



the gandalf group

# CWB Spring 2011 Producer's Survey Results – Final

June 29, 2011



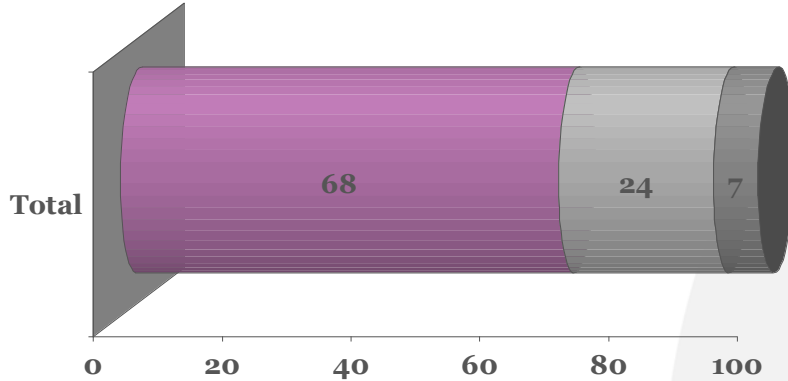
- The following is the final report of the Spring 2011 Producers' survey conducted for the Canadian Wheat Board. The Gandalf Group surveyed 900 grain producers in Alberta, Saskatchewan and Manitoba on their attitudes towards the Canadian Wheat Board and on Canadian Wheat Board issues. This is the first of two surveys for 2011; the next iteration will be fielded in the fall.
  - The survey was fielded by eNRG Research between April 1<sup>st</sup> and April 15<sup>th</sup>, 2011.
  - The margin of error was +/- 3.24%, 19/20.



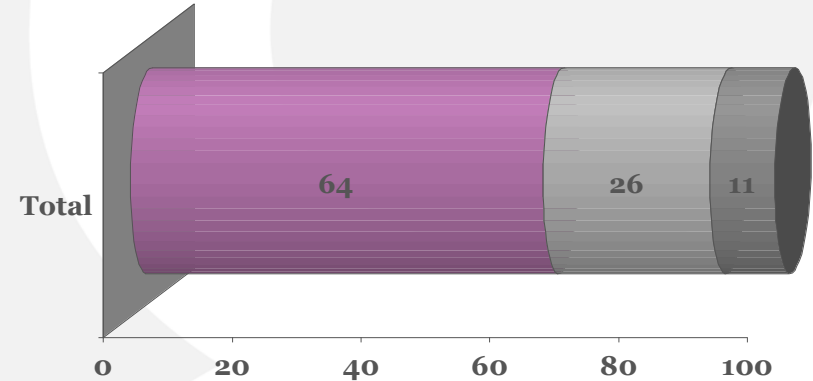
# Direction of Agriculture

“Do you feel things in agriculture in <your province> are generally going in the right direction or off on the wrong track?”

Spring 2011



Winter 2010



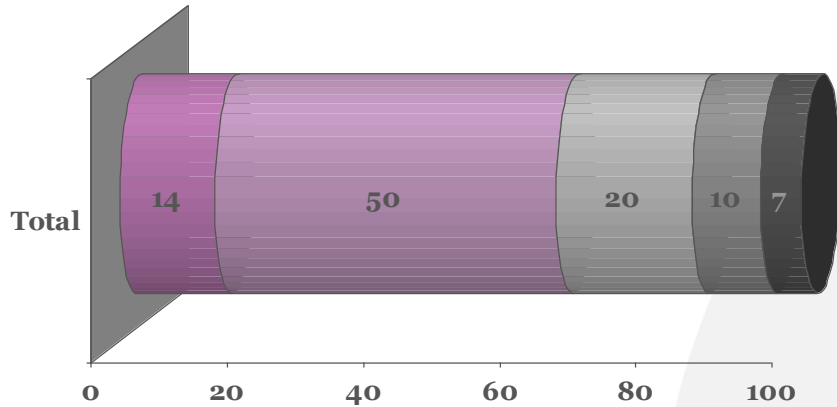
■ Right direction ■ Wrong track ■ DK/ref

■ Right direction ■ Wrong track ■ DK/ref



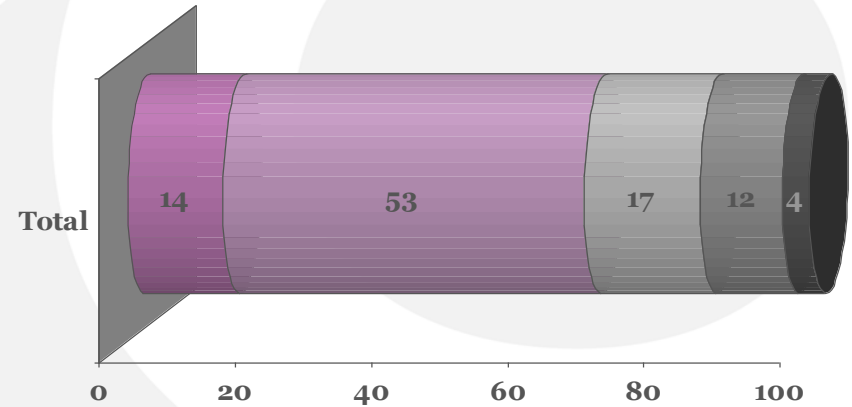
“In your opinion, is the outlook for farming this year \_\_\_\_ than last year?”

Spring 2011



- Much more optimistic
- Somewhat more optimistic
- Much more pessimistic
- DK/Ref

Winter 2010

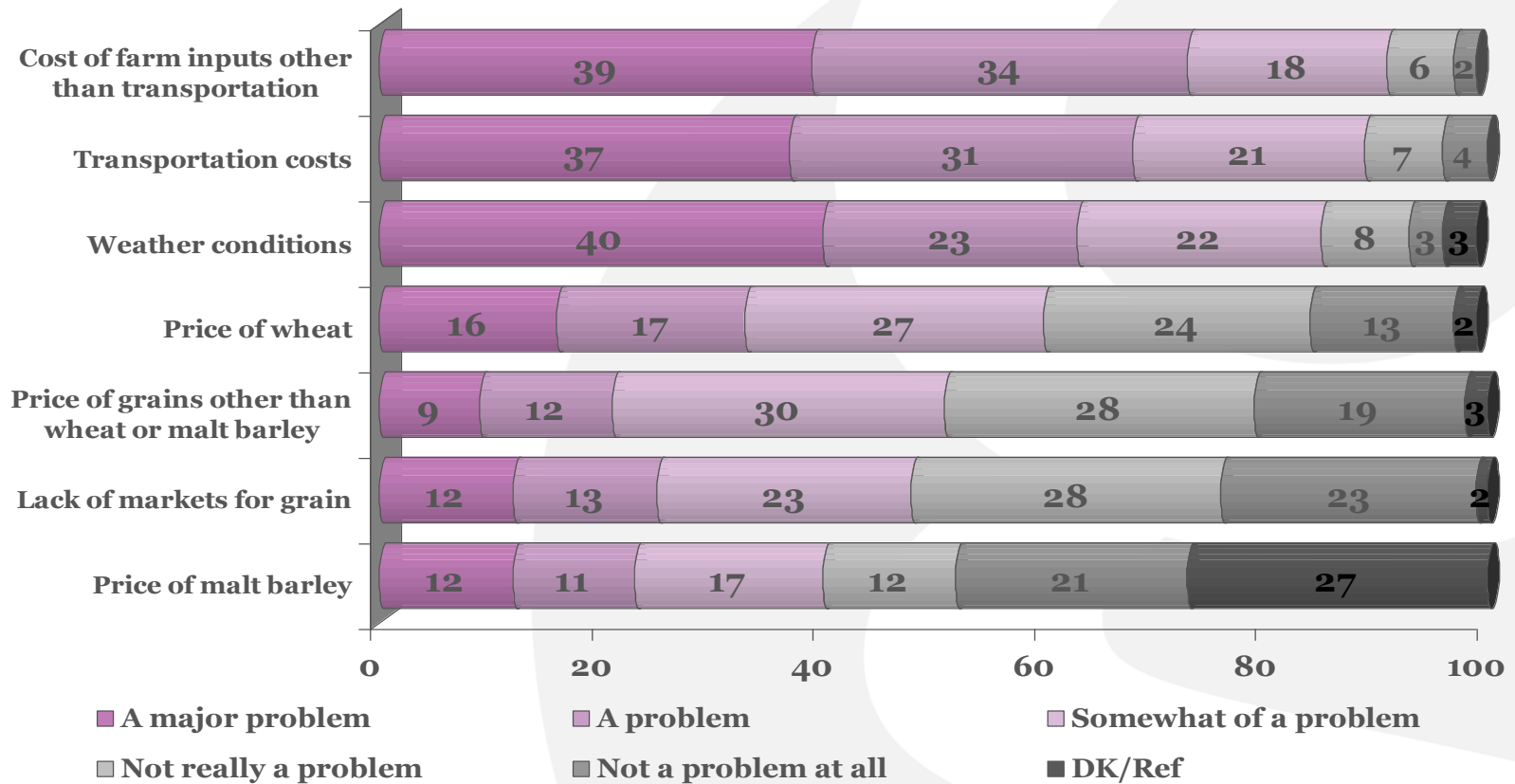


- Much more optimistic
- Somewhat more optimistic
- Much more pessimistic
- DK/Ref



# Problems in the Coming Year

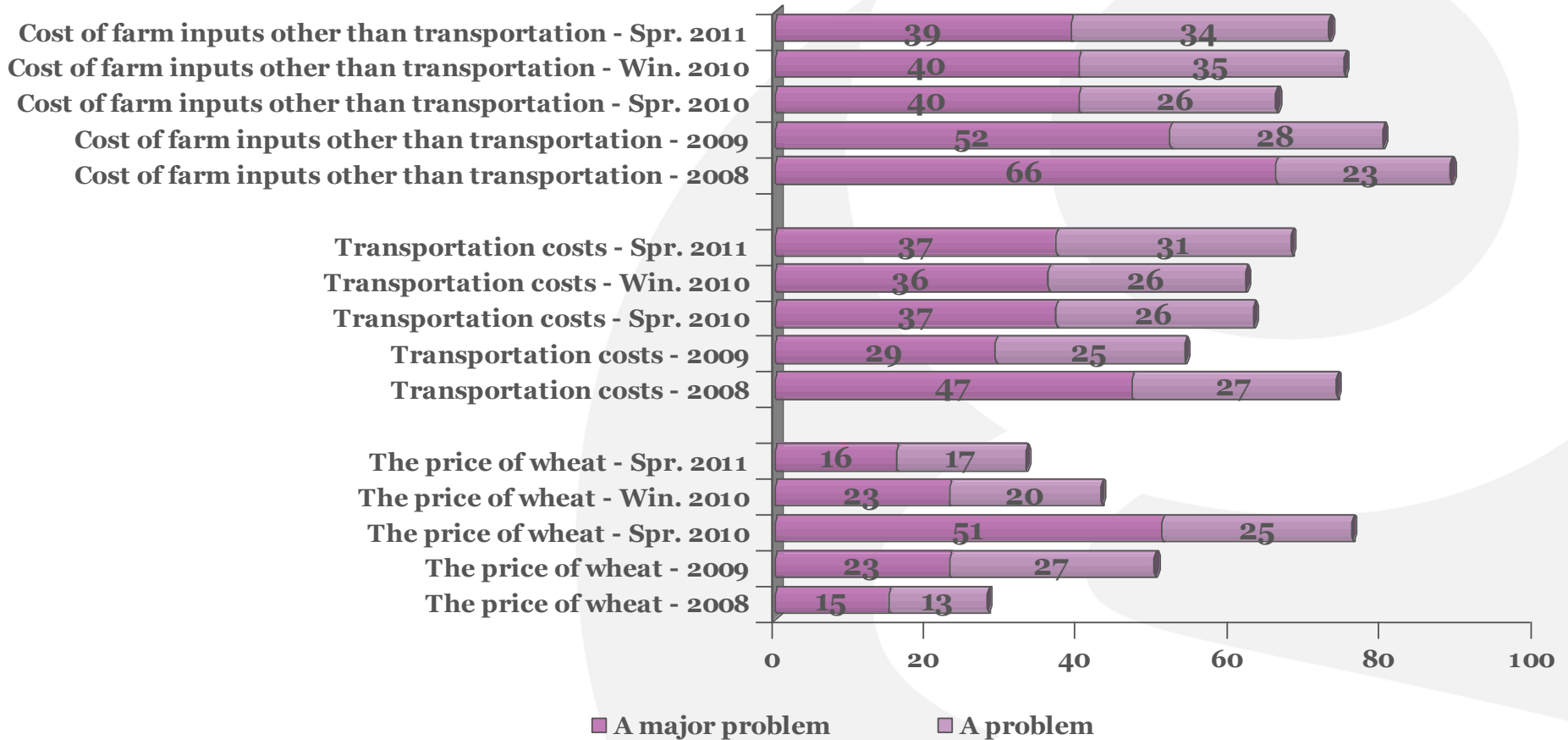
“On a scale of one to five, where one means not a problem at all and five means a big problem, how much of a problem will each of the following be for your farm in the coming year?”





# Problems In The Coming Year: Tracking

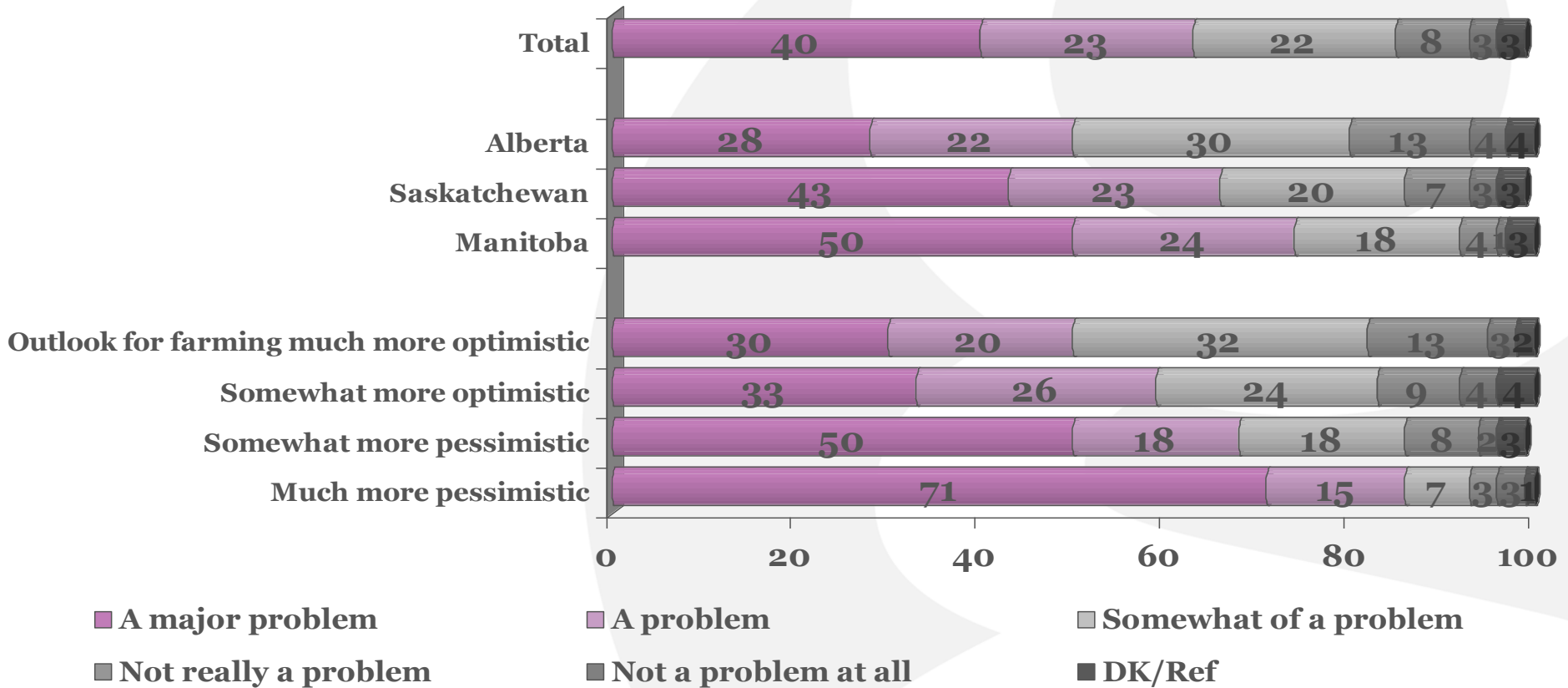
“On a scale of one to five, where one means not a problem at all and five means a big problem, how much of a problem will each of the following be for your farm in the coming year?”





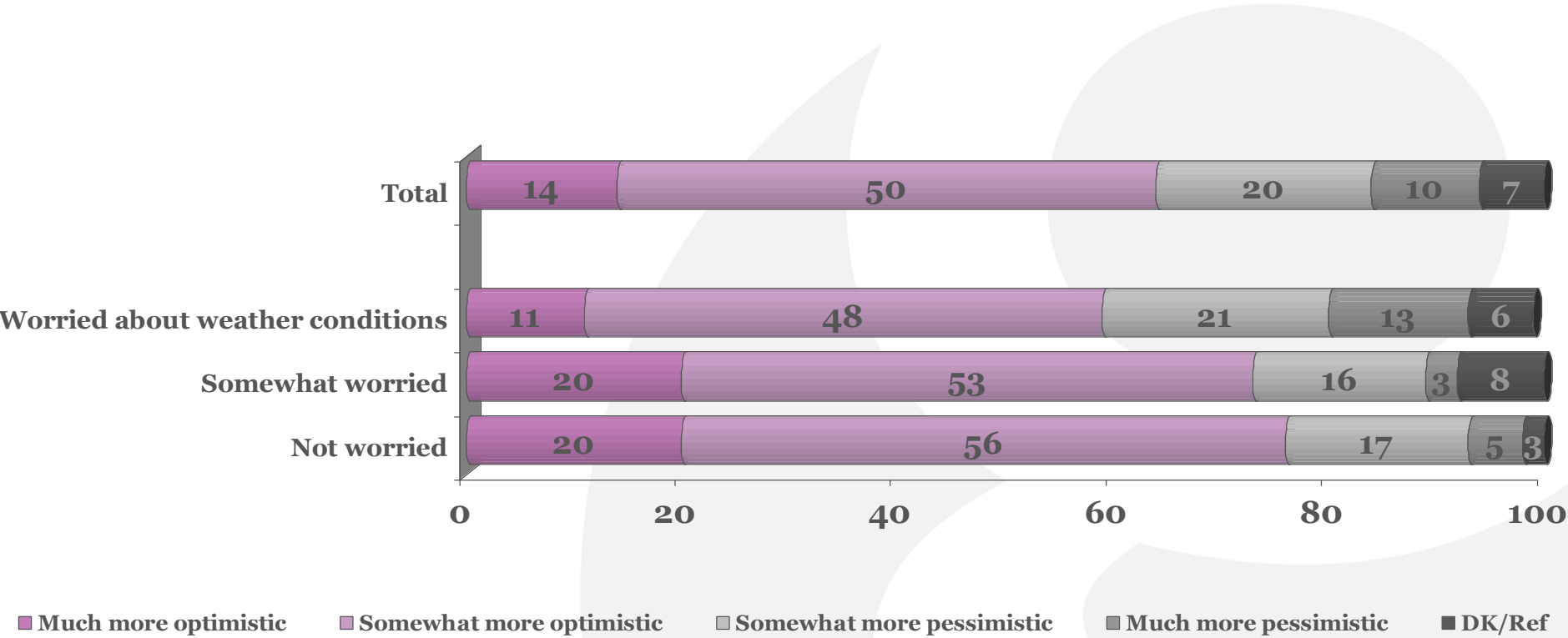
# The Problem of Weather Conditions

“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? Weather conditions”





