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2006 CANADIAN WHEAT BOARD ANNUAL PRODUCERS' SURVEY

Final Report

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Prepared by:

Innovative Research Group, Inc. | www.innovativeresearch.ca

Toronto Office
350 Bay Street,
3rd Floor
Toronto, ON
M5H 2S6

Vancouver Office
1055 West Hastings Street,
3rd Floor
Vancouver, B.C.
V6E 2E9



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Executive Summary

Overview

Innovative Research Group Inc. (INNOVATIVE) is pleased to provide the Canadian Wheat Board with the results of the ninth annual producers' survey.

For this survey, a total of 1,303 CWB permit book holders were asked to complete a 30-minute interview. The survey was conducted through eNRG's Winnipeg telephone centre between March 15 and April 2, 2006. Interviews were completed with 401 permit holders in Alberta, 601 in Saskatchewan, and 301 in Manitoba. Results are weighted to represent permit book holdings by province. The overall margin of error is 2.72%, 19 times out of 20.

Key Findings

1. Farmers see a bad time getting worse

Whether they look at their own prospects or the prospects for the industry as a whole, most farmers share a pessimistic view of where things are and where they are going:

- 84% say agriculture is on the wrong track
- 80% feel more pessimistic this year than last year
- 70% expect to lose money this year
- 58% say they will be out of farming soon, some even this year, if things don't change
- Farm inputs top the list of concerns with the price of other grains jumping twelve points this year to edge out the price of wheat for second

2. CWB is gaining support; current support is stronger in intensity

On a wide array of measures, grain producers indicate they support the CWB.

- 76% say all things considered they support the CWB
- The CWB is building positive momentum with 39% saying they have a more favourable impression compared to two years ago while just 17% say they have a less favourable view
- 71% say the CWB is at least somewhat close to their views
- 64% say they are against anything that would weaken the CWB.
- 74% oppose disbanding the CWB and leaving the marketing of Canadian wheat to private grain companies.



3. Producers remain divided on market options

Not much has changed when it comes to producer attitudes to dual marketing on wheat:

- When dual marketing is offered as an option, 45% chose having the CWB as the sole marketer, 47% prefer dual marketing and just 7% want an open market.
- Given a head-to-head choice between open markets and single desk for wheat marketing, 63% chose having the CWB as the sole marketer while 30% chose an open market.
- Support for the dual market is driven by a desire for more control and flexibility and a belief that a dual market for wheat would not mean the end of the CWB.

Opinion on barley is also similar to last year:

- Opinion is a bit more polarized in the three options scenario with 29% of grain producers saying they would like to see the CWB as the sole marketer of barley (up five points from last year), just under half prefer dual marketing (46%), and 19% want an open market (up 3 points from last year).
- There is no change on the two option question with farmers virtually evenly divided between having the CWB as the sole marketer (45%) and an open market (46%).

4. There is broad support for an activist Canadian Wheat Board

Whether in regards to advocacy or adding value, farmers in general support initiatives that would broaden the CWB's efforts and oppose initiatives that would narrow its focus.

- Farmers support initiatives that will help capture value up and down the value chain.
- There is support for joint ventures in processing facilities here and abroad as well as for new marketing initiatives.
- There is support for CWB including more grains in its marketing efforts.
- There is strong support for initiatives that could help contain costs including investments in transportation, storage and handling facilities as well as bulk buying of inputs.
- There is very strong support for the CWB to speak out more actively on behalf of farmers.

5. Farmers want the final say on major changes

If there are major changes to the CWB, farmers want the final word.

- When it comes to making major decisions or structural changes to the CWB, 75% of respondents would prefer to use a plebiscite, while only one in eight would have elected directors (13%) resolve the issue. A decision by the federal government to make major changes was even less favoured (8%).
- Consistent with that view, 88% agree any decision to end the single desk should be made by farmers, not the federal government.



1. Introduction

Research Objectives

The Canadian Wheat Board has conducted an Annual Producer's survey for the past nine years in order to evaluate CWB performance and identify producer opinions on key issues facing the CWB.

Core tracking elements include:

- General mood and agricultural outlook
- Performance of the CWB
- Assessments of key stakeholders
- Marketing options

Current issues that were pursued in this year's survey included:

- Assessments of potential CWB business initiatives
- Awareness of key WTO developments and attitudes towards compensation
- Awareness and interest in new CWB marketing options
- Governance issues

Research Design

The 2006 Annual Producers' Survey was a telephone survey of 1,303 farmers selected randomly from among the CWB's Permit book holders. The 30 minute interviews were conducted through eNRG's Winnipeg telephone centre between March 15th and April 2nd.

The sample was broken into regional quotas as noted in the table below:

Province	Sample Size	Margin of error
Alberta	401	+/- 4.9%, 19 times out of 20
Saskatchewan	601	+/- 4.0%, 19 times out of 20
Manitoba	301	+/- 5.7%, 19 times out of 20
All respondents	1303	+/- 2.7%, 19 times out of 20

The results were then weighted to reflect the actual proportion of permitted holders from each province; 26% in Alberta, 60% in Saskatchewan and 15% in Manitoba.

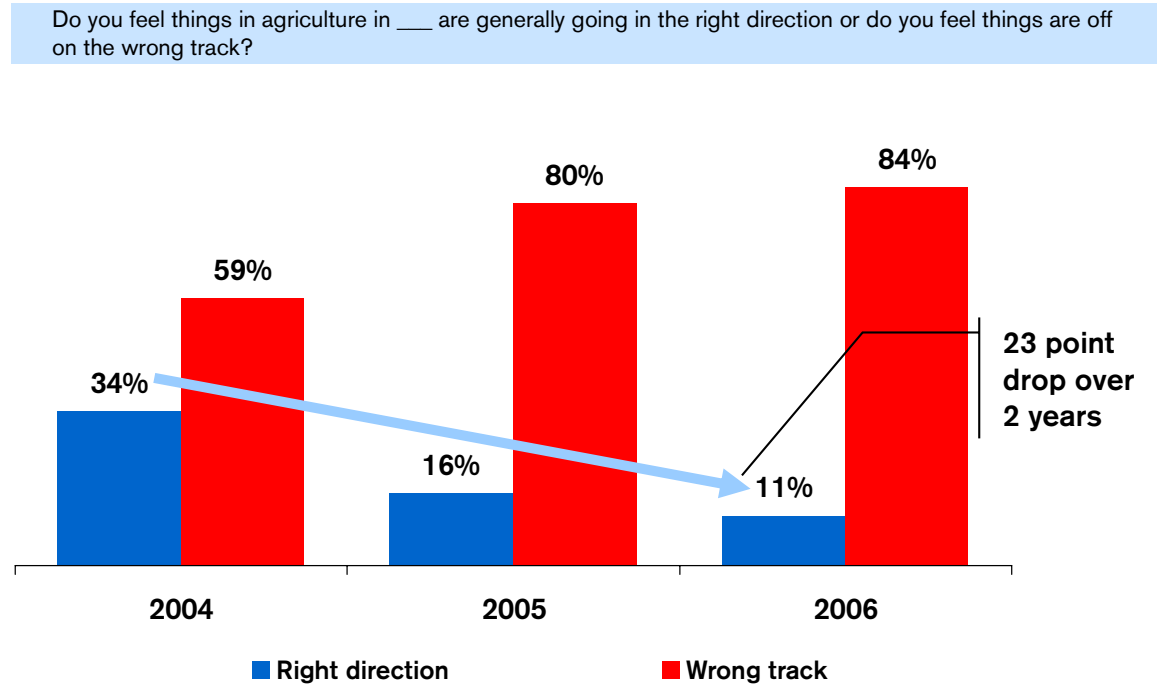
Please note that some graphs may not always total 100% due to rounding values rather than any error in data or because don't know and refused responses are omitted.



2. General Mood and Agricultural Outlook

Pessimism growing among grain producers

Feelings that agriculture in the respondents' provinces is off on the wrong track have grown by 25 percentage points over the past two years.

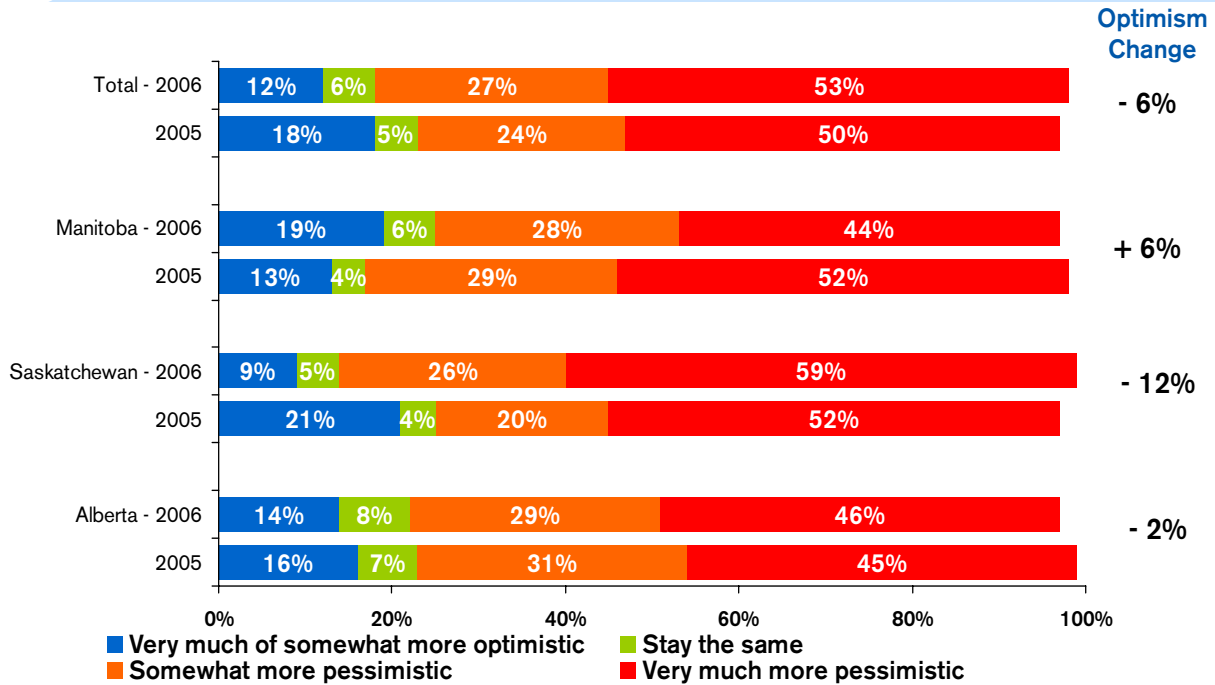


Farmers are generally pessimistic across the Prairies, and are most pessimistic in Saskatchewan, where 86% say things are on the wrong track, compared to 81% in Alberta and 79% in Manitoba.

Farmers feel much more pessimistic than last year

Grain producers feel even more pessimistic than the tracking indicates. Over half of producers surveyed say they feel *much* more pessimistic than last year.

Q In your opinion, is the outlook for farming for this year more optimistic or more pessimistic than last year?



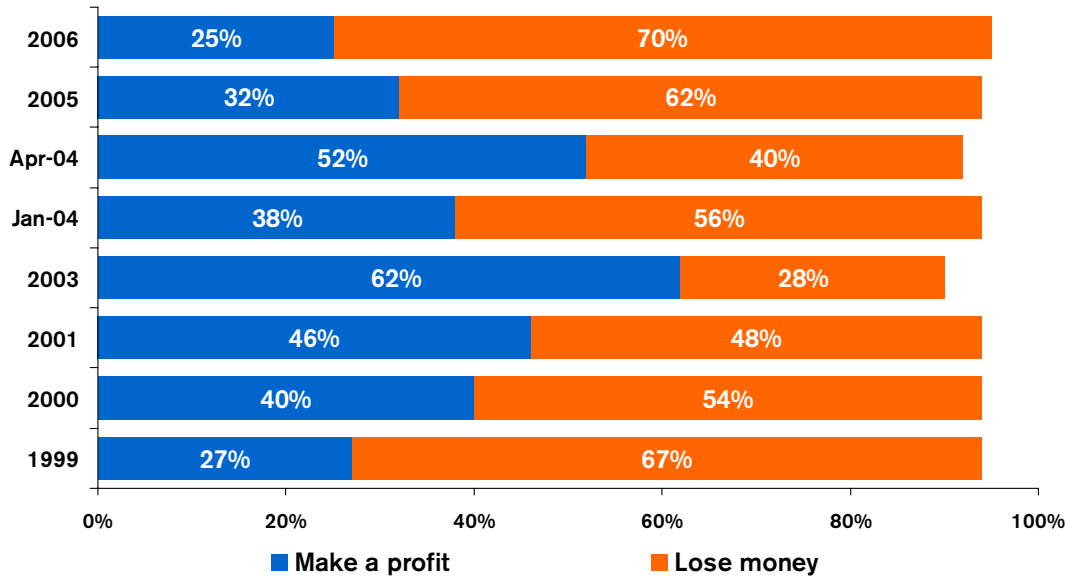
This feeling is particularly strong in Saskatchewan where the number who report feeling more pessimistic than last year is up by twelve percentage points. Saskatchewan’s negative trend is partially offset by a decline in perceived pessimism in Manitoba. However, while those who feel they are more pessimistic than last year has declined six percentage points in Manitoba, there are still over 70% who feel more pessimistic.

Alberta has actually held stable year by year with 75% feeling more pessimistic this year compared to 76% last year.

New high in number of producers who expect to lose money

Seven in ten producers surveyed expect to lose money this year, the highest number reported since CWB began tracking this number in 1999.

Q There has been much discussion about the financial position of farmers in western Canada. I want to get a bit of information on how circumstances have affected you personally.
Do you expect your farm operation to make a profit this year or will it lose money?

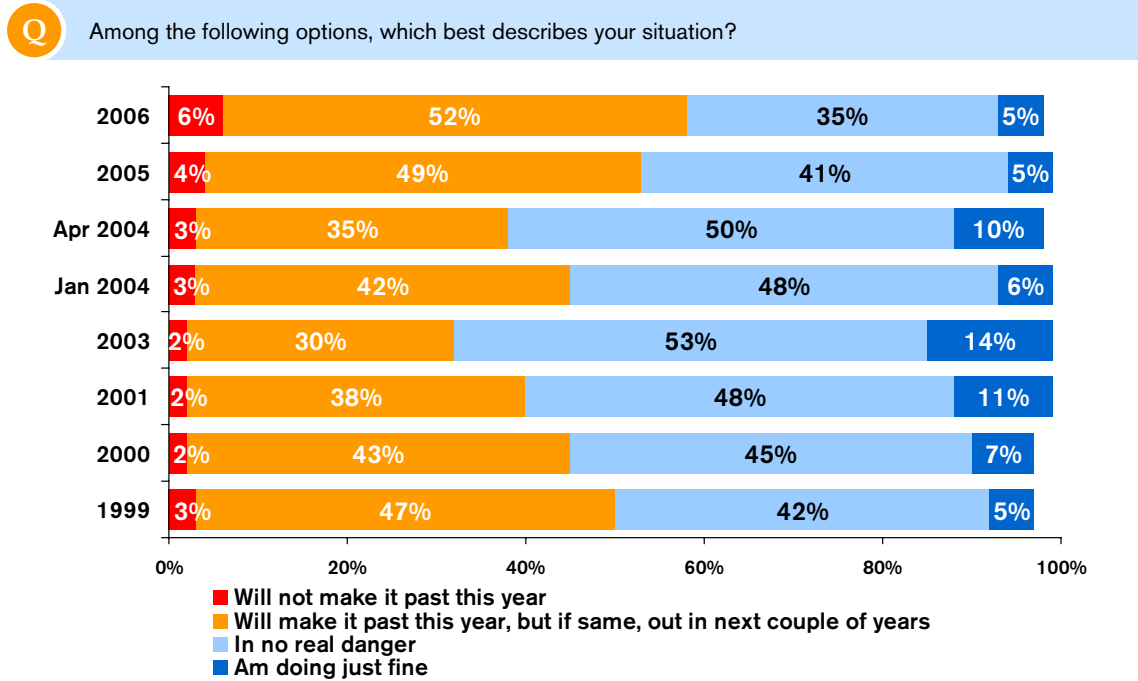


Note: Don't Know / Refused not shown

Province has a significant impact on this question. Almost three out of four (74%) farmers in Saskatchewan expect to lose money compared to 64% in Manitoba and 63% in Alberta.

Another new high in farmers who say they will be out of business

Well over half the producers surveyed say they cannot make it past this year (6%) or that they will be out of farming if the next few years remain the same (52%).



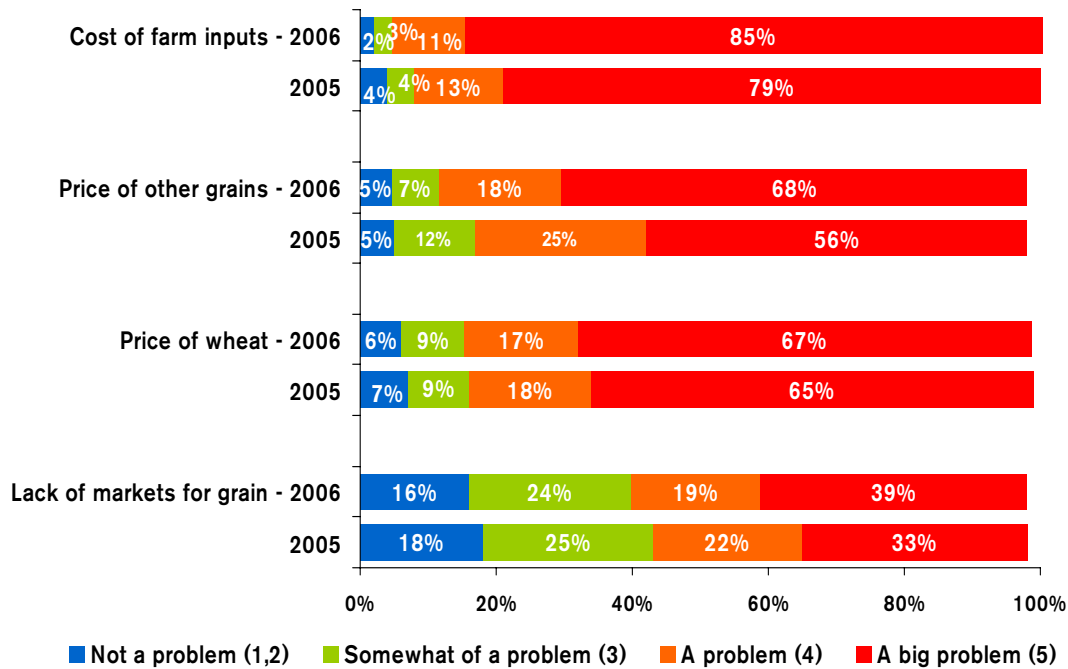
Alberta farmers are the most likely to say they are doing fine (7%) and that while they may not be making all the money they would like, they are in no danger of going out of business (42%).

The only real difference between Manitoba and Saskatchewan grain producers is that those in Saskatchewan are more likely to say they will not make it past this year than those in Manitoba (7% in Saskatchewan, 3% in Manitoba).

Cost of farm inputs tops list of problems

The cost of farm inputs remains the most serious problem facing farmers with 85% saying farm inputs are a big problem, up six points from 2005.

Q On a scale of one to five, where one means not a problem at all and five means a big problem, how much of a problem will each of the following be for your farm in the coming year?

