

Ag Media Council

Collaboration, Education and
Research to Support Agriculture



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Sample and Response

- ◆ Samples were selected from Ag Media Council member databases to cover a broad range of farm/ranch commodities in the U.S. and to meet minimum acreage/head requirements (e.g., 250 acres corn, 100+ head cow/calf, 50+ acres fruit, etc.).
- ◆ Participating organizations sent email invitations between January 17 and February 11, 2022 to approximately 265,000* individuals.
- ◆ Received 3,119 total responses (1% response rate).
- ◆ Results based on the 2,867 respondents who indicated they are owners/operators/managers of farms or ranches (referred to as “operators” in this report).



Study Changes

- ◆ As in 2020, the 2022 study was conducted **exclusively online** (earlier studies were mixed-mode, both mail and online fielding).
- ◆ For comparability and to eliminate mode effects, the 2022 results in this report are compared to the 2020 and 2018 online results only.
- ◆ Very few changes were made to the survey questions in 2022:
 - ◆ One question was added regarding why operators visit **ag-focused websites**.
 - ◆ **Virtual events** were added to the list of media channels studied and farm shows were changed to **in-person farm shows**.
 - ◆ One question was added regarding percentage of acres planted in a **controlled environment**.



Media Channels Studied

- ◆ agricultural magazines or newspapers
- ◆ agricultural e-newsletters
- ◆ agricultural websites
- ◆ agricultural websites on a mobile device (e.g., smartphone, tablet)
- ◆ agricultural apps on a mobile device (e.g., smartphone, tablet)
- ◆ agricultural text messages
- ◆ agricultural social media (blogs, Facebook, Twitter, etc.)
- ◆ agricultural podcasts
- ◆ agricultural webinars
- ◆ agricultural direct e-mail
- ◆ agricultural direct mail
- ◆ in-person farm shows (*updated for 2022 survey*)
- ◆ virtual events (*new to 2022 survey*)
- ◆ agricultural conferences or seminars
- ◆ agricultural dealers / retailers
- ◆ agricultural consultants
- ◆ agricultural manufacturer or supplier publications
- ◆ agricultural radio programs
- ◆ agricultural TV programs



Executive Summary

- ◆ This is the seventh survey (2022, 2020, 2018, 2016, 2014, 2012, 2010) in which many “core” questions have been used for tracking purposes.
- ◆ The information presented in this report is based on the three most recent online studies, 2022, 2020 and 2018. Prior studies were conducted either entirely by mail or a mixed method. Overall number of responses included this year was 2,867, down very slightly from ‘18 and ‘20.
- ◆ The trended results indicate a remarkable consistency to the information gathered and reported. Of course, there are some data points that vary study over study, and one can’t help wonder how much of an impact the pandemic may have had on any of the measures observed in 2022 relative to the previous studies.
- ◆ Ag magazines and newspapers are the leading channel, of all channels measured, when it comes to both weekly and monthly usage.



Executive Summary (continued)

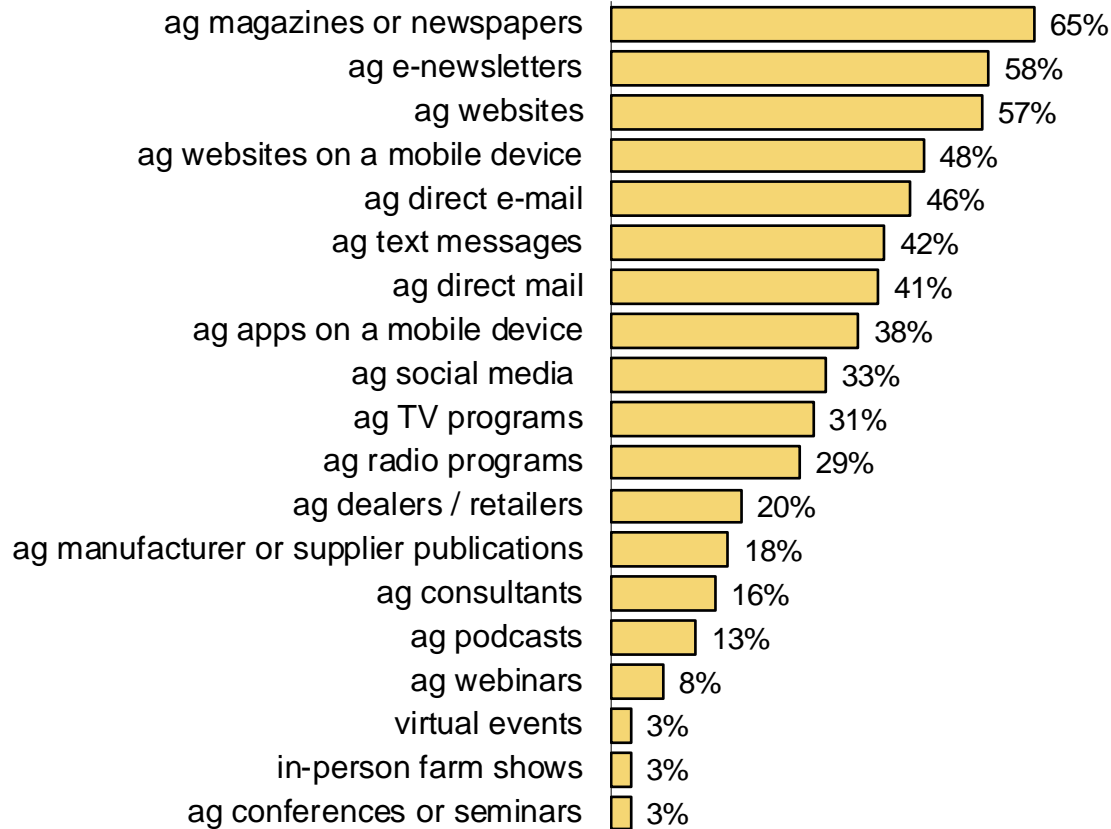
- ◆ A large percentage of the questions in the study have been repeated for many years, including the “purchase journey” question. Results to this question in 2022 align with what we have seen in all previous studies: At the start of the journey, operators rely to a great degree on magazine, newspapers and websites. As the journey nears an end, and a purchase decision nears, the dealer/retailer plays a key role.
- ◆ Magazines and newspapers are the top resources for learning about new products and services.
- ◆ When operators view video content online and look for webinar opportunities, the content they prefer most is aimed at continuing education as well as product/service demonstrations, training and tutorials.
- ◆ Operators indicated their primary reasons for visiting agricultural-focused websites include keeping up with industry trends, weather and commodity market intelligence.

