

CWB 2007 Producer's Survey Results

April, 2007

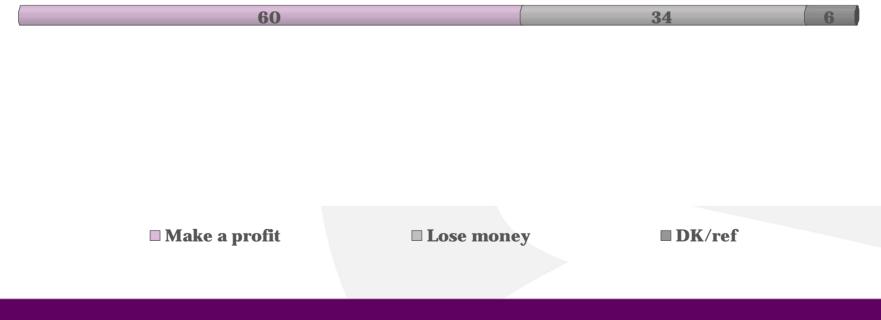


Demographics

Under 35	8
35 to 44	14
45 to 54	28
55 to 64	28
65+	21
Under 30K	15
30K – 60K	26
60K – 100K	13
+100K	26
Grade 8 or less	5
Some high school	15
Complete high school	31
College/vocational post-secondary	22
Some University	7
Complete University degree	15
Post Graduate Degree	4



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



the gandalf group Farm To Make Profit: Tracking

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





Among the following options, which best describes your situation?

16 45 34 3 3

Am doing just fine
 May be out of business in a few years
 DK/ref

In no real danger of going out of business
Will not make it, financially, past this year

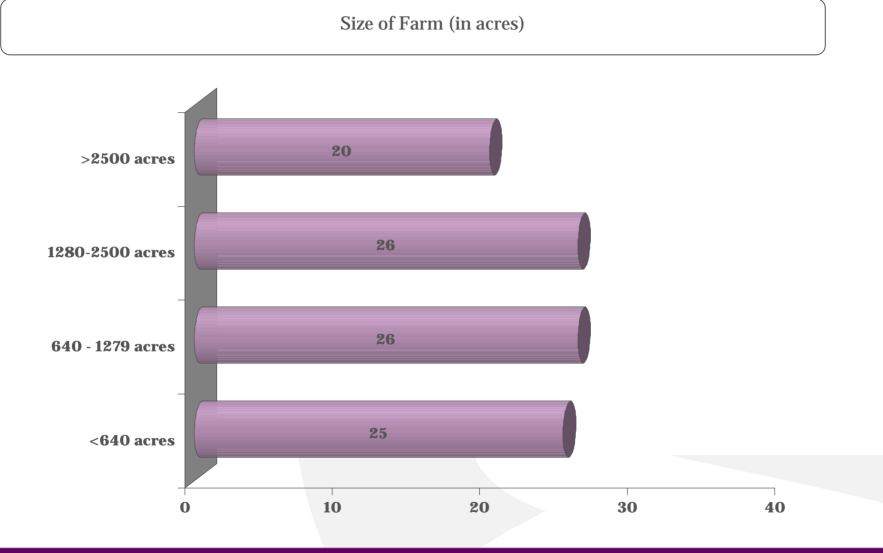


Percentage of your farm receipts come from CWB grains?





Size of Farm





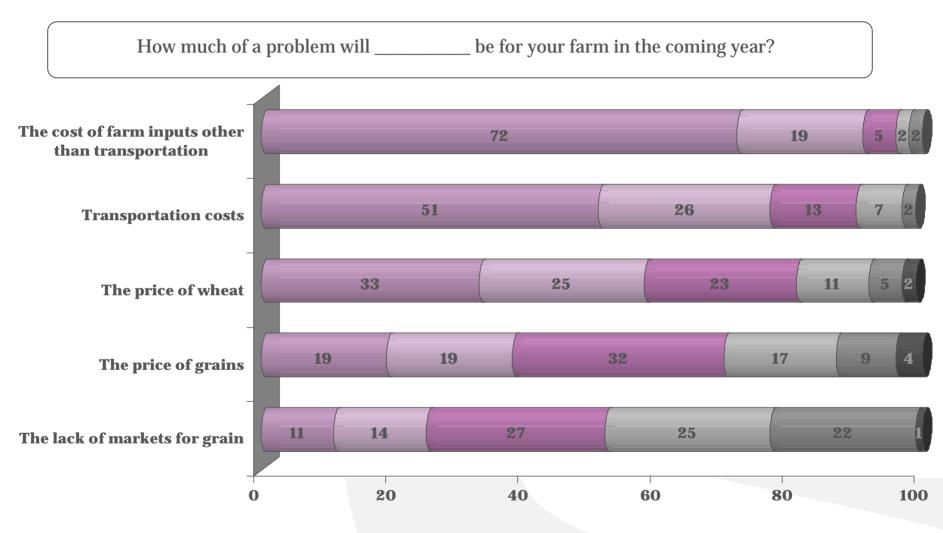
Outlook for Farming

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

12 51 11 14 12

Much more optimistic
 Somewhat more pessimistic
 Somewhat more pessimistic
 Much more pessimistic
 DK/ref





■ A big problem ■ Somewhat of a problem ■ Not an issue ■ Not really a problem ■ Not a problem at all ■ DK/ref



the gandalf group Rating of the CWB: Marketing of Wheat

Please give your rating of the performance of the Canadian Wheat Board in the marketing of wheat?

