

WESTERN GRAINS RESEARCH FOUNDATION

Producer Survey

May 2012



Report compiled by
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Western Grains Research Foundation Producer Survey

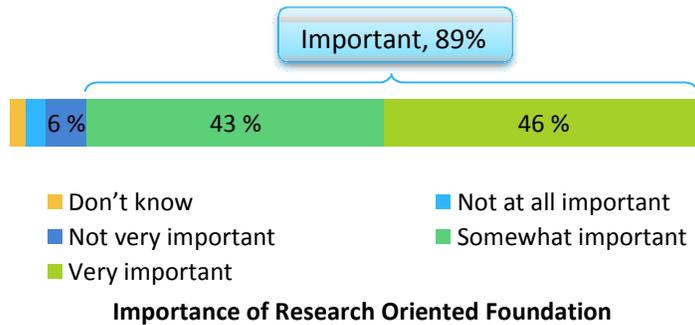
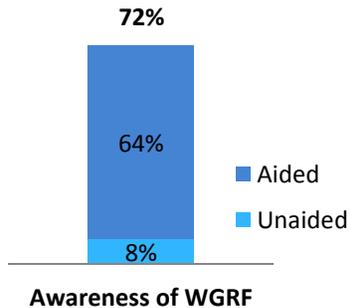
Executive Summary

Purpose and Methodology

The Western Grains Research Foundation (WGRF) contracted Insightrix Research Inc. to conduct a telephone survey of 600 wheat and barley producers in Manitoba, Saskatchewan, Alberta and British Columbia in March 2012 to gauge producer's awareness, understanding and opinions regarding WGRF, the wheat and barley check-offs and research.

Strong Support for Producer Directed Research

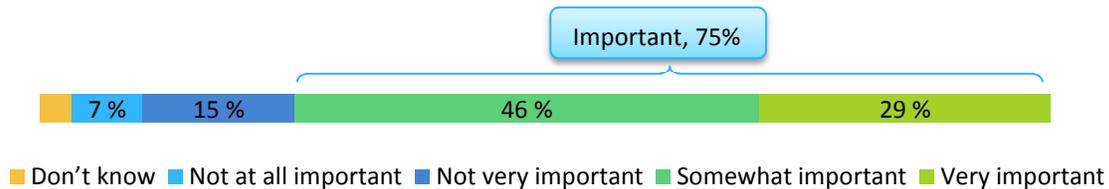
- While familiarity with the Foundation varies, 72% of wheat and barley farmers are aware of WGRF when prompted with the name.
- Nine in ten (89%) producers believe it is important to have a research oriented organization like WGRF. Producers generally have a positive perception of WGRF and highly value farmer directed agricultural research.



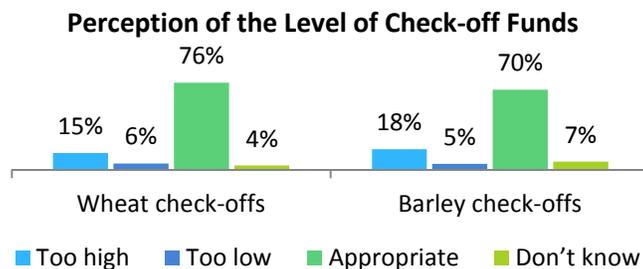
Check-off Funds Important to Producers

Three quarters (75%) of respondents believe the wheat and barley check-off funds are important to producers for variety research.

Importance of Wheat and Barley Check-off Funds

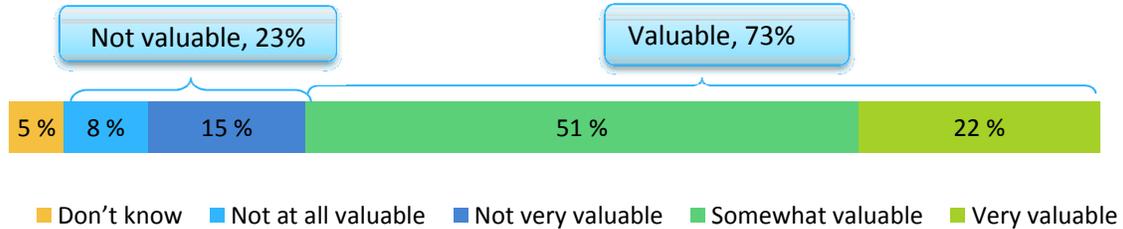


76% of respondents feel the current wheat check-off rates are appropriate, and 70% believe so on barley check-offs rates



WGRF Check-off Funds Deliver Value

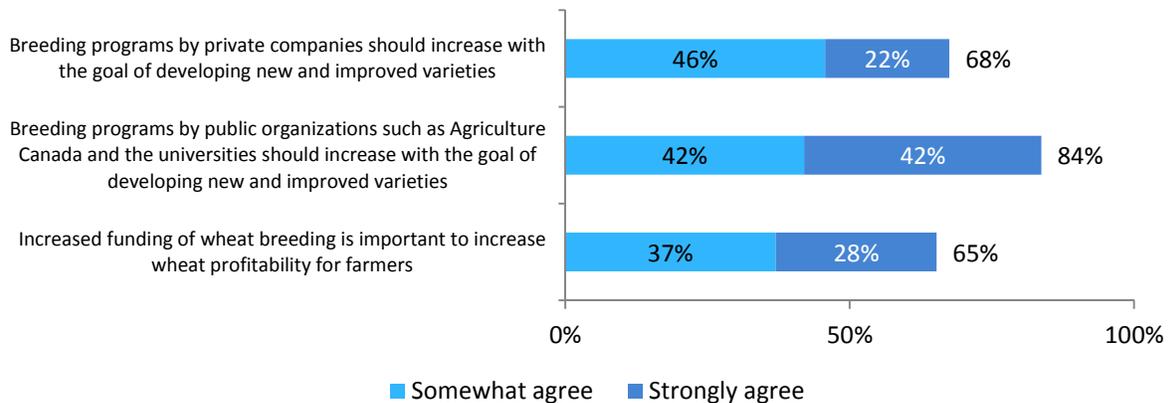
When asked to rate the value received from the wheat and barley check-offs they contribute to WGRF for variety research, 73% of respondents rate the check-offs as valuable.



Value Received from Check-off Funds

Producers Support Increase in Wheat Breeding

65% of producers surveyed agree that increased funding of wheat breeding is important to increasing wheat profitability for farmers. There is strong support for increased public wheat breeding (84%) and private wheat breeding (68%).



Producer Research Priorities

Although there is a high degree of satisfaction with current wheat (85%) and barley (84%) varieties, producers' top research priorities for WGRF include disease (33%) and pest resistance/management (12%), and the development of higher yielding varieties (28%).

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Introduction and Methodology

GOALS AND OBJECTIVES

The Western Grains Research Foundation (WGRF) was interested in conducting a quantitative survey of wheat and barley farmers in Manitoba, Saskatchewan, Alberta and British Columbia to assess producer's awareness and usage of the WGRF. Specific objectives of the survey include:

- Understand the value and perceptions of research among wheat and barley farmers
- Measure awareness of WGRF
- Understand perceptions of WGRF
- Characterize how wheat and barley fit into the crop mix

METHODOLOGY

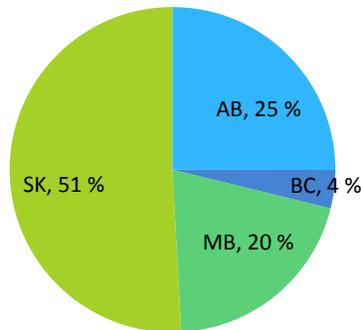
To achieve the research objectives WGRF contracted Inshtrix Research Inc. to conduct a telephone survey of wheat and barley farmers in the four aforementioned provinces.

Questionnaire

Inshtrix was responsible for developing the survey instrument with input from WGRF. Inshtrix worked closely with WGRF throughout the instrument design phase to finalize the questionnaire by ensuring proper wording and flow of survey questions, and suggesting survey improvements for data collection. The questionnaire used in the study was approved by WGRF in the final review and the survey was programmed into an online computer assisted telephone interviewing (CATI) system.

Sampling

Wheat and barley producers in the three prairie provinces and BC were targeted using a random sample purchased from ASDE, a reputable sample vendor. Farmers who did not grow wheat and barley in the past three years were screened out during the data collection. Regional quotas were established at the provincial level and the sample was established to be representative of the distribution of wheat and barley farmers in the four provinces. The following chart displays the regional distribution of respondents.



Base: All respondents, n=600.

Quantitative data collection

Results were collected between March 5th and March 30th, 2012. A total of 600 farmers completed the survey by telephone, with a break down as follows regarding data collection.

	Total	Total %
A. Complete	600	7.3%
B. Incomplete	85	1.0%
C. Screened Out	31	0.4%
D. Quota full	7	0.1%
E. Interviews not started	3,655	44.7%
F. Total contacted sample	8,170	100.0%
Participation rate = A/(F-D-C)		7.4%

The margin of error is equal to ± 3.99 percentage points, 19 times out of 20. The margin of error within subgroups (e.g. Alberta farmers) will be larger.

Reporting

The results of the study have been analyzed by appropriate demographic variables such as regions, crops grown, acres farmed, years farming, etc. Statistically significant findings are included where appropriate. A standard alpha value of less than 0.05 is considered statistically significant. This means that there is less than a 5% chance that the results would have occurred by chance.

Reporting Notes

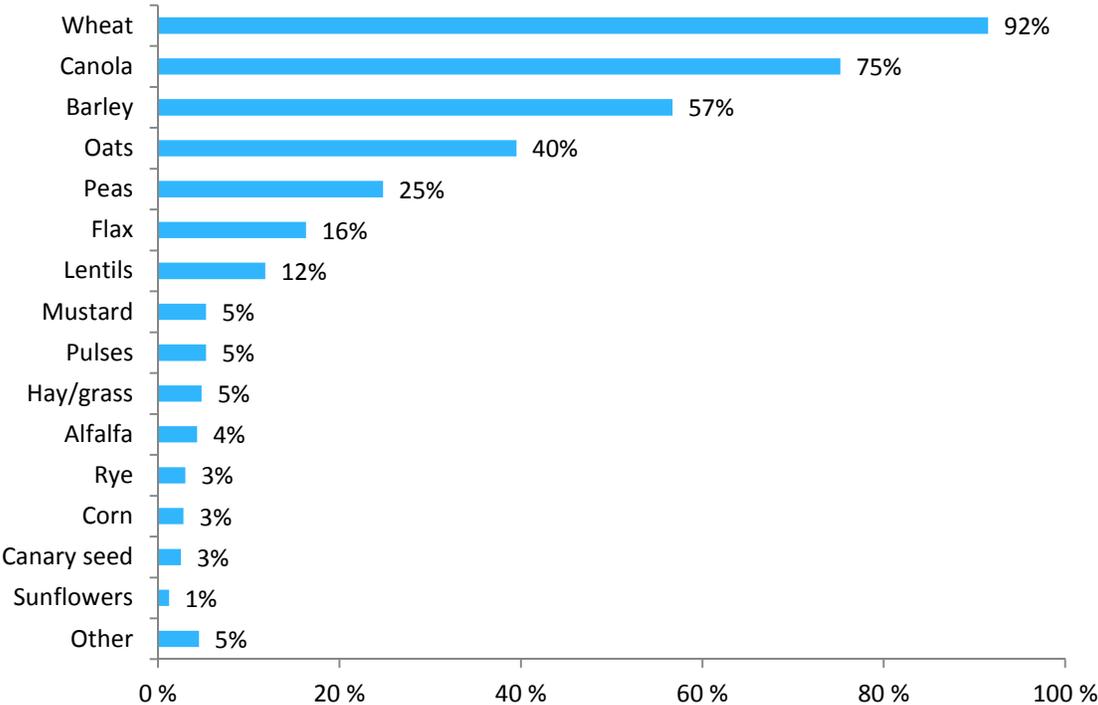
- Statistically significant differences between results that have been compared are denoted with a ▼ or ▲.
- All figures are rounded to one decimal place, so percentages may not sum to 100% due to rounding.
- Results for questions with multiple allowed responses will total more than 100%, as respondents are able to choose more than one option.
- Each question includes a base description detailing the number of respondents who answered each question (n=#).
- Open-ended questions have been themed and coded into categories. The percentages from individual codes will add to more than the 100% as comments from each respondent could be relevant to more than one code.
- An appendix to this report has also been provided and will include verbatim responses to all open-ended questions as well as all 'other' comments where respondents were asked to specify.