DETAILED FINDINGS



More than half of operators use ag magazines/newspapers (65%), ag e-newsletters (58%), and/or websites (57%) at least weekly.

at least WEEKLY

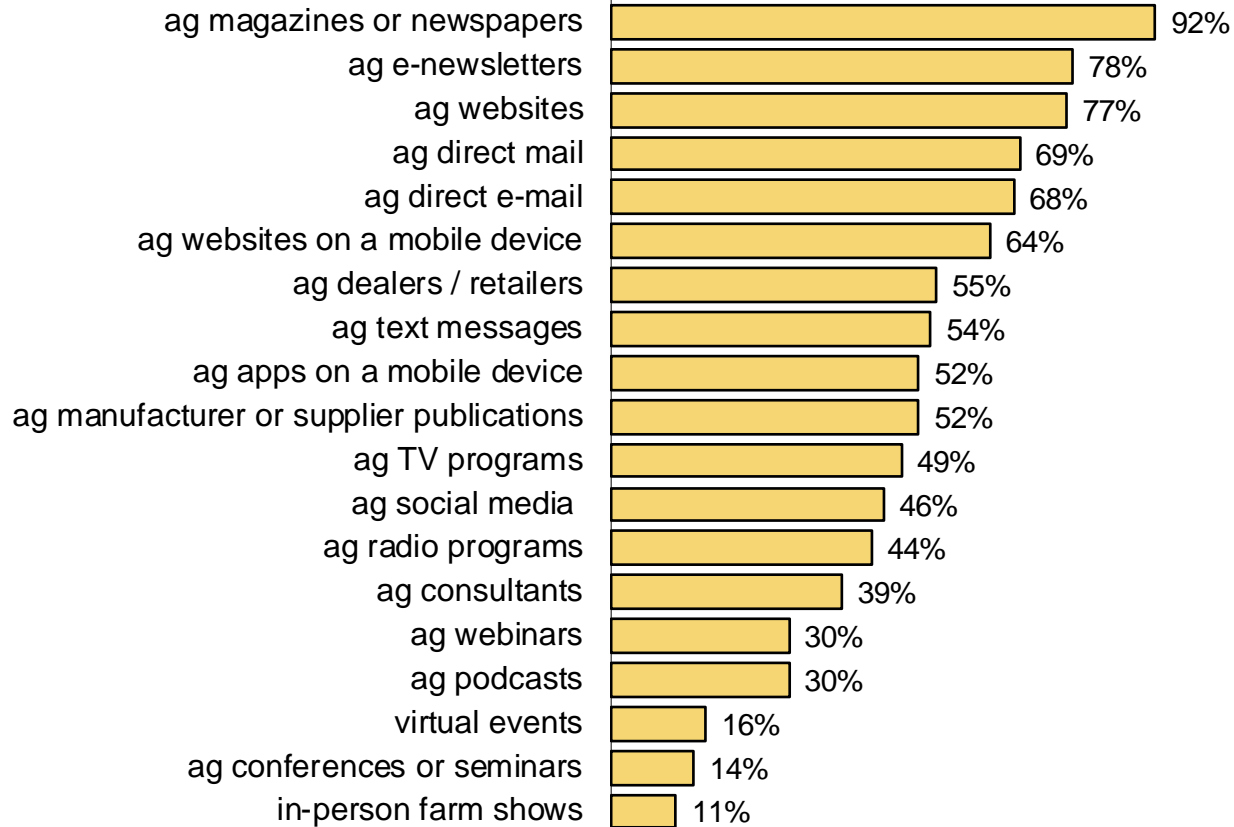


How often do you usually read, view, visit, attend, or use the following types of media or information sources?



Nearly all (92%) use ag magazines/newspapers at least monthly.

at least MONTHLY



How often do you usually read, view, visit, attend, or use the following types of media or information sources?



Overall, weekly use of the various media/information sources has not changed much in recent years.

AT LEAST WEEKLY			
	2018	2020	2022
ag magazines or newspapers	72%	73%	65%
ag e-newsletters	68%	66%	58%
ag websites	64%	63%	57%
ag websites on a mobile device	51%	51%	48%
ag direct e-mail	52%	52%	46%
ag text messages	45%	45%	42%
ag direct mail	48%	47%	41%
ag apps on a mobile device	42%	41%	38%
ag social media	30%	33%	33%
ag TV programs	35%	37%	31%
ag radio programs	34%	34%	29%
ag dealers / retailers	20%	21%	20%
ag manufacturer or supplier publications	19%	17%	18%
ag consultants	17%	16%	16%
ag podcasts [2020 & 2022]		12%	13%
ag webinars	7%	7%	8%
virtual events [2022 only]			3%
in-person farm shows [farm shows: 2018-2020]	3%	4%	3%
ag conferences or seminars	2%	4%	3%

- 60%+
- 40% - 59%
- 30% - 39%
- 20% - 29%

boldface = digital

How often do you usually read, view, visit, attend, or use the following types of media or information sources?



The same goes for monthly usage – we see minimal changes from 2018 to today.

AT LEAST MONTHLY			
	2018	2020	2022
ag magazines or newspapers	93%	93%	92%
ag e-newsletters	83%	81%	78%
ag websites	81%	81%	77%
ag direct mail	74%	72%	69%
ag direct e-mail	71%	71%	68%
ag websites on a mobile device	64%	65%	64%
ag dealers / retailers	58%	58%	55%
ag text messages	56%	56%	54%
ag apps on a mobile device	53%	54%	52%
ag manufacturer or supplier publications	54%	54%	52%
ag TV programs	53%	54%	49%
ag social media	41%	45%	46%
ag radio programs	49%	49%	44%
ag consultants	41%	41%	39%
ag webinars	23%	23%	30%
ag podcasts [2020 & 2022]		27%	30%
virtual events [2022 only]			16%
ag conferences or seminars	14%	16%	14%
in-person farm shows [farm shows: 2018-2020]	11%	13%	11%

60%+

40% - 59%

30% - 39%

20% - 29%

boldface = digital

How often do you usually read, view, visit, attend, or use the following types of media or information sources?



Use of magazines/newspapers is high—even among daily digital users of ag media.

AT LEAST WEEKLY	daily	
	TOTAL	digital users
ag magazines or newspapers	65%	77%
ag e-newsletters	58%	80%
ag websites	57%	79%
ag websites on a mobile device	48%	69%
ag direct e-mail	46%	69%
ag text messages	42%	67%
ag direct mail	41%	57%
ag apps on a mobile device	38%	58%
ag social media	33%	49%
ag TV programs	31%	42%
ag radio programs	29%	40%
ag dealers / retailers	20%	27%
ag manufacturer or supplier publications	18%	26%
ag consultants	16%	22%
ag podcasts [2020 & 2022]	13%	21%
ag webinars	8%	13%
virtual events [2022 only]	3%	5%
in-person farm shows [farm shows: 2018-2020]	3%	4%
ag conferences or seminars	3%	4%

- 60%+
- 40% - 59%
- 30% - 39%
- 20% - 29%

boldface = digital

How often do you usually read, view, visit, attend, or use the following types of media or information sources?



Weekly use for certain media channels varies by size of their operations (in terms of annual gross receipts).