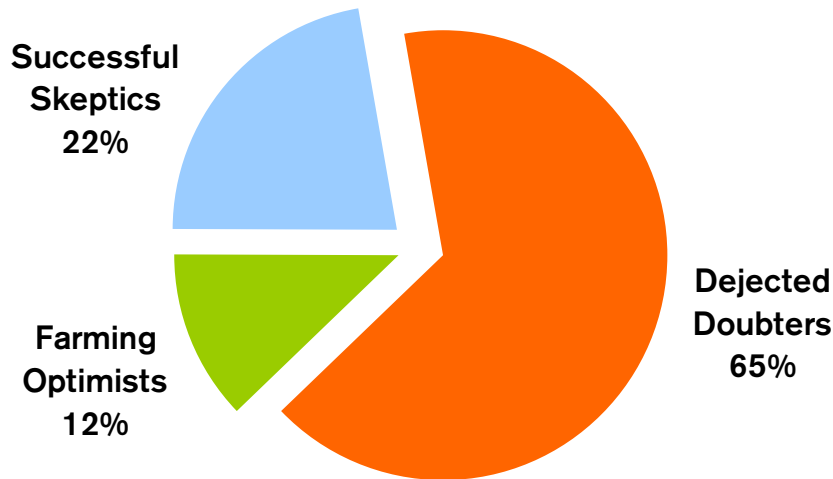


The price of other grains has shown the biggest year over year increase rising twelve percentage points to 68% this year, edging out the price of wheat as the second biggest problem. However the price of wheat remains a significant concern with 67% saying it is a big problem.

While a lack of markets for grain trails far behind the other issues as a concern, the number of farmers who rate it as a big problem is up six percentage points, growing to 39% this year.

Deeply negative pattern is evident across outlook questions

Innovative Research Group combined farmers' responses to the mood and outlook questions to provide segmentation based on farmers' general orientations.



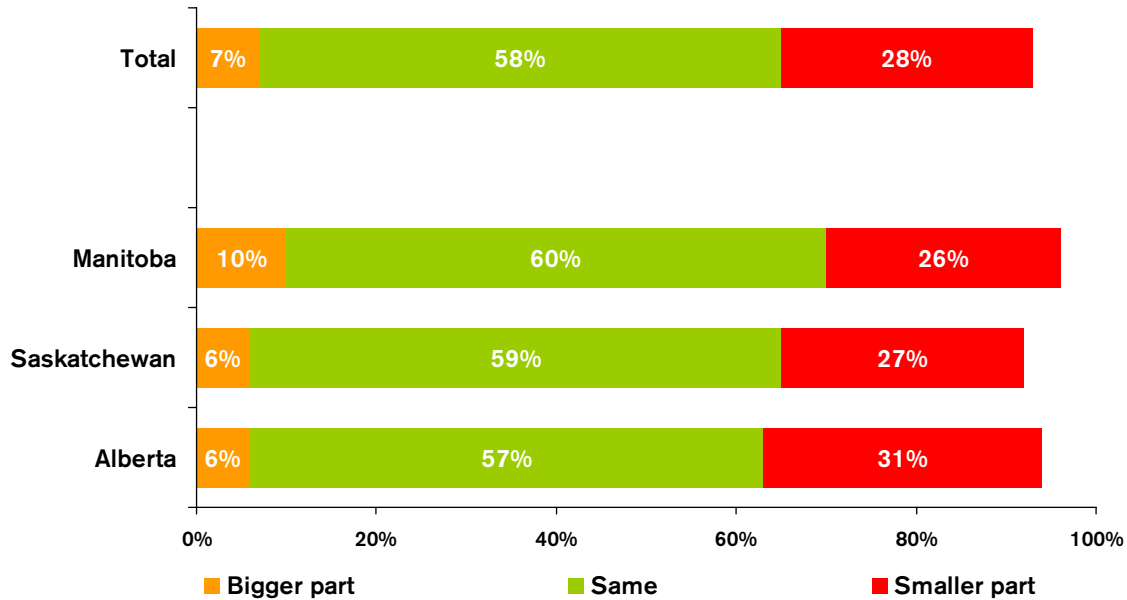
Almost two thirds of grain producers fall into the 'Dejected Doubters' category. These are farmers who think times are tough and getting worse, expect to lose money this year and see hardship in the future. Just over one in five farmers (22%) fall into the 'Successful Skeptics' category. While they expect to make money, they see hard times ahead for the sector as a whole. Just over one in ten producers is a 'Farming Optimist'. While these Optimists say agriculture is headed in the right direction and expect to make money, at least in years to come, even they believe farming is beset with serious problems.

	Farming Optimists	Successful Skeptics	Dejected Doubters
General Agricultural Mood	Going in Right Direction	Wrong Direction	Wrong Direction
Farming Outlook	Least Pessimistic	Generally Pessimistic	Bleak
Market Situation	Problems	Big Problems	Big Problems
Financial Situation	Stable / Optimistic about Future	Profitable / Good Future	Financial Hardship / Unpromising Future

Despite gloomy outlook, most expect to maintain relative priority of CWB grains in their operations

Farmers remain tenaciously committed to producing grain despite their negative views on the future.

Q Five years from now, do you see CWB grains as a bigger part of your business than now, about the same as now, as a smaller part of your business than now, or about the same as now?

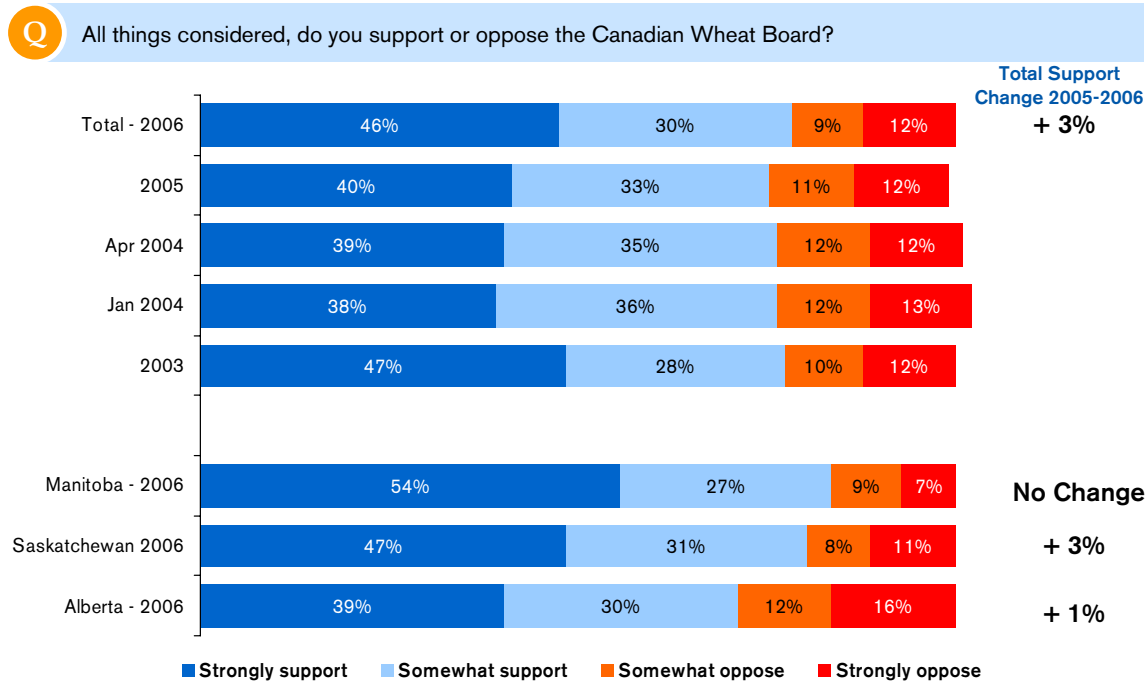


Less than three out of ten farmers (28%) expect to reduce the share of CWB grains within their business. Alberta farmers are the most likely to say they intend to reduce their exposure to grains but in all three provinces, a strong majority expect to maintain or even increase the importance of CWB grain in their farm operations.

3. Canadian Wheat Board Performance

Intensity growing among CWB supporters

Once again, most farmers say they support the Canadian Wheat Board.



At 76%, overall support for the CWB is up three points over last year. Strong support for the CWB has moved from 40% to 46%.

At 81% Manitobans are the most likely to indicate support for the CWB. In fact, 65% of Manitoba producers strongly support the CWB.

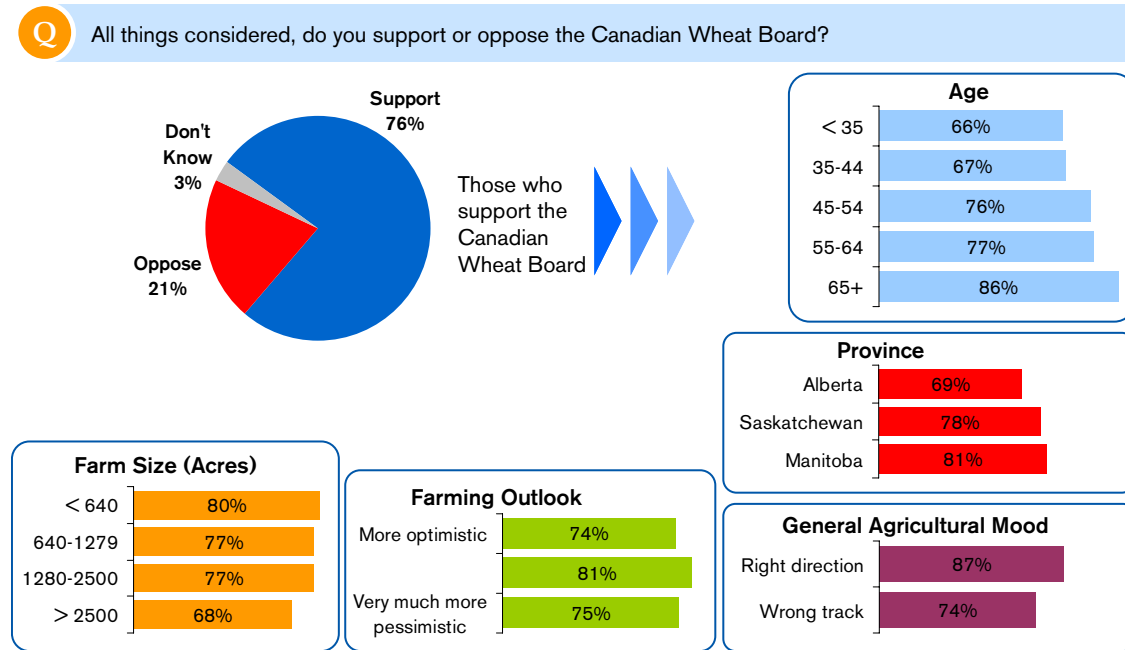
Saskatchewan support for the CWB is just 3 points lower than Manitoba with 78% overall support and 47% strong support.

While Alberta producers are the least supportive, even in Alberta more than two in three (69%) support the CWB. There are more strong supporters (39%) in Alberta than the total number opposed (28%).



Support for the CWB is strong among all groups of farmers

The chart below shows the percentage of support for the Canadian Wheat Board by key farming segments. Support is no less than 66% across all key farming segments.



Support grows with age but even among the youngest farmers the CWB enjoys two thirds support.

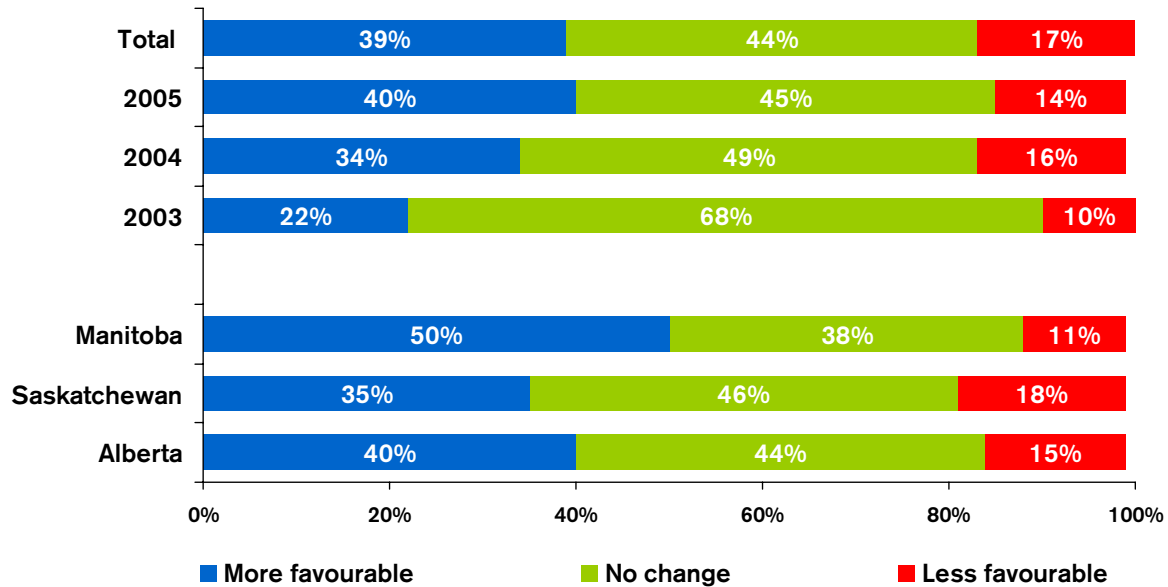
Those who believe farming is headed in the right direction are more supportive (87%) than those who say it is off on the wrong track (74% support for CWB) although farming outlook has no consistent impact.

Smaller operations are more supportive than larger operations, but even among operations over 2500 acres, the CWB enjoys 68% support.

Trend in Impressions of the CWB remains steady

The CWB continues to maintain positive momentum in its image, although the net improvement is down slightly from last year.

Q Which of the following best describes your impression of the Canadian Wheat Board compared to two years ago?



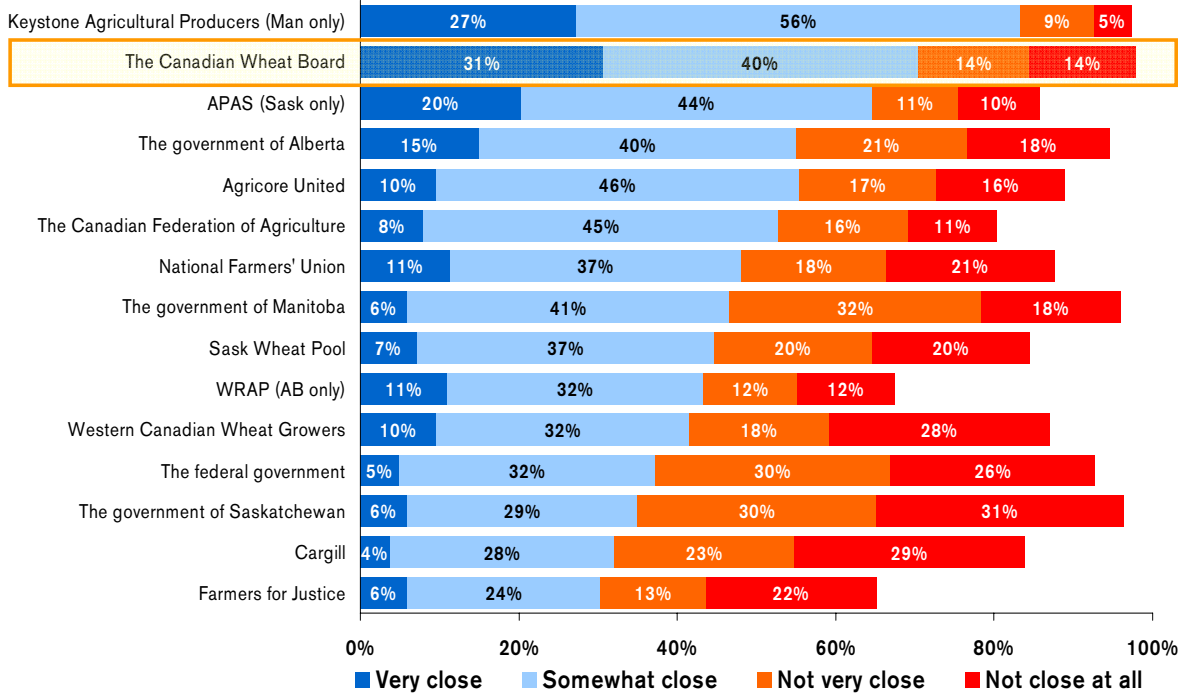
This year 39% of producers say they have a more favourable impression of the CWB compared to 17% who have a less favourable impression. Subtracting the less favourable from the more favourable leaves the CWB with a +22 net favourable gain. Last year the net favourable impact was even higher at +26.

The CWB is enjoying the greatest momentum in Manitoba where the net impact is +39. This is one of the few questions where Alberta, with a net impact of +25, scores higher than Saskatchewan with a net impact of +17.

CWB seen as close to farmers' views

The CWB has the second most powerful brand out of 15 of the organizations that were tested in terms of sharing the views of farmers.

Q On the farming issues most important to you, how close are the views of the following to your own – very close, somewhat close, not very or not close at all?



Just over seven out of ten producers say that the Canadian Wheat Board is somewhat or very close to their views. The CWB tops the list when it comes to very close rankings. There has been a sharp increase in intensity compared to last year.

In our experience, it is unusual for a government mandated organization to rival voluntary membership advocacy organizations on such a measure.

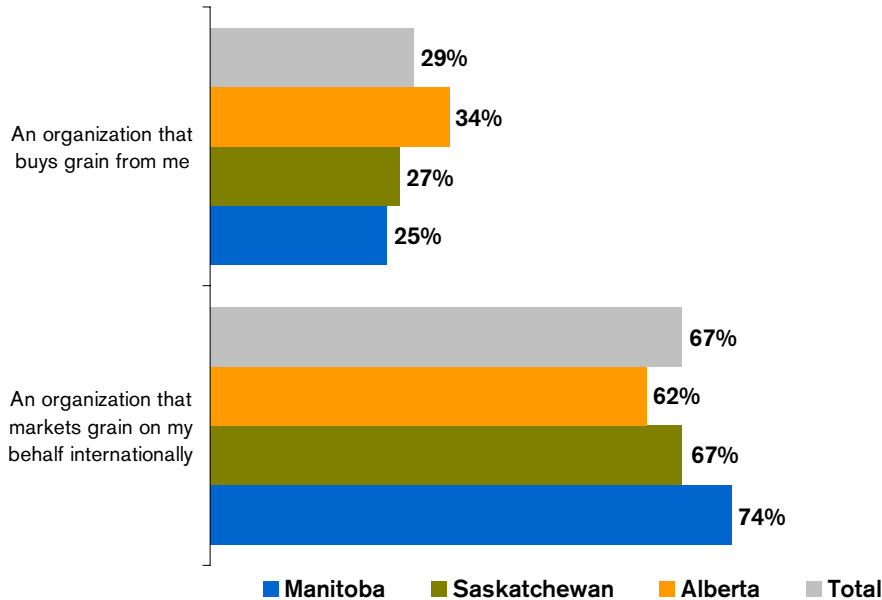
Once again, Manitoba farmers provide the most favourable scores with 79% saying the CWB is somewhat or very close to their views. Saskatchewan farmers are about average with 71% support. Even in Alberta, more than six out of ten (63%) permit book holders say the CWB is close to their views.

(Not shown above) Last year's rankings were somewhat different; the CWB was ranked "very close" in view by 22% of producers, "somewhat close" by 46%, "not very close" by 17% and "not close at all" by 14%. To this end, producers' opinions that the CWB is close in view have improved: to a great extent in the "very close" category, and a moderate amount overall.

“Sell on Your Behalf” beats “Buys from You”

The CWB gets a similar result on a second question that pursues the issue of whether or not the CWB is on the side of farmers. Respondents were asked if they “see the CWB more as an organization that markets grain on your behalf internationally, or as an organization that buys your grain from you?”

Q Do you see the CWB more as an organization that markets grain on your behalf internationally, or as an organization that buys your grain from you?