1	27		27	21	12	12 2	
	Excellent	Goo	d Moderately good	l Poor	Very poor	■ DK/ref	



Rating of the CWB: Marketing of Feed Barley

Please give your rating of the performance of the Canadian Wheat Board in the marketing of feed barley?

-					
7	18	24	16	23	12





Rating of the CWB: Marketing of Malting Barley

Please give your rating of the performance of the Canadian Wheat Board in the marketing of malting barley?

15 21	21	12	16	14
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Views Close to Your Own

Are the views of ______ very close, somewhat close, not very close or not close at all to your own? CWB **Agricore United Canadian Federation of Agriculture** Saskatchewan Wheat Pool Western Canadian Wheat Growers James Richardson Ltd. National Farmer's Union **Federal Government** Agr. Minister Chuck Strahl **Western Barley Growers Association** Cargill **Real Voice for Choice Marketing Choice Alliance** O **Very close** ■ Somewhat close **Not very close** Not close at all ■ DK/ref



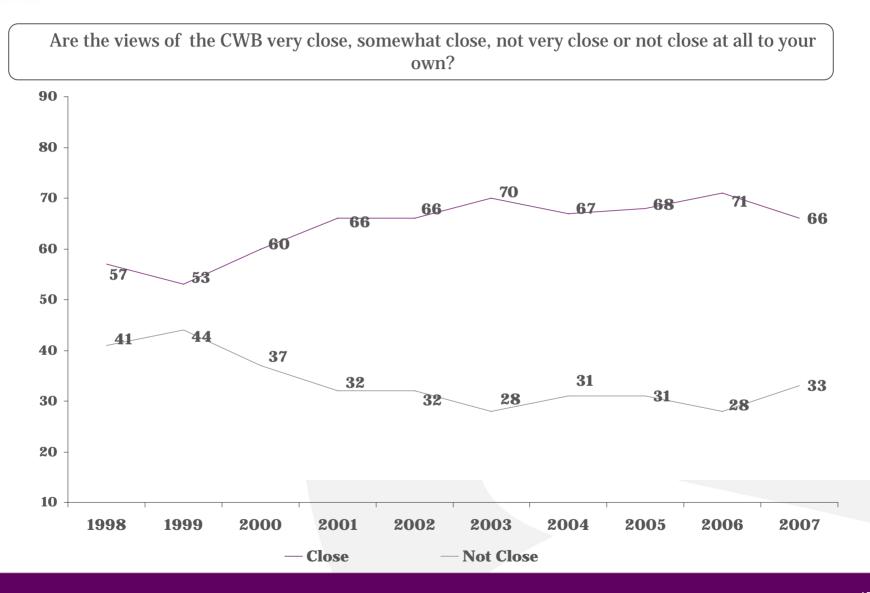
Views Close to Your Own: CWB

Are the views of the CWB very close, somewhat close, not very close or not close at all to your own?

33 33 13	20 1
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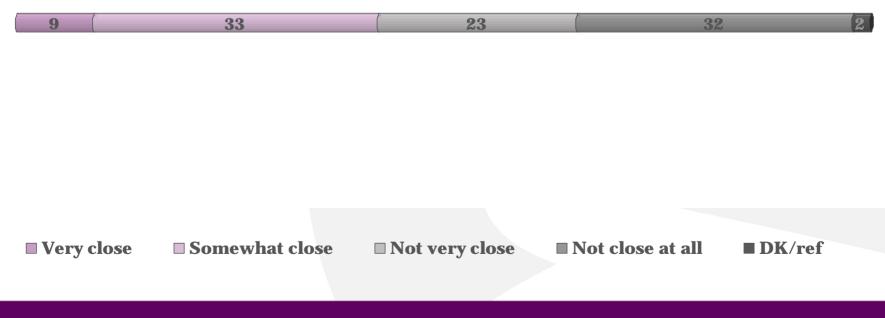
the gandalf group