Study Results

CROPS PRODUCTION

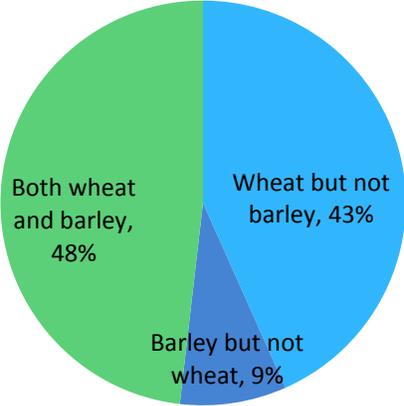
Crops Grown Within Past Three Years

First, producers were asked what crops they have grown in their farm within the past three years. As the study focused exclusively on wheat and barley producers, farmers who did not indicate growing wheat and/or barley were excluded from participating in the study. A majority of respondents grow wheat (92%), Canola (75%), and Barley (57%). Other common crops grown include oats (40%), peas (25%), flax (16%), and lentils (12%).



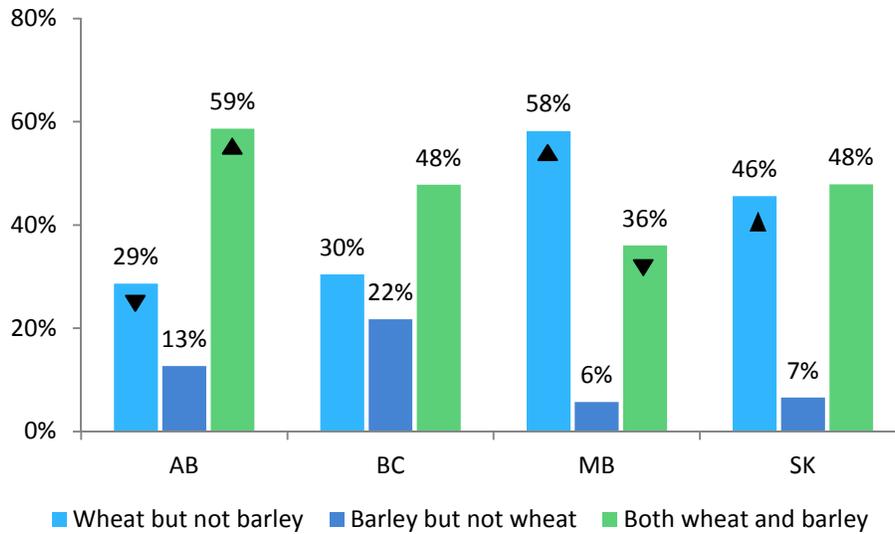
3. What crops have you grown in your farm within the past 3 years? Base: All respondents, n=600. Multiple responses possible.

Specifically looking at wheat and barley production, only one in ten (9%) respondents grow barley but not wheat. Over four in ten (43%) grow wheat but not barley, and nearly one half (48%) of respondents grow both wheat and barley.



3. What crops have you grown in your farm within the past 3 years? Base: All respondents, n=600.

As to be expected, crop production varies across provinces. Farmers in Manitoba (58%) and Saskatchewan (46%) are more likely to grow wheat but not barley compared to those in Alberta (29%). Conversely, there are more producers in Alberta (59%) who grow both wheat and barley compared to Manitoba (36%).

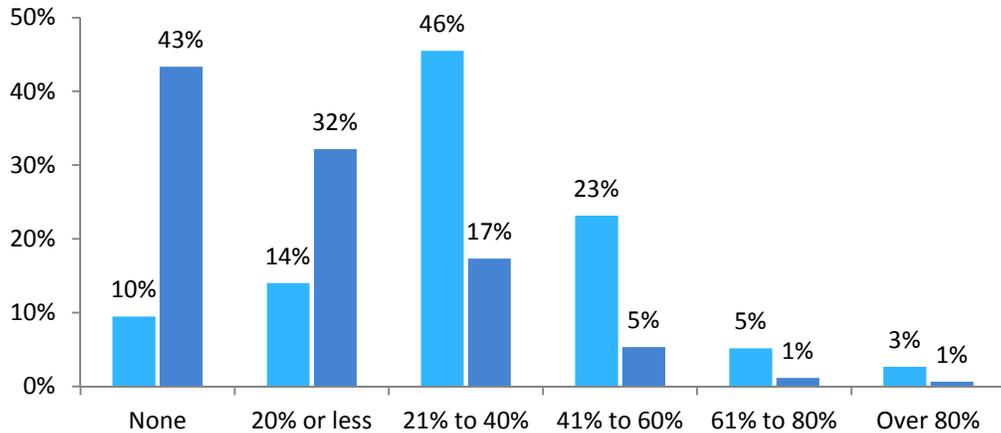


3. What crops have you grown in your farm within the past 3 years? Base: All respondents, n=150 (AB), n=23 (BC), n=122 (MB), n=305 (SK). Multiple responses possible. Caution is recommended in interpreting BC results due to the small sample size (n=23).

Acres Farmed of Wheat and Barley

When asked to specify what percentage of their total farming acres is dedicated to wheat and barley based on an average of the last three years, one in ten (10%) respondents indicate not growing wheat compared to over four in ten (43%) who did not grow barley.

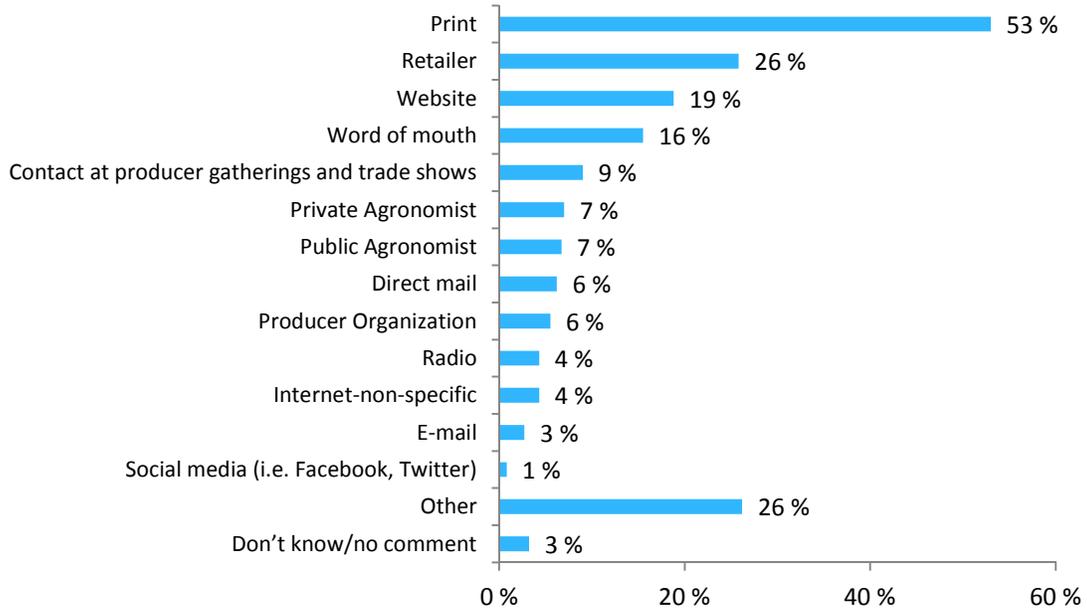
On average, 35% of acres farmed by all respondents are dedicated to wheat production, and 14% to barley.



4. Based on an average of the last three years, what percentage of your total farming acres is dedicated to? Base: All respondents, n=600.

Source of Production Information

All respondents were asked to identify their most important sources of production information and the following chart outlines the results for all 600 respondents. One half (53%) of respondents reference print as their most important source of information, followed by their retailer (26%), websites (19%), and word of mouth (16%).



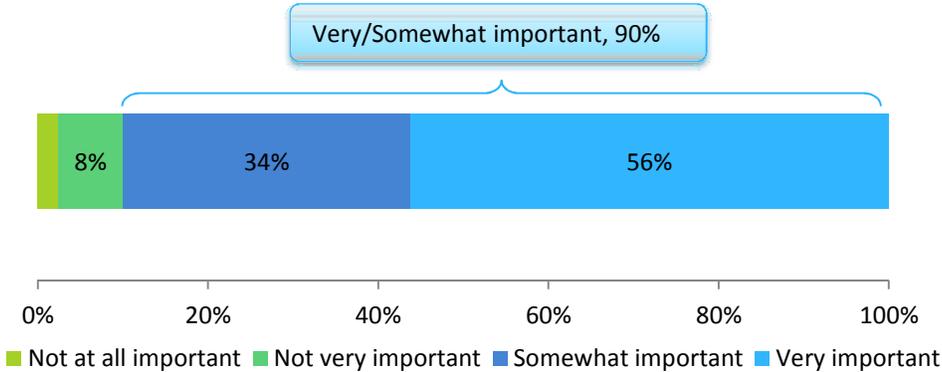
29. What are your most important sources of production information? Base: All respondents, n=600. Multiple responses possible.

Wheat Production

Respondents who have grown wheat within the past three years were asked a series of questions specifically about their wheat production, including the importance of wheat in their farming operation and their expectations for growing wheat in the near future.

Importance of Wheat in Crop Rotation

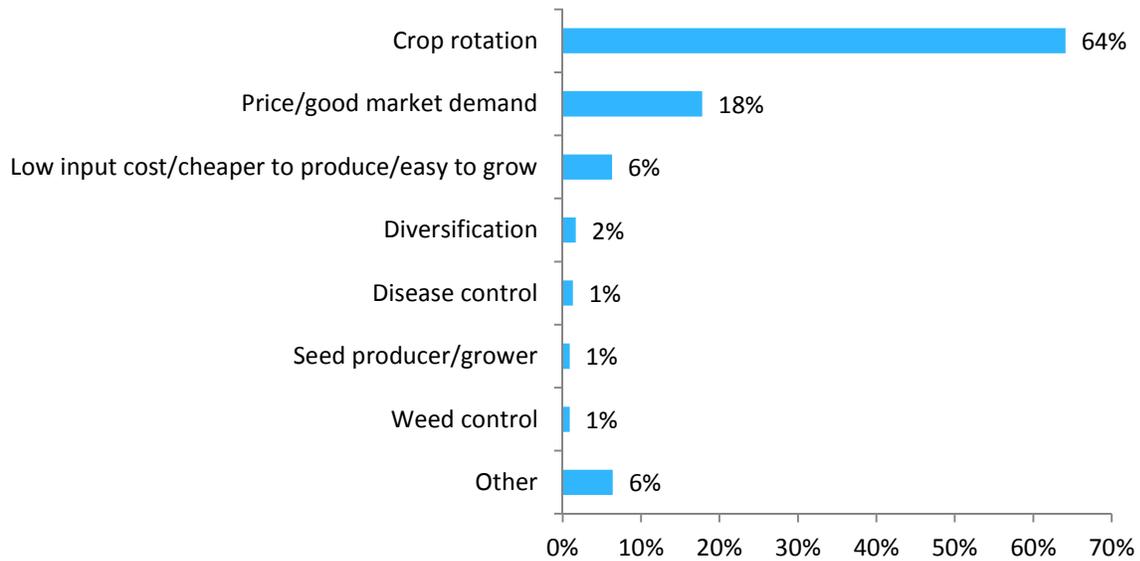
Respondents who have grown wheat within the past three years were asked how important wheat is in their crop rotation. Nine in ten producers (90%) report wheat being very important (56%) or somewhat important (34%) in their crop rotation.



5. How important is wheat in your crop rotation? Base: Respondents who grow wheat within the past three years, n=543.

Primary Reason for Planting Wheat

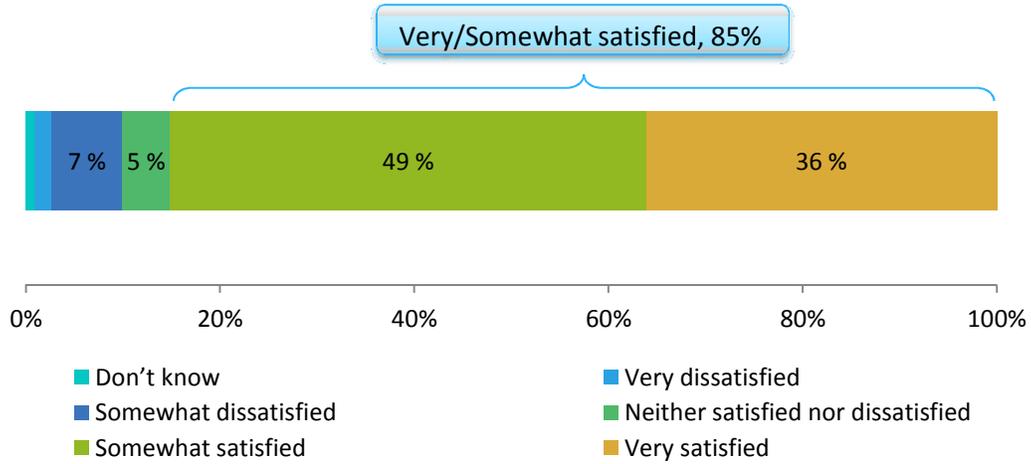
Among the primary reasons for planting wheat, two thirds (64%) indicate that crop rotation is the primary reason. Price/good market demand is a primary reason for planting for two in ten (18%) wheat growers, while other reasons were referenced by less than one in ten.



