
AG RETAIL MARKET MEDIA USE SURVEY RESULTS

June 16, 2020



METHODOLOGY

- Three eBlast were sent to a targeted list of ag retailers and independent crop consultants
 - List size: 19,470
 - One winner was selected at random to receive a \$125 gift card
- Analysis was conducted on a final dataset including 324 survey responses.
- The margin of error is +/- 5.4% at a confidence level of 95%.



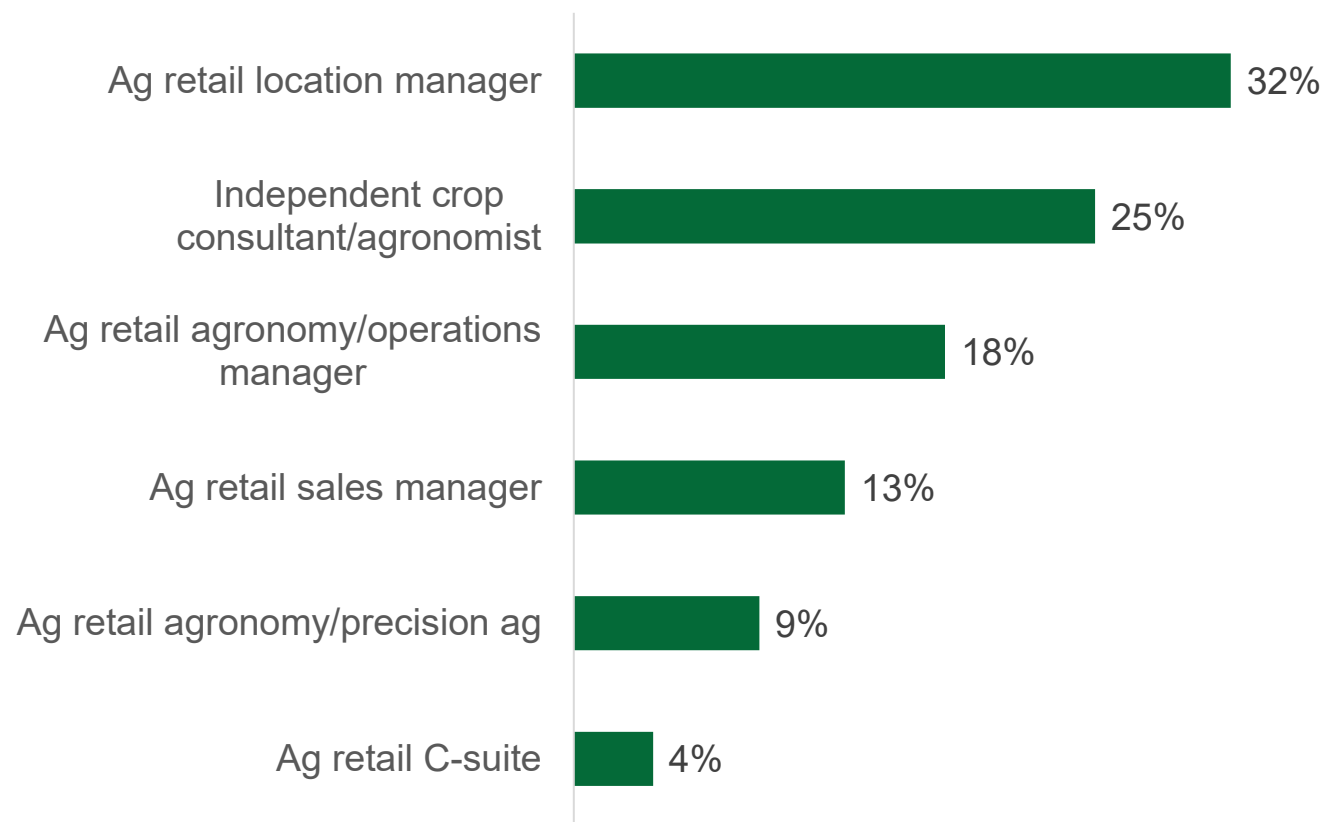
MEDIA CHANNELS STUDIED

- Agricultural podcasts
- Farm shows or agricultural retail conferences
- Agricultural webinars
- Agricultural supplier publications
- Agricultural magazines
- Agricultural TV programs
- Agricultural direct mail
- Agricultural radio programs
- Agricultural apps in a mobile device
- Agricultural websites on a desktop
- Agricultural websites on a mobile device
- Agricultural text messages
- Agricultural social media
- Agricultural direct email
- Agricultural e-newsletters