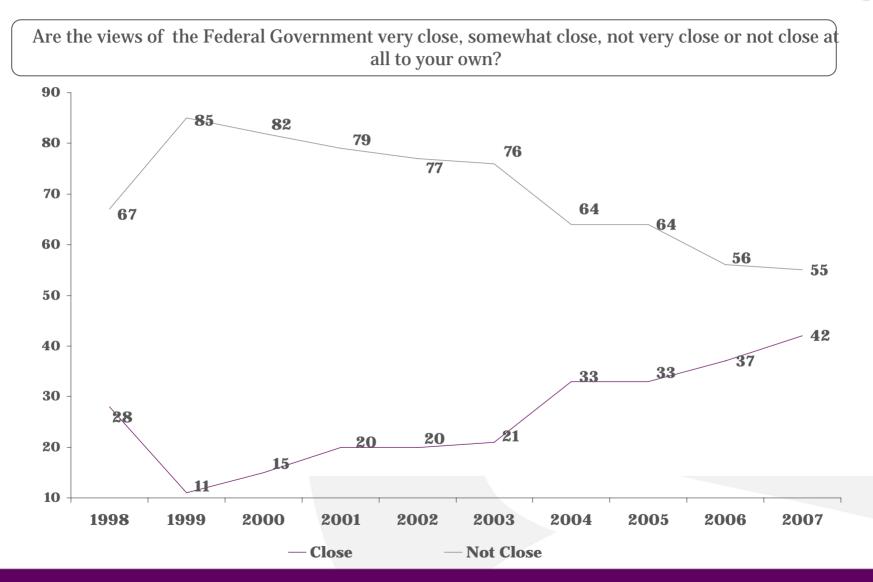
Views Close to Your Own: Federal Government

Are the views of the Federal Government very close, somewhat close, not very close or not close at all to your own?





Views Close to Your Own: Federal Government – Tracking





Support or Oppose CWB

Do you support or oppose the Canadian Wheat Board?

|--|

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose ■ DK/ref



the gandalf group Support or Oppose CWB: Tracking

Do you support or oppose the Canadian Wheat Board?



■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose ■ DK/ref



Impression of CWB

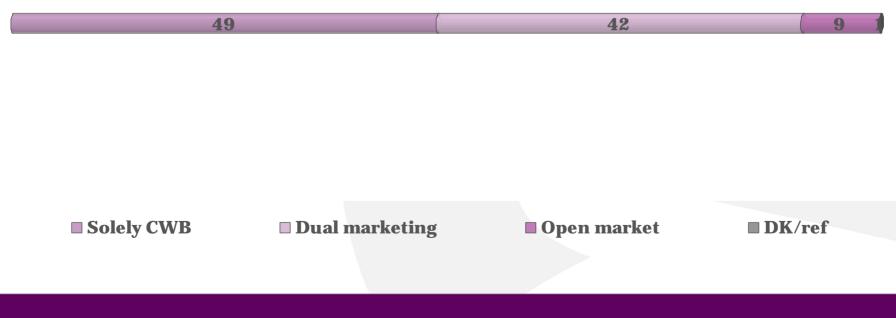
Which of the following best describes your impression of the Canadian Wheat Board compared to two years ago?

41		43	15 1
More favourable	🗆 No chang	e 🛛 Less favourable	DK/ref

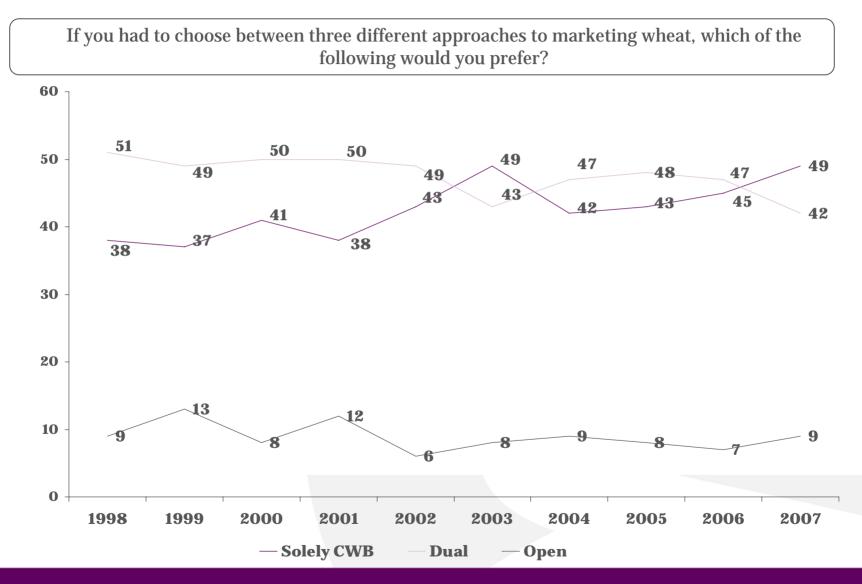


Approaches to Marketing Wheat

If you had to choose between three different approaches to marketing wheat, which of the following would you prefer?