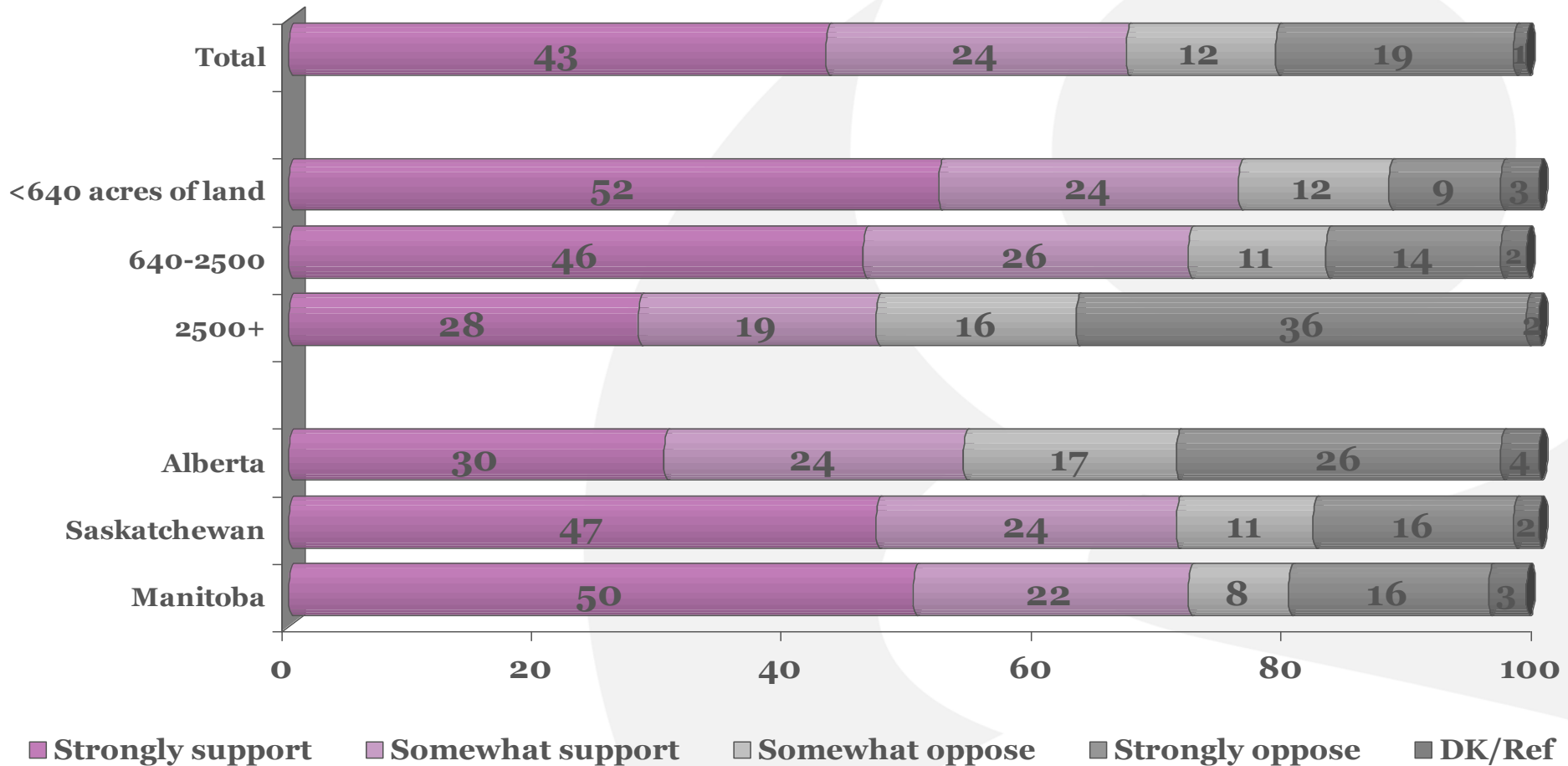
“In your opinion, is the outlook for farming this year \_\_\_\_ than last year?”





# Support for Canadian Wheat Board

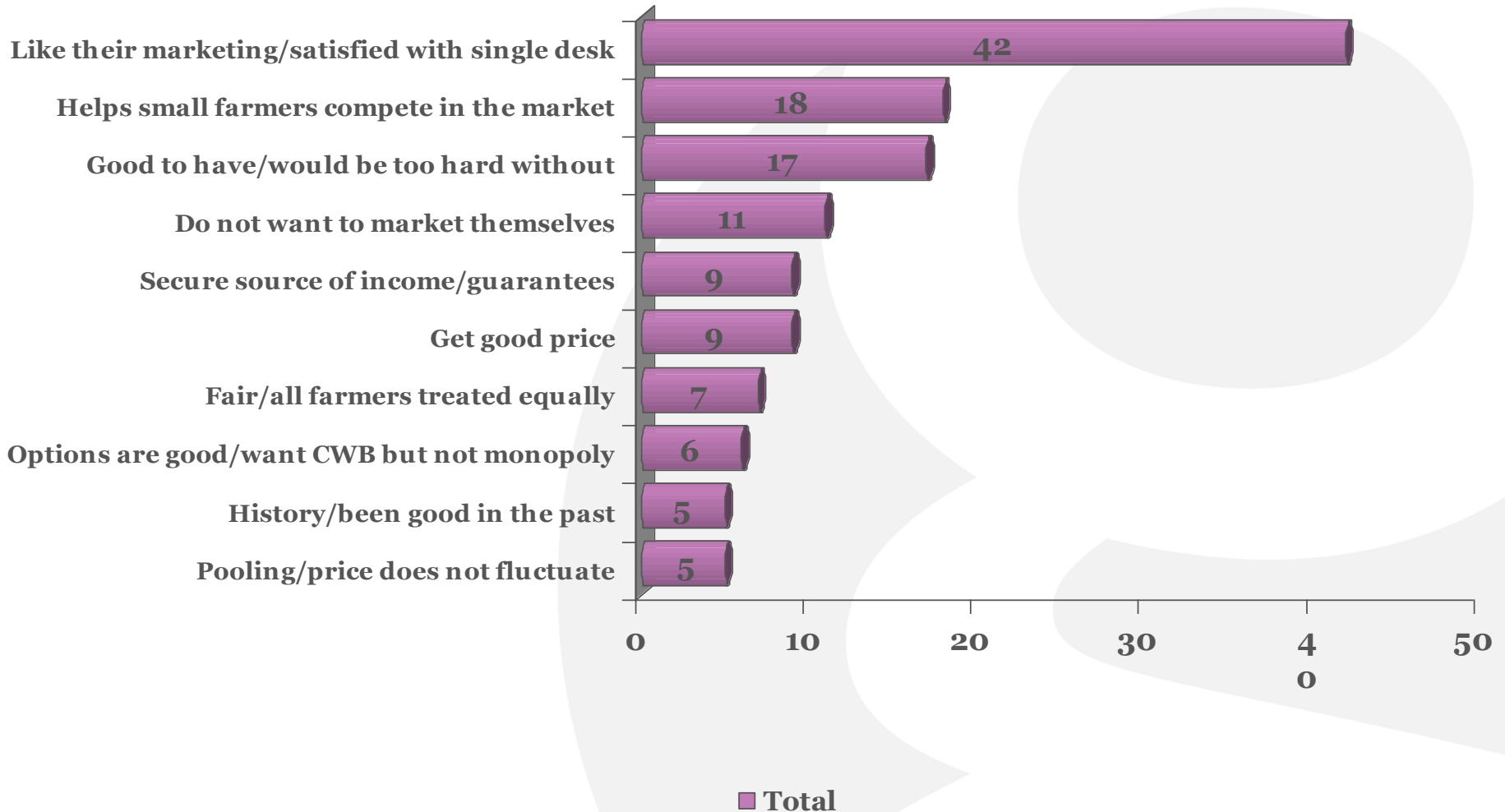
“All things considered, do you support or oppose the Canadian Wheat Board? Is that strongly support, somewhat support, somewhat oppose or strongly oppose?”





# Why Is There Support for the CWB?

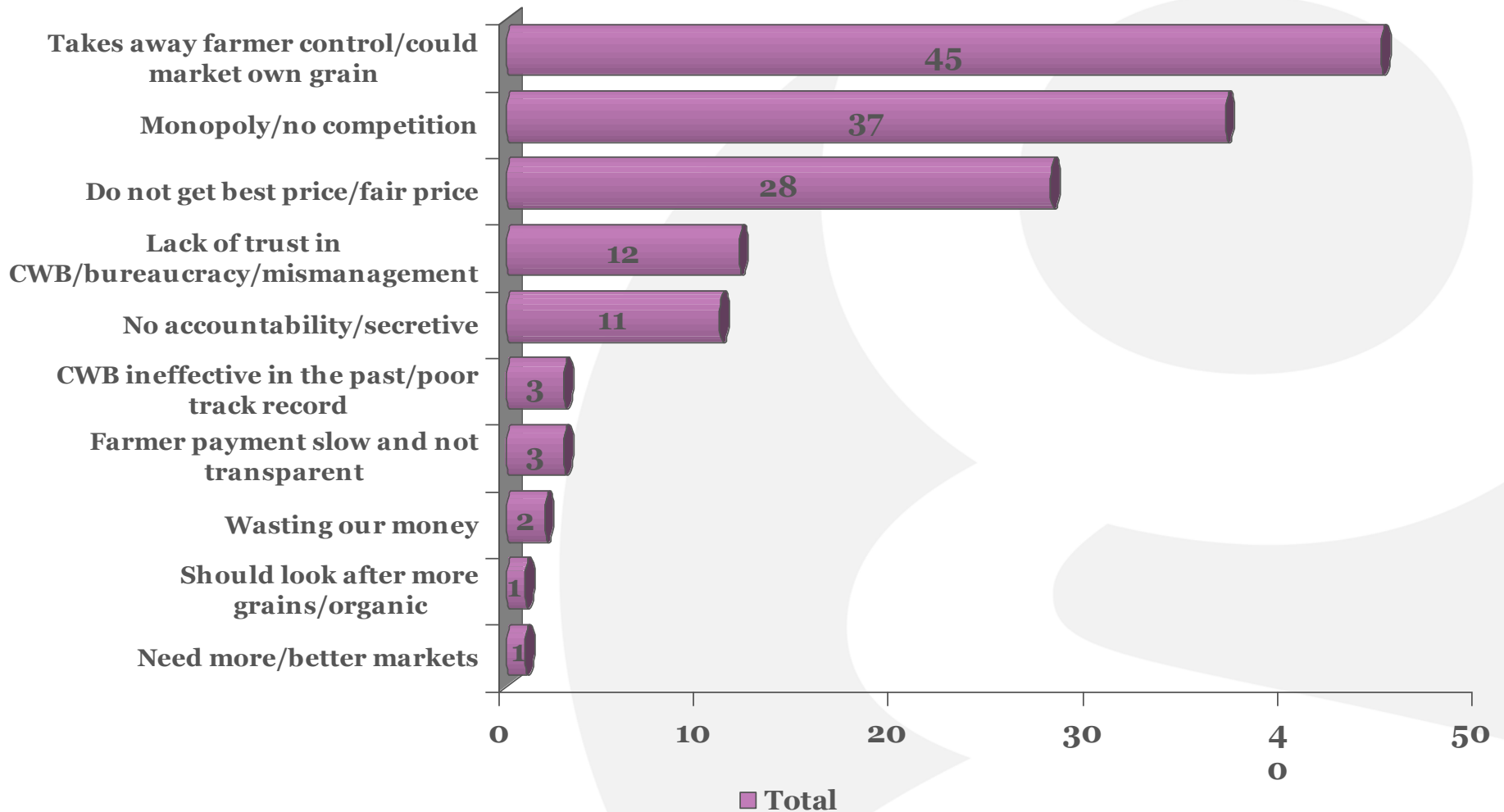
“Why do you support the CWB?” (Of those who support the CWB n=598)





# Why Is There Opposition to the CWB?

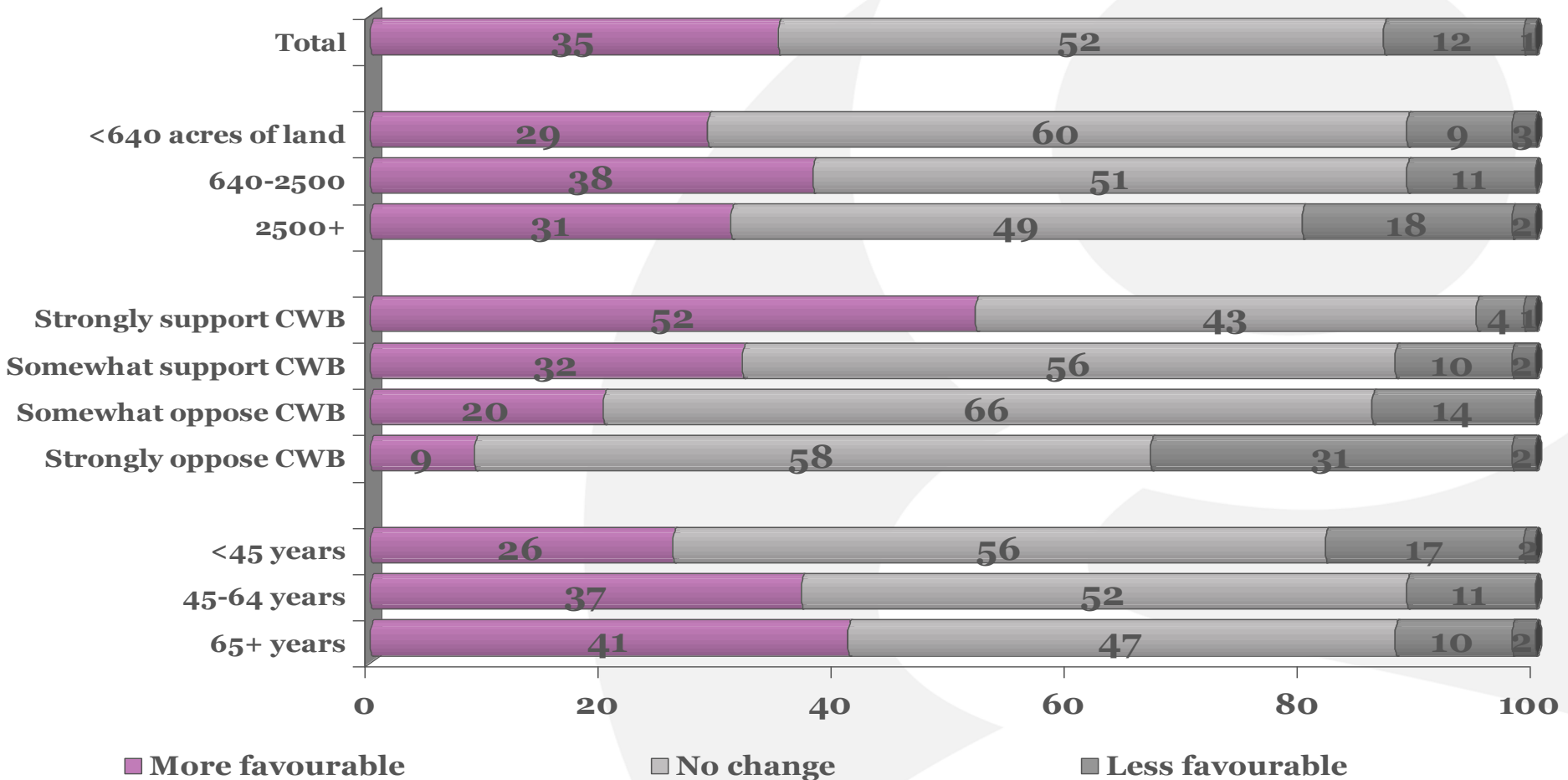
“Why do you oppose the CWB?” (Of those who oppose the CWB n=278)





# Changing Impressions of the CWB

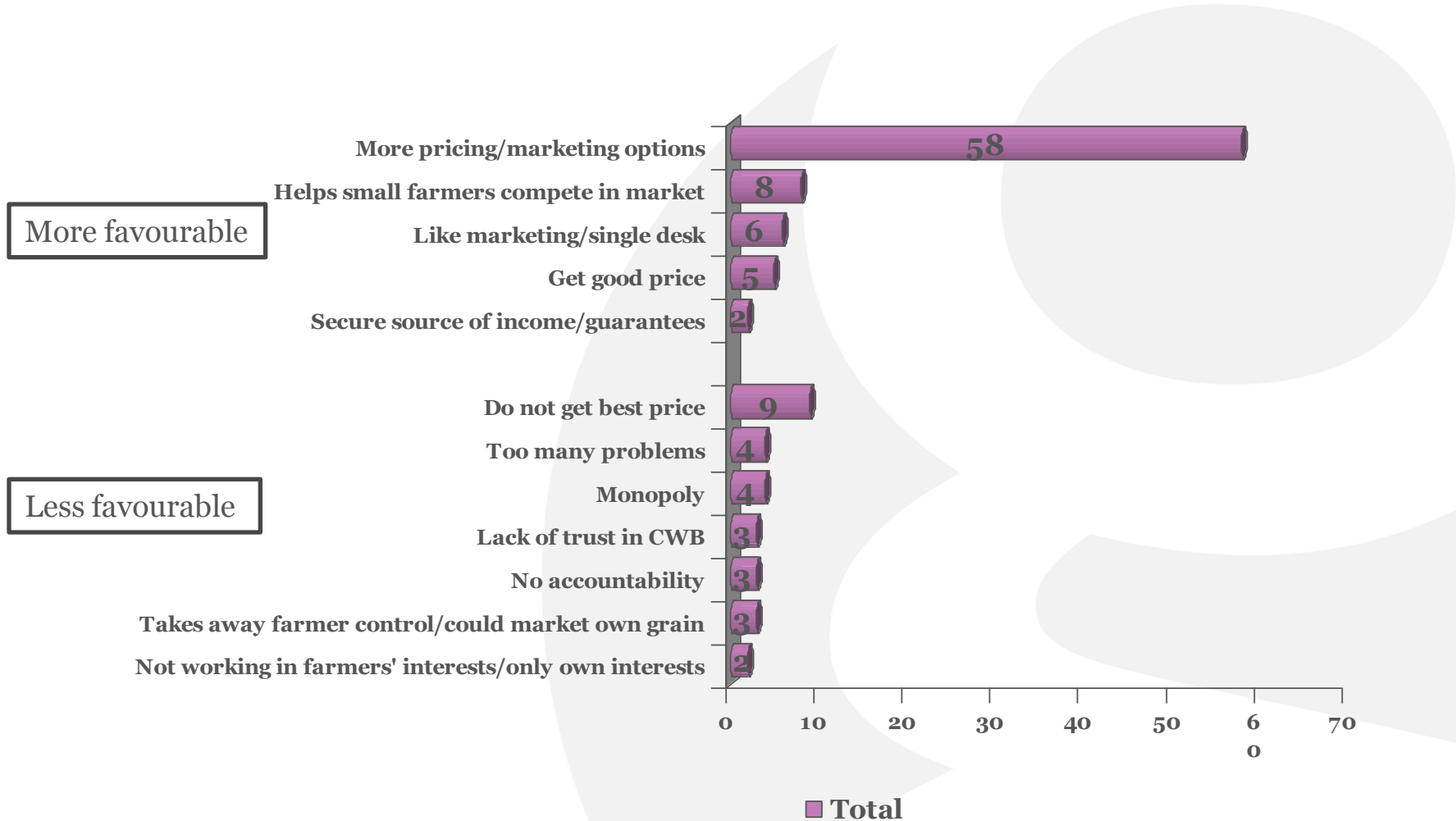
“Which of the following best describes your impression of the Canadian Wheat Board compared to two years ago? Is it more favourable, less favourable or has it not changed?”