6. What is the primary reason you planted wheat within the past 3 years? Base: Respondents who grow wheat within the past three years, n=543.

Satisfaction with Wheat Varieties

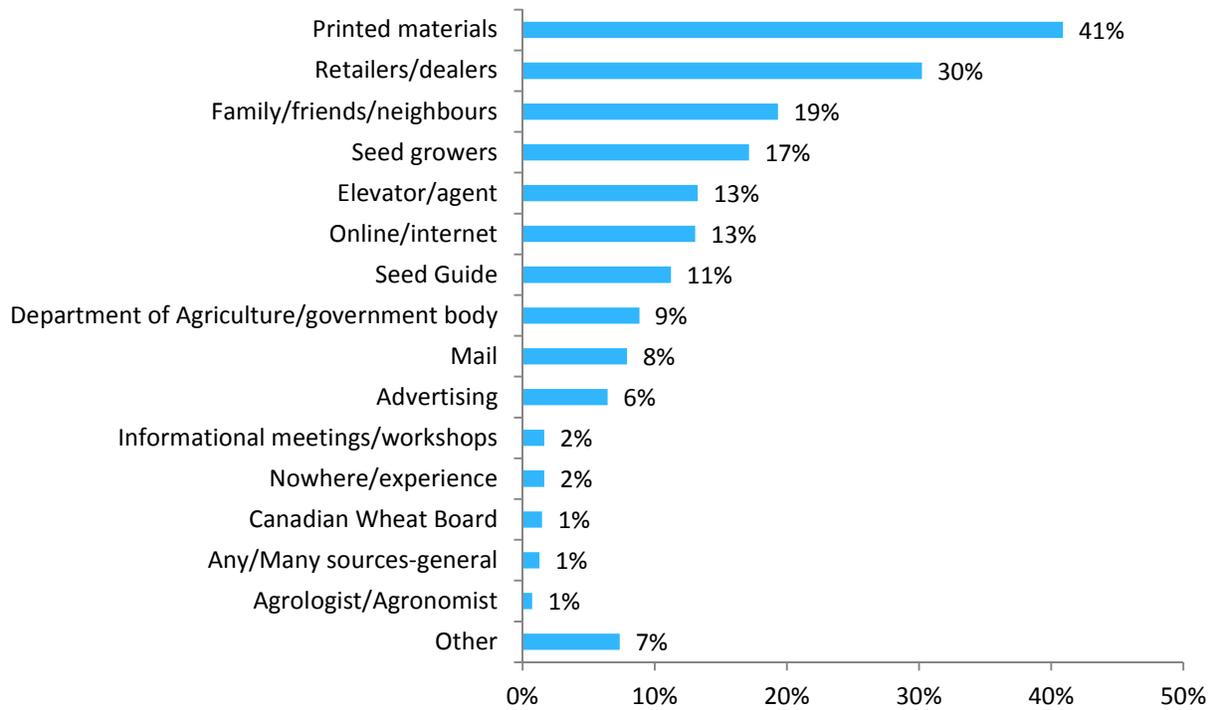
Overall, wheat growers indicate a fairly high degree of satisfaction with the number of wheat varieties available to them. Over one third (36%) are very satisfied, while an additional one half (49%) of wheat farmers are somewhat satisfied.



9. How satisfied are you with the current number of wheat varieties available to you? Base: Respondents who grow wheat within the past three years, n=543.

Source of Information on Wheat Varieties

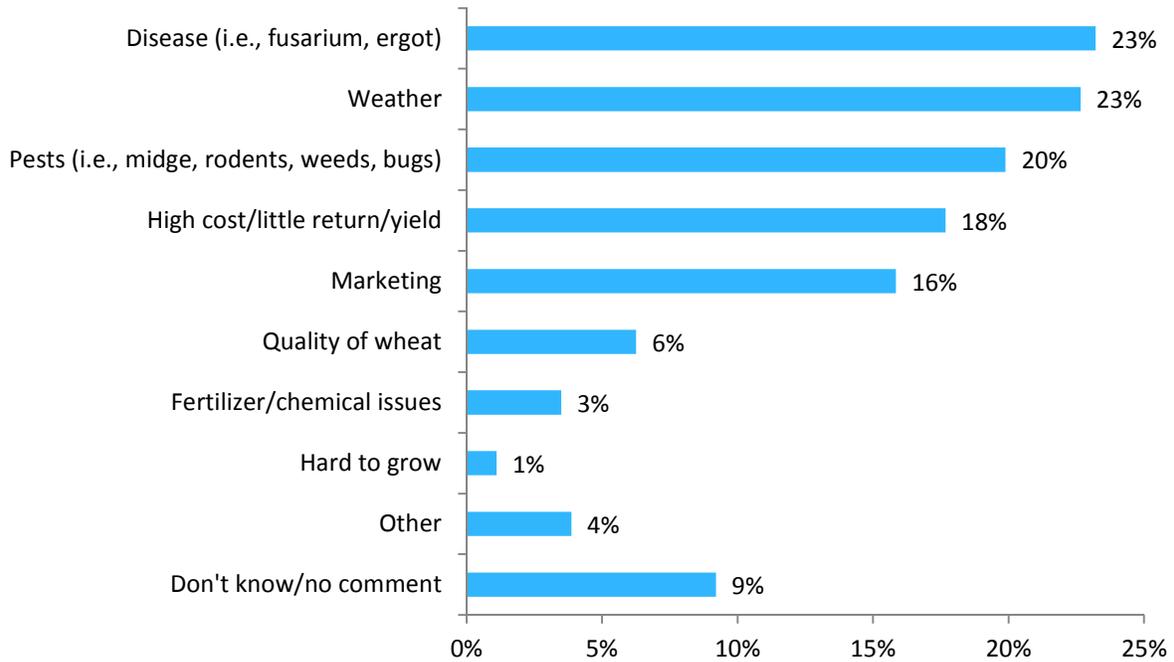
Next, wheat producers were asked to identify where they currently receive information on wheat varieties. With multiple responses possible, four in ten (41%) respondents receive information from printed materials. Other top sources include: retailers/dealers (30%), family/friends/neighbours (19%), and seed growers (17%). A full list of verbatim responses is contained in the appendix.



10. Where do you currently receive your information on wheat varieties? Base: Respondents who grow wheat within the past three years, n=543. Multiple responses possible.

Number One Production Issue Faced

Respondents who have grown wheat within the past three years were subsequently asked the number one wheat related production issue they face as producers. Nearly one quarter report disease (23%) and weather (23%) as being the number one issues they face. Other common issues include pests (20%), cost, return and yield comments (18%), and marketing (16%). A full list of verbatim responses is contained in the appendix.



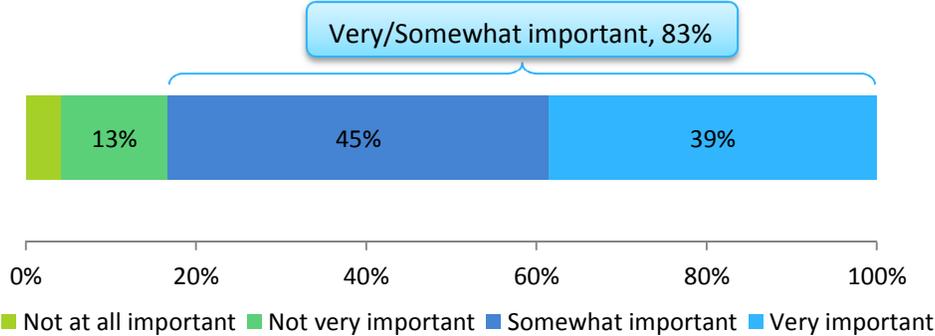
15. What is the number one wheat related production issue you as a producer face? Base: Respondents who grow wheat within the past three years, n=543. Multiple responses possible.

Barley Production

Similar to respondents who have grown wheat within the past three years, those who have grown barley were asked to describe their barley production.

Importance of Barley in Crop Rotation

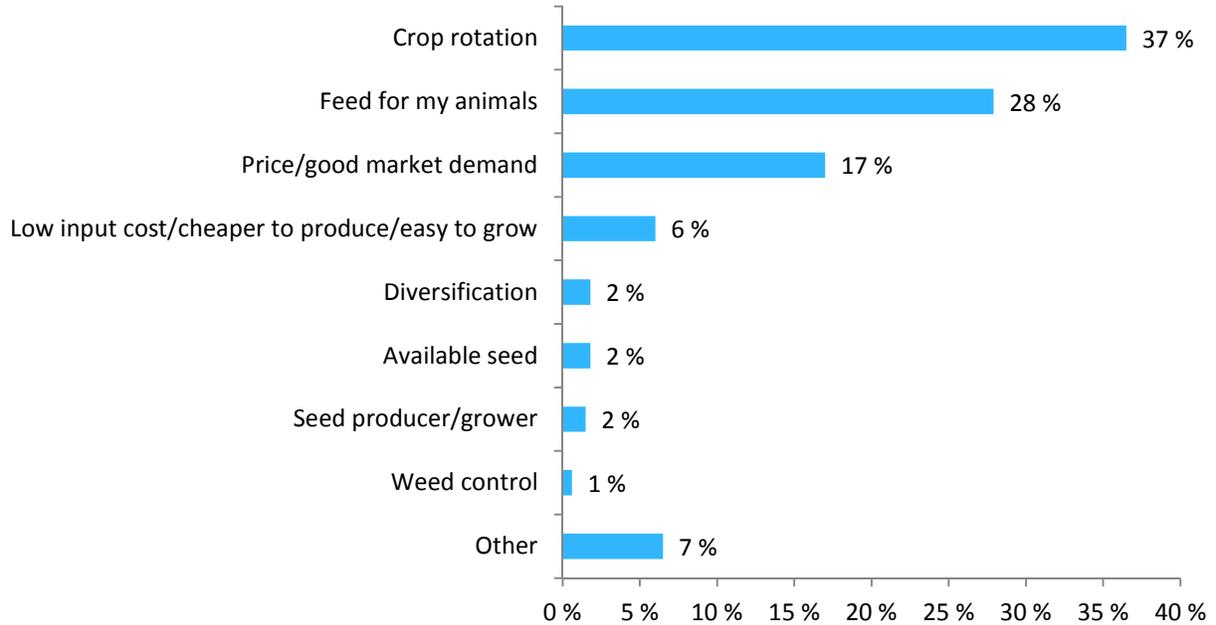
Respondents who have grown barley within the past three years were asked how important barley is in their crop rotation. Similar to wheat farmers, a majority (83%) of barley farmers indicate barley is at least somewhat important in their crop rotation. In particular, four in ten (39%) feel it is very important, while about one half (45%) feel it is somewhat important.



7. How important is barley in your crop rotation? Base: Respondents who grow barley within the past three years, n=340.

Primary Reason for Planting Barley

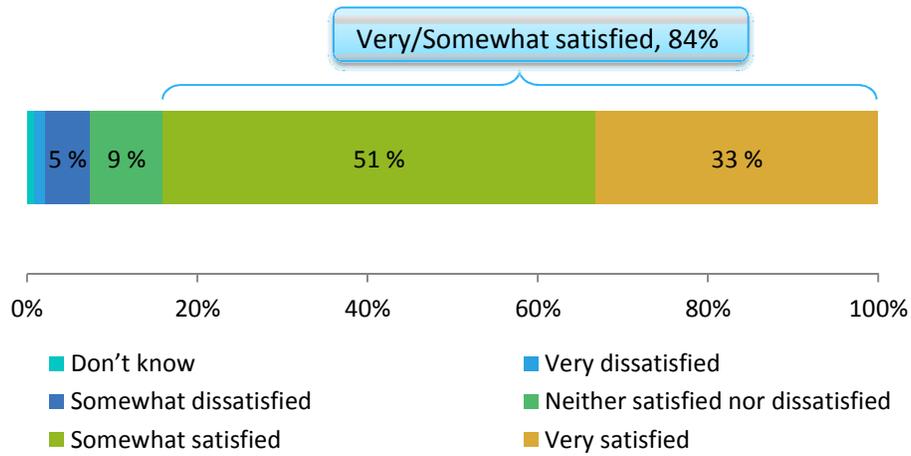
When asked about primary reason of planting barley, the top three selections are crop rotation (37%), feed for animals (28%), and price/good market demand (17%). Other reasons for planting barley were referenced by less than one in ten producers.



8. What is the primary reason you planted barley within the past 3 years? Base: Respondents who have grown barley within the past three years, n=340.