AT LEAST WEEKLY		<\$250K	\$250K- \$499K	\$500K - \$999K	\$1M+
ag magazines or newspapers		60%	69%	74%	72%
ag e-newsletters		51%	62%	66%	69%
ag websites		48%	62%	66%	69%
ag websites on a mobile device		37%	51%	54%	65%
ag direct e-mail		36%	48%	55%	61%
ag text messages		26%	46%	58%	62%
ag direct mail		33%	43%	50%	53%
ag apps on a mobile device		26%	40%	47%	58%
ag social media		30%	33%	40%	40%
ag TV programs		27%	38%	34%	34%
ag radio programs		21%	36%	40%	36%
ag dealers / retailers		14%	19%	24%	31%
ag manufacturer or supplier publications		14%	19%	21%	25%
ag consultants		8%	15%	19%	30%
ag podcasts [2020 & 2022]		9%	13%	16%	18%
ag webinars		6%	9%	9%	12%
virtual events [2022 only]		2%	2%	4%	5%
in-person farm shows [farm shows: 2018-2020]		3%	3%	3%	5%
ag conferences or seminars		2%	3%	3%	4%

- 60%+
- 40% - 59%
- 30% - 39%
- 20% - 29%

boldface = digital

How often do you usually read, view, visit, attend, or use the following types of media or information sources?



Use of ag magazines/newspapers is high across all age groups. For many of the digital channels, use is significantly higher among younger operators than those older.

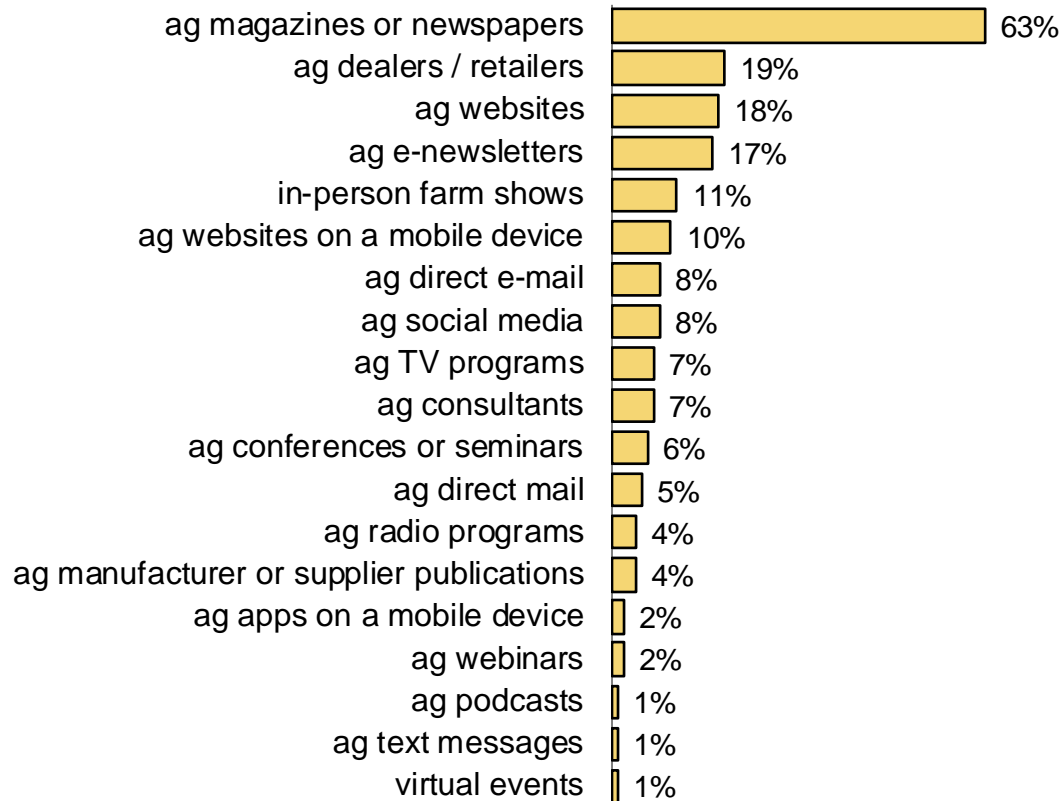
AT LEAST WEEKLY			
	<45	45 - 64	65+
ag magazines or newspapers	61%	67%	65%
ag e-newsletters	61%	61%	55%
ag websites	64%	60%	51%
ag websites on a mobile device	63%	52%	38%
ag direct e-mail	50%	50%	42%
ag text messages	44%	48%	36%
ag direct mail	44%	43%	39%
ag apps on a mobile device	51%	43%	30%
ag social media	54%	36%	25%
ag TV programs	27%	32%	32%
ag radio programs	27%	30%	29%
ag dealers / retailers	25%	21%	17%
ag manufacturer or supplier publications	21%	18%	18%
ag consultants	22%	17%	13%
ag podcasts [2020 & 2022]	24%	12%	10%
ag webinars	13%	8%	7%
virtual events [2022 only]	4%	3%	3%
in-person farm shows [farm shows: 2018-2020]	5%	3%	3%
ag conferences or seminars	5%	3%	2%

boldface = digital

How often do you usually read, view, visit, attend, or use the following types of media or information sources?



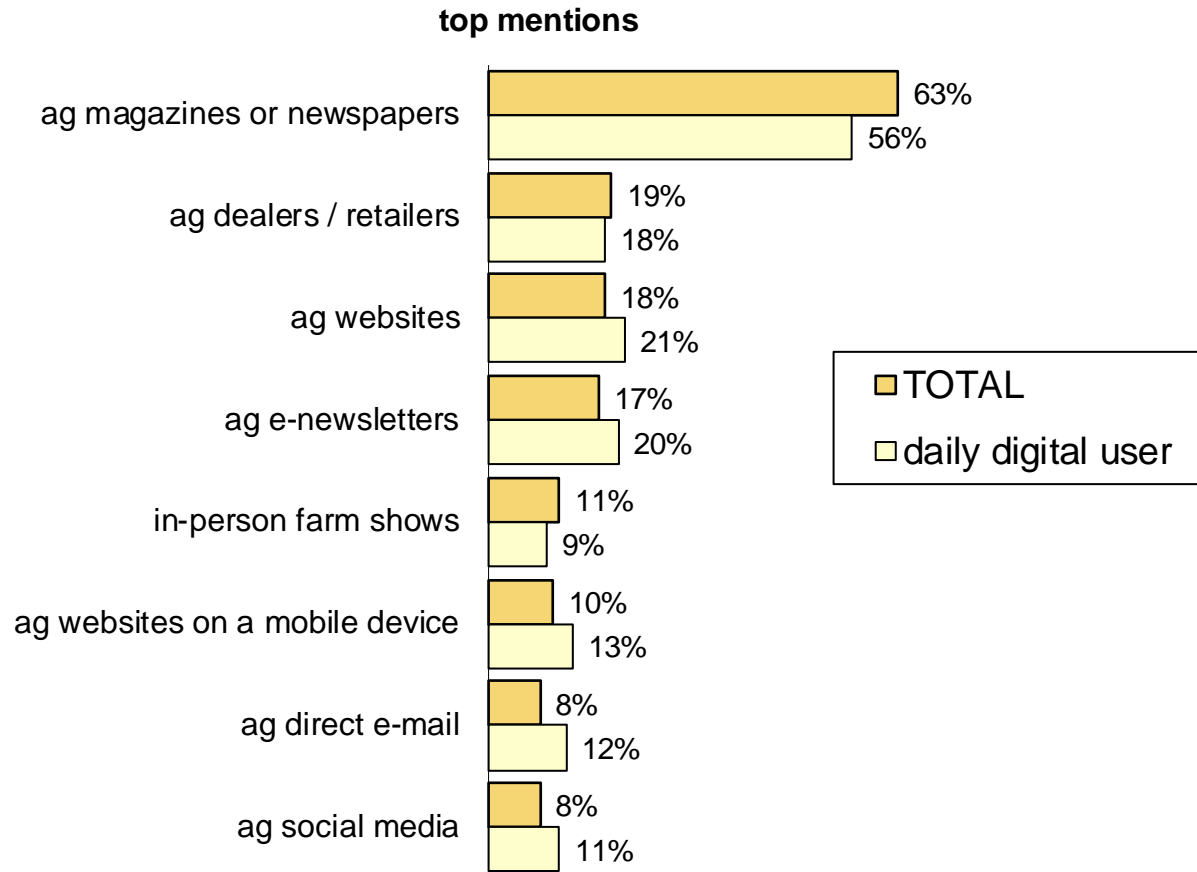
Ag magazines/newspapers is the leading source (by far) for operators to first learn about new agricultural products/equipment/services/suppliers.



