

Canola Performance Trial Program Online Survey Results February 2016

insightrix™



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Objectives

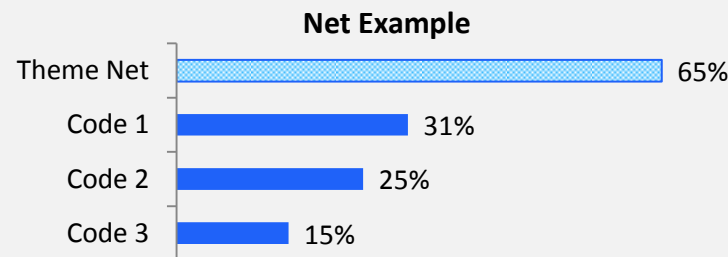
The Canola Performance Trial (CPT) Online Survey was conducted to determine the value of the program to growers.

Specific goals included assessing:

- Timeliness of the information provided
- Usefulness of the information (i.e. does it help growers in making purchasing decisions)
- Which information sources are trusted and what information is valued
- Which communication methods are preferred to receive information from CPT
- Preference for how best to present information from CPT
- Value of the small plot data information

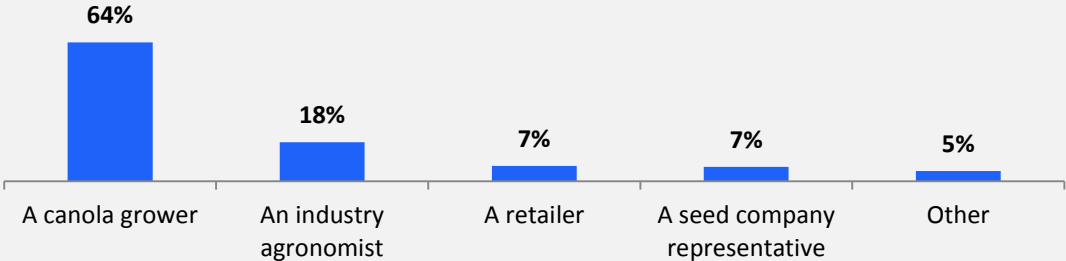
Methodology

- The questionnaire was designed by Inshightrix with input from Canola Council of Canada.
- An open online survey link was provided to Canola Council of Canada who shared it with growers.
- Data collection took place between November 25th, 2015 and February 7th, 2016. In total, 368 completed surveys were obtained.
- Due to rounding, results may not add to exactly 100%.
- In some places, similar themes and codes are organized into Net themes based on overarching commonalities in the content of responses. Nets are presented in a different colour, and all codes underneath are included in the Net. The percentages of individual codes may not add up to the Net as multiple responses may be possible.



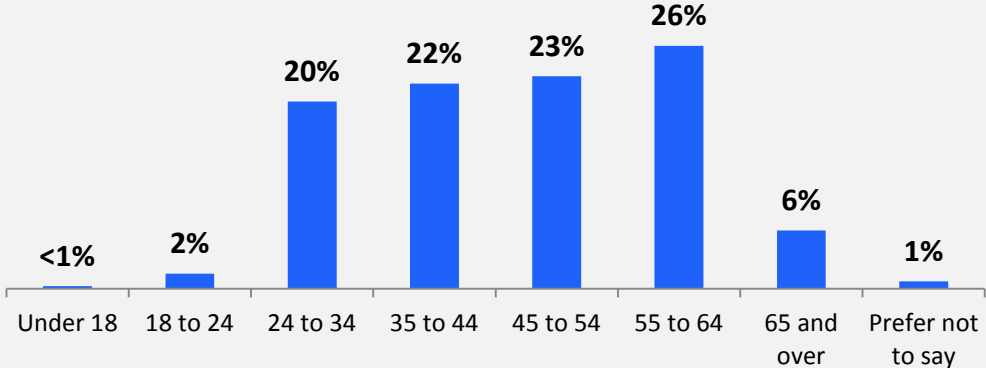
Demographics

Profile

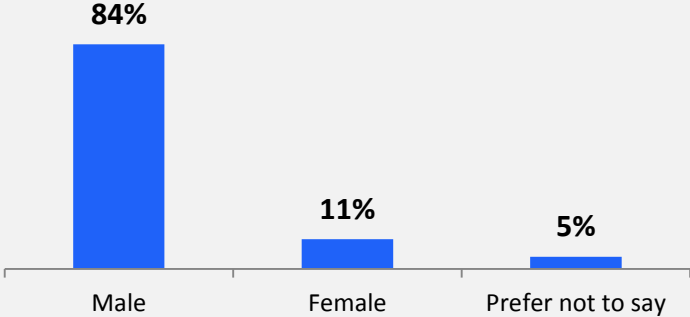


Those identifying as other than “Canola Grower” were asked to answer based on what they believe growers are looking for.

Age Range



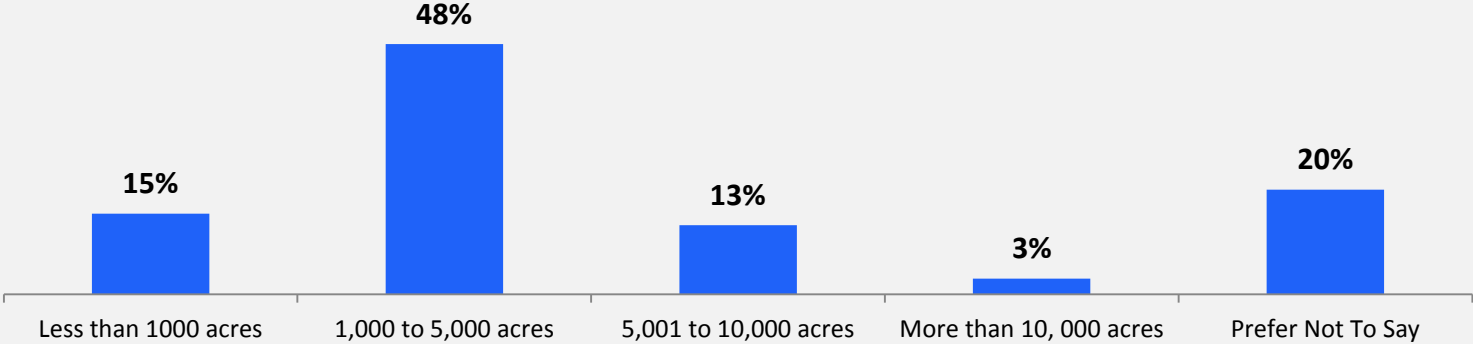
Gender



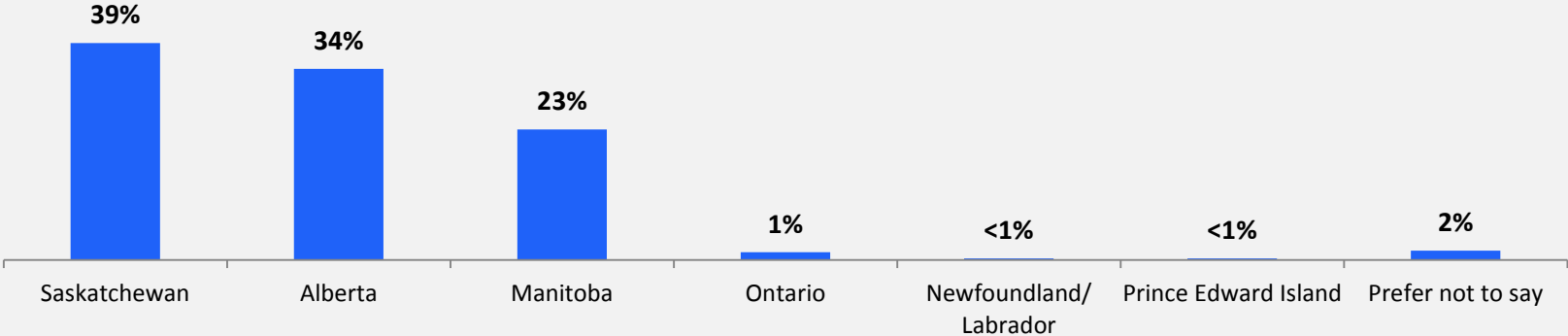
Base: All respondents, n=368.

Demographics

Acres Farmed



Province



Base: All respondents, n=368.

Executive Summary



Executive Summary

Variety Purchase

Top Factors When Choosing Canola Variety (Ranked First):

- Seed Yield (45%)
- Agronomic factors (19%)

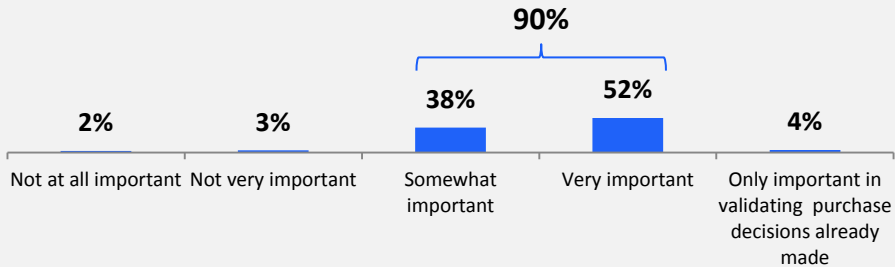
Most Important Variety Traits (Ranked First):

- Seed Yield (53%)
- Herbicide Tolerance System (21%)

Look at Own and Other Areas When Considering:

- Variety Trial Data (84%)
- Seed Yield Data (79%)

Importance of Variety Performance Data in Purchase Decision



Purchase Decision Timing

- Typically made either 1 to 4 weeks (38%) or 1 to 3 months (46%) after harvest
- Split between purchase decision being changed sometimes (49%) and rarely (51%) before final
- Top factors that could impact choice include new data, seed availability, and agronomic considerations

Variety Information

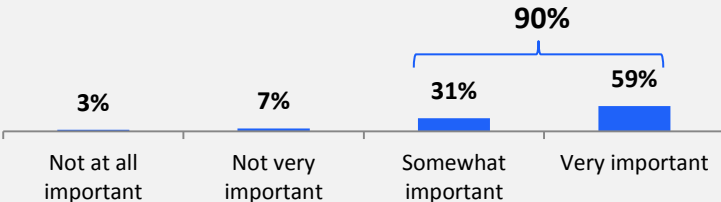
Most Influential Sources (Ranked First):

- Past Experience (33%)
- Independent Data/CPT (25%)

Information Preference

- Receiving:*
- Online/electronic (43%)
 - Printed (33%)
- Reviewing:*
- Data Tables (56%)

Importance of Variety Data Coming from Independent/Third Party Source



Executive Summary

Trial Data Quality

Most Trusted Data Source

- Field/small plot equally (58%)
- Only field scale (35%)

Value of Data for Evaluating Varieties

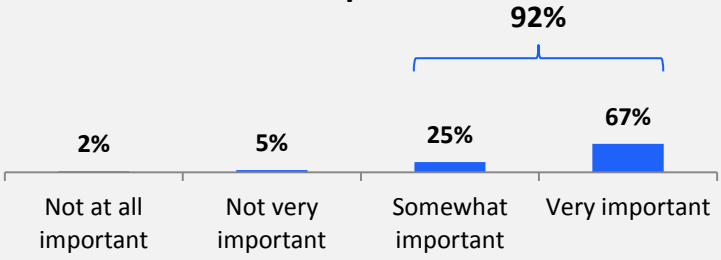
(Somewhat and Very Valuable)

- Field Scale (96%)
- Small Plot (83%)

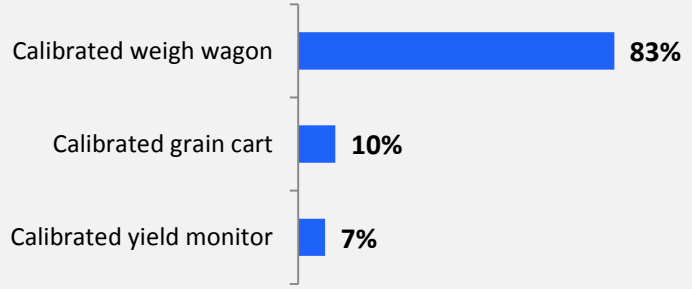
Preference for Involvement (Ranked First):

- Small Plot:*
- CCC/Other third party (56%)
- Field Scale*
- CCC/Other third party (42%)
 - Farmer (36%)

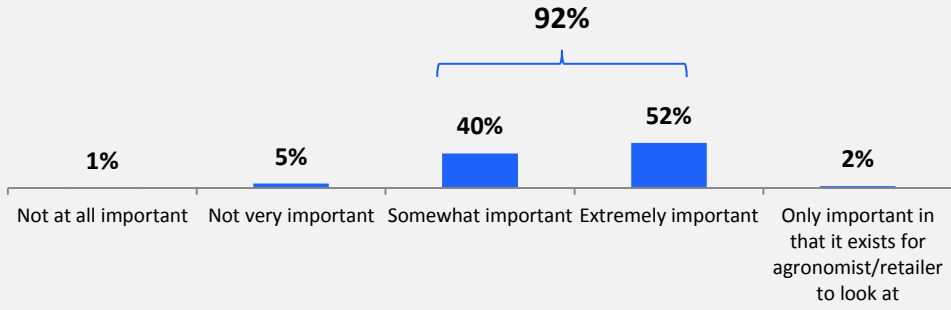
Importance of Viewing Variety Trial Data from Sources other Than Seed Companies



Confidence in Canola Yield Data Coming From... (Ranked First)



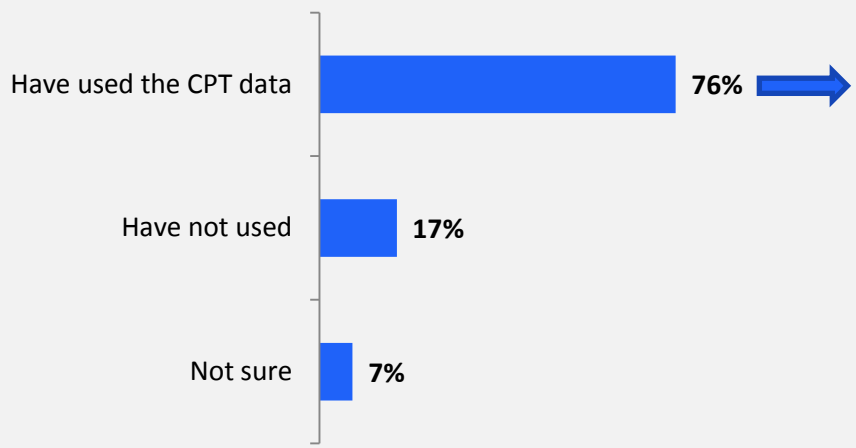
Importance of Statistical Analysis Being Used on Variety Data