Note: Don't Know / Refused not shown

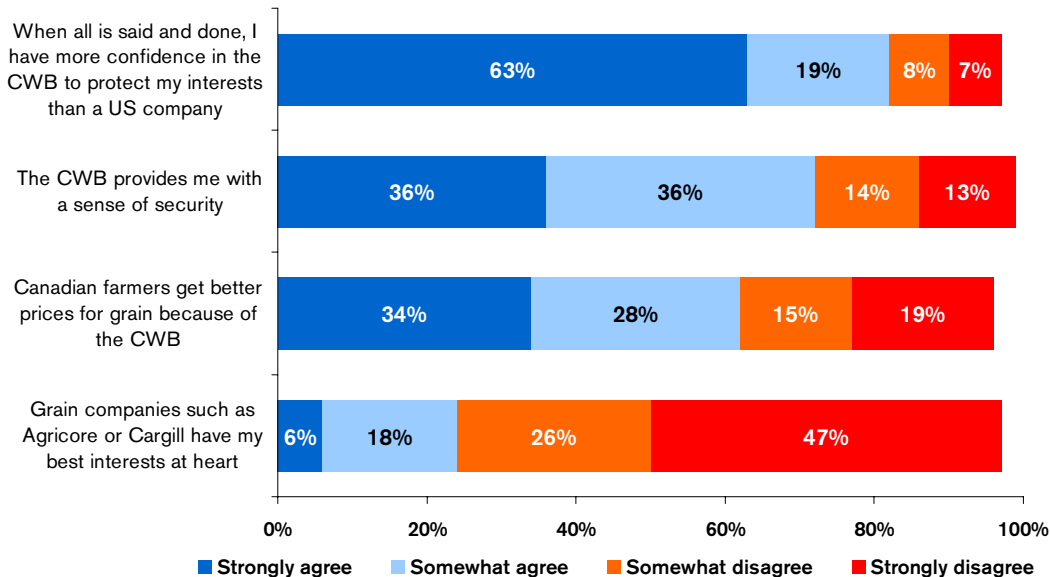
By more than a two to one margin, grain producers see the CWB as an organization that markets grain on their behalf.

The basic story is the same across the provinces. In Manitoba, the margin grows to almost three to one. Saskatchewan, home to a majority of permit holders, is very close to the average. Even in skeptical Alberta, more than six out of ten see the CWB as an organization that markets grain on their behalf.

Feelings towards CWB and major private companies are polar opposites

A series of agree/disagree statements were asked to probe feelings towards the CWB in more depth.

Q Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement.



Note: Don't Know / Refused not shown

Canadian farmers are nervous about private marketing companies in general and American companies in particular.

More than eight out of ten farmers say they have more confidence in the CWB to protect their interest than a US company. Over six in ten (63%) producers strongly feel that way.

More than seven in ten grain producers disagree that grain companies such as Agricore or Cargill have their best interest at heart. Almost half (47%) strongly disagree.

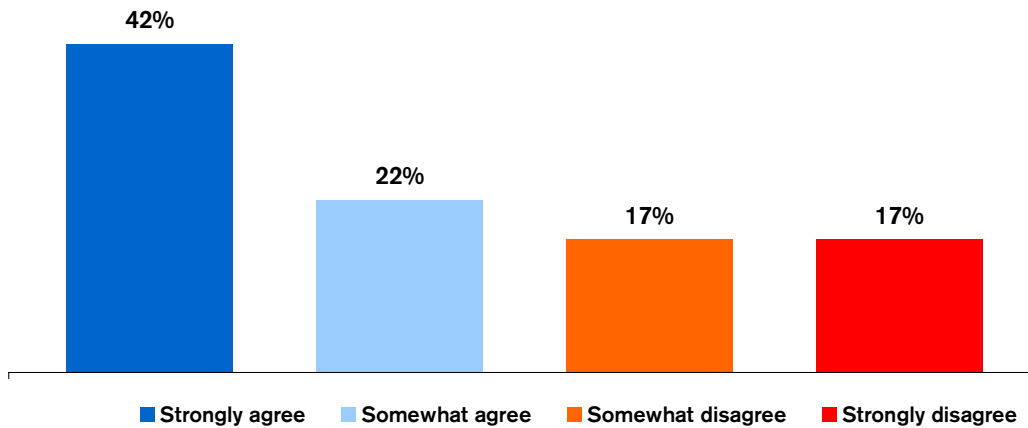
The CWB doesn't only do well in comparison to private companies. More than seven in ten (72%) agree the CWB provides me with a sense of security.

Finally, in conflict with a desire for competition noted later in this report, 62% believe Canadian farmers get better prices because of the CWB.

Strong majority opposes weakening the CWB

Producers were asked to “agree” or “disagree” with the statement “I am against anything that would weaken the CWB.”

Q Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement. ...I am against anything that would weaken the CWB



Note: Don't Know / Refused not shown

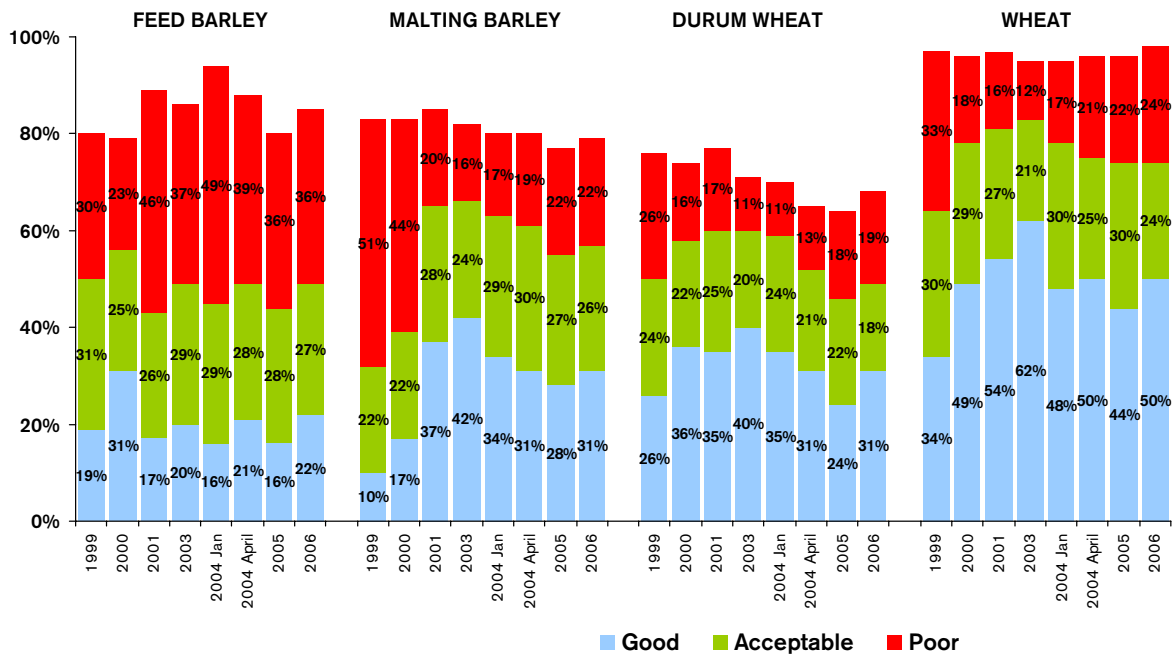
More than six in ten (64%) agree with the statement. More people strongly agree with the statement (42%) than all of those who disagree (34%).

Agreement varies significantly between provinces. As usual, Manitobans are the strongest supporters with 72% agreement. Saskatchewan producers are in the middle with two-thirds (66%) agreement. Even in Alberta, 56% agree they are against anything that would weaken the CWB.

Performance ratings bounce back

The CWB's performance ratings have rebounded from last year's more disappointing numbers.

Q On a scale of one to five where one is very poor, five is excellent and 2, 3 and 4 are in between, please give your rating of the performance of the Canadian Wheat Board in the marketing of the following grains...?



Almost three in four farmers say the say the Canadian Wheat Board's performance at selling wheat is acceptable, good or excellent. Good and excellent scores are up six points from last year.

While a significant number of farmers have no view on the CWB's performance on durum wheat, 49% say they are doing at least an acceptable job, up three points from last year. Again, there is a significant improvement in intensity with a six point gain (up to 31%) in those saying that they think the CWB is doing a good or excellent job of marketing Durum wheat.

Malting Barley shows a marginal two point gain in acceptable or better performance (57%), with a three point gain (up to 22%) in those saying the CWB is doing a good or excellent job marketing feed barley.

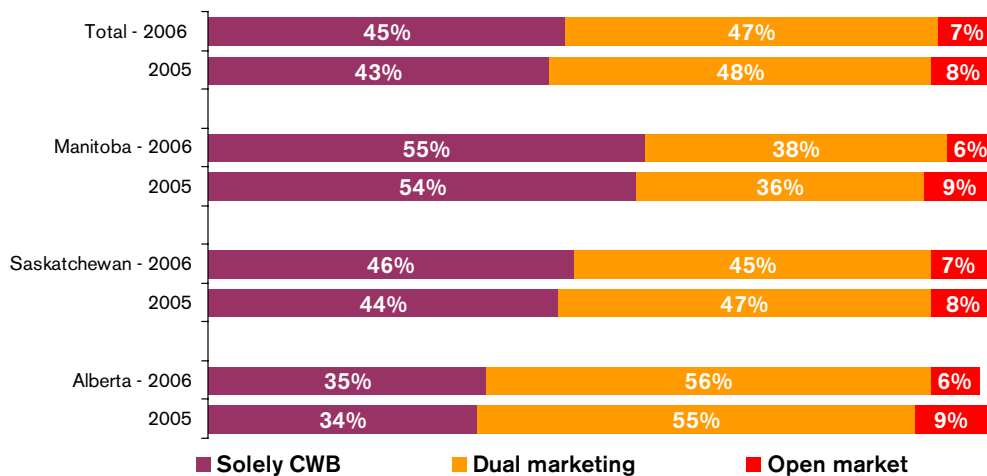
At 49%, CWB performance on marketing Feed Barley is up five points from last year, but still below the highs seen in 2000

4. Market Options

Opinions on dual marketing for wheat fairly stable

Not much has changed when it comes to producer attitudes toward dual marketing.

- Q** If you had to choose between three different approaches to marketing wheat, which of the following would you prefer?
1. That wheat marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.
 2. The dual marketing option, where private companies and individual farmers could compete with the CWB for wheat sales in the domestic and export market.
 3. That there be a totally open market for wheat without the Canadian Wheat Board.



Given three different approaches to marketing wheat, 45% chose having the CWB as the sole marketer, while 47% prefer dual marketing and just 7% want an open market.

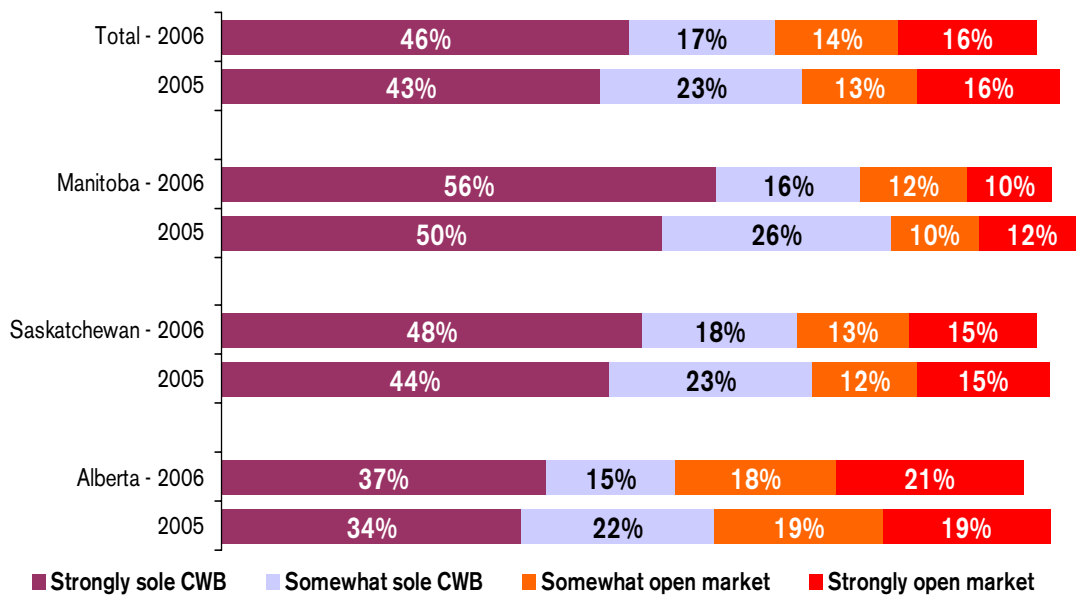
There are some marginal shifts compared to last year with preferences for both a dual market and an open market down one point and solely CWB up two points.

Manitoban respondents are the most likely to choose “solely CWB,” while Saskatchewan respondents are split between solely CWB and dual marketing; and a majority of Alberta respondents are in favour of dual marketing. Across all provinces, no more than 7% of respondents chose the open market option.

Majority select CWB over open market for wheat

When producers were asked to choose between the CWB and an open market in a head-to-head comparison, a strong majority select the Canadian Wheat Board over the open market.

Q If you had to choose between two different approaches to marketing wheat, which of the following would you prefer?
 1. That wheat marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.
 2. That there be a totally open market for wheat without the Canadian Wheat Board.
 Would you support that option strongly or just somewhat?



Overall, 63% chose having the CWB as the sole marketer and only three in ten (30%) chose an open market.

There are some marginal shifts year-over-year as support for CWB as a sole marketer dropped three points, and those who were undecided up two points; open market support rose one point.

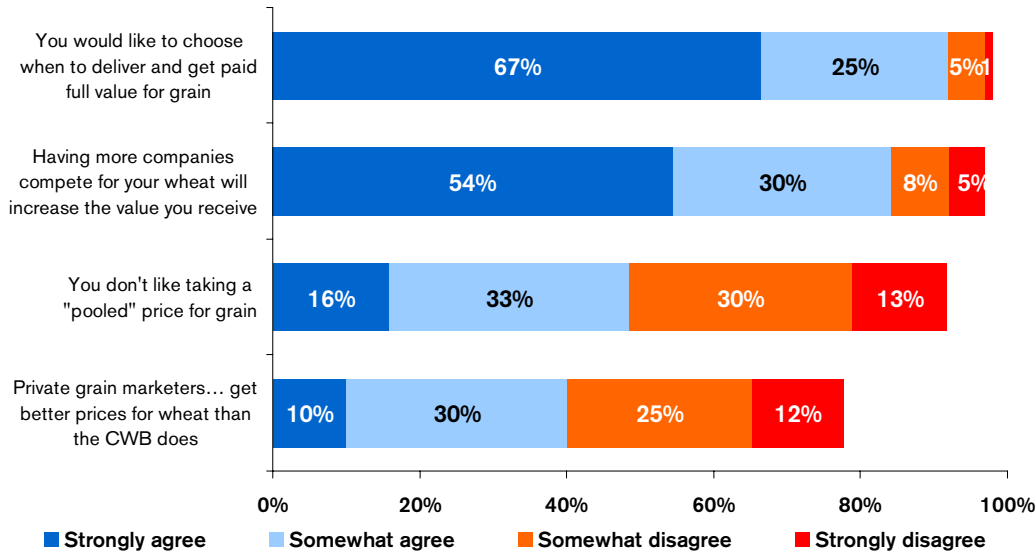
While overall support for the CWB as sole marketer is down, the intensity of that support is up across all three provinces. As with most questions, support for the CWB is highest among Manitoban producers and lowest among Albertans. However, even in Alberta a majority prefer the CWB over the open market.



Support for Dual Market based on a belief in better results through competition and a desire for more control

Several follow-up questions were asked of those respondents who prefer dual markets for wheat. The ability to control the timing of sales and a belief that competition will raise prices appear to be the key factors driving support for dual markets.

Q (If option two “dual marketing” ask) Do you agree or disagree with the following statements?



A very strong majority of those that chose the dual marketing approach to marketing wheat (over nine in ten) agree that they would like to choose when to deliver and get paid full value for grain.

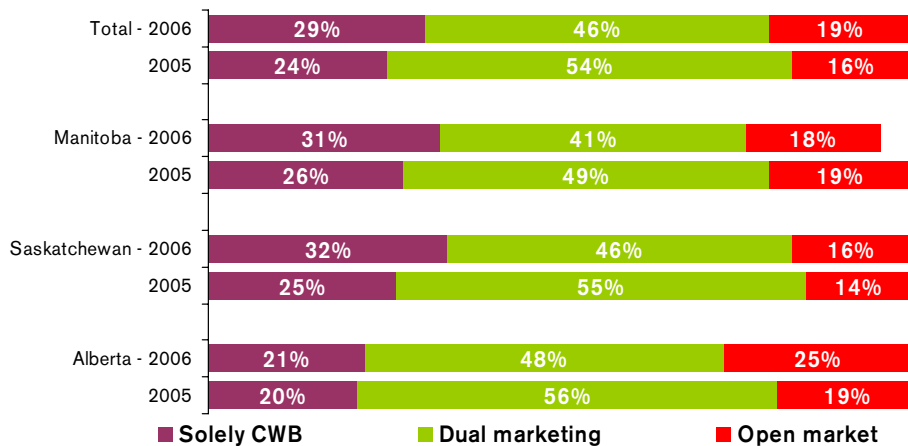
Another strong majority (84%) say that having more companies compete for farmers' wheat will increase the value received.

Just fewer than half the respondents (49%) agree that they don't like taking a 'pooled' price for grain. Only 40% agree that private grain marketers get better prices for wheat than the Canadian Wheat Board. It should also be noted that 22% of those that chose the dual marketing approach responded that they "didn't know" if private marketers would get a better price for wheat than the CWB does.

Dual marketing top choice for barley

Producers were also asked to choose between CWB sole marketing, dual marketing and an open market for marketing barley for export and domestic food consumption.

- Q** If you had to choose between three different approaches to marketing barley, which of the following would you prefer?
1. That barley marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.
 2. The dual marketing option, where private companies and individual farmers could compete with the CWB for barley sales in the domestic and export market.
 3. That there be a totally open market for barley without the Canadian Wheat Board.



While support is growing both for CWB as a sole marketer (up five points to 29%) and for an open market (up three points to 19%) pluralities of producers in all provinces prefer a dual market for barley (46%).

The increase in support for the CWB as the sole marketer grew by five points in Manitoba and seven points in Saskatchewan while holding steady in Alberta. The growth in support for an open market occurred primarily in Alberta where support grew six points to 25%.

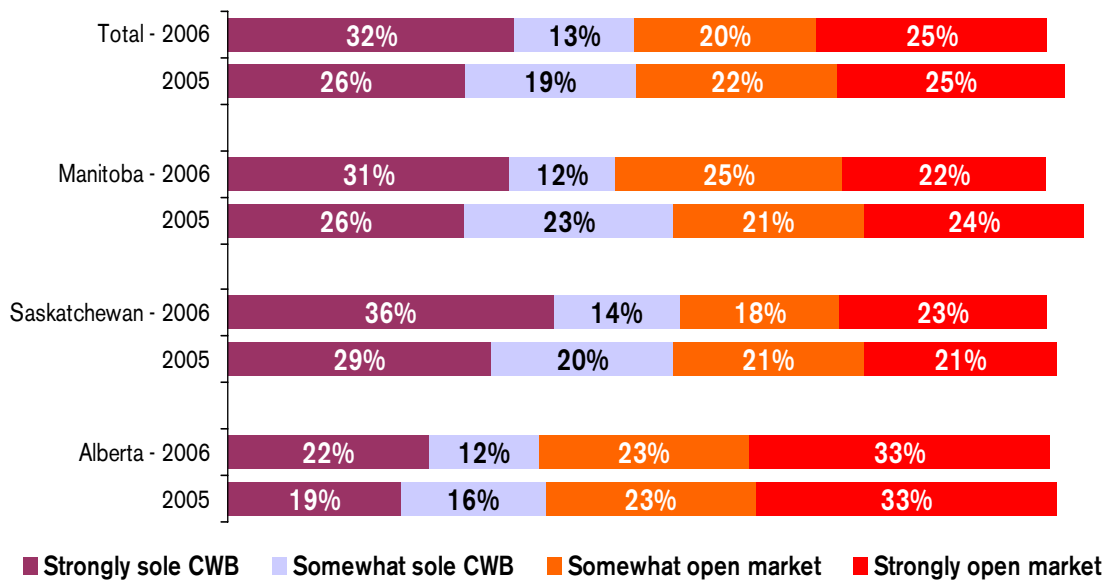
Farmers remain split between CWB and open market for barley

Opinion on barley is in a head-to-head contest between the CWB as a sole marketer and an open market, remaining similar to last year.

Q If you had to choose between two different approaches to marketing barley, which of the following would you prefer?

1. That barley marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.
2. That there be a totally open market for barley without the Canadian Wheat Board.

Would you support that option strongly or just somewhat?



Farmers are virtually evenly divided before having the CWB as the sole marketer (45%) and an open market (46%). However, as we have seen in other questions, the intensity of support for the CWB is up, this time by six points.

While Manitoba producers are usually the strongest supporters of the CWB, in this case Saskatchewan farmers show the greatest support with a bare majority of 50% that prefer the CWB to 41% that support for an open market.

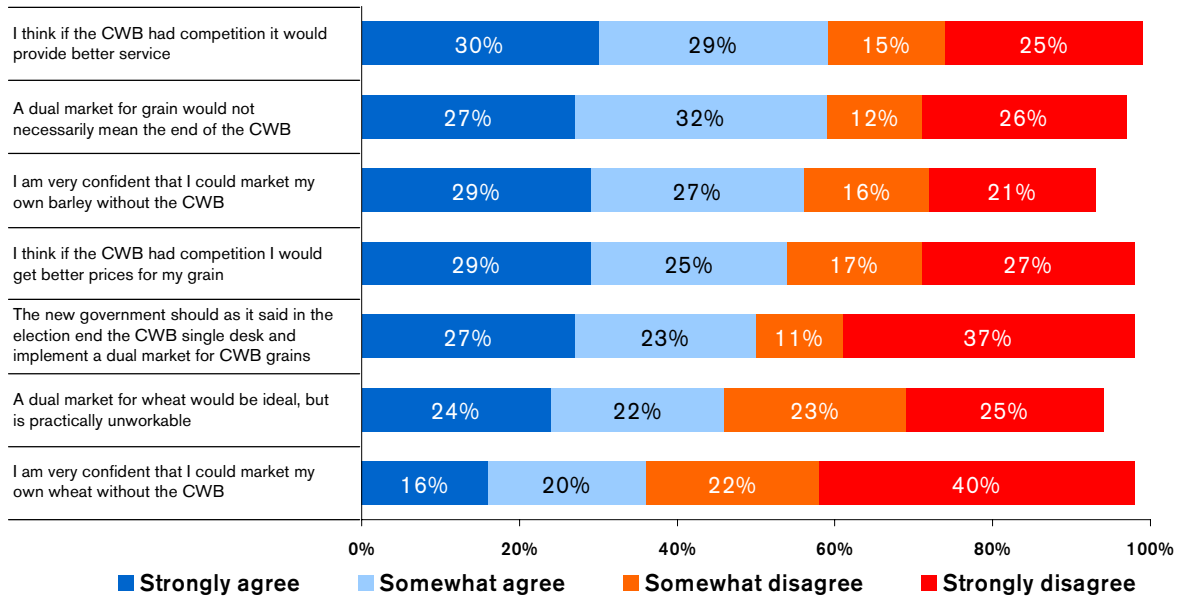
In Manitoba, a plurality of 47% support an open market but CWB support is more intense (31% strongly support) than open market support (22% strongly support).

In Alberta, a stable majority of 56% prefer an open market to a CWB single desk. Only in Alberta do we see more intense support for an open market (33%) than for the CWB (22% intense support).

General Market Attitudes: Dual marketing seen as road to better CWB through competition

A series of agree/disagree questions related to market options were asked of all participants. Once again there is a clear sense that competition is a means to a better CWB and little sense that competition may mean the end of the CWB as an effective marketing force.

Q Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement.



A majority of 54% believe if the CWB had competition, they would get better prices for their grain. Even more, nearly six in ten (59%) responded that they think the CWB would provide better service if it were exposed to competition. An equal amount (59%) stated that they didn't think a dual market would mean the end of the CWB.

Producers' level of confidence in their ability to market their grains on their own varies according to the market. A majority of 56% say they are confident they can market their own barley without the CWB but only 36% say the same thing about wheat – a 20 point confidence gap.

Half of the producers surveyed say the government should do what it promised and introduce dual marketing for CWB grains. However, there are ten percent more farmers who strongly disagree (37%) than strongly agree (27%).

Meanwhile, 46% believe while a dual market for wheat would be ideal, it is really not a viable option.

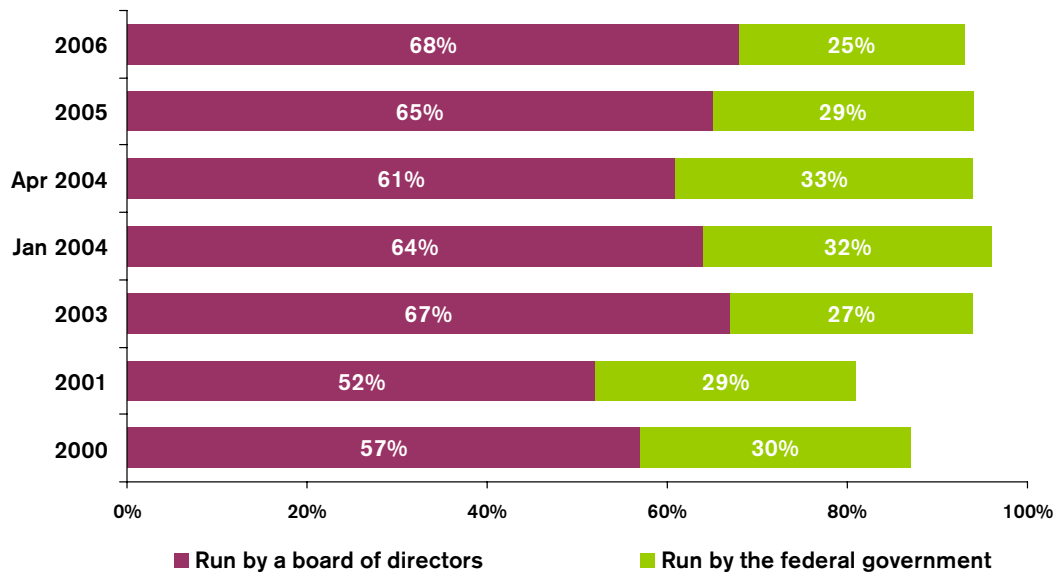


5. Governance

Seven in ten know CWB is operated by Board of Directors

To determine their knowledge of the CWB, participants were asked if they knew the operational structure of the CWB.

Q As far as your concerned, how does the CWB operate now-is the Canadian Wheat Board run by a Board of Directors or is it run by the federal government?



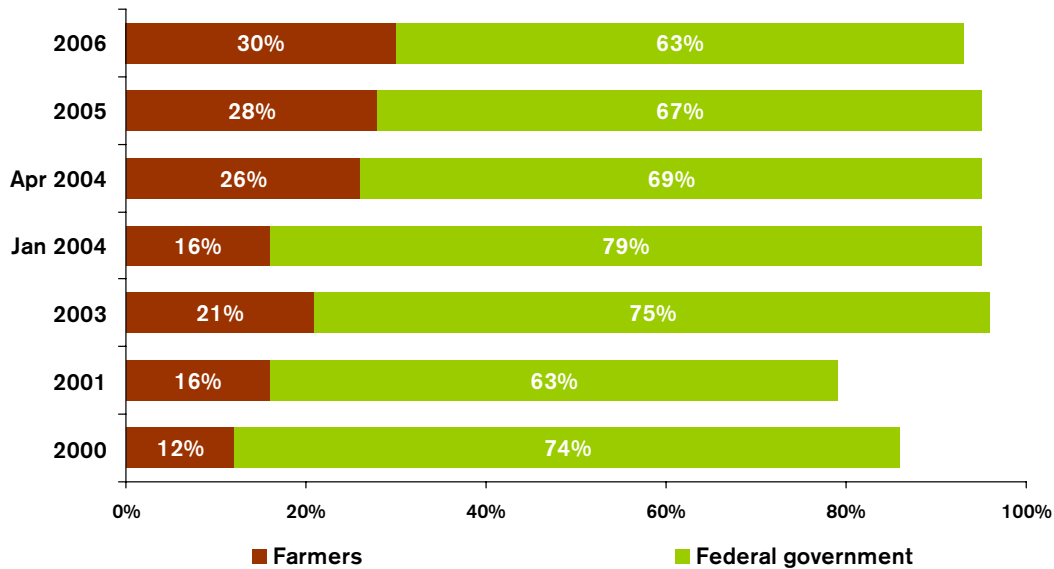
Results show that awareness is up from 2005 and is showing a continual trend upward from 2004.

At 78%, awareness is significantly higher in Manitoba than in Alberta and Saskatchewan, where it is 66% and 67% respectively. In the latter provinces, more than one in four (26%) responded that the CWB is run by the federal government.

Feeling that the government holds power still strong

While farmers increasingly recognize that the CWB is formally run by a Board of Directors, most still believe the federal government still has the final say regarding major decisions.

Q Who has more say over major decisions at the CWB-farmers or the federal government?



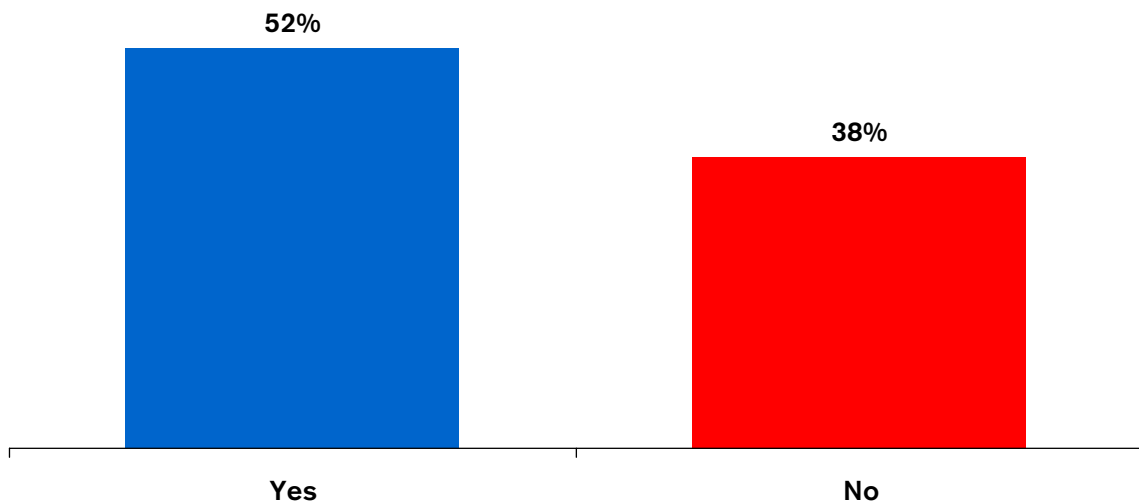
Despite the fact that a majority of 63% still see the government as in control, an increasing number of respondents over previous years feel that farmers have more say than government. This year three out of ten producers feel farmers have more say than the government, up two points from last year and up eighteen points since this question was first asked in 2000.

Manitoba producers are far more likely (39%) to say farmers have the final say than producers in either Saskatchewan (29%) or Alberta (28%).

Half believe CWB would be more effective if no link to federal government

The Canadian Wheat Board has had an arm's-length relationship with the federal government since 1998. In this year's survey, producers were asked if it is time to cut the cord to government altogether.

Q Would the CWB be more effective on behalf of farmers if it had no links at all to the federal government – yes or no?



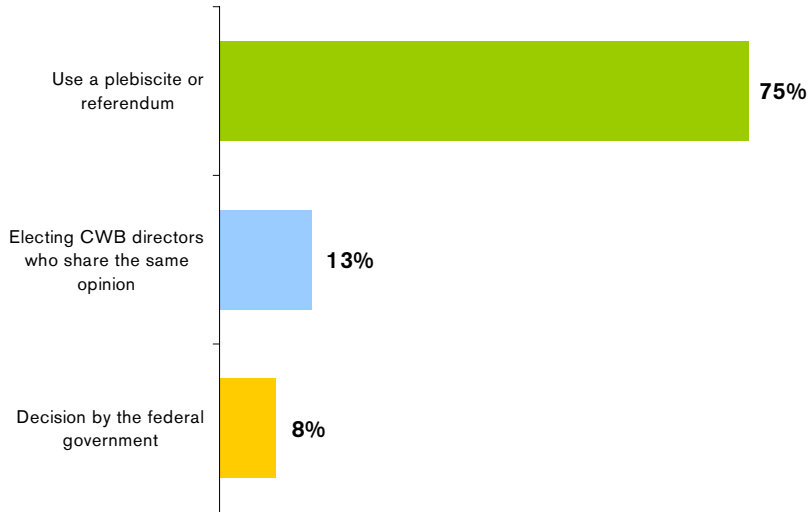
A narrow majority (52%) feel the CWB would be more effective for farmers if it had no links to the Federal Government. However a significant minority of 38% disagrees and would like to see some form of continuing connection.

The sentiment toward separation from the government is least popular in Manitoba, where less than half (45%) agree with the statement, and an equal proportion disagree. Agreement with a de-linkage of the CWB and federal government is strongest in Alberta (52%) and Saskatchewan (53%).

Three-quarters want decisions on future of CWB in hands of all affected farmers

When it comes to making major decisions about the future of the Canadian Wheat Board, producers are strongly committed to keeping their own hands on the tiller.

Q If a fundamental change to the CWB is to be made, such as ending the single desk and making the CWB voluntary, which of the following is the most appropriate way of making that decision – a decision by the federal government, by electing CWB directors who share that opinion about the CWB, or by a plebiscite or referendum among farmers?



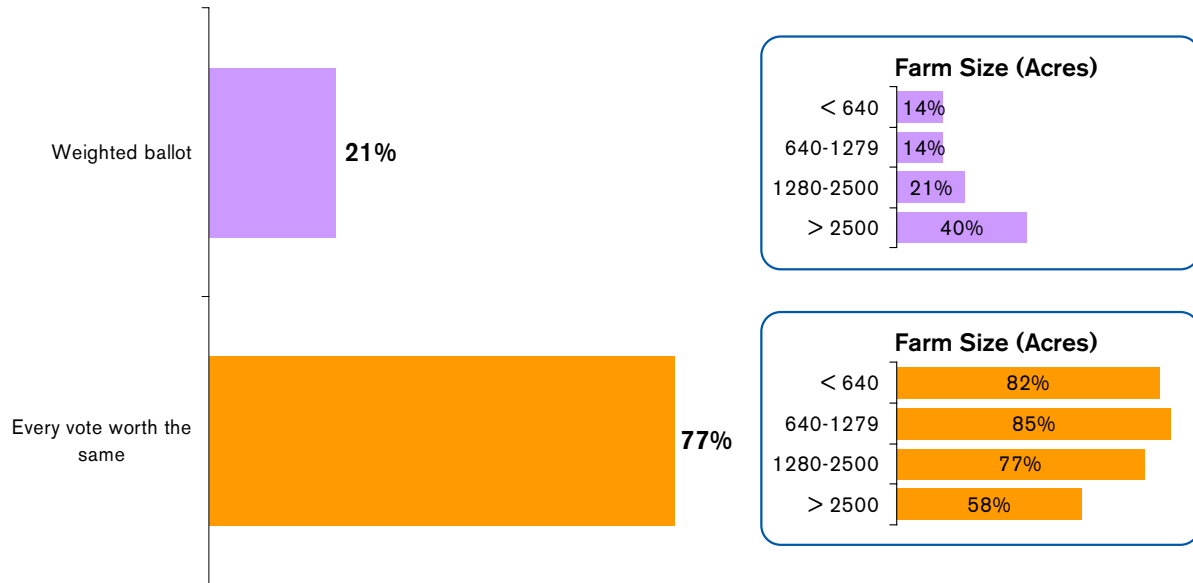
When asked what method is most appropriate in making fundamental changes to the CWB such as ending the single desk, farmers have a clear preference. Three out of four (75%) say the right approach is a plebiscite. Roughly one in eight (13%) say electing directors who share their views is the right way to make fundamental change. Just under one in ten (8%) feel a federal government decision is most appropriate.

While Alberta and Saskatchewan respondents (74% in both provinces) strongly prefer a referendum, Manitobans are slightly more emphatic in this view (77% referendum). A decision by the federal government is preferred by one in ten Albertans (10%), and less so by both Saskatchewan (7%) and Manitoban (6%) respondents.

Three-quarters want equal ballot for CWB directors

Another ongoing question related to governance is what the best method for voting is; treating each producer the same or providing weighted ballots where operators of larger grain farms have more say than producers with smaller farms.

Q Some people say that the CWB directors should be elected by a vote in which every CWB permit book holder's vote is worth the same. Other people say that the CWB directors should be elected by a weighted ballot in which votes of larger farmers would be worth more than votes of smaller farmers. Which of these two views is closer to your own?



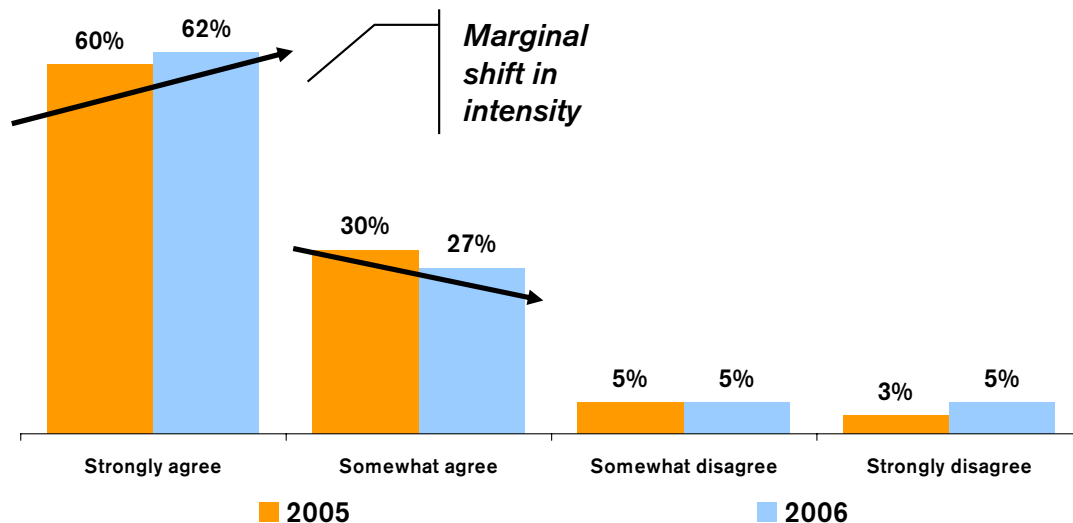
Support for having every vote worth the same amount is high across the Prairies with a relative low of 71% in Alberta (71%) to a high of 79% in Saskatchewan. Support for having a weighted ballot is highest in Alberta, where one quarter prefers this option (25%).

It is interesting to note that even among farmers with more than 2500 acres under cultivation, a majority (58%) believe each vote should be equal, although it comes as little surprise to learn that producers with large operations are most supportive of a weighted vote (40%).

Strong agreement for Canadian Wheat Board advocacy

Grain producers overwhelmingly support having the CWB speak up for farmers more often.

Q Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement.
... I would like to see the CWB speak up for farmers more often



Note: Don't Know / Refused not shown

Overall agreement with the idea of a more active CWB is relatively stable at 89% agreement this year compared to 90% last year. Intensity, which was already high last year with 60% strong agreement, has grown another two points in 2006.

Agreement is relatively stable across the Prairies with 87% agreement in Alberta, 89% in Saskatchewan and 91% in Manitoba.



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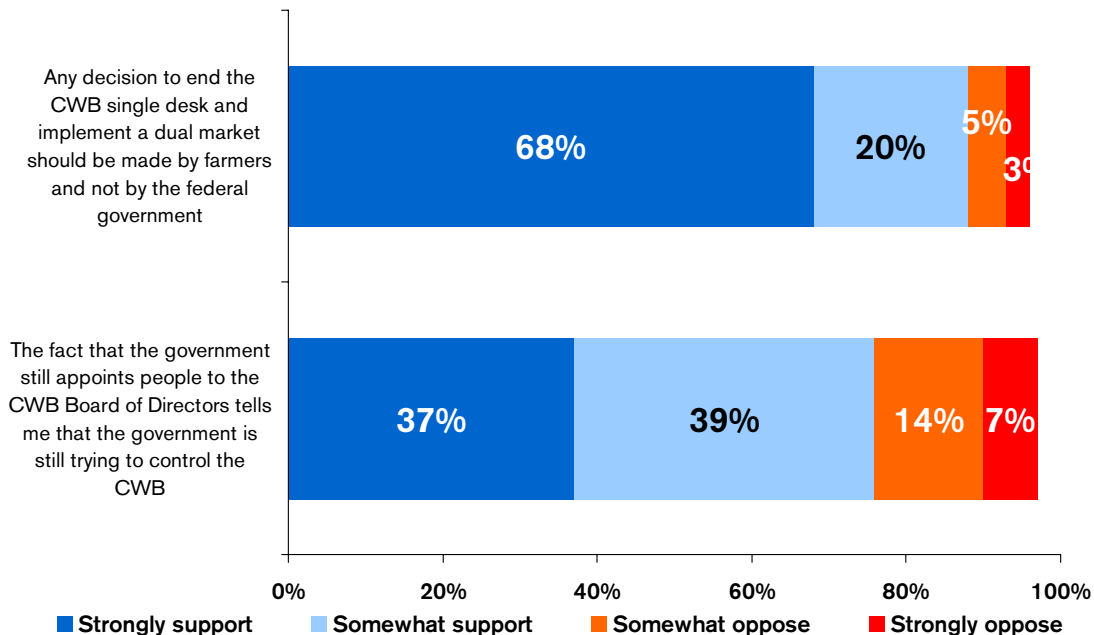
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Support for advocacy grows in intensity

Two other statements related to governance were included in a final agree/disagree battery near the end of the survey.

Q Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement. ...cont'd



Note: Don't Know / Refused not shown

Consistent with the earlier findings in the section, 88% of producers believe any decision to end the CWB single desk and implement a dual market should be made by farmers and not the federal government. There is a huge amount of intensity behind this belief with more than two thirds strongly agreeing with the statement.

This is a belief that unites farmers across the West. Eighty-five percent of Alberta producers, 89% of Manitobans and 90% of Saskatchewan farmers agree that they should make the choice when it comes to ending the single desk.

Suspicion of the federal government also runs strong among producers. More than three out of four farmers surveyed agree that the fact the government still appoints people to the CWB Board of Directors tells them the federal government is still trying to control the CWB.

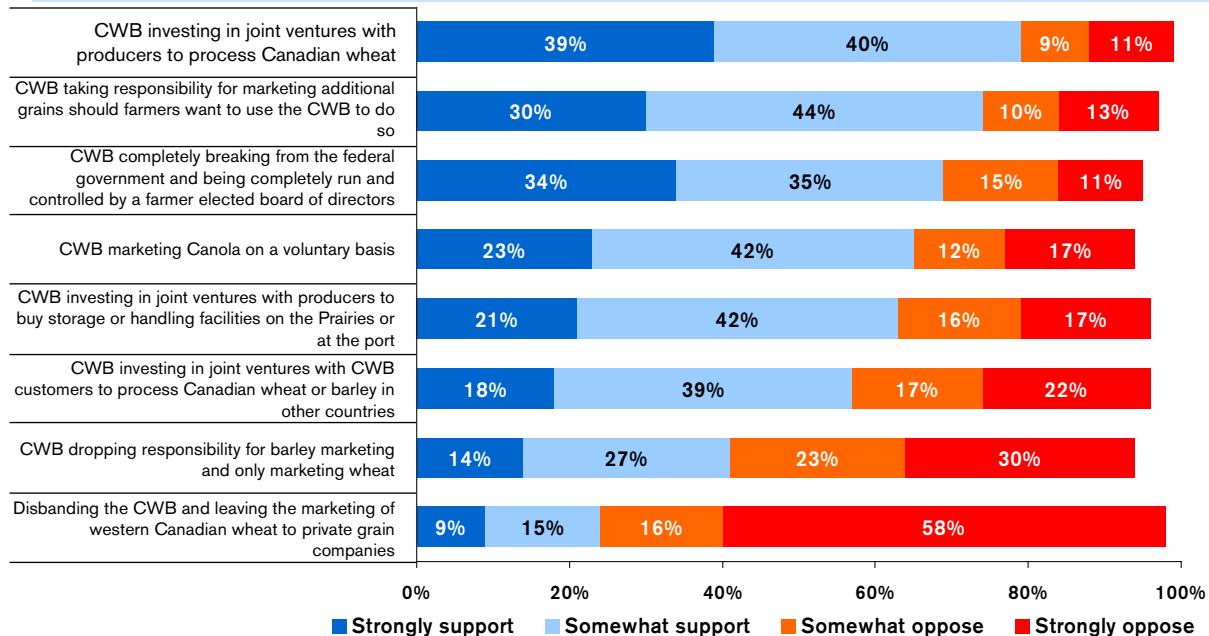
Albertans are the most likely to agree with this statement at 79% followed by Manitobans (76%) and farmers from Saskatchewan (72%).

6. CWB Business Initiatives

Farmers strongly support most initiatives that would expand CWB’s role and oppose initiatives that would reduce its role

Farmers clearly support most initiatives that would involve CWB taking an expanded role to help farmers secure more of the value chain. In general, a majority supported business initiatives that would broaden the CWB’s efforts and opposed initiatives that would narrow its focus.

Q There are a number of ideas about how the CWB could change the way it operates. Please tell me whether you would strongly support, somewhat support, somewhat oppose or strongly oppose each of the following moves by the CWB:



There is strong support for CWB to invest in processing joint ventures both with producers in Canada (70% support) and with customers in other countries (57% support). More than seven in ten (73%) farmers also support the CWB investing in storage or handling facilities on the Prairies or at the ports. Producers also support the CWB marketing additional grains (74% support) and Canola (65%) on a voluntary basis.

A majority of 53% opposes the CWB dropping barley and focusing on wheat and almost three in four (74%) oppose disbanding the CWB and leaving the marketing to private grain companies, out of all the statements above. Opposition for this was highest in Manitoba (80%) followed by Saskatchewan (74%) and Alberta (69%).

Finally, almost seven in ten (69%) think the CWB should cut the government apron strings and become completely run and controlled by farmers.



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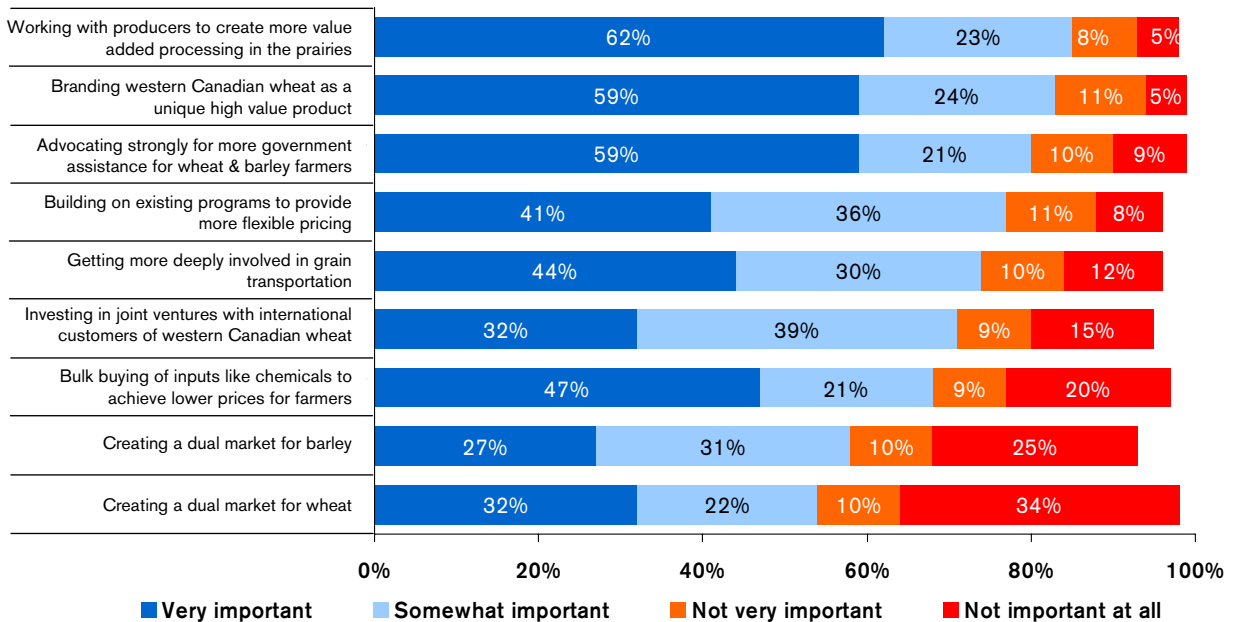
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Value-added processing and branding most important possible CWB initiatives

In a separate battery, we find similar results when we ask how important a series of initiatives could be to making farms more profitable.

Q Thinking about what would make your farm more profitable, how important to you would be the following possible initiatives from the CWB. Would it be important, somewhat important, not very important, not important at all?



Note: Don't Know / Refused not shown

Again we see the same patterns. Strong support for an activist CWB, both in terms of its economic role and its advocacy role.

Support for international joint ventures with customers, getting more involved in transportation and creating more value added processing on the Prairies receive no less than 71% saying very or somewhat important (international joint ventures) to 85% support (Prairie value-added processing).

Support for bulk buying of inputs and providing more flexible pricing options also secure strong support as does branding western Canadian wheat.

Advocating strongly for more government assistance to farmers is at least somewhat important to 80% of farmers surveyed and very important to 59%.

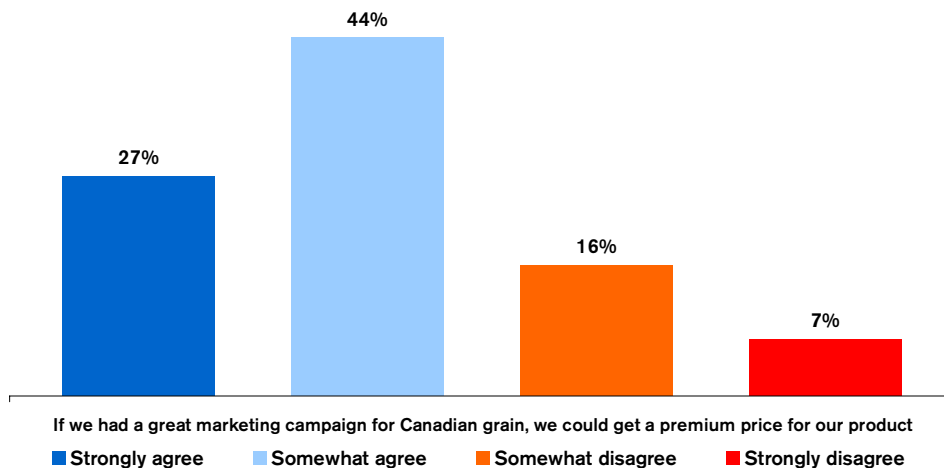
The two least important initiatives are a dual market for barley (58% at least somewhat important) and wheat (54% at least somewhat important.)

Strong support for improved marketing to drive up price

Consistent with the importance given to branding Western Canadian Wheat as a high value-added product seen on the previous page, just over seven in ten producers agree a new marketing campaign could generate a premium price for Western Canadian Wheat.



Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement. ...*If we had a great marketing campaign for Canadian grain, we could get a premium price for our product*



Note: Don't Know / Refused not shown

Support for an improved marketing campaign is strong and solid across all three provinces.

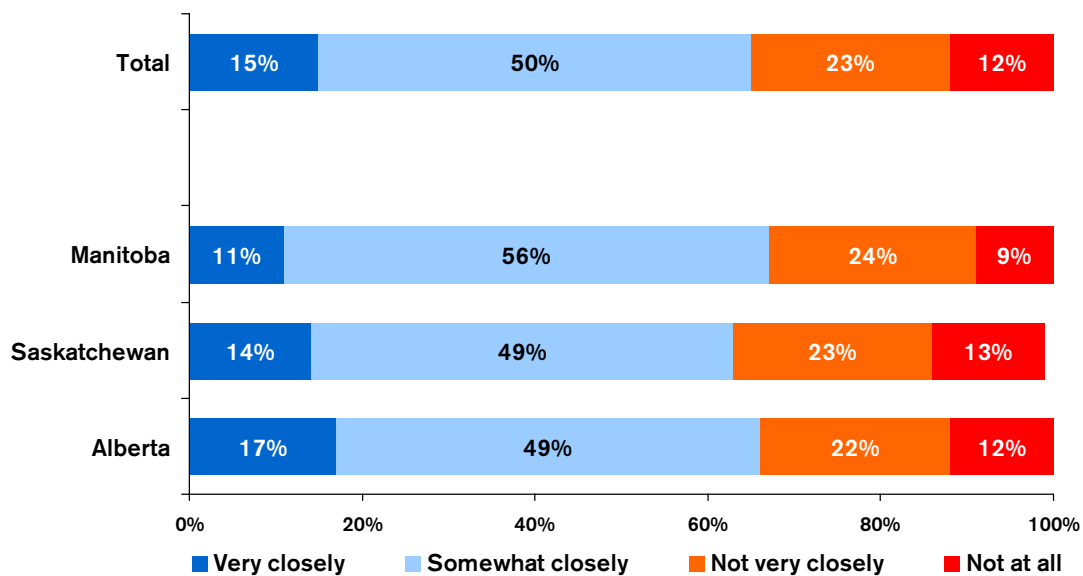
Seven in ten agree in each of Alberta (72%), Saskatchewan (70%) and Manitoba (71%). Strong agreement is highest in Alberta (28%) but only marginally, as Saskatchewan (27%) and Manitoba (26%) are not far behind.

7. WTO Related Issues

Two-thirds have been following WTO talks

While trade issues are critical both to access to markets and to combating subsidies, Prairie grain producers are not glued to their televisions watching every nuance of the discussions.

Q How closely have you been following the World Trade Organization talks and their impact on agriculture—very, somewhat, not very, not at all?



Note: Don't Know / Refused not shown

Only 15% of farmers surveyed report following the WTO talks very closely. However, half the sample is watching them somewhat closely.

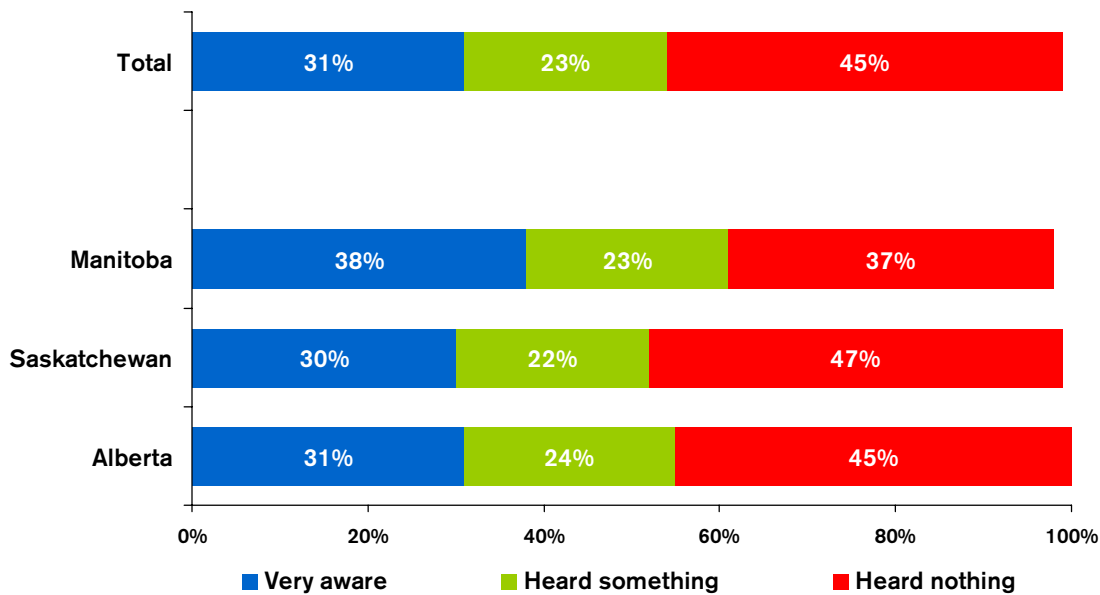
In the cases of Manitoba and Alberta, double the percentage of respondents are monitoring the WTO talks compared to those who are not, (67% watching versus 33% not watching in Manitoba; 66% watching versus 33% not watching in Alberta.)

The percentage of respondents watching very closely increases as we go west, with Manitoba having the lowest percent (11%) and Alberta the highest (17%).

Three-in-ten very aware of WTO demands

Only half (54%) had heard at least heard something or were very aware of the WTO's demand to eliminate initial payment and borrowing guarantees.

Q Are you aware that the WTO has demanded, and the federal government has agreed to eliminate the federal guarantee of CWB initial payments and borrowing-very aware, heard something, heard nothing?



Note: Don't Know / Refused not shown

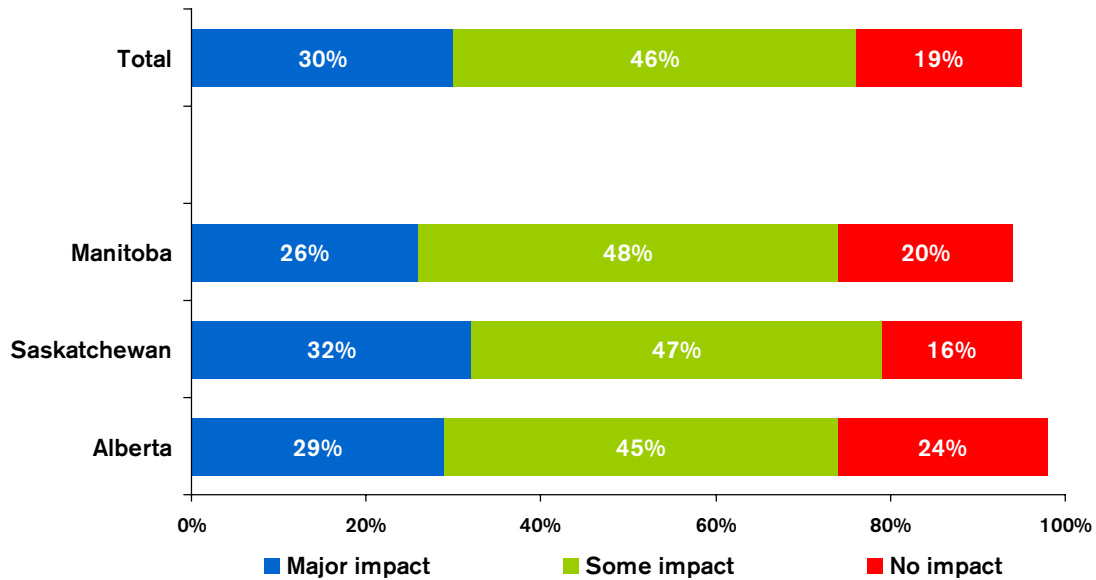
Given the importance of these guarantees, the above finding may be surprising. At 38% very aware and another 23% having heard something, awareness levels are highest in Manitoba, where significantly more respondents were very aware of the WTO's demand compared with the other provinces.