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



Top sources for first learning about new agricultural products/services are similar among daily digital users when compared to all operators.



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



Magazines/newspapers continue to be the number one driver for prompting operators to visit agricultural websites—even among daily digital users.

	TOTAL	daily digital users
ag magazines or newspapers	65%	70%
ag e-newsletters	32%	43%
ag dealers / retailers	30%	36%
web search results	29%	36%
ag websites	27%	36%
ag direct e-mail	22%	31%
in-person farm shows	20%	23%
ag direct mail	20%	24%
ag websites on a mobile device	19%	27%
ag manufacturer or supplier publications	16%	21%
ag TV programs	16%	19%
ag social media	14%	21%
ag consultants	14%	16%
ag conferences or seminars	14%	15%
ag radio programs	11%	14%
ag apps on a mobile device	10%	16%
ag text messages	9%	15%
ag webinars	8%	10%
virtual events	6%	8%
ag podcasts	5%	7%

50%+

40% - 49%

30% - 39%

20% - 29%

boldface = digital

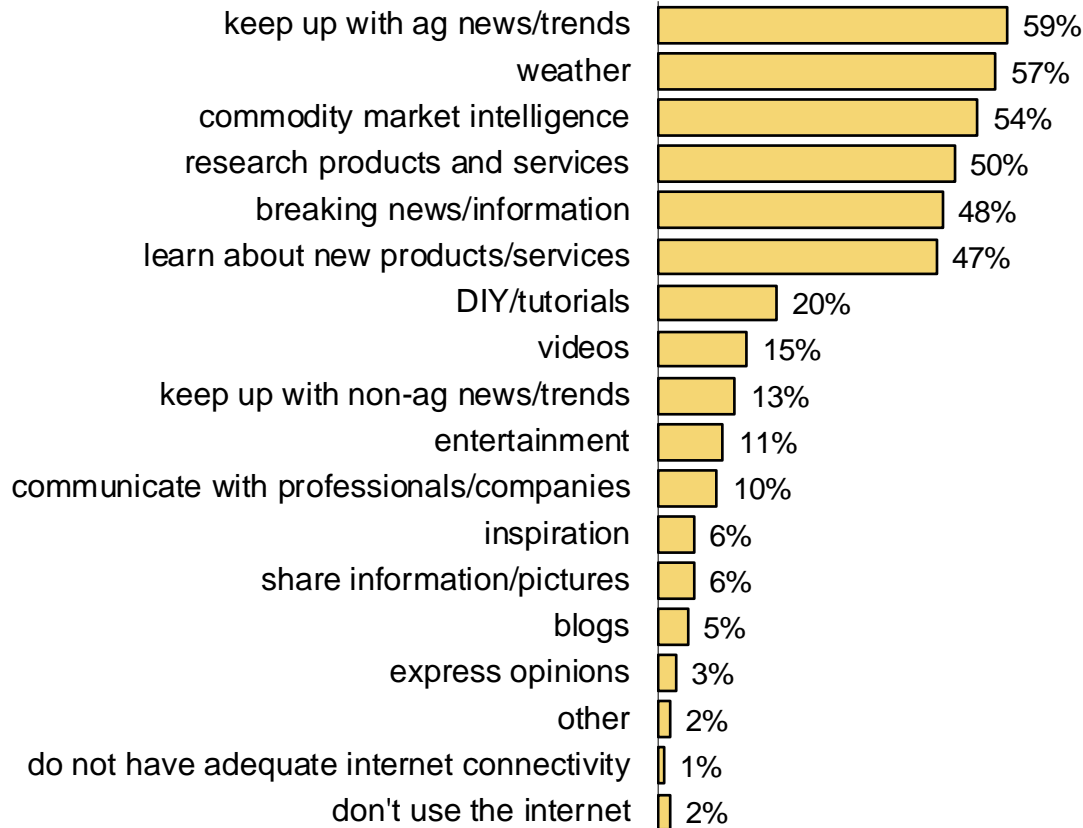
In the past 6 months, which of the following have prompted you to visit an agricultural website?

base: owners/operators/managers of farms or ranches in each segment
(multiple answers)



Operators use/access agriculture-focused websites for a variety of reasons.

Reasons for Using Ag Websites



For what reasons do you use/access agriculture-focused websites?



Purchase Journey

	start thinking about purchase	begin researching options	narrow down choices	make final decision
ag apps on a mobile device				
ag conferences or seminars				
ag consultants				
ag dealers / retailers				
ag direct e-mail				
ag direct mail				
ag e-newsletters				
ag magazines or newspapers				
ag manufacturer or supplier publications				
ag podcasts				
ag radio programs				
ag social media				
ag text messages				
ag TV programs				
ag webinars				
ag websites				
ag websites on a mobile device				
in-person farm shows				
virtual events				
other				

boldface = digital

Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



Purchase Journey

	start thinking about purchase	begin researching options	narrow down choices	make final decision
ag apps on a mobile device	12%			
ag conferences or seminars	16%			
ag consultants	13%			
ag dealers / retailers	19%			
ag direct e-mail	17%			
ag direct mail	19%			
ag e-newsletters	26%			
ag magazines or newspapers	49%			
ag manufacturer or supplier publications	15%			
ag podcasts	15%			
ag radio programs	16%			
ag social media	17%			
ag text messages	14%			
ag TV programs	18%			
ag webinars	15%			
ag websites	22%			
ag websites on a mobile device	15%			
in-person farm shows	21%			
virtual events	13%			
other	7%			

boldface = digital

Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



A range of sources are used at the very early stage, with magazines/newspapers as the clear leader.

	start thinking about purchase	begin researching options	narrow down choices	make final decision
ag apps on a mobile device	12%			
ag conferences or seminars	16%			
ag consultants	13%			
ag dealers / retailers	19%			
ag direct e-mail	17%			
ag direct mail	19%			
ag e-newsletters	26%			
ag magazines or newspapers	49%			
ag manufacturer or supplier publications	15%			
ag podcasts	15%			
ag radio programs	16%			
ag social media	17%			
ag text messages	14%			
ag TV programs	18%			
ag webinars	15%			
ag websites	22%			
ag websites on a mobile device	15%			
in-person farm shows	21%			
virtual events	13%			
other	7%			

boldface = digital

Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



Magazines/newspapers remain a top resource as farmers and ranchers begin researching options, with ag websites becoming equally important.

