



Journal of Applied Communications

Volume 88 | Issue 4

Article 2

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Recommended Citation

Banning, Stephen A. and Evans, James F. (2004) "Counting Room Voices in the Farm Publisher-Reader-Advertiser Triad," *Journal of Applied Communications*: Vol. 88: Iss. 4. <https://doi.org/10.4148/1051-0834.1326>

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Abstract

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Abstract

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Business aspects of agricultural publishing lie at the heart of concerns about editorial independence of commercial farm publications in serving the vital food and agricultural sector of society. This perspective is not unique to agricultural publishing, of course, nor is it new.

“...the tendency of the times is to less independence than formerly,” George Whitaker of *New England Farmer* observed in 1902. “The changed conditions under which newspapers are published now tend to make the

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counting room the controlling center of the paper. Advertising must be secured if possible, large advertisers must not be offended." (Whitaker, 1902)

While concerns about editorial independence are not new, current dimensions of them seem pivotal for U.S. commercial farm periodicals (considered here as those directed to producers and supported financially by subscription income from readers and sale of advertising space). The issue is important because the hundreds of such periodicals provide a combined circulation of more than 18,600,000 per issue (Hedblad, 2004). They are widely recognized as valued sources of information for producers (e.g., Custer, 2003; Gallup, 2000; Banning & Evans, 2001).

Pressures on several fronts are intensifying concerns about not only the editorial independence of the commercial farm press, but also the financial health and well-being of it.

Concentration in agribusiness. Extensive shifts are occurring in industries on which commercial farm periodicals depend for most or all of their income. For example, the agricultural equipment sector is now dominated by a small number of transnational firms (Blandford, 2002). Concentration in the agricultural biotechnology industry has dramatically reshaped the seed and agricultural chemical sectors. More than 1,500 mergers, acquisitions, licenses, and other alliances took place in the agricultural biotechnology supply industry from 1981 to 1996 (Goldsmith, 2001). Between 1995 and 1998, six large multinational corporations acquired or entered into joint ventures with approximately 68 seed companies. By 1998 the four largest seed corn firms controlled 67% share of market, the four largest seed soybean firms 49% and the four largest seed cotton firms 87% (King, 2001).

Concentration in food production and marketing. The size of the reader base for farm periodicals has declined. Numbers of farms in the U.S. have dropped from 3,157,857 in 1964 to 2,128,982 in 2002 (U.S. Census of Agriculture, 1999 and 2004). Remaining farms and ranches have become larger and more specialized (MacDonald & Denbaly, 2000). For example, in 2001 the four largest pork-producing operations managed 46% of the nation's sow herd (Hendrickson & Heffernan, 2002). About one fourth of U.S. farms and ranches account for 90% of total farm production (Collins, 2000). In such a setting, firms that sell products and services to producers are using more personalized strategies. Approaches such as relationship marketing, online communications strategies, and direct mail challenge farm periodical advertising.

The markets into which farmers and ranchers sell their produce have also concentrated rapidly. In 2002, the four largest beef packers controlled 81% of the market, the four largest pork processors 59%, the four largest

broiler processors 50%, and the four largest soybean crushing firms 80% (Hendrickson & Heffernan, 2002). The five largest grocery retailers in the U.S. held an estimated 54% share of the market in 2003, up from 24% in 1997 (Hendrickson, 2003).

These persistent trends toward concentration “from gene to supermarket shelf” have intensified concerns about an array of negative effects on farm families and structures, rural communities, food supplies, the environment, and societies at large (e.g., Heffernan, 1999; Sexton, 2000; Kinsey, 2001; Harl, 2003; Berry, 1984; MacDonald & Denbaly, 2000).

Such trends also raise questions about how concentration within the new food economy leads to monopolized information and inadequate, inequitable access to information that producers need. (Kinsey, 2001; Bonnen, 1975; Evans, 1992; Hepp & Olson, 1980).

Concentration in commercial farm publishing. Consolidation in this sector is not expressed in numbers of periodicals. The number of U.S. commercial farm periodicals published in 2004 (390) is about the same as in 1970 (386) (Hedblad, 2004; Evans & Salcedo, 1974). Such findings might seem surprising in light of reduced numbers of farms. However, a 90-year analysis revealed that the number of farms has not been a major predictor of numbers of such periodicals (Evans & Salcedo, 1974).