# Why Have Impressions of CWB Changed?

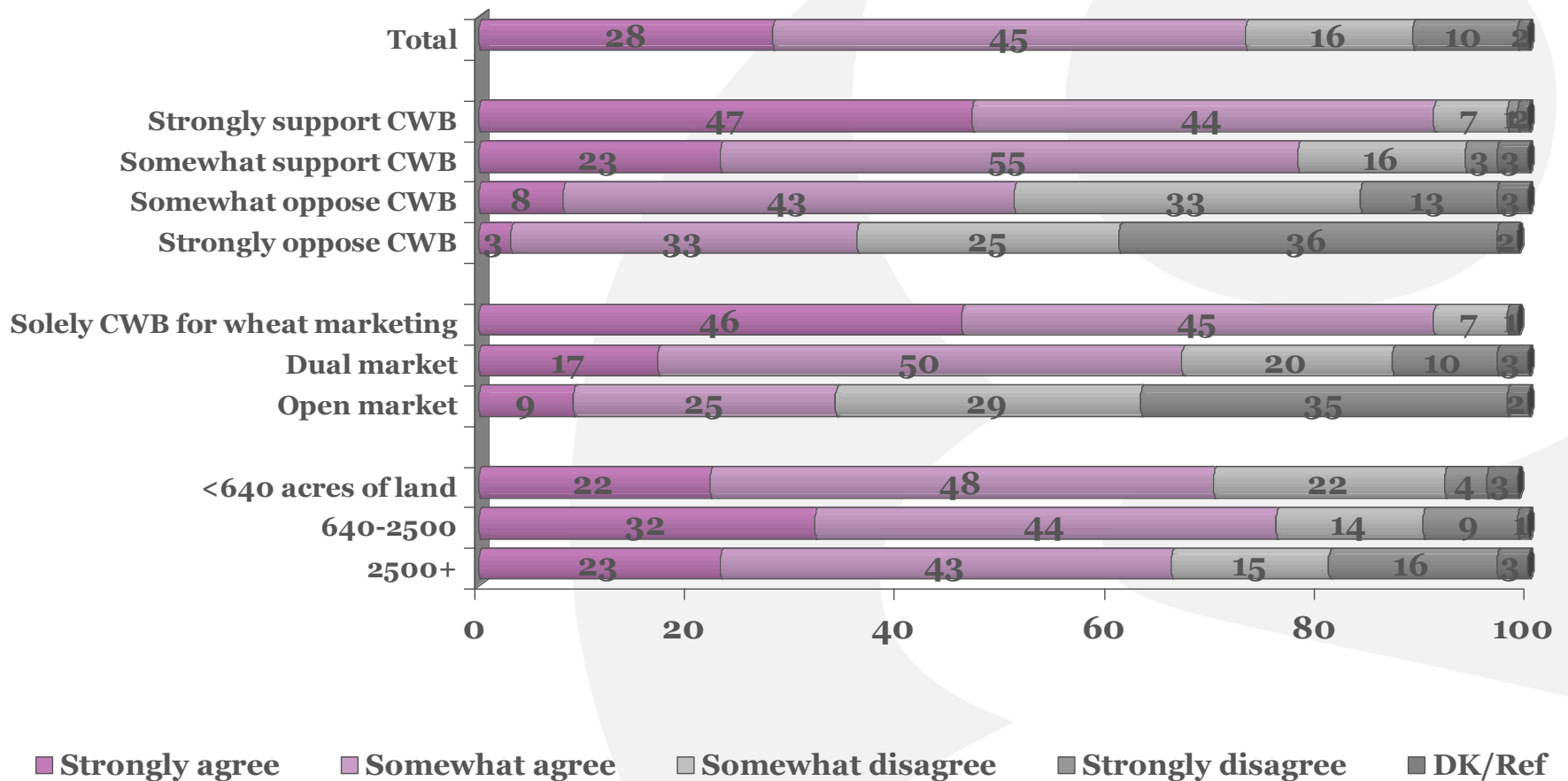
“Why has your impression become more/less favourable?” (Of those whose opinions became more or less favourable towards the CWB n=421)





# Is the CWB Doing a Better Job Than It Used To?

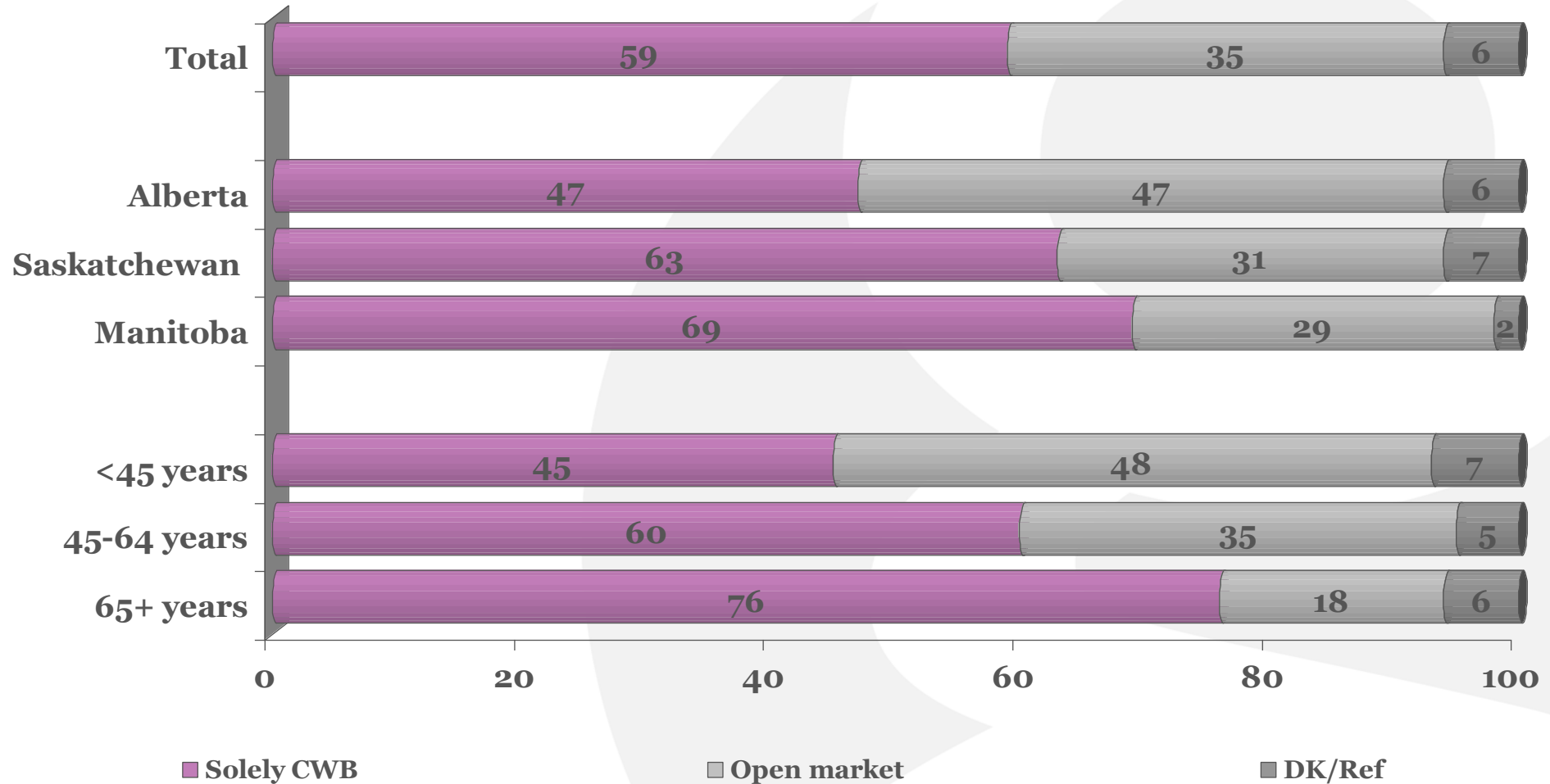
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement. The CWB is doing a better job than it used to.”





# Approaches to Marketing Wheat

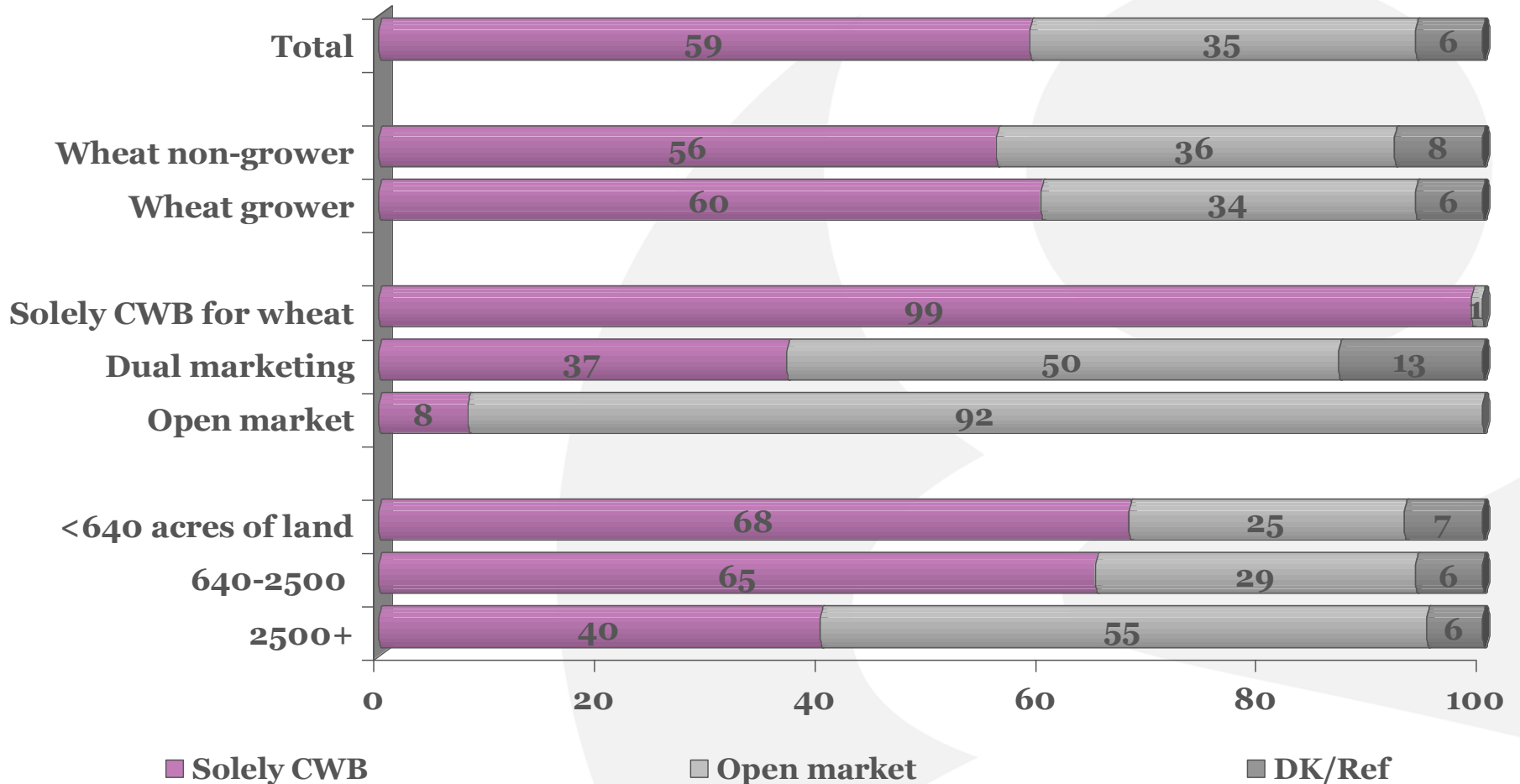
“If you had to choose between the following two options for wheat marketing, which one would you prefer?”





# Approaches to Marketing Wheat

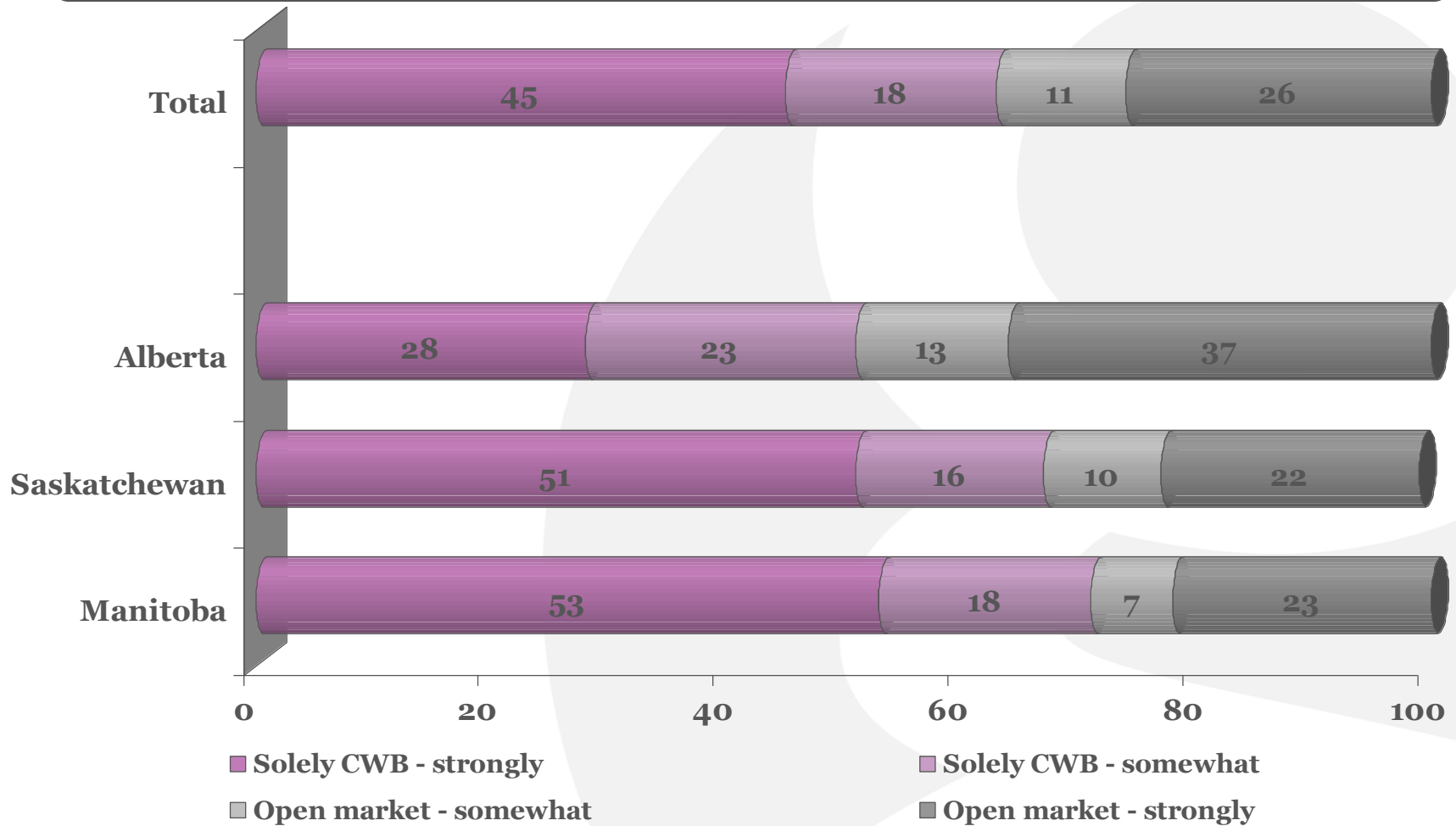
“If you had to choose between the following two options for wheat marketing, which one would you prefer?”





# Approaches to Marketing Wheat

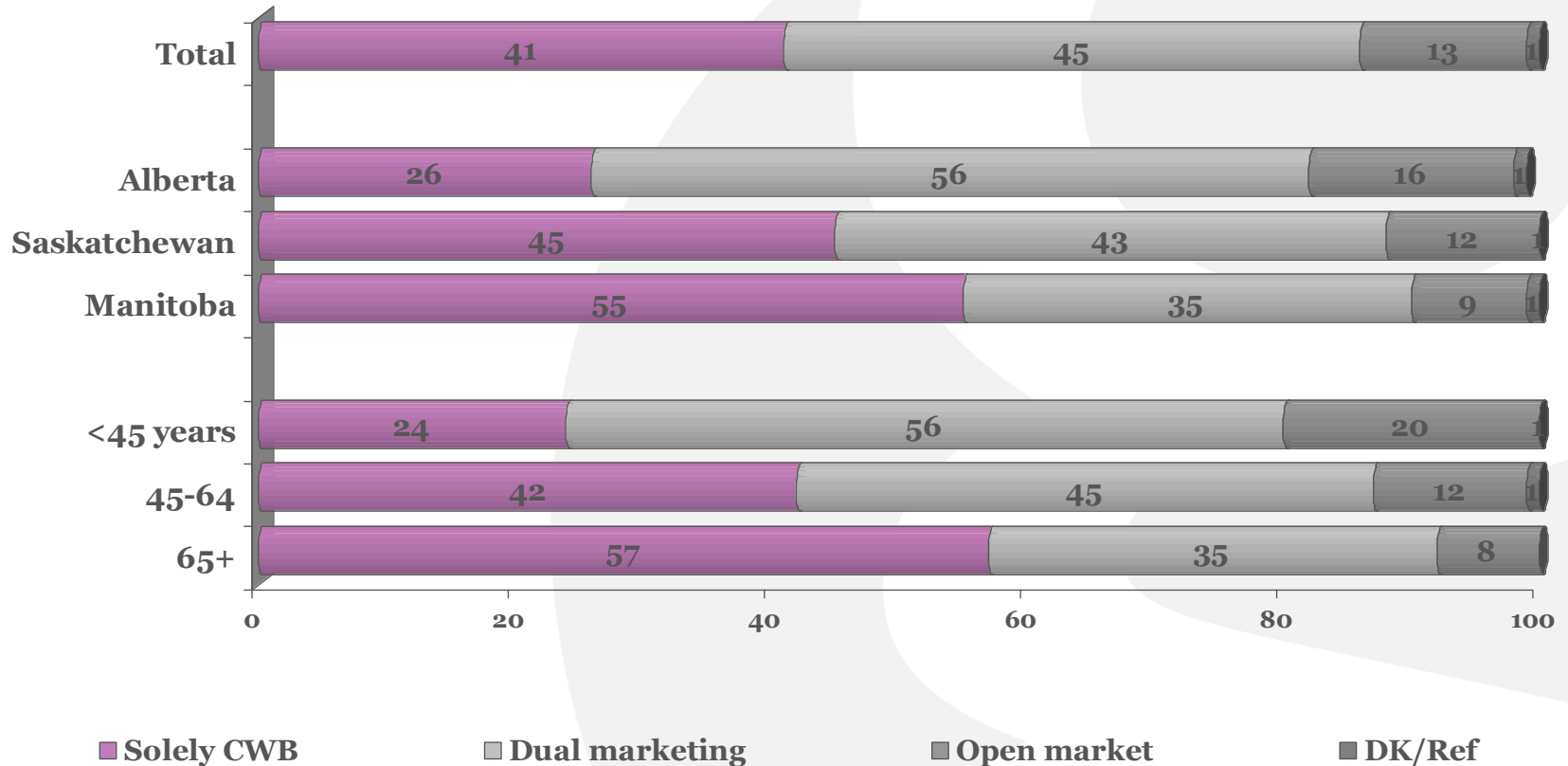
“If you had to choose between the following two options for wheat marketing, which one would you prefer? Would you support that option strongly or just somewhat?”





