



the gandalf group

CWB 2007 Producer's Survey Results

April, 2007



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



Farm To Make Profit

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



■ Make a profit

■ Lose money

■ DK/ref



Farm To Make Profit: Tracking

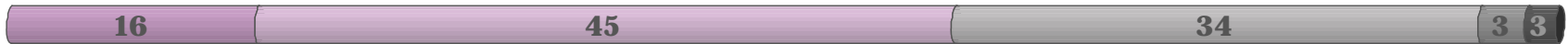
Do you expect your farm operation to make a profit this year or will lose money?





Your Farm's Situation

Among the following options, which best describes your situation?



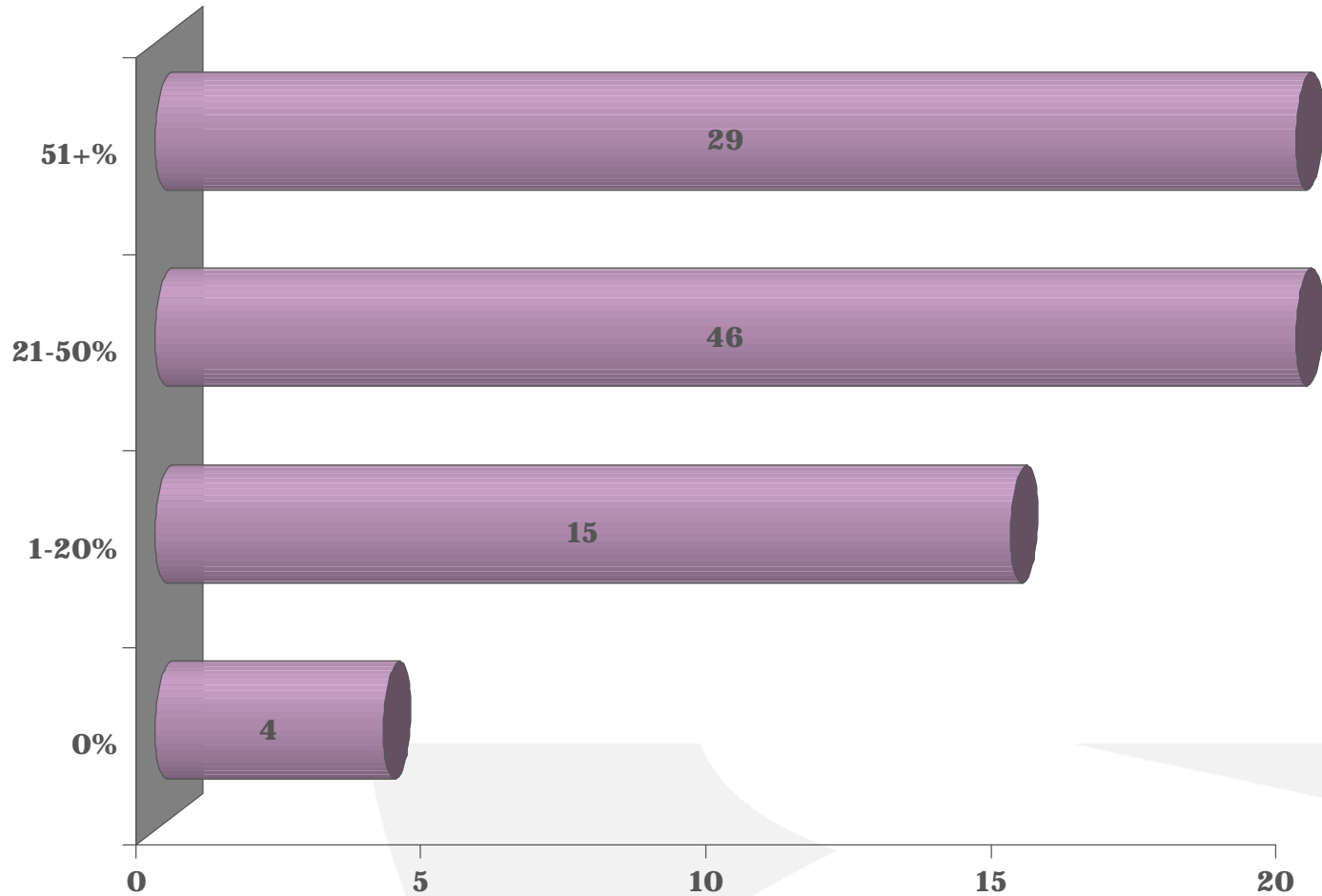
- Am doing just fine
- May be out of business in a few years
- DK/ref

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



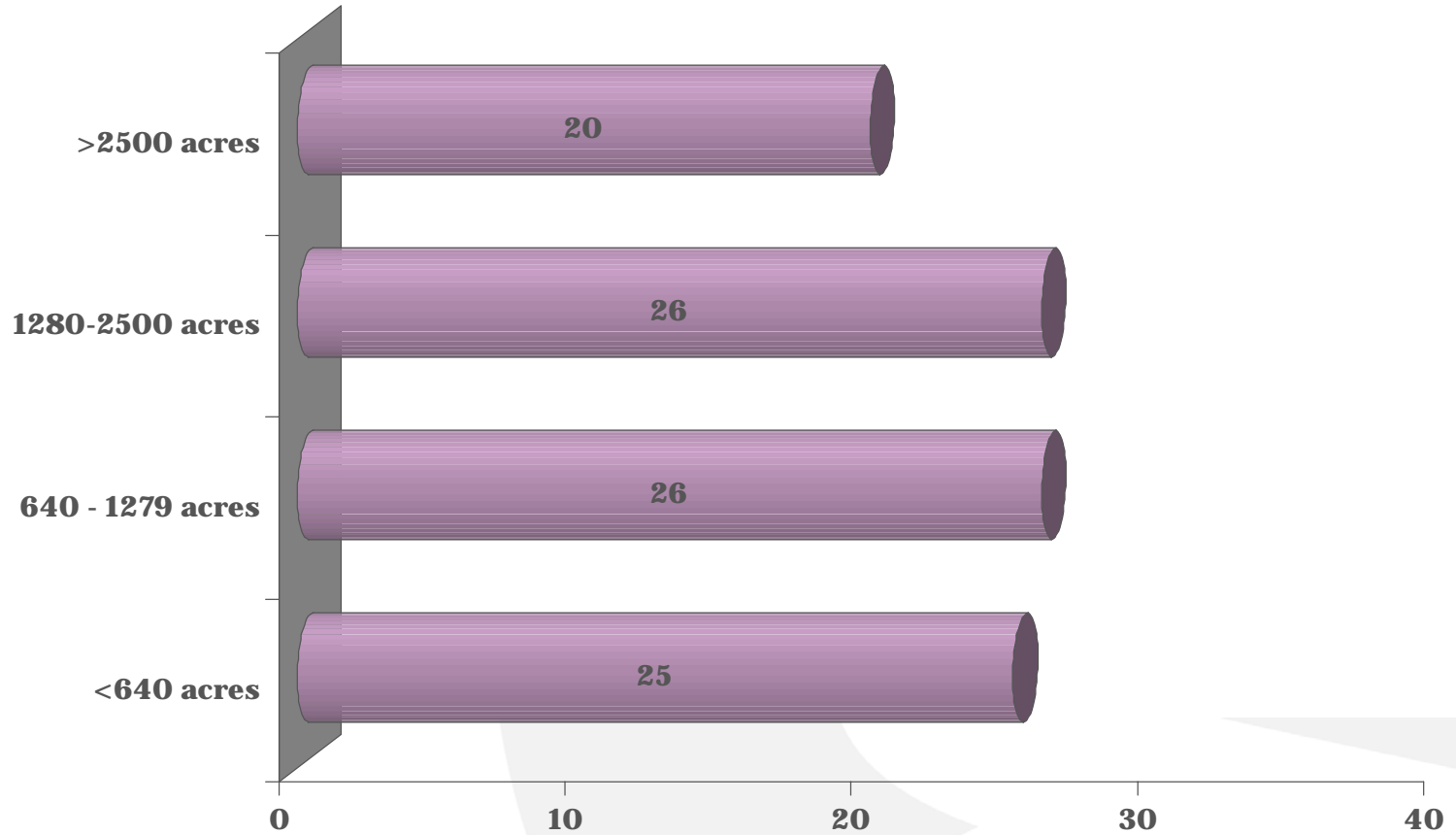
Percentage of Farm Receipts From CWB Grains

Percentage of your farm receipts come from CWB grains?