PARTICIPANT ROLE IN THE INDUSTRY

Respondents by Industry Role

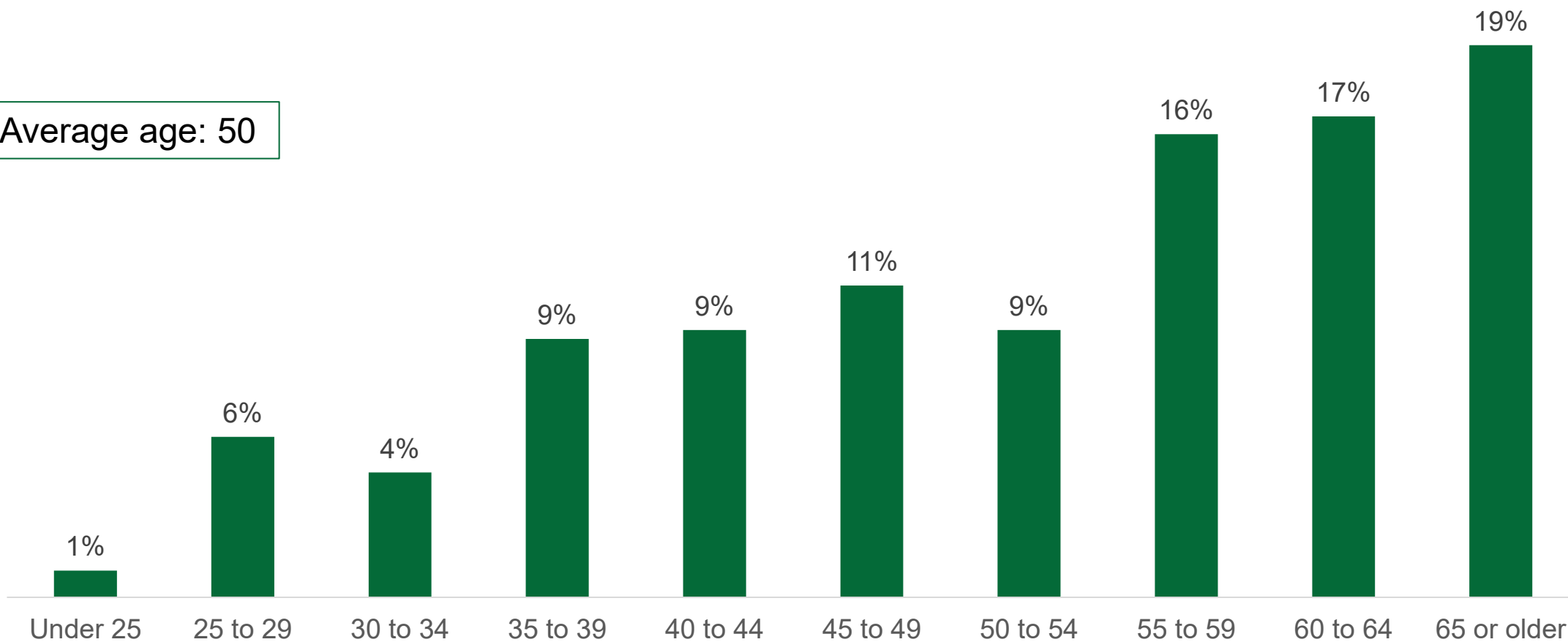


Q2 Which one of these best describes your current position?