	start thinking about purchase	begin researching options	narrow down choices	make final decision
ag apps on a mobile device	12%	13%		
ag conferences or seminars	16%	14%		
ag consultants	13%	12%		
ag dealers / retailers	19%	20%		
ag direct e-mail	17%	15%		
ag direct mail	19%	15%		
ag e-newsletters	26%	19%		
ag magazines or newspapers	49%	29%		
ag manufacturer or supplier publications	15%	18%		
ag podcasts	15%	8%		
ag radio programs	16%	9%		
ag social media	17%	12%		
ag text messages	14%	10%		
ag TV programs	18%	9%		
ag webinars	15%	10%		
ag websites	22%	31%		
ag websites on a mobile device	15%	21%		
in-person farm shows	21%	18%		
virtual events	13%	8%		
other	7%	3%		

boldface = digital

Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



Dealers/retailers and ag websites most commonly help decision-makers narrow down their choices.

	start thinking about purchase	begin researching options	narrow down choices	make final decision
ag apps on a mobile device	12%	13%	12%	
ag conferences or seminars	16%	14%	14%	
ag consultants	13%	12%	17%	
ag dealers / retailers	19%	20%	28%	
ag direct e-mail	17%	15%	11%	
ag direct mail	19%	15%	11%	
ag e-newsletters	26%	19%	10%	
ag magazines or newspapers	49%	29%	15%	
ag manufacturer or supplier publications	15%	18%	21%	
ag podcasts	15%	8%	6%	
ag radio programs	16%	9%	7%	
ag social media	17%	12%	10%	
ag text messages	14%	10%	7%	
ag TV programs	18%	9%	7%	
ag webinars	15%	10%	9%	
ag websites	22%	31%	31%	
ag websites on a mobile device	15%	21%	20%	
in-person farm shows	21%	18%	22%	
virtual events	13%	8%	8%	
other	7%	3%	4%	

boldface = digital

Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



Consulting with the dealer/retailer is most important, by far, at the point of decision!

	start thinking about purchase	begin researching options	narrow down choices	make final decision
ag apps on a mobile device	12%	13%	12%	2%
ag conferences or seminars	16%	14%	14%	6%
ag consultants	13%	12%	17%	14%
ag dealers / retailers	19%	20%	28%	38%
ag direct e-mail	17%	15%	11%	3%
ag direct mail	19%	15%	11%	3%
ag e-newsletters	26%	19%	10%	2%
ag magazines or newspapers	49%	29%	15%	5%
ag manufacturer or supplier publications	15%	18%	21%	13%
ag podcasts	15%	8%	6%	2%
ag radio programs	16%	9%	7%	3%
ag social media	17%	12%	10%	3%
ag text messages	14%	10%	7%	2%
ag TV programs	18%	9%	7%	3%
ag webinars	15%	10%	9%	3%
ag websites	22%	31%	31%	11%
ag websites on a mobile device	15%	21%	20%	7%
in-person farm shows	21%	18%	22%	10%
virtual events	13%	8%	8%	3%
other	7%	3%	4%	3%

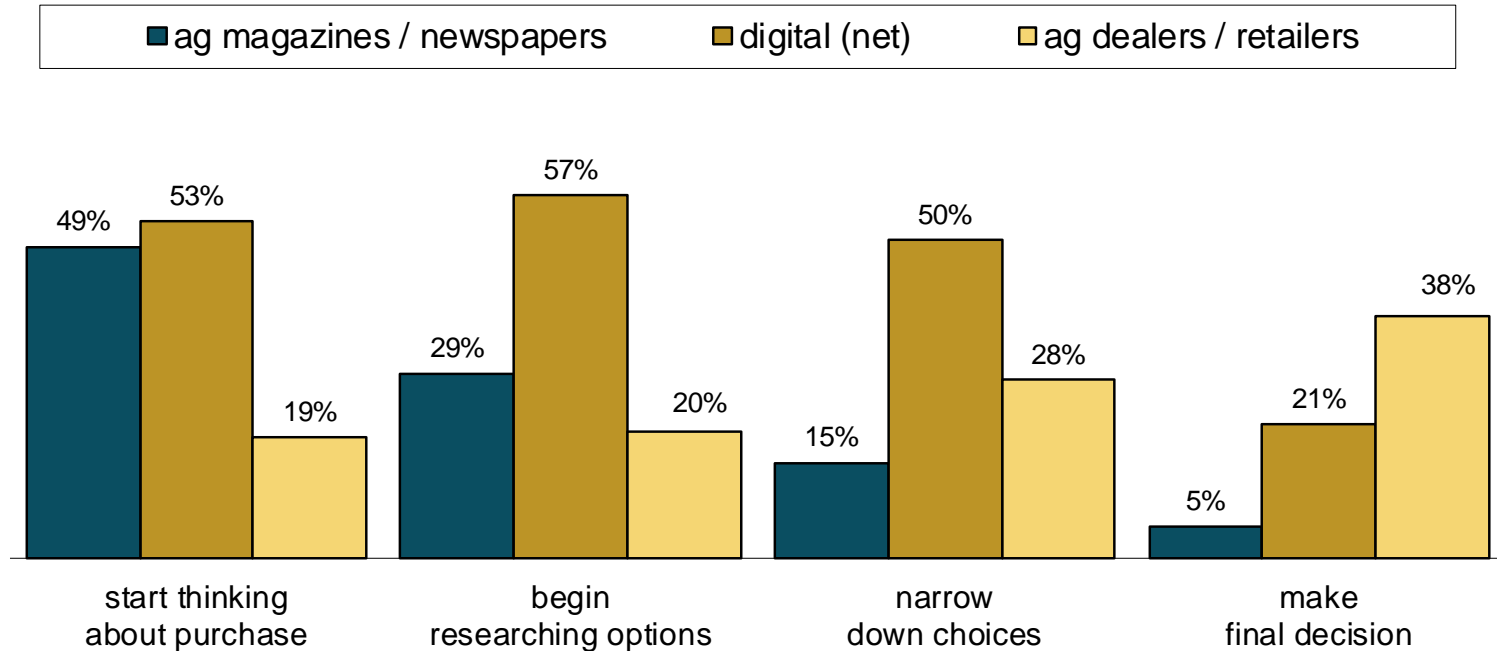
boldface = digital

Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



Print, digital, and in-person resources each play a point-specific role in the purchase journey life cycle.