Size of Farm (in acres)





Outlook for Farming

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

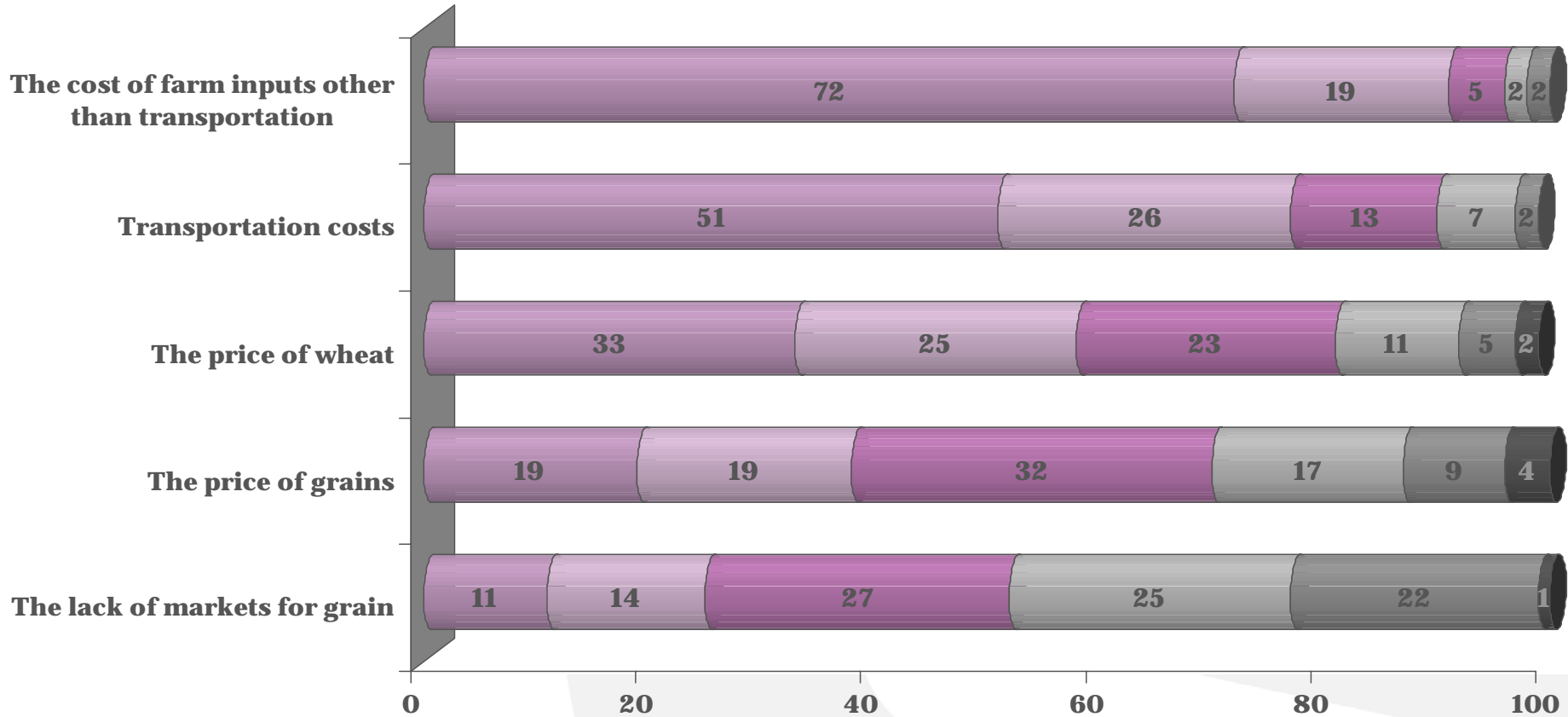


- Much more optimistic
- Somewhat more optimistic
- Stay the same
- Somewhat more pessimistic
- Much more pessimistic
- DK/ref



Problems In The Coming Year

How much of a problem will _____ be for your farm in the coming year?

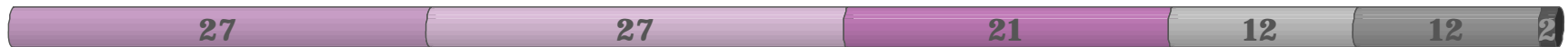


■ A big problem ■ Somewhat of a problem ■ Not an issue ■ Not really a problem ■ Not a problem at all ■ DK/ref



Rating of the CWB: Marketing of Wheat

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



■ Excellent

■ Good

■ Moderately good

■ 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?

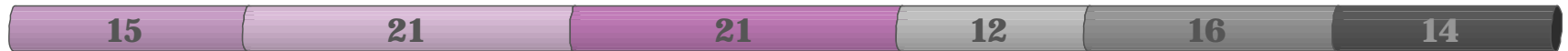


■ Excellent ■ Good ■ Moderately good ■ Poor ■ Very poor ■ DK/ref



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?



■ Excellent

■ Good

■ Moderately good

■ Poor

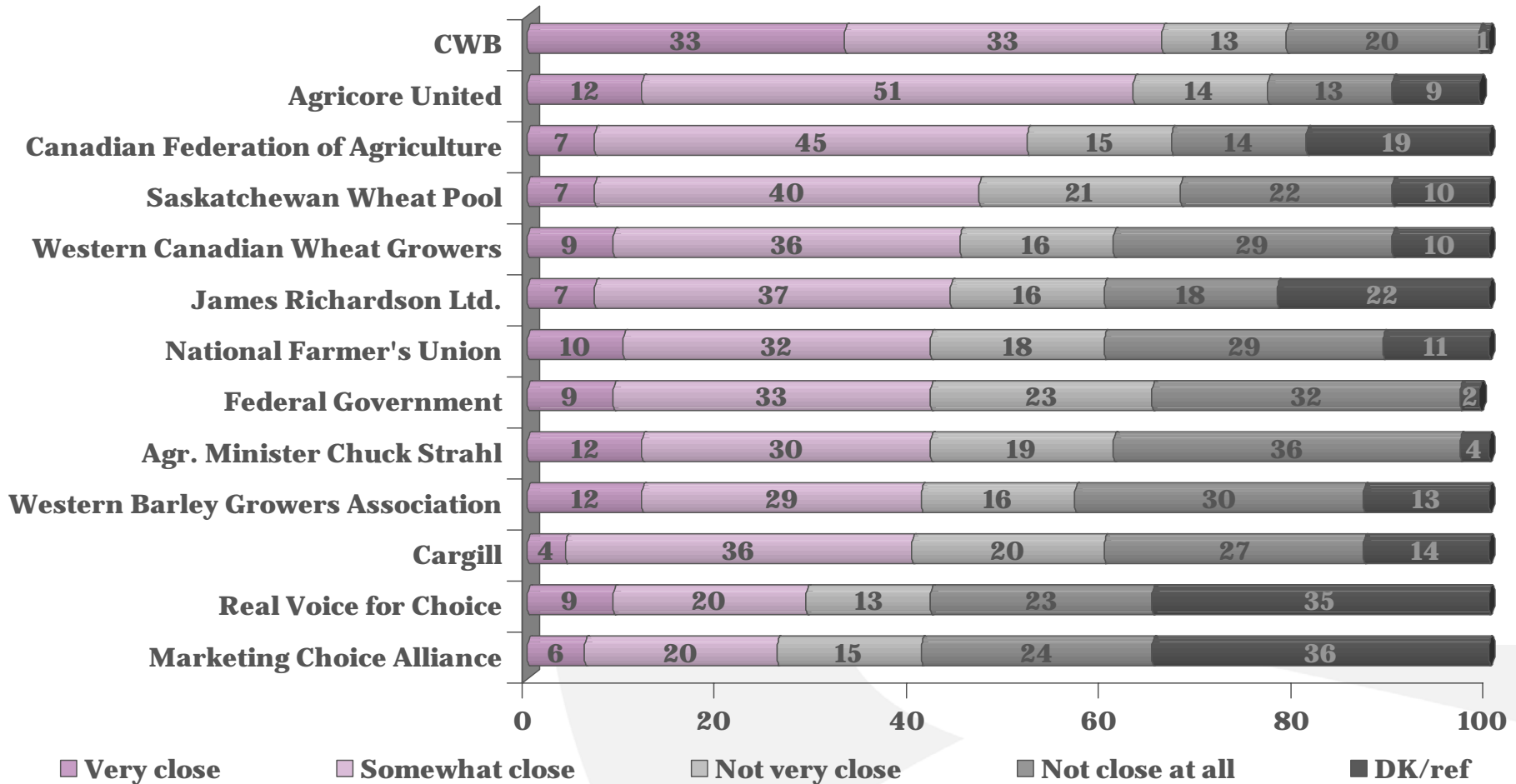
■ Very poor

■ DK/ref



Views Close to Your Own

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





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?