PARTICIPANT AGE

Average age: 50

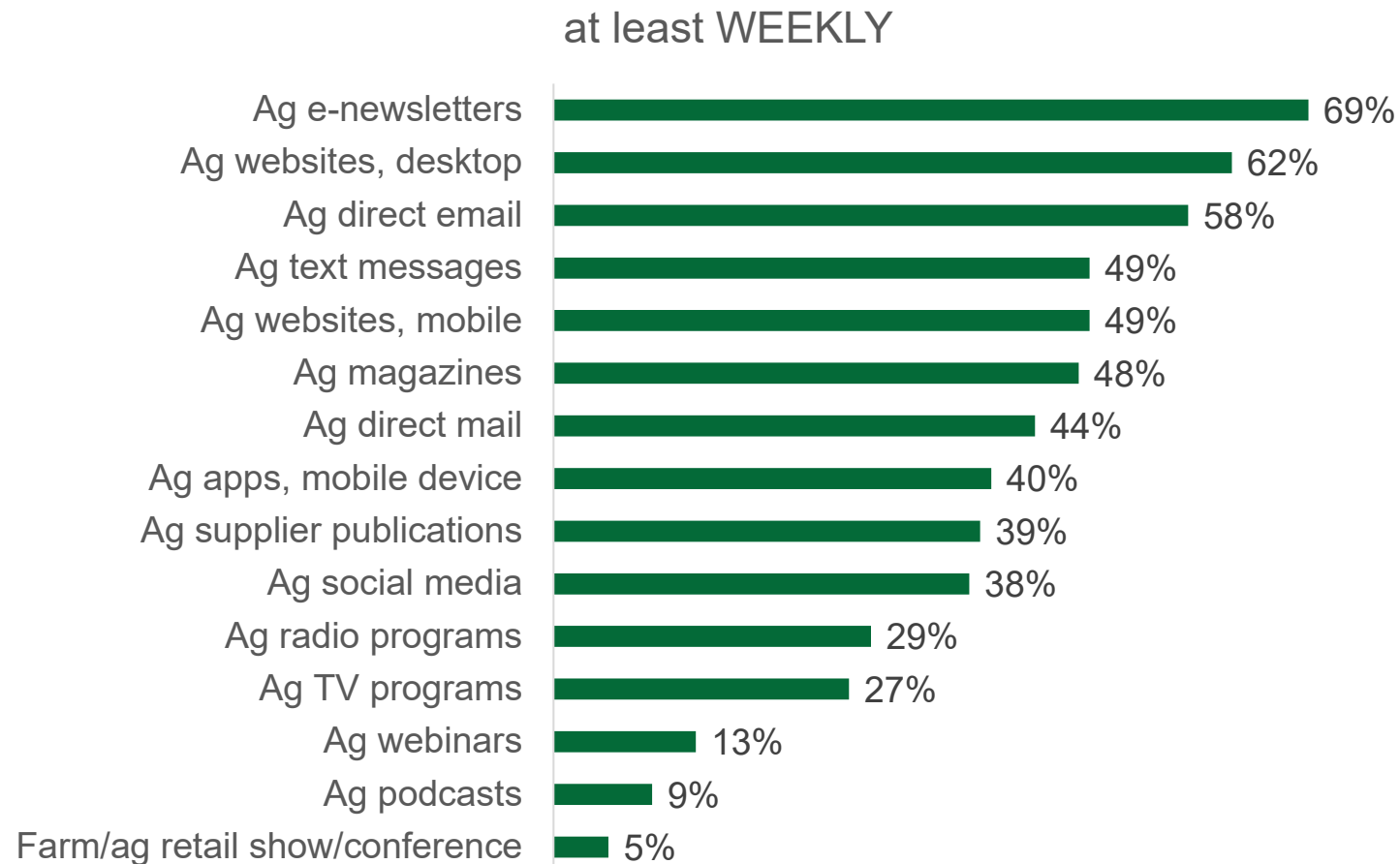


Q3 What is your age?