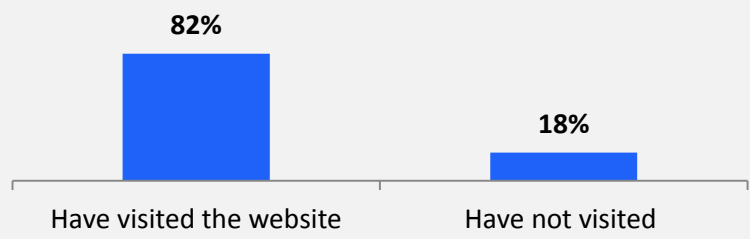
Executive Summary

Canola Performance Trials

Canola Performance Trials (CPT) Data Usage in Choosing Canola Varieties



Website Visitation



Satisfaction

	% Satisfied (Rated 7 to 10)	Average Rating (Out of 10)
Overall Satisfaction	86%	7.6
The format and layout the information is presented in	90%	8.0
The communication methods used to distribute the information	86%	8.0
The usefulness of information in regards to your decision to purchase a specific variety	83%	7.7
The value of the information from the small plot trials	75%	7.2
The timeliness of information	66%	7.0
Having representation from all the major seed distributors in the CPTs	61%	6.5

Key Findings

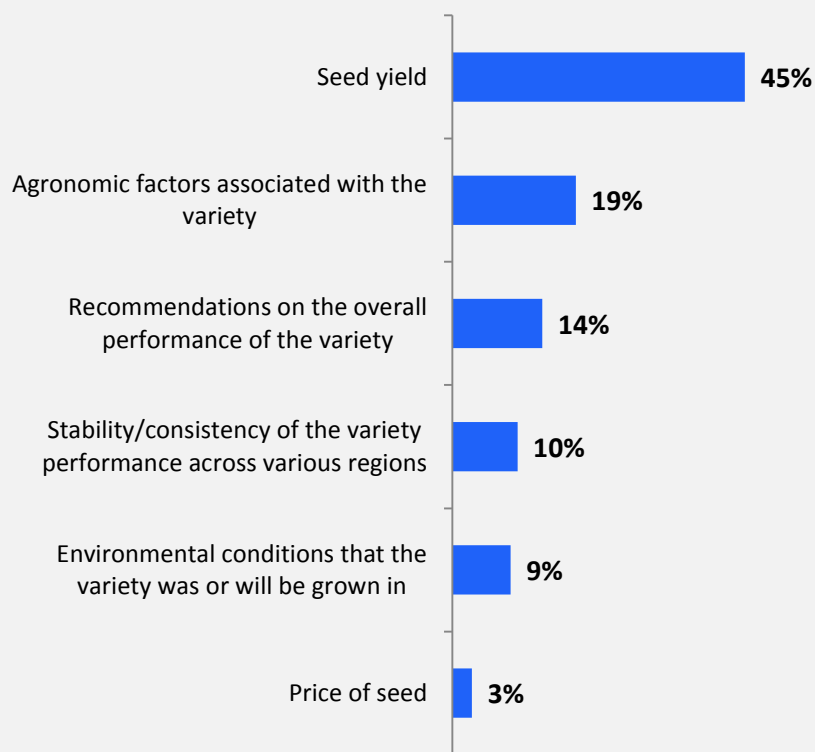
- Most (90%) say variety performance data is either somewhat (38%) or very (52%) important to the variety purchase decision
 - Seed yield is the most important aspect considered when making the decision
 - Ranked as top factor when choosing a canola variety (45% ranked first, 86% in top three)
 - Ranked as most important variety trait (53% ranked first, 92% ranked in top three)
 - The purchase decision is most commonly made in the month after harvest (38%) or one to three months after (46%). The top factors that could potentially change the variety choice between the decision and purchase are new data becoming available, availability of the seed, and agronomic considerations
- It is important (90%, 31% somewhat and 59% very) that variety data come from an independent third party
 - While there are a variety of information sources consulted, past experience (33%) and independent data, including the Canola Performance Trials (25%) are most common. When receiving information, preferences are for online/electronic (43%) and printed material (33%). Over half prefer the information in data tables (56%)
- The preference is for the Canola Council of Canada (or another independent third party) to be most involved in both small plot (56%) and field scale (42%) trials
 - Data is seen as valuable when evaluating varieties (field scale: 96%, small plot: 83%)
 - Confidence is highest in data coming from calibrated weigh wagons (83% ranked as first)
 - Most (92%, 40% somewhat and 52% very) believe it is important that statistical analysis is performed on the variety data
- Overall satisfaction with the Canola Performance Trials is high, with 86% rating their satisfaction between seven and ten.
 - Satisfaction with the various facets of the CPT is highest with the format/layout and communication methods, and comparatively lowest with having representation from all of the major seed distributors.
 - Three quarters (76%) have used the CPT data when choosing varieties
 - Eight in ten (82%) say they have visited the CPT website.

Variety Purchase Controls

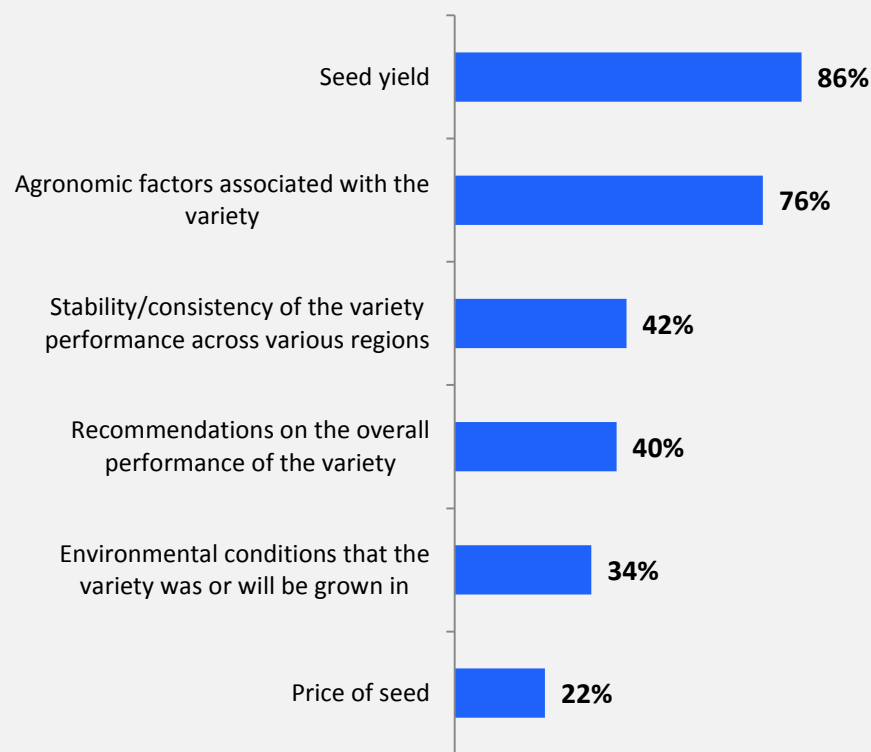


When choosing a canola variety, seed yield is the top factor considered (45% ranked as first). Agronomic factors are also seen as important (76% rated it in their top three).

Factors Considered When Choosing Canola Variety (Ranked First)



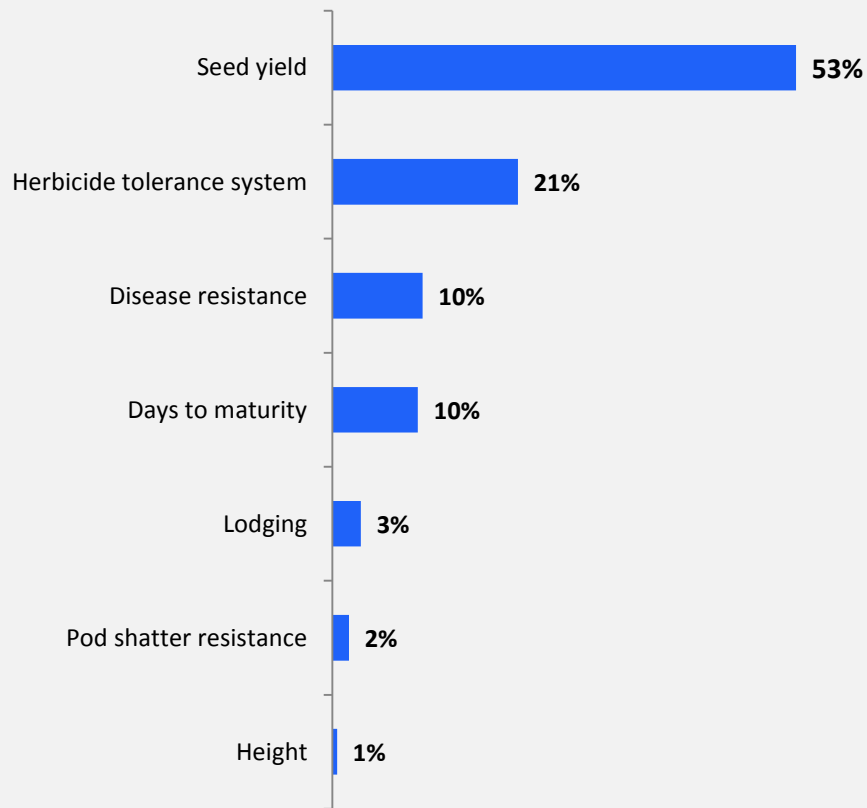
Factors Considered When Choosing Canola Variety (Ranked in Top Three)



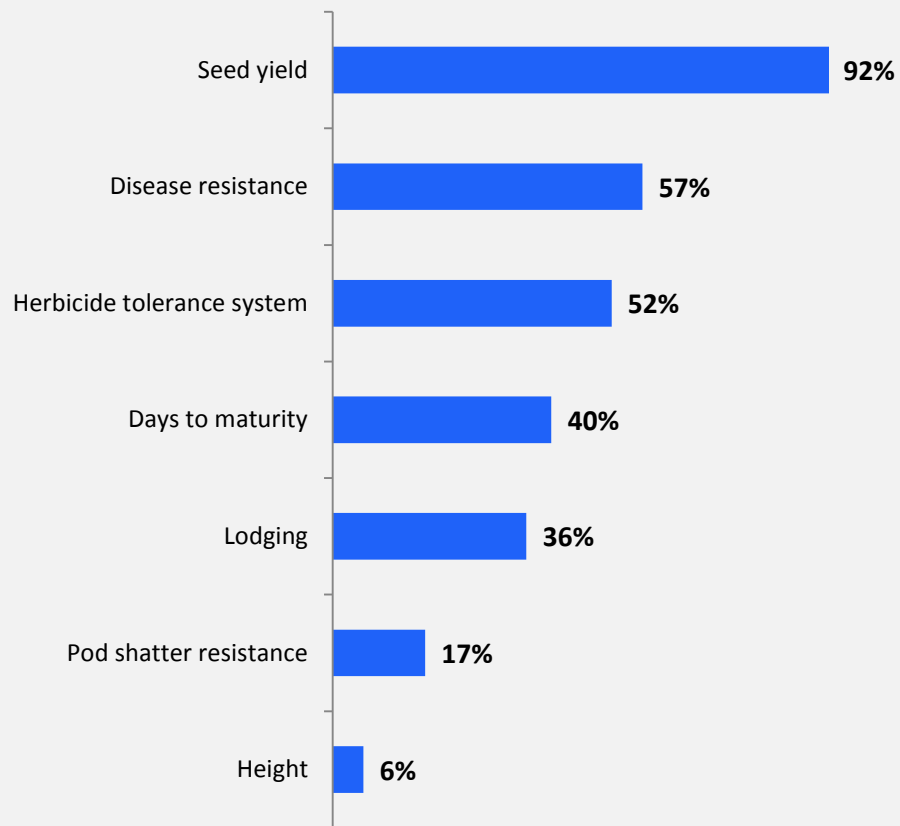
1. What factors do you consider when choosing a canola variety for your farm? Please rank the following in terms of importance? Base: All respondents, n=368.

More than half of respondents (53%) rank seed yield as their most important variety trait, with almost all (92%) placing it in their top three most important factors.