Very close

Somewhat close

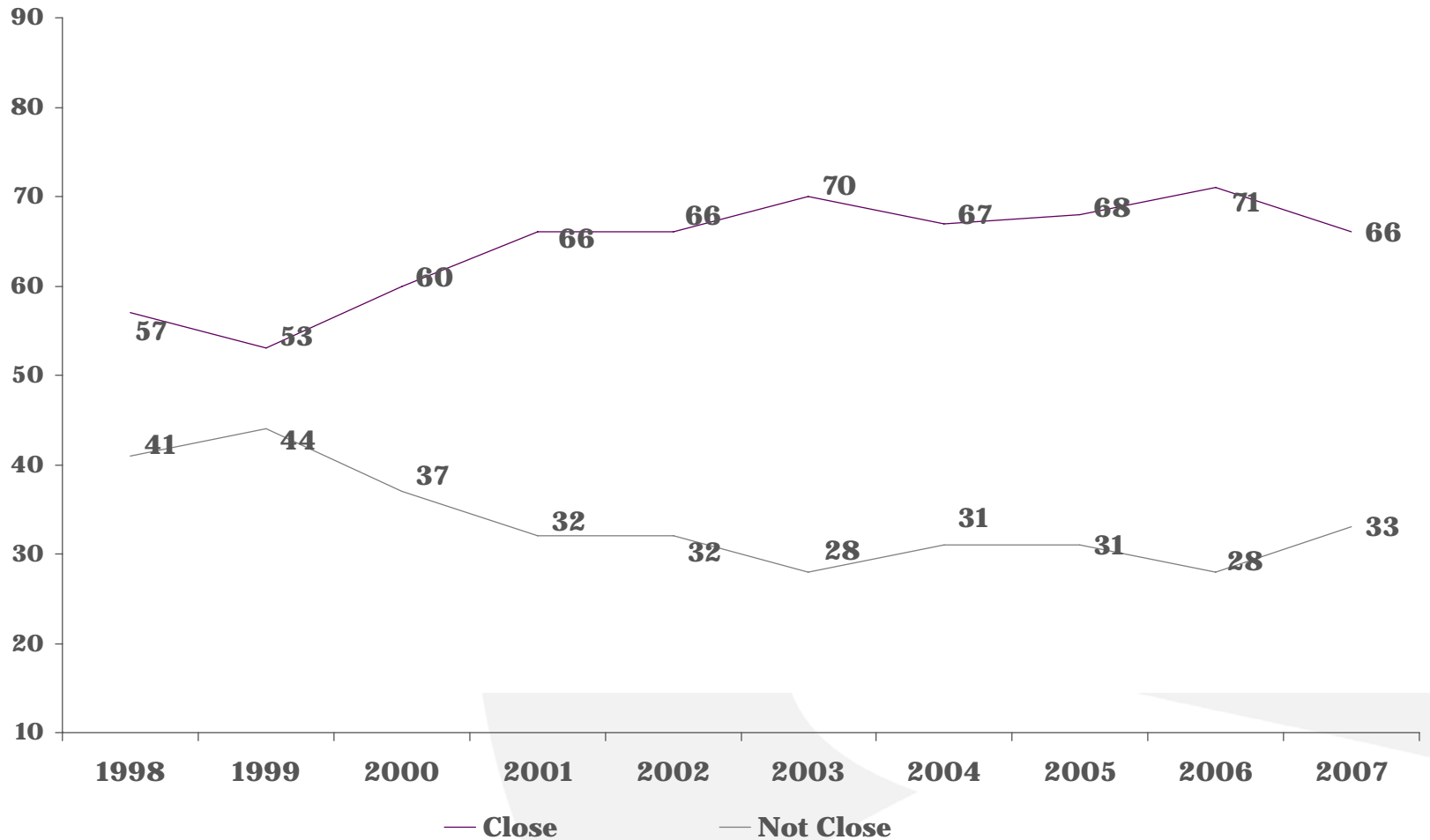
Not very close

Not close at all

DK/ref



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





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?



■ Very close

■ Somewhat close

■ Not very close

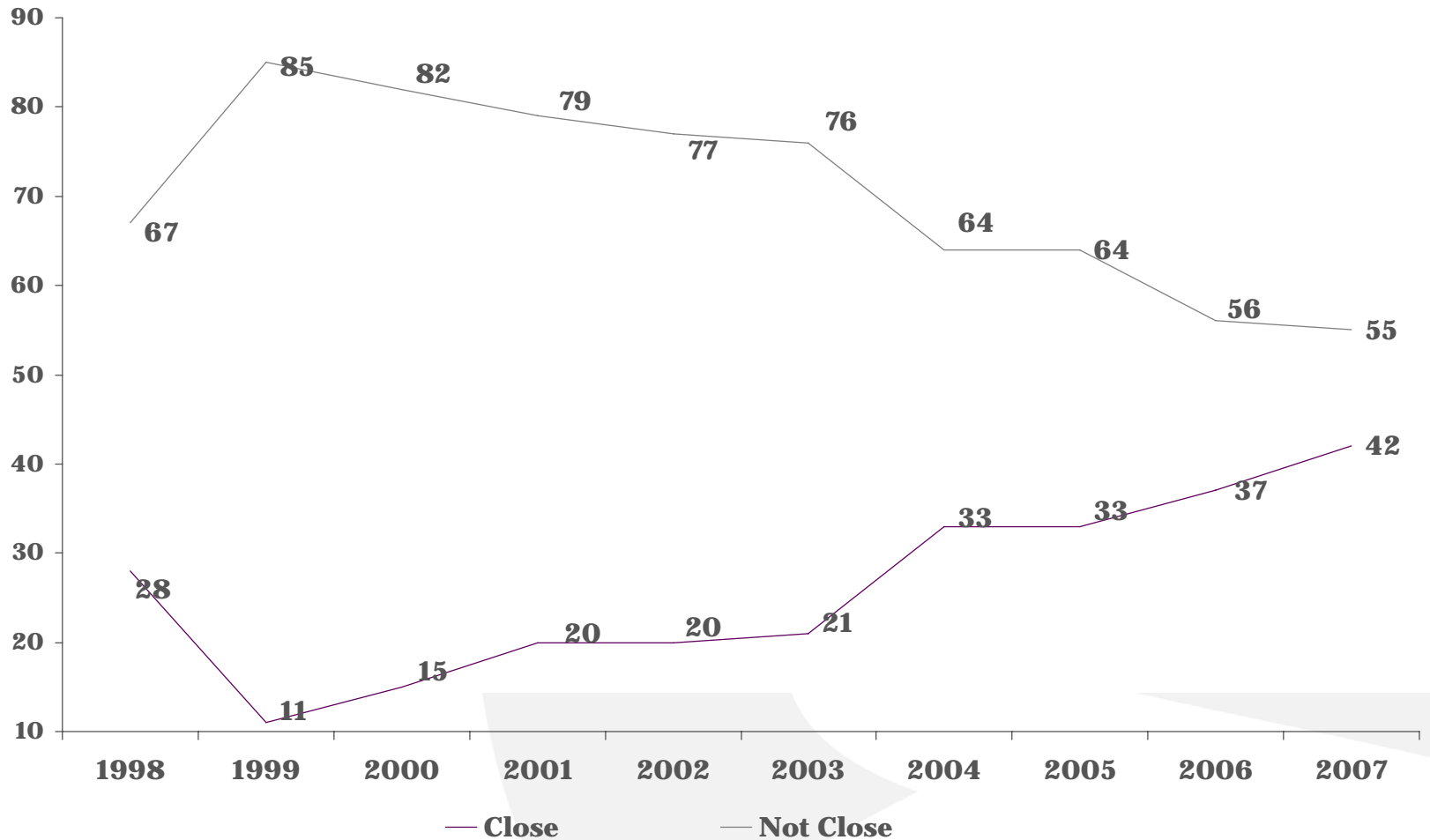
■ Not close at all

■ DK/ref



Views Close to Your Own: Federal Government – Tracking

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





Support or Oppose CWB

Do you support or oppose the Canadian Wheat Board?



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



Support or Oppose CWB: Tracking

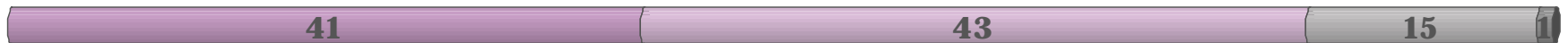
Do you support or oppose the Canadian Wheat Board?



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



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



■ More favourable

■ No change

■ 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?