Satisfaction with Barley Varieties

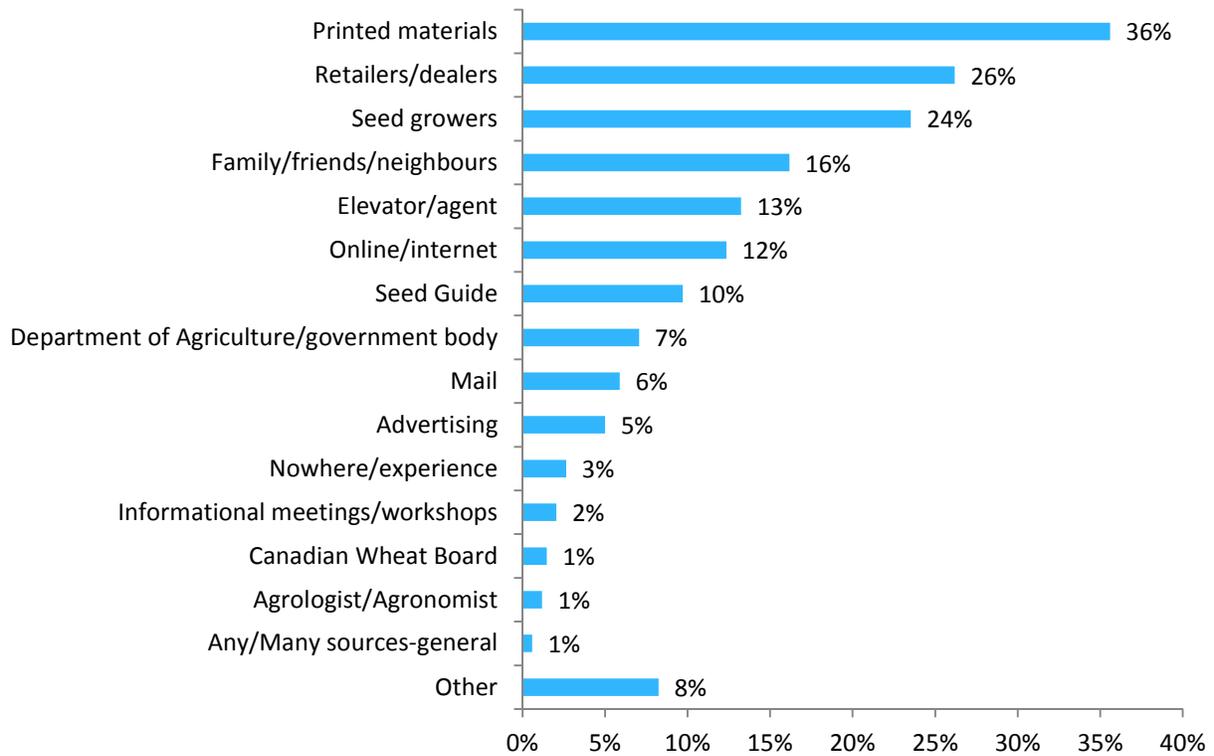
Barley producers were also asked how satisfied they are with the current number of barley varieties available. A strong majority are very (33%) or somewhat (51%) satisfied. One in ten (9%) are neither satisfied nor dissatisfied.



12. How satisfied are you with the current number of barley varieties available to you? Base: Respondents who grow barley within the past three years, n=340.

Source of Information on Barley Varieties

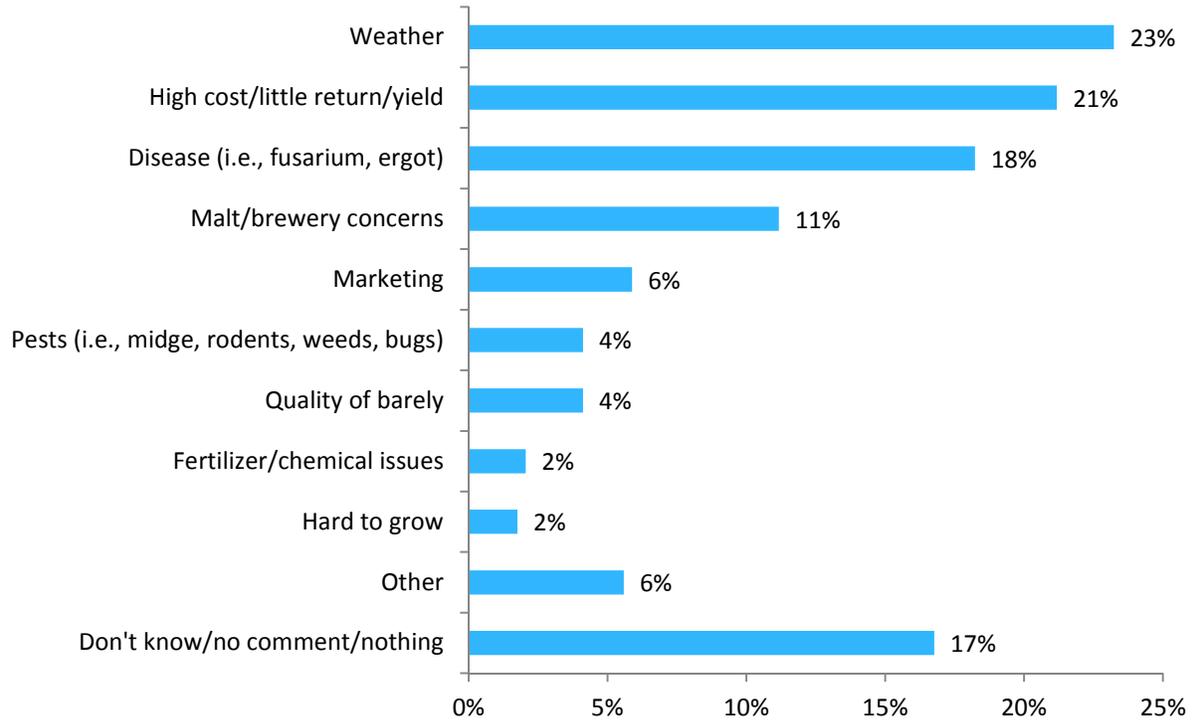
Barley producers were then asked where they currently receive information on barley varieties. While no single source of information on barley varieties is referenced by a majority of barley farmers, over one third (36%) reference printed materials and one quarter (26%) receive their information from retailers/dealers and seed growers (24%). A full list of verbatim responses is contained in the appendix.



13. Where do you currently receive your information on barley varieties? Base: Respondents who grow barley within the past three years, n=340. Multiple responses possible.

Number One Production Issue Faced

When asked about the number one barley related production issue producers face, nearly one quarter (23%) of respondents who have grown barley within the past three years cite weather to be the number one issue, followed by cost, return and yield issues (21%), and disease (18%). A full list of verbatim responses is contained in the appendix.

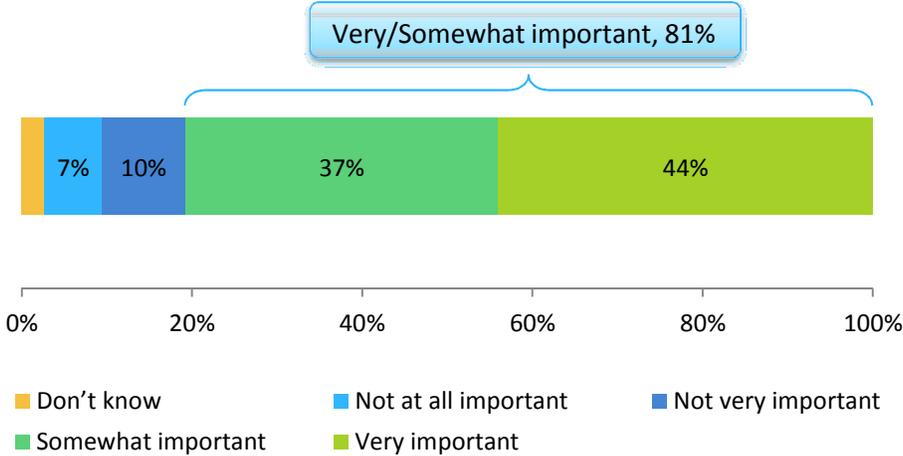


16. What is the number one barley related production issue you as a producer face? Base: Respondents who grow barley within the past three years, n=340. Multiple responses possible.

Importance of Wheat and Barley in Future Crop Rotation

Importance of Wheat in Future Crop Rotation

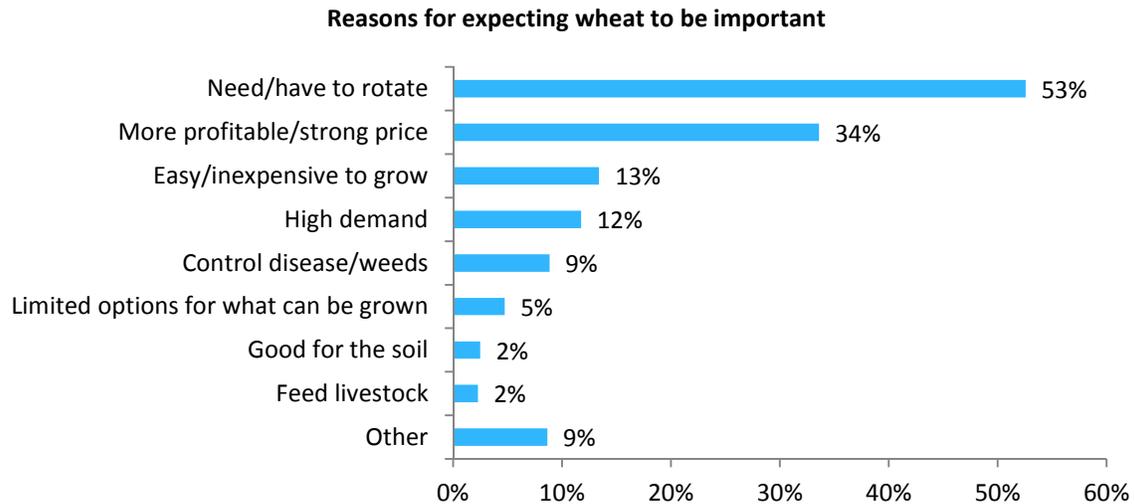
On the topic of importance of wheat in future crop rotation, eight in ten (81%) respondents expect wheat to be very (44%) or somewhat (37%) important in their crop rotation in the next three years.



11. How important do you expect wheat to be in your crop rotation in the next 3 years? Base: All respondents, n=600.

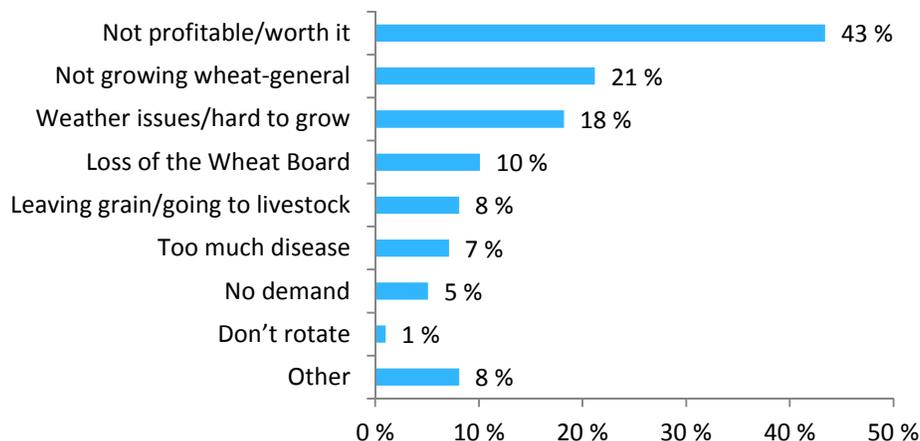
Reasons for Expectation

Respondents were then asked the reasons for their specific expectation. Those who expect wheat to be either somewhat or very important in their crop rotation in the next three years indicate needing or having to rotate their crops (53%), wheat being more profitable or having a strong price (34%), easiness to grow (13%) and high demand (12%) as the top reasons.



11a. Why do you expect wheat to be very/somewhat important in your crop rotation in the future? Base: Respondents who expect wheat to be very or somewhat important in their crop rotation in the next three years, n=485. Multiple responses possible.