Most Important Variety Traits (Ranked First)



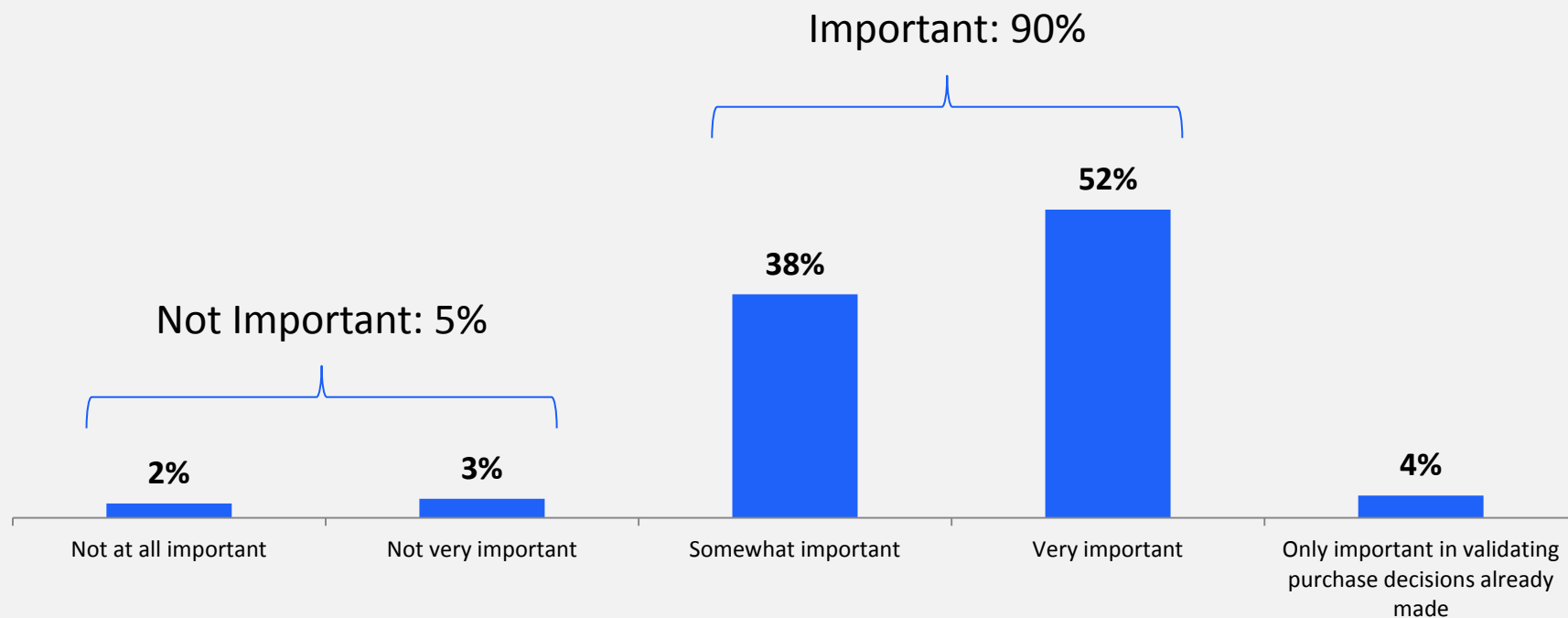
Most Important Variety Traits (Ranked in Top Three)



2. Thinking specifically about variety traits, which of the following factors do you consider most important? Please rank them in order of importance. Base: All respondents, n=368.

Most (90%) say that performance data is important in making their variety purchase decision (38% somewhat and 52% very important).

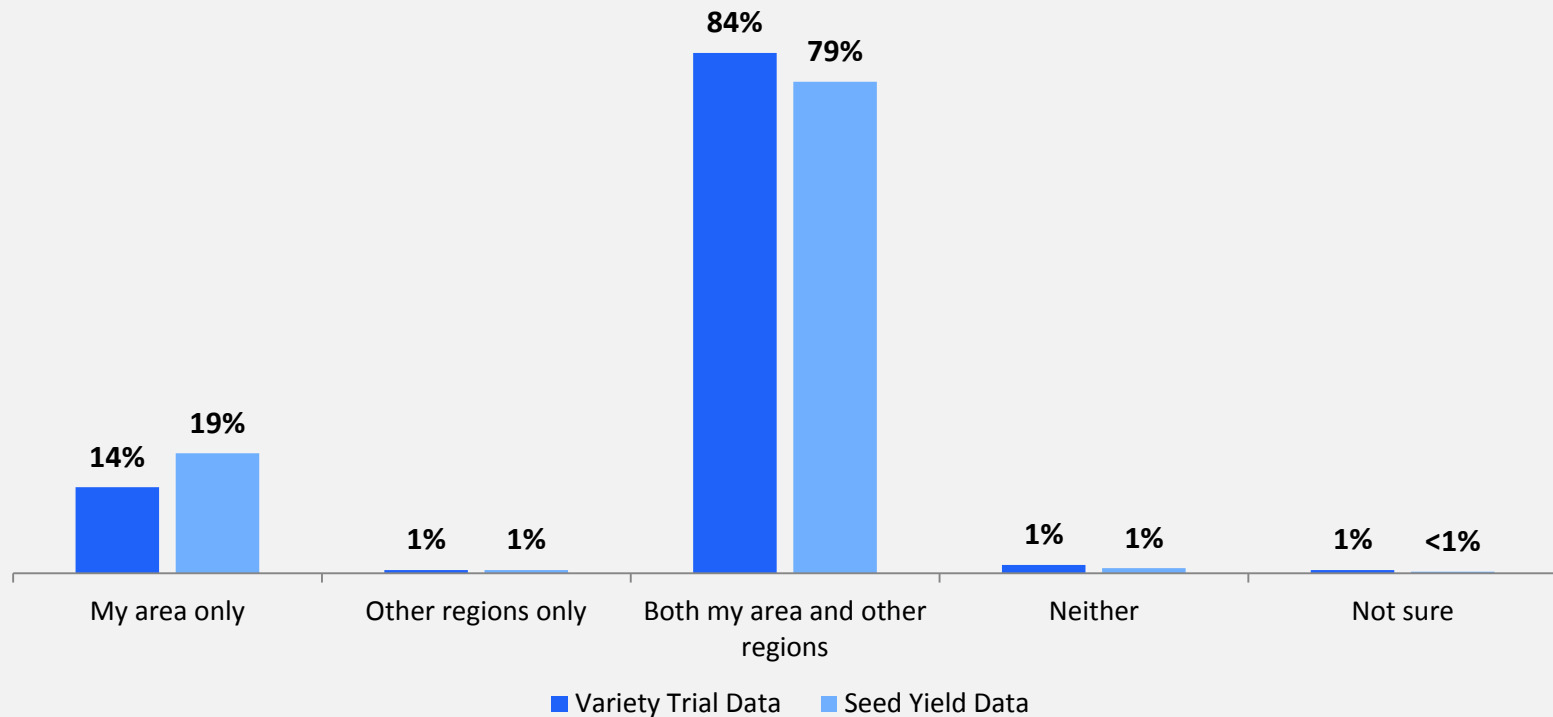
Importance of Variety Performance Data in Purchase Decision



3. How important are variety performance data in making your variety purchase decision? Base: All respondents, n=368.

Most say that they consider data from both their area and other areas when looking at both variety trials (84%) and seed yields (79%).

Areas Looked at When Considering...



4. When considering all variety trial data (including seed yield, days to maturity, lodging, pod shatter resistance, etc.), do you look at data from your area only or other regions too?

5. When considering only seed yield data from variety trials, do you look at data from your area only or other regions too?

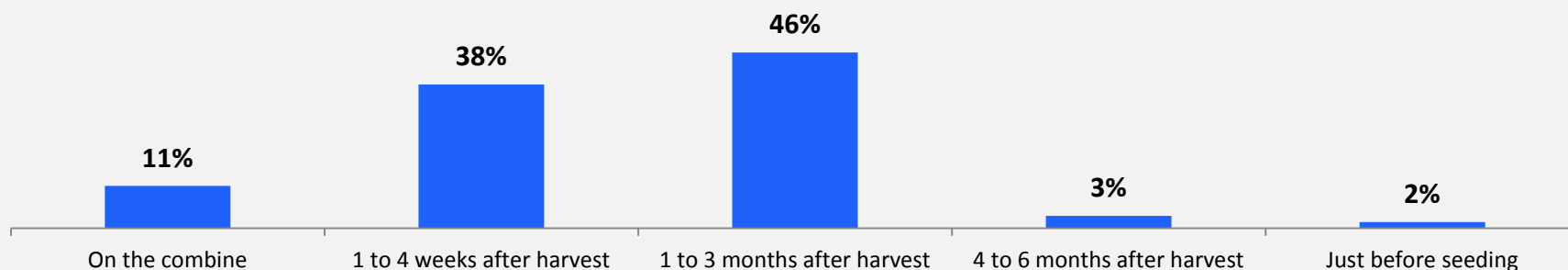
Base: All respondents, n=368.

Timing of Variety Purchase Decisions

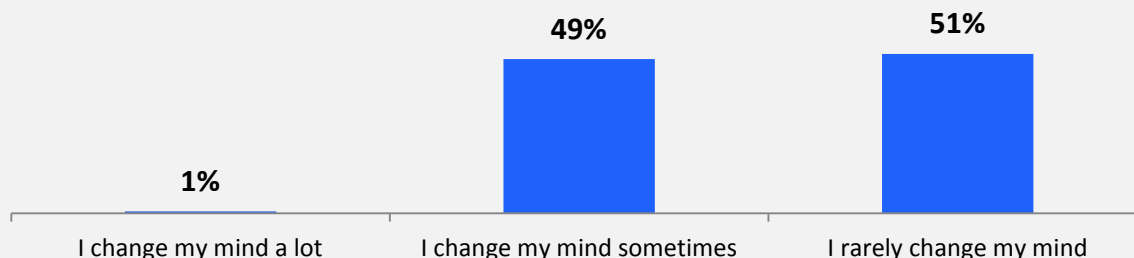


Most commonly, the variety purchase decision is made either 1 to 4 weeks after harvest (38%) or 1 to 3 months after harvest (46%). There is about an even split between those who say they sometimes change their mind between the decision and the actual purchase (49%) and those who say they rarely do so (51%).

Purchase Decision - Variety Performance Data Timing Requirement



Purchase Decision - Change Frequency



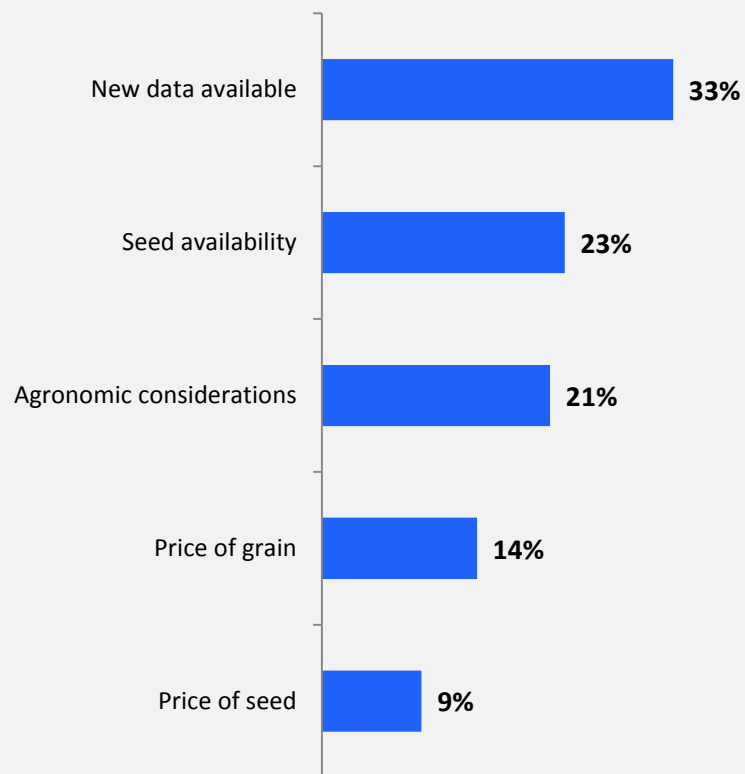
6. When do you require variety performance data in order to inform your purchasing decision?

7. In the time between when you've made a decision on a variety to purchase and the actual time of purchase, how often would you say you change your mind?

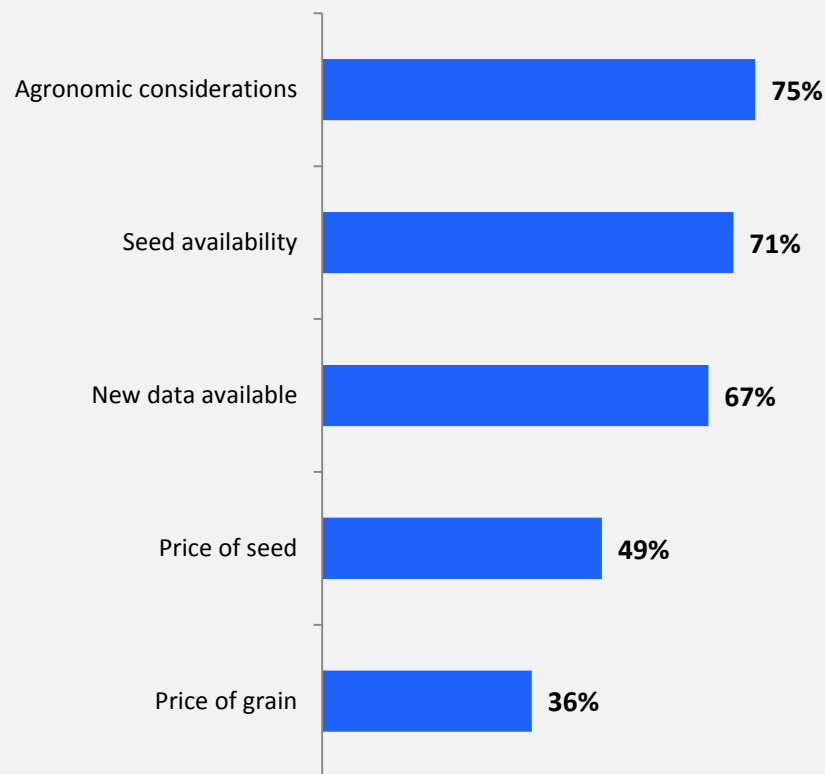
Base: All respondents, n=368.

The top factors that could cause a variety decision change before purchase include new data becoming available (33% ranked first, 67% in top three), seed availability (23% ranked first, 71% in top three), and agronomic considerations (21% ranked first, 75% in top three).