■ Solely CWB

■ Dual marketing

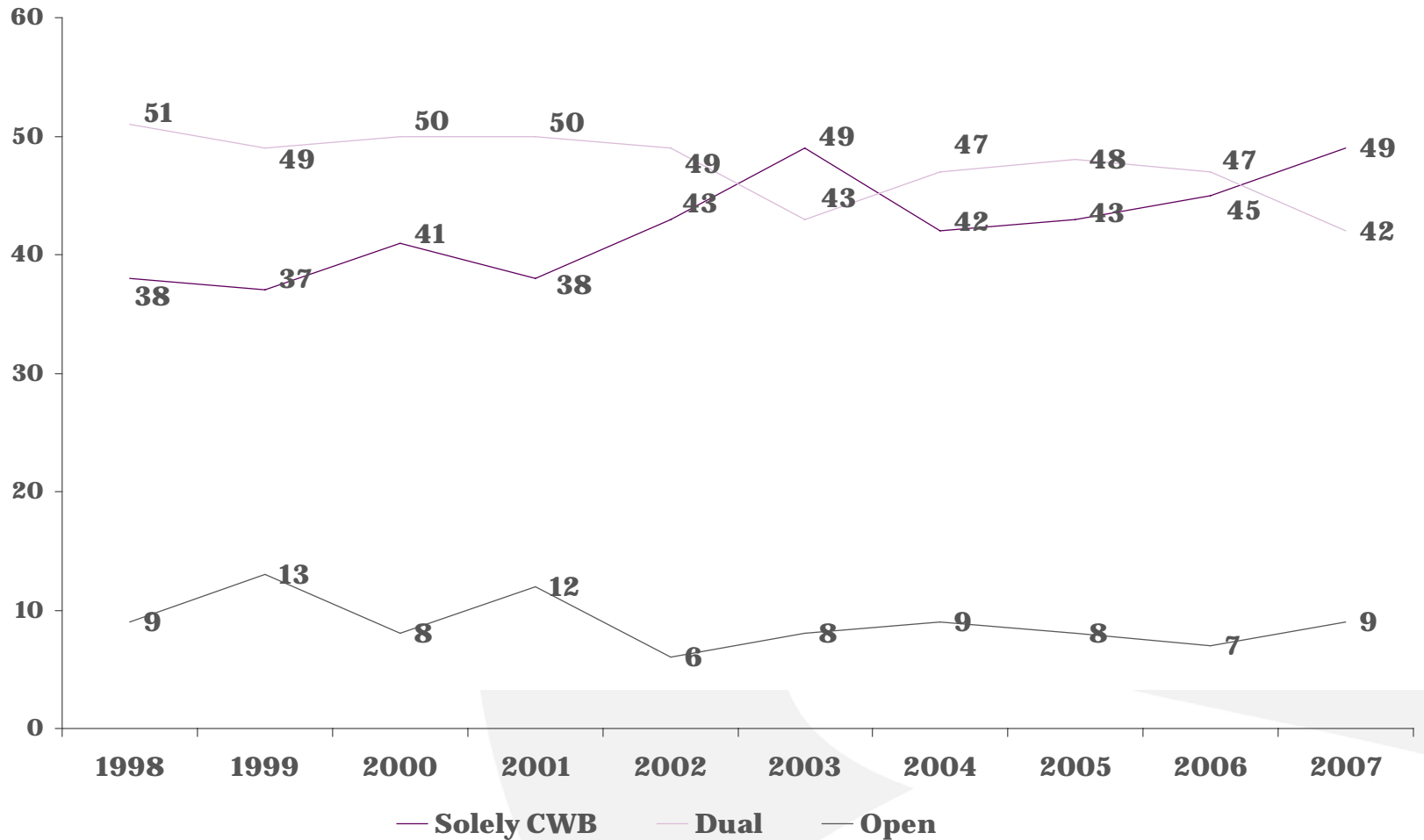
■ Open market

■ DK/ref



Approaches to Marketing Wheat – Tracking

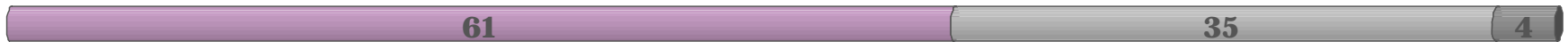
If you had to choose between three different approaches to marketing wheat, which of the following would you prefer?