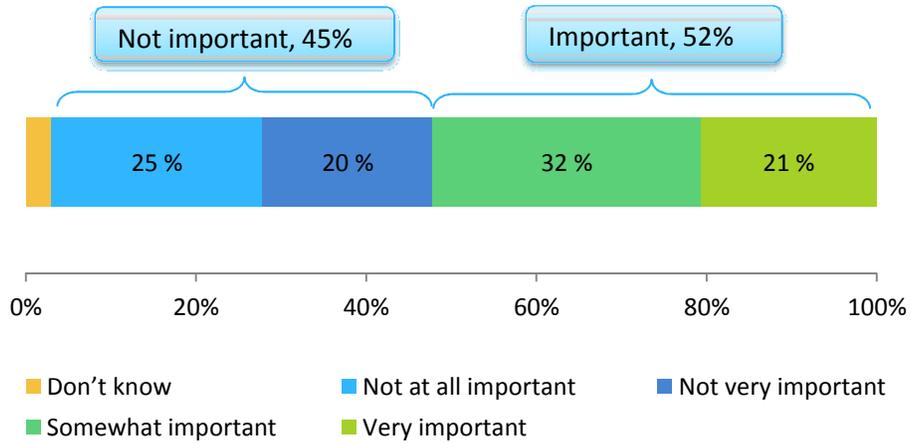
Among those who expect wheat not to be important in their crop rotation in the next three years, four in ten (43%) expect that wheat is not profitable or not worth it. Two in ten are simply not going to grow wheat (21%) or cite weather issues or wheat being hard to grow (18%) as the top reasons. A full list of verbatim responses is contained in the appendix.



11b. Why do you expect wheat to be not very/not at all important in your crop rotation in the future? Base: Respondents who expect wheat to be not very or not at all important in their crop rotation in the next three years, n=99. Multiple responses possible.

Importance of Barley in Future Crop Rotation

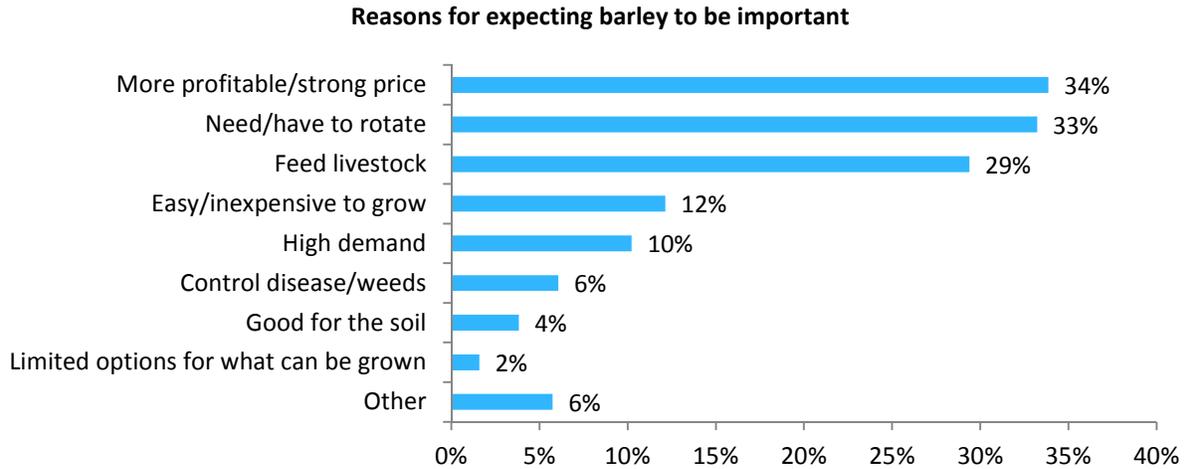
When asking barley farmers how important they expect barley to be in their crop rotation in the next three years, respondents were fairly split on their expectations. One half of respondents (52%) expect barley to be at least somewhat (32%) or very important (21%). Conversely, about one half (45%) expect barley to be not important, including one quarter of respondents (25%) who believe it will be not at all important to their crop rotation.



14. How important do you expect barley to be in your crop rotation in the next 3 years? Base: All respondents, n=600.

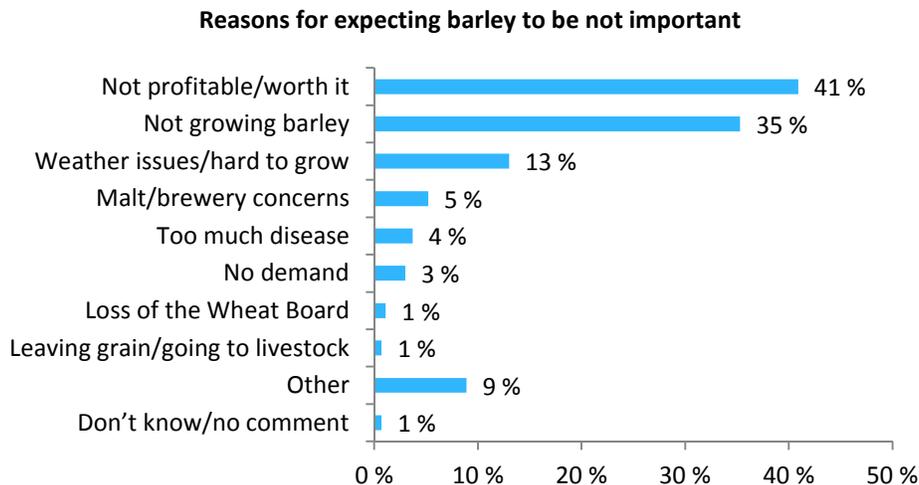
Reasons for Expectation

Barley farmers were then asked to describe the reasons for their specific expectations. Those who expect barley to be at least somewhat important in their crop rotation in the next three years cite barley being more profitable or having a strong price (34%), needing or having to rotate their crops (33%), and the need to feed livestock (29%) as the top reasons.



14a. Why do you expect barley to be [insert very/somewhat important] in your crop rotation in the future? Base: Respondents who expect barley to be very or somewhat important in their crop rotation in the next three years, n=313. Multiple responses possible.

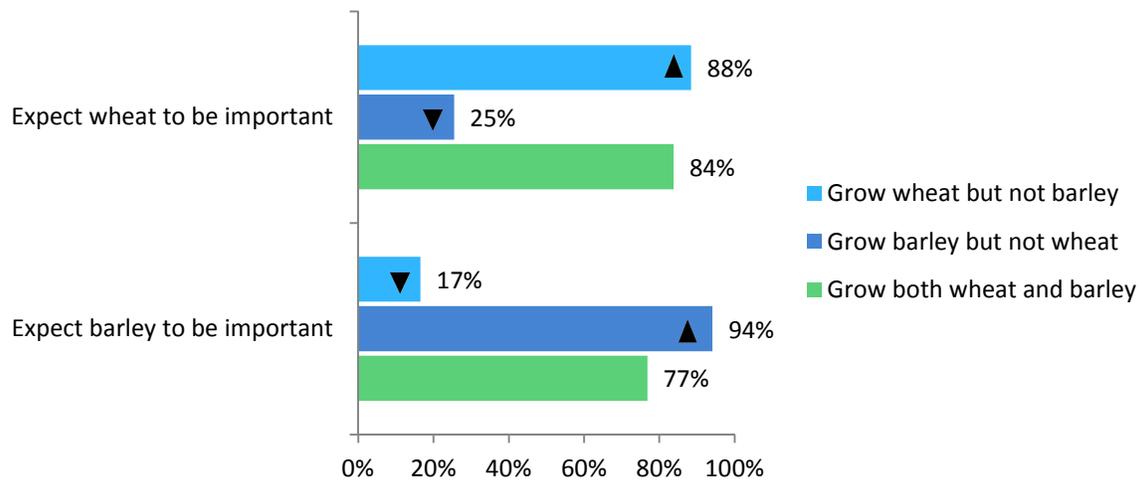
Among those who expect barley to be not important in their crop rotation in the next three years, four in ten (41%) believe that it will be not profitable or worth it. One third (35%) are not planning on growing barley while one in ten (13%) cite weather issues or that barley is hard to grow. A full list of verbatim responses is contained in the appendix.



14b. Why do you expect barley to be not very/not at all important in your crop rotation in the future? Base: Respondents who expect barley to be not very or not at all important in their crop rotation in the next three years, n=269. Multiple responses possible.

Comparisons of Importance of Wheat and Barley in Future Crop Rotation

Respondents' expectation of importance of wheat and barley in future crop rotation largely depends on the type of crops grown in the past. Among those who have grown wheat only in the past three years, nine in ten (88%) expect wheat to be important in their future crop rotation. Nineteen in twenty (94%) barley farmers who do not grow wheat expect barley to be either somewhat or very important in their crop rotation in the next three years. A majority of farmers who grow both wheat and barley expect that both will be important in the next three years. As expected, farmers who have grown wheat without barley in the past three years are significantly more likely to feel that wheat will be important in their future crop rotation. Similarly, farmers who have grown barley without wheat in the past three years are significantly more likely to expect barley to be important in the next three years.



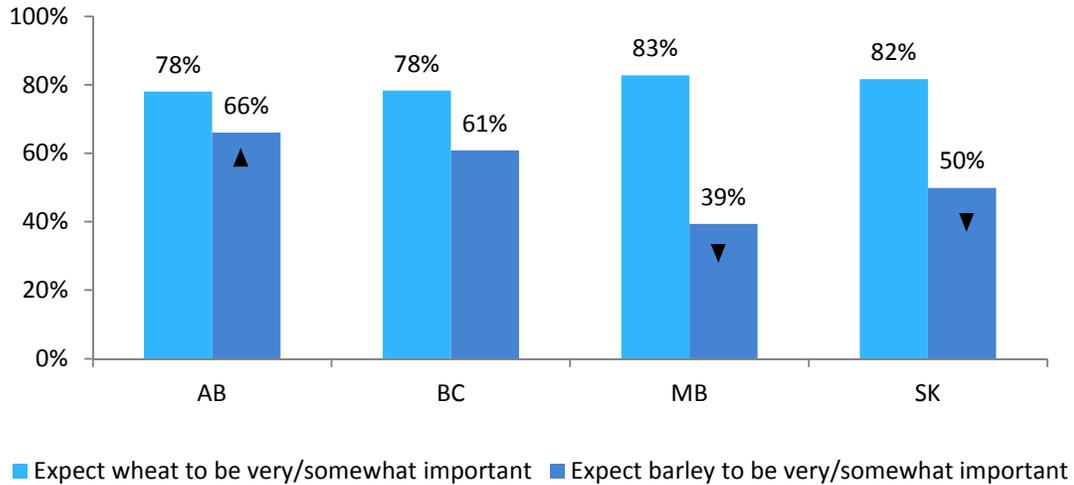
14. How important do you expect barley to be in your crop rotation in the next 3 years?

11. How important do you expect wheat to be in your crop rotation in the next 3 years?

Base: All respondents, n=260 (wheat but not barley), n=51 (barley but not wheat), n=289 (both wheat and barley).

Importance of Wheat and Barley in Future Crop Rotation – Province

Breaking down farmers' expectation of the importance of wheat and barley in their future crop rotation, farmers in Alberta (66%) are more likely to expect barley to be important in the short future compared to those in Manitoba (39%) and Saskatchewan (50%). No significant difference is noted in the importance of wheat in future crop rotation among the four provinces.



14. How important do you expect barley to be in your crop rotation in the next 3 years?

11. How important do you expect wheat to be in your crop rotation in the next 3 years?

Base: All respondents, n=150 (AB), n=23 (BC), n=122 (MB), n=305 (SK).

WESTERN GRAINS RESEARCH FOUNDATION PERCEPTIONS

Awareness of WGRF

Unaided Awareness

Respondents were asked whether they have heard of any organizations operating in western Canada that funds farmer directed agriculture research. Nearly four in ten (39%) claim they have heard of such organizations.

Those who have heard of organizations funding agriculture research were then asked to name the organizations. 46 respondents recall WGRF, which represent 8% of the total 600 respondents. A full list of verbatim responses can be referenced in Appendix A.

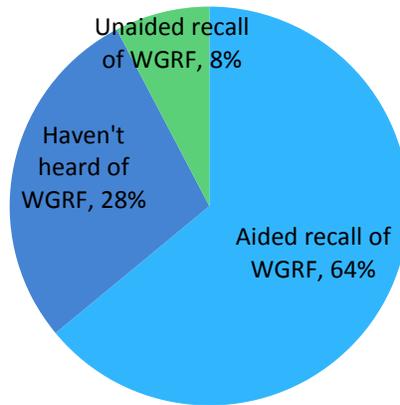
Have heard of such organizations	231	39%
WGRF	46	8%
University of Saskatchewan	12	2%
Canadian Wheat Board	8	1%
Alberta Barley	7	1%
Agriculture Canada	6	1%
BC Grains	5	1%
Secan	5	1%
Canadian Grains	4	1%
All other (specify)	103	17%
Don't know	74	12%
Haven't heard of such organizations	369	62%
Total	600	100%

17. Have you heard of any organizations operating in western Canada that funds farmer directed agricultural research? Base: All respondents, n=600.

18. What is the name of these organizations? Base: respondents who have heard of organizations operating in western Canada that funds farmer directed agricultural research, n=231. Multiple responses possible. Results are rebased to represent the percentage of the total 600 respondents.