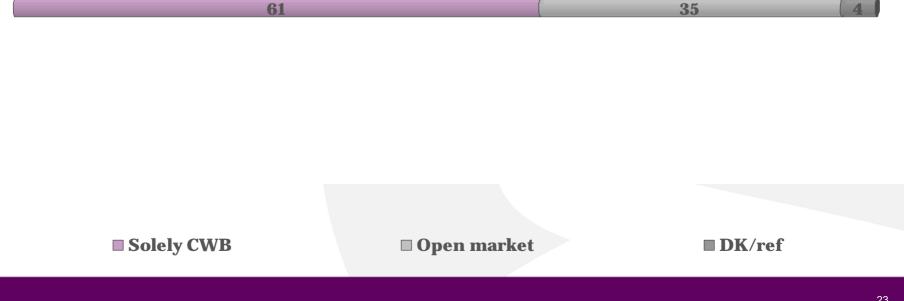




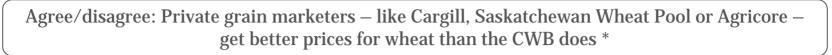


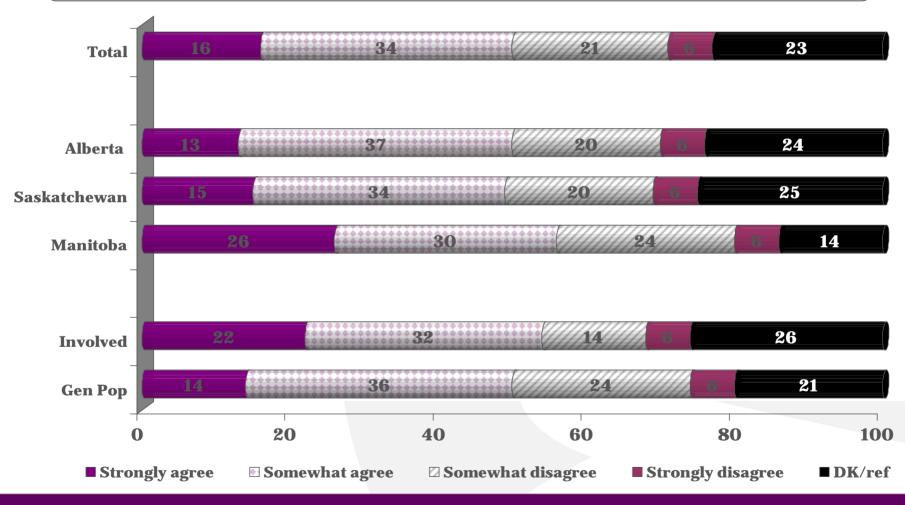
Options For Wheat Marketing

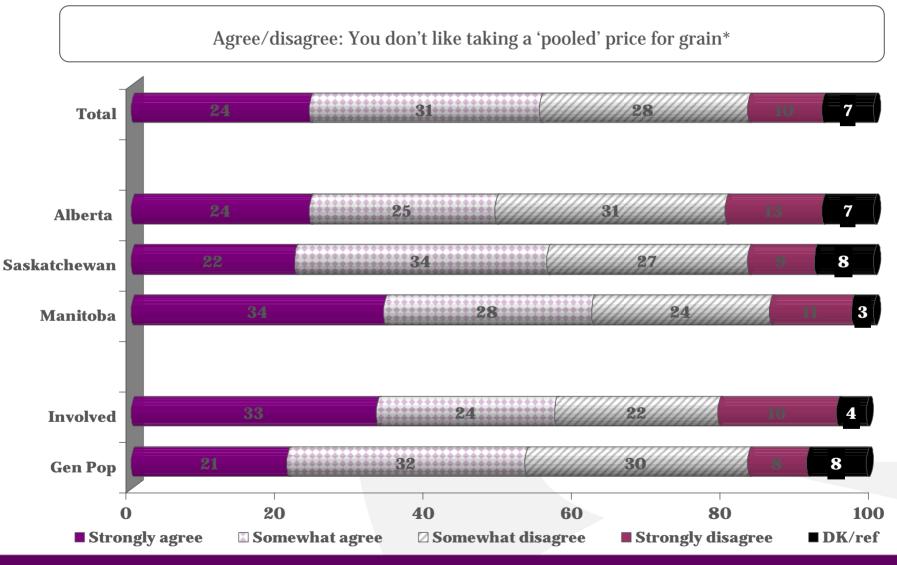
If you had to choose between the following two options for wheat marketing, which one would you prefer?