DETAILED FINDINGS



NEARLY HALF USE FIVE DISTINCT DIGITAL CHANNELS AT LEAST WEEKLY

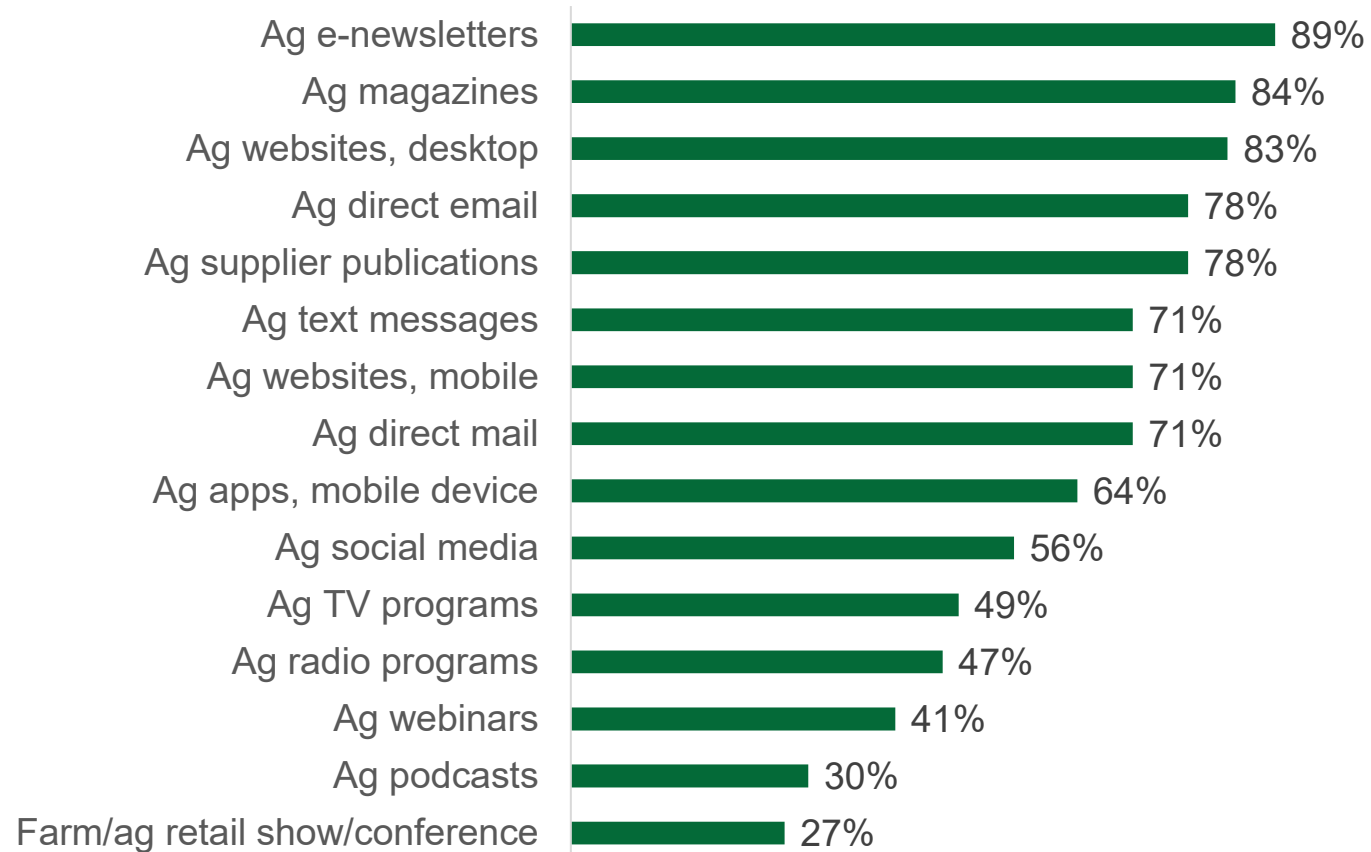


Q4 How often do you usually read, view, visit, attend, or use the following types of media or information sources for your ag retail and/crop consultant business?