Factors That Could Impact Seed Selection Choice (Ranked First)



Factors That Could Impact Seed Selection Choice (Ranked in Top Three)



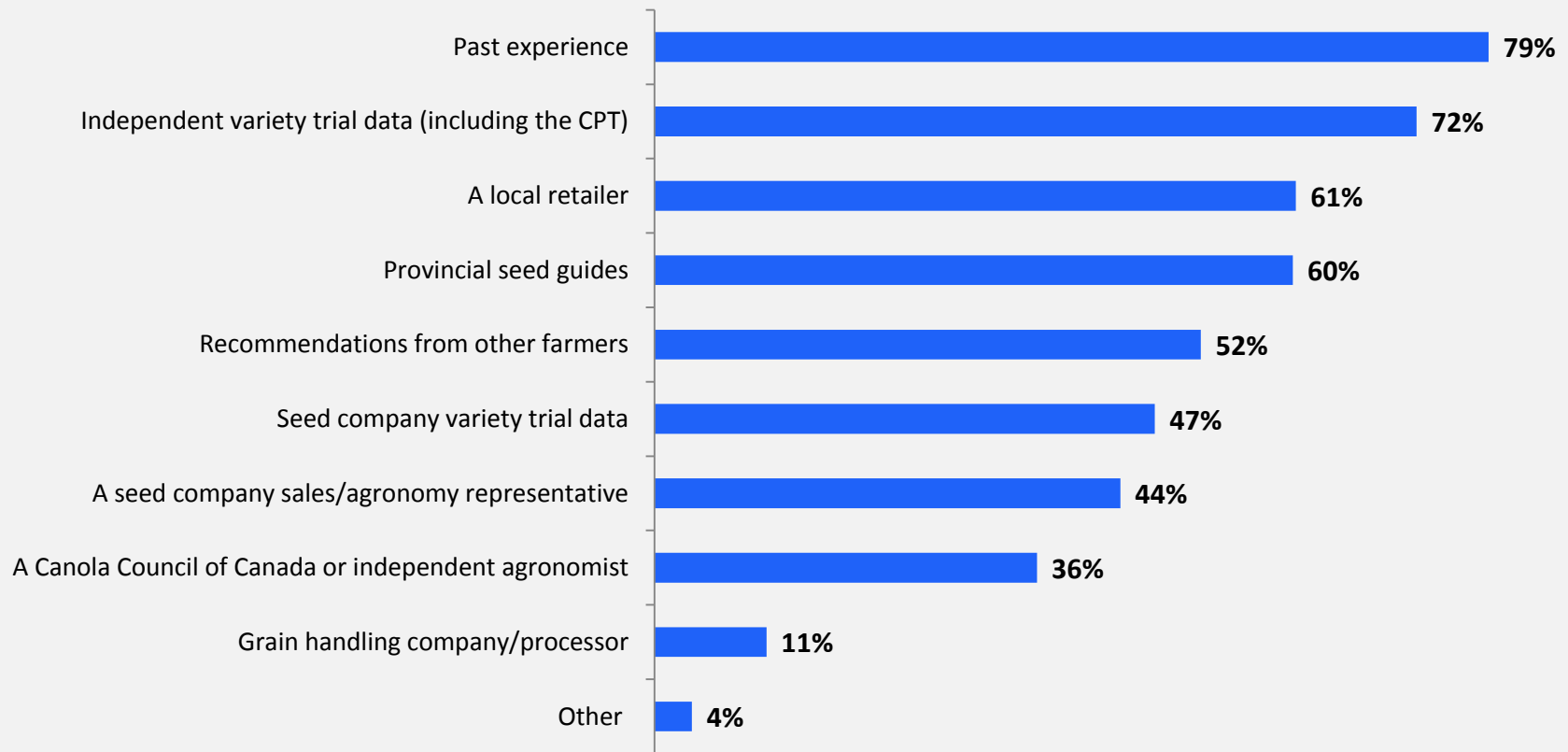
8. In the time between making your initial and final seed selection, what factors would you consider that might cause you to change your mind? Please rank your top three. Base: All respondents, n=368.

Sources of Variety Performance



When making the decision on which canola variety to order for seeding, the top information sources consulted include past experiences (79%) and looking at independent variety trial data, including the CPT (72%).

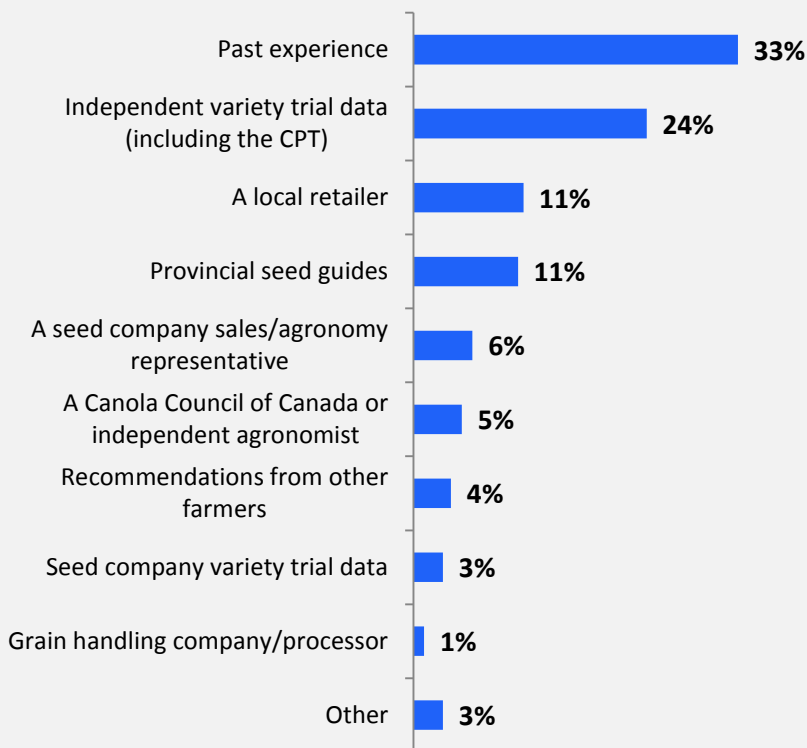
Canola Variety Purchase Decision - Information Sources Consulted



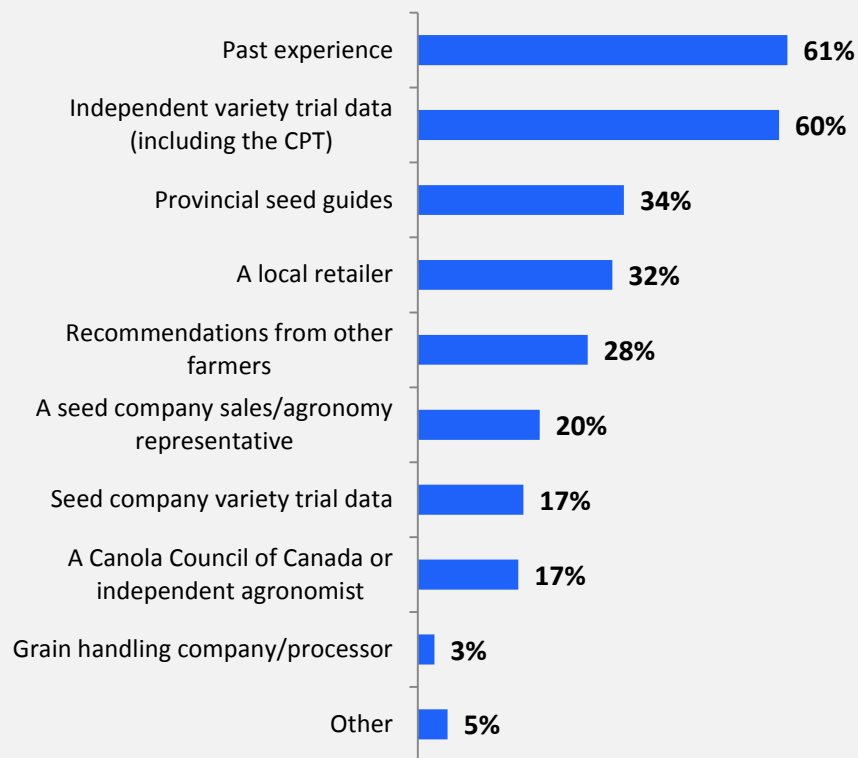
9. When making the decision on which canola variety to order for seeding, which of the following information sources does you normally consult? Please select all that apply.
Base: All respondents, n=368. Multiple answers possible.

When ranking the various sources for choosing a canola variety, past experience (33% ranked first, 60% in top three) and independent variety trial data including the CPT (24% ranked first, 61% ranked in top three) emerge as the most influential.

Most Influential Sources When Choosing a Canola Variety (Ranked First)



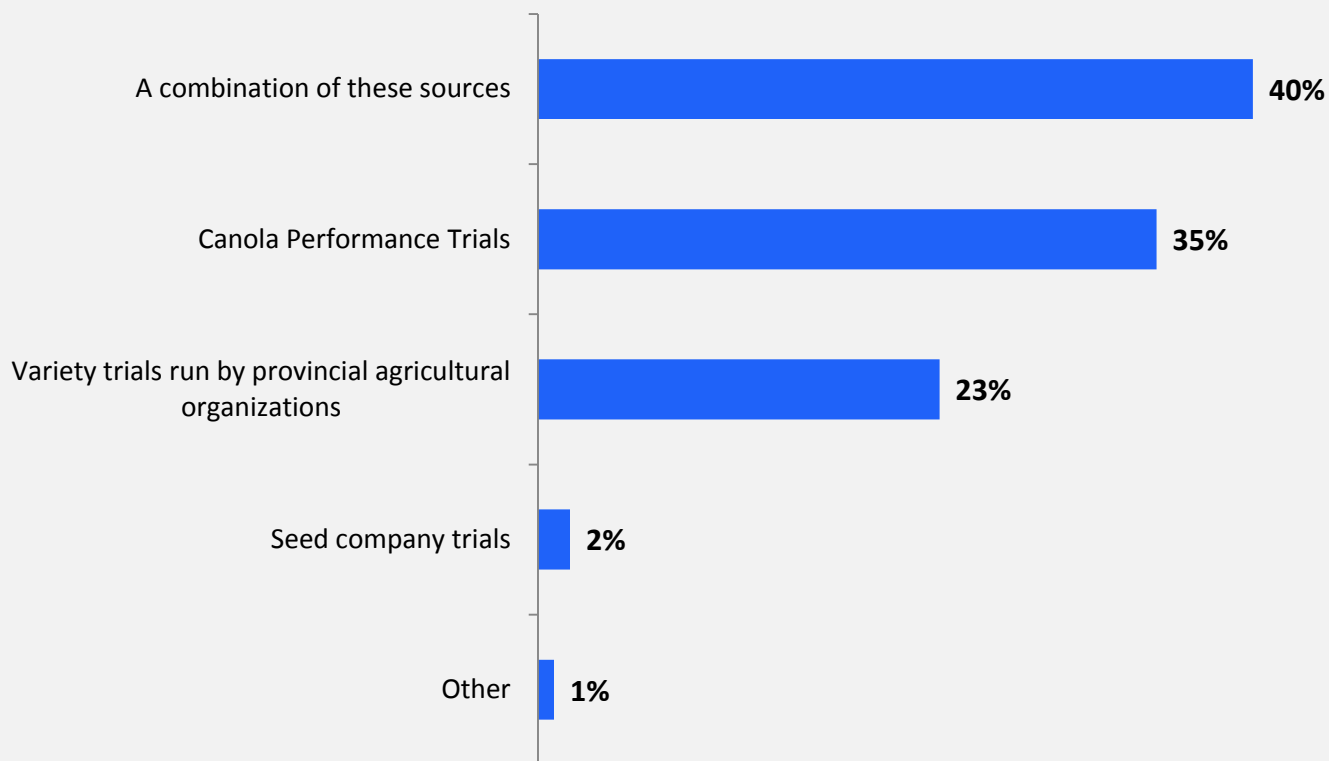
Most Influential Sources When Choosing a Canola Variety (Ranked in Top Three)



10. Which of the following sources do you consider to be the most influential when choosing a canola variety? Please rank them in order of importance. Base: All respondents, n=368.

Those who use provincial seed guides as an information source were asked where they believe the data comes from. Most commonly (40%) it is believed that the information comes from both canola performance trials and variety trials run by provincial agricultural organizations. Just over one-third (35%) believe the data comes exclusively from canola performance trials.

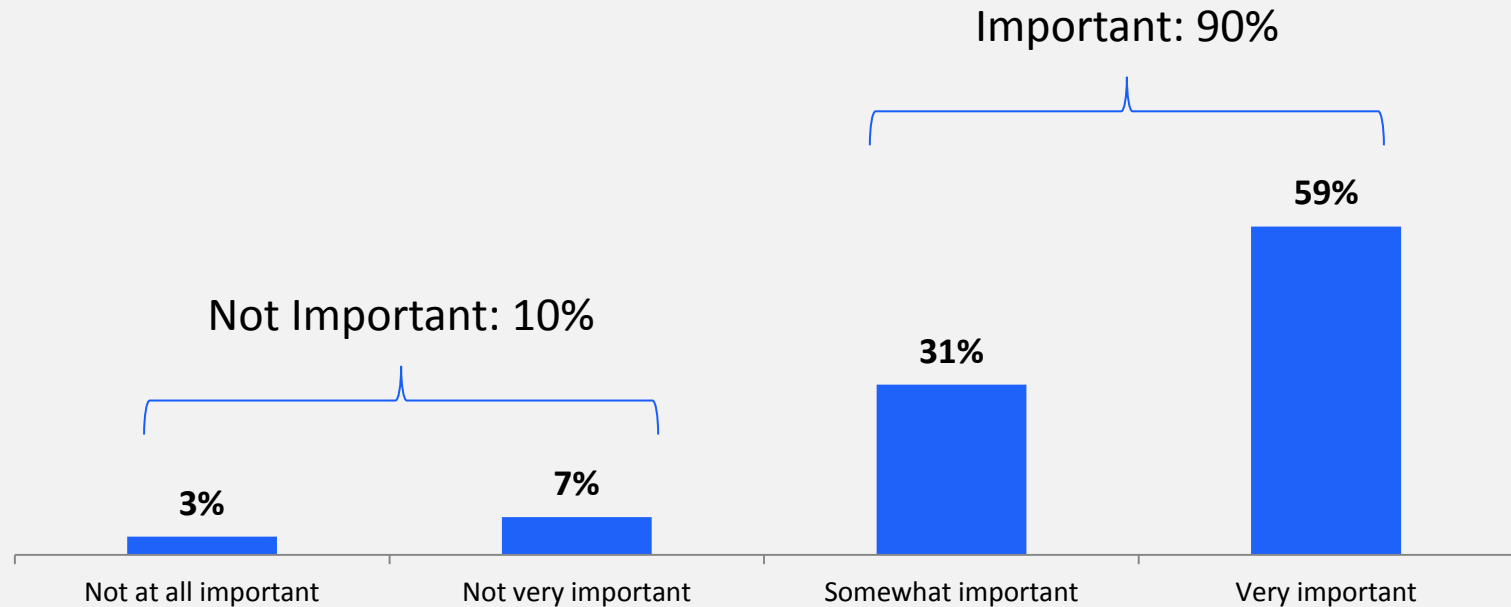
Perceived Origin of Seed Guide Data



11. You indicated that you normally use provincial seed guides as one of your sources of information on canola varieties. To the best of your knowledge, where does the data for the provincial seed guides come from? Base: All respondents that indicated that provincial seed guides are one of their information sources, n=222.