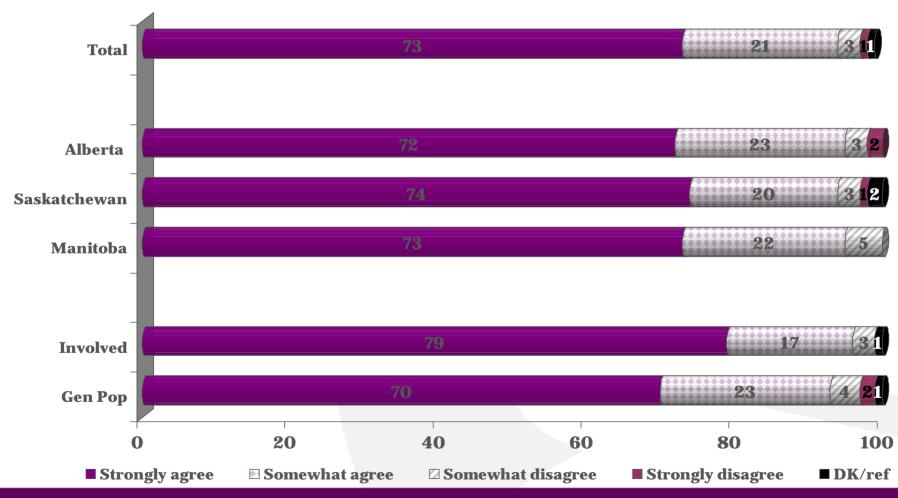






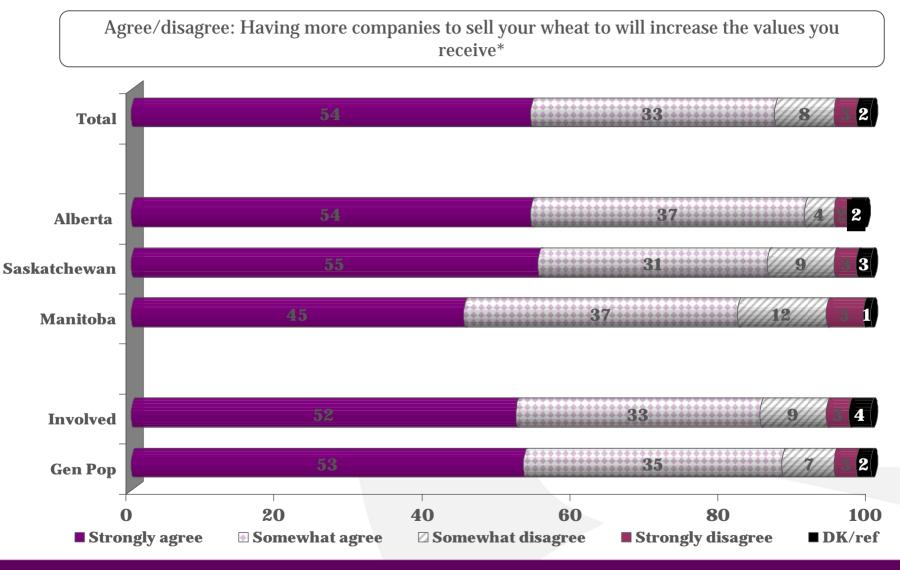
Agree/Disagree: Choose When to Deliver and Get Paid Up Front

Agree/disagree: You would like to choose when to deliver and get paid up front for your grain*





Agree/Disagree: More Companies Will Increase Values





Options For Barley Marketing

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

36	42	19	4





Agree/Disagree: Opening Barley Market End CWB?

Agree/disagree: If I thought that opening up the barley market would lead to the end of the CWB, I wouldn't have chosen that option*

24 18	21	32	5
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■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ DK/ref



Options For Barley Marketing

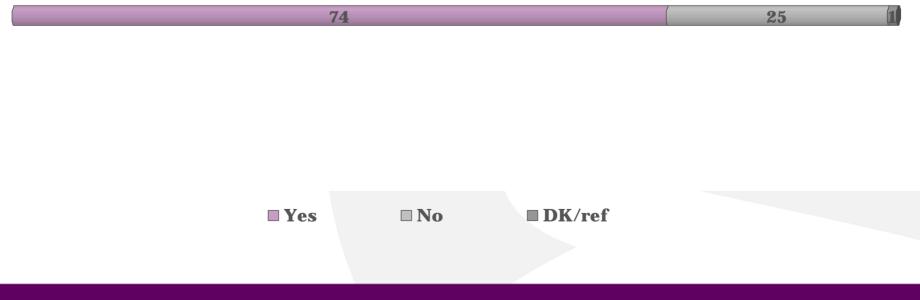
If you had to choose between the following two options for barley marketing, which one would you prefer?

48	46	6
Solely CWB	Open market DK/ref	
		30



Eligible to Vote in Plebiscite

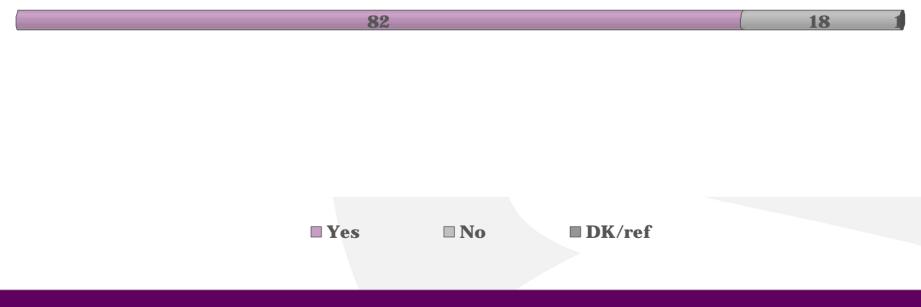
Were you eligible to vote in the federal government's recent plebiscite on barley marketing?





Did You Vote in Plebiscite

Did you vote in the plebiscite?