# Approaches to Marketing Wheat

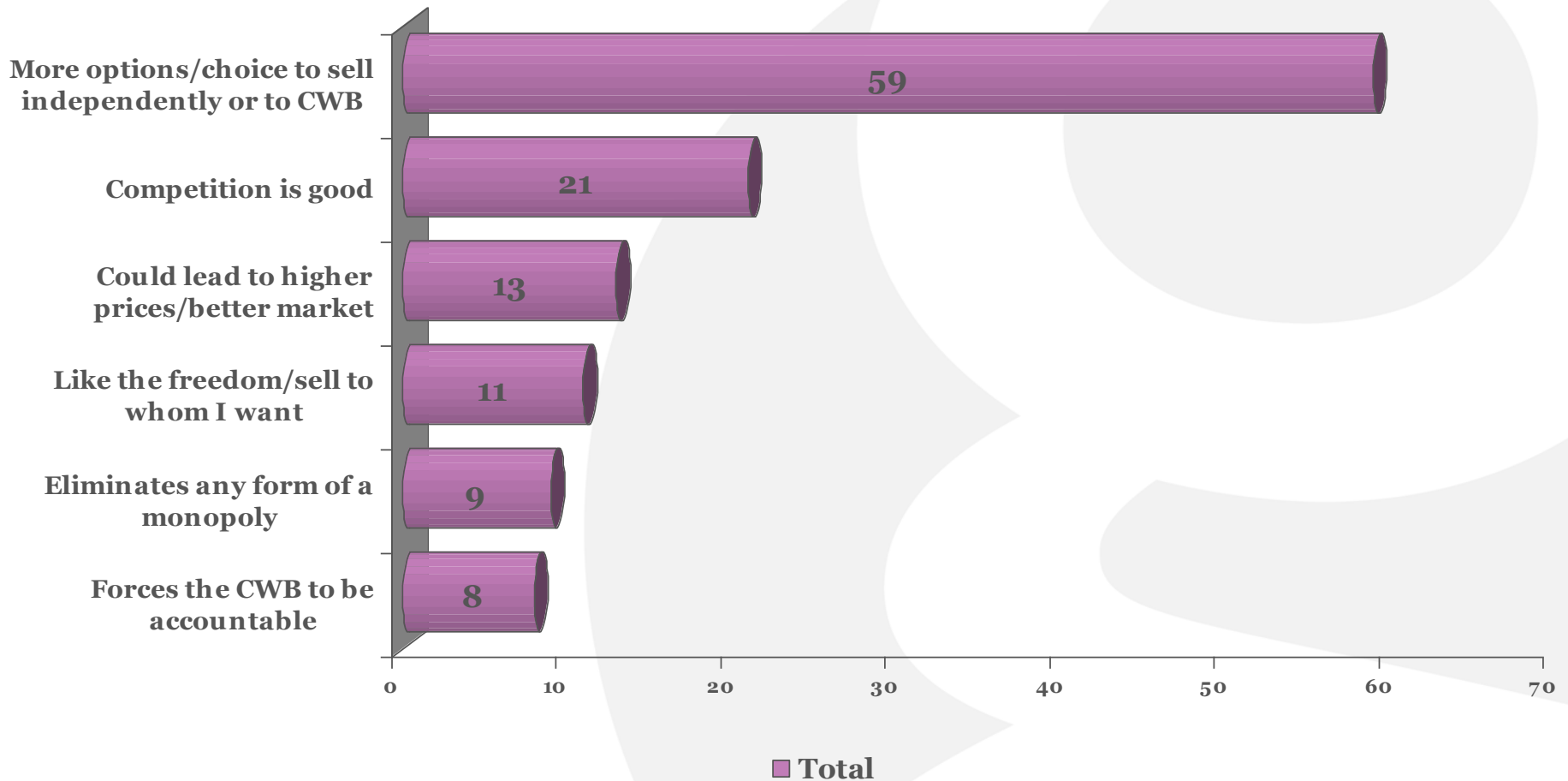
“If you had to choose between three different approaches to marketing wheat, which of the following would you prefer?”





# Reasons for Support for Dual Marketing Over the Single Desk

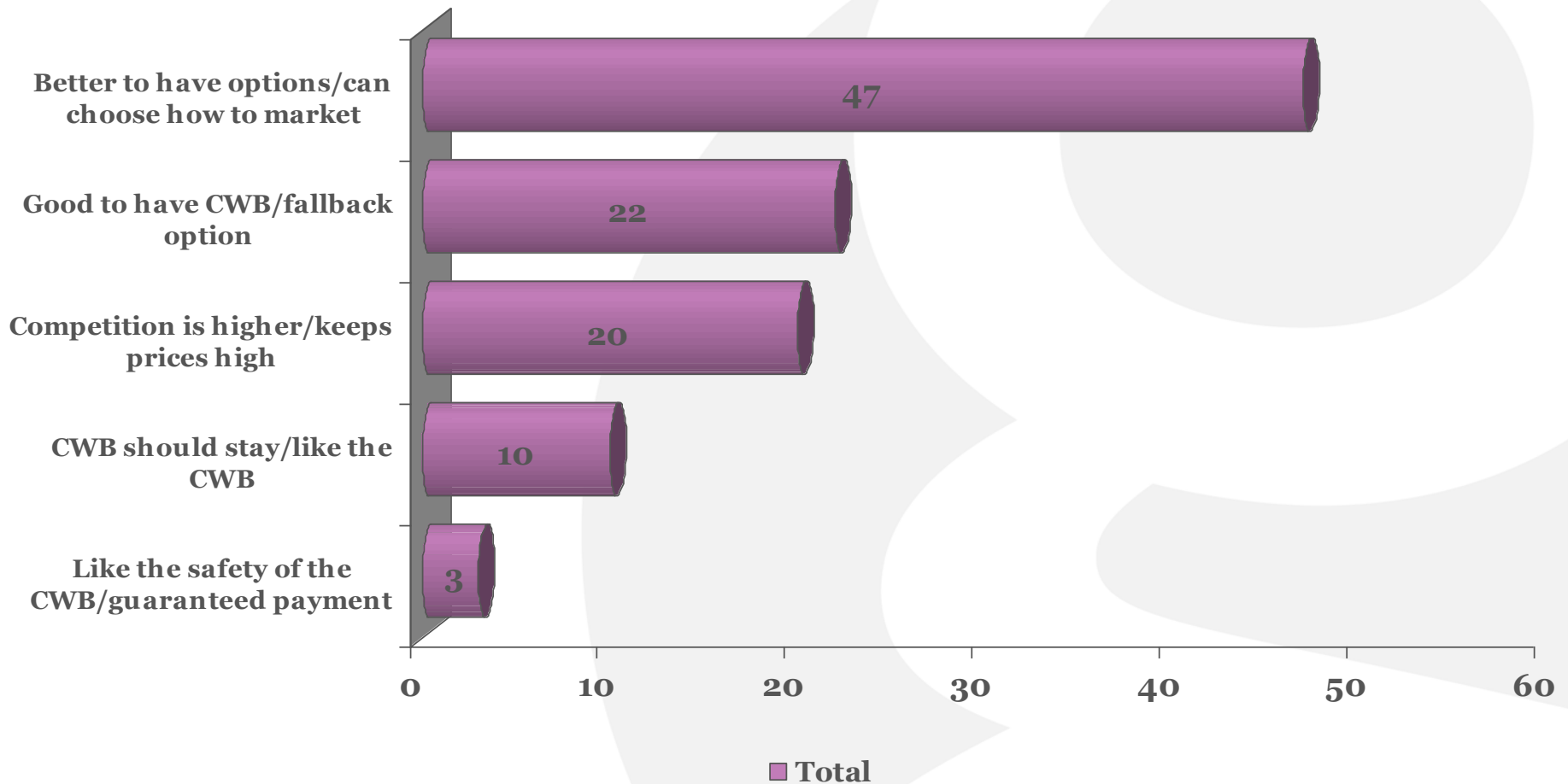
“Why do you support dual marketing instead of the single desk (for wheat marketing)?” (Of those who support dual marketing for wheat n=409)





# Reasons for Support for Dual Marketing Over Open Market

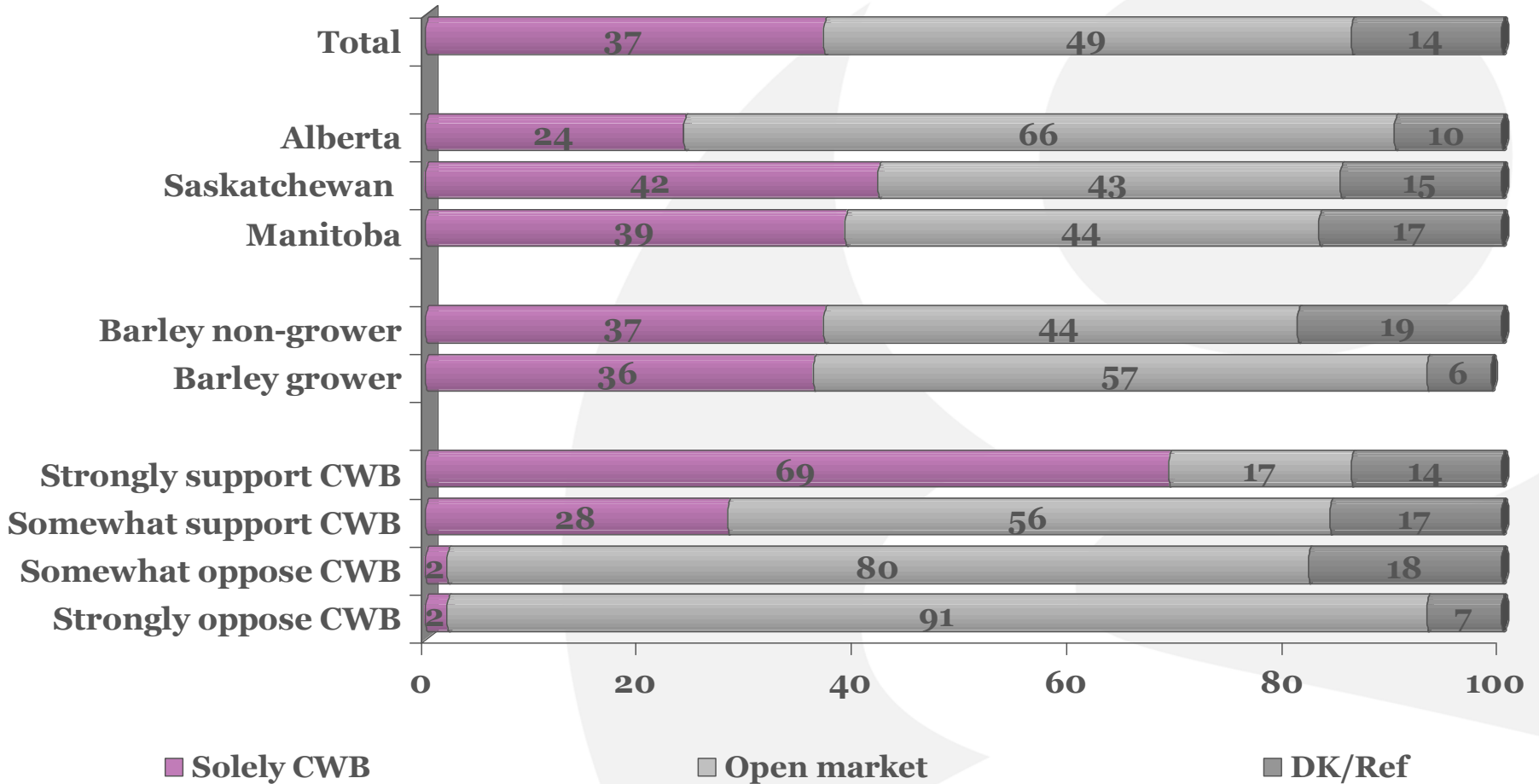
“Why do you support dual marketing instead of an open market (for wheat marketing)?” (Of those who support dual marketing for wheat n=409)





# Approaches to Marketing Barley

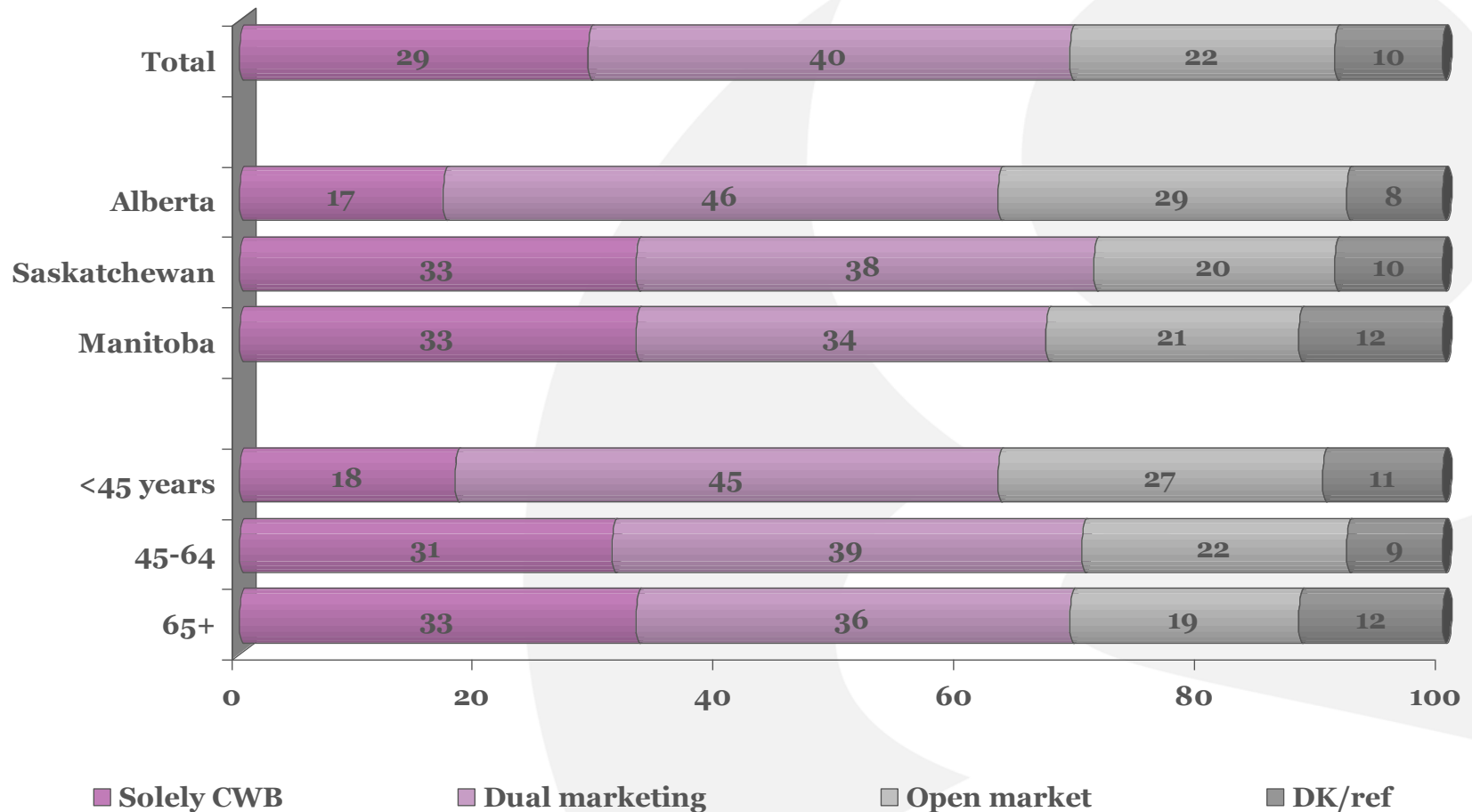
“If you had to choose between the following two options for barley marketing, which one would you prefer?”





# Approaches to Marketing Barley

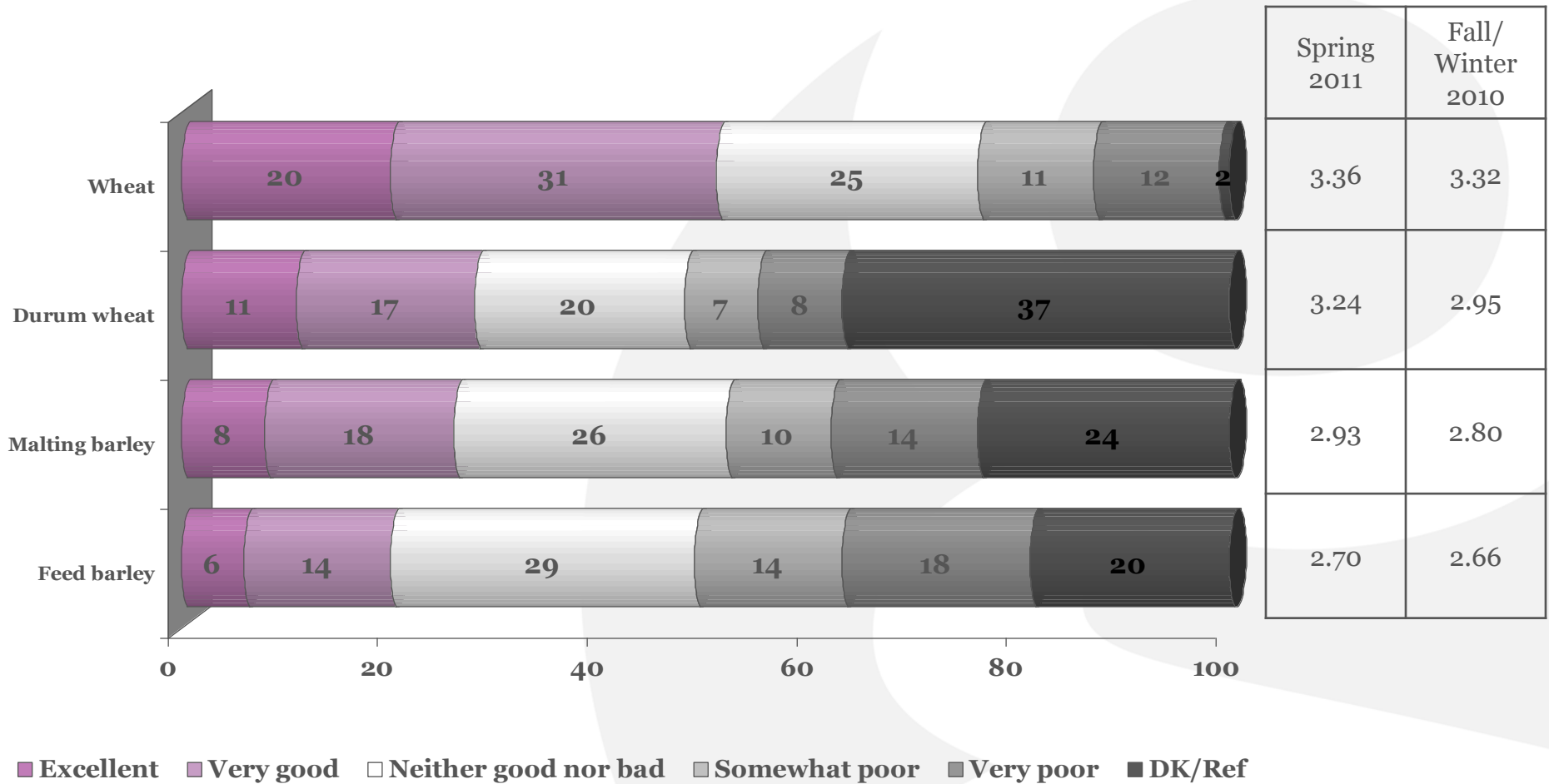
“If you had to choose between three different approaches to marketing barley, which of the following would you prefer?”