Instead, concentration in agricultural publishing seems to be revealing itself most clearly in ownership structures. The U.S. magazine publishing industry generally shows relatively low levels of ownership concentration. A 13%-14% share of magazines published by multititle publishers in 1997 was about the same as in 1978 (Compaine & Gomery, 2000). However, within agricultural publishing, the 2004 Marketing Services Guide identified 20 “U.S. Print Units.” Each published up to 20 commercial farm periodicals. Together, they represented 142 periodicals, or 36% of the 390 U.S. total (AgriMarketing, 2004). A multinational publisher owned the largest unit.

Increasing concentration in ownership structures, intermingled with other kinds of concentration mentioned above, is generating varied concerns about agricultural publishing. Among them: survivability of periodicals; advertisers’ uses of market power; and effects of editorial staff cutbacks and consolidations of periodicals on editorial vigor, editorial independence, localized coverage, credibility and value to readers (e.g., Roth, 2002; Lehnert, 1991; Wall, 2003; Guebert, 2003; Hays & Reisner, 1990).

The Study

This study is the third in a series to examine power relationships among agricultural periodicals, readers, and advertisers. The series builds on the

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assumption that U.S. agriculture and society in general have an important stake in maintaining the vigor, health, and credibility of the commercial farm press. The series explores perceptions and relationships within the triad, with particular focus on the levels, kinds, and effects of advertiser influence on editorial content.

The triad approach involves a “contractualist model” in which “power requires mutual agreement by all parties—like players in a game, everyone must agree on the rules.” (Cunningham, 1999) Within the framework of social contract theory, this triad concept features power relationships based on mutual consent, pursuit of mutual benefits, and mutual options for departure. It places importance on all partners in the triad and, we believe, offers more promise than finger-pointing approaches this topic easily generates.

The first study in the series examined 10-year trends in views held by agricultural journalists (Banning & Evans, 2001). Findings suggested that agricultural journalists felt substantial and increasing pressures in their efforts to maintain editorial integrity. The 10-year comparison suggested that advertisers are becoming more aggressive in requesting editorial space and that journalists see agricultural publications catering more and more to advertisers.

The second study, among U.S. farmers and ranchers, revealed that the majority (59%) observed problems of advertiser influence on stories appearing in the farm periodicals they read. Also, a majority expressed concern about how this influence affects the information they receive (Banning & Evans, 2004).

This third study, closest to the publishing counting room, examines perceptions of agricultural publishers and advertisers in the triad. Literature about this subject would lead us to expect that publishers, like the journalists on their staffs, will be keenly aware of the dilemma between advertiser interests and editorial independence. They may tend to see more problems associated with the actions of other publications than of their own. Some may place strong emphasis on maintaining the “wall” between editorial and advertising while others may suggest that editors become involved with the advertising departments of their publications (e.g., Johnston, 2004; Autry, 1978; Chandler, 1904; *Farm, Stock and Home*, 1915).

Advertisers also might be expected to recognize the dilemma between advertiser interests and editorial independence. In this view of long tradition, perhaps most advertisers will see editors’ loyalty directed toward readers (Todd, 1920; Harrison, 1989). However, some advertisers, emphasizing mutual dependence and well-being, may encourage active cooperation.

Following are the research questions addressed in this study:

- RQ1: What are the major concerns of agricultural publishers and advertisers?
- RQ2: How credible are agricultural periodicals today in the eyes of publishers and advertisers, and what trends or concerns may be involved?
- RQ3: To what extent, if any, do publishers and advertisers believe agricultural periodicals have special obligations to maintain editorial independence?
- RQ4: To what extent, if any, do publishers and advertisers believe advertisers are attempting to influence editorial content?
- RQ5: To what extent, if any, do publishers and advertisers believe readers are concerned about advertiser influence on editorial content?

Methods

Earlier studies in this series used survey methodologies; however, qualitative research can reveal information that researchers might not think to ask. Qualitative interviews, therefore, were used to unearth a deeper level of information. Publishing and advertising executives were also considered more responsive to personal interviews than to surveys.

A protocol of mostly open-ended questions was designed, based on a bank of questions used in earlier surveys (Hays & Reisner, 1990; Banning & Evans, 2001; Banning & Evans, 2004). These had evolved from previous research about journalistic credibility (Mills, 1983).

Publications were selected on the basis of their representation of the industry, for instance both free circulation and subscription-based publications were chosen. Larger and smaller publishing units were selected so that both single media publishers and multiple media publishers could voice their opinions.

Specifically, the seven publishers interviewed represented commercial farm periodicals of varied circulation, geographic coverage, and subject emphases. Some publishers were responsible for individual titles, some for groups of titles. The interviewed publishers are, or have been, prominent in national organizations representing agricultural publishing. The three advertisers interviewed represented marketing firms of varied size, enterprise, and market focus, from regional to international.