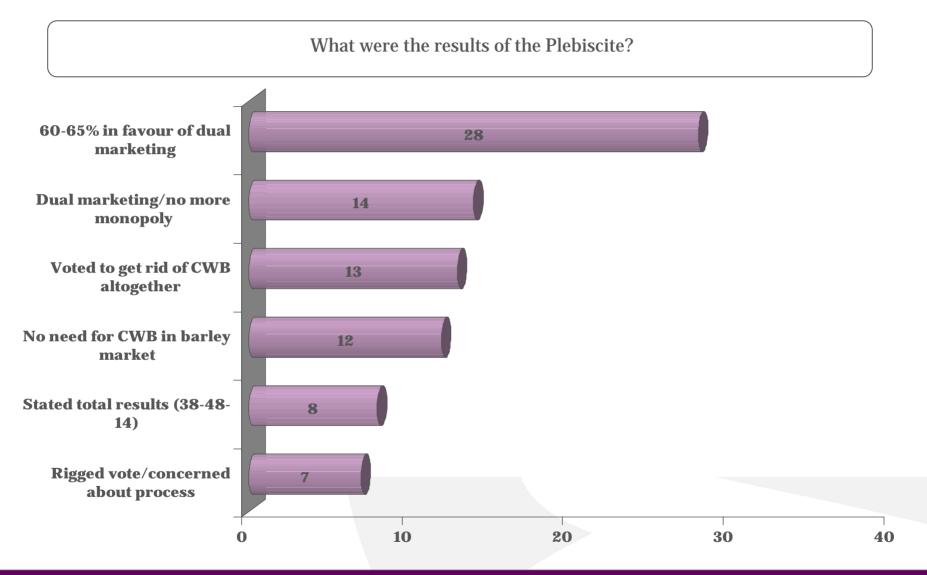
How familiar are you with the results of the plebiscite?

40	40	11	9
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□ Very familiar □ Somewhat familiar □ Not very familiar □ Not at all familiar □ DK/ref



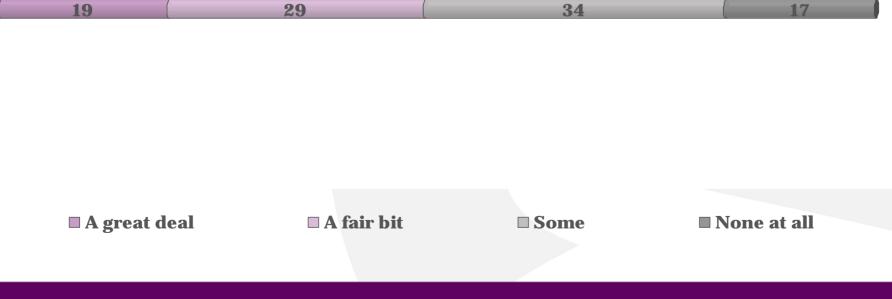
Results of Plebiscite





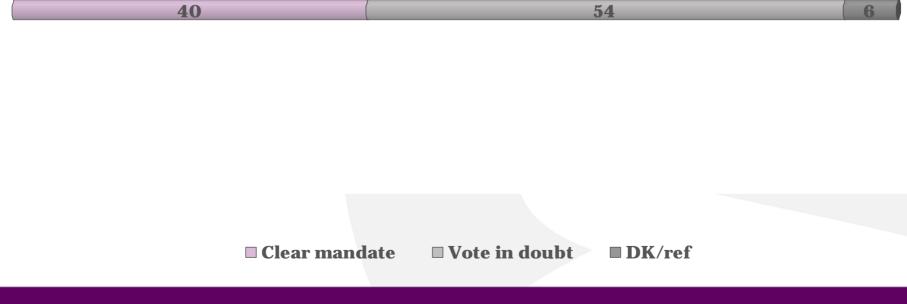
Paid Attention to Plebiscite

How much attention did you pay to the plebiscite campaign?





Which of the following two views is closer to your own? The plebiscite has resulted in a clear mandate from farmers OR the wording of the questions has left the meaning of the vote in doubt.





Which of the following two views is closer to your own? If the government moves to completely open up the barley market, the CWB remains strong and viable OR the government should now move to completely open market no matter what the consequences on the CWB are.

60	33	7

■ DK/ref



Views on the Government's Approach to the CWB

Which of the following two views is closer to your own? Some people support the approach the federal government has taken to the CWB OR other people oppose the approach the federal government has taken to the CWB.

40	55	6
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□ Support federal government's approach □ Oppose federal government's approach □ DK/ref



Views on the Barley Market

Which of the following two views is closer to your own? How the CWB does in the barley market without the single desk will show us how they would fare in a dual market for wheat OR the barley and wheat markets are different.

3	8	51	11

■ Would show how CWB would do



Views on the Dual Marketing

Which of the following two views is closer to your own? If a dual market works for barley it will work for wheat OR a dual market for barley might work because barley is a small part of the CWB, but a dual market for wheat would never work.