Aided Awareness

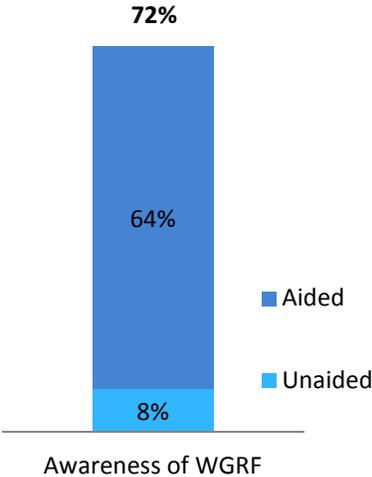
Those who were not able to recall WGRF on an unaided basis were then asked directly whether they have heard of WGRF. 384 out of the 554 respondents report having heard of the foundation before once prompted with the name of WGRF, accounting for 64% of the total 600 respondents.



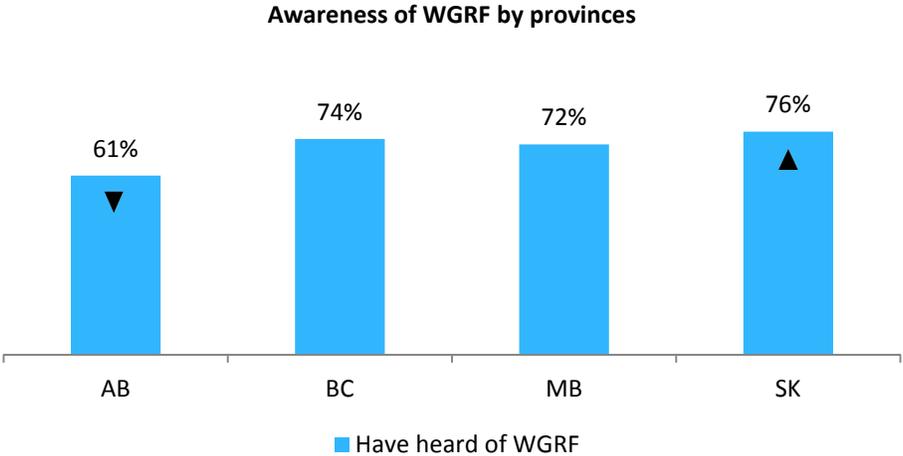
19. Have you ever heard of the Western Grains Research Foundation? Base: Respondents who were not aware of any organizations operation in western Canada that funds farmer directed agricultural research (Q17) and those who were aware but did not identify the name of WGRF (Q18), n=554. Results are rebased to represent the percentage of the total 600 respondents

Overall Awareness of WGRF

Combining unaided and aided awareness, a total of seven in ten (72%) of respondents are aware of WGRF (unaided: 8%, aided: 64%). Notably, there is no difference in the awareness of the foundation between wheat and barley producers.



Producers in Saskatchewan (76%) are more likely to be aware of the foundation than those in Alberta (61%).

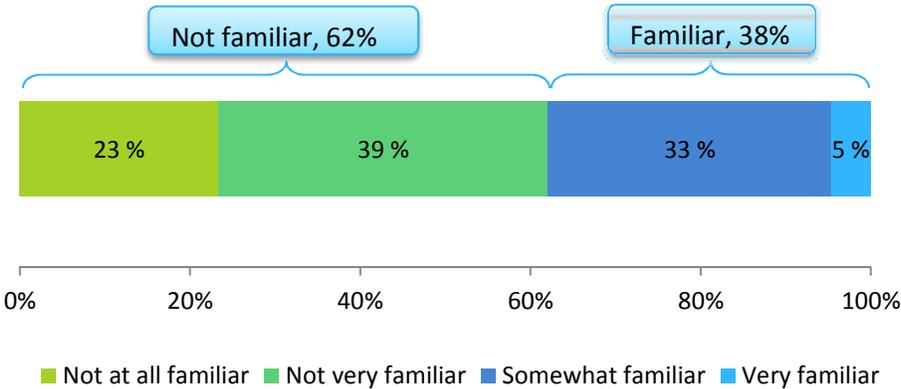


Familiarity with WGRF

All respondents were then provided a brief description of WGRF and its activities as noted below and asked how familiar they are with WGRF and its activities.

Western Grains Research Foundation (WGRF) is a farmer funded and directed non-profit organization investing primarily in wheat and barley variety development to benefit western Canadian producers. Through investments of over \$57 million WGRF has assisted in the development and release of more than 100 new wheat and barley varieties over the past decade and a half, many of which are today seeded to large portions of the cropland in Western Canada. WGRF also invests in research on other western Canadian crops through the Endowment fund. Since 1981 the Endowment Fund has supported a wealth of innovation across Western Canada providing over \$26 million in funding for over 230 research projects.

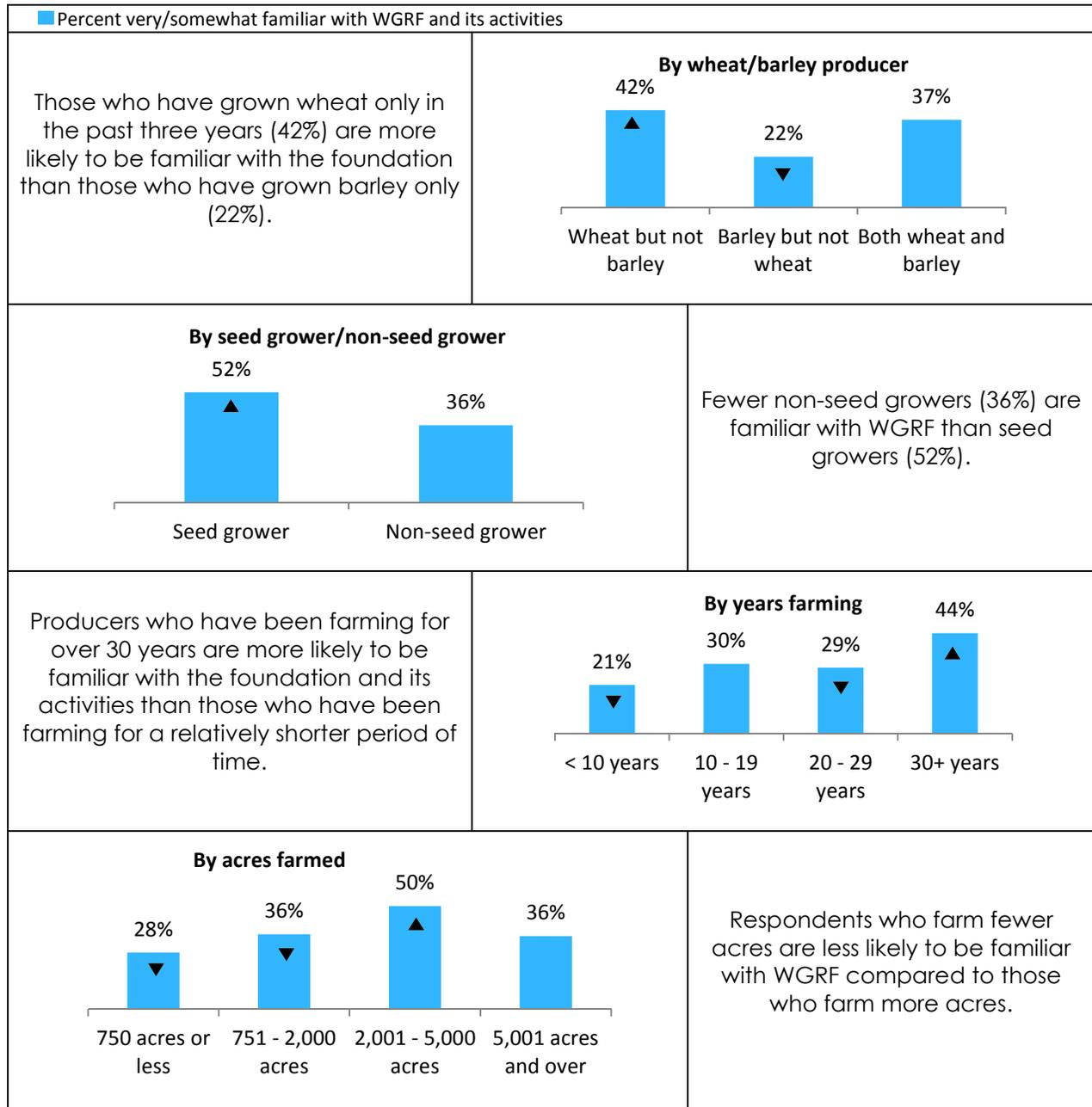
After hearing this description, a majority (62%) of respondents indicate they are not familiar with the foundation, including nearly one quarter (23%) who are not at all familiar. The balance (38%) is familiar with WGRF, with only 5% being very familiar.



20. How familiar are you with Western Grains Research Foundation and its activities? Base: All respondents, n=600.

Comparisons of Familiarity with WGRF

Respondents' familiarity with the foundation and its activities varies among wheat/barley producers and demographics. The following graphs show the proportions of respondents who are at least somewhat familiar with WGRF and its activities.

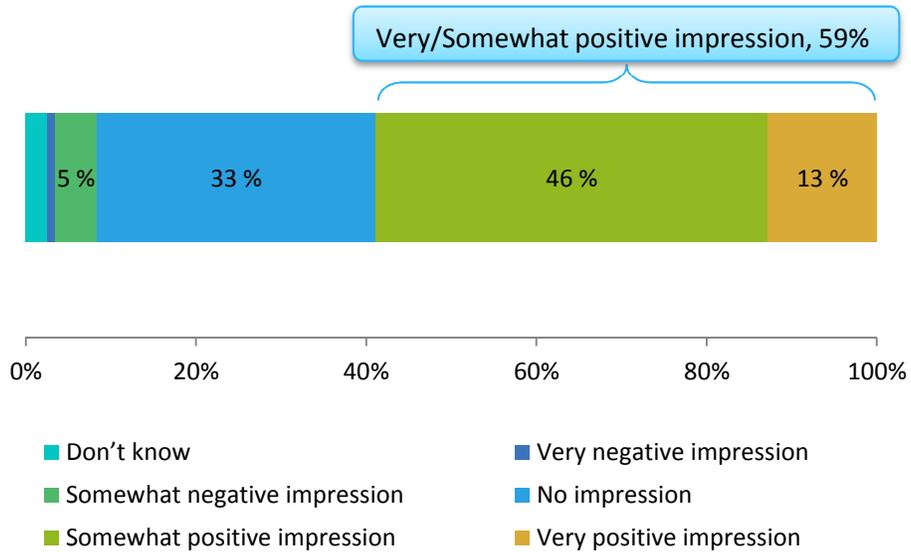


20. How familiar are you with Western Grains Research Foundation and its activities?

Base: All respondents, n=260 (wheat but not barley), n=51 (barley but not wheat), n=289 (both wheat and barley); n=66 (seed grower), n=534 (non-seed grower); n=219 (< 30 years), n=381 (30+ years); n=167 (750 acres or less), n=214 (751 – 2,000 acres), n=165 (2,001 – 5,000 acres), n=45 (5,001 acres and over).

Impression of WGRF

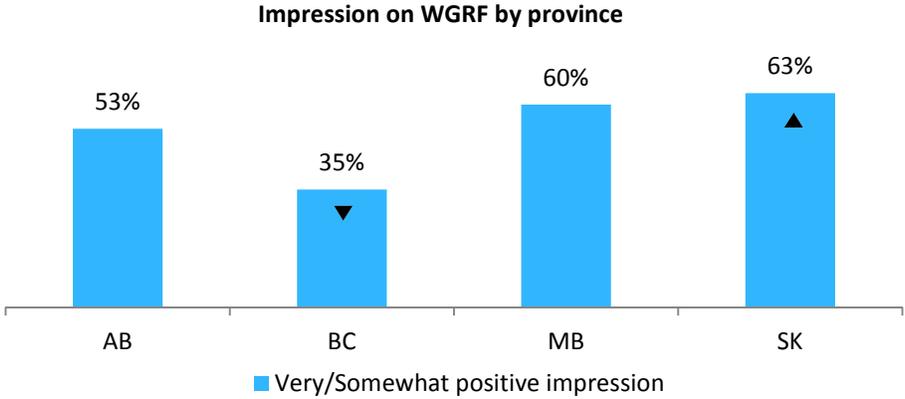
Next, producers were asked what impression they have of the WGRF. Six in ten (59%) respondents have a very (13%) or somewhat (46%) positive impression. Keeping in mind that the majority of respondents are not familiar with the foundation one-third (33%) of respondents have no impression of WGRF.