Options For Wheat Marketing

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



■ Solely CWB

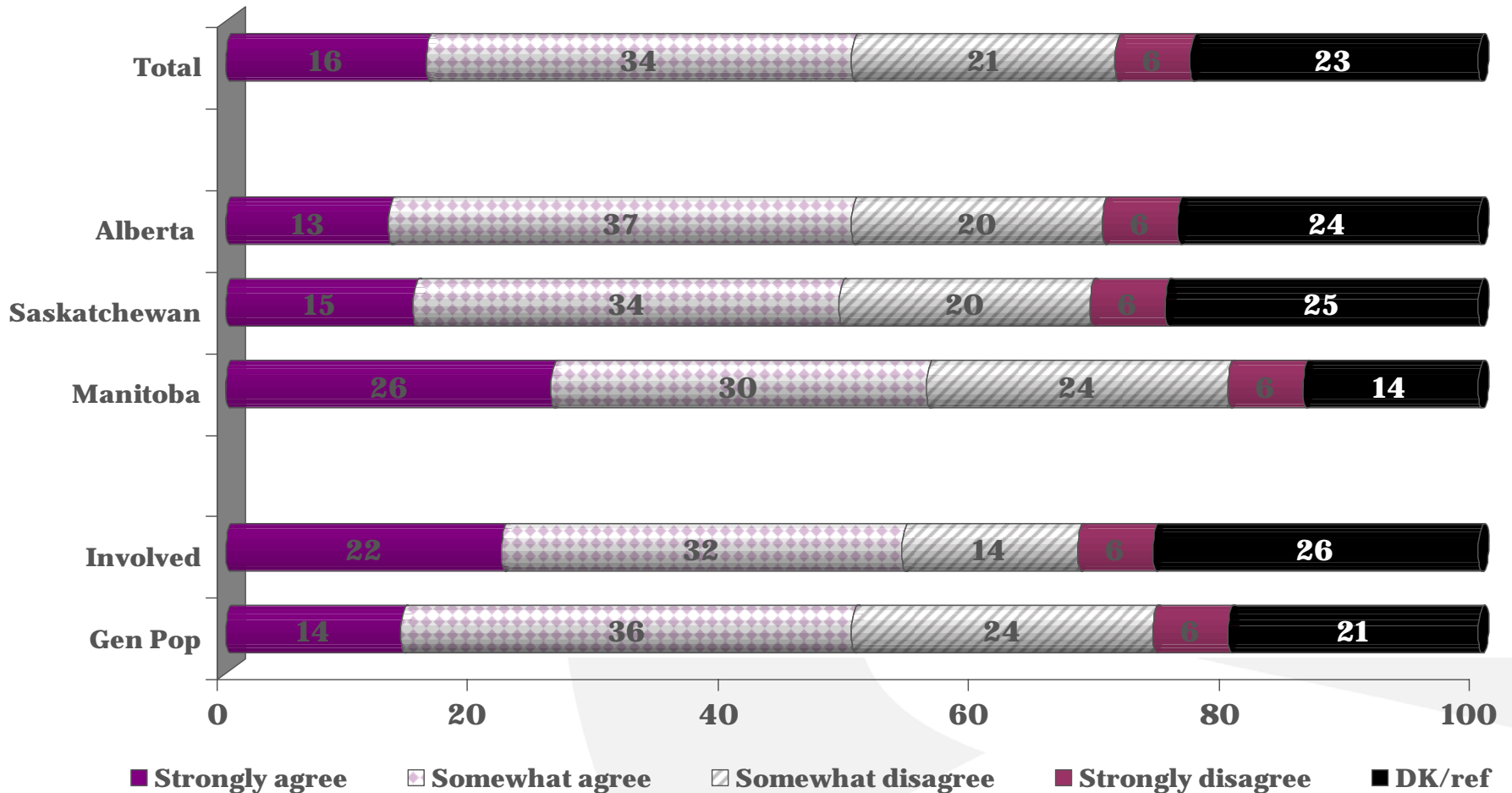
■ Open market

■ DK/ref



Agree/Disagree: Private Grain Marketers Get Better Price

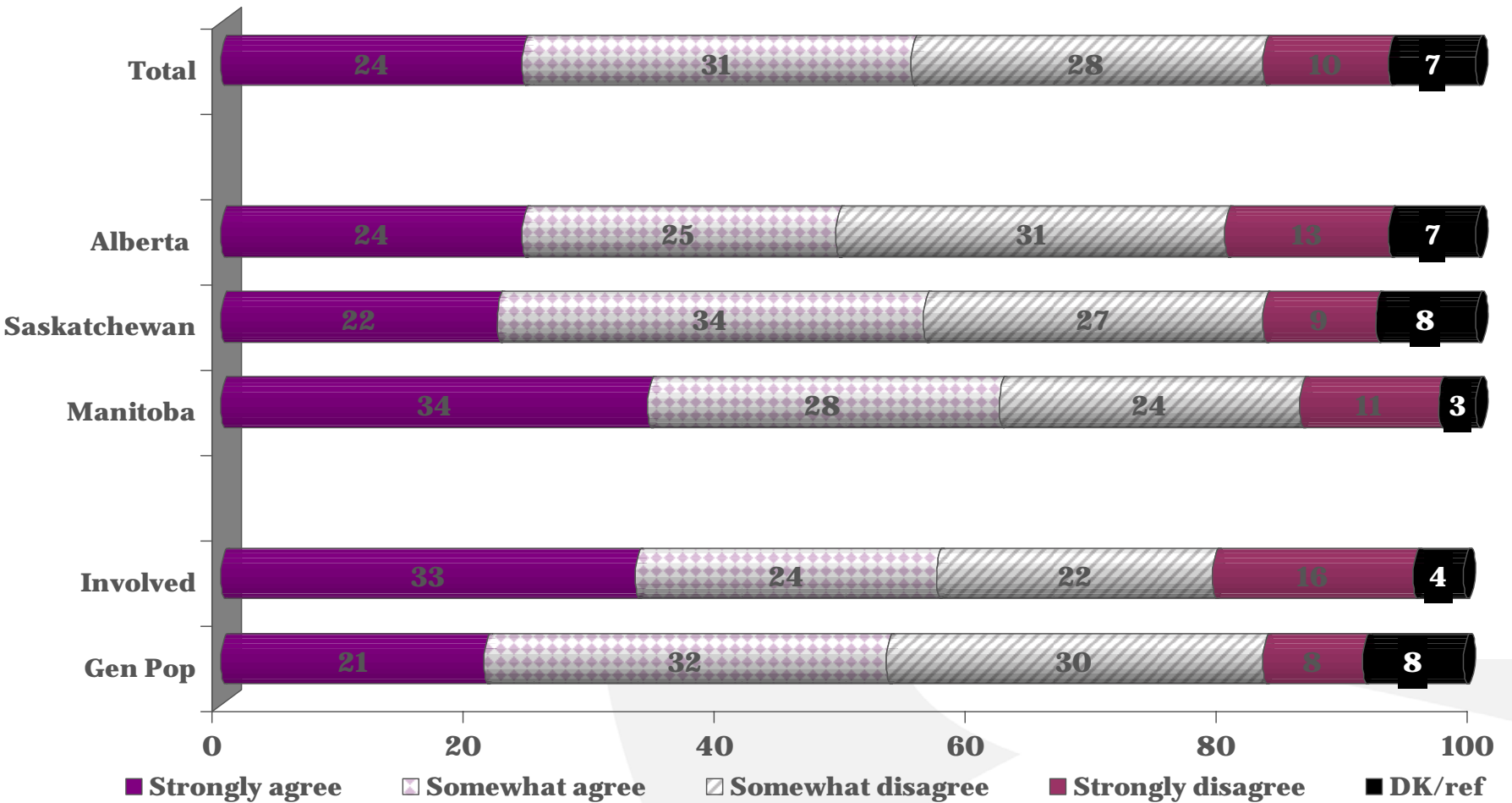
Agree/disagree: Private grain marketers – like Cargill, Saskatchewan Wheat Pool or Agricore – get better prices for wheat than the CWB does *



*asked only among dual market supporters (n=540)



Agree/disagree: You don't like taking a 'pooled' price for grain*

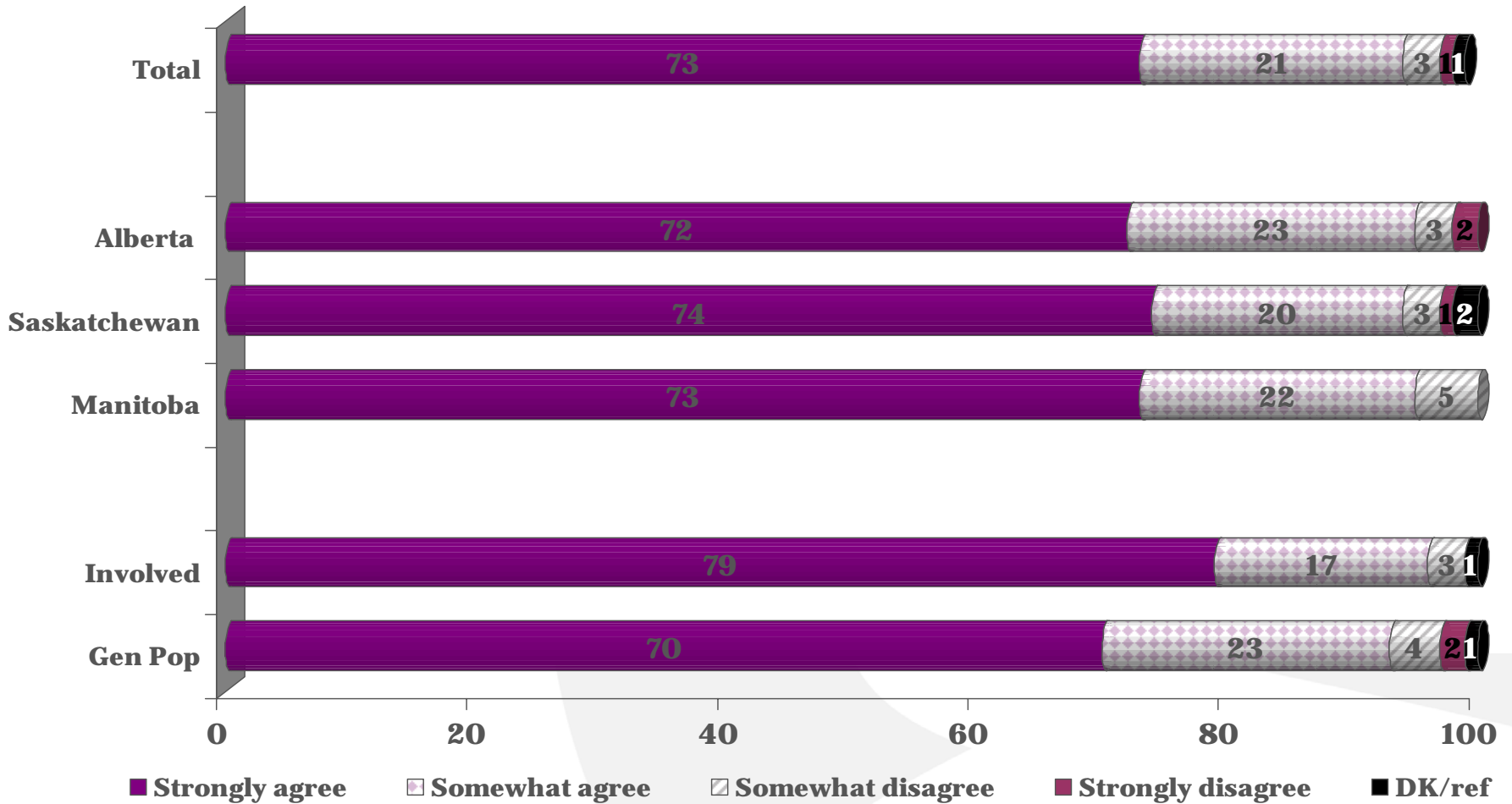


*asked only among dual market supporters (n=540)