43	48	9
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□ Works for barley, will work for wheat □ Works for barley, would never work for wheat ■ DK/ref



Which of the following two views is closer to your own? We will know right away what the impacts of ending the CWB single desk are OR we won't know the true effects for several years

	ŕ.	P.
37	57	5

□ Will know right away the effects □ Will not know effects for several years □ DK/ref



Which of the following two views is closer to your own? This plebiscite has been well run and they have confidence in the results OR the plebiscite has been poorly run, with a confusing question and irregularities around the voters lists and ballots

38	55	7
🗆 Well run	DK/ref	



Agreement With Statements: Top Tier

Agree/Disagree:

		F	
CWB Chair Ken Ritter says there is no point the CWB being involved in marketing a product if they cannot add any value on top of what a private company would do	39	26	17 16 3
CWB Chair Ken Ritter says that without a single desk the CWB will not be able to bring any greater value than a private company	38	25	16 17 5
Alberta Agriculture Minister Groenveld said "Alberta's producers have once again voted in favour of innovation, and choice"	35	28	11 19 7
Minister Strahl says "we have delivered on our promise to give farmers a voice on the future of barley marketing in western Canada"	31	31	12 24 3
Saskatchewan Agriculture Minister Wartman says the plebiscite was designed to manufacture consent so the federal government could get the result it wanted	41	18	13 24 4
CWB Chair Ken Ritter says the government Aug 1 timetable is unrealistic and "you can't say we want the whole industry to turn on its head in the next three months"	38	21	15 21 5
Minister Strahl says "over 60% of producers want to decide how to market their own product"	37	20 1	2 28 3
The Market Choice Alliance says that it is morally and constitutionally wrong to have a monopoly that only governs farmers in Western Canada	39	(17 (16 25 3
) 20	40 60	80 100
Strongly agree Somewhat agree Somew	hat disagree	Strongly disa	gree DK/ref



the gandalf group Agreement With Statements: Bottom Tier

Agree/Disa	gree:					
Real Voice for Choice says it has concerns over how the vote was run and the way the questions were worded because it made it difficult for producers to know which option they wanted to choose		35	21	11	28	5
CWB Chair Ken Ritter says without a radical transformation of the CWB into a grain company with a complete range of physical assets and a capital infusion, the CWB will not be able to market barley		29	24	20	20	7
Former agriculture Minister Ralph Goodale said "having a little bit of both is a complete impossibility. Either you have a single desk or you don't"		41	12	16	28	2
- CWB Chair Ken Ritter says "the murky questions used by Minister Strahl only served to make the government's plebiscite meaningless"		31	20	15	28	6
- Manitoba Agriculture Minister Wowchuk said the barley vote was flawed, unfair and undemocratic		34	16	14	30	6
Minister Strahl says that the plebiscite gives the government 'moral cover' for its actions on the CWB		22	27	13	31	6
		28	19	15	34	4
– Minister Strahl says "the decision in favour of marketing choice is clear"		28	19	15	36	2
	0	20	40	60	80	100
Strongly agree Somewhat agree Some	what d	lisagree	Strong	ly disagree	e Di	K/ref



If the CWB single desk for barley is abolished and the CWB decides to market barley without the single desk along side private competitors, which of the following do you think is most likely to be true?



You will rarely if ever sell malt barley through the CWB
 Sell to both CWB and private companies
 Sell most if not all of your malt barley through the CWB
 DK/ref



Abolishment of Single Desk for Barley: In 5 Years

If the CWB single desk for barley is abolished and the CWB decides to market barley without the single desk along side private competitors, which of the following do you think is more likely?

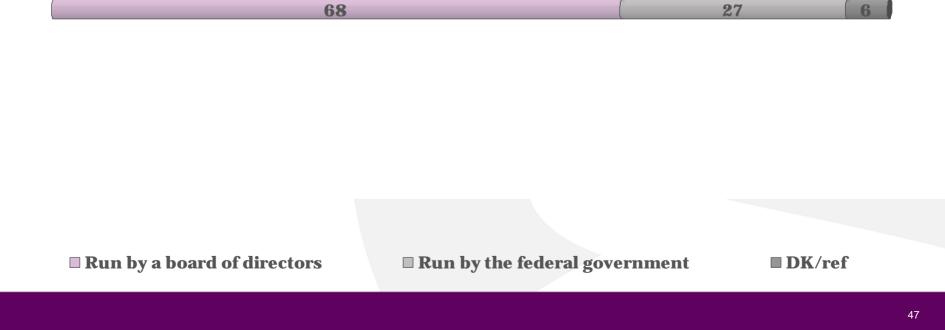
In 5 years the CWB will not be in the barley market
 In 5 years the CWB will dominate the barley market
 DK/ref