Interviews were conducted in person and by telephone. In the interest of consistency, one researcher conducted all interviews, which lasted 20 to 90 minutes each. In keeping with traditional methods of qualitative research,

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the interviews were tape-recorded and later transcribed. The transcriptions were scrutinized for trends and themes among interviews. The findings were organized within the framework of the research questions. In the results that follow, quotes are used to illustrate the constructs and patterns.

Results

Views of publishers. All publisher respondents cited industry consolidation as their top concern. For example, Publisher A, publisher of a broad-scoped subscription magazine considered one of the nation's top agricultural periodicals, noted: "[The major concern] is consolidation of farmers, advertisers, and publishers. When two advertisers merge, you would think their advertising spending would be one plus one equals two. In reality, the advertising spending is one plus one equals point seven."

Publisher B, who leads a company that publishes more than six major agricultural producer journals with international distribution, echoed this sentiment: "To me, looking at a more broad context, one [concern] is the consolidating advertising base..." Publisher B went on to express a further concern about the consolidation of readers.

Publisher C noted: "It affects the publishing industry because the primary revenue source for most farm magazines is advertising. So as your reader base goes down, you have fewer readers on which to predicate your advertising. The other major concern is there are a growing number of ways to communicate with a potential buyer or farmer. You've got the Internet, and you've got a variety of ways other than print advertising and few publications and very few start-ups."

One serendipitous finding was that some agricultural publishers are adding services to protect themselves from recessions within one area. Four publishers volunteered a view that diversification is the answer to consolidation. Publisher C observed: "They [publishers] have to diversify their revenue streams. I think the total budget that advertisers are spending is as large or larger now than it's ever been. It's just that they don't have to use print as much as they used to, because they're diverting money to all of these other methods and even custom publishing...and there seems to be a crying need for selectivity." The means of serving advertisers could run the gamut "from display advertising, from the trade show business, the seminar business, the electronic newsletter business, [and] search engine words [that] an advertiser wants to buy a word from a search engine to come up with leads to sell his product. Publishers are going to need to buy every single avenue of delivery to the readers."

Publisher B also saw diversification as vital to survival, noting: "...they are shifting a lot more dollars over to the direct or customer relationship." Publisher D suggested: "We have to be very targeted" and "offer multiple ways to reach those audiences by publication and by Internet site and by direct marketing opportunities." No publishers emphasized strategies such as increased subscription revenue from readers or broadened circulation demographics, perhaps because such strategies fail to fit advertisers' interest in focused, specified reader profiles.

Dependence on fewer agricultural advertisers means greater pressure on publishers, a matter related to the research question about editorial credibility of farm periodicals.

The publishers generally considered credibility to be high. Some felt it is high and will stay high, while others felt it is high, but not quite as high as in past years. Publisher E, who heads a company that publishes several agricultural magazines, noted: "We're not seeing any indication that the credibility of farm publications has fallen. It's always been top of the charts. The most preferred medium the farmers use. And I think the credibility of that goes along with the preference. They wouldn't prefer it if it wasn't credible..."

One publisher suggested credibility for subscription-based publications is higher than for publications supported entirely by advertising, noting: "I think if they [the readers] get a free magazine they think, 'I'm going to get a snow job here. If I'm paying for a magazine, I expect it to be a little more critical, [to get an] unbiased viewpoint.'"

Publisher C, a publisher primarily of free circulation journals, felt credibility of agricultural journals in general has gone up, noting: "I would say it's increasing. I think any publisher that is in business today has to do constant research to see what the readers need to read about. You have to continue to develop editorial content...[and] it appears the value of the print advertising is still very high among readers." Publisher A agreed: "Farm publications have as high credibility as ever, studies show."

Publisher F was less optimistic: "I actually see it decreasing. They [readers] are so much more sophisticated. I don't see the readers getting what they need out of the publication. Some of the publications that are out there, they need to be...they need to provide guidance. And they can do that by telling what the situation really is, and not what they think they [readers] want them to hear. I think that strengthens the bond between the reader and the publication."

Publishers agreed that producers feel agricultural publications are extremely important. Several suggested that readers find agricultural

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publications more important now than in the past because new agricultural technology demands continual education. Publisher A suggested: "There is more reliance on industry information. There is less information coming from university extension, and the industry has credibility. There's a need for technical information, and industry is one place that has it. The readers want technical information now more than ever."

Echoing this sentiment about the commercial farm periodical, Publisher B observed: "It stimulates thoughts. It stimulates ideas, new ideas, some new perspectives, and it still is a very convenient, comfortable, and familiar medium of context to deal with. I say it is at least equal to what it has ever been and potentially in light of the competitive market place for information [that is on] all of the Internet and so forth. I think, relatively, one can say that it is stronger than it's ever been, because even in a base of those challenges, the producer, the farmer, still looks at the print medium as still his most reliable source."