E-NEWSLETTERS, MAGAZINES, AG WEBSITES ARE TOP MEDIA USED AT LEAST MONTHLY

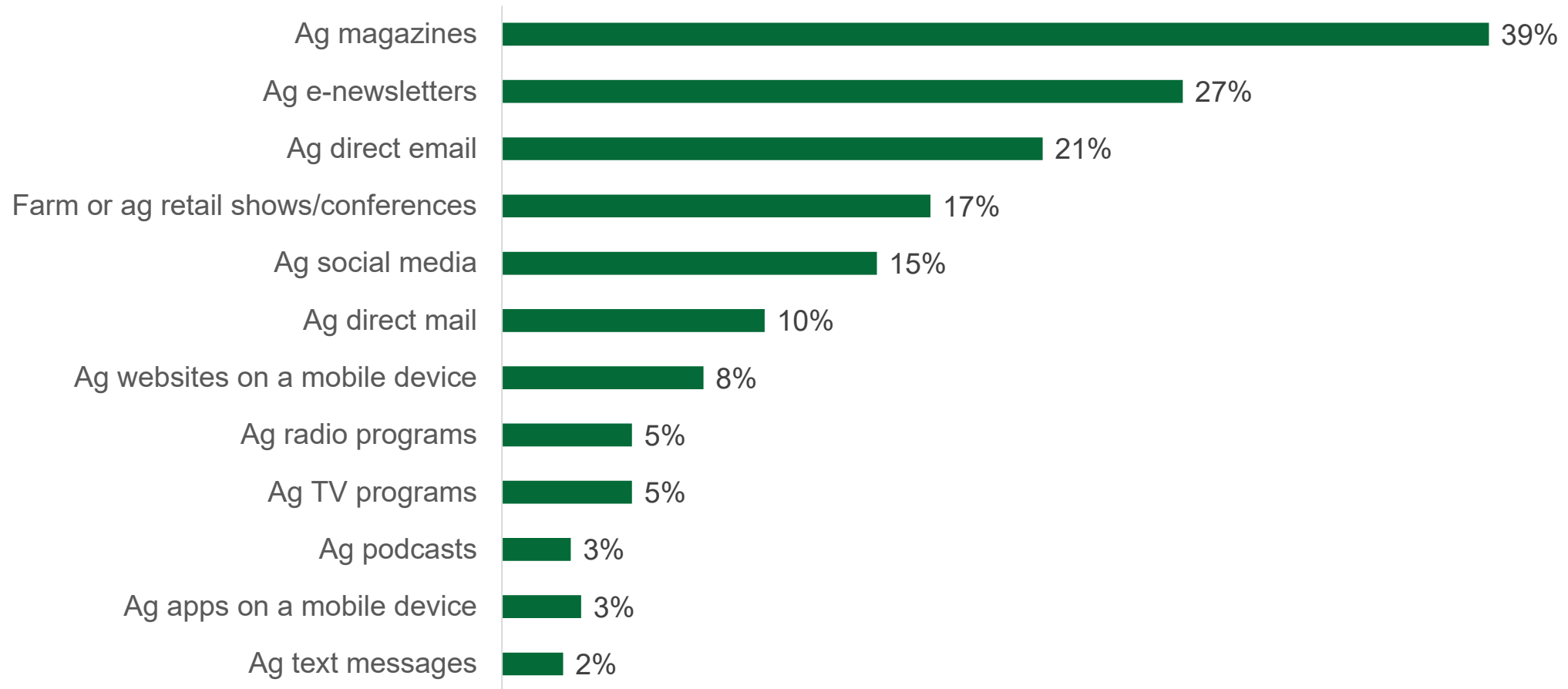
at least MONTHLY



Q4 How often do you usually read, view, visit, attend, or use the following types of media or information sources for your ag retail and/crop consultant business?



AG MAGAZINES ARE THE PRIMARY SOURCE WITH E-NEWSLETTERS SECOND TO FIRST LEARN ABOUT NEW PRODUCTS, EQUIPMENT, SERVICES OR SUPPLIERS



Q5 What are the top two sources from which you first learn about new agricultural products, equipment, services, or suppliers? Select two.

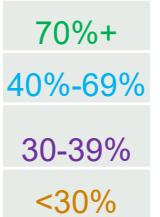
CONTRASTS BY AGE



E-NEWSLETTERS, MAGAZINES & DESKTOP WEBSITE USE STRONG REGARDLESS OF AGE

At Least Monthly, by Age

Channel	All	Under 40	41 to 49	50 to 59	60-plus
Ag e-newsletters	89%	83%	86%	87%	93%
Ag magazines	84%	79%	80%	86%	85%
Ag websites, desktop	83%	84%	88%	82%	80%
Ag direct email	78%	68%	88%	77%	79%
Ag supplier publications	78%	68%	87%	80%	76%
Ag websites, mobile device	71%	78%	88%	68%	57%
Ag direct mail	71%	59%	71%	79%	69%
Ag text messages	71%	45%	64%	58%	62%
Ag apps, mobile device	64%	59%	77%	65%	59%
Ag social media	56%	75%	70%	56%	35%
Ag TV programs	49%	41%	56%	53%	42%
Ag radio programs	47%	57%	55%	44%	38%
Ag webinars	41%	38%	40%	43%	44%
Ag podcasts	30%	64%	68%	58%	55%
Farm/ag shows/conferences	27%	18%	39%	25%	27%



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Q3 What is your age?

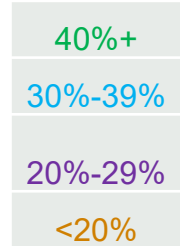
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MAGAZINES, E-NEWSLETTERS STRONG LEARNING SOURCES ACROSS AGES

Top Sources for Learning about New Products by Age

Channel	All	Under 40	41 to 49	50 to 59	60-plus
Ag magazines	39%	36%	27%	40%	47%
Ag e-newsletters	27%	34%	25%	21%	28%
Ag direct email	21%	15%	27%	26%	18%
Farm or ag retail shows/conferences	17%	25%	12%	14%	17%
Ag social media	15%	27%	23%	10%	6%
Ag direct mail	10%	2%	7%	19%	11%
Ag websites, mobile device	8%	8%	12%	5%	7%
Ag TV programs	5%	7%	3%	5%	5%
Ag radio programs	5%	3%	7%	7%	4%
Ag apps on mobile device	3%	5%	3%	3%	2%
Ag podcasts	3%	5%	2%	0%	4%
Ag text messages	2%	0%	0%	0%	0%
Ag manufacturer/supplier publications	0%	22%	32%	22%	22%
Ag websites, desktop	0%	7%	18%	15%	21%
Ag webinars	0%	3%	2%	10%	5%



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Q5 What are the top two sources from which you first learn about new agricultural products, equipment, services, or suppliers? Select two.
 Q3 What is your age?