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*

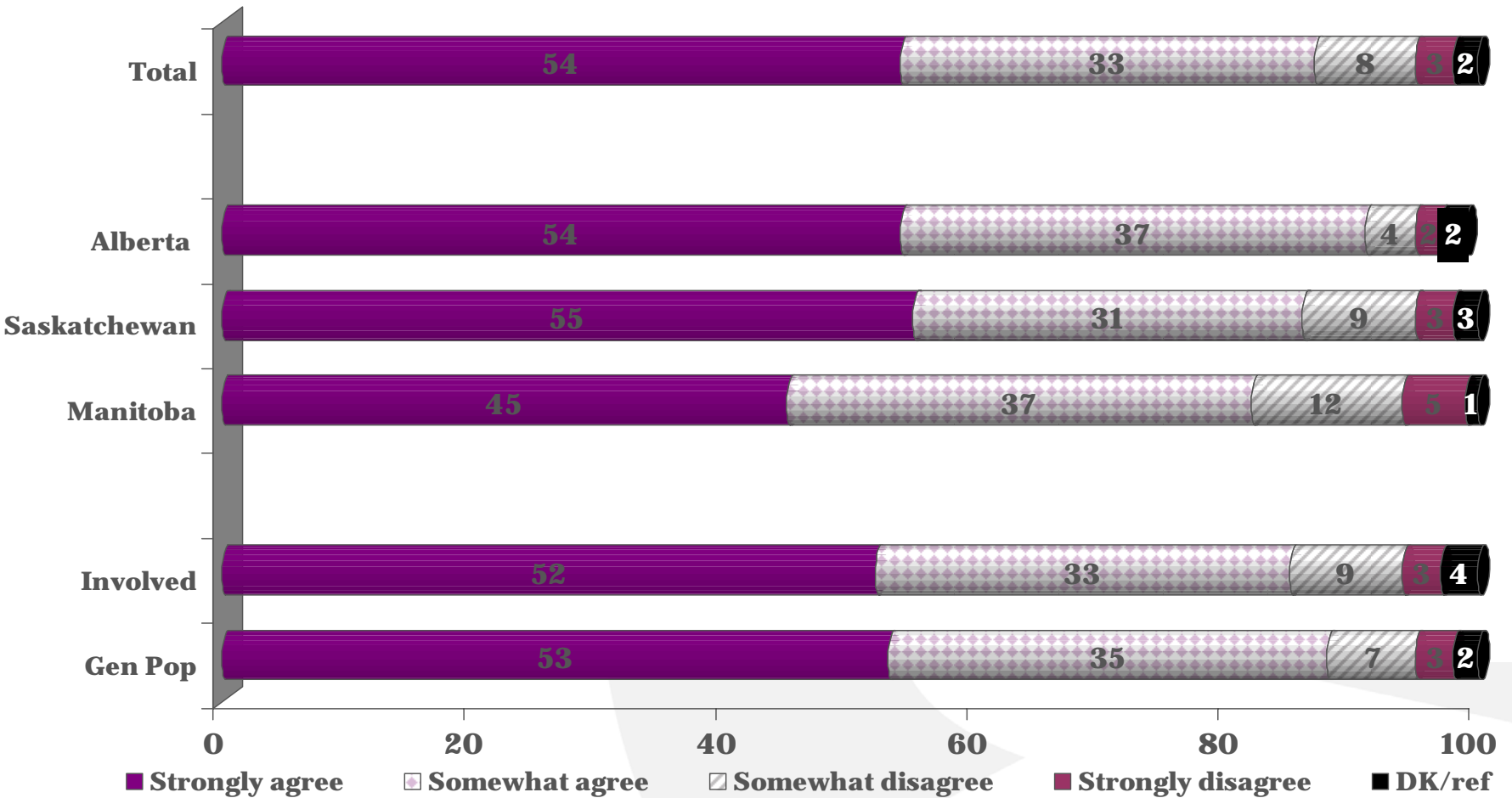


*asked only among dual market supporters (n=540)



Agree/Disagree: More Companies Will Increase Values

Agree/disagree: Having more companies to sell your wheat to will increase the values you receive*



*asked only among dual market supporters (n=540)



Options For Barley Marketing

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



■ Solely CWB

■ Dual marketing

■ Open market

■ DK/ref



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*



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ DK/ref

*asked only among barley dual market supporters (n=543)



Options For Barley Marketing

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



■ Solely CWB

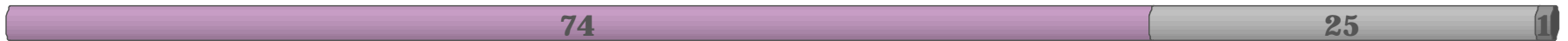
■ Open market

■ DK/ref



Eligible to Vote in Plebiscite

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

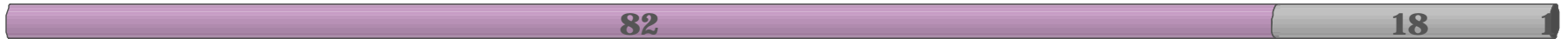


■ Yes ■ No ■ DK/ref



Did You Vote in Plebiscite

Did you vote in the plebiscite?



■ Yes

■ No

■ DK/ref



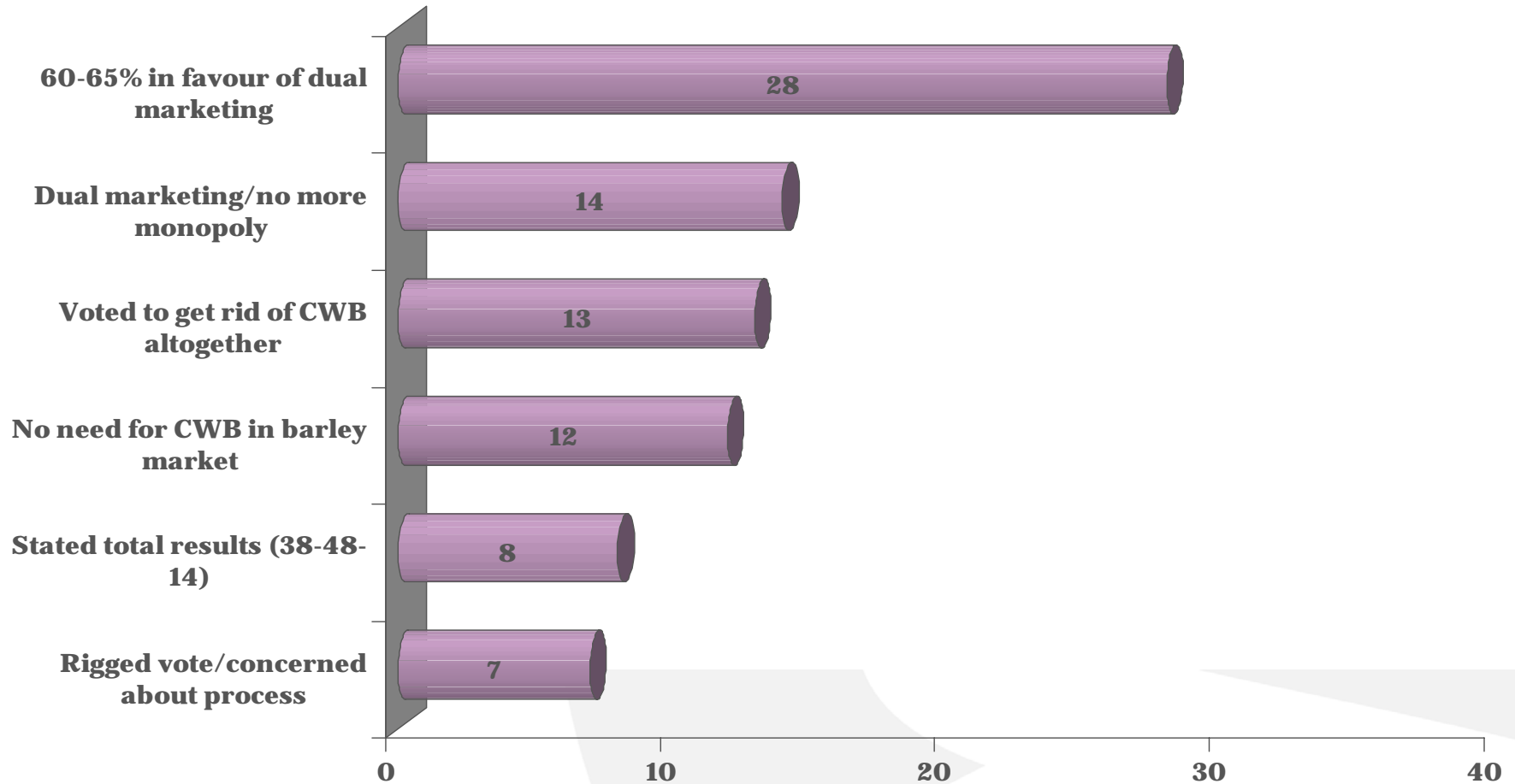
How familiar are you with the results of the plebiscite?



■ **Very familiar** ■ **Somewhat familiar** ■ **Not very familiar** ■ **Not at all familiar** ■ **DK/ref**



What were the results of the Plebiscite?





Paid Attention to Plebiscite

How much attention did you pay to the plebiscite campaign?



■ A great deal

■ A fair bit

■ Some

■ None at all



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.



■ Clear mandate ■ Vote in doubt ■ DK/ref



Views on the Plebiscite's Effect on the CWB

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.



■ Make sure CWB remains strong

■ Open barley market regardless of CWB

■ 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.



■ 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.