Most (90%) believe that having variety data come from an independent third party is important.

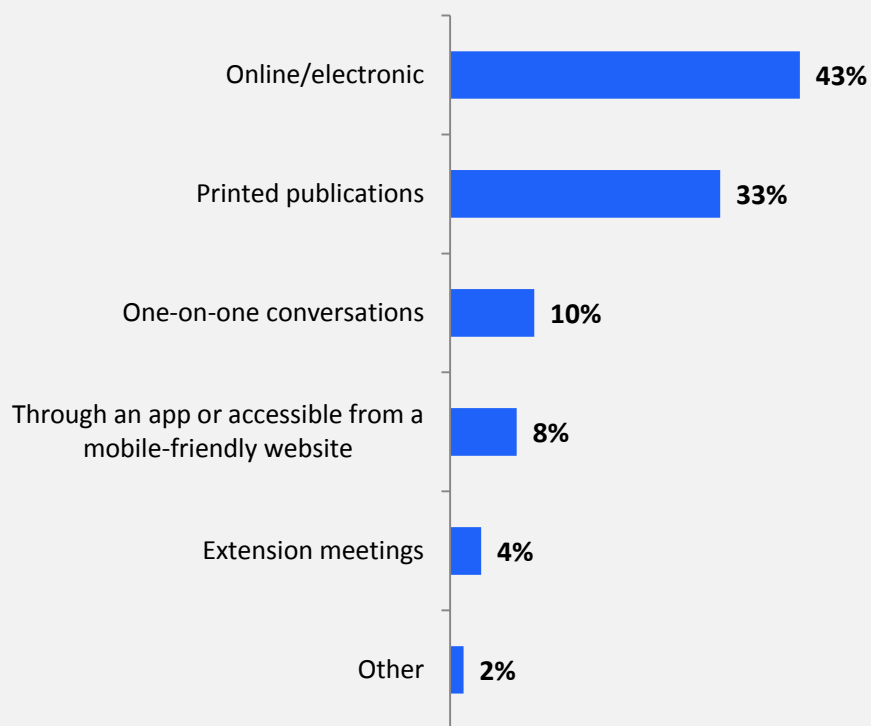
Importance of Variety Data Coming from Independent/Third Party Source



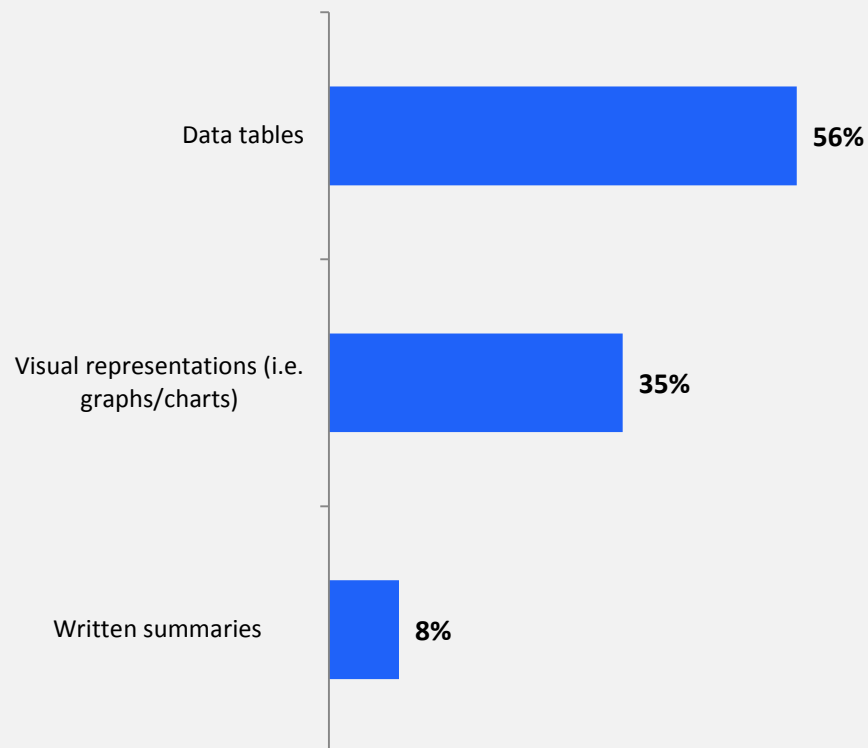
12. When choosing the canola variety to grow on your farm, how important is it to you that variety performance data comes from an independent or third party source?
Base: All respondents, n=368.

The most preferred formats for receiving information about canola varieties are online/electronic (43%) and printed publications (33%). The most useful format for reviewing canola variety information is data tables (56%).

Preferred Format for Receiving Information about Canola Varieties



Most Useful Format for Reviewing Canola Variety Information



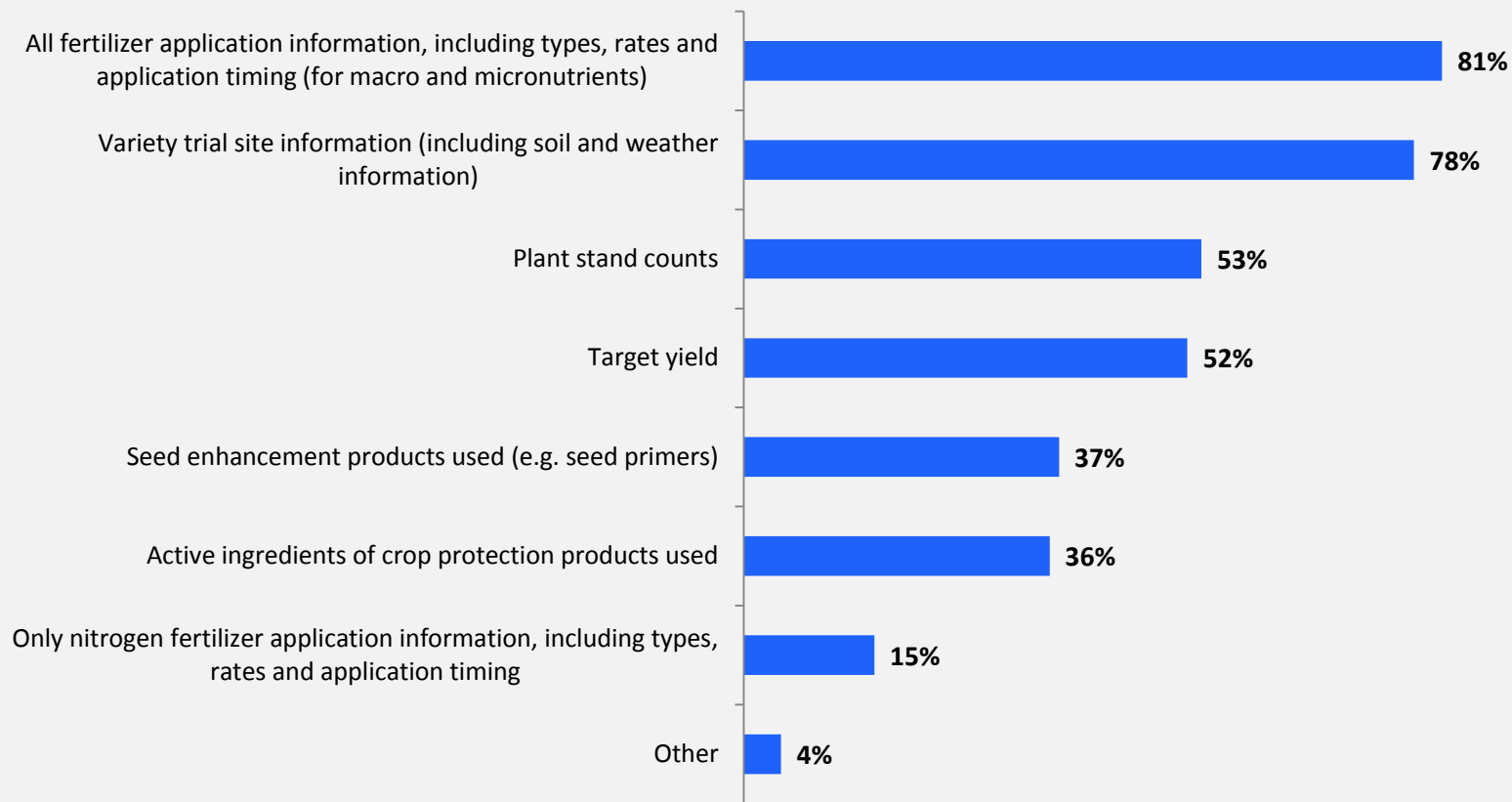
13. Which of the following delivery formats do you prefer most for receiving information about canola varieties?

14. When reviewing information in order to select canola varieties, which format do you find the most useful?

Base: All respondents, n=368.

Aside from data available from canola variety trials, additional information useful in selecting the appropriate variety includes fertilizer application information (81%) and variety trial site information (78%).

Additional Useful Information for Selecting Varieties



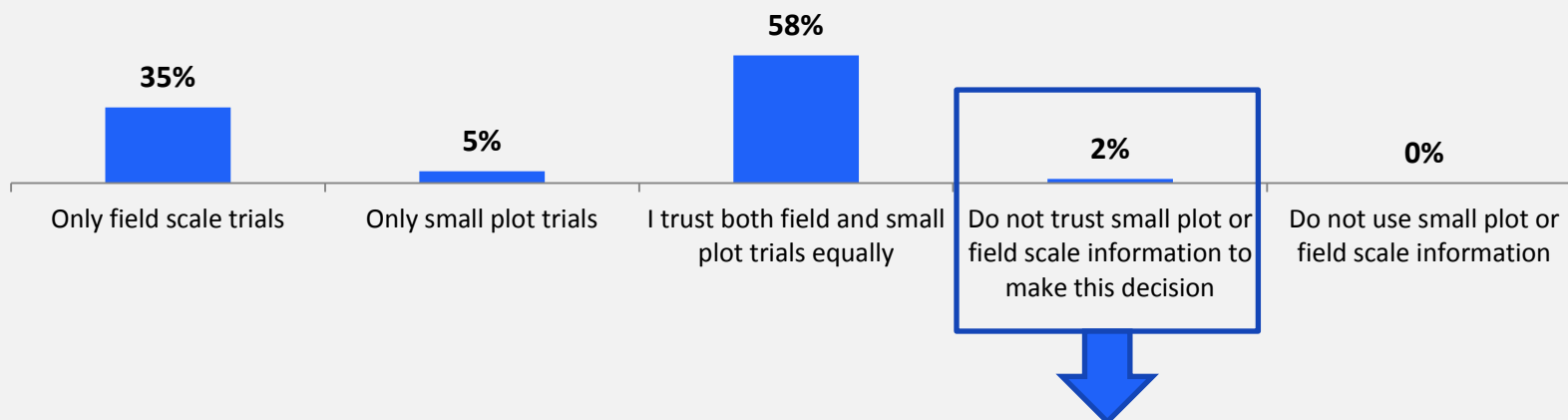
15. In addition to the yield and basic agronomic performance data available on canola variety trials, what additional management, site or other information would help you select the appropriate variety for your farm? Please select all that apply. Base: All respondents, n=368. Multiple answers possible.

Quality of Variety Trial Data



The majority (58%) say they trust both field and small plot trials equally. Another one third (35%) say they only trust field scale trials.

Most Trusted Data Source for Variety Decisions



Reasons for Not Trusting Plot Trial Information

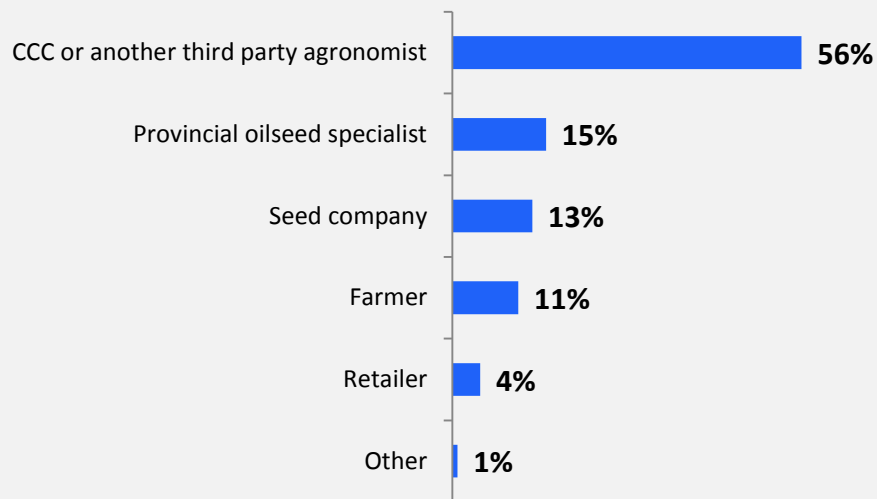
- Just don't base my whole decision on them because my farm may perform differently.
- Just measuring field variability, varieties are all the same.
- Most of the time these trials just show variability in the field, unless they have a check variety and are statistically significant.
- Not sure all information is made available in the reports.
- Plots aren't statistically significant.
- The yield is always higher then the whole field.
- When the seed reps are involved believe no one. Why when doing trials will they not share information? I have done trials with different company's seed in same plot. When combined and weighed they wont tell me or the other reps what it yielded after put in weigh wagon. Have to wait and read about it. Why? They are fixing the numbers.

16. Which data source do you trust most when making variety decisions? Base: All respondents, n=368.

18. Why do you say you do not trust plot trial information? Base: Respondents who say they do not trust plot trial information, n=7.

More than one half (56%) believe the Canola Council of Canada or another third party agronomist should be most involved in conducting small plot variety trials.