AVID DIGITAL USERS

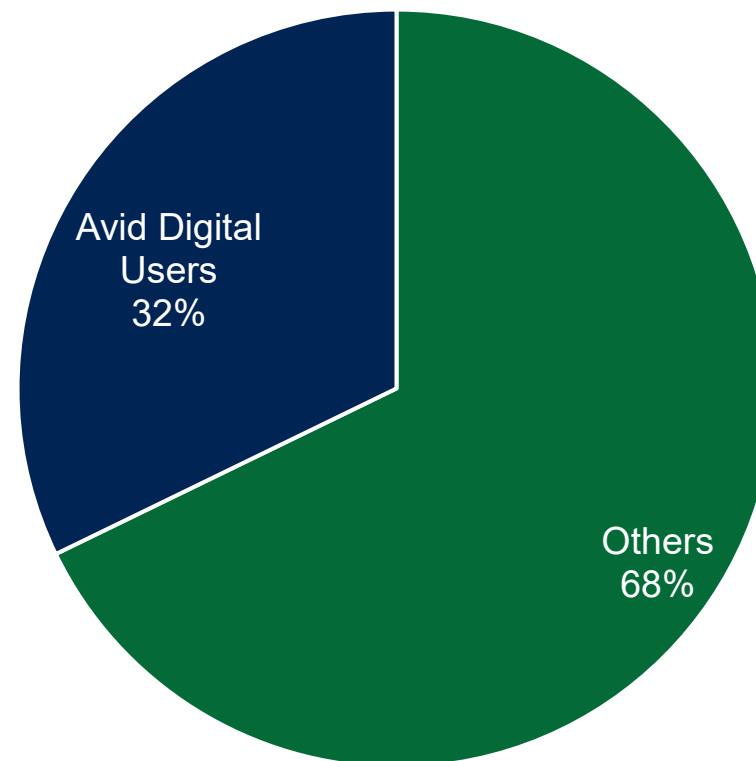


IDENTIFYING AVID DIGITAL USERS

Avid User Classification

- For study purposes, “avid digital users” are those using 2 or more of the following digital media daily:
 - E-newsletters
 - Websites, by mobile device
 - Text messages
 - Direct email
 - App, by mobile device
 - Social media

Percent Using 2+ Digital Media DAILY



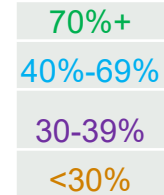
Q5 What are the top two sources from which you first learn about new agricultural products, equipment, services, or suppliers? Select two.



MAGAZINES, E-NEWSLETTERS, AG WEBSITES AND EMAIL ARE STRONG LEARNING SOURCES FOR AVID DIGITAL USERS

At Least Monthly, by Digital Users

Channel	All	Avid Digital Users
Ag e-newsletters	89%	96%
Ag magazines	84%	94%
Ag websites, desktop	83%	94%
Ag direct email	78%	97%
Ag supplier publications	78%	92%
Ag websites, mobile device	71%	90%
Ag direct mail	71%	87%
Ag text messages	71%	80%
Ag apps, mobile device	64%	84%
Ag social media	56%	81%
Ag TV programs	49%	64%
Ag radio programs	47%	58%
Ag webinars	41%	48%
Ag podcasts	30%	70%
Farm/ag shows/conferences	27%	31%



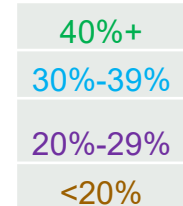
Q4 How often do you usually read, view, visit, attend, or use the following types of media or information sources for your ag retail and/crop consultant business?



MAGAZINES, E-NEWSLETTERS TOP SOURCES FOR DIGITAL USERS

Top Two Sources: Avid Digital Users vs. All

	All	Avid Digital Users
Ag magazines	39%	34%
Ag e-newsletters	27%	28%
Ag direct email	21%	31%
Ag manufacturer/supplier publications	24%	19%
Ag social media	15%	17%
Ag websites, desktop	16%	15%
Farm or ag retail shows/conferences	17%	13%
Ag direct mail	10%	9%
Ag websites, mobile device	8%	7%
Ag apps, mobile device	3%	9%
Ag webinars	5%	6%
Ag radio programs	5%	4%
Ag TV programs	5%	2%
Ag text messages	2%	4%
Ag podcasts	3%	1%



boldface=digital

Q5 What are the top two sources from which you first learn about new agricultural products, equipment, services, or suppliers? Select two.

KEY TAKE-AWAYS



KEY TAKE-AWAYS

- **Digital channels** are popular among retailers, with the top six channels used **at least weekly** falling under the digital umbrella. These include ag e-newsletters, used at least weekly by 69%, ag websites on desktop (62%), ag direct email (58%), ag text messages (49%), and ag websites on a mobile device (49%).
- Though typically issued monthly, **ag magazines are used at least weekly by 48% of retailers**—making them a contender for frequency with digital channels such as text messages and websites accessed by mobile device.
- **More than 80%** of respondents use ag e-newsletters (89%), ag magazines (84%) and ag websites (83%) via desktop **at least monthly**.