Awareness is lowest in Saskatchewan with 30% very aware and 22% who say they have heard something. Awareness in Alberta is very similar to Saskatchewan with 55% stating that they had at least heard something of the WTO demands.

Three-Quarters say WTO demands will have at least some impact on them

Three in ten (30%) expect that WTO demands will have a significant impact on them personally. Another 46% expect at least some impact. Only about one in five grain producer expect the WTO negotiation to make no difference in their lives.

Q Will this have a major impact on you, some impact on you or no impact on you?

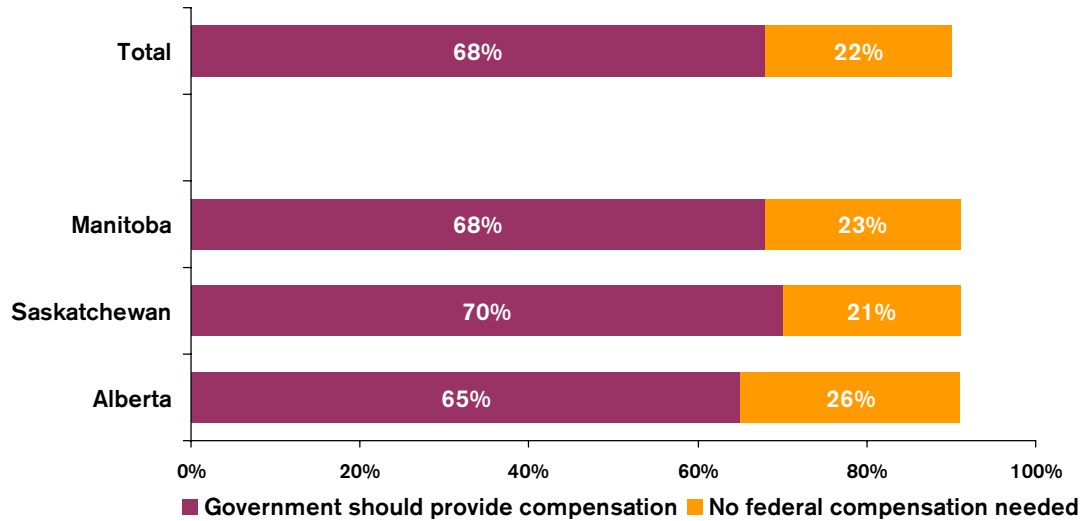


Respondents in Saskatchewan appear to be most concerned about the impact of the WTO's demands, with more than three in ten (32%) saying they will have a major impact, and nearly eight in ten saying it will have at least some impact (79%). Conversely, in Alberta nearly one in four (24%) feel that the WTO demands will have no impact on them.

Most believe government should provide compensation

Nearly seven in ten (68%) say that the government should provide some compensation for the elimination of payment and borrowing guarantees.

Q Some/other people say that the federal government should provide compensation for the elimination of the initial payment and borrowing guarantees. Other/Some say that the initial payment and borrowing guarantees were an important part of getting WTO agreement to a level playing field for agricultural producers around the world and therefore no federal government compensation is needed once eliminated. Which of these two opinions is closest to your own?

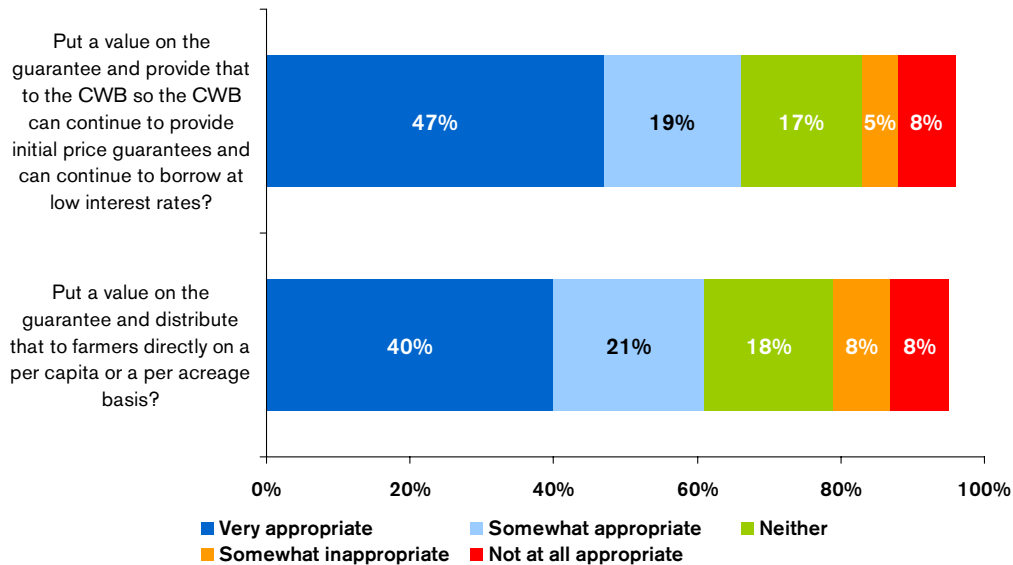


Saskatchewan is most fervent in this belief: 70% of respondents in that province say that compensation should be given. In Alberta, this number is slightly lower, as one in four (26%) believe that no compensation is needed.

Government compensation through CWB is evaluated slightly more favourably than direct-to-farmer.

Producers were asked to assess how appropriate it would be to provide compensation directly to farmers as well as through the CWB.

Q If there were to be compensation, there are a number of ways of delivering that. On a scale of one to five, where one means not appropriate at all and five means very appropriate, how appropriate would it be for the government to....?



Both approaches met with approval from farmers. However, almost two thirds (66%) believe compensation via the CWB is appropriate; this is five percent more than feel direct compensation to farmers is appropriate (61%).

Putting a value on guarantees and providing compensatory funds through the CWB is deemed very appropriate by nearly one half of respondents (47%) compared to two in five (40%) who give the same designation to providing compensatory funds directly to farmers.

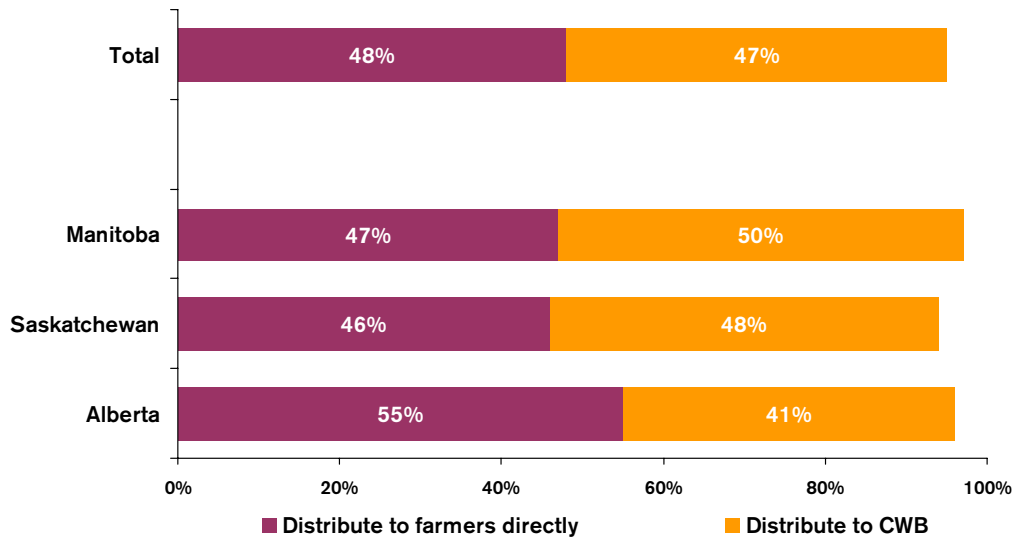
Feeling that direct compensation to farmers is appropriate is quite similar across the Prairies with 60% of Manitobans, 61% of Saskatchewan producers, and 62% of Albertans all saying direct compensation to farmers is very or somewhat appropriate. Less than one in five feels that direct compensation is not appropriate (not appropriate: 16% AB; 16% SK; 18% MB.)

The belief that compensation through the CWB is appropriate is highest in Manitoba (73% somewhat or very appropriate). This is significantly higher than both Saskatchewan (66%) and Alberta (61%). Belief that compensation through the CWB is not appropriate is significantly higher in Alberta (18%) than in the other two provinces.

Farmers split on whether it's best to have compensation through CWB or directly

A near-even split occurs when farmers are forced to choose between the two compensation options.

Q Which of the two options mentioned earlier would you say is the most appropriate? Would that be distributing to farmers directly or providing it to the CWB so the CWB can continue to provide initial price guarantees and can continue to borrow at low interest rates?



Note: Don't Know / Refused not shown

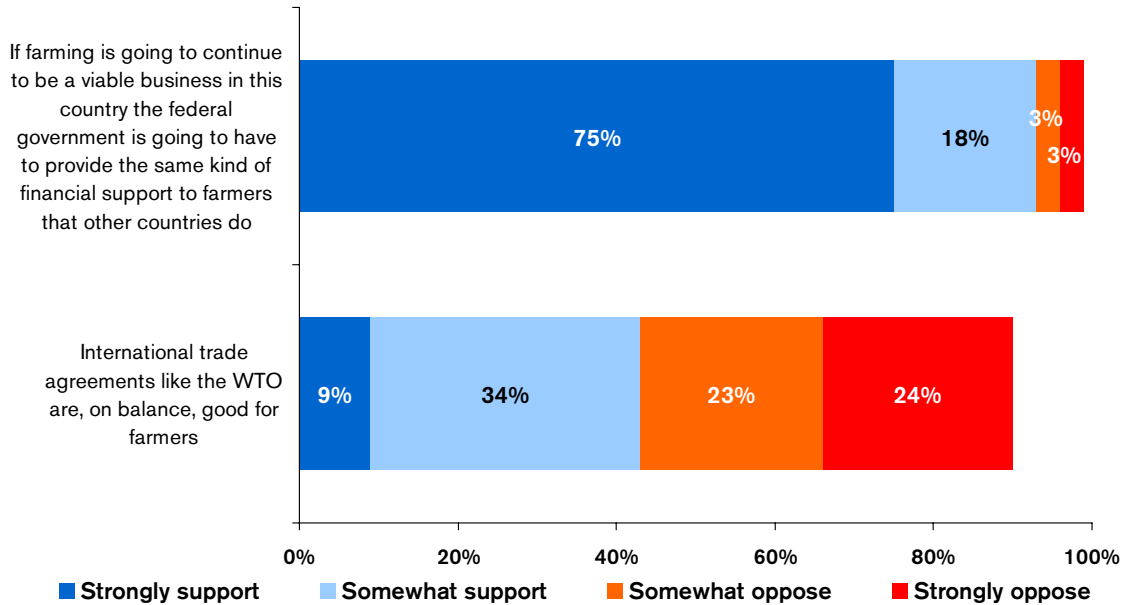
When asked to choose between the two statements, a statistical tie emerges as 48% select direct-to-farmer compensation (48%) while 47% prefer compensation through the CWB.

Support for direct-to-farmer compensation was highest in Alberta, where a majority (55%) selected this option. Both Manitoba and Saskatchewan marginally preferred compensation through the CWB (50% and 48% respectively for compensation through CWB; 47% and 46% for direct-to-farmer.)

Attitudes towards trade

To provide context to the trade questions, farmers were asked about the necessity for federal government financial support to farmers as well as the potential benefit of trade agreements such as the WTO.

Q Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement. ...cont'd



Note: Don't Know / Refused not shown

Farmers strongly believe that the federal government has to provide the same sort of financial support to Canadian farmers as other governments provide their own farmers.

The strongest support for this view is seen in Saskatchewan, where 78% strongly agree. While Albertans are more likely to disagree, it should be noted that less than one in ten Albertans (8%) disagree in total.

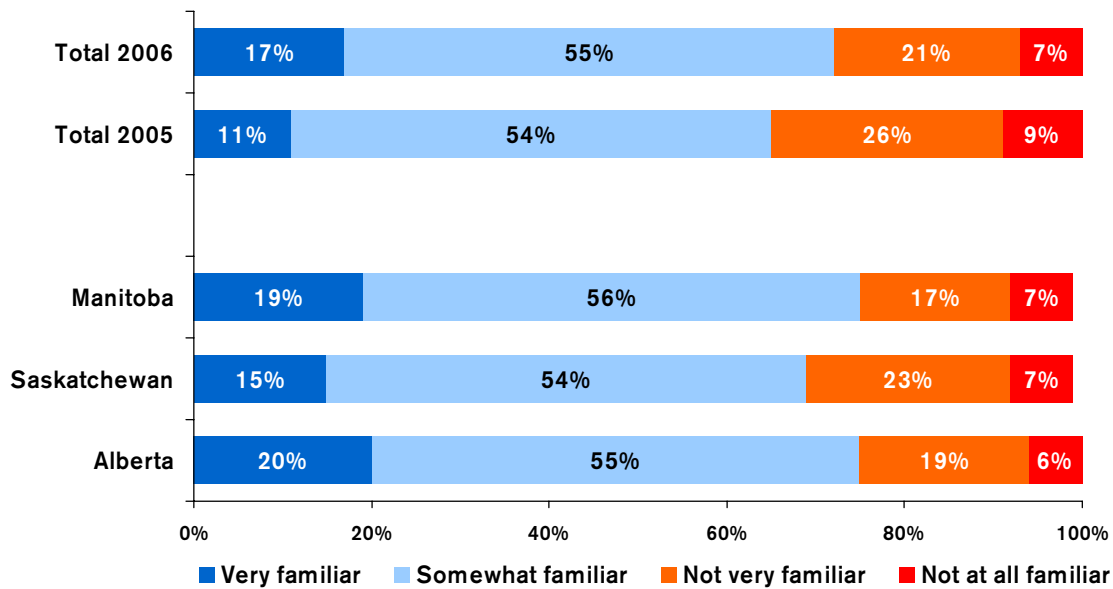
In terms of the statement on international trade agreements, disagreement is highest in Manitoba, where more than half (54%) disagree, compared to 43% and 48% in Alberta and Saskatchewan respectively.

8. Pricing Options

Interest in pricing options stable

More than seven in ten farmers (72%) say they are at least somewhat familiar with pricing options such as fixed price contracts.

Q The CWB has introduced some pricing options such as fixed price contracts, basis contracts, guaranteed delivery contracts and early payment options. How familiar are you with those – very familiar, somewhat familiar, not very familiar or not at all familiar?



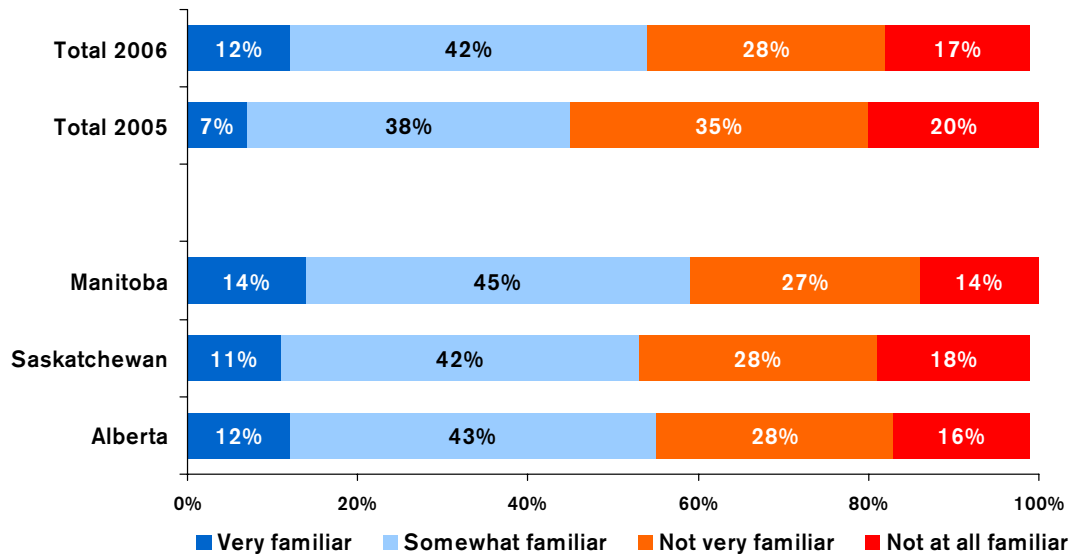
Awareness of pricing options is up seven points from 2005's survey, with a six point gain in the highest category – very familiar.

Saskatchewan's familiarity is lowest of the three provinces (69%) but is only slightly lower than Manitoba and Alberta.

Familiarity with daily price contracts has increased 9 points from last year

Currently, more than half (54%) of respondents are at least somewhat familiar with the concept of daily price contracts.

Q The CWB has recently introduced a Daily Price Contract under its Producer Payment Option programs. This contract enables farmers to price their grain using a daily cash price based on U.S. elevator prices. The DPC will provide farmers with choices to allow them earlier cash flow and increased pricing flexibility? How familiar are with this-very familiar, somewhat familiar, not very familiar or not at all familiar?



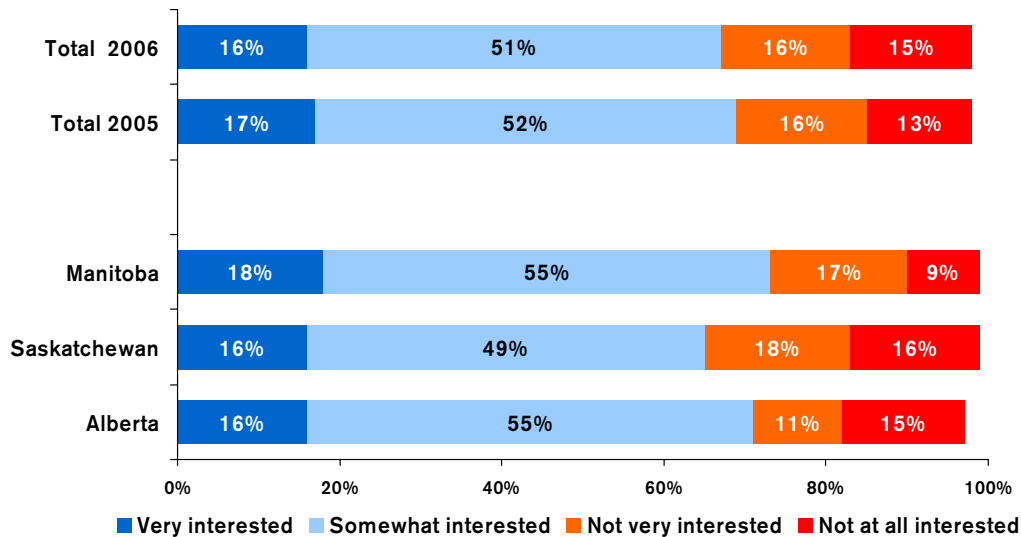
Awareness has jumped nine points this year with a similar five point gain in the highest category, “very familiar”.