Preference For Who Should be Most Involved in Conducting Small Plot Variety Trials (Ranked First)



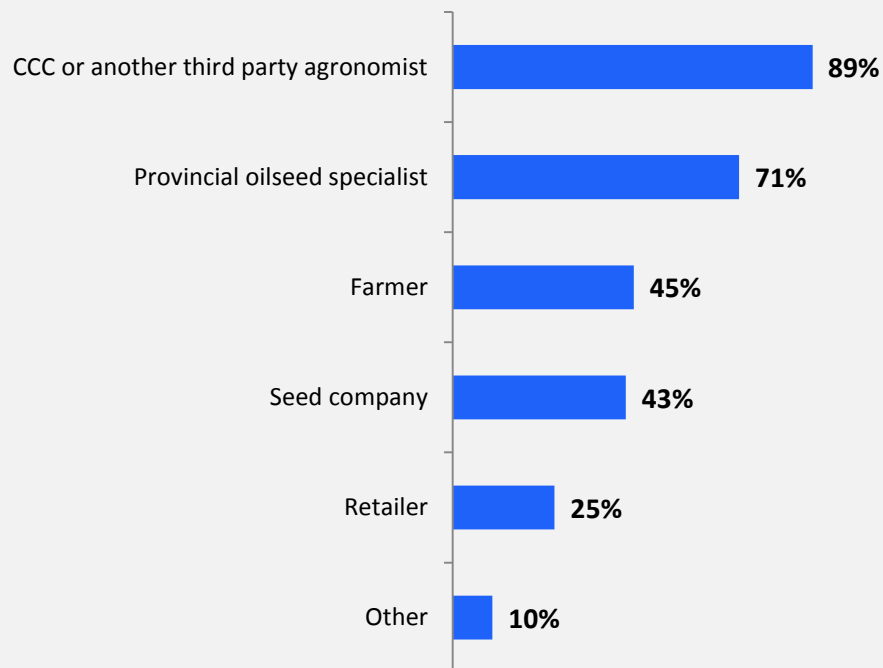
Comments Among Those Ranking "Other" First

A contract research company.

Don't trust small plot so no one.

Local applied research associations.

Preference For Who Should be Most Involved in Conducting Small Plot Variety Trials (Ranked in Top Three)

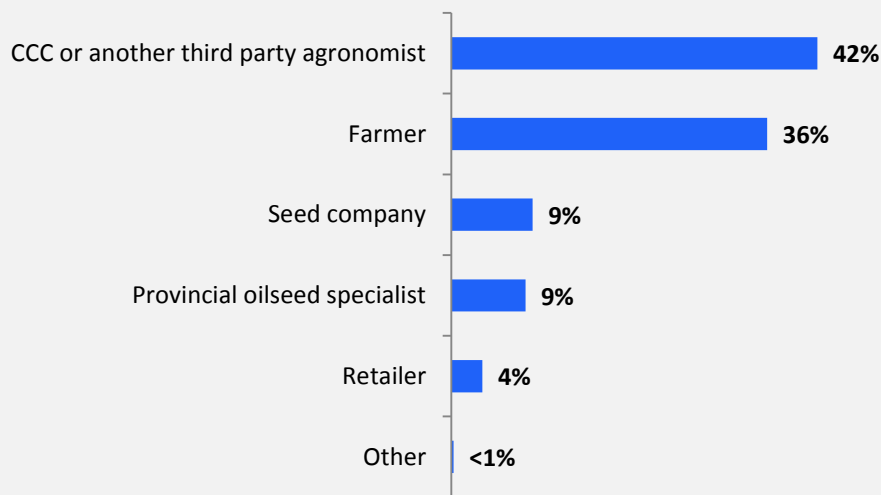


19. Who do you believe should be most involved in conducting small plot variety trials? Please rank the following in order of who you believe should be most involved. Base: All respondents, excluding "don't know", n=358.

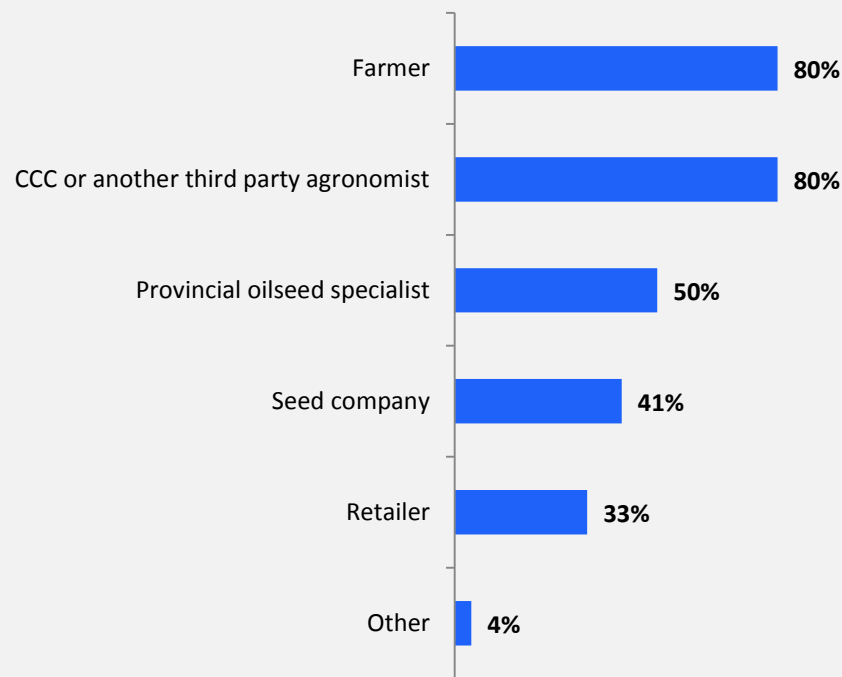
20. You ranked "Other" first. Please elaborate. Base: Respondents who ranked "Other" first, n=3.

The Canola Council of Canada or another third party agronomist (42% ranked first, 80% ranked in top three) and farmers (36% ranked first, 80% ranked in top three) are the top preferences for who should be most involved in conducting field scale variety trials.

Preference For Who Should be Most Involved in Conducting Field Scale Variety Trials (Ranked First)



Preference For Who Should be Most Involved in Conducting Field Scale Variety Trials (Ranked in Top Three)



Comments Among Those Ranking "Other" First

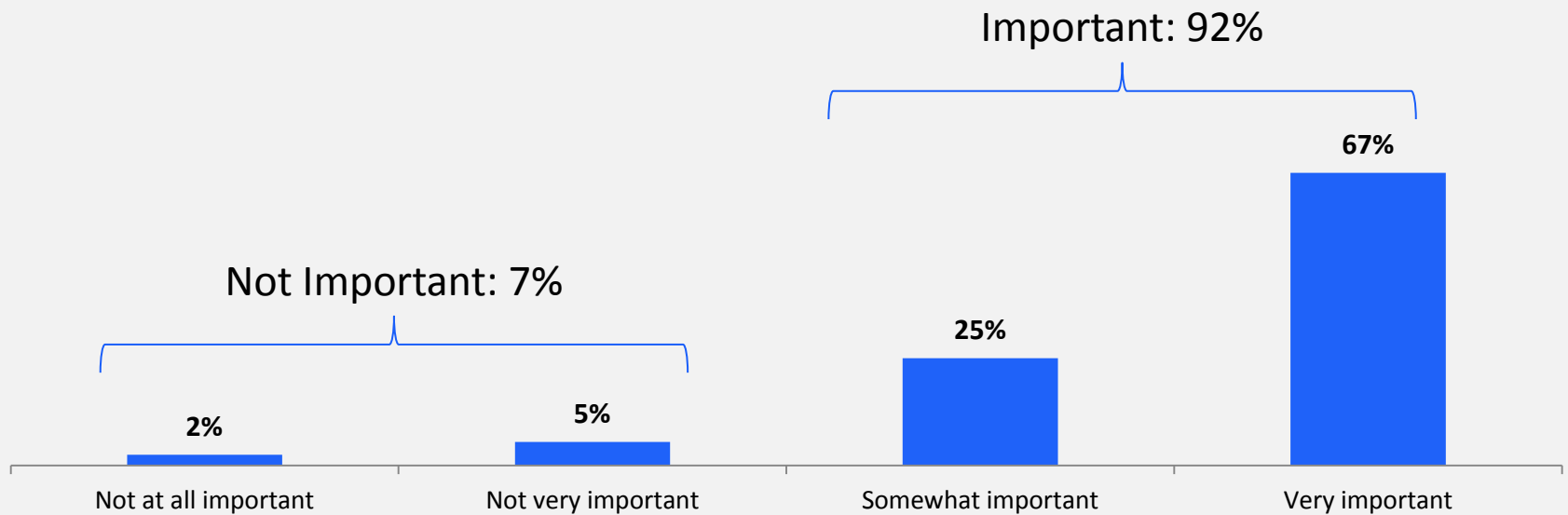
Provincial applied research organizations or private research organizations or even university or agricultural colleges.

21. Who do you believe should be most involved in conducting field scale variety trials? Please rank the following in order of who you believe should be most involved. Base: All respondents, excluding "don't know", n=364.

22. You ranked "Other" first for who should be most involved in conducting field scale trials. Please elaborate. Base: Respondents ranking "other" first, n=1.

Most (92%) say that it is important to view variety trial data from sources other than seed companies.

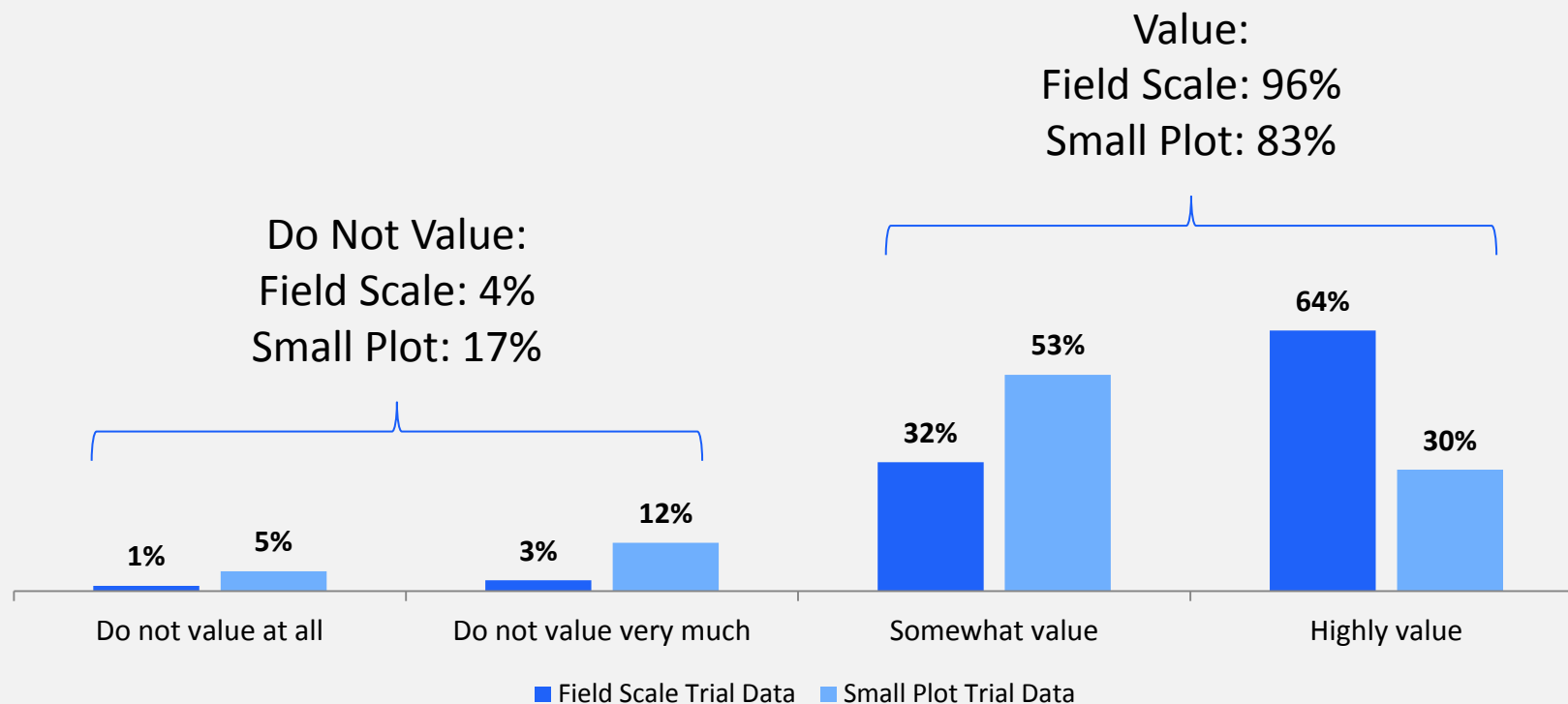
Importance of Viewing Variety Trial Data from Sources other Than Seed Companies



23. How important is it for you to view variety trial data from sources other than seed companies? Base: All respondents, n=368.

Field scale (96%) and small plot (83%) data are both highly valued for evaluating canola varieties.

Value of Data for Evaluating Canola Varieties



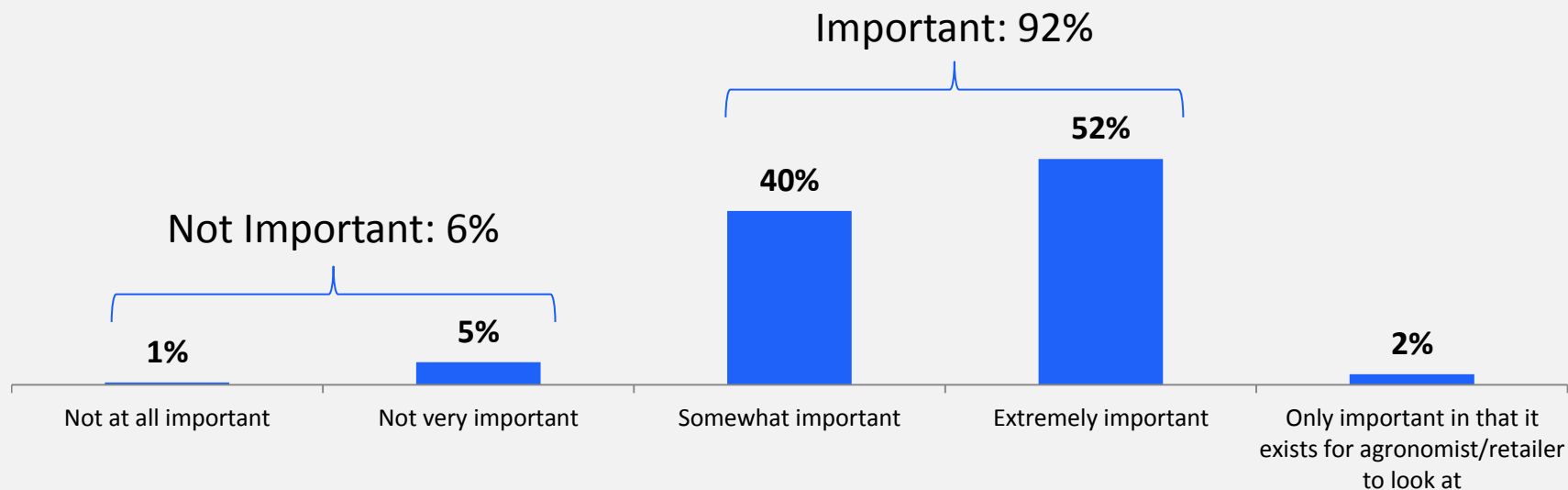
24. To what extent do you value field scale trial data for evaluating canola varieties?