21. What impression do you have of the Western Grains Research Foundation? Base: All respondents, n=600.

Comparisons of Impression on WGRF

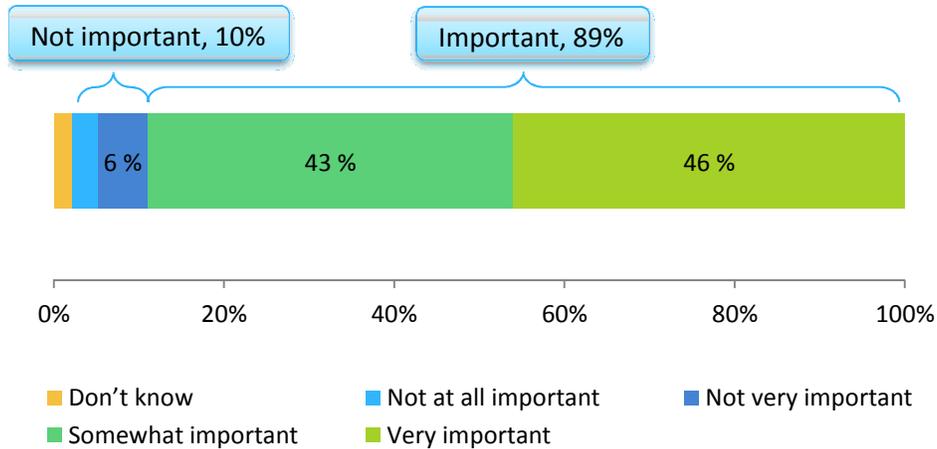
Comparing producers' impression on WGRF among different regions, respondents in Saskatchewan (63%) are more likely to have a positive impression of the foundation than those in British Columbia (35%). However, caution is recommended in interpreting the results due to the very small sample size of BC respondents (n=23).



21. What impression do you have of the Western Grains Research Foundation? Base: All respondents, n=150 (AB), n=23 (BC), n=122 (MB), n=305 (SK).

Importance of Research Oriented Foundations

When respondents were asked how important having a research oriented foundation like the WGRF for farmers in western Canada, a strong proportion of farmers feel it is at least somewhat important (89%). Nearly one half (46%) of respondents feel it is very important to have a research oriented foundation, while another 43% believe it is somewhat important. Less than one in ten feel it is not very (6%) or not at all (3%) important.



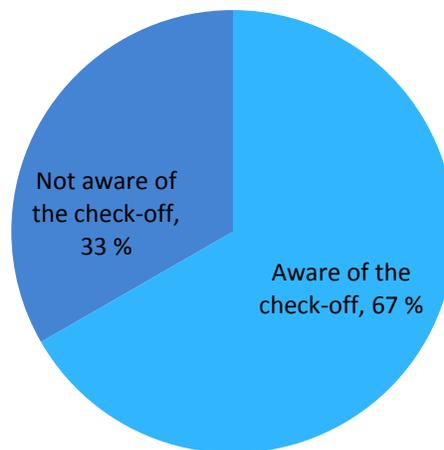
22. How important do you feel having a research oriented foundation like The Western Grains Research Foundation is for farmers in Western Canada? Base: All respondents, n=600.

Awareness of Check-off Funds

Respondents were provided with a brief description of the level and usage of wheat and barley check-offs.

Currently, the Western Grains Research Foundation receives funding from wheat and barley check-offs. The wheat check-off for research is \$0.30 per tonne for wheat and \$0.50 for barley (in Saskatchewan and Manitoba). This funds approximately \$5 million of wheat varietal research and three quarters of a million dollars for barley varietal research each year.

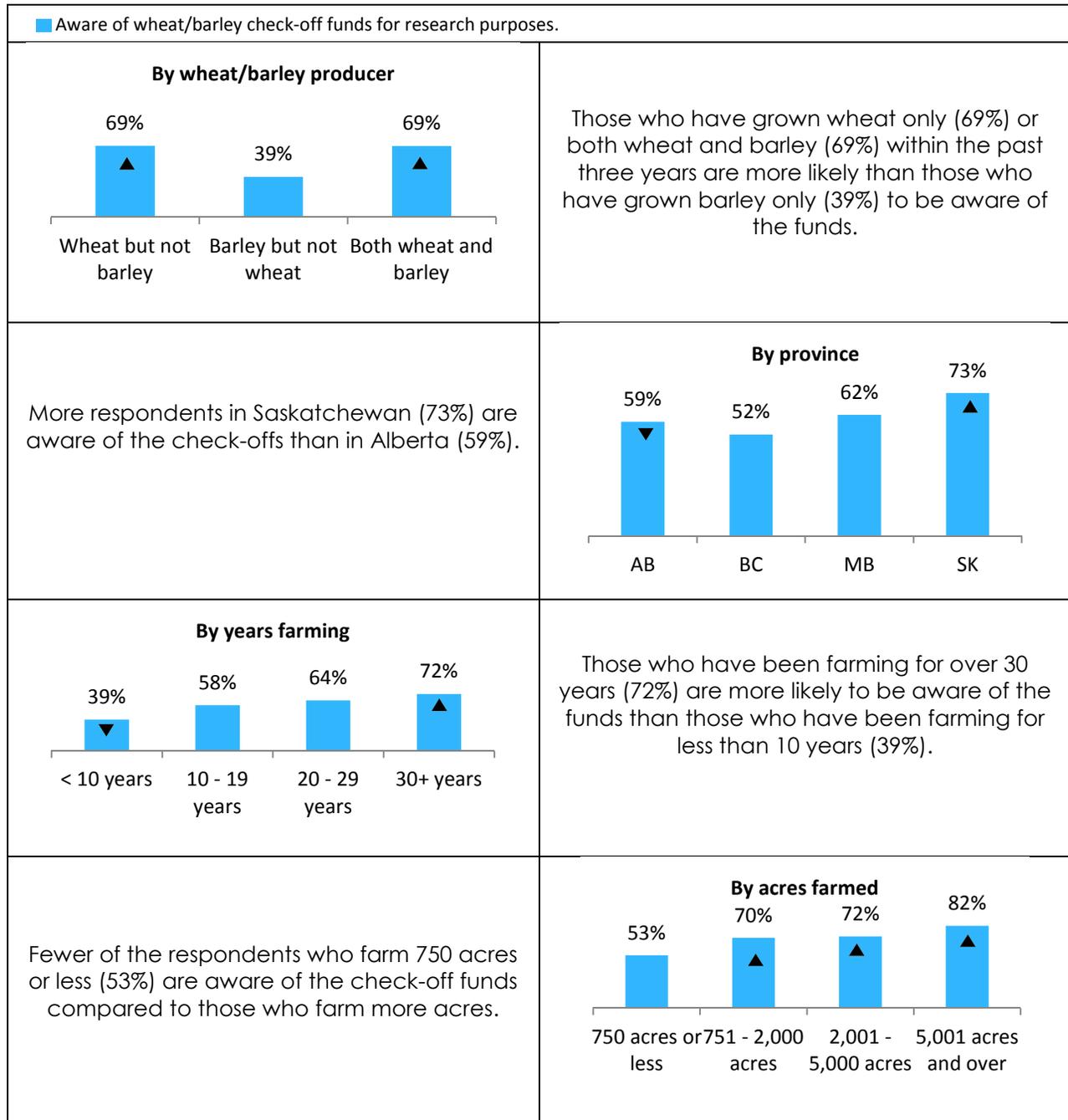
After being presented with the description, respondents were asked whether they are aware of the check-off revenue funding the WGRF uses for research purposes. Two thirds (67%) of respondents are aware of the check-offs for research purposes.



23. Before now, were you aware of the wheat/barley check-off revenue funding the Western Grains Research Foundation for this purpose? Base: All respondents, n=600.

Comparison of Awareness of Check-off Funds

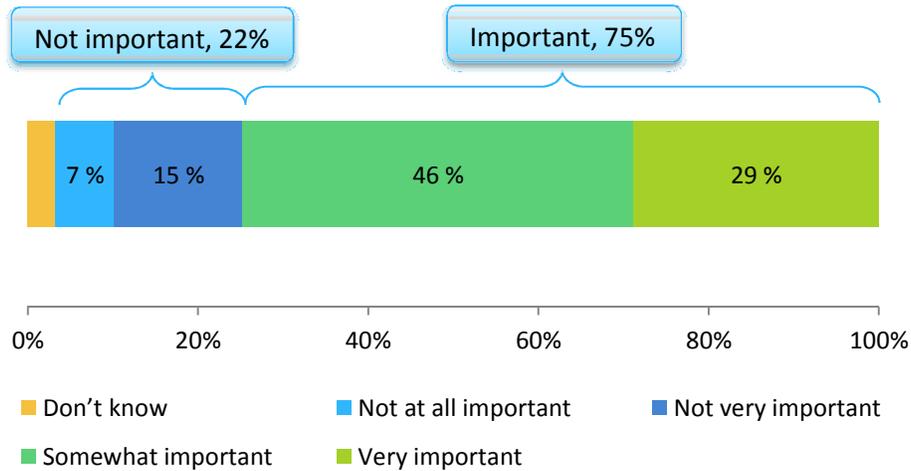
Producers' awareness of check-off funds varies among wheat/barley producers and demographics. The following graphs show the proportions of respondents who are aware of the check-offs for research purpose.



23. Before now, were you aware of the wheat/barley check-off revenue funding the Western Grains Research Foundation for this purpose? Base: All respondents, n=260 (wheat but not barley), n=51 (barley but not wheat), n=289 (both wheat and barley); n=150 (AB), n=23 (BC), n=122 (MB), n=305 (SK); n=219 (< 30 years), n=381 (30+ years); n=167 (750 acres or less), n=214 (751 – 2,000 acres), n=165 (2,001 – 5,000 acres), n=45 (5,001 acres and over).

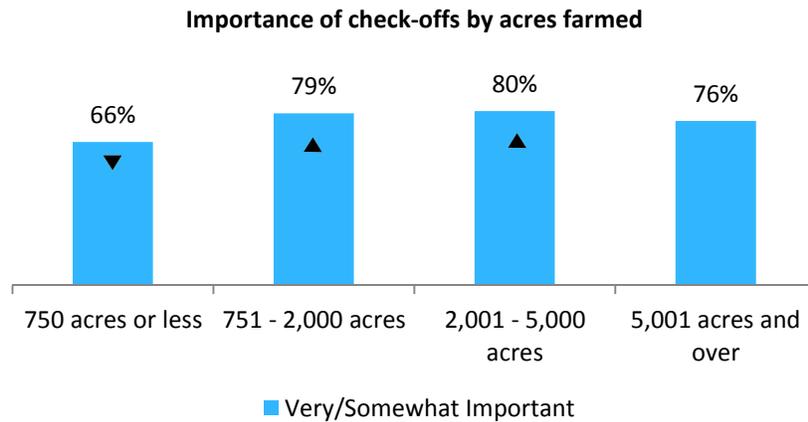
Importance of Check-off Funds

When asked how important these check-off funds are to producers, three quarters (75%) of respondents believe they are very (29%) or somewhat (46%) important. Nearly one quarter (22%) believe the check-off funds are not important to them, with less than one in ten (7%) feeling they are not at all important.



24. How important are these check-off funds to you as a producer? Base: All respondents, n=600.

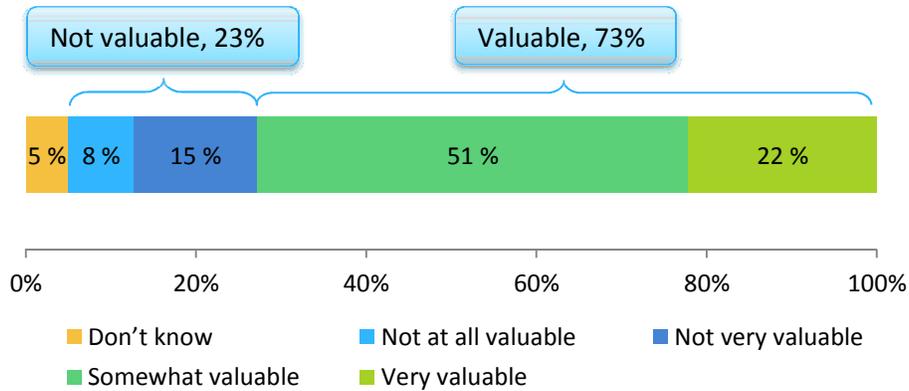
Those who farm more acres are more likely to believe check-off funds are important to producers.



24. How important are these check-off funds to you as a producer? Base: All respondents, n=167 (750 acres or less), n=214 (751 – 2,000 acres), n=165 (2,001 – 5,000 acres), n=45 (5,001 acres and over).

Value Received from Check-off Funds

When asked to rate the value received from the check-offs they contribute to WGRF for variety research, one half (51%) of respondents rate the value they receive from the check-offs to be somewhat valuable. Another two in ten (22%) rate the value they receive from the check-offs to be very valuable. Nearly one quarter (23%) rate the value to be not valuable; with about one in ten (8%) feeling they are not at all valuable.



