

Winnipeg Free Press/Jory Capital Probe Research Inc. News Release

MANITOBANS' ASSESSMENT OF PROPOSED WHEAT BOARD CHANGES

Release Date: December 27th, 2006

This province-wide Omnibus survey was designed and conducted by Probe Research Inc. via telephone interviews conducted between November 27th and December 5th, 2006 among a random and representative sampling of 1,000 Manitoba adults.

With a sample of 1,000 one can say with 95 percent certainty that the results are within +/- 3.1 percentage points of what they would have been if the entire adult population of Manitoba had been interviewed. The margin-of-error is higher within each of the survey's population sub-groups.

Modified random digit dialling was used to ensure that all Manitoba adults would have an equal opportunity to participate in this Probe Research survey. Minor statistical weighting has been applied to this sample to ensure that the age and gender balance correspond with the province as a whole.

MANITOBANS' ASSESSMENT OF PROPOSED WHEAT BOARD CHANGES

Winnipeg, Manitoba – Although most Manitobans are at least partially familiar with the recent controversy concerning the future of the Canadian Wheat Board (CWB), citizens are evenly divided on the question of whether or not they support the federal government's proposal to end the Winnipeg-based CWB's single-desk marketing system, with a large number of Manitobans remaining undecided on this question. Probe Research conducted this random and representative sampling of 1,000 Manitoba adults for the *Winnipeg Free Press* and *Jory Capital* between November 27th and December 5th, 2006.

Other research findings show that, regardless of which marketing model is implemented, an overwhelming majority of Manitobans feel that the choice concerning the future of the CWB should be one made by western Canada's wheat and barley producers themselves.

Jory Capital sponsored this survey, released exclusively to the *Winnipeg Free Press*, to provide Manitobans with insight into issues concerning the state of the Manitoba economy and business environment.

Nearly Two-Thirds of Manitobans Watching This Story

At the beginning of this survey, respondents were asked if they recalled seeing, hearing or reading anything lately about the potential changes to the Canadian Wheat Board. Nearly two-thirds of Manitoba adults (64%) indicated that they were aware of this ongoing debate. Issue awareness was highest among men (71%), those aged 55 or over (84%) and households earning \$60,000 or more (70%).

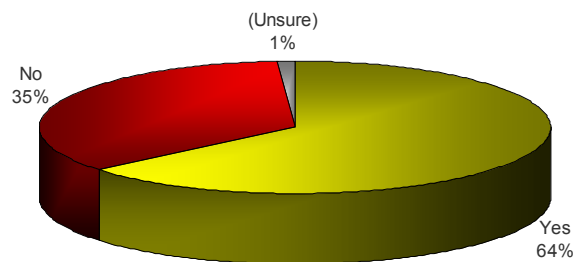
Among those who say that they are aware of these changes, more than four in ten say that they are opposed to ending the single-desk marketing system (44%, including 28% strongly oppose), while one-third support ending the single-desk system (32%, including 15% strongly support) and one-in-four (24%) say they are undecided. In contrast, those who are less aware of this issue are more likely to be undecided on what the outcome should be (47%) than to be supportive of (36%) or opposed to the federal government's proposed changes (17%).

Figure 1



Manitobans' Awareness of Proposed Changes to the Canadian Wheat Board

Q1. "Have you seen, read or heard anything lately about potential changes to the Canadian Wheat Board?"
(n=1,000)