25. To what extent do you value small plot trial data for evaluating canola varieties?

Base: All respondents, n=368.

Most (92%) believe it is important that statistical analysis is used on variety data.

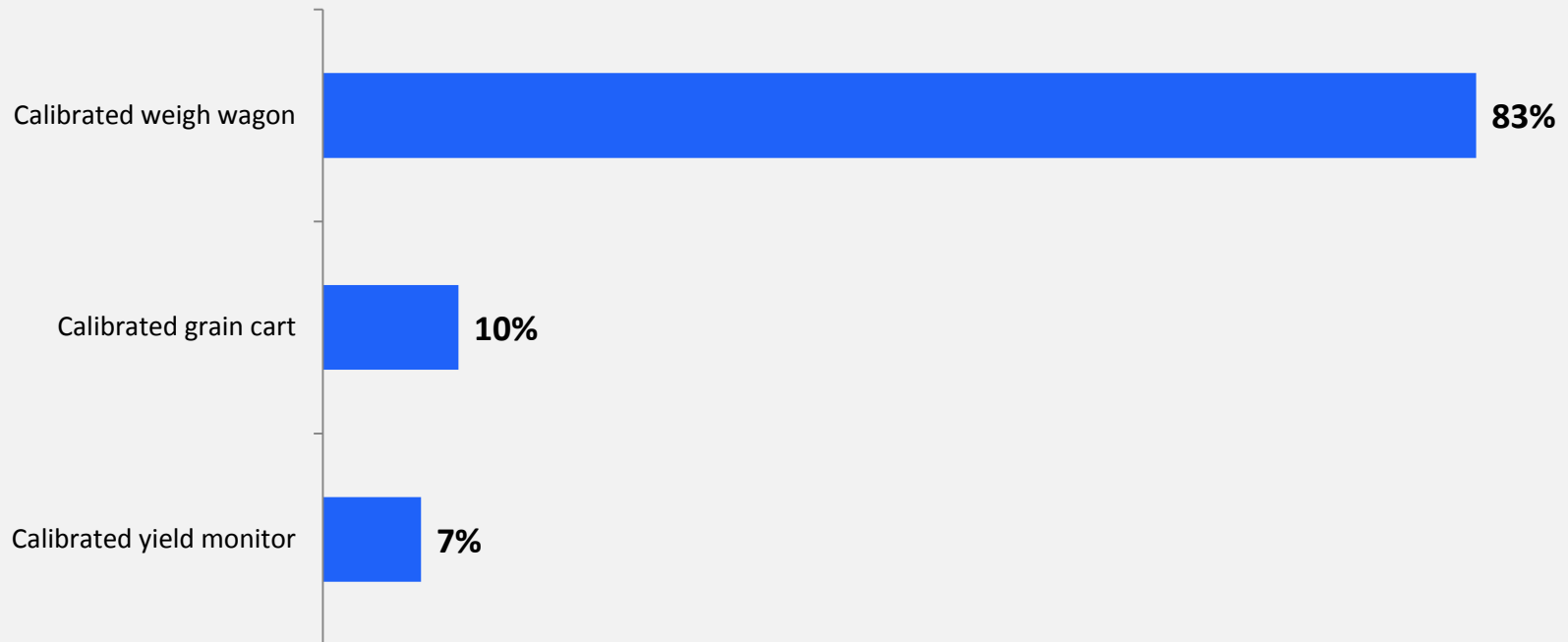
Importance of Statistical Analysis Being Used on Variety Data



26. When considering varieties, how important to you is it that statistical analysis be used on variety data? Base: All respondents, n=368.

Canola growers are most confident with canola yield data coming from calibrated weigh wagons (83% ranked first).

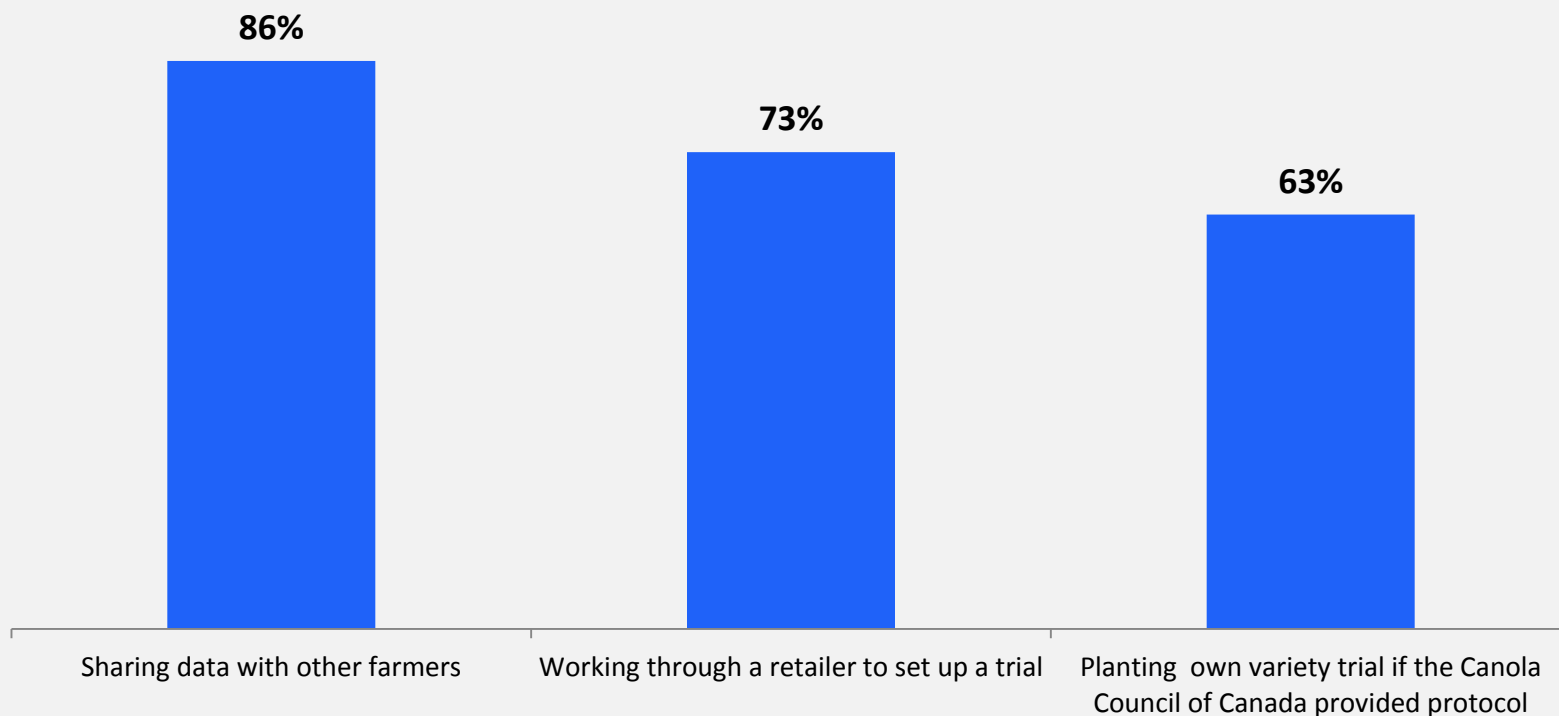
Confidence in Canola Yield Data Coming From... (Ranked First)



27. How would you rank your confidence in the canola yield data coming from each of the following? Base: All respondents, n=368.

The majority would consider sharing data with other farmers (86%) followed by working through a retailer to set up a trial (73%), and planting their own variety trial if provided with protocol (63%).

Would Consider...



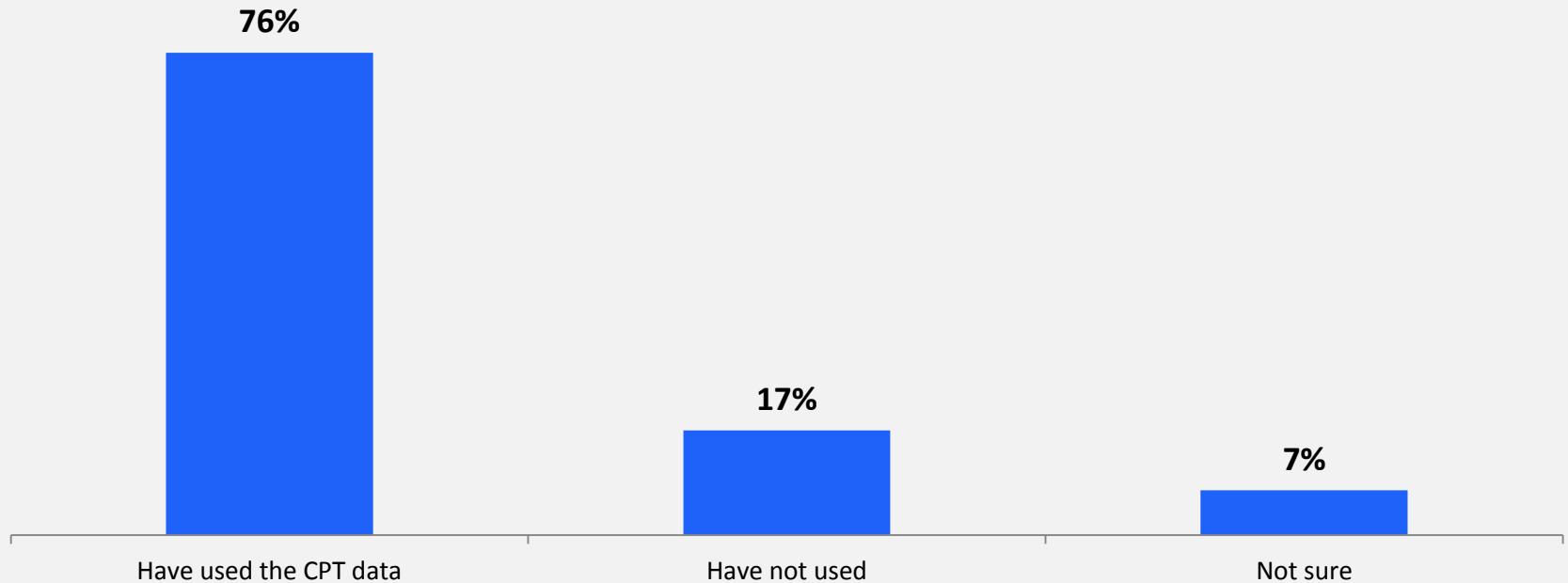
28. Would you consider... Base: All respondents, n=368.

Canola Performance Trials



Just over three quarters (76%) say they have used the canola performance trial data in choosing canola varieties.

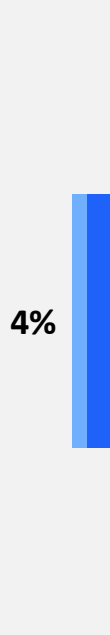
Canola Performance Trials (CPT) Data Usage in Choosing Canola Varieties



29. Do you currently or have you ever used the Canola Performance Trials (CPT) data to choose canola varieties for your farm? Base: All respondents, n=368.

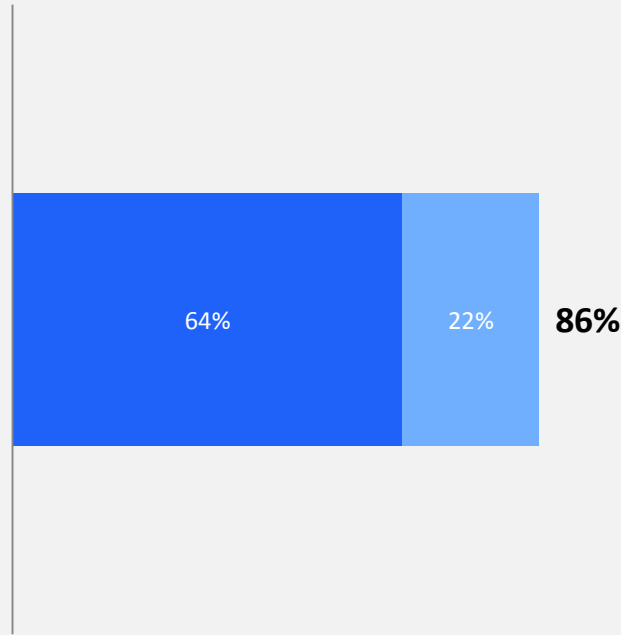
Among those who have used the canola performance trials, satisfaction is high (86% rated overall satisfaction between 7 and 10).