Again, awareness is lowest in Saskatchewan, where 53% say they are at least somewhat familiar with the concept, but this lower number is only marginally smaller than in the neighbouring provinces.

Stable interest in Daily Price Contract

While down slightly from last year, two thirds (67%) remain at least somewhat interested in daily price contracts.

Q Would you be interested, somewhat interested, not very interested or not at all interested in using this contract to manage pricing risk on your farm?



There is a marginal decline of two points in interest in daily price contracts while the less interested categories are up two points.

Two thirds of respondents (67%) express interest in using daily price contracts to manage pricing risk on their farms. This number has decreased marginally from 2005 but is still stable, and is strongest in Manitoba (73%) and weakest in Saskatchewan (65%).

Appendix A: Interview Schedule

**CANADIAN WHEAT BOARD
2006 PRODUCERS STUDY**

**INTERVIEW SCHEDULE
Spring 2006**



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Interview Schedule

Hello, I'm calling from NRG Research Group. We are conducting a very important study with farm decision makers concerning grain marketing issues and the Canadian Wheat Board. I need to speak with the person who is primarily involved in making decisions about your farm operation. Is that you?
[IF NO, ASK TO SPEAK TO RIGHT PERSON AND REINTRODUCE YOURSELF]

Yes
No

Do you actively produce grain for sale or do you produce only for your own use (i.e., for feeding cattle etc.)?

Yes – For sale	[CONTINUE]
Only – For own use	[THANK & TERMINATE]
Not farming anymore/no grain farming	[THANK & TERMINATE]
Refused	[THANK & TERMINATE]



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1. Do you feel things in agriculture in ____ (**insert province**) are generally going in the right direction or do you feel things are off on the wrong track?

All Respondents	n=1303
Right direction	10.5%
Wrong track	83.6%
Don't Know / No Response [VOLUNTEERED]	6.0%

- 1a. Do you feel things in agriculture in **Alberta** are generally going in the right direction or do you feel things are off on the wrong track?

Alberta Respondents	n=335
Right direction	13.2%
Wrong track	78.6%
Don't Know / No Response [VOLUNTEERED]	8.2%

- 1b. Do you feel things in agriculture in **Saskatchewan** are generally going in the right direction or do you feel things are off on the wrong track?

Saskatchewan Respondents	n=779
Right direction	8.7%
Wrong track	86.4%
Don't Know / No Response [VOLUNTEERED]	5.0%

- 1c. Do you feel things in agriculture in **Manitoba** are generally going in the right direction or do you feel things are off on the wrong track?

Manitoba Respondents	n=189
Right direction	13.0%
Wrong track	81.1%
Don't Know / No Response [VOLUNTEERED]	6.0%

2. In your opinion, is the outlook for farming for this year more optimistic or more pessimistic than last year?

(IF OPTIMISTIC/PESSIMISTIC ASK): Would that be very much or just somewhat more optimistic/pessimistic?

	n=1303
Very much more optimistic	2.8%
Somewhat more optimistic	8.9%
Stay the same	5.9%
Somewhat more pessimistic	27.4%
Very much more pessimistic	53.4%
Don't Know/No Response [VOLUNTEERED]	1.5%

3. On a scale of one to five, where one means not a problem at all and five means a big problem, how much of a problem will each of the following be for your farm in the coming year?

a. Price of wheat

	n=1303
1, Not A Problem At All	3.2%
2	2.8%
3	9.4%
4	16.6%
5, A Big Problem	66.7%
Don't Know/No Response [VOLUNTEERED]	1.3%

b. Price of other grains

	n=1303
1, Not A Problem At All	2.5%
2	2.1%
3	6.9%
4	18.1%
5, A Big Problem	68.4%
Don't Know/No Response [VOLUNTEERED]	1.9%

c. Cost of farm inputs

	n=1303
1, Not A Problem At All	0.9%
2	1.1%
3	2.6%
4	10.7%
5, A Big Problem	84.5%
Don't Know/No Response [VOLUNTEERED]	0.3%

d. Lack of markets for grains

	n=1303
1, Not A Problem At All	4.8%
2	11.2%
3	23.8%
4	19.0%
5, A Big Problem	39.3%
Don't Know/No Response [VOLUNTEERED]	1.8%

4. On the farming issues most important to you, how close are the views of (4a to 4g) to your own - very close, somewhat close, not very or not close at all? **(RANDOMIZE ORDER)**

a. Agricore United

	n=1303
Very Close	9.6%
Somewhat Close	45.8%
Not Very Close	17.3%
Not at All Close	16.2%
Don't Know/No Response [VOLUNTEERED]	11.2%

b. The Canadian Wheat Board

	n=1303
Very Close	30.6%
Somewhat Close	39.7%
Not Very Close	14.1%
Not at All Close	13.5%
Don't Know/No Response [VOLUNTEERED]	2.0%

c. The federal government

	n=1303
Very Close	4.8%
Somewhat Close	32.4%
Not Very Close	29.7%
Not at All Close	25.8%
Don't Know/No Response [VOLUNTEERED]	7.4%

d. The government of Alberta

Alberta Respondents	n=335
Very Close	15.0%
Somewhat Close	40.1%
Not Very Close	21.4%
Not at All Close	18.5%
Don't Know/No Response [VOLUNTEERED]	5.0%

e. The government of Saskatchewan

Saskatchewan Respondents	n=779
Very Close	6.5%
Somewhat Close	29.0%
Not Very Close	30.1%
Not at All Close	31.3%
Don't Know/No Response [VOLUNTEERED]	3.2%

f. The government of Manitoba

Manitoba Respondents	n=189
Very Close	6.0%
Somewhat Close	40.5%
Not Very Close	31.9%
Not at All Close	17.6%
Don't Know/No Response [VOLUNTEERED]	4.0%

g. Saskatchewan Wheat Pool

	n=1303
Very Close	7.2%
Somewhat Close	37.4%
Not Very Close	19.9%
Not at All Close	19.6%
Don't Know/No Response [VOLUNTEERED]	16.0%

h. Cargill

	n=1303
Very Close	3.8%
Somewhat Close	28.3%
Not Very Close	22.7%
Not at All Close	29.0%
Don't Know/No Response [VOLUNTEERED]	16.2%

i. National Farmers' Union

	n=1303
Very Close	11.3%
Somewhat Close	36.8%
Not Very Close	18.2%
Not at All Close	21.3%
Don't Know/No Response [VOLUNTEERED]	12.5%

j. Farmers for Justice

	n=1303
Very Close	6.0%
Somewhat Close	24.2%
Not Very Close	13.4%
Not at All Close	21.5%
Don't Know/No Response [VOLUNTEERED]	34.8%

k. Western Canadian Wheat Growers

	n=1303
Very Close	9.6%
Somewhat Close	32.5%
Not Very Close	17.6%
Not at All Close	27.8%
Don't Know/No Response [VOLUNTEERED]	12.5%

l. Keystone Agricultural Producers (Man only)

Manitoba Respondents	n=189
Very Close	27.2%
Somewhat Close	56.1%
Not Very Close	9.3%
Not at All Close	4.7%
Don't Know/No Response [VOLUNTEERED]	2.7%

m. Canadian Federation of Agriculture

	n=1303
Very Close	8.0%
Somewhat Close	44.7%
Not Very Close	16.4%
Not at All Close	11.2%
Don't Know/No Response [VOLUNTEERED]	19.7%

n APAS (Saskatchewan only)

Saskatchewan Respondents	n=779
Very Close	20.3%
Somewhat Close	44.4%
Not Very Close	10.8%
Not at All Close	10.3%
Don't Know/No Response [VOLUNTEERED]	14.1%

o. Wild Rose Agricultural Producers (Alberta only)

Alberta Respondents	n=335
Very Close	11.5%
Somewhat Close	32.2%
Not Very Close	12.5%
Not at All Close	12.2%
Don't Know/No Response [VOLUNTEERED]	31.7%

5. All things considered, do you support or oppose the Canadian Wheat Board? Is that strongly support, somewhat support, somewhat oppose or strongly oppose?

	n=1303
Strongly support	46.2%
Somewhat support	30.0%
Somewhat oppose	9.3%
Strongly oppose	11.7%
Don't Know/No Response [VOLUNTEERED]	2.7%

b. (IF "SOMEWHAT OPPOSE" OR "STRONGLY OPPOSE" ASK) Why do you oppose the CWB? (OPEN-END)

Multiple Mention	n=275
Takes Away Farmer Control/Could Market Own Grain	24.0%
Lack of Trust in CWB/Bureaucracy/Mismanagement	8.0%
Wasting Our Money	3.0%
Monopoly/No Competition	20.0%
CWB Ineffective in the Past/Poor Track Record	20.0%
Farmer Payment slow and Not Transparent	1.0%
No accountability/Secretive	5.0%
Jailed Farmers	1.0%
Do Not Get Best Price/Fair Price	18.0%
Need to More/Better Markets	2.0%
Should Look After More Grains/Organic	1.0%
Other	4.0%
Don't Know/No Response [VOLUNTEERED]	16.0%

6. Which of the following best describes your impression of the Canadian Wheat Board compared to two years ago?

	n=1303
More favourable	38.7%
Less favourable	16.6%
No change	44.2%
Don't Know/No response [VOLUNTEERED]	0.5%

7. If you had to choose between three different approaches to marketing wheat, which of the following would you prefer? (RANDOMIZE OPTIONS)

OPTION ONE:

That wheat marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.

OPTION TWO:

The dual marketing option where private companies and individual farmers could compete with the CWB for wheat sales in the domestic and export market.

OPTION THREE:

That there be a totally open market for wheat without the Canadian Wheat Board.

	n=1303
Solely CWB	44.8%
Dual Marketing	47.0%
Open Market	6.7%
Don't Know/No Response [VOLUNTEERED]	1.5%



8. (IF OPTION TWO, “DUAL MARKETING” ASK) Do you agree or disagree with the following statements

a. Private grain marketers – like Cargill, ADM or Agricore – get better prices for wheat than the CWB does

	n=613
Strongly Agree	10.0%
Somewhat Agree	30.1%
Somewhat Disagree	25.2%
Strongly Disagree	12.4%
Don't Know/No Response [VOLUNTEERED]	22.3%

b. You don't like taking a “pooled” price for grain

	n=613
Strongly Agree	15.9%
Somewhat Agree	32.6%
Somewhat Disagree	30.4%
Strongly Disagree	12.9%
Don't Know/No Response [VOLUNTEERED]	8.1%

c. You would like to choose when to deliver and get paid full value for your grain

	n=613
Strongly Agree	66.6%
Somewhat Agree	25.3%
Somewhat Disagree	5.5%
Strongly Disagree	1.0%
Don't Know/No Response [VOLUNTEERED]	1.6%

d. Having more companies compete for your wheat will increase the values you receive

	n=613
Strongly Agree	54.4%
Somewhat Agree	29.8%
Somewhat Disagree	7.8%
Strongly Disagree	4.9%
Don't Know/No Response [VOLUNTEERED]	3.0%

9. If you had to choose between the following two options for wheat marketing, which one would you prefer? **(RANDOMIZE OPTIONS)**

OPTION ONE:

That wheat marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.

OPTION TWO:

That there be a totally open market for wheat without the Canadian Wheat Board.

	n=1303
Solely CWB	62.9%
Open Market	29.6%
Don't Know/No Response [VOLUNTEERED]	7.5%

- b. Would you support that option strongly or just somewhat?

	n=1206
Strongly support	66.7%
Somewhat support	33.2%
Don't Know/No Response [VOLUNTEERED]	0.1%

10. If you had to choose between three different approaches to marketing barley, which of the following would you prefer? **(RANDOMIZE OPTIONS)**

OPTION ONE:

That barley marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.

OPTION TWO:

The dual marketing option where private companies and individual farmers could compete with the CWB for barley sales in the domestic and export market.

OPTION THREE:

That there be a totally open market for barley without the Canadian Wheat Board.

	n=1303
Solely CWB	29.0%
Dual Marketing	45.7%
Open Market	18.7%
Don't Know/No Response [VOLUNTEERED]	6.6%

11. If you had to choose between the following two options for barley marketing, which one would you prefer? **(RANDOMIZE OPTIONS)**

OPTION ONE:

That barley marketing, for export and domestic human consumption, remain the sole responsibility of the Canadian Wheat Board.

OPTION TWO:

That there be a totally open market for barley without the Canadian Wheat Board.

	n=1303
Solely CWB	44.7%
Open Market	45.6%
Don't Know/No Response [VOLUNTEERED]	9.7%

b. Would you support that option strongly or just somewhat?

	n=1178
Strongly support	63.0%
Somewhat support	36.8%
Don't Know/No Response [VOLUNTEERED]	0.3%

12. On a scale of one to five where one is very poor, five is excellent and 2, 3 and 4 are in between, please give your rating of the performance of the Canadian Wheat Board in the marketing of the following grains.

a. Wheat

	n=1303
1, Very Poor	11.1%
2	13.1%
3	23.9%
4	27.9%
5, Excellent	21.6%
Don't Know/No Response [VOLUNTEERED]	2.3%

b. Durum wheat

	n=1303
1, Very Poor	9.9%
2	9.5%
3	18.0%
4	17.2%
5, Excellent	13.6%
Don't Know/No Response [VOLUNTEERED]	31.8%

c. Feed barley

	n=1303
1, Very Poor	18.9%
2	17.4%
3	27.1%
4	13.9%
5, Excellent	7.6%
Don't Know/No Response [VOLUNTEERED]	15.2%

d. Malting barley

	n=1303
1, Very Poor	10.5%
2	11.1%
3	26.3%
4	19.1%
5, Excellent	12.5%
Don't Know/No Response [VOLUNTEERED]	20.5%

13. (IF POOR (1,2) ASK)

a. Why are you dissatisfied with the performance of the CWB in the marketing of wheat?

Multiple Mention	n=315
Make more on open market/Better on own	3.0%
CWB price to low	34.0%
Make no money	6.0%
CWB doing a bad job/Bad marketing	22.0%
Contracts are bad/ Too long to play	6.0%
Deserve freedom/No choice	4.0%
Grading System	1.0%
No movement/Slow	13.0%
Freight posts/Storage	1.0%
Not accountable/Secretive/Not open	3.0%
Too bureaucratic/Too much administration	2.0%
Other	2.0%
Don't Know/No Response [VOLUNTEERED]	22.0%

b. Why are you dissatisfied with the performance of the CWB in the marketing of durum?

Multiple Mention	n=252
Make more on open market/Better on own	2.0%
CWB price to low	22.0%
Make no money	5.0%
CWB doing a bad job/Bad marketing	26.0%
Contracts are bad/ Too long to play	4.0%
Deserve freedom/No choice	5.0%
Do not grow any	1.0%
Grading System	1.0%
No movement/Slow	23.0%
Freight posts/Storage	1.0%
Not accountable/Secretive/Not open	2.0%
Too bureaucratic/Too much administration	2.0%
Other	3.0%
Don't Know/No Response [VOLUNTEERED]	22.0%

c. Why are you dissatisfied with the performance of the CWB in the marketing of Feed Barley?

Multiple Mention	n=473
Make more on open market/Better on own	13.0%
CWB price to low	37.0%
Make no money	5.0%
CWB doing a bad job/Bad marketing	14.0%
Contracts are bad/ Too long to play	3.0%
Deserve freedom/No choice	6.0%
Do not grow any	--
Grading System	--
No movement/Slow	4.0%
Freight posts/Storage	2.0%
Not accountable/Secretive/Not open	--
Too bureaucratic/Too much administration	1.0%
Other	3.0%
Don't Know/No Response [VOLUNTEERED]	24.0%

d. Why are you dissatisfied with the performance of the CWB in the marketing of Malting Barley?

Multiple Mention	n=282
Make more on open market/Better on own	4.0%
CWB price to low	33.0%
Make no money	5.0%
CWB doing a bad job/Bad marketing	15.0%
Contracts are bad/ Too long to play	4.0%
Deserve freedom/No choice	8.0%
Do not grow any	1.0%
Grading System	4.0%
No movement/Slow	13.0%
Freight posts/Storage	5.0%
Not accountable/Secretive/Not open	2.0%
Too bureaucratic/Too much administration	1.0%
Other	3.0%
Don't Know/No Response [VOLUNTEERED]	21.0%

14. Approximately what percentage of your farm receipts come from CWB grains?

	n=1303
< 20	9.7%
20 - 39	23.2%
40 - 59	28.5%
60 - 79	15.3%
80 - 99	8.8%
100	10.4%
Don't Know/No Response [VOLUNTEERED]	4.0%

15. Five years from now, do you see CWB grains as a bigger part of your business than now, a smaller part of your business than now, or about the same as now?

	n=1303
Bigger part	6.7%
Same	58.4%
Smaller part	28.2%
Don't Know/No Response [VOLUNTEERED]	6.8%

16. As far as you are concerned, how does the CWB operate now - is the Canadian Wheat board (ALWAYS RANDOMIZE THESE TWO OPTIONS) run by a Board of Directors **OR** is it run by the federal government?

	n=1303
Run by a board of directors	68.2%
Run by the federal government	24.9%
Don't Know/No Response [VOLUNTEERED]	6.9%

17. Who has more say over major decisions at the CWB, (ALWAYS RANDOMIZE THESE TWO OPTIONS) - farmers **OR** the federal government?

	n=1303
Farmers	30.4%
Federal government	63.2%
Don't Know/No Response [VOLUNTEERED]	6.4%

18. Would the CWB be more effective on behalf of farmers if it had no links at all to the Federal Government – Yes or No?

	n=1303
Yes	51.6%
No	38.2%
Don't Know/No Response [VOLUNTEERED]	10.2%

19. Thinking about what would make your farm more profitable, how important to you would be the following possible initiatives from the CWB. Would it be important, somewhat important, not very important, not important at all?

a. Creating a dual market for wheat

	n=1303
Very Important	31.7%
Somewhat Important	22.3%
Not Very Important	9.6%
Not Important at all	33.8%
Don't Know/No Response [VOLUNTEERED]	2.5%

b. Creating a dual market for barley

	n=1303
Very Important	26.9%
Somewhat Important	30.6%
Important	10.0%
Not Important at all	25.4%
Don't Know/No Response [VOLUNTEERED]	7.1%

c. Advocating strongly for more government assistance for wheat and barley farmers

	n=1303
Very Important	58.5%
Somewhat Important	20.9%
Not Very Important	9.6%
Not Important at all	8.8%
Don't Know/No Response [VOLUNTEERED]	2.3%

d. Building on existing programs like producer payment options to provide more flexible pricing

	n=1303
Very Important	41.2%
Somewhat Important	35.6%
Not Very Important	11.5%
Not Important at all	8.2%
Don't Know/No Response [VOLUNTEERED]	3.5%

e. Getting more deeply involved in grain transportation

	n=1303
Very Important	43.5%
Somewhat Important	30.4%
Not Very Important	10.1%
Not Important at all	11.9%
Don't Know/No Response [VOLUNTEERED]	4.0%

f. Working with producers to create more value added processing in the prairies

	n=1303
Very Important	61.8%
Somewhat Important	23.4%
Not Very Important	8.4%
Not Important at all	4.9%
Don't Know/No Response [VOLUNTEERED]	1.5%

g. Investing in joint ventures with international customers of western Canadian wheat to process the wheat

	n=1303
Very Important	31.7%
Somewhat Important	39.0%
Not Very Important	9.3%
Not Important at all	14.9%
Don't Know/No Response [VOLUNTEERED]	5.0%

h. Branding western Canadian wheat as a unique high value product

	n=1303
Very Important	58.8%
Somewhat Important	23.9%
Not Very Important	10.5%
Not Important at all	4.8%
Don't Know/No Response [VOLUNTEERED]	2.0%

i. Bulk buying of inputs like chemicals to achieve lower prices for farmers

	n=1303
Very Important	47.3%
Somewhat Important	20.7%
Not Very Important	8.8%
Not Important at all	20.4%
Don't Know/No Response [VOLUNTEERED]	2.7%