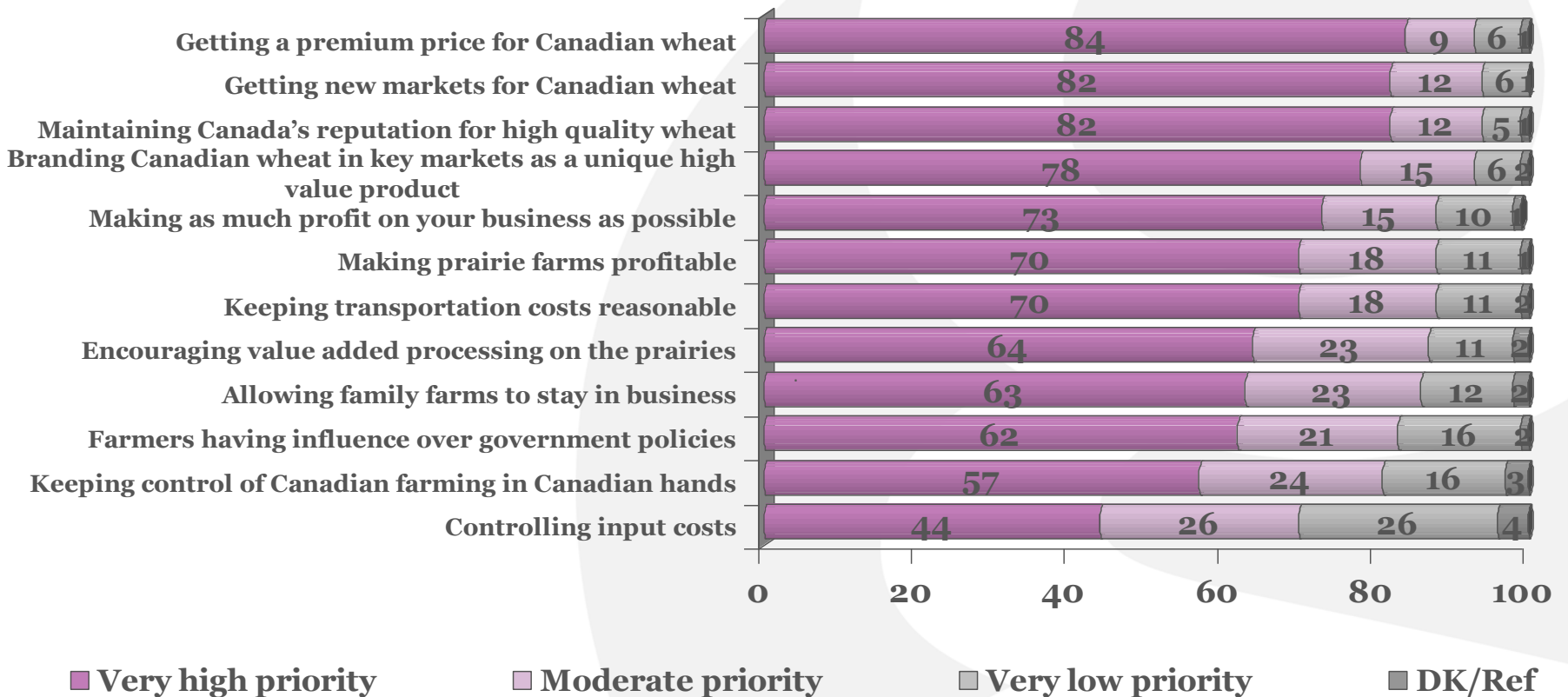
# Grain Marketing Performance

“On a scale of one to five where one is very poor and five is excellent, please give your rating of the performance of the Canadian Wheat Board in the marketing of the following grains.” (DK Removed)





“I’m going to read you the same list of issues, and I’d like you to tell me how important a priority each issue should be for the CWB on a scale of one to nine, where one is a very low priority, and nine is a very high priority. Please tell me with a score of one to nine what kind of priority you would place on the CWB \_\_\_\_\_.”

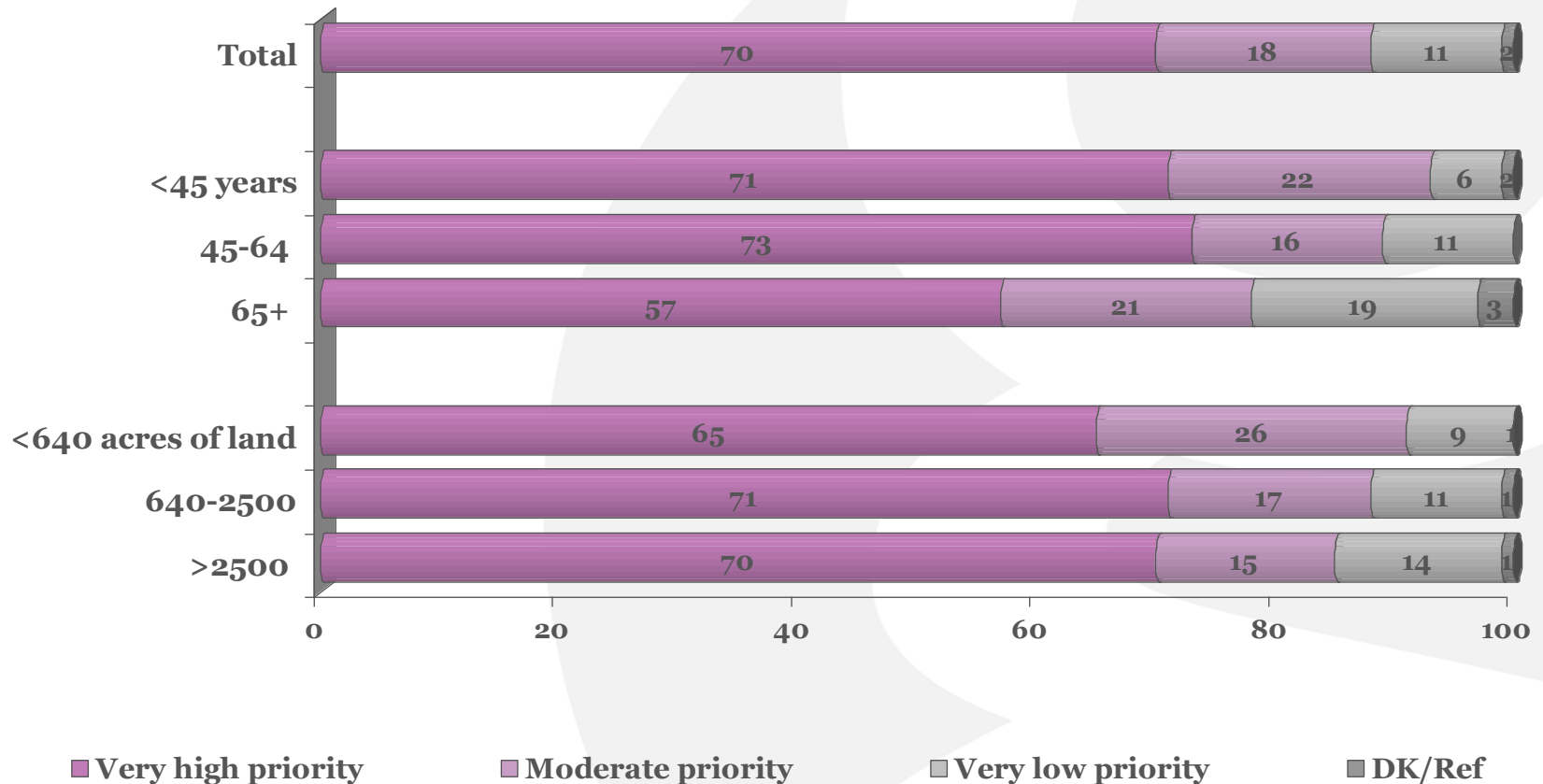




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# Priority of Keeping Transportation Costs Reasonable

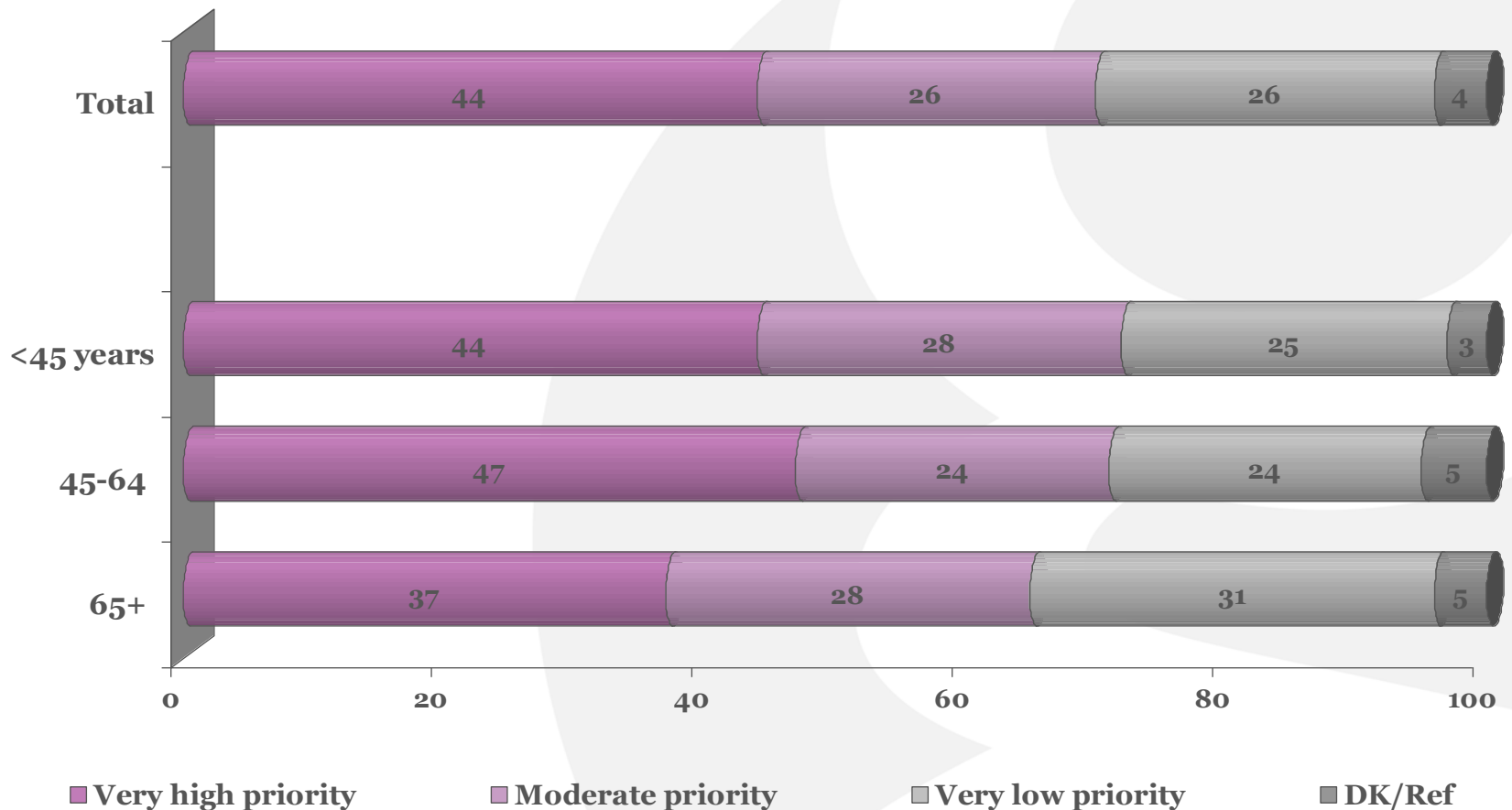
“I’m going to read you the same list of issues, and I’d like you to tell me how important a priority each issue should be for the CWB on a scale of one to nine, where one is a very low priority, and nine is a very high priority. Please tell me with a score of one to nine what kind of priority you would place on the CWB keeping transportations costs reasonable.”





# Priority of Controlling Input Costs

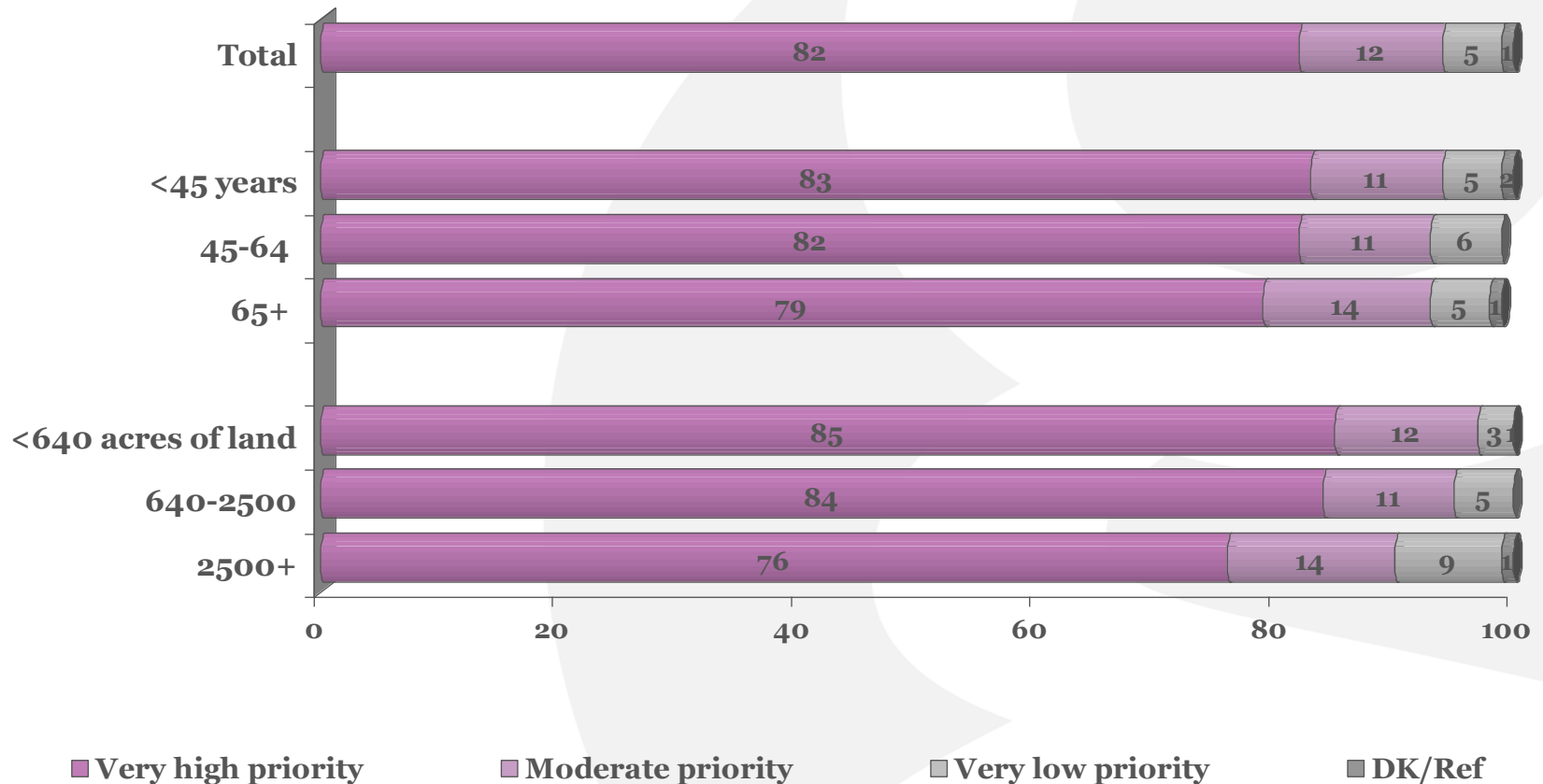
“I’m going to read you the same list of issues, and I’d like you to tell me how important a priority each issue should be for the CWB on a scale of one to nine, where one is a very low priority, and nine is a very high priority. Please tell me with a score of one to nine what kind of priority you would place on the CWB controlling input costs.”





# Priority of Maintaining Canada's Reputation for High Quality Wheat

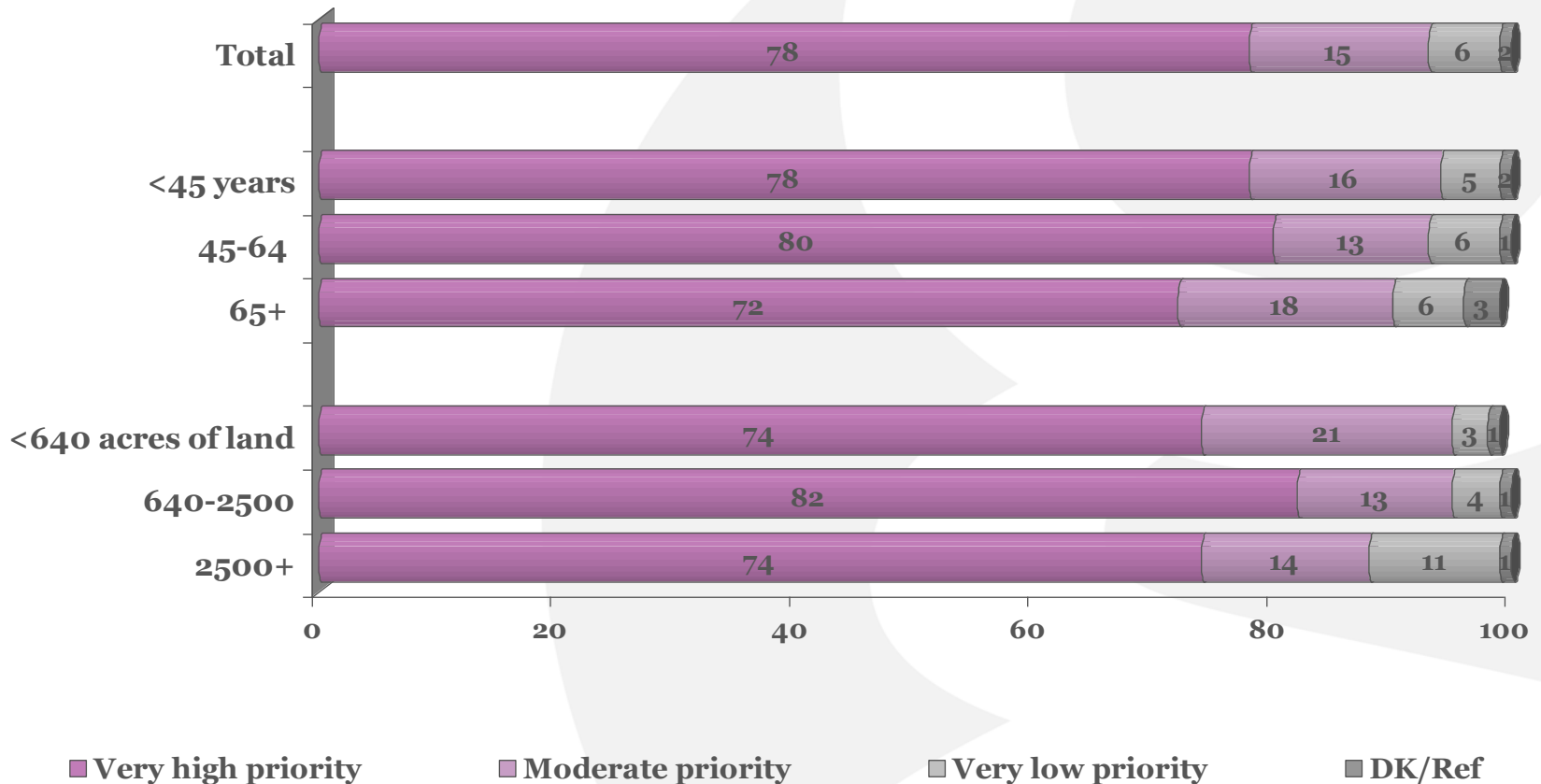
"I'm going to read you the same list of issues, and I'd like you to tell me how important a priority each issue should be for the CWB on a scale of one to nine, where one is a very low priority, and nine is a very high priority. Please tell me with a score of one to nine what kind of priority you would place on the CWB maintaining Canada's reputation for high quality wheat."