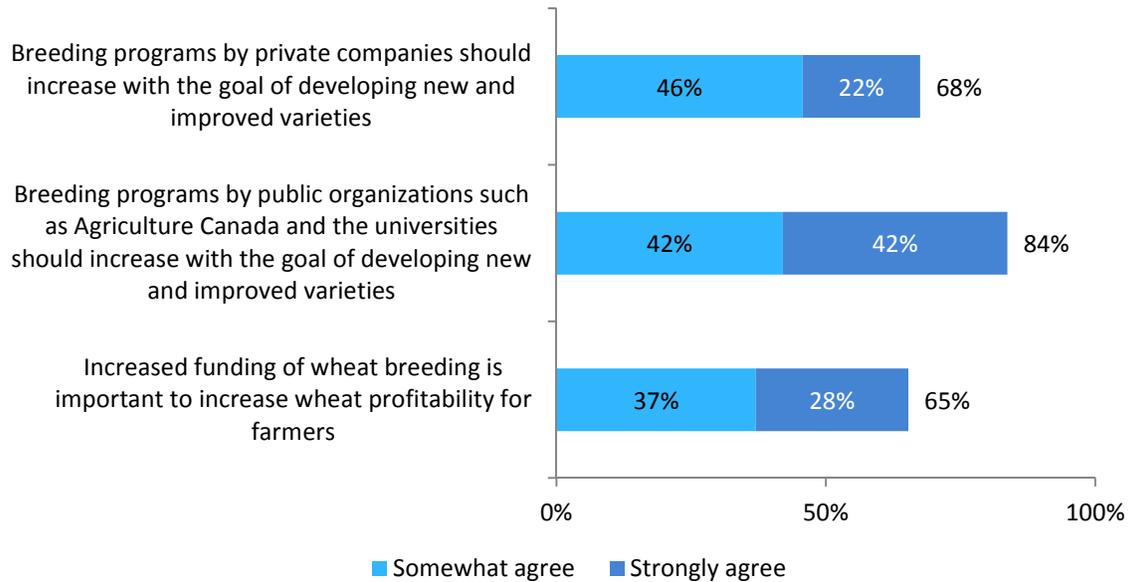
25. How would you rate the value you receive from the check-off you contribute to WGRF for variety research? Base: All respondents, n=600.

Agreement with Breeding Related Statements

Respondents were then asked to indicate the level of agreement with three breeding related statements.

Three quarters (65%) of respondents at least somewhat agree that increased funding of wheat breeding is important to increase wheat profitability for farmers (28% strongly agree).

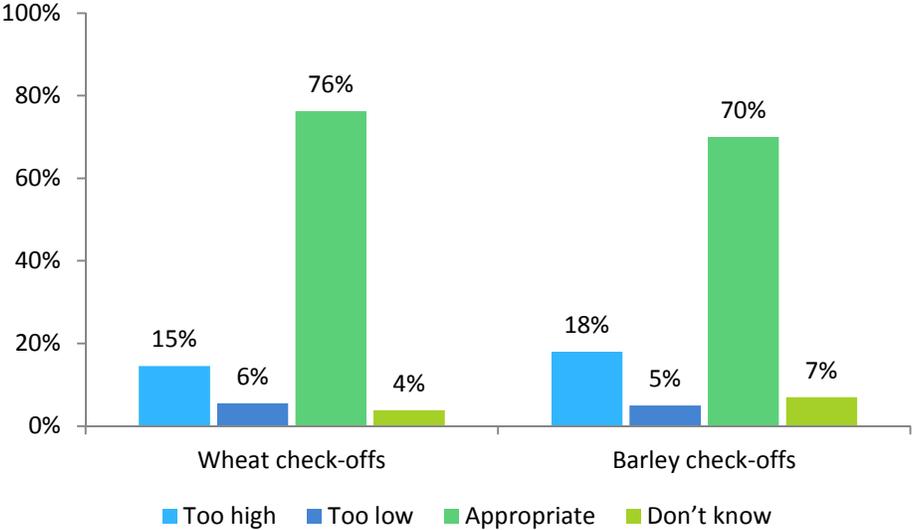
With respect to breeding programs by public/private organizations for the purpose of developing new and improved varieties, a majority of respondents at least somewhat agree that breeding programs by both public (84%) and private (68%) companies should increase. Fewer respondents (22%) strongly agree that breeding programs by private organization should increase in comparison to those who strongly agree that breeding programs by public organizations should increase (42%).



26. Please indicate your level of agreement with the following statements:. Base: All respondents, n=600.

Perception of the Level of Check-off Funds

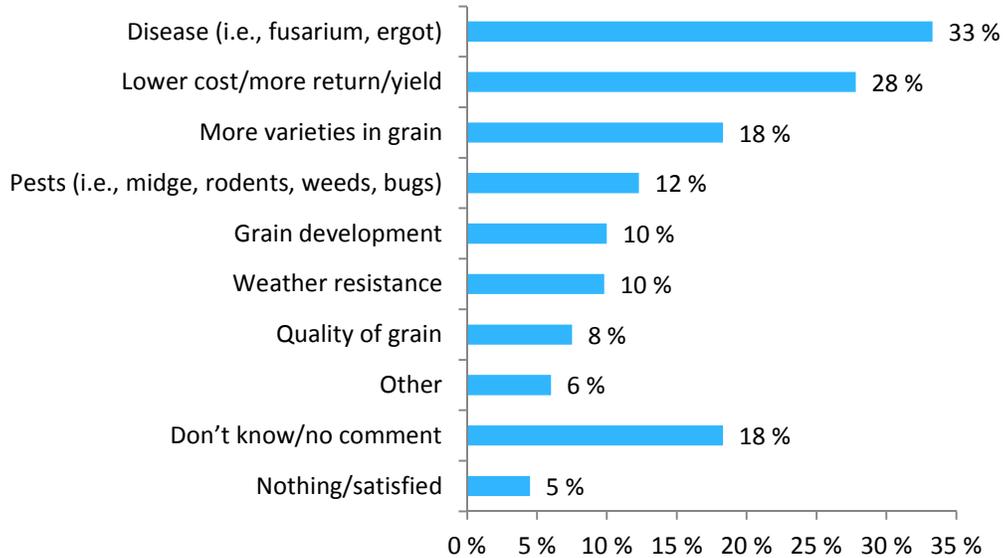
When asked about the level of wheat and barley check-offs, the majority of respondents feel the level of wheat (76%) and/or barley (70%) check-offs is currently appropriate. There are no differences in respondents' perception of the level of check-offs by major demographics.



27. Which of the following best describes how you feel about the level of wheat and barley check-offs? Base: All respondents, n=600.

Focus of WGRF's Research Efforts

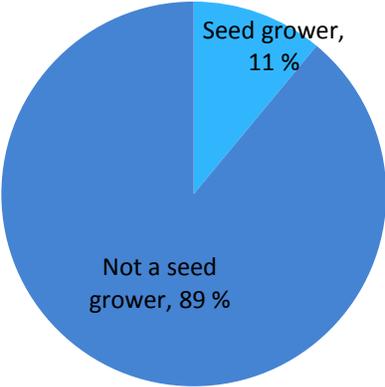
Respondents were asked to identify the areas that WGRF should be focusing their research efforts on in the next two years. The following lists the top mentions from respondents with multiple responses possible. One third (33%) feel that WGRF should focus on disease while three in ten (28%) believe they should focus on lowering costs, increasing returns or yields. Two in ten (18%) believe they should focus on researching more varieties in grain, while about one in ten suggest focusing on pests (12%), grain development (10%), weather resistance (10%), and quality of grain (8%).



28. What areas do you feel the Westerns Grains Research Foundation should be focusing their research efforts on in the next two years? Base: All respondents, n=600. Multiple responses possible.

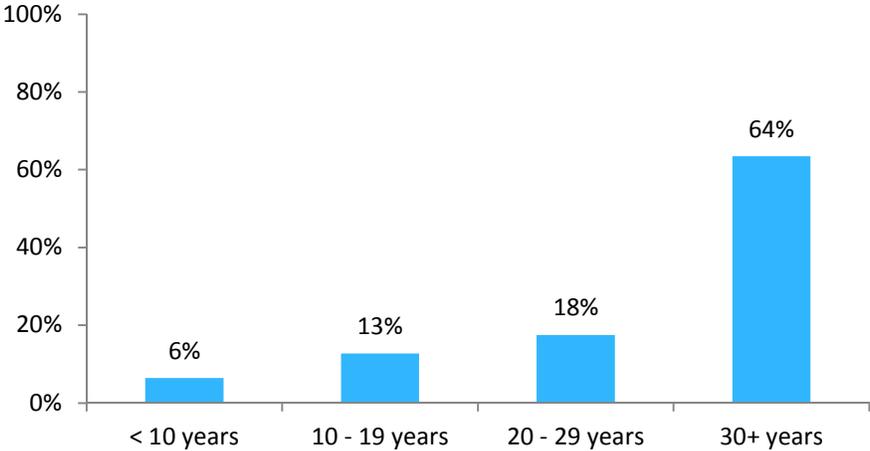
DEMOGRAPHICS

Seed Grower



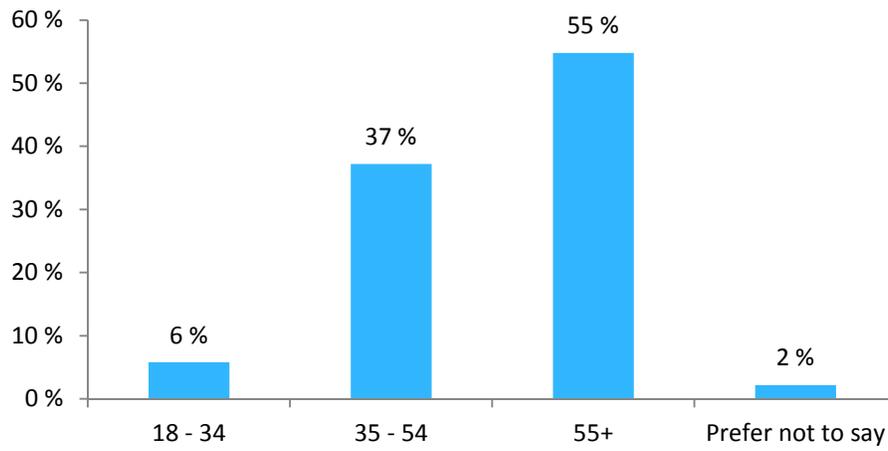
30. Are you a seed grower? (i.e. breeder, select, foundation, registered, commercial). Base: All respondents, n=600.

Years Farming



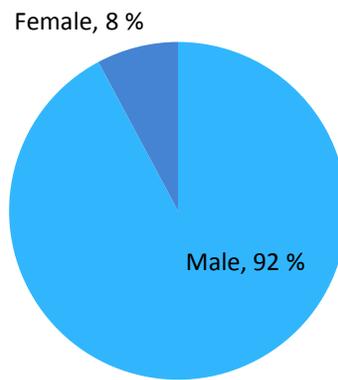
31. How many years have you been farming? Base: All respondents, n=600.

Age



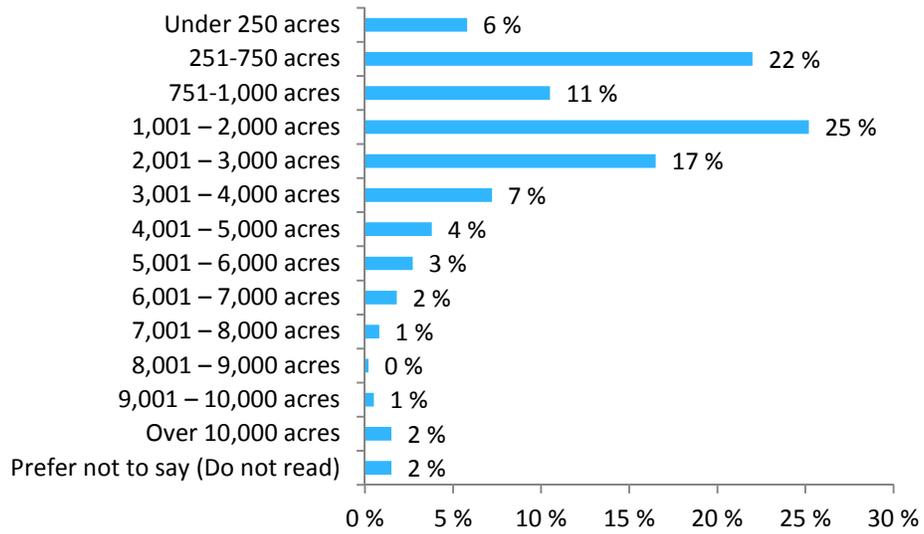
32. What is your year of birth? Base: All respondents, n=600.

Gender



34. Record gender from voice. Base: all respondents, n=600.

Acres Farmed



35. On an annual basis, how many acres do you farm, including owned as well as rented land? Base: All respondents, n=600.