Not Satisfied



Overall Satisfaction

Satisfied



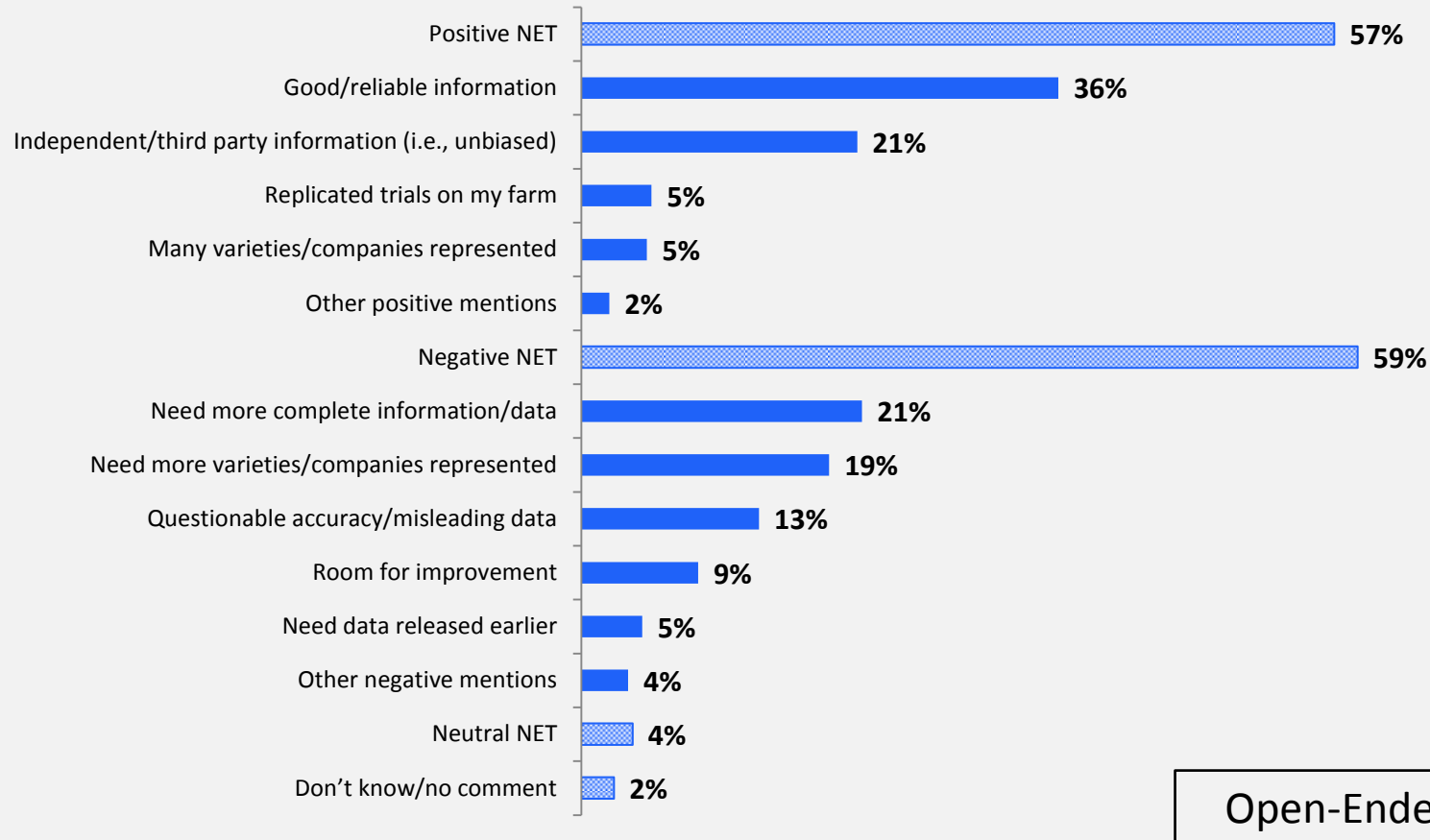
■ 3 or 4 ■ 1 or 2

■ 7 or 8 ■ 9 or 10

30. How do you rate your overall satisfaction with the Canola Performance Trials? Base: All respondents who have used the CPT data, excluding 'don't know/unsure', n=283.

Most commonly, reasons for rating overall satisfaction with the canola performance trials as positive includes that it has good/reliable information (36%) and is done by an unbiased independent third party (21%). Top reasons for dissatisfaction include wanting more complete information (21%) and more varieties/companies in the trials (19%).

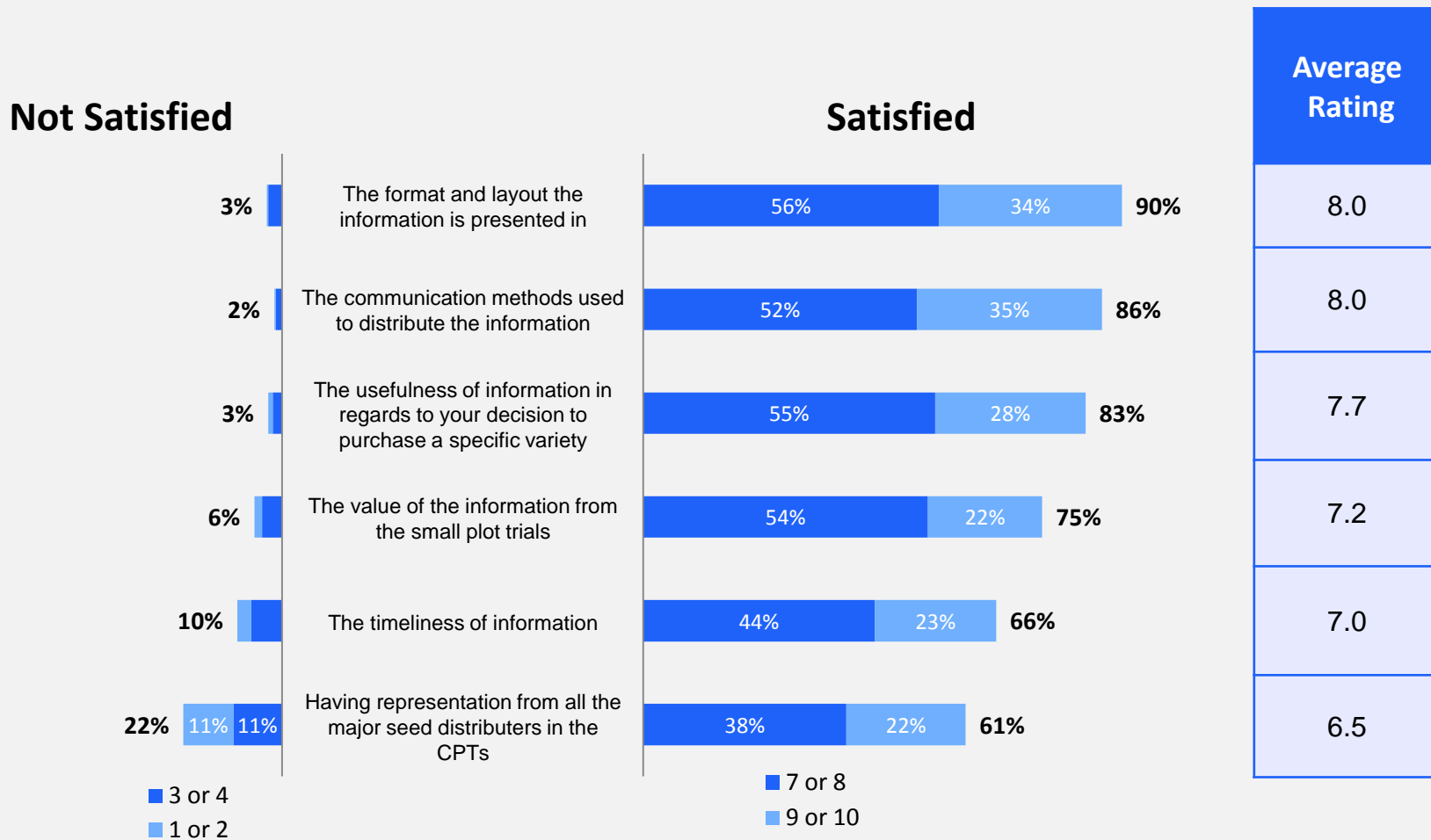
Reasons for Overall Satisfaction with Canola Performance Trials



Open-Ended

31. Why do you rate your satisfaction with the Canola Performance Trials as [Insert from Q30]? Base: All respondents that have used the CPT data and gave an overall satisfaction rating, n=283.

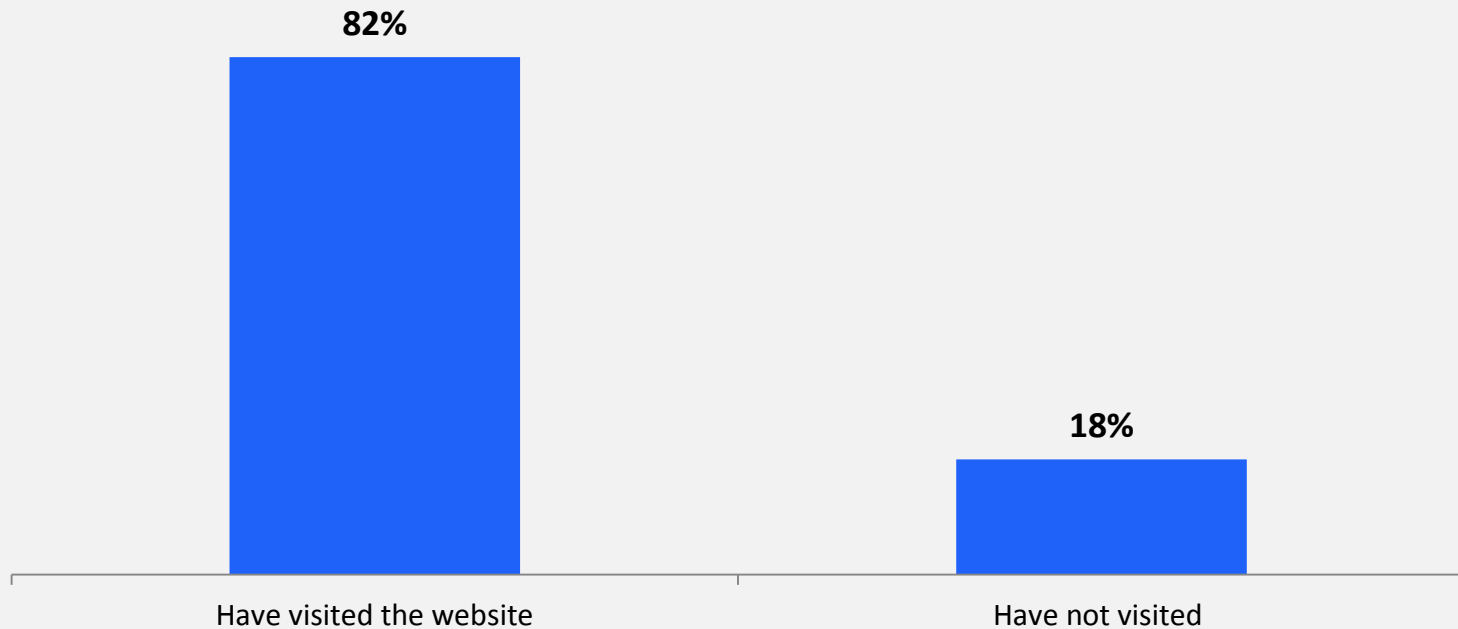
Satisfaction is highest with the format and layout of the information (90% rated 7 to 10), the communication methods used to distribute the information (86% rated 7 to 10), and the usefulness of the information (83% rated 7 to 10). Dissatisfaction is highest with having representation from all the major seed distributors (22% rated 1 to 4).



32. More specifically, how do you rate your satisfaction with the following items related to the Canola Performance Trials?
 Base: All respondents who have used the CPT data, excluding 'don't know', n= 285 to 293.

Most (82%) have visited the Canola Performance Trials Website (www.canolaperformancetrials.com) website.

Canola Performance Trials Website Visitation



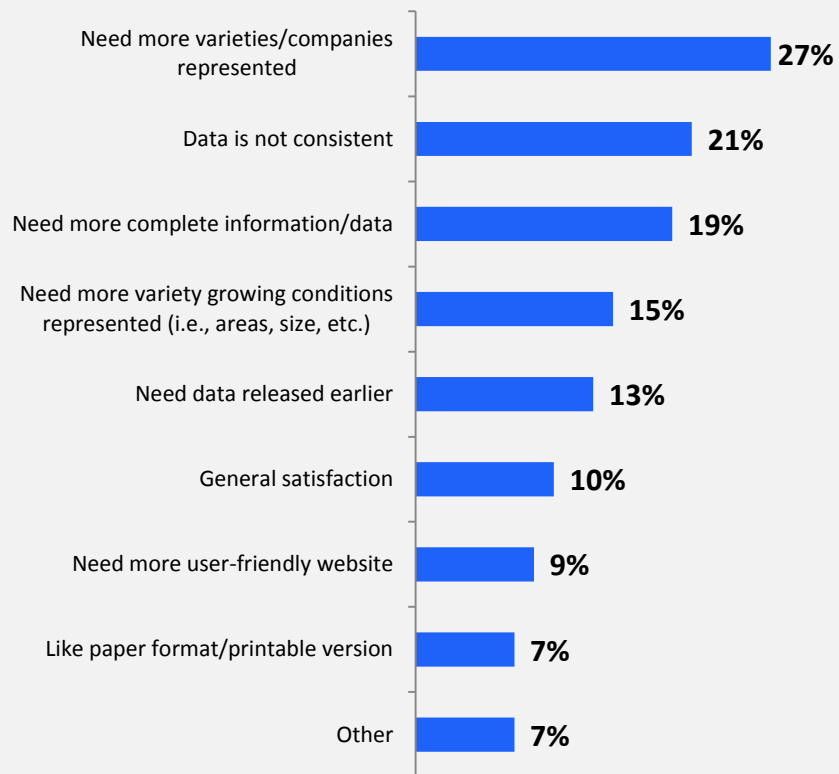
33. Have you ever visited the Canola Performance Trials website (www.canolaperformancetrials.ca)? Base: All respondents, n=368.

Final Comments



Most commonly, those leaving final comments mention they would like more varieties/companies represented in the trials, the data is not consistent, and that they would like more complete information and data.

Final Comments*



It is unfortunate that not all seed companies are choosing to submit entries into CPT. This will influence the program going forward and poses the greatest threat to this initiative.

CPT data are highly variable.

Need to interview trial contractors more fully. Seems like quality data is second to the revenue generation of just harvesting a trial and getting paid. Looking for more reliable and aligned data.

Open-Ended

34. Do you have any further comments about the CPT data, booklet, website, or any of the topics we covered in this survey? Base: All respondents that left comments, n=67.
*Caution is advised in interpreting results due to the smaller base size.