# Priority of Branding Canadian Wheat As a High Value Product?

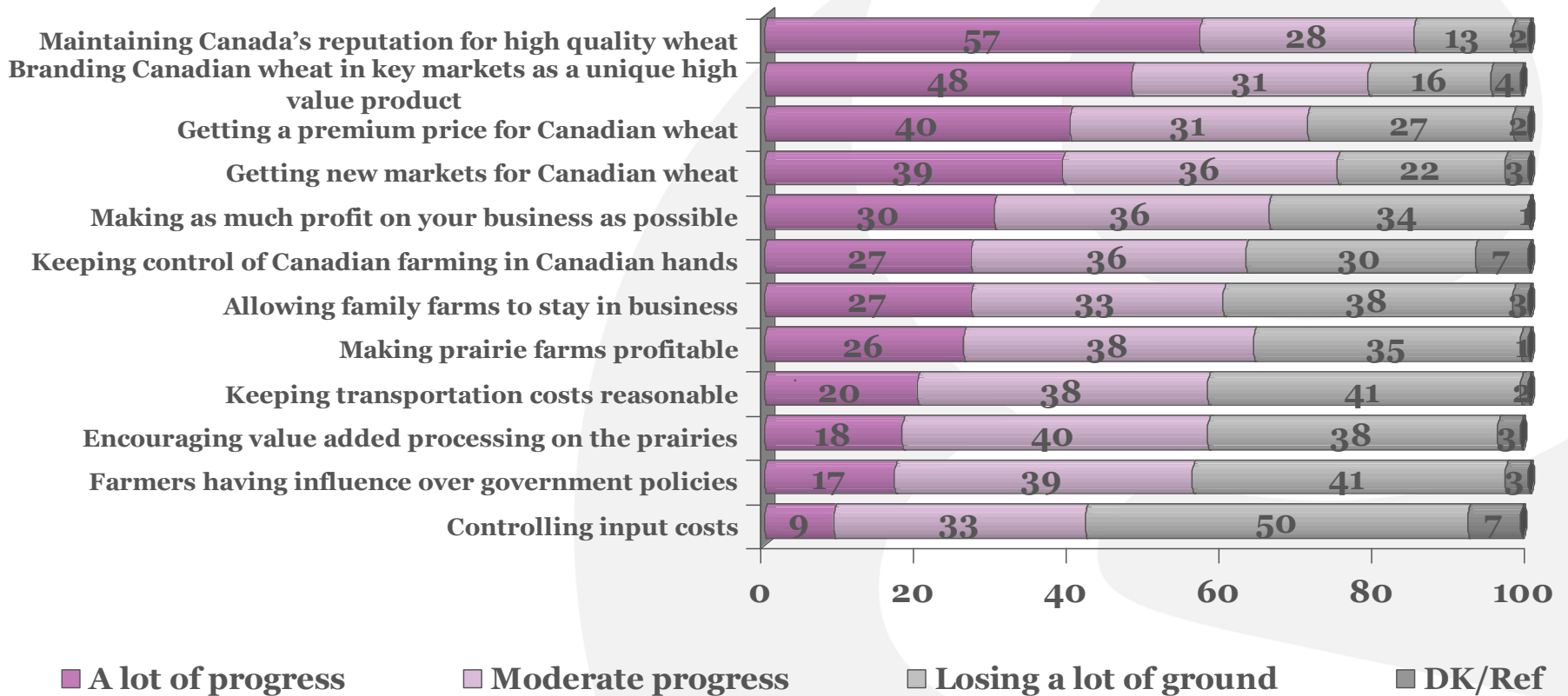
“I’m going to read you the same list of issues, and I’d like you to tell me how important a priority each issue should be for the CWB on a scale of one to nine, where one is a very low priority, and nine is a very high priority. Please tell me with a score of one to nine what kind of priority you would place on the CWB branding Canadian wheat in key markets as a unique high value product.”





# Losing Ground or Making Progress

“I’m going to list a number of objectives for farmers and agriculture, and ask you whether you think the CWB is making progress or losing ground on each objective, with one being losing a lot of ground, and nine being making a lot of progress. Please tell me with a score of one to nine whether the CWB is making progress or losing ground on \_\_\_\_\_.”





# Progress on Getting New Markets for Canadian Wheat

“I’m going to list a number of objectives for farmers and agriculture, and ask you whether you think the CWB is making progress or losing ground on each objective, with one being losing a lot of ground, and nine being making a lot of progress. Please tell me with a score of one to nine whether the CWB is making progress or losing ground on getting new markets for Canadian wheat.”

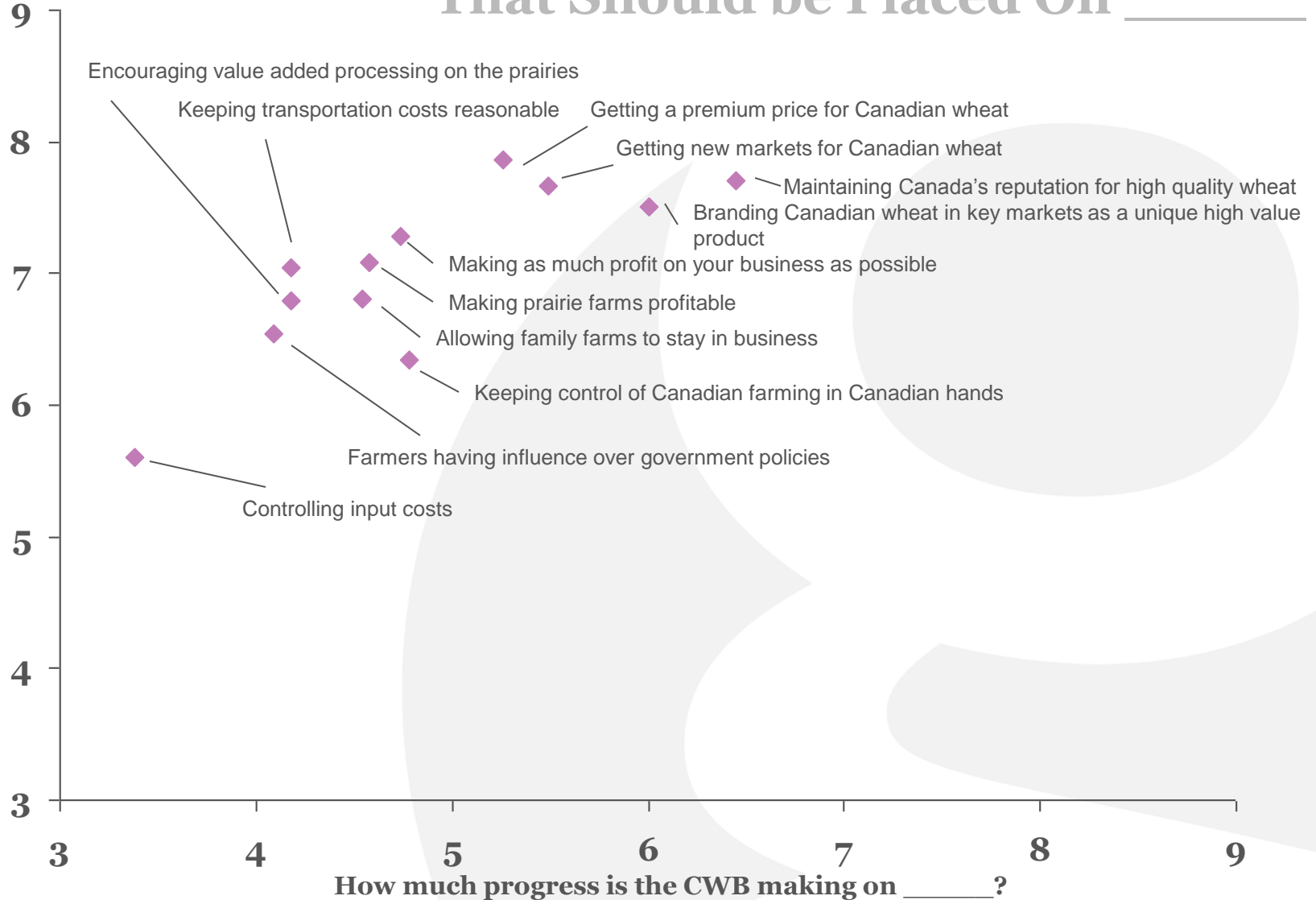




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# Progress Made and The Priority That Should be Placed On \_\_\_\_\_

How much of a priority should \_\_\_\_\_ be for the CWB?





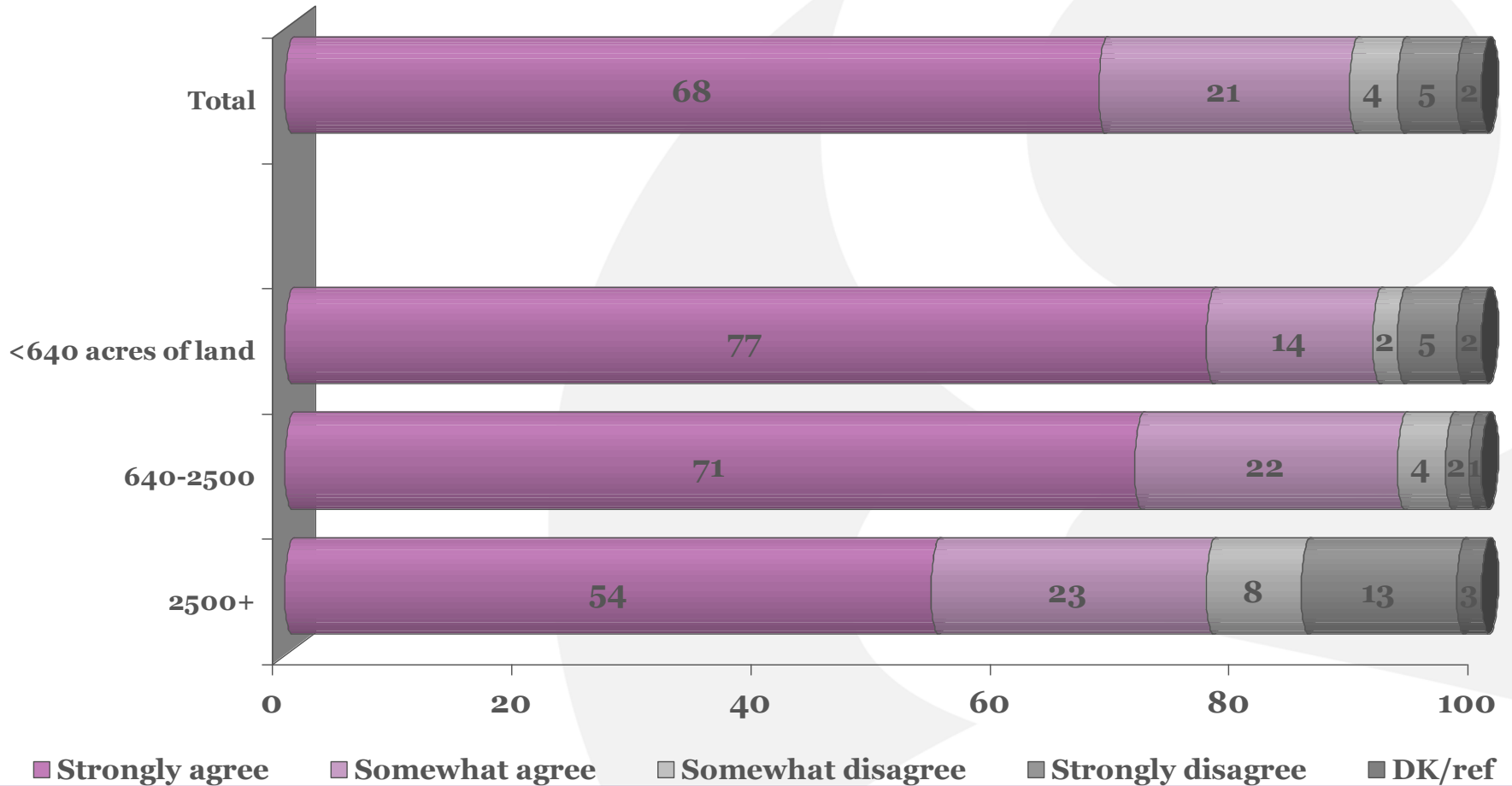
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement.”





# Should the CWB Care About Landholders of All Sizes Equally?

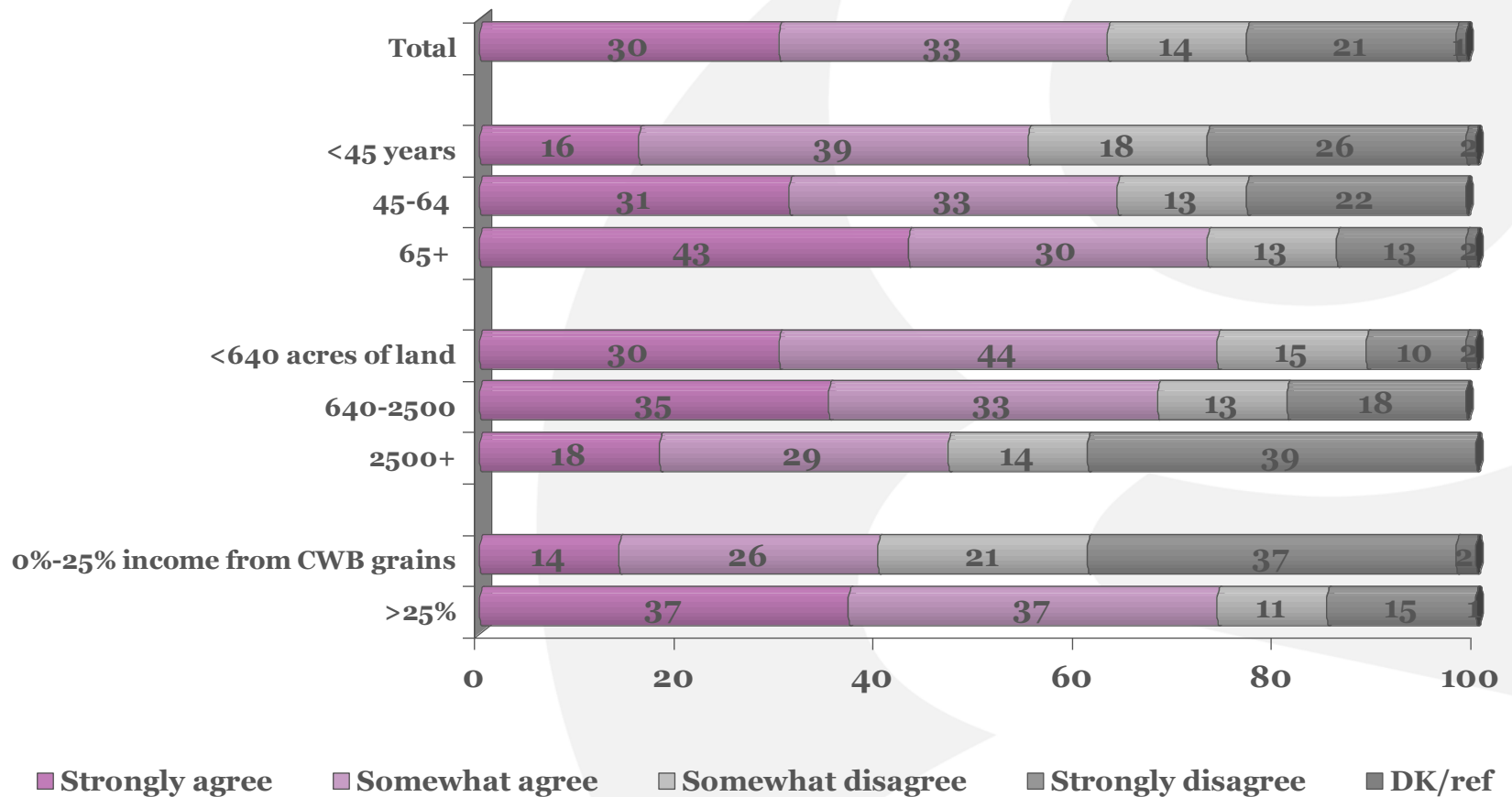
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement. The CWB should care about every farmer equally, no matter how much land they own.”





# Does the CWB Provide a Sense of Security for Farmers' Businesses?

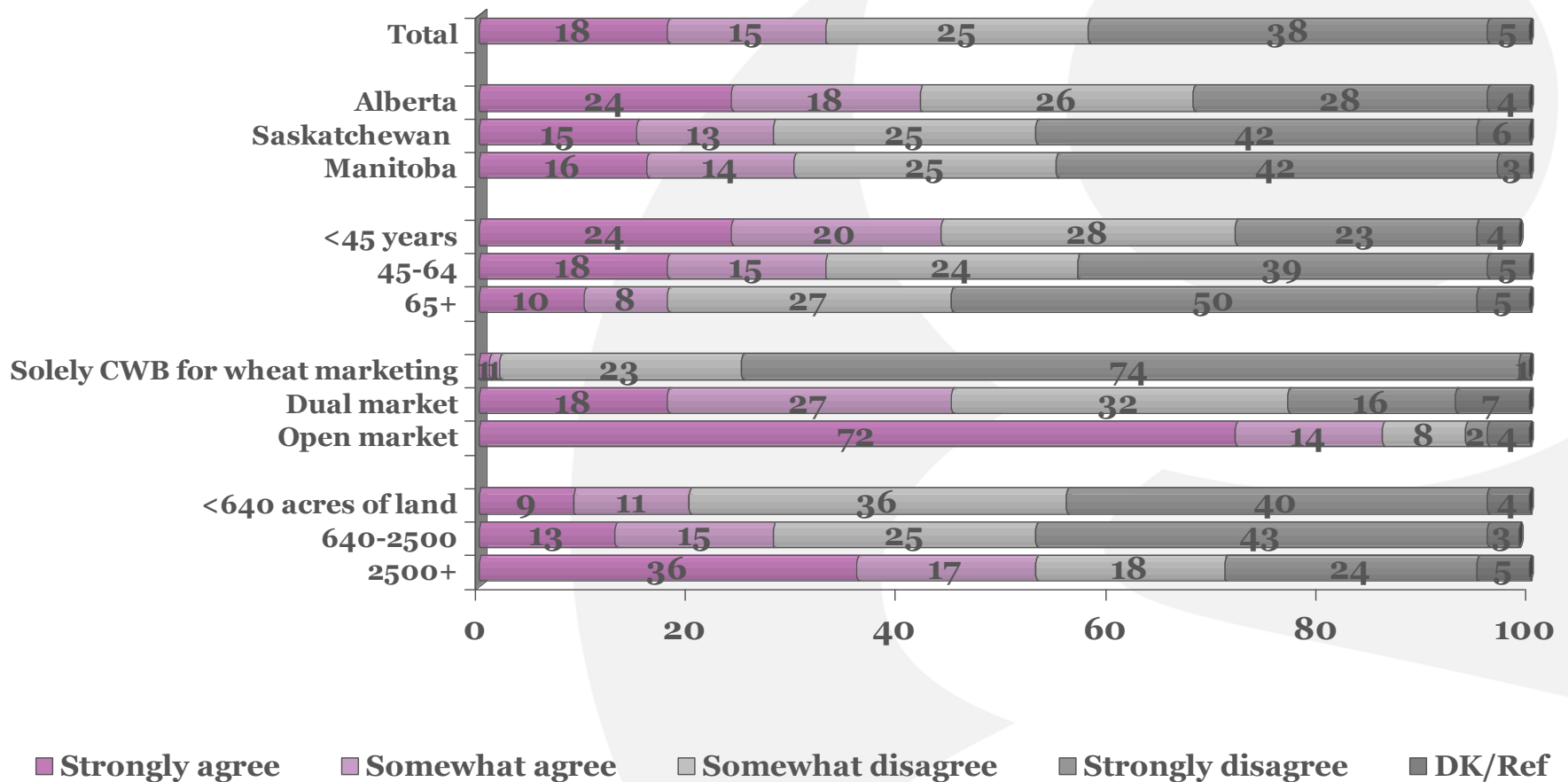
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement. The Canadian Wheat Board provides me with a sense of security for my business.”