The emotions publishers expressed about the importance of credibility ranged from firm to adamant. Some publishers not only saw it as vital to their businesses, but also held it as a personal value, indicating their magazines' credibility was important to their self-image.

Publisher B noted: "I think there are a lot of publishers that have been slow to recognize and understand their audience and market. The audience is the market. The advertisers are out there and that's who pays the bills, but the fact of the matter is, the reader is our audience and our market. If we don't serve them very effectively, we have no platform."

Regardless of how credible publishers saw the farm periodical industry, they universally saw their readers as shrewd and cynical of publications in general. Publisher A said readers constantly scrutinize the periodicals for conflicts of interest and often write to complain of alleged abuses, often when none exists. Several publishers spontaneously laughed when this subject came up, finding humor in the idea readers might be duped by conflicts of interest.

Publisher A noted: "The readers know if a publisher is trying to sell them something. The publisher might as well put it in red letters and say it's an ad because they're not going to get it past the reader." Publisher E also felt readers are cynical, observing: "But aren't we all? We've all been subjected to virtually every possible message and advertising idea out there."

Publisher F noted: "Farmers are getting smarter when they can read between the lines and say, 'Well, that's just an advertisement for that company.' I don't think you can pull one over on them like that." Publisher D

agreed: "I think they can [tell when editorial matter is influenced]. I think they do, and I think they speak out when...they perceive that's occurring."

Publishers universally acknowledged pressures from advertisers. Publisher A noted: "There are pressures from advertisers. However, they're no worse than before. There have always been pressures. The reporter who's been working five years may think it's terrible, but if you're like me and have been working 40 years, you know it's always been like this."

Publisher E agreed: "Yes. We do have some of that. You get some input from advertisers. Those not very sophisticated, those not very knowledgeable, those new to the industry. You get some of that influence. Some of those questions from people not very good at what they do.... But you know, it's not a lot. But you do get someone who does try to throw you an offer-you-can't-refuse type of thing. But you have to be strong enough to say if this idea's really newsworthy, fine. We'll do the story regardless of what advertising may do with us."

Publisher C's view was similar: "There's always [advertiser] pressure. The question is how you deal with it [he laughs].... We have people who come to us and say, 'If you write on this particular product, we'll run an ad.' We say, 'We can't do that.' On the other hand, if there is a plant that we can do a plant article on, and your equipment is part of the plant, it's part of the photograph."

Publisher F explained: "Oh yeah [laughs], I think that's been going on for a long time. And it's up to the publication to toe the line. I think there are publications that come up with special projects for advertisers. They [advertisers] want to be in a certain kind of content, say animal identification, so some publications may come up with content such as that. But that doesn't necessarily mean the editorial is written by or influenced by the advertisers."

Publisher G saw advertiser pressure as natural: "I think it's only natural that someone who has something they're trying to get in the marketplace to have it presented in its best light."

However, publishers said they draw a line between feeling the pressure and giving in to it. Publisher B explained: "If you don't feel like saying 'No' to somebody, if you don't have some confidence, you probably don't want to get into...trade publishing.... You need to go some place else. Because it's not necessarily a business for lightweights. It's not an easy business." Publisher A summarized it simply: "Of course, there are big advertisers who carry a big club. But most of them don't take the short view.... There will always be pressures."

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While publishers said maintaining proper editorial distance in content is important, most endorsed contact between advertisers and their editorial staff. Publisher F said: "I do think that there's an active role that editorial people can play in the process and that doesn't mean selling out or pleasing advertisers.... We have editorial people that go out with sales people on a call. We're not crossing that line, and advertisers recognize that. They appreciate that they can have a little face time with the editor. I think there should be some of that going on."

Publisher G made a similar case: "Our editors are encouraged to have strong relationships with our advertisers, to know what they're doing... advances in technology... to take that to our readers, and that helps the readers." Publisher G explained: "I think we see our mission is to help serve the readers, [but] serving the reader and serving the advertiser are not mutually exclusive. I think a creative publisher can find ways to do both."

From their perspective, they can control how they respond to editorial pressures from advertisers. To them, advertiser consolidation appears less controllable and more ominous.

Views of advertisers. Advertisers expressed concerns similar to those of publishers, yet with a different focus. All respondents cited consolidation as their major concern. However, none expressed concern about effects of the consolidation of advertisers. Advertiser A cited concern about consolidation in numbers of readers, noting: "We have a smaller group of people to talk to and every year it gets smaller and smaller." Advertiser A also expressed concerns about the number of farm periodicals, but not about their survival. "We have too many publications," he noted. "...There are just so many of them that say the same stuff. So, which magazines and newspapers? Which ones you go into to hit the right people at the right time? And what will be they be reading?"