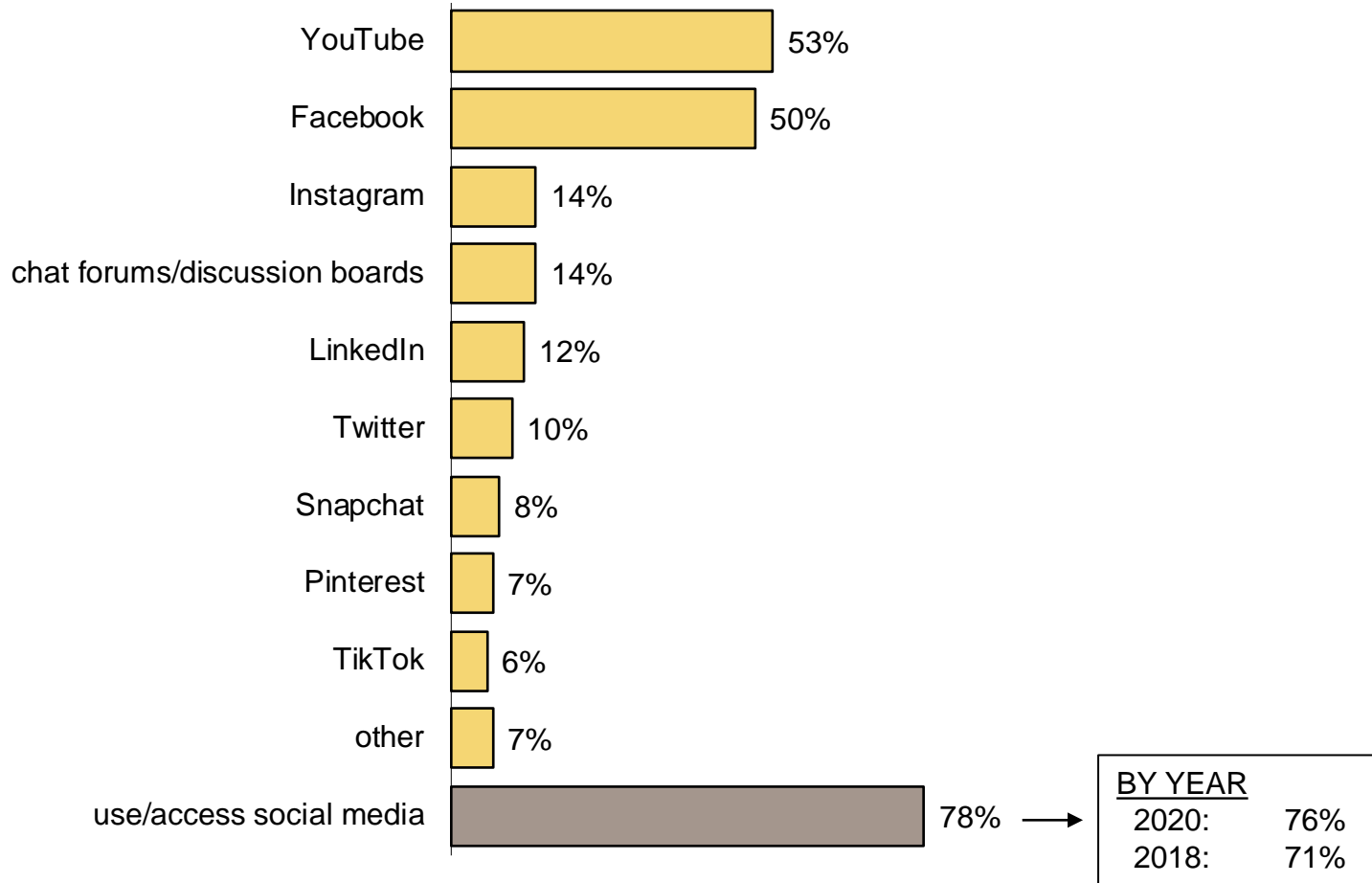


Which of these information sources do you use at each point in the decision-making process for agricultural products, equipment, services, or suppliers?

base: 2,653 owners/operators/managers of farms or ranches involved in decision-making (multiple answers)



Three-fourths (78%) of operators use/access social media, most commonly YouTube (53%) and/or Facebook (50%).

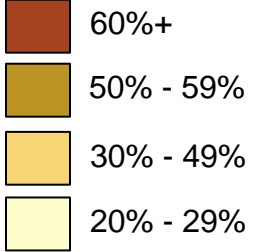


What social media do you use/access?



Younger operators are much more likely than their older counterparts to use/access many of the social media platforms.

	<45	45 - 64	65+
YouTube	64%	57%	47%
Facebook	62%	52%	44%
Instagram	31%	16%	7%
chat forums/discussion boards	25%	15%	9%
LinkedIn	18%	13%	8%
Twitter	21%	12%	5%
Snapchat	25%	9%	2%
Pinterest	13%	7%	6%
TikTok	19%	7%	1%
other	5%	6%	9%



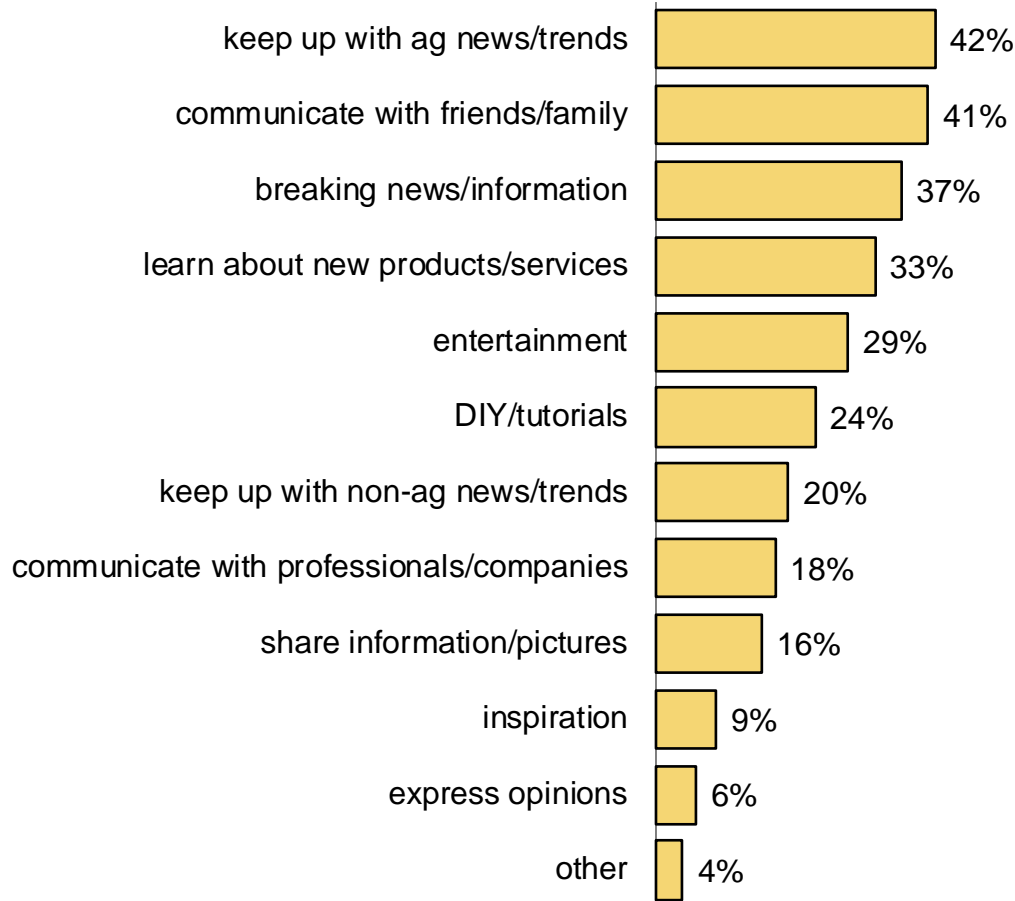
Legend for social media usage percentages by age group:

- 60%+ (Dark Red)
- 50% - 59% (Medium Red)
- 30% - 49% (Light Red)
- 20% - 29% (Yellow)

What social media do you use/access?