■ Would show how CWB would do

■ Won't be able to tell how CWB would do

■ DK/ref



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.



■ Works for barley, will work for wheat ■ Works for barley, would never work for wheat ■ DK/ref



Views on the Impacts of Ending Single Desk

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



■ Will know right away the effects

■ Will not know effects for several years

■ DK/ref



Views on How the Plebiscite Has Been Run

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



Well run

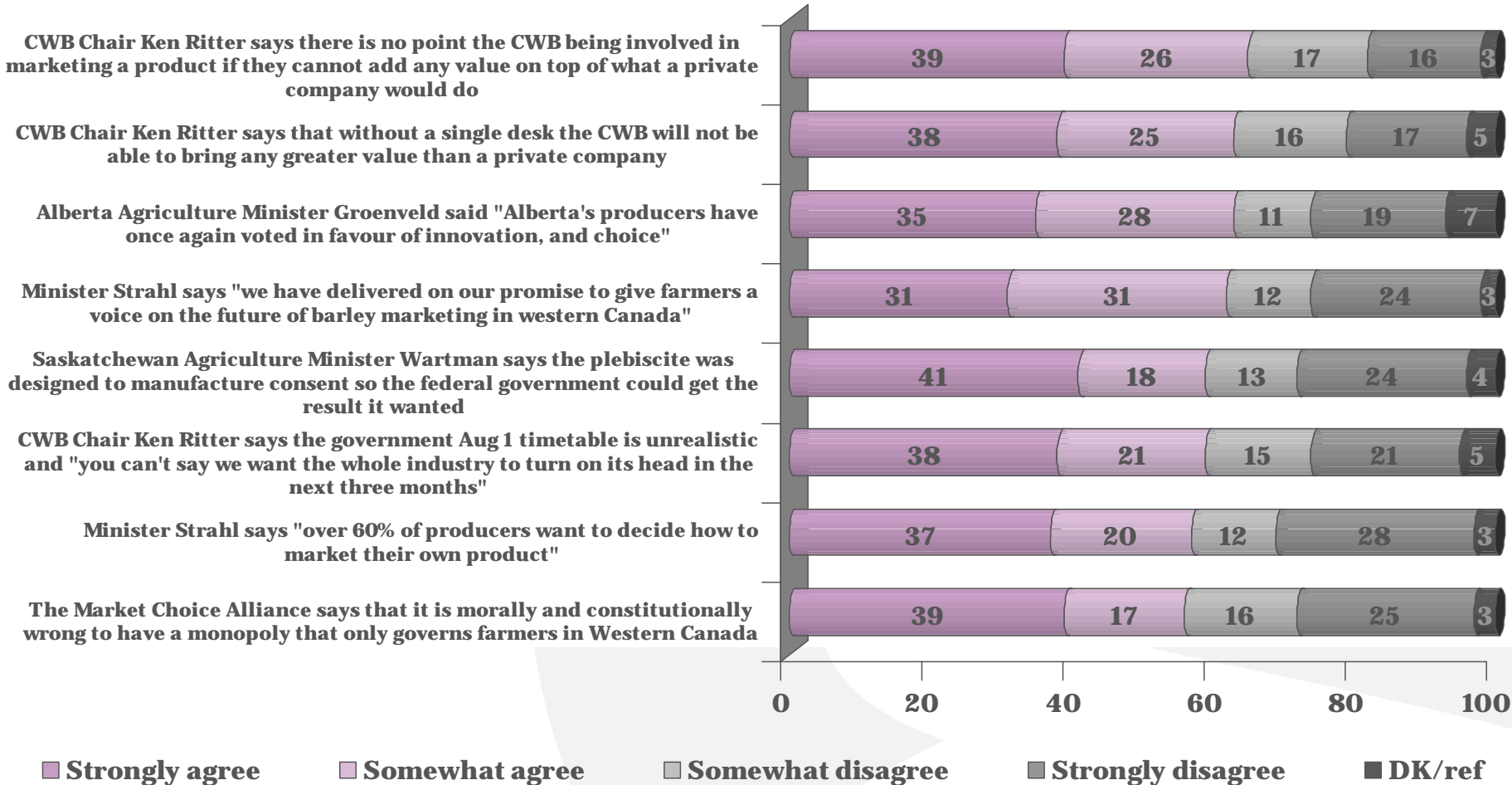
Poorly run

DK/ref



Agreement With Statements: Top Tier

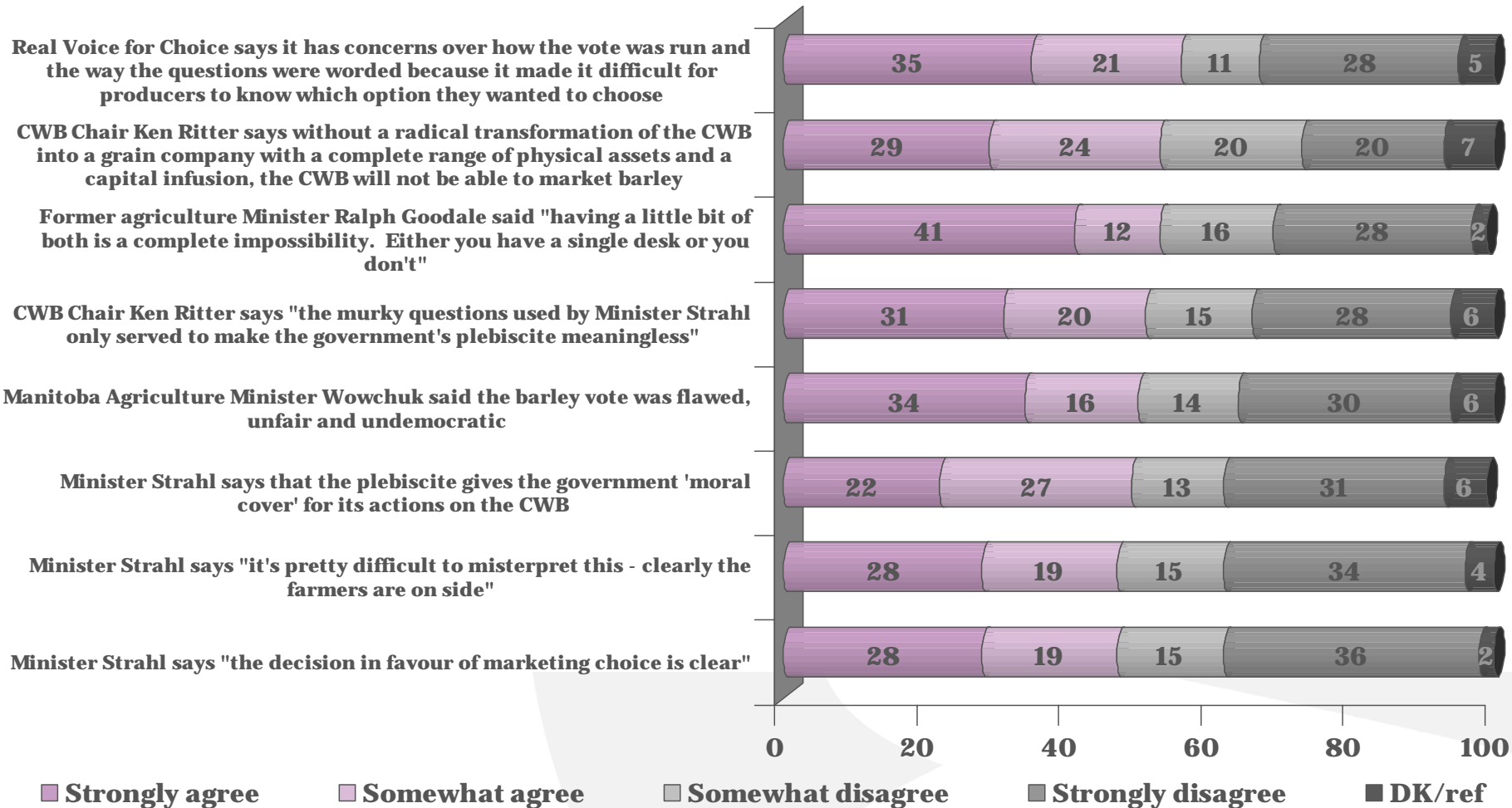
Agree/Disagree:





Agreement With Statements: Bottom Tier

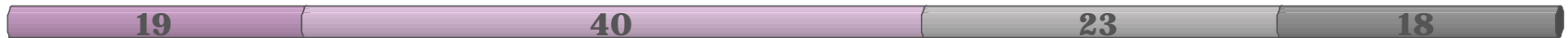
Agree/Disagree:





Abolishment of Single Desk for Barley

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

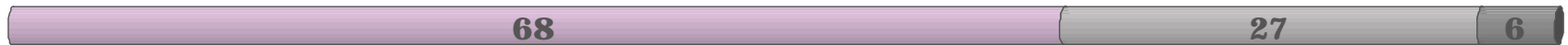
If the CWB single desk for barley is abolished and the CWB decides to market barley without the single desk along side private competitors, which of the following do you think is more likely?