Advertiser B also saw the consolidation of publications, a thinning of the herd, as positive, explaining: "There is less media, less publication in the industry, though I think they are a little more focused." Advertiser C noted that the trend to fewer pages in publications had influenced how his company deals with publications. He said: "We are more cautious. We are more selective."

This does not conflict with the publishers' views, just their concerns. Publishers are well aware that there is more competition. Publisher C noted: "I do think the ag industry as such will probably continue to diminish in terms of readers, probably advertisers and probably in magazines. There will probably be fewer ag magazines ten years from now than there are now, but if you start to look at any given market...at any niche market, if it's a

four-book [magazine] field...the odds are that the...number four book is going to be under pressure to compete with number one and number two. So the rule of thumb is in any particular market, you really need to be in the number one or two positions in market share to survive...[for] the economics of it you just have to be good at what you're doing."

All of the advertisers saw editorial credibility as important. However, one advertiser felt readers are unaware when advertising influence is inserted into editorial matter and, therefore, such influence is a justifiable means of getting the advertiser's message out.

Advertisers uniformly felt editors should not shy away from contact with advertisers. Some advertisers interpreted refusal of contact as a sign of arrogance among editors. Such advertisers would like to go beyond just placing the advertisement and instead move toward a concept of partnership between publications and advertisers. They said they were more likely to work with periodicals that partner with them in joint efforts such as seminars and tours.

However, different advertisers drew the line at different places. Advertiser B, said his company had paid for editorials in the past, in certain situations. Advertiser C said publishers have gotten closer to advertisers in the last few years: "They're offering more value-added services rather than just trying to solicit advertising, [offering] frequency and those kinds of things...things like future terms...and in talking to their customers when they do editorials and sharing those types of ideas with us." Some advertisers said they consider additional services from publishers as the most important trend of the future. They cited services such as supplying mailing lists and consulting.

Conclusions

Publishers and advertisers in this study identified consolidation as a major concern but focused on different sectors. Publishers uniformly expressed concerns about consolidation among readers, advertisers and publications. Advertiser consolidation, in particular, appears to leave publishers feeling uncertain about future directions and financial impacts. They reported trying to adjust through diversification of services to readers and advertisers. Advertisers emphasized concerns about reduced numbers of producer readers, but not about consolidation among advertisers or farm periodicals. In fact, they expressed support for a reduction in the number of farm periodicals. All three kinds of consolidation have the effect of putting the advertiser in a more powerful position within the reader-publication-advertiser triad.

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Publishers in this study seemed in tune with recent research indicating that farm readers feel editorial credibility is extremely important. The publishers viewed it as a bottom line item. To a person, they saw editorial credibility as a moneymaker for their publications and lack of it a potential source of financial ruin. Advertisers also expressed support for maintaining high credibility in farm periodicals, based on editorial independence.

Both the publishers and advertisers acknowledged advertising-related pressures of various kinds to influence editorial content. However, these interviews revealed interactions beyond those involving editorial content. Some publishers and advertisers said they see additional services and interactions as the most important trend of the future. They cited shared mailing lists, joint seminars and tours, and other kinds of collaborations. Only two publishers expressed concern that closer relationships might affect reader credibility; these publishers represented magazines financed by subscription income as well as advertising income.

Publishers and advertisers shared a feeling that advertising-related pressures should not influence the independent stance and credibility of editorial material. Publishers, in particular, emphasized the difference between feeling advertiser-related pressure and giving in to it. They generally expressed confidence that they hold control over how they respond to such pressure through their editorial policies. Within that context, they seemed open to endorsing contact between advertisers and their editorial staffs. Advertisers said they desire more contact.

Most of the publishers and advertisers in this study viewed readers as generally aware of advertiser pressure on editorial content and shrewd enough to factor it into what they read.

Findings of this study help reveal the kinds and origins of forces exerting pressures on all partners in the triad and provide a staging point for interactions and understandings among the partners. Results identify editorial credibility as a promising centerpiece for discussions and decision-making. All partners said they value it highly. It provides the foundation on which publishers can help their staff members deal with increasing advertising-related pressures through clear, firm policies on editorial integrity. It also provides a shared base upon which publishers and advertisers can and should articulate their relationships more clearly to readers.

Findings of this study also identify some ways in which publishers and advertisers are using new information technologies and diversification methods during a period of great change.

About the Authors

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