# Do Farmers Believe They Would Make More Money Without CWB?

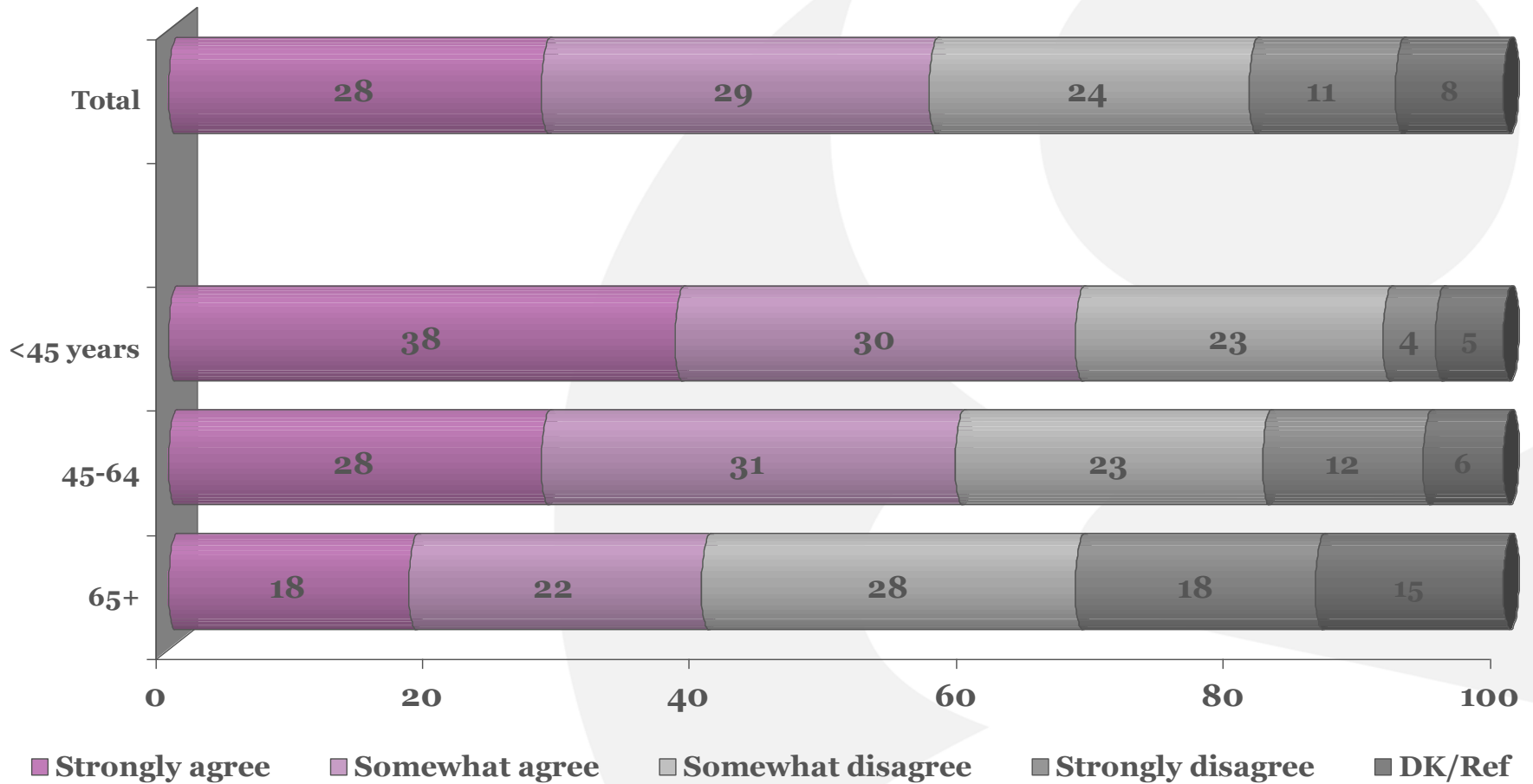
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement. I would make more money if the CWB did not exist.”





# Are Farmers Happier With Prices They Get for Non-CWB Grains?

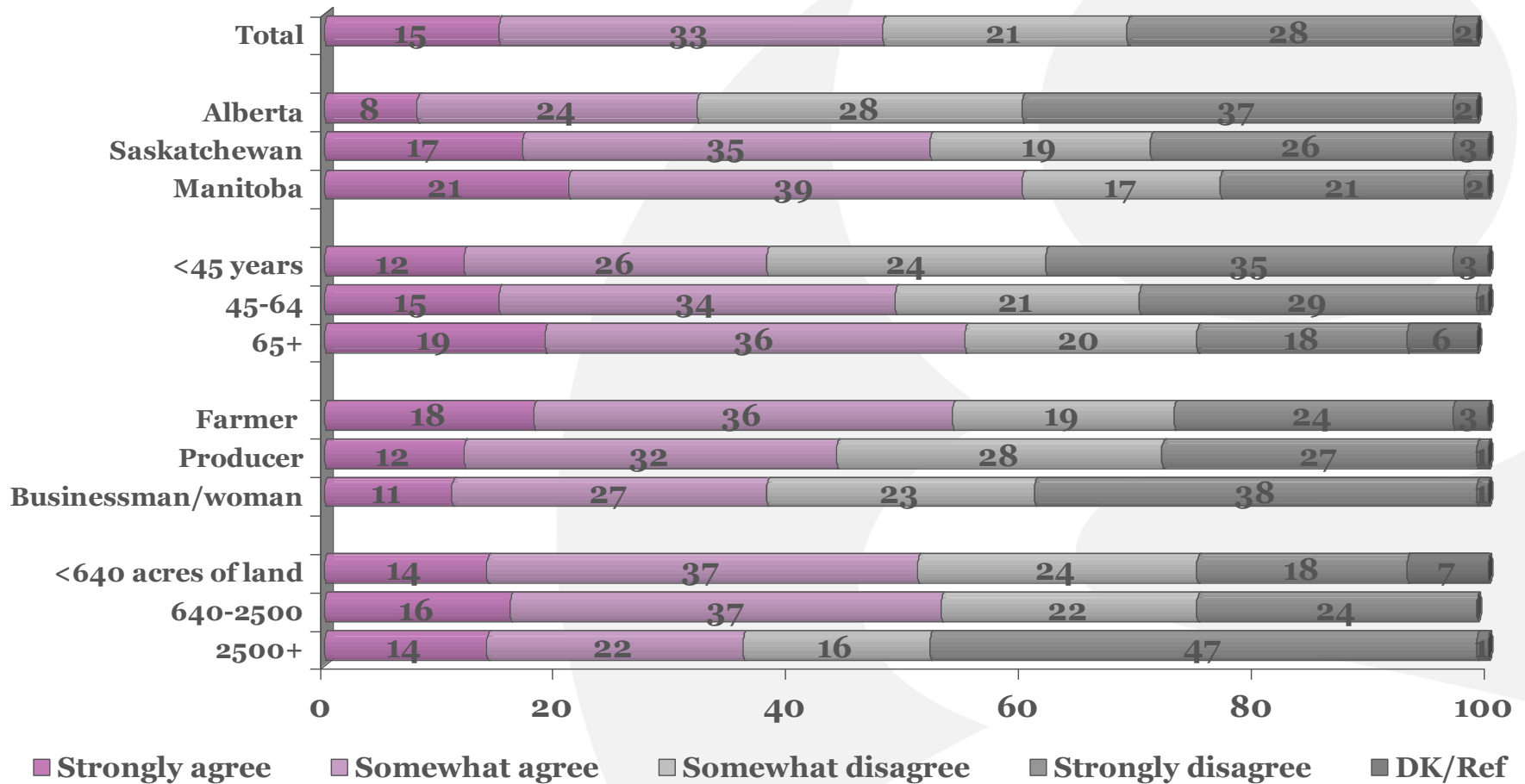
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement. I am happier with the prices I get for non-CWB grains than I am for wheat or durum.”





# Do Farmers Feel a Sense of Ownership Over the CWB?

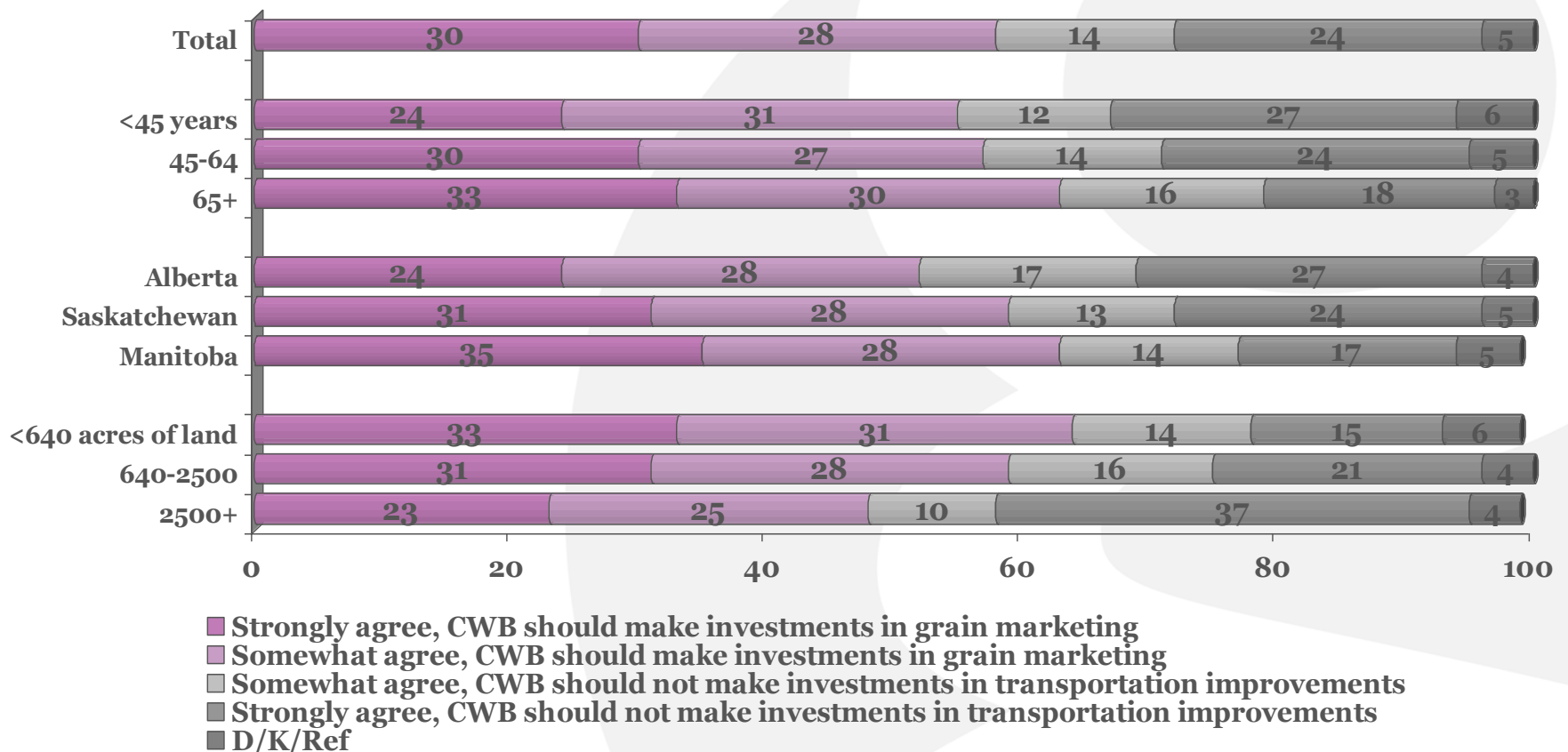
“Now I am going to read you some statements that various people have made about aspects of the grain marketing system. Please tell me whether you strongly or somewhat agree or disagree with each statement. I feel a sense of ownership over the CWB.”





# Investments in Grain Marketing

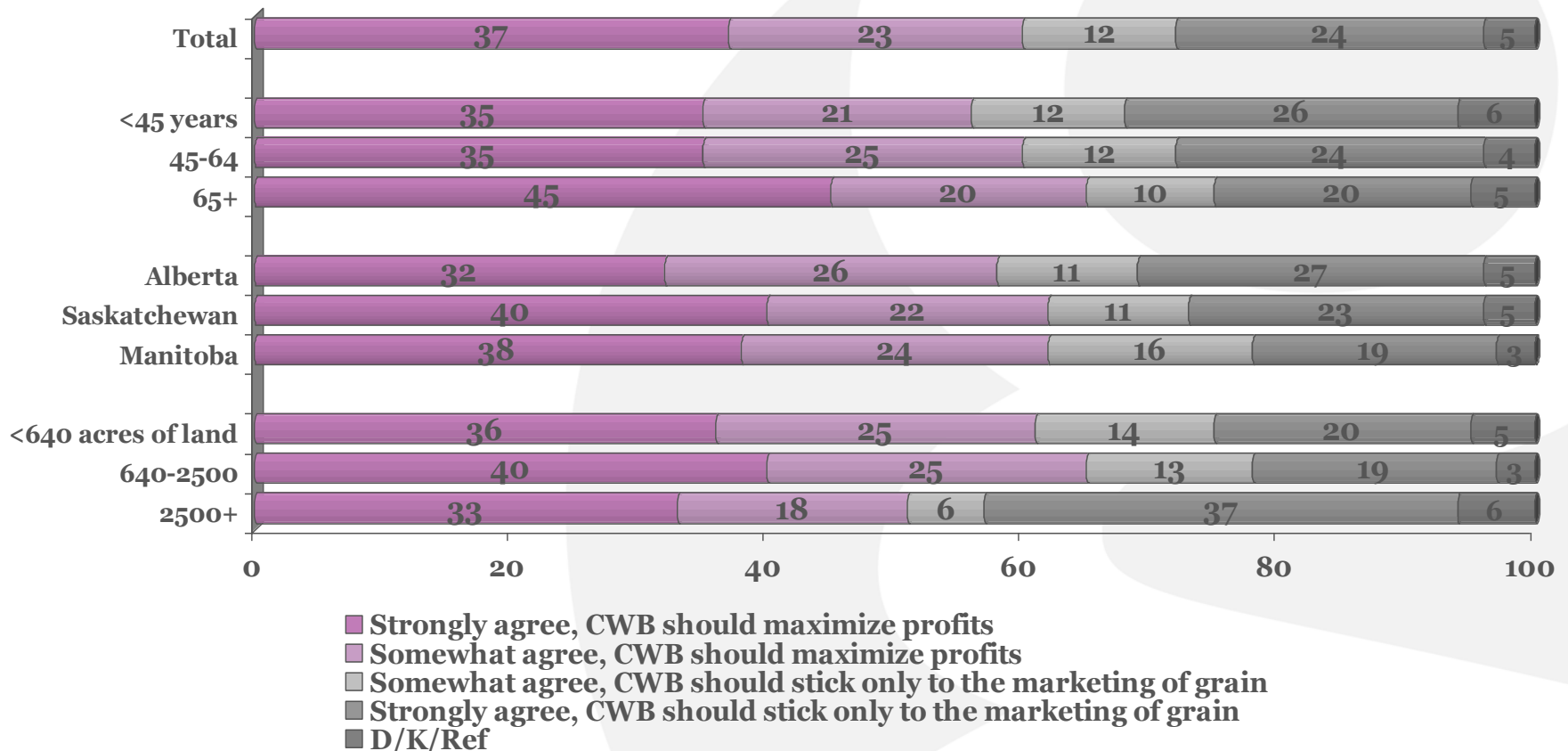
“Some/other people say that the CWB should make investments, such as buying lake shipping vessels or grain hopper cars, if it thinks that will improve its ability to market grain. Other/some people say that the CWB should not be investing money in transportation improvements. Which of those two views is closer to your own? Do you feel that way strongly or just somewhat?”





# Should CWB Stick To Marketing Grains Only?

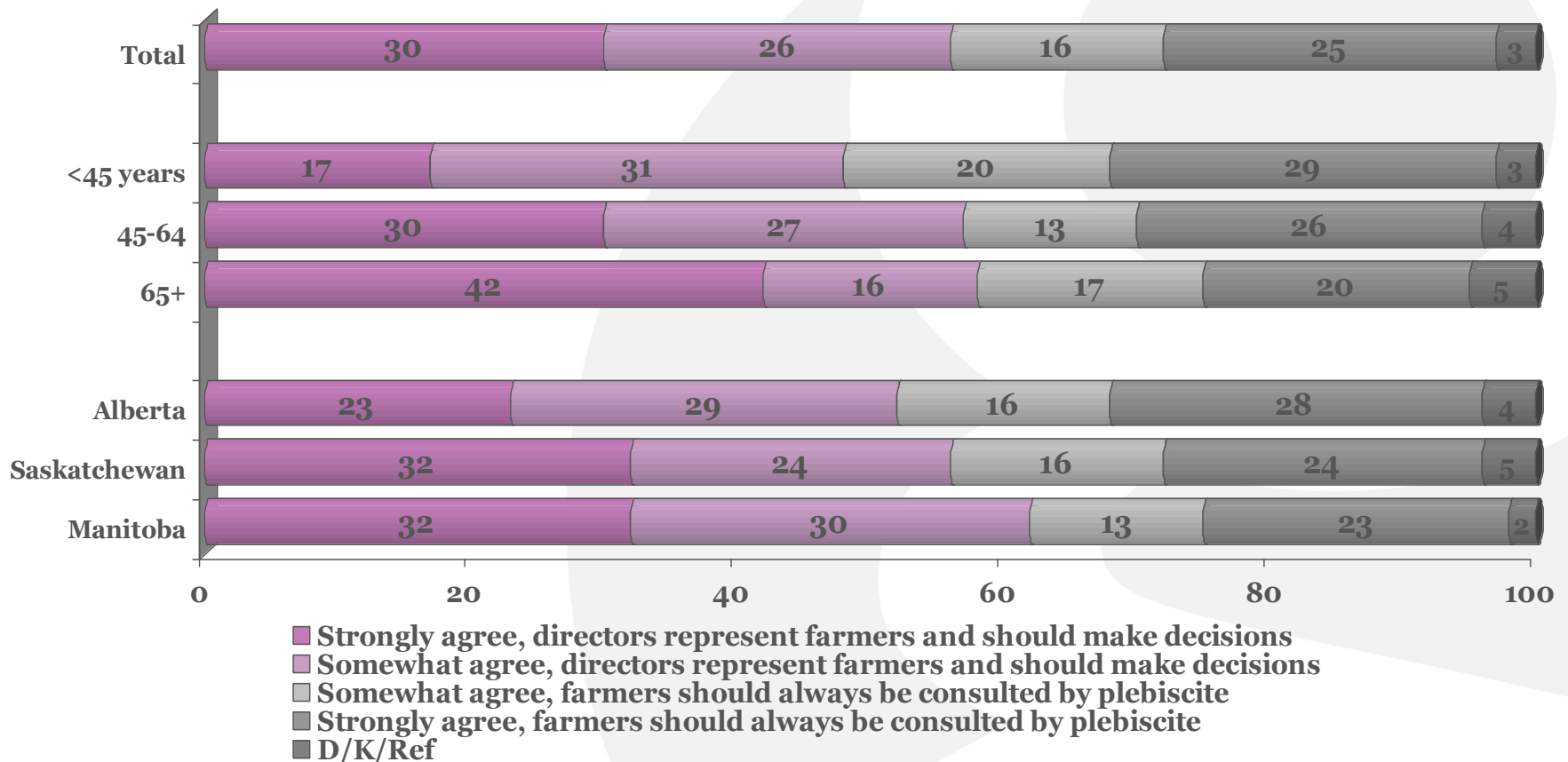
“Some/other people say that the CWB should do what is necessary to maximize profits and returns to prairie farmers. Other/some people think that the CWB should stick only to the marketing of grain. Which of those is closer to your own view? Do you feel that way strongly or just somewhat?”