Manitobans Evenly Split on the Future of Single-Desk Marketing

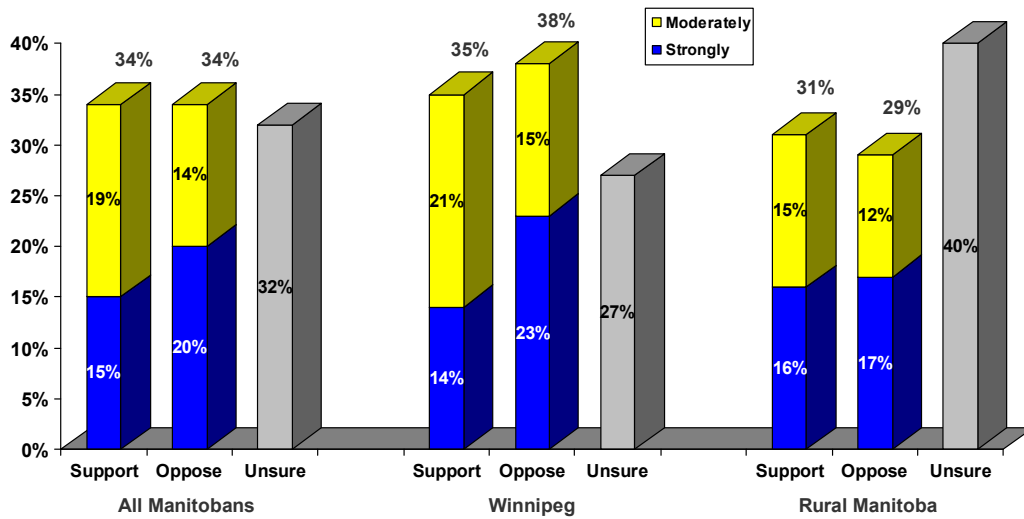
When asked whether they support or oppose the federal government's proposal to end the Canadian Wheat Board's single-desk marketing system for wheat and barley grown in western Canada, just as many Manitoba adults support this change to the 71-year old Wheat Board (34%, including 15% "strongly support") as oppose this initiative (34%, including 20% "strongly oppose"). Just as many Manitobans say that they have not made up their mind one way or the other on this issue (32%, rising to 40% outside of Winnipeg).

Figure 2

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Manitobans' Views on Proposed Abolition of the Single-Desk Marketing System

Q2. "The federal Government has proposed major changes to the Canadian Wheat Board and to the way wheat and barley is marketed in western Canada. One of these proposed changes would be to end what has been called the single-desk marketing system. This single-desk approach means that wheat and barley farmers in western Canada market these grains to the Canadian Wheat Board and the Wheat Board, in turn, takes full responsibility for marketing this wheat around the world. Based on what I have just told you and on anything else you may have seen, read or heard about these proposed changes to the Canadian Wheat Board, do you support or oppose this proposal to end the Canadian Wheat Board's single-desk marketing system? (And is that strongly or moderately?)" (n=1,000).



Those most likely to support the proposed *abolition* of the single-desk marketing system include:

- Men (39% versus 28% among women)
- Supporters of the provincial Progressive Conservatives (48% versus 31% among Liberal supporters and 25% among NDP supporters)

Those most likely to *oppose* the proposed abolition of the single-desk marketing system include:

- Winnipeg residents (38% versus 29% among those living outside of Winnipeg)
- Manitobans aged 55+ (43% versus 25% among those aged 18-34)
- Those who express an existing awareness of the proposed changes (44% versus 17% who expressed little or no awareness)
- Supporters of the provincial NDP (53% versus 31% among provincial Liberal supporters and 25% among PC supporters)


Those most likely to be undecided on the proposed abolition of the single-desk system include:

- Manitobans living outside of Winnipeg (40% versus 27% among Winnipeg residents)
- Women (39% versus 26% among men)
- Younger Manitobans (40% among those aged 18-34 versus 27% among those aged 55+)
- Those who express little or no existing awareness of the proposed changes (47% versus 24% among those who express an existing awareness of this issue)
- Provincial Liberal party supporters (38% versus 27% among PC supporters and 22% among NDP supporters)