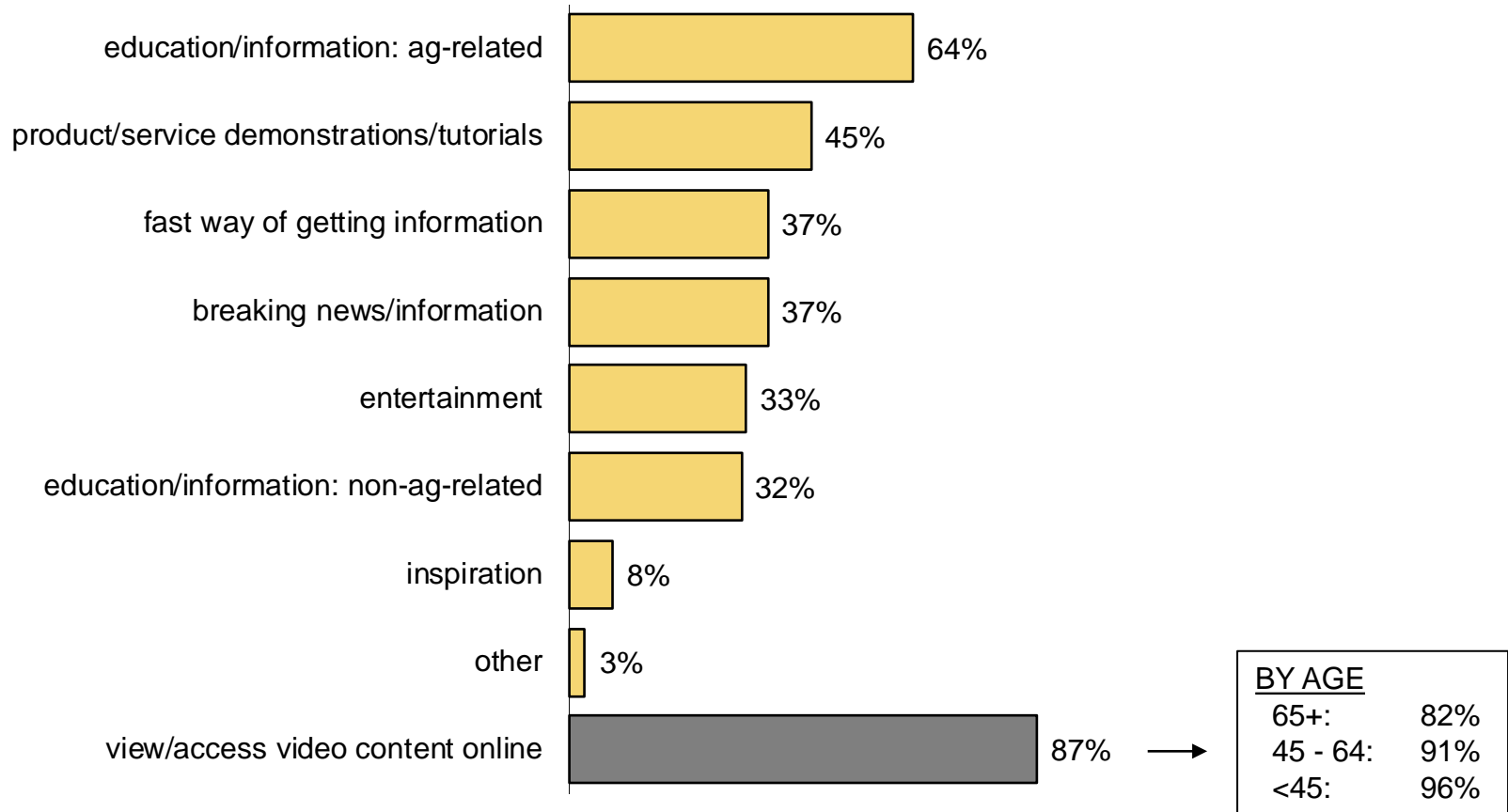
Operators use/access social media for a variety of reasons—led by keeping up with agricultural news/trends (42%) and communicating with friends/family (41%).



For what reasons do you use/access social media?



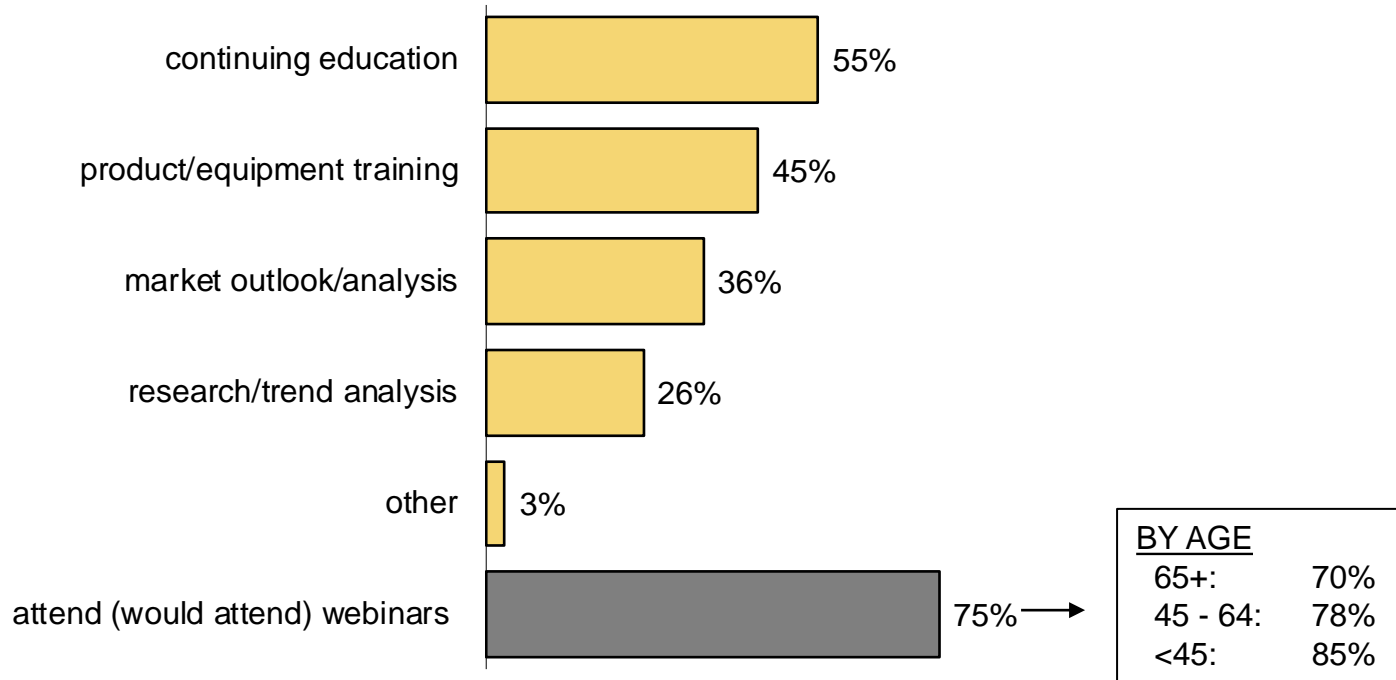
About nine in ten operators (87%) view video content online, most commonly for ag-related education/information (64%).