KEY TAKE-AWAYS

- Retailers selected a diverse set of twelve different channels as being their “**top two sources**” from which they first learn about ag equipment, products, services and suppliers. **Ag magazines** were by far selected most often (39%), followed by **ag e-newsletters** (27%) and ag direct email (17%).
- While monthly **use of social media appears negatively correlated with age, use of digital channels** including e-newsletters and websites via desktop **does not**.



KEY TAKE-AWAYS

- While **magazines** were frequently identified as “**top sources**” across all age groups, magazines were cited **least by those aged 41 to 49 (27%)**, and most by those aged 60-plus (47%). **E-newsletter** also are cited as a “**top source**” across age brackets but were cited **most often by those under 40 (34%)** and **least by those aged 50-59 (21%)**.
- Avid digital users more often cite ag direct email as a “top source” (31%) compared to all retailers (21%).
- In comparing “at least monthly” use of channels by avid digital users vs. all retailers, we see that **avid digital users** can also be described as simply **heavy information seekers**—via any channel. Avid digital users use ALL channels, at least monthly, more than all retailers.

FARM  **JOURNAL**



THE SCOOP

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Solutions For The Farmer's Adviser





THE SCOOP

In July 2020 Farm Journal's AgPro becomes **The Scoop**, providing **Solutions for the Farmer's Trusted Adviser**

- Research during development with representatives of the “Farmers Trusted Advisers” showed that this audience prefers The Scoop:
 - “The name tells me I’ll get some inside information.”
 - “You can scoop just about everything in ag—so it’s fitting.”
 - “I like the connotation. I want to know what’s behind the scenes.”
- Guided by Margy Eckelkamp and advisory board of leading ag retail managers, crop consultants, C suite leaders
 - We are going to create a cartel of influencers