Rationale for Supporting Proposed Wheat Board Changes

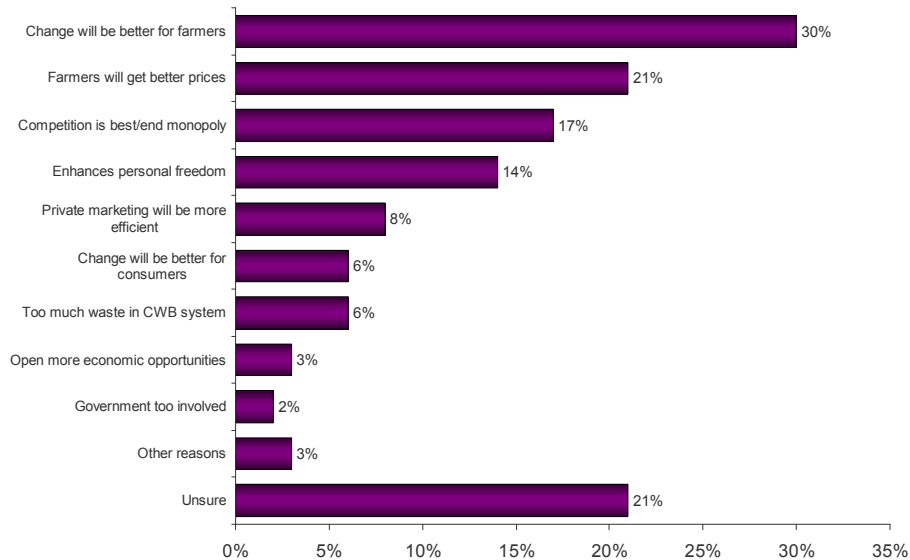
Those who voiced support for the federal government's proposal to end the CWB's single-desk marketing system for wheat and barley grown in western Canada were asked to explain in their own words why they supported this initiative. As Figure 3 shows, most of these respondents say that they support ending the single-desk marketing system because they believe that *this change will be better for farmers* (30%), that *farmers will get better prices* (21%), that *having competition would be better than a CWB monopoly* (17%) or that this change would *enhance personal freedom* (14%).

Figure 3



Reasons for Supporting Abolition of the Single-Desk Marketing System

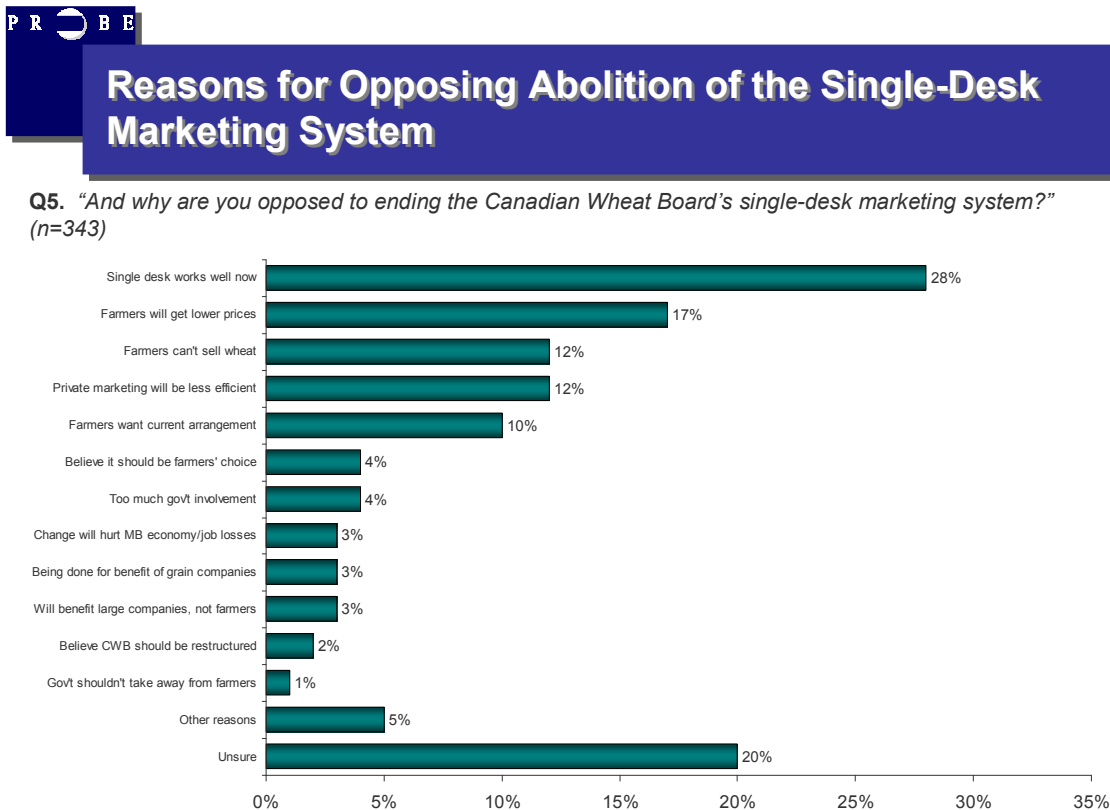
Q4. "And why are you in favour of ending the Canadian Wheat Board's single-desk marketing system?" (n=334)