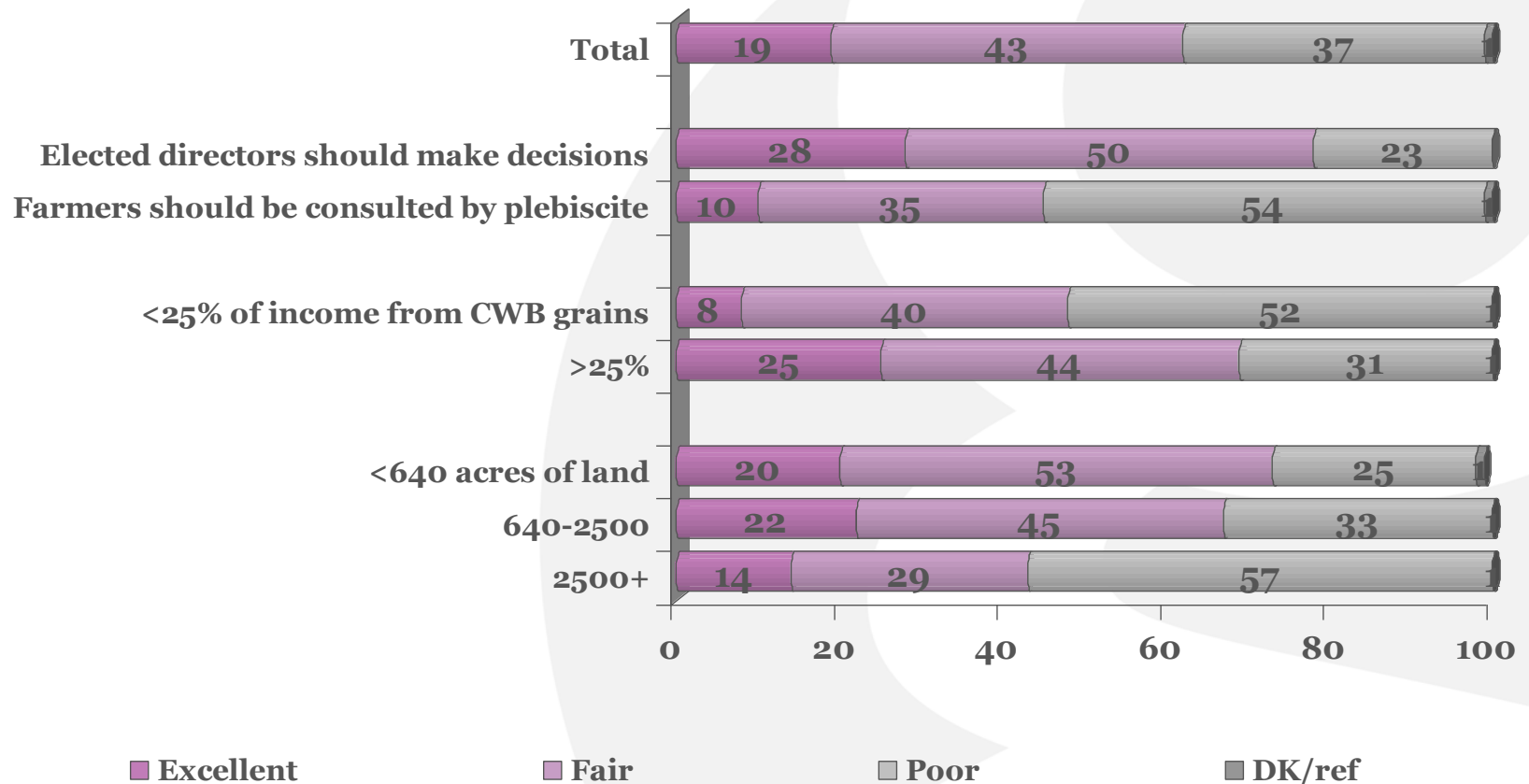
# Should Directors Make Decisions on Behalf of Farmers?

“Some/other people say that the elected directors on the CWB board represent farmers and make decisions at the CWB on behalf of farmers. Other/some people say that farmers should always be consulted directly by plebiscite when the CWB is making an important decision. Which of those is closer to your own view? Do you feel that way strongly or just somewhat?”





“How would you rate the CWB on being open and transparent with farmers about its operations?”



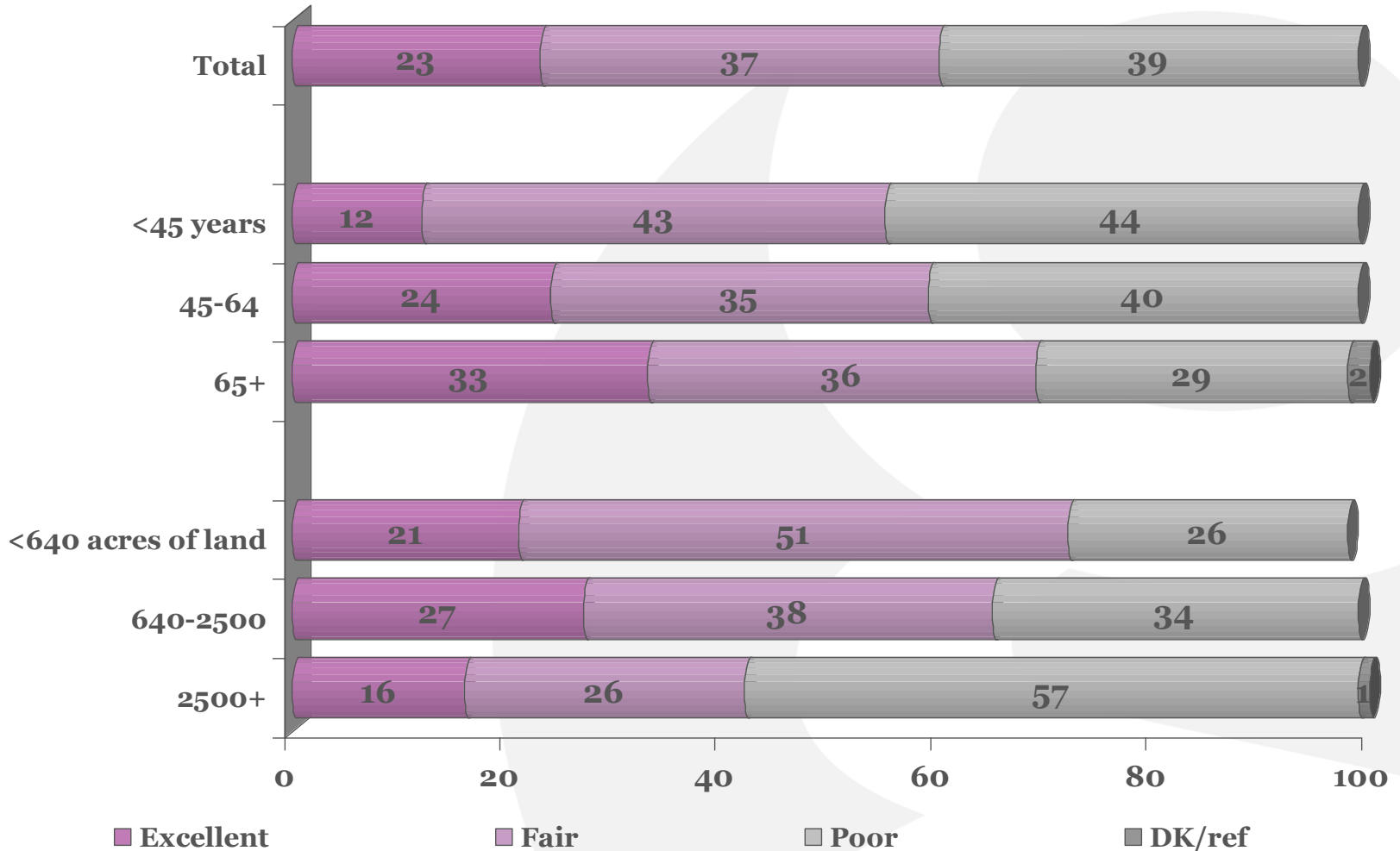


“How would you rate the CWB on being honest in its communication with farmers?”





“How would you rate the CWB on being accountable to Canadian farmers for its actions?”

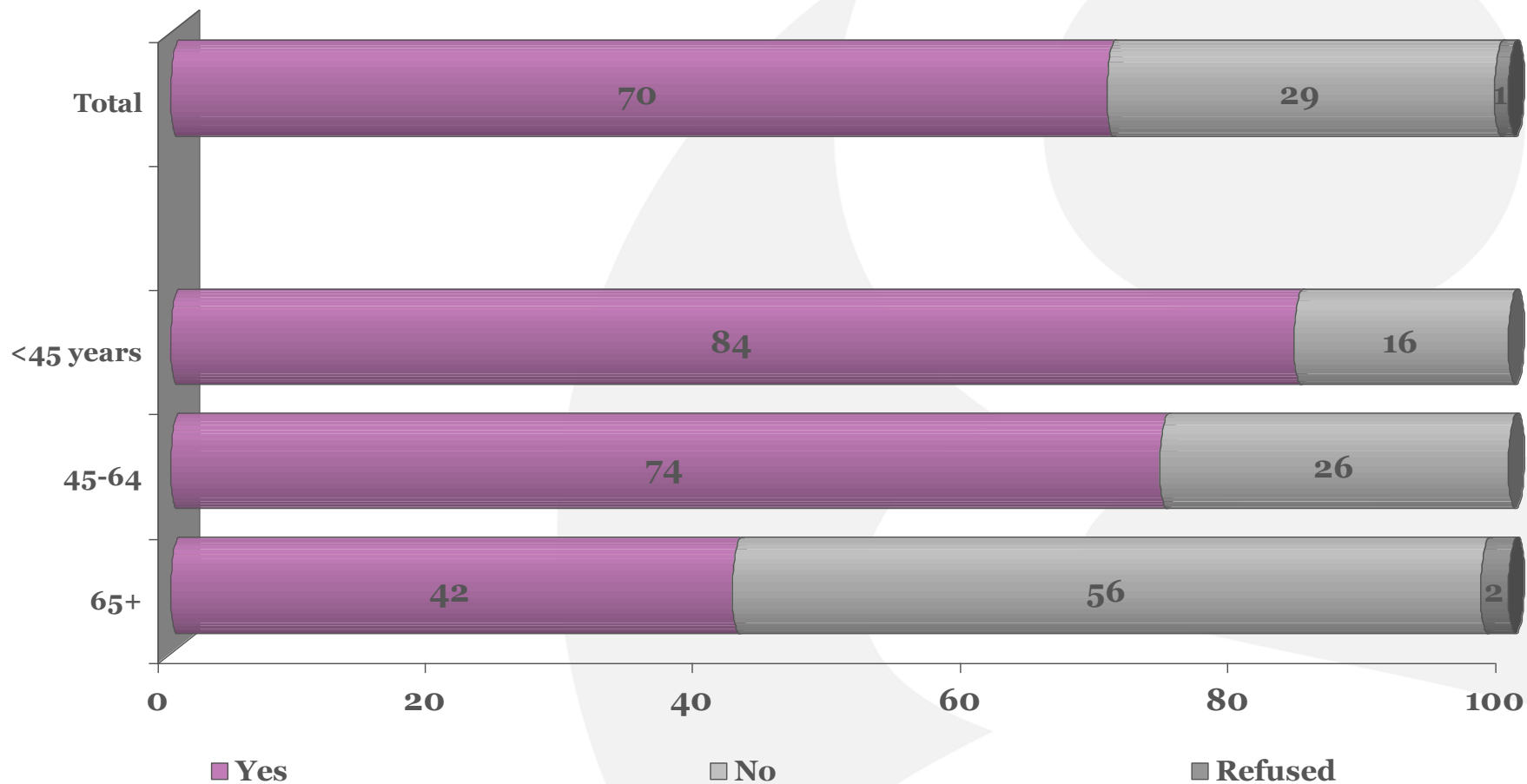




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# Do Producers Have High Speed Internet?

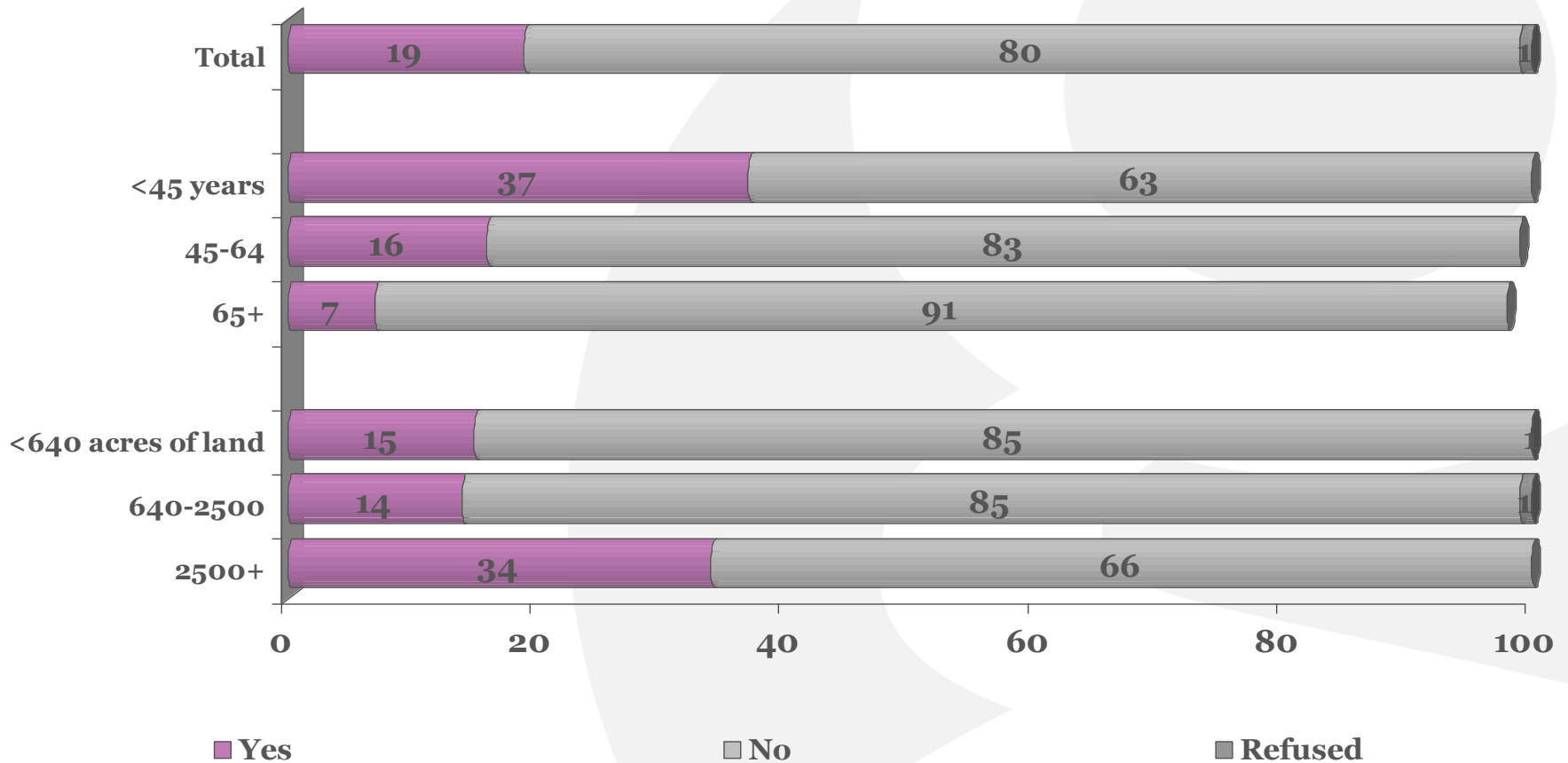
“Do you have a high speed internet connection?”





# Do Producers Have Smart Phones?

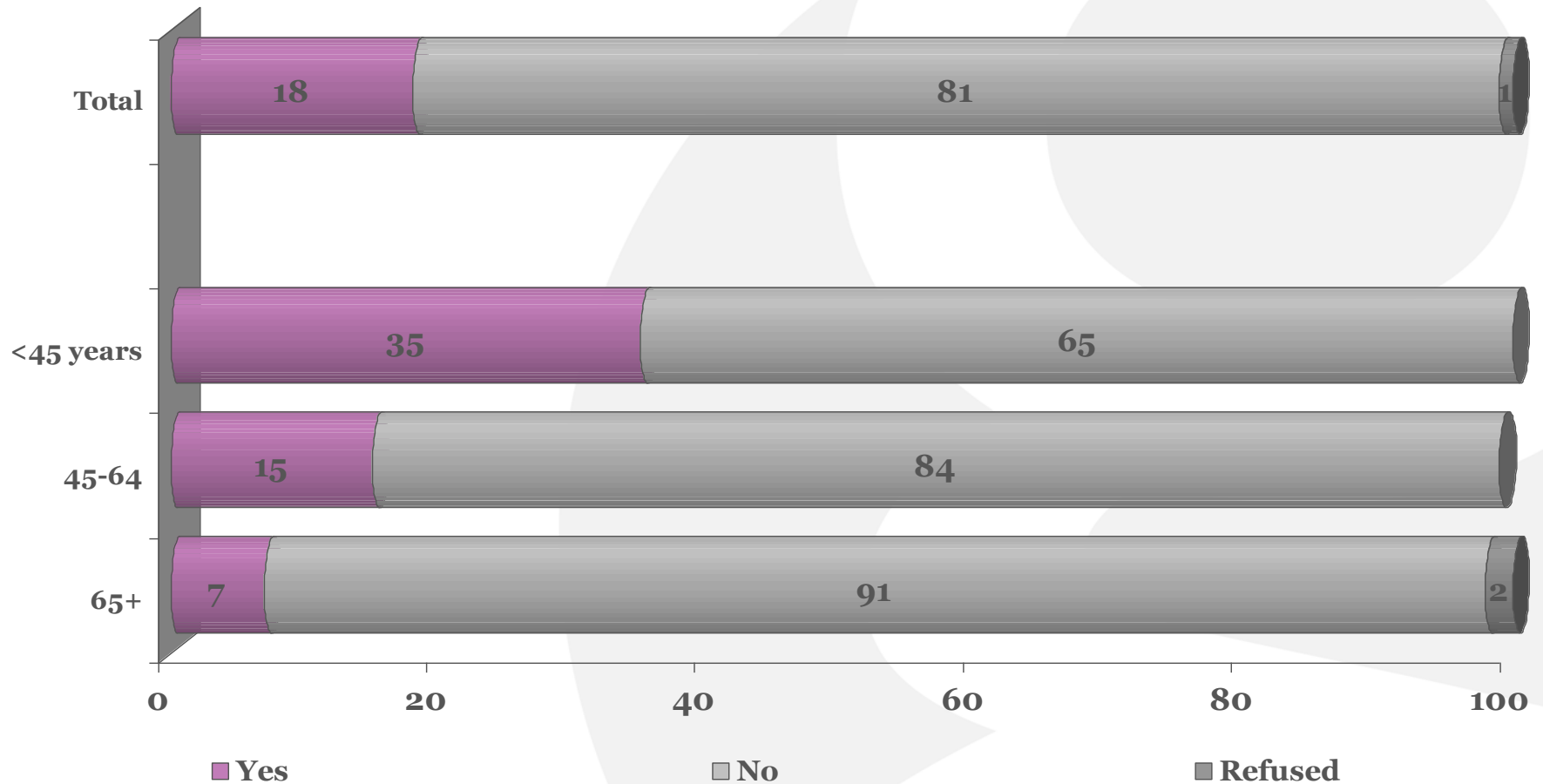
“Do you have a smart phone, such as a Blackberry or iPhone?”





# Are Producers on Facebook?

“Are you member of Facebook?”





# Occupations of Producers

“Which of the following three titles best describes what you do for a living?”