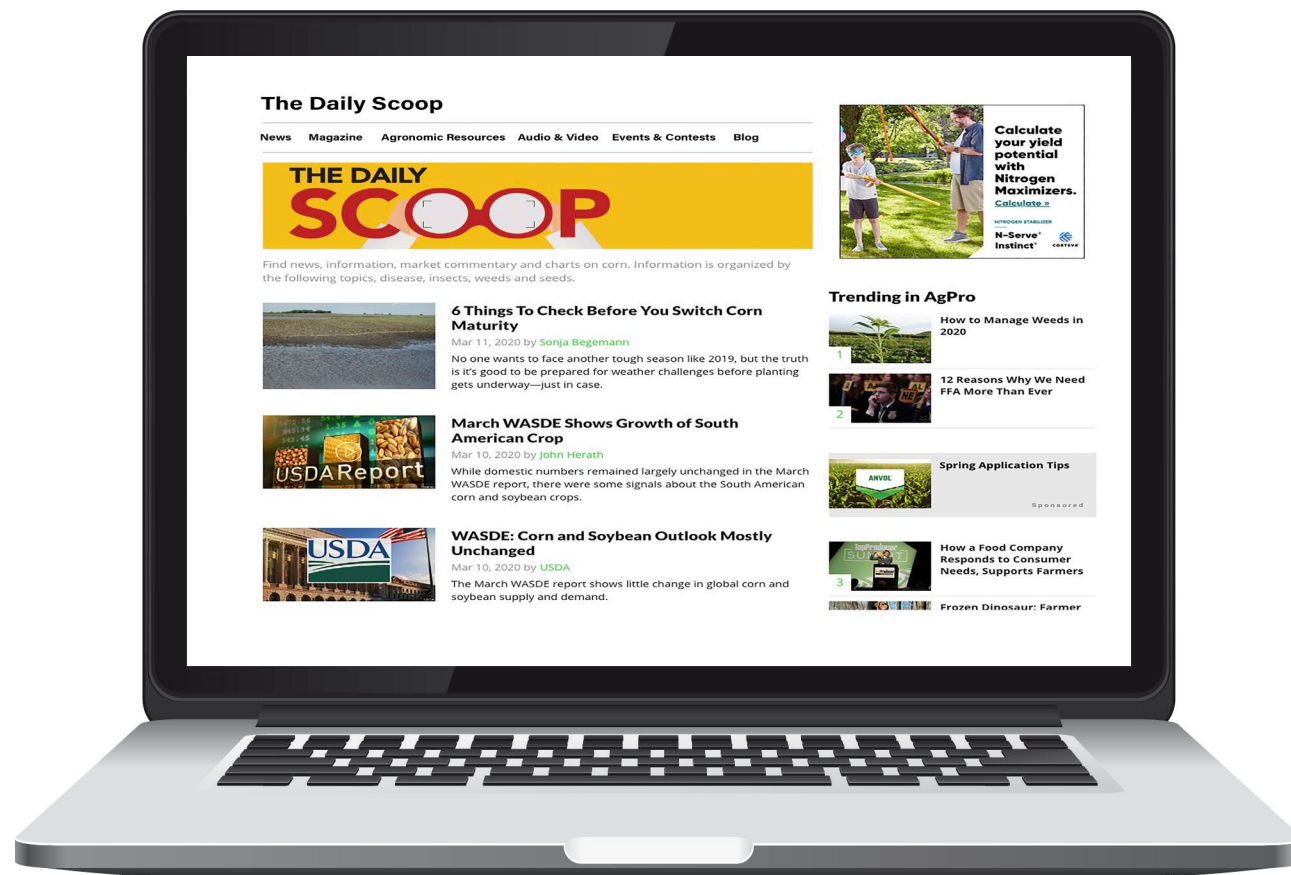


WE DELIVER THE SCOOP

- New brand is a wink and a nod to our audience
- “We get you” tone and focus
 - Fun yet informative
 - Resonates with the audience
 - Build a community reflecting the trusted advisers serving farmers
- 100% digital first driven by a daily eNewsletter, **The Daily Scoop**, and website, **TheDailyScoop.com**, and social media engine
- Content focused on usability
 - Category and product explainers
 - Ag retail facility improvements
 - Industry news
 - Agronomic knowledge powered by Farm Journal’s test plots

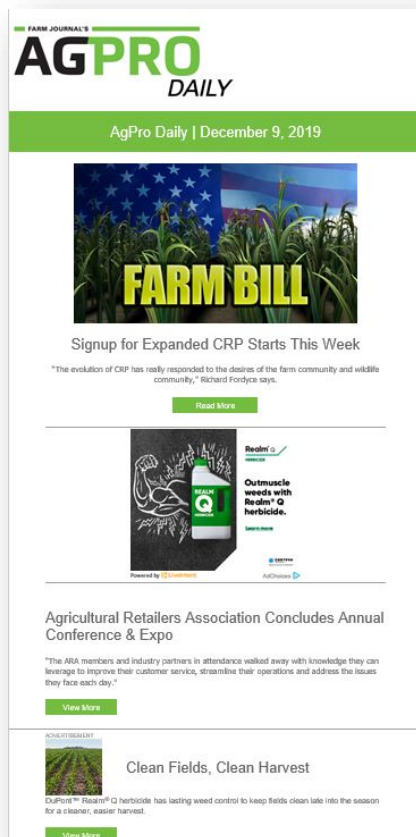


NEW WEBSITE





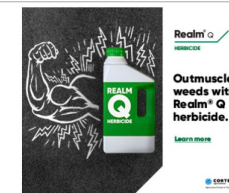
NEW ENEWSLETTER



[Fourth-Largest Soybean Crop Projected For 2020](#)

Todd Hubbs with University of Illinois says the number of soybean acres planted could total close to 85.4 million.

[Read more](#)



[Flood Battle Scars of 2019](#)

The Missouri River has posted more consecutive days above flood stage in 2019 than in 1993 and 2011, the past two major floods.

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[Clean Fields, Clean Harvest](#)

DuPont™ Realm® Q herbicide has lasting weed control to keep fields clean late into the season for a cleaner, easier harvest.

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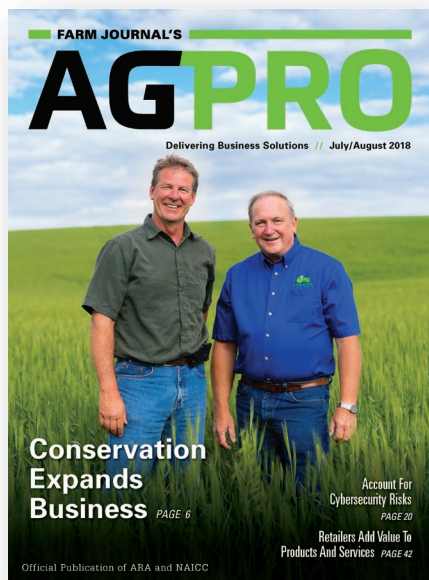
[One-on-One With Wilbur-Ellis CEO John Buckley](#)

Right after Wilbur-Ellis announced its biggest acquisition to-date – acquiring Nachurs Alpine Solutions (NAS) – CEO John Buckley gave AgPro a one-on-one interview.

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NEW MAGAZINE



A strong color palette differentiating The Scoop from other ag publications based in earthier tones

Strong colors reemphasize the value of business knowledge in the ag retail sector





TIMELINE – KEY DATES

- JUL. 1 – August/September Issue Ad Close Date
- JUL. 3 – Digital Launch on Website & eNewsletter
- AUG. 3 – The Scoop August/September issue mail date