70





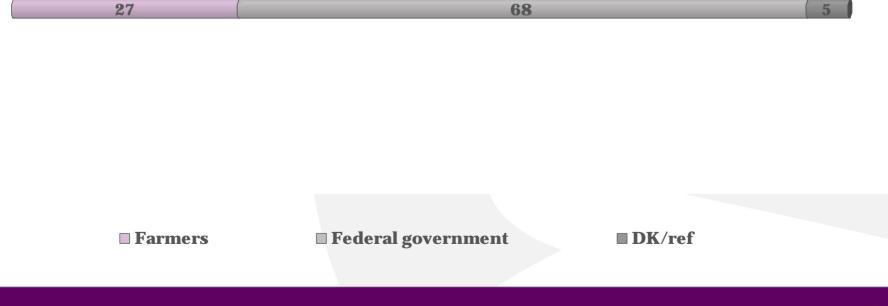
As far as you are concerned, how does the CWB operate now – is the Canadian Wheat Board run by a board of directors or run by the federal government?



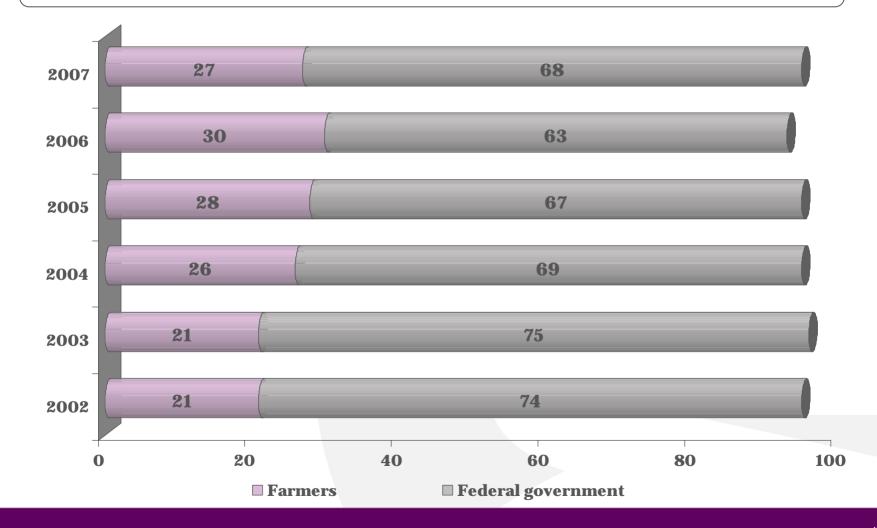


Major Decisions at CWB

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



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





Any decision to end the CWB single desk and implement a dual market should be made by farmers and not by the federal government 71 19 442 I would like to see the CWB speak up for farmers more often 56 27 8 8 When all is said and done, I have more confidence in the CWB to protect my interests more than a U.S. company 55 17 13 12 3 The current federal government is trying to assert control over the CWB 49 27 12 9 3 The fact that the government is still appoints people to the CWB Board of Directors tells me that the government is still trying to control the CWB 47 35 10 6 2 I am against anything that would weaken the CWB 42 17 19 21 2
When all is said and done, I have more confidence in the CWB to protect my interests more than a U.S. company The current federal government is trying to assert control over the CWB 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 Creating a so called dual market for wheat will eventually result in the end of the CWB
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Directors tells me that the government is still trying to control the CWB Creating a so called dual market for wheat will eventually result in the end of the CWB
end of the CWB
I am against anything that would weaken the CWB 42 17 19 21 2
The CWB provides me with a sense of security 40 26 15 18
I think scrapping the single desk for barley could really hurt the CWB 37 26 21 13 4 over time
Canadian farmers get better prices for grain because of the CWB 36 21 17 24 2
I think if the CWB had competition it would provide better service 33 25 13 27 2
I think if the CWB had competition I would get better prices for my grain 32 22 14 30 2
0 20 40 60 80 100
Strongly agree Somewhat agree Somewhat disagree Strongly disagree DK/ref



the gandalf group Agreement With Statements: Bottom Tier

Agree/Disa	agree:				
The Conservative government in Ottawa is better for farmers than the ones that went before it	29	23	16	25	6
The CWB is a farmer controlled organization because farmers elect the majority of directors	28	35		19 (16	2
I see opening up the barley market as a test run of whether we should do the same for wheat	28	32	12	26	2
	27	32	9	29	3
A dual market for wheat would be ideal, but is practically unworkable	25	19	23	27	5
Getting rid of the single desk for barley will result in better returns for barley producers	24	23	19	28	6
The new government should as it said in the election, end the CWB single desk, and implement a dual market for CWB grains	24	22 12	2	39	3
The federal government has made a commitment that its dual market policy will allow the CWB to be a strong and viable option for farmers into the future	15	32	17	32	4
I voted Conservative in the last federal election partly because I wanted the federal government to end the CWB single desk		£ (51	1	15
The recent federal assistance is going to help me a great deal	9 30	22		27	12
Grain companies such as Agricore or Cargill have my best interest at heart	6 18 (28		45	2
	0 20	40	60	80	100
Strongly agree Somewhat agree Somew	what disagree	Strongly	y disagre	e D K	/ref