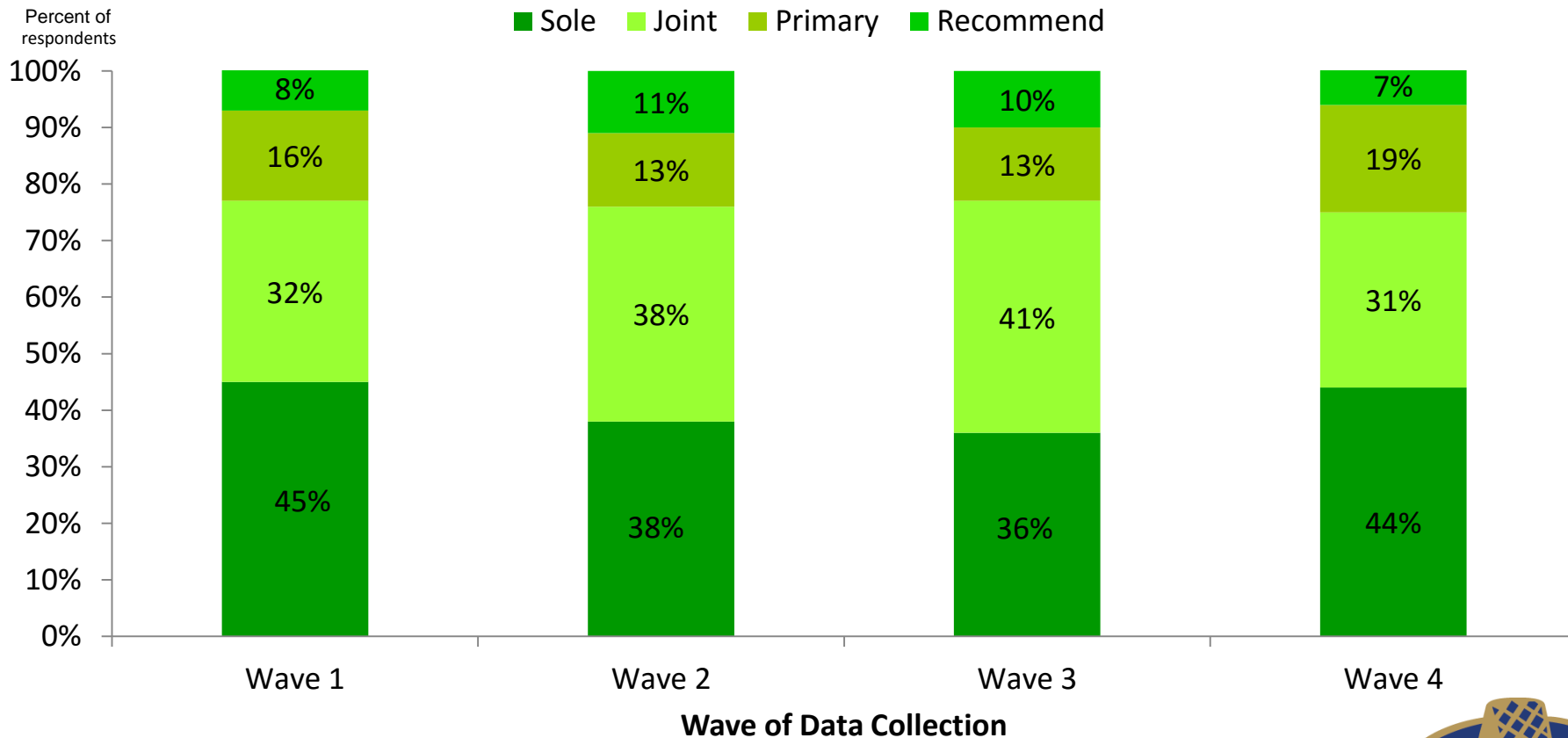
Half Of Respondents Have Livestock Or Dairy Operations

Do you have any dairy or livestock in your operation?



9 Out Of 10 Farmers Surveyed Are Decision Makers

What is your decision making role?



Thank You.



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