20. How familiar are you with the term “value added” as it relates to grains and oilseeds – very familiar, somewhat familiar, not very familiar or not at all familiar?

	n=1303
Very familiar	33.4%
Somewhat familiar	45.9%
Not very familiar	13.3%
Not at all familiar	6.8%
Don't Know/No Response [VOLUNTEERED]	0.6%

21. (if very, somewhat or not very familiar) Different people have different definitions of “value added”. As you think of the term, how well does it apply to each of the following (applies very well, applies somewhat, does not apply)

a. Wheat and other grains being processed on the prairies, rather than shipping it to be processed

	n=1207
Applies very well	59.1%
Applies somewhat	33.6%
Does not apply	5.9%
Don't Know/No Response [VOLUNTEERED]	1.4%

b. Farmer involvement in processing wheat and other grains, whether on the prairies or in consumer locations around the world, in order to gain higher returns from the product

	n=1207
Applies very well	51.1%
Applies somewhat	39.8%
Does not apply	7.3%
Don't Know/No Response [VOLUNTEERED]	1.8%

c. Anything farmers do to the wheat or other grains they grow that adds value above and beyond the market price they would normally receive for their raw product.

	n=1207
Applies very well	59.1%
Applies somewhat	32.6%
Does not apply	6.8%
Don't Know/No Response [VOLUNTEERED]	1.5%

22. Do you see the CWB more as an organization that markets grain on your behalf internationally, or as an organization that buys your grain from you?

	n=1303
Markets grain on your behalf internationally	66.9%
Organization that buys your grain	28.9%
Don't Know/No Response [VOLUNTEERED]	4.2%

23. The CWB has introduced some pricing options such as fixed price contracts, basis contracts, guaranteed delivery contracts and early payment options. How familiar are you with those –very familiar, somewhat familiar, not very familiar or not at all familiar?

	n=1303
Very familiar	16.9%
Somewhat familiar	54.8%
Not very familiar	21.0%
Not at all familiar	7.2%
Don't Know/No Response [VOLUNTEERED]	0.1%

24. The CWB has introduced a Daily Price Contract under its Producer Payment Options programs. This contract enables farmers to price their grain using a daily cash price based on U.S. elevator prices. The DPC will provide farmers with choices to allow them earlier cash flow and increased pricing flexibility. How familiar are you with this, very familiar, somewhat familiar, not very familiar or not at all familiar?

	n=1303
Very familiar	11.9%
Somewhat familiar	42.3%
Not very familiar	27.9%
Not at all familiar	17.3%
Don't Know/No Response [VOLUNTEERED]	0.6%

25. Are you very interested, somewhat interested, not very interested or not at all interested in using this contract to manage pricing risk on your farm?

	n=1303
Very interested	16.3%
Somewhat interested	51.2%
Not very interested	15.8%
Not at all interested	14.6%
Don't Know/No Response [VOLUNTEERED]	2.1%

26. How closely have you been following the World Trade Organization talks and their impact on agriculture – very, somewhat, not very, not at all?

	n=1303
Very closely	14.5%
Somewhat closely	50.4%
Not very closely	22.7%
Not at all	12.1%
Don't Know/No Response [VOLUNTEERED]	0.3%

27. Are you aware that the WTO has demanded, and the federal government has agreed to eliminate the federal guarantee of CWB initial payments and borrowing – very aware, heard something, heard nothing?

	n=1303
Very aware	31.2%
Heard something	22.7%
Heard nothing	45.1%
Don't Know/No Response [VOLUNTEERED]	0.9%

28. Will this have a major impact on you, some impact on you or no impact on you?

	n=1303
Major impact	30.2%
Some impact	46.3%
No impact	18.8%
Don't Know/No Response [VOLUNTEERED]	4.7%

29. Some/Other people say that the federal government should provide compensation for the elimination of the initial payment and borrowing guarantees. Others/Some say that the initial payment and borrowing guarantees were an important part of getting WTO agreements to a level playing field for agricultural producers around the world and therefore no federal government compensation is needed once eliminated. Which of these two opinions is closest to your own?

	n=1303
Government should provide compensation	68.3%
No federal compensation needed	22.4%
Don't Know/No Response [VOLUNTEERED]	9.3%

30. If there were to be compensation, there are a number of ways of delivering that. On a scale of one to five, where one means not appropriate at all and five means very appropriate, how appropriate would it be for the government to...

a. Put a value on the guarantee and distribute that to farmers directly

	n=1303
1, Not at all appropriate	8.0%
2	8.2%
3	17.9%
4	21.3%
5, Very appropriate	39.9%
Don't Know/No Response [VOLUNTEERED]	4.7%

b. Put a value on the guarantee and provide that to the CWB so the CWB can continue to provide initial price guarantees and continue to borrow at low interest rates.

	n=1303
1, Not at all appropriate	8.3%
2	4.8%
3	16.6%
4	19.4%
5, Very appropriate	46.7%
Don't Know/No Response [VOLUNTEERED]	4.3%

31. Which of the two options mentioned earlier would you say is the most appropriate? Would that be distributing to farmers directly or providing it to the CWB so the CWB can continue to provide initial price guarantees and can continue to borrow at low interest rates?

	n=1303
To farmers	48.1%
To CWB	46.7%
Don't Know/No Response [VOLUNTEERED]	5.1%

32. There are a number of ideas about how the CWB could change the way it operates. Please tell me whether you would strongly support, somewhat support, somewhat oppose or strongly oppose each of the following moves by the CWB: (Read and Randomize)

a. Disbanding the CWB and leaving the marketing of western Canadian wheat to private grain companies

	n=1303
Strongly support	9.2%
Somewhat support	14.8%
Somewhat oppose	16.0%
Strongly oppose	57.9%
Don't Know/No Response [VOLUNTEERED]	2.2%

b. CWB marketing Canola on a voluntary basis

	n=1303
Strongly support	22.7%
Somewhat support	41.7%
Somewhat oppose	11.6%
Strongly oppose	16.8%
Don't Know/No Response [VOLUNTEERED]	7.2%

c. CWB taking responsibility for marketing additional grains should farmers want to use the CWB to do so

	n=1303
Strongly support	30.1%
Somewhat support	44.3%
Somewhat oppose	9.7%
Strongly oppose	12.6%
Don't Know/No Response [VOLUNTEERED]	3.3%

d. CWB dropping responsibility for barley marketing and only marketing wheat

	n=1303
Strongly support	13.6%
Somewhat support	26.9%
Somewhat oppose	23.4%
Strongly oppose	29.9%
Don't Know/No Response [VOLUNTEERED]	6.2%

e. CWB investing in joint ventures with producers to process Canadian wheat or barley here on the prairies

	n=1303
Strongly support	38.8%
Somewhat support	39.5%
Somewhat oppose	9.0%
Strongly oppose	10.6%
Don't Know/No Response [VOLUNTEERED]	2.0%

f. **If opposed**, ask: I will now read three possible reasons people could be opposed to the CWB getting into investments in processing. Which of these would be closest to your own opinion?

1. Value added processing is not the CWB's job and the CWB should stick solely to marketing activities
2. You are concerned that the investments might not be successful and would end up costing farmers money
3. You do not have confidence that the CWB has the expertise to make and manage these investments well

	n=256
Not the CWB's job/CWB should stick to marketing activities	47.3%
Investments might not be successful/Cost farmers money	17.7%
No confidence CWB has expertise to manage these investments	28.8%
Don't Know/No Response [VOLUNTEERED]	6.3%

g. CWB investing in joint ventures with CWB customers to process Canadian wheat or barley in other countries

	n=1303
Strongly support	17.9%
Somewhat support	38.8%
Somewhat oppose	17.4%
Strongly oppose	21.6%
Don't Know/No Response [VOLUNTEERED]	4.2%

h. **If opposed**, ask: I will now read four possible reasons people could be opposed to the CWB getting into investments in processing. Which of these would be closest to your own opinion?

1. Value added processing is not the CWB's job and the CWB should stick solely to marketing activities
2. You are concerned that the investments might not be successful and would end up costing farmers money
3. You do not have confidence that the CWB has the expertise to make and manage these investments well
4. You do not think the CWB should be investing in projects outside of Canada

	n=510
Not the CWB's job/CWB should stick to marketing activities	29.2%
Investments might not be successful/Cost farmers money	14.7%
No confidence CWB has expertise to manage these investments	13.5%
CWB should not be investing in projects outside of Canada	38.9%
Don't Know/No Response [VOLUNTEERED]	3.6%

i. CWB investing in joint ventures with producers to buy storage or handling facilities on the Prairies or at the port

	n=1303
Strongly support	21.2%
Somewhat support	42.3%
Somewhat oppose	16.3%
Strongly oppose	16.8%
Don't Know/No Response [VOLUNTEERED]	3.5%

j. **If opposed**, ask: I will now read four possible reasons people could be opposed to the CWB getting into investments in storage or handling. Which of these would be closest to your own opinion?

1. Storage and handling is not the CWB's job and the CWB should stick solely to marketing activities
2. You are concerned that the investments might not be successful and would end up costing farmers money
3. You do not have confidence that the CWB has the expertise to make and manage these investments well

	n=431
Not the CWB's job/CWB should stick to marketing activities	54.0%
Investments might not be successful/Cost farmers money	21.0%
No confidence CWB has expertise to manage these investments	22.0%
Don't Know/No Response [VOLUNTEERED]	2.9%

k. CWB completely breaking from the federal government and being completely run and controlled by a farmer elected board of directors

	n=1303
Strongly support	34.5%
Somewhat support	35.0%
Somewhat oppose	15.2%
Strongly oppose	10.8%
Don't Know/No Response [VOLUNTEERED]	4.5%

33. If a fundamental change to the CWB is to be made, such as ending the single desk and making the CWB voluntary, which of the following is the most appropriate way of making that decision – a decision by the federal government, by electing CWB directors who share that opinion about the CWB, or by a plebiscite or referendum among farmers?

	n=1303
Decision by the federal government	7.9%
Electing CWB directors who share that opinion	13.1%
A plebiscite or referendum among farmers	74.6%
Don't Know/No Response [VOLUNTEERED]	4.4%

34. Some people say that the CWB directors should be elected by a vote in which every CWB permit book holder's vote is worth the same. Other people say that the CWB directors should be elected by a weighted ballot in which votes of larger farmers would be worth more than votes of smaller farmers. Which of those two views is closer to your own?

	n=1303
Every vote worth the same	76.8%
Weighted Ballot	20.7%
Don't Know/No Response [VOLUNTEERED]	2.5%

35. Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you agree or disagree with each statement. (IF AGREE/DISAGREE ASK) Would that be strongly or just somewhat agree/disagree?

a. A dual market for grain would not necessarily mean the end of the Canadian Wheat Board

	n=1303
Strongly Agree	27.0%
Somewhat Agree	32.4%
Somewhat Disagree	11.8%
Strongly Disagree	25.8%
Don't Know/No Response [VOLUNTEERED]	3.0%

b. Canadian farmers get better prices for grain because of the Canadian Wheat Board

	n=1303
Strongly Agree	33.8%
Somewhat Agree	28.2%
Somewhat Disagree	15.0%
Strongly Disagree	19.1%
Don't Know/No Response [VOLUNTEERED]	4.0%

c. I think if the Wheat Board had competition it would provide better service

	n=1303
Strongly Agree	29.5%
Somewhat Agree	28.8%
Somewhat Disagree	15.3%
Strongly Disagree	24.7%
Don't Know/No Response [VOLUNTEERED]	1.7%

d. I think if the Wheat Board had competition I would get better prices for my grain

	n=1303
Strongly Agree	28.6%
Somewhat Agree	24.9%
Somewhat Disagree	17.3%
Strongly Disagree	27.2%
Don't Know/No Response [VOLUNTEERED]	2.0%

e. I am very confident that I could market my own wheat without the CWB

	n=1303
Strongly Agree	16.1%
Somewhat Agree	19.7%
Somewhat Disagree	22.3%
Strongly Disagree	40.0%
Don't Know/No Response [VOLUNTEERED]	1.9%

f. I am very confident that I could market my own barley without the CWB

	n=1303
Strongly Agree	29.0%
Somewhat Agree	26.6%
Somewhat Disagree	15.9%
Strongly Disagree	20.6%
Don't Know/No Response [VOLUNTEERED]	7.9%

g. The Canadian Wheat Board provides me with a sense of security

	n=1303
Strongly Agree	36.4%
Somewhat Agree	35.8%
Somewhat Disagree	13.7%
Strongly Disagree	13.1%
Don't Know/No Response [VOLUNTEERED]	1.0%

h. When all is said and done, I have more confidence in the Canadian Wheat Board to protect my interests than a U.S. company

	n=1303
Strongly Agree	63.0%
Somewhat Agree	18.6%
Somewhat Disagree	8.2%
Strongly Disagree	7.0%
Don't Know/No Response [VOLUNTEERED]	3.3%

i. If farming is going to continue to be a viable business in this country the federal government is going to have to provide the same kind of financial support to farmers that other countries do

	n=1303
Strongly Agree	75.4%
Somewhat Agree	17.7%
Somewhat Disagree	3.0%
Strongly Disagree	2.7%
Don't Know/No Response [VOLUNTEERED]	1.1%



j. I would like to see the CWB speak up for farmers more often

	n=1303
Strongly Agree	61.6%
Somewhat Agree	26.8%
Somewhat Disagree	4.5%
Strongly Disagree	5.0%
Don't Know/No Response [VOLUNTEERED]	2.1%

k. The fact that the government still appoints people to the CWB Board of Directors tells me that the government is still trying to control the CWB

	n=1303
Strongly Agree	36.7%
Somewhat Agree	39.2%
Somewhat Disagree	14.0%
Strongly Disagree	7.2%
Don't Know/No Response [VOLUNTEERED]	2.8%

l. A dual market for wheat would be ideal, but is practically unworkable

	n=1303
Strongly Agree	24.2%
Somewhat Agree	21.9%
Somewhat Disagree	22.9%
Strongly Disagree	24.8%
Don't Know/No Response [VOLUNTEERED]	6.3%

m. The new government should as it said in the election end the CWB single desk and implement a dual market for CWB grains

	n=1303
Strongly Agree	26.8%
Somewhat Agree	23.1%
Somewhat Disagree	10.9%
Strongly Disagree	37.1%
Don't Know/No Response [VOLUNTEERED]	2.2%

n. Any decision to end the CWB single desk and implement a dual market should be made by farmers and not by the federal government

	n=1303
Strongly Agree	68.5%
Somewhat Agree	20.5%
Somewhat Disagree	5.2%
Strongly Disagree	3.3%
Don't Know/No Response [VOLUNTEERED]	2.6%



o. International trade agreements like the WTO are, on balance, good for farmers

	n=1303
Strongly Agree	8.9%
Somewhat Agree	34.0%
Somewhat Disagree	23.2%
Strongly Disagree	24.2%
Don't Know/No Response [VOLUNTEERED]	9.7%

p. Grain companies such as Agricore or Cargill have my best interest at heart

	n=1303
Strongly Agree	5.8%
Somewhat Agree	18.2%
Somewhat Disagree	25.6%
Strongly Disagree	47.1%
Don't Know/No Response [VOLUNTEERED]	3.3%

q. The change of government in Ottawa has me feeling more positively about the future of my farm

	n=1303
Strongly Agree	20.1%
Somewhat Agree	35.0%
Somewhat Disagree	19.7%
Strongly Disagree	18.2%
Don't Know/No Response [VOLUNTEERED]	7.0%

r. I am against anything that would weaken the Canadian Wheat Board

	n=1303
Strongly Agree	41.7%
Somewhat Agree	22.5%
Somewhat Disagree	16.8%
Strongly Disagree	16.9%
Don't Know/No Response [VOLUNTEERED]	2.2%

s. If we had a great marketing campaign for Canadian grain, we could get a premium price for our product

	n=1303
Strongly Agree	27.0%
Somewhat Agree	43.7%
Somewhat Disagree	15.9%
Strongly Disagree	7.1%
Don't Know/No Response [VOLUNTEERED]	6.2%



36. There has been much discussion about the financial position of farmers in Western Canada. I want to get a bit of information on how current circumstances have affected you personally.

a. Do you expect your farm operation to make a profit this year or will it lose money?

	n=1303
Make a profit	25.0%
Lose Money	69.8%
Don't Know/No Response [VOLUNTEERED]	5.2%

b. Among the following options, which best describes your situation?

	n=1303
Will not make it, financially, past this year	5.6%
Will make it past this year, but if the next couple are the same, will be out of business	52.1%
Not making as much money as I would like, but am in no real danger of going out of business	35.1%
Am doing just fine	4.6%
Don't Know/No Response [VOLUNTEERED]	2.6%

37. What percentage of your household income comes from farm income and what percentage Comes from off farm income?

a. Farm Income

	n=1303
0-39%	21.3%
40-60%	19.6%
61-100%	57.3%
Don't Know/No Response [VOLUNTEERED]	1.8%

b. Off Farm Income

	n=1303
0-39%	57.3%
40-60%	19.7%
61-100%	21.2%
Don't Know/No Response [VOLUNTEERED]	1.7%

38. Did you vote in the last CWB election that you were eligible to vote in?

	n=1303
Yes	65.8%
No	31.9%
Don't Know/No Response [VOLUNTEERED]	2.3%

(IF NOT) WHY NOT?

Multiple Mention	n=415
Dislike CWB/No Faith in CWB	4.0%
No ballot	7.0%
No election in my district/acclamation	1.0%
Do not care/Apathy/Forgot	19.0%
Unaware of election	5.0%
Too busy/No time	10.0%
Away/Could not make it	5.0%
No use/Makes no difference	7.0%
Do not know/like candidates/Could not decide	10.0%
Other	2.0%
Don't Know/No Response [VOLUNTEERED]	34.0%

39. What is your approximate age?

	n=1303
Under 35	7.5%
35 to 44	15.9%
45 to 54	30.2%
55 to 64	28.1%
65 and over	18.1%
No Response [VOLUNTEERED]	0.2%

40. What size is your farming operation in cultivated acres? (OPEN-ENDED)

	n=1303
< 640 Acres	23.7%
640 – 1279 Acres	29.6%
1280-2500 Acres	26.8%
> 2500 Acres	18.5%
No Response [VOLUNTEERED]	1.6%

41. Is your farm solely a grain operation or is it a mixed operation including livestock?

	n=1303
Grain Only	56.4%
Mixed – Grain and Livestock	43.5%
No Response [VOLUNTEERED]	0.1%

42. Do you grow barley?

	n=1303
Yes	69.0%
No	30.9%
Don't Know/No Response [VOLUNTEERED]	0.1%

43. Do you grow Canola?

	n=1303
Yes	67.3%
No	32.6%
Don't Know/No Response [VOLUNTEERED]	0.1%

44. How many acres of wheat, including durum wheat did you grow last year?

	n=1303
None	10.3%
Under 100 acres	7.2%
101 to 250 acres	21.0%
251 to 500 acres	23.1%
501 to 1000	20.7%
Over 1000 acres	15.6%
Don't Know/No Response [VOLUNTEERED]	2.0%

45. Region – RECORD – DO NOT ASK

	n=1303
Alberta	25.7%
Saskatchewan	59.7%
Manitoba	14.5%

46. Electoral District – RECORD – DO NOT ASK

	n=1303
1	5.4%
2	7.9%
3	14.4%
4	12.4%
5	7.3%
6	10.8%
7	9.9%
8	13.1%
9	10.0%
10	8.8%