For what reasons do you view/access video content online?



Three in four operators (75%) attend (or would attend) webinars, most commonly for continuing education (55%) followed by product/equipment training (45%).

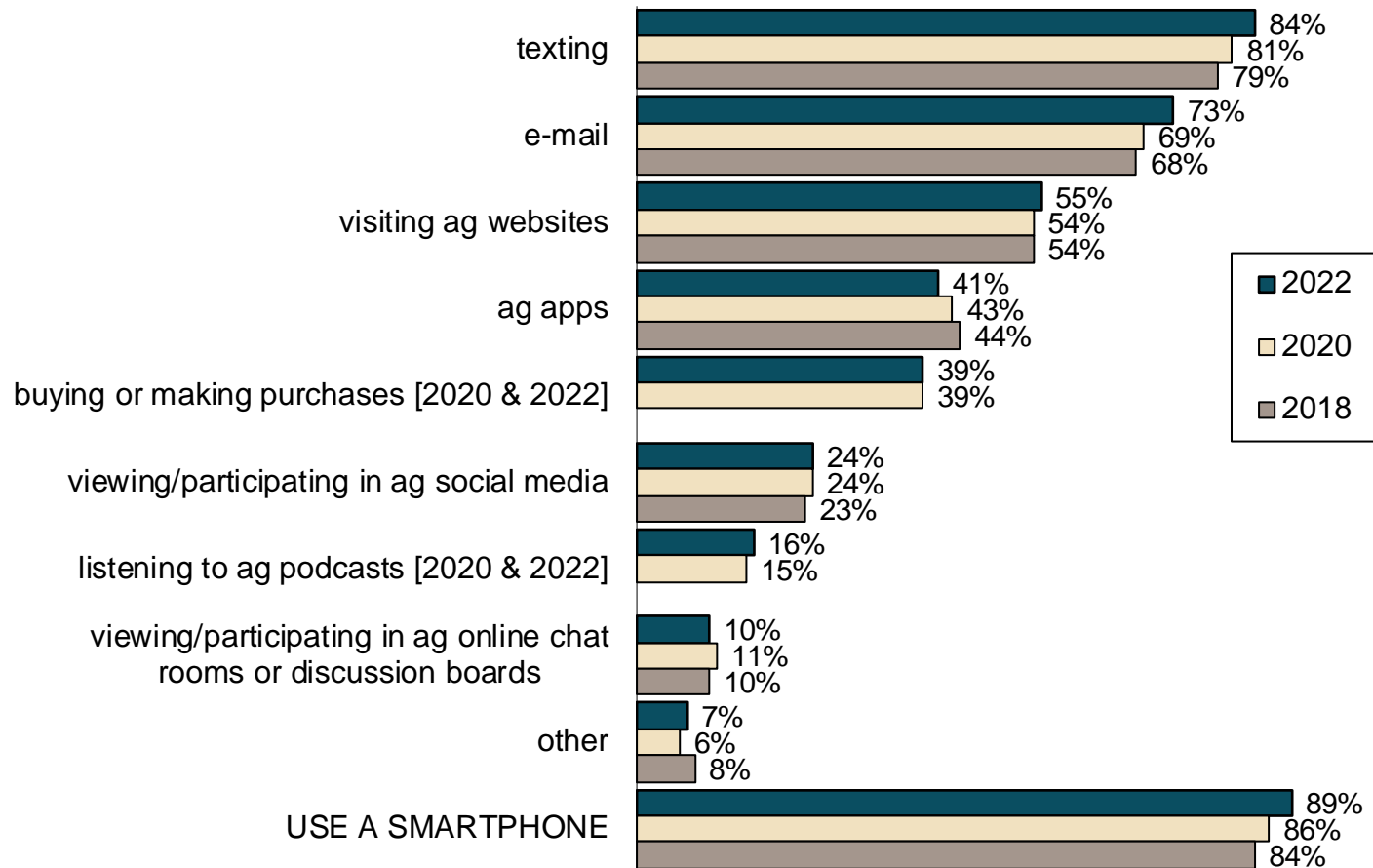


For what types of information do you (or would you) attend webinars?



A majority of operators (89%) use smartphones, including 55% who use them to visit ag websites—this has remained relatively consistent since 2018.

SMARTPHONE USES



For which of the following activities do you use a smartphone (iPhone, Samsung Galaxy, HTC One, etc.)?



Smartphone use tends to correlate with age. For example, 77% of those under 45 use a smartphone for visiting ag websites compared with only 43% among those 65 or older.

ACTIVITIES DONE ON SMARTPHONE	<45	45 - 64	65+
texting	92%	88%	77%
e-mail	86%	77%	64%
visiting ag websites	77%	60%	43%
ag apps	63%	47%	27%
buying or making purchases [2020 & 2022]	57%	42%	30%
viewing/participating in ag social media	52%	28%	13%
listening to ag podcasts [2020 & 2022]	36%	18%	10%
viewing/participating in ag online chat rooms or discussion boards	25%	10%	4%
other	6%	6%	8%
USE A SMARTPHONE	96%	92%	84%

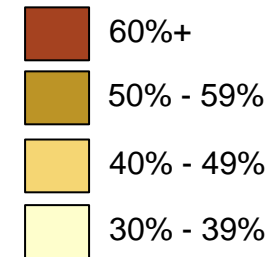
- 90%+
- 80% - 89%
- 60% - 79%
- 40% - 59%

For which of the following activities do you use a smartphone (iPhone, Samsung Galaxy, HTC One, etc.)?



More than half (59%) subscribe to video streaming services, with Netflix topping the list. Younger operators are more likely than those older to have streaming subscriptions.

VIDEO STREAMING SERVICE SUBSCRIPTIONS HELD	TOTAL	<45	45 - 64	65+
Netflix	35%	52%	39%	27%
Amazon Prime Video	34%	54%	36%	26%
YouTube	29%	36%	30%	26%
Hulu	15%	28%	17%	10%
Disney Plus	13%	33%	14%	6%
specific channel online service*	7%	10%	6%	7%
Sling TV	1%	1%	2%	1%
Fubu TV	1%	2%	1%	1%
other	3%	3%	3%	3%
AT LEAST ONE	59%	76%	63%	50%



*like HBO Max, ESPN+

Which video streaming service(s) do you subscribe to?



Key Contacts

- ◆ Nancy Batio, WATT Global Media - nbatio@WATTglobal.com
- ◆ Matt Herman, DTN / Progressive Farmer - matt.herman@dtn.com
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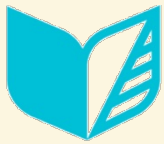


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