Rationale for Opposing Proposed Wheat Board Changes

Those Manitobans who voiced opposition to the federal government's proposal to end the CWB's single-desk marketing system for marketing wheat and barley grown in western Canada were also asked to specify their reasons for taking this position. Leading reasons given by these respondents included that *the single-desk system works well as it is* (28%), that *farmers will receive lower prices without the single desk* (17%), that *private marketing would be less efficient* (12%), that *farmers are not in the business of selling wheat* (12%) or that *the farmers support the current arrangement* (10%).

Figure 4



Three-Quarters Say Farmers Should Have Final Say on Wheat Board Changes

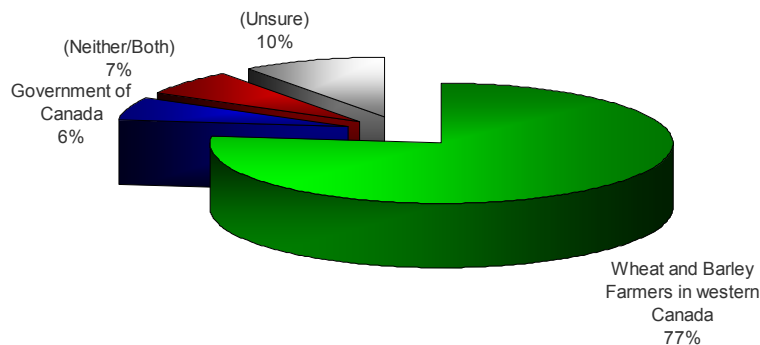
As Figure 5 below illustrates, a clear consensus is evident among Manitobans that wheat and barley farmers should themselves have the final say on whether or not to abolish the Canadian Wheat Board's single-desk marketing system. Fully three Manitobans in four (77%) agree that wheat and barley farmers in western Canada should make the final decision on whether or not to end single-desk marketing, compared to fewer than one in ten (6%) who feel that the federal government should make the final decision. Equally small numbers say that this decision should either be made "jointly" or by "neither" of these two groups (7%) or indicate that they do not know who should make this decision (10%).

This strong level of support for leaving the final decision in the hands of wheat and barley farmers in western Canada was consistent from all walks of life.

Figure 5



Q3. "And who do you believe should make the final decision on whether or not to end the Canadian Wheat Board's single-desk marketing system for wheat and barley? Should this decision be made by..." (n=1,000)



Manitobans' Opinions on Proposed Wheat Board Changes by Demographic Subgroups

	Total		Region		Age			Aware of Proposed Changes		Gender		Provincial Party Preference		
	Winnipeg	Rest of MB	18-34	35-54	55+	Male	Female	Male	Female	NDP	PC	Liberal		
Awareness of Proposed Changes														
Aware	64	65	39	68	84	71	58	100		73	69	50		
Not Aware or Unsure	36	35	61	32	16	29	42	--		27	31	50		
Ending of Single-Desk System														
Strongly Support	15	14	15	14	14	19	10	15		9	22	16		
Moderately Support	19	21	20	21	16	20	18	17		16	26	15		
Moderately Oppose	14	15	13	17	12	14	13	16		18	11	12		
Strongly Oppose	20	23	12	19	31	21	20	28		35	14	19		
Unsure	32	27	40	29	27	26	39	24		22	27	38		
(Support)	34	35	35	35	30	39	28	32		25	48	31		
(Oppose)	34	38	25	36	43	35	33	44		53	25	31		
(Unsure)	32	27	40	29	27	26	39	24		22	27	38		
Final Decision To Be Made By...														
Farmers	77	78	72	77	82	76	78	83		83	76	79		
Government	6	8	7	6	4	8	4	5		6	7	3		
(Both/Neither)	7	7	7	8	7	6	8	7		6	7	2		
(Unsure)	10	7	14	9	7	10	10	5		5	10	16		

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