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



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?



■ Run by a board of directors

■ Run by the federal government

■ DK/ref



Major Decisions at CWB

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



■ **Farmers**

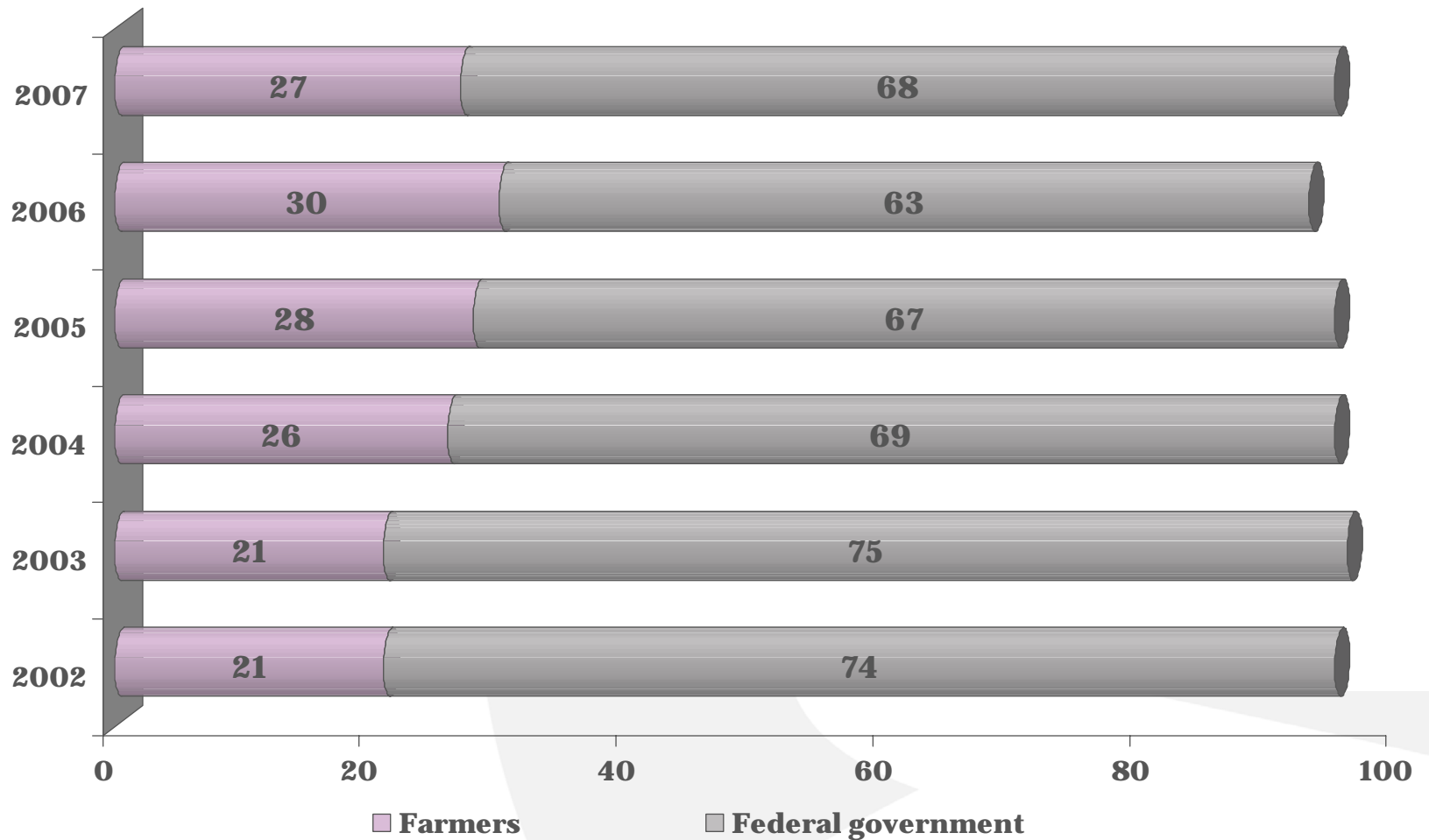
■ **Federal government**

■ **DK/ref**



Major Decisions at CWB: Tracking

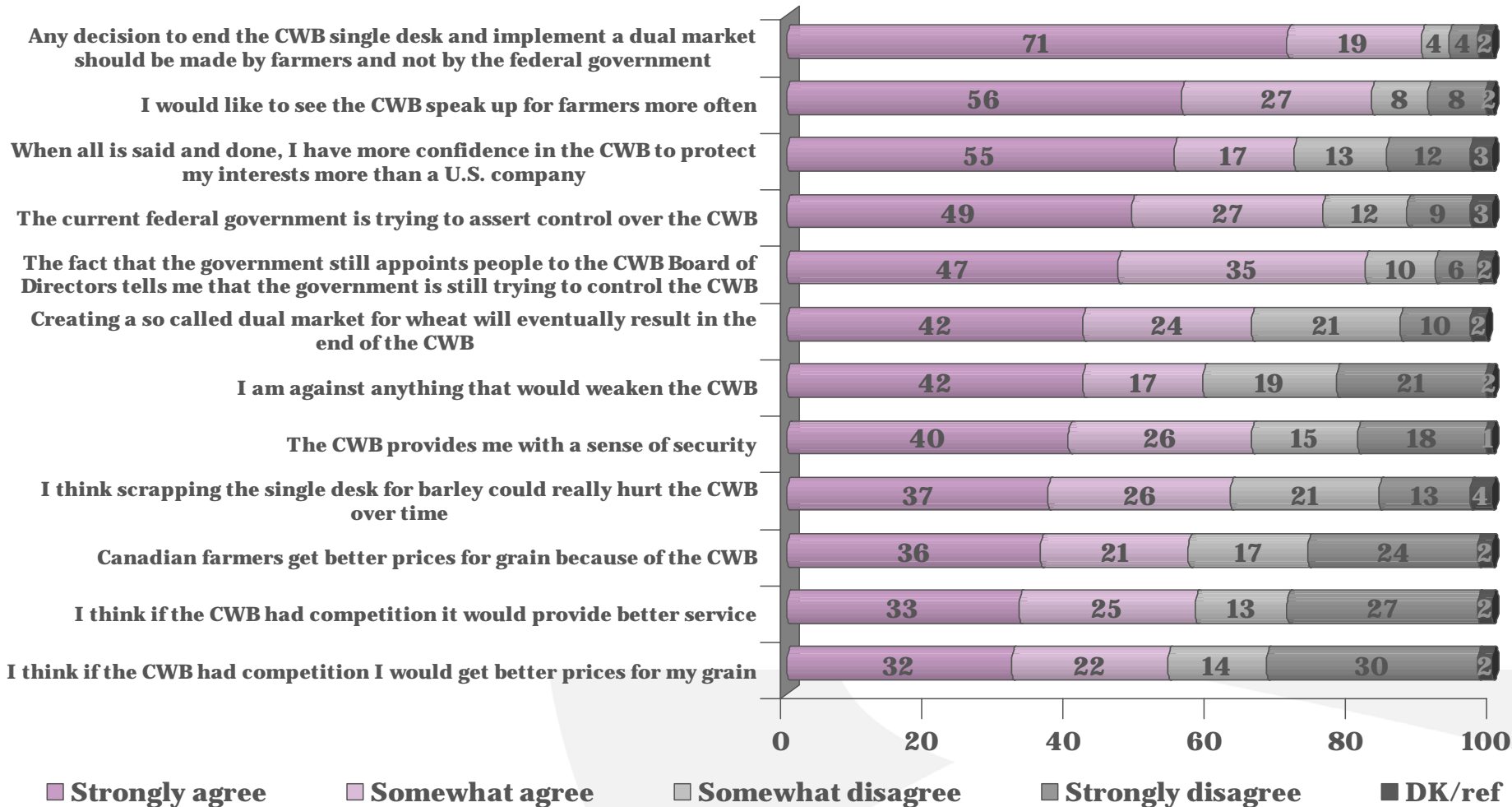
Who has more say over major decisions at the CWB – farmers or the federal government?





Agreement With Statements: Top Tier

Agree/Disagree:





Agreement With Statements: Bottom Tier

Agree/Disagree:

