



Environics Communications
CanTrust Index

2017

The second annual study by Environics Communications on trust levels among Canadian consumers

ENVIRONICS
COMMUNICATIONS

What is the CanTrust Index?

The **Environics Communications CanTrust Index** takes a distinctly Canadian approach to measuring and tracking Canadians' trust in organizations, leaders, industries and information sources, and uncovers themes, trends and perspectives that tell us who we are.

The 2017 CanTrust Index examines several Canadian population segments, including New Canadians, and in 2017, we have provided deeper analysis on gender and regional differences.

Who is Environics Communications?

Environics Communications identifies and engages with audiences and influencers to build trust in companies and brands. Environics Communications is a leading Canadian integrated marketing communications agency with approximately 130 team members in offices in Toronto, Ottawa, Montréal and Washington, DC. The **CanTrust Index** is part of our service to our clients on how to win and preserve trust.

This survey demonstrates our commitment to knowing Canadians. The study is an online sample of 1,500 Canadians conducted between January 16 to January 26, 2017. It is nationally representative by region, age and gender.



Executive Summary: Trust

Executive Summary

There is no doubt that recent events in some nations point to waning consumer trust. While our findings overall indicate a slight decline of trust in some areas, our study shows a more positive Canadian story in comparison to global trends.

In the wake of a rise in protectionism and distrust in immigrants in some countries, through the 2017 Environics Communications CanTrust Index, we see a culture where **New Canadians** are driving the optimism of our country, perhaps pointing in turn to a hopeful future for companies and governments seeking to grow consumer trust.

We also find higher levels of trust among women and residents of **Québec**. In contrast, people living in Western Canada are less trusting in several areas we surveyed.

There is not a gap in Canada regarding trust between higher and lower incomes. Canadians with a household income of below \$60,000 are slightly less trusting in only a few areas when compared to those households with income over \$60,000.

Executive Summary

Specific Results:

- ▶ Canadians again place the **highest trust in not-for-profit organizations** in their ability to do what is right for Canada, Canadians and our society. While trust in news media shows a slight decline from last year, it remains the second most trusted category. Large corporations continue to yield the lowest levels of trust from Canadians.
- ▶ **Trust in Mayors and the Prime Minister** remain high, with only Premiers seeing a notable decline. Canadians still believe in our government. Although, we see the effects of relatively low popularity of Premiers Notley and Wynne in this year's results, with Calgarians and Torontonians least likely to trust their Premiers.
- ▶ Similar to last year, familiarity breeds trust. Canadians rank their **CEOs or their most senior boss** as **the most trusted figures** (Mayors are now tied for the same standing). Women scored bosses even higher than the general population.
- ▶ **Trust among New Canadians** in these categories over two years remains high, with notable 2017 trust increases in governments and the Prime Minister.

Executive Summary

- ▶ **Only 13% of Canadians trust Donald Trump** – a new category to this year’s CanTrust Index. In fact, more than half of Canadians rated their trust in him a 1 out of a possible 7 points on the trust scale (53%).
- ▶ **Hospitals and universities/colleges*** are the sectors that yield the highest levels of trust amongst Canadians, followed by retail pharmacies*, and food retailers. Real estate agents/brokers*, social media platforms, and marijuana producers* yield the lowest levels of trust.
 - ▶ There is a small decline in trust in the following industries from 2016: broadcasting, telecommunications/cable television, pharmaceutical, and social media platforms.
 - ▶ The emerging marijuana sector is starting with very low trust levels. Fifty-one per cent of Canadians report trusting drug and pharmacy chains to sell or distribute marijuana, compared to only 21% who trust independent storefronts. Two-fifths of Canadians do not trust neither government nor businesses to set the price on medical marijuana.
 - ▶ Respondents in Ontario have less trust in a wide range of brands, while New Canadians and Quebecers have more trust.

* New categories of study in 2017 CanTrust Index

Executive Summary

- ▶ Canadians are placing more importance on various aspects of companies / organizations in order to place their trust in them.
 - ▶ A higher proportion of women place importance on job creation, open and accessible communication, Canadian-owned companies, and support for charitable organizations. We see Canadians are placing increasing importance on these areas compared to 2016.
- ▶ Similar to last year, **Canadians trust product / service sampling or word-of-mouth the most**, followed by traditional editorial content (e.g. newspapers).
 - ▶ Trust in editorial content (traditional and online) has increased slightly.
 - ▶ Trust in traditional advertising increases from last year as well (+6), while we see a decline in levels of trust for consumer opinion/reviews (-4), as well as blogs from bloggers people follow (-5).
 - ▶ New Canadians, women and Quebecers are more likely to trust a wide range of information sources, and Canadians in Vancouver are more likely not to trust in a range of information sources.
- ▶ When online, **search engines** and **traditional news websites are cited as Canadians' preferred sources** to receive news.
- ▶ Seven-in-ten Canadians report that reading online reviews or comments do impact their decision-making process when buying products/services.

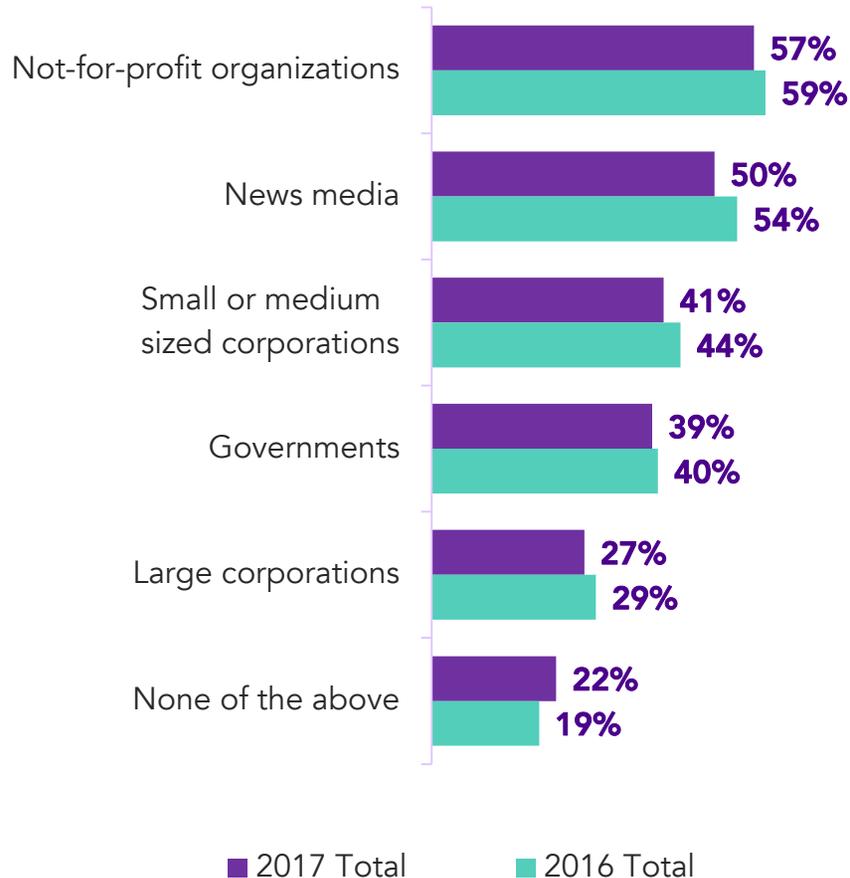
Results



Trust in Organizations and Public Figures

Not-for-profits and news media yield highest levels of trust in Canadians

Trust in Organizations



Key Highlights

- ▶ Slight decline in 2017 across the board from 2016
- ▶ Canadians who place their trust in news media to do the right thing for Canada are more likely to be older (52%), native French speakers (61%), and live in Québec (60%).
- ▶ Younger respondents are more likely to trust small or medium sized corporations.
- ▶ Women are more likely than men to trust not-for-profit organizations.

Trust Index 2017: 43
Trust Index 2016: 45

n=1500

6. Please rank the following categories of organizations for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q9 2016)

Quebecers have more trust in organizations to do what is right

- ▶ There is a lower proportion of Canadians in Calgary that trust the organizations listed to do what is right for Canada, specifically regarding their trust in government bodies, yielding the lowest trust index score.
- ▶ Quebecers, especially those in Montréal, place more trust in news media, and large corporations than the average Canadian.

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Not-for-profit organizations	57%	55%	55%	60%	65%	51%	53%	56%	55%	61%
News media	50%	45%	47%	60%	53%	43%	39%	43%	49%	58%
Small or medium sized corporations	41%	40%	34%	55%	37%	40%	43%	35%	32%	48%
Governments	39%	36%	41%	46%	34%	43%	37%	28%	43%	43%
Large corporations	27%	25%	22%	41%	19%	29%	29%	21%	27%	36%
None of the above	22%	25%	25%	16%	15%	28%	24%	31%	26%	18%
TRUST INDEX	43	40	40	52	42	41	40	37	41	49

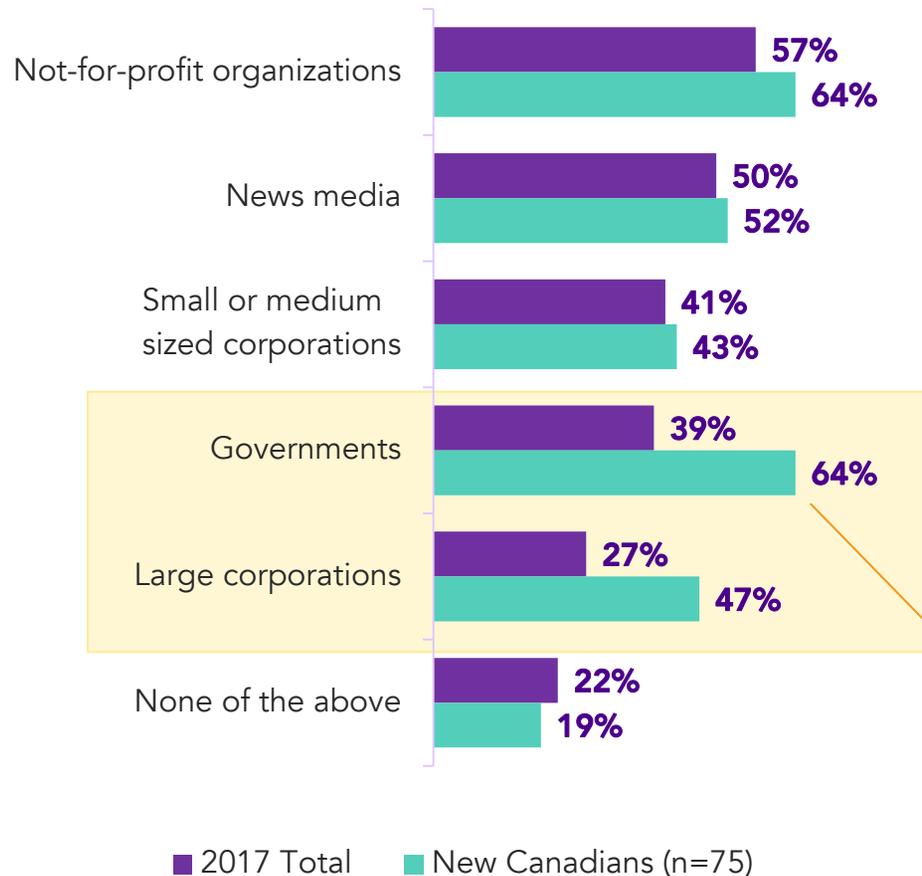
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n=1500

6. Please rank the following categories of organizations for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q9 2016)

New Canadians more likely to trust the government than the general population

Trust in Organizations



Key Highlights

- ▶ New Canadians' trust is growing.
- ▶ New Canadians are more likely to trust governments and large corporations than the general population in Canada.
- ▶ In addition, there is an increased proportion of trust, even within New Canadians, in our governments (as compared to 2016).

Trust Index 2017 Total: 43
 Trust Index 2017 New Canadians: 54
 Trust Index 2016 New Canadians: 46

New Canadians T3B (Top three boxes)
 Trust in Governments (2016): 46%

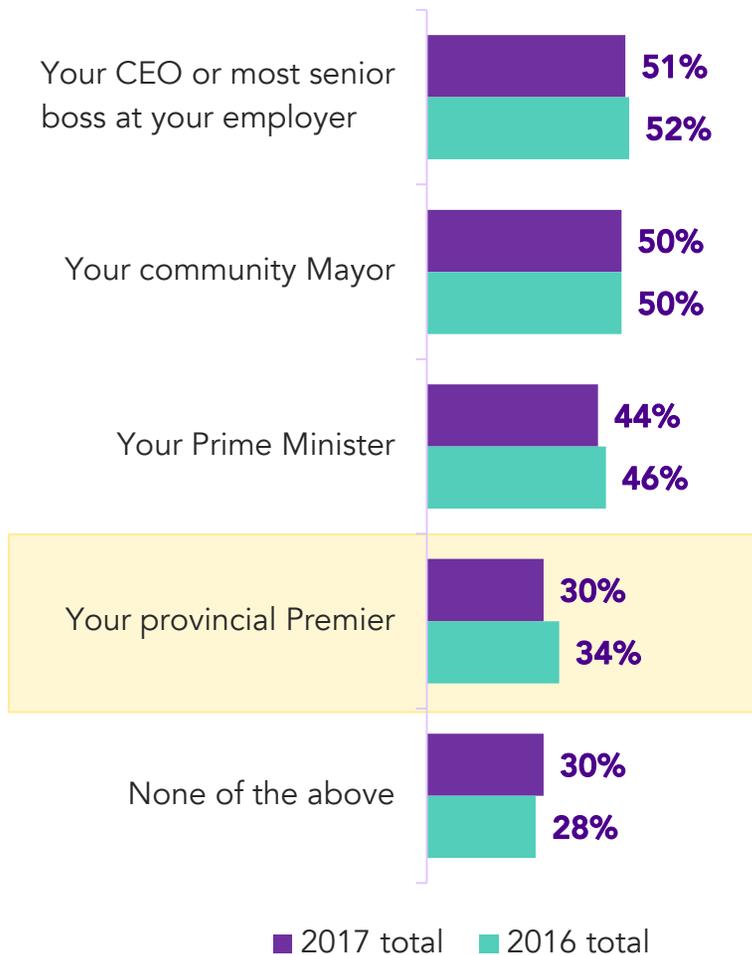
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6. Please rank the following categories of organizations for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q9 2016)



CEO and local mayor continue to yield highest levels of trust

Trust in Public Figures



Key Highlights

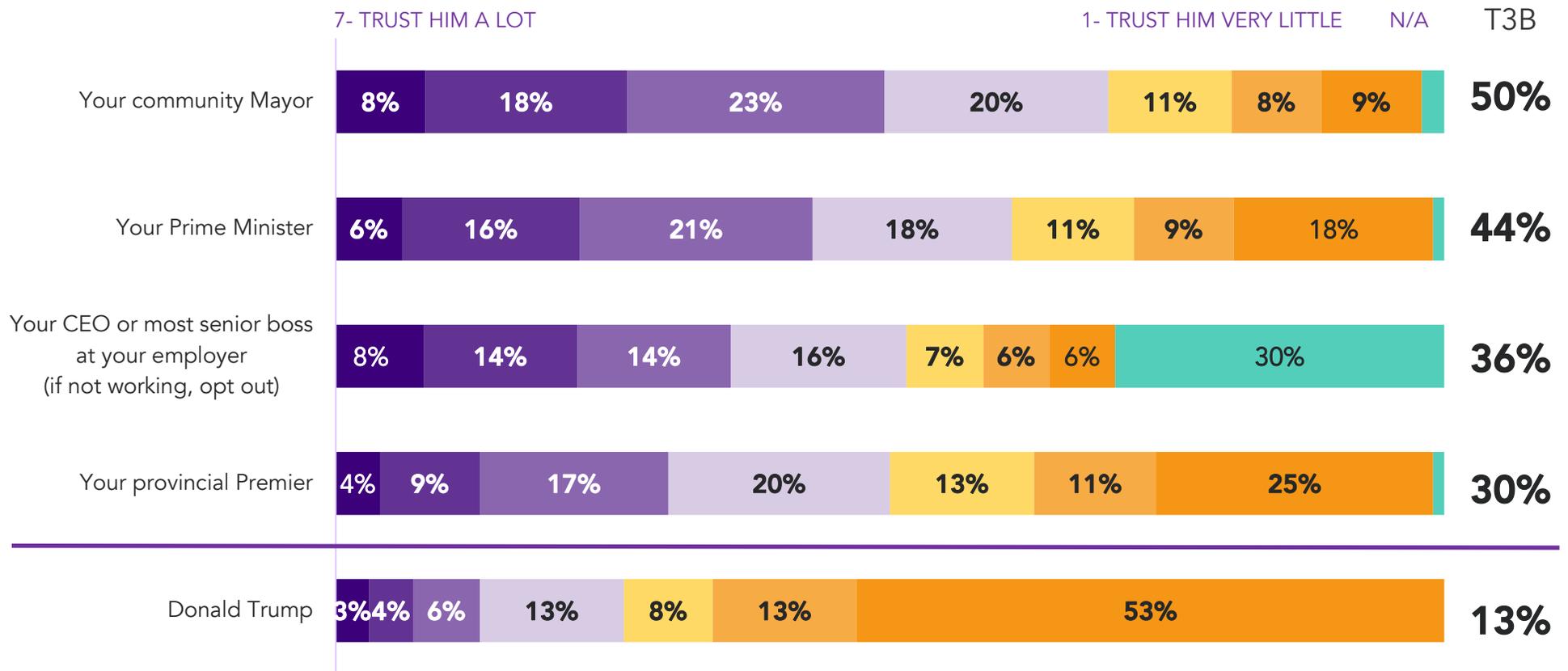
- ▶ There is a lower proportion of Canadians that trust their provincial Premier.
- ▶ Married Canadians (53%), those who own their home (52%), higher HHI earners (\$100k-\$150k, 56%), daily Facebook users (52%), daily Google+ users (55%) and native French speakers (56%) are more likely to trust their community mayor.

n=1500

7. Thinking about Canada and the province and city you live in, please rank the people in each role according to where you live for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* . ****Note-CEO item manually re-based to exclude N/A.** (Q.10 2016)

More than half of Canadians trust Donald Trump very little

- ▶ Canadians who mistrust Trump are more likely to trust the Prime Minister (47%).



n=1500

7. Thinking about Canada and the province and city you live in, please rank the people in each role according to where you live for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.*
 *Note: full scale shown. Not re-based. (Q.10 2016)

12. Thinking about U.S. President-Elect/President Donald Trump, please rate how much you trust President-Elect/ President Trump and his policies and actions to have a positive impact on people and societies in the United States and Canada and the working relationship between the two countries, using a seven point scale, where '1' is trust very little and '7' is trust him a lot. *Select one response*



Ontarians more likely to trust Trudeau

- ▶ Ontarians and those in Atlantic Canada are more likely to trust Justin Trudeau, while those in Western Canada, specifically Edmonton and Calgary are less likely to trust him. In fact, 49% of those in Edmonton and 58% of those in Calgary mistrust Trudeau (rate 1-3 out of 7).
- ▶ Calgarians are also more likely to mistrust their Premier (61%), as do those living in Ontario (55%), men (53%) and those aged 50+ (53%).

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Your CEO or most senior boss at your employer (if not working, opt out)	51%	56%	46%	45%	57%	50%	53%*	62%	48%	44%
Your community Mayor	50%	48%	50%	52%	55%	38%	52%	55%	49%	49%
Your Prime Minister	44%	37%	49%	45%	56%	42%	29%	27%	48%	51%
Your provincial Premier	30%	33%	26%	30%	31%	34%	35%	21%	28%	32%
None of the above	30%	30%	31%	31%	20%	34%	34%	29%	29%	28%
Donald Trump	13%	16%	13%	8%	8%	13%	17%	16%	15%	6%



=significantly higher than average



=significantly lower than average

n=1500

7. Thinking about Canada and the province and city you live in, please rank the people in each role according to where you live for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each. **Note-CEO item manually re-based to exclude N/A. (Q.10 2016) *low base*

12. Thinking about our American neighbours please rank how much you trust President Donald Trump to do what is right for the United States, Americans and U.S society, using a seven point scale, where '1' is trust very little and '7' is trust him a lot.

Women more likely to trust Trudeau; men more likely to trust Trump

- ▶ Half of Canadians trust their mayor and their CEO.
- ▶ While only a small proportion of Canadians actually report trusting Trump, men are more likely to trust him.
- ▶ Women are more likely to trust the CEO at their organization.

	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
Your CEO or most senior boss at your employer (if not working, opt out)	51%	57%*	50%	51%	47%	54%
Your community Mayor	50%	43%	48%	52%	47%	52%
Your Prime Minister	44%	51%	42%	44%	40%	46%
Your provincial Premier	30%	40%	30%	29%	30%	31%
None of the above	30%	22%	31%	29%	32%	28%
Donald Trump	13%	12%	13%	13%	18%	8%



=significantly higher than average



=significantly lower than average

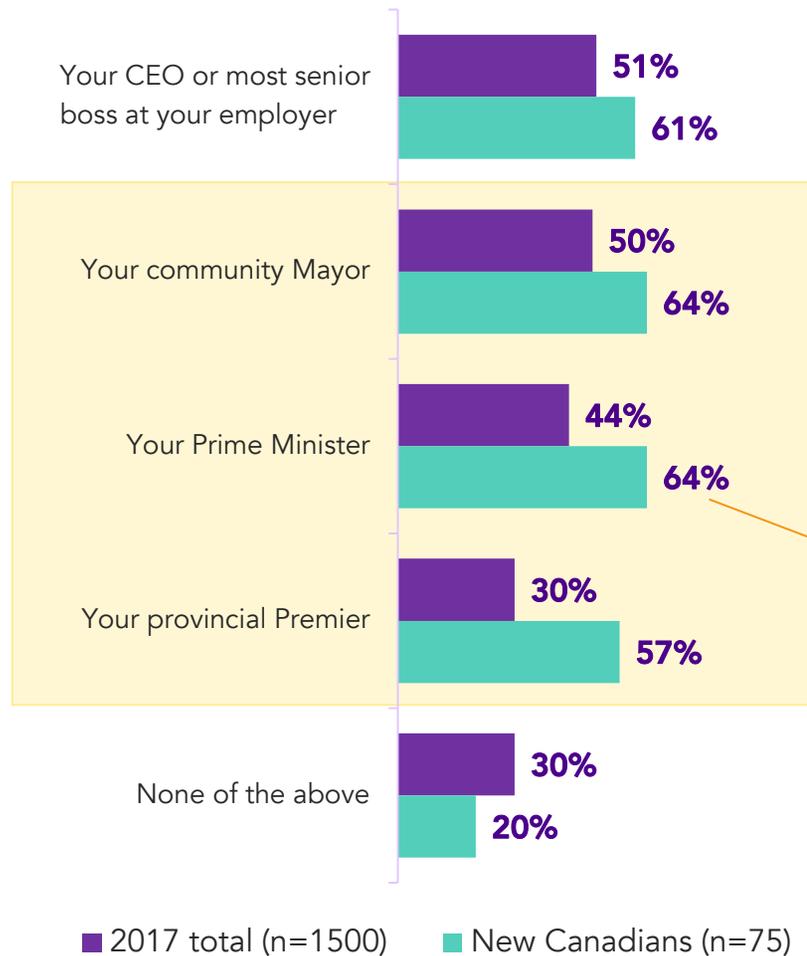
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7. Thinking about Canada and the province and city you live in, please rank the people in each role according to where you live for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each. **Note-CEO item manually re-based to exclude N/A. (Q.10 2016) *low base*

12. Thinking about our American neighbours please rank how much you trust President Donald Trump to do what is right for the United States, Americans and U.S society, using a seven point scale, where '1' is trust very little and '7' is trust him a lot.

New Canadians more likely to trust leaders from all levels of government

Trust in Public Figures



Key Highlights

- ▶ New Canadians are more likely to trust public leaders in all levels of government than the general population.
- ▶ In addition, New Canadians today are more likely to trust the Prime Minister than last year.

New Canadians T3B Trust in the Prime Minister (2016): 47%

n=1500

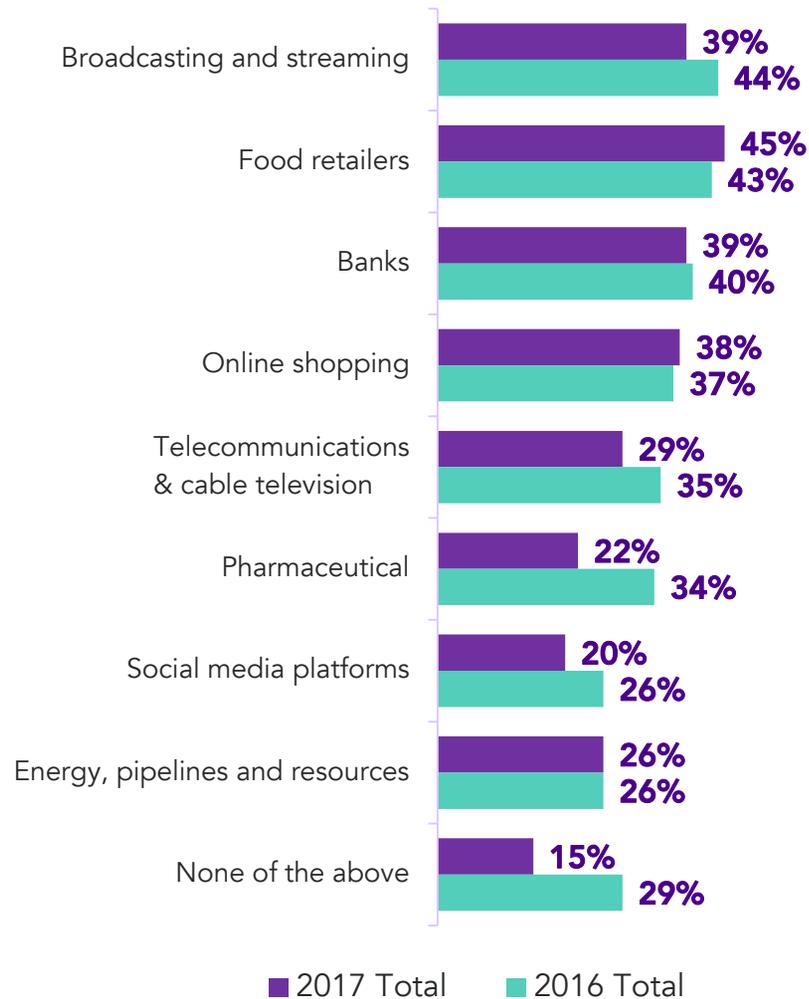
7. Thinking about Canada and the province and city you live in, please rank the people in each role according to where you live for how much you trust them to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q.10 2016) .

***Note-CEO item manually re-based to exclude N/A. Low base warning for New Canadians on CEO question.*

Trust in Industry Sectors

Lower levels of trust in many industries, except trust in food retailers is growing

Trust in Industry



Key Highlights

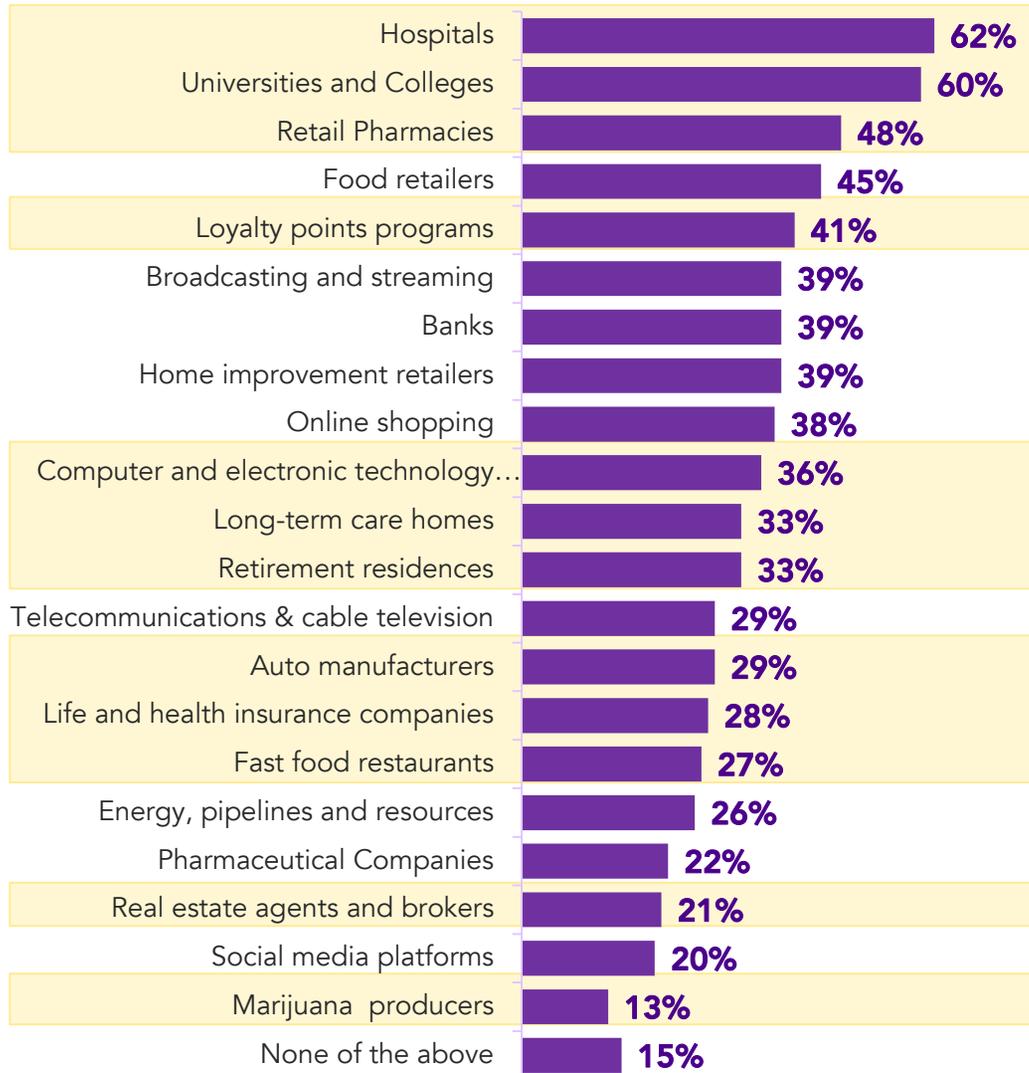
- ▶ Canadians who trust the broadcasting/streaming industry are more likely to be from Québec (49%), and native French speakers (49%).
- ▶ Those who report trusting the telecommunications/cable industry are more likely to be from Québec (34%), native French speakers (37%), retired (33%), and own a home (30%).
- ▶ Those who trust pharmaceutical companies are more likely to be earning \$75k-\$100k HHI (29%).
- ▶ Those who trust social media platforms are more likely to be from Québec (26%), aged 18-24 (32%).

n=1500

8. Please rank the following industry categories for how much you trust companies within these industries to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.*(Q11 2016). Note* the lower proportion falling into 'none of the above' is likely due to change in number of industries, rather than a higher proportion of Canadians who trust.

Hospitals and universities/colleges yield highest levels of trust among Canadians

Trust in Industry



Key Highlights

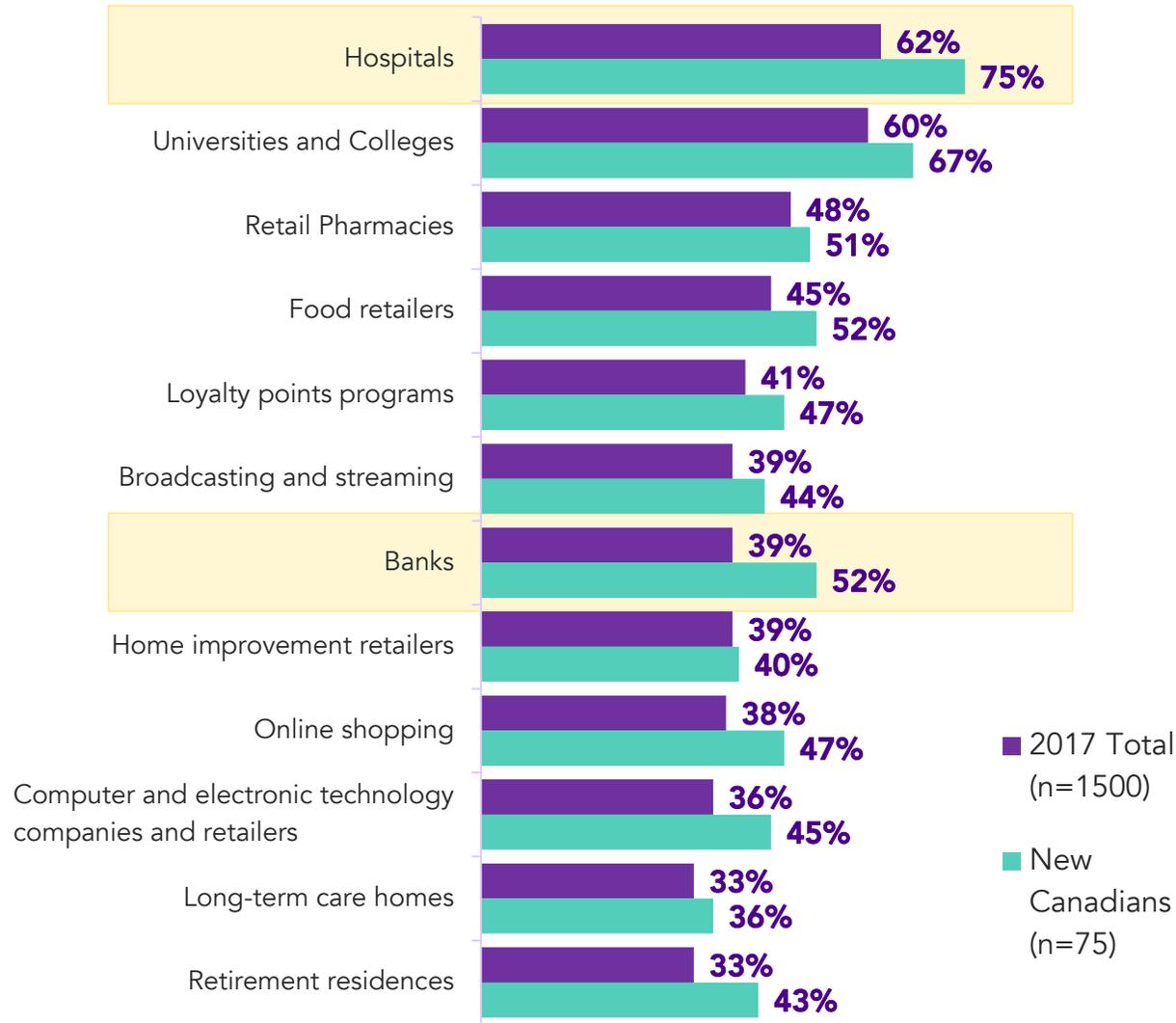
- ▶ We added new industry sectors this year (see yellow boxes).
- ▶ Married respondents are more likely to trust hospitals (65%), banks (41%), retirement residences (35%), the energy industry (29%), auto manufacturers (32%), fast food restaurants (29%), real estate agents (24%), and home improvement retailers (42%).
- ▶ Retired Canadians are more likely to trust hospitals (67%), retail pharmacies (54%), banks (44%), life/health insurance companies (35%), and telecommunication companies (33%).

n=1500

8. Please rank the following industry categories for how much you trust companies within these industries to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q11 2016)

New Canadians place more trust in hospitals and banks than general public

Trust in Industry



Key Highlights

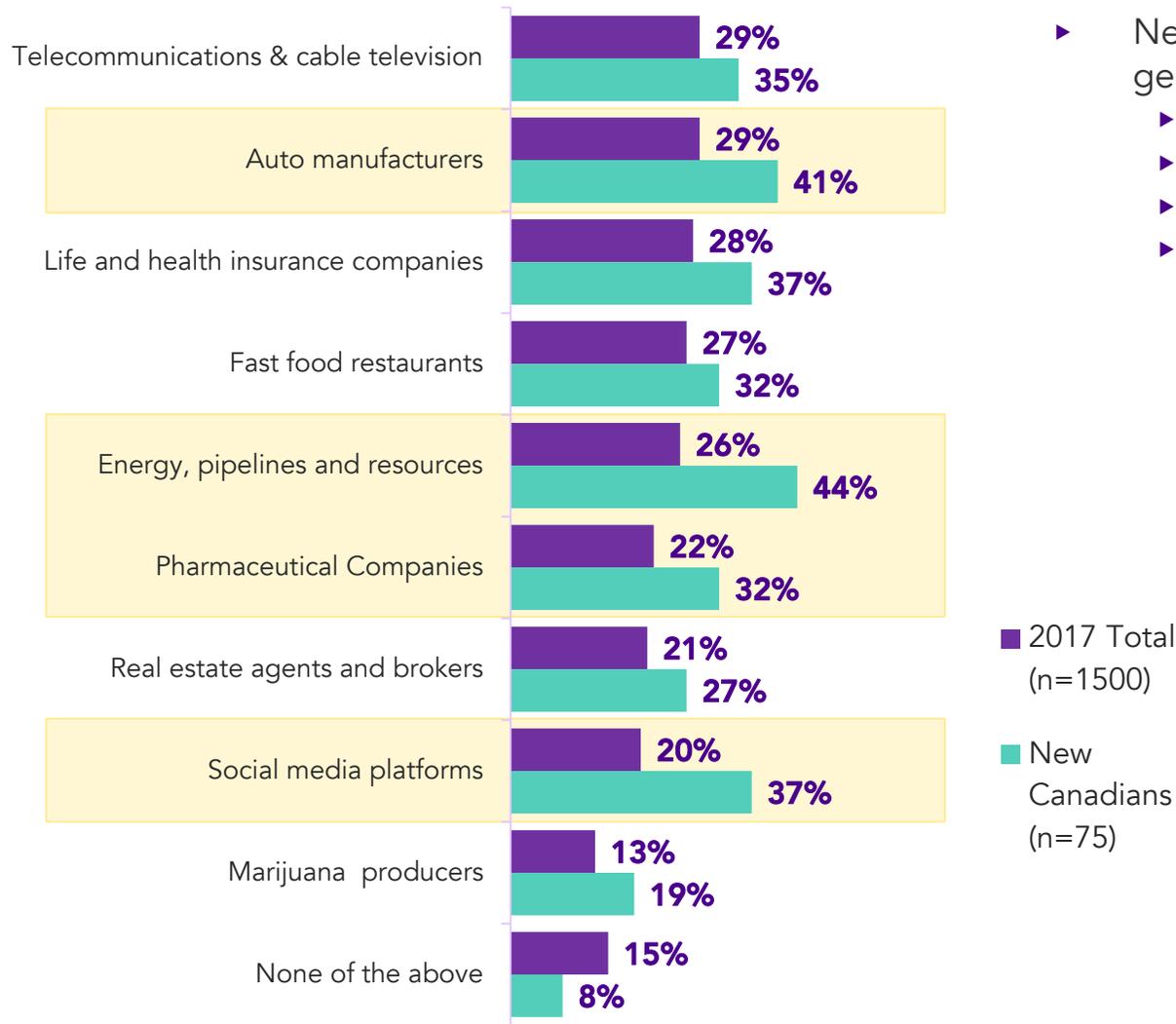
- ▶ There are no significant differences between the perceptions of trust in various industries within New Canadians from last year to the current year.

n=1500

8. Please rank the following industry categories for how much you trust companies within these industries to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q11 2016)

New Canadians more likely to trust a range of industries

Trust in Industry



Key Highlights

- ▶ New Canadians are more likely than the general population to trust:
 - ▶ Auto manufacturers
 - ▶ Energy, pipeline and resources
 - ▶ Pharmaceutical companies
 - ▶ Social Media platforms

n=1500

8. Please rank the following industry categories for how much you trust companies within these industries to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q11 2016)

Lower levels of trust in Ontario in a wide range of industries

- Quebecers have higher levels of trust in many industries. In Edmonton and Calgary, there is more trust in energy, pipelines and resources. A lower proportion of Torontonians trust long-term care homes.

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Hospitals	62%	65%	59%	58%	69%	62%	68%	64%	60%	58%
Universities and Colleges	60%	60%	56%	70%	52%	57%	64%	60%	56%	65%
Retail Pharmacies	48%	47%	42%	58%	52%	41%	45%	46%	44%	58%
Food retailers	45%	44%	41%	51%	44%	37%	45%	48%	44%	49%
Loyalty points programs	41%	42%	36%	40%	53%	35%	50%	39%	37%	35%
Broadcasting and streaming	39%	37%	35%	49%	40%	32%	43%	35%	37%	39%
Banks	39%	39%	36%	41%	40%	35%	48%	36%	40%	34%
Home improvement retailers	39%	41%	36%	39%	40%	34%	44%	40%	38%	31%
Online shopping	38%	38%	33%	44%	42%	41%	42%	37%	35%	39%
Computer and electronic tech companies and retailers	36%	37%	32%	37%	36%	38%	36%	36%	34%	34%
Long-term care homes	33%	34%	29%	36%	35%	32%	40%	28%	26%	31%
Retirement residences	33%	36%	28%	30%	39%	34%	37%	33%	28%	32%
Telecommunications & cable television	29%	30%	22%	34%	26%	24%	34%	26%	26%	24%
Auto manufacturers	29%	29%	27%	31%	28%	28%	31%	28%	31%	19%
Life and health insurance companies	28%	29%	25%	33%	27%	22%	38%	23%	25%	34%
Fast food restaurants	27%	26%	22%	37%	27%	22%	26%	26%	24%	32%
Energy, pipelines and resources	26%	33%	20%	20%	23%	22%	39%	42%	23%	16%
Pharmaceutical Companies	22%	22%	19%	26%	23%	23%	26%	19%	23%	27%
Real estate agents and brokers	21%	20%	20%	23%	25%	15%	25%	18%	20%	18%
Social media platforms	20%	18%	18%	26%	23%	22%	20%	15%	20%	25%
Marijuana producers	13%	15%	13%	10%	12%	15%	18%	16%	13%	10%
None of the above	15%	16%	18%	10%	14%	19%	15%	19%	19%	10%

 =significantly higher than average

 =significantly lower than average

n=1500

8. Please rank the following industry categories for how much you trust companies within these industries to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. Select one response for each. (Q11 2016)

Trust differs based on age for pharmacies, online shopping and marijuana

- ▶ Men and women have differing levels of trust for loyalty card programs, and real estate agents/brokers.
- ▶ Younger Canadians report more trust in social media platforms.

	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
Hospitals	62%	67%	60%	63%	64%	60%
Universities and Colleges	60%	59%	59%	62%	60%	61%
Retail Pharmacies	48%	44%	46%	52%	47%	50%
Food retailers	45%	48%	43%	47%	43%	47%
Loyalty points programs	41%	41%	41%	41%	37%	45%
Broadcasting and streaming	39%	38%	38%	40%	38%	41%
Banks	39%	43%	37%	40%	37%	40%
Home improvement retailers	39%	44%	37%	41%	39%	39%
Online shopping	38%	40%	41%	34%	37%	39%
Computer and electronic technology companies and retailers	36%	43%	36%	35%	34%	37%
Long-term care homes	33%	33%	31%	35%	33%	33%
Retirement residences	33%	36%	32%	33%	31%	34%
Telecommunications & cable television	29%	30%	26%	31%	27%	30%
Auto manufacturers	29%	33%	29%	29%	27%	30%
Life and health insurance companies	28%	37%	26%	31%	26%	30%
Fast food restaurants	27%	30%	26%	28%	27%	27%
Energy, pipelines and resources	26%	30%	25%	27%	26%	26%
Pharmaceutical Companies	22%	28%	23%	21%	21%	23%
Real estate agents and brokers	21%	26%	21%	21%	18%	24%
Social media platforms	20%	32%	21%	18%	19%	22%
Marijuana producers	13%	17%	16%	10%	13%	13%
None of the above	15%	10%	17%	13%	15%	15%

 =significantly higher than average

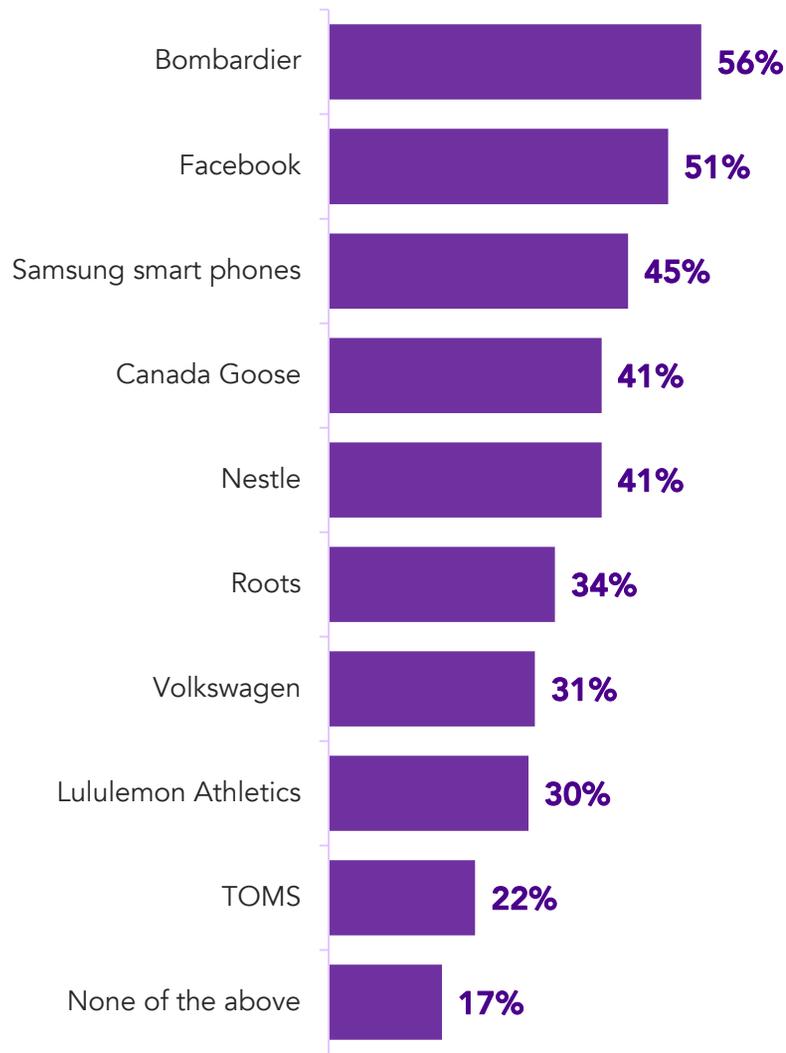
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n=1500

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More than half trust Facebook and Bombardier for reliability & quality

Trust in Brands



Key Highlights

- ▶ Those who trust Bombardier for reliable and high quality products are more likely to be employed full-time (59%), high income earners (\$150k+, 65%), and native English speakers (58%).
- ▶ Married respondents (54%) and those with teenagers at home (62%) are more likely to trust Facebook for reliable and high quality services.
- ▶ Canadians who trust Samsung smartphones are more likely to have younger children at home (<13 years, 52%), and lower income (\$25k-\$50k, 54%).

n=1500

Q9. On a scale of 1-7, with 1 being the lowest and 7 being the highest, how much do you trust the following companies and brands for reliable, high quality products or services? *Select one response for each. (Q11b in qnr).*

Brands yield different levels of trust in different regions in Canada

- ▶ Torontonians are more likely to trust Bombardier, as well as TOMS. Respondents in Montréal are more likely to trust Nestle and Roots. Those in Calgary and Vancouver are more likely to trust Lululemon.
- ▶ There is a lower proportion of Ontarians who trust Facebook, Nestle, Roots, and Lululemon.
- ▶ A higher proportion of Canadians in Atlantic Canada trust Samsung smart phones.

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Bombardier	56%	55%	61%	50%	59%	54%	51%	56%	63%	51%
Facebook	51%	52%	46%	55%	58%	45%	51%	52%	49%	57%
Samsung smart phones	45%	44%	42%	46%	55%	38%	42%	48%	40%	44%
Canada Goose	41%	40%	43%	44%	36%	32%	40%	47%	45%	44%
Nestle	41%	39%	31%	58%	44%	41%	37%	33%	30%	57%
Roots	34%	30%	29%	46%	42%	29%	23%	28%	32%	47%
Volkswagen	31%	32%	30%	31%	32%	34%	30%	28%	31%	26%
Lululemon Athletics	30%	36%	26%	27%	25%	41%	33%	39%	28%	33%
TOMS	22%	25%	25%	15%	21%	28%	22%	28%	30%	17%
None of the above	17%	17%	17%	16%	15%	20%	19%	17%	19%	14%

 =significantly higher than average

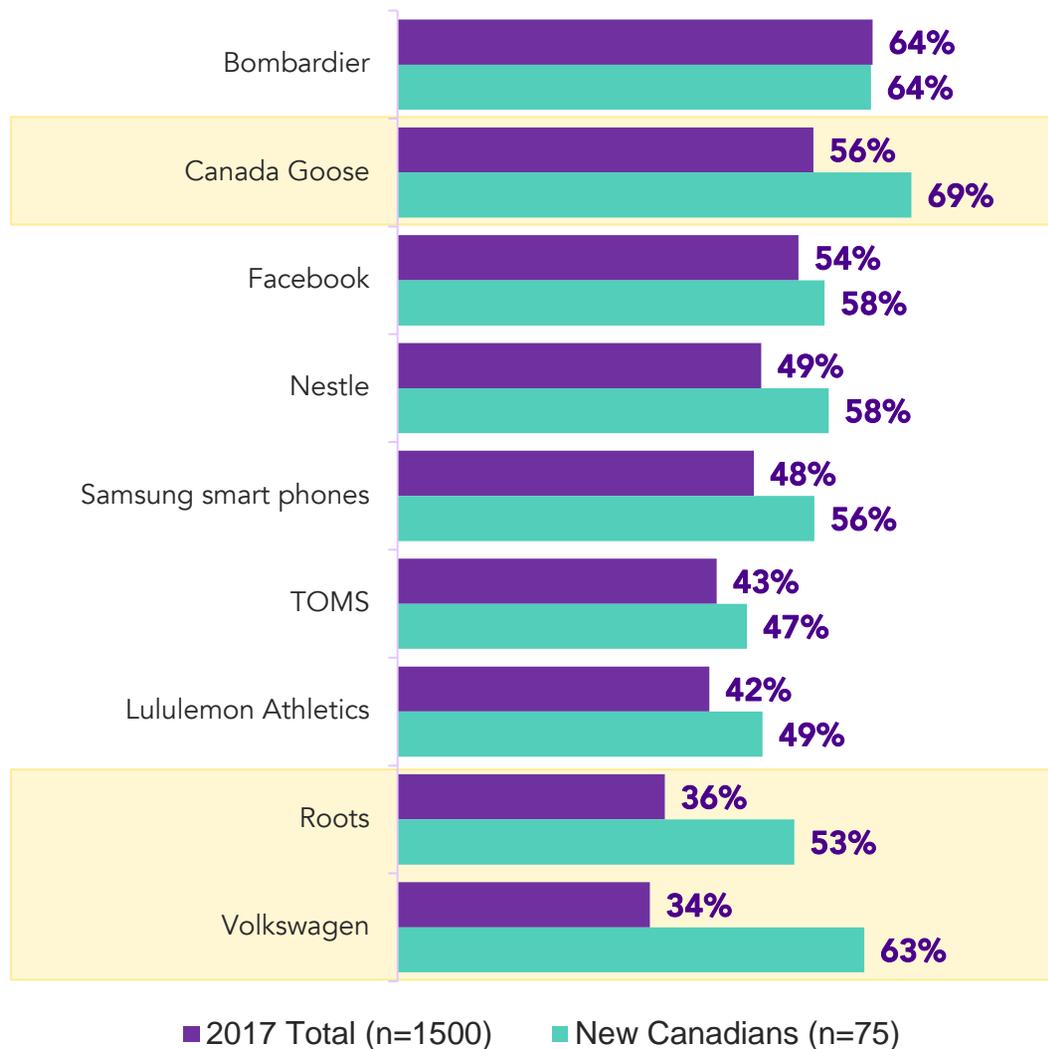
 =significantly lower than average

n=1500

Q9. On a scale of 1-7, with 1 being the lowest and 7 being the highest, how much do you trust the following companies and brands for reliable, high quality products or services? *Select one response for each. (Q11b in qnr).*

New Canadians place more trust in almost all brands than Canadians as a whole

Trust in Brands



Key Highlights

- ▶ New Canadians place more trust than the general population of Canadians in the following brands:
 - ▶ Canada Goose
 - ▶ Roots
 - ▶ Volkswagen

Note* brands are re-based to remove those who indicated n/a



Trust in Companies and CEO Visibility

A higher proportion of Canadians are placing importance on various actions



Key Highlights

- ▶ A higher proportion of Canadians are deeming it important that organizations create jobs or invest in their community, that leaders are open and accessible in their communication, that companies are Canadian, and that they support charitable causes within their community – a significant increase from 2016.
- ▶ Those with children in the household trust organizations who create jobs or invest in their community (79%).
- ▶ The results were consistent with no regional surprises.

n=1500

10. Please rank the following actions based on level of importance in determining how much you trust an organization to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is not that important and '7' means very important. *Select one response for each. *note – items shortened for convenience (Q12 – 2016)*

Women place more importance on a number of factors

- ▶ A higher proportion of women place importance on these areas for organizations to take action is driving up the overall average.
- ▶ Canadians aged 25-49 are more likely to trust an organization if they know someone who enjoys working there, or if a leader uses social media to communicate.

	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
The organization creates jobs and invests in my community	74%	74%	74%	74%	72%	76%
The leadership openly communicates and is accessible	71%	74%	69%	73%	68%	74%
They are Canadian owned	71%	74%	69%	73%	67%	75%
I enjoy their products or services	70%	67%	69%	70%	67%	72%
They support charitable causes in my community	63%	58%	62%	64%	59%	66%
I know someone who likes working there	48%	49%	51%	45%	47%	50%
The leaders use social media channels to communicate	29%	35%	32%	25%	26%	31%
None of the above	11%	11%	12%	10%	12%	11%

 =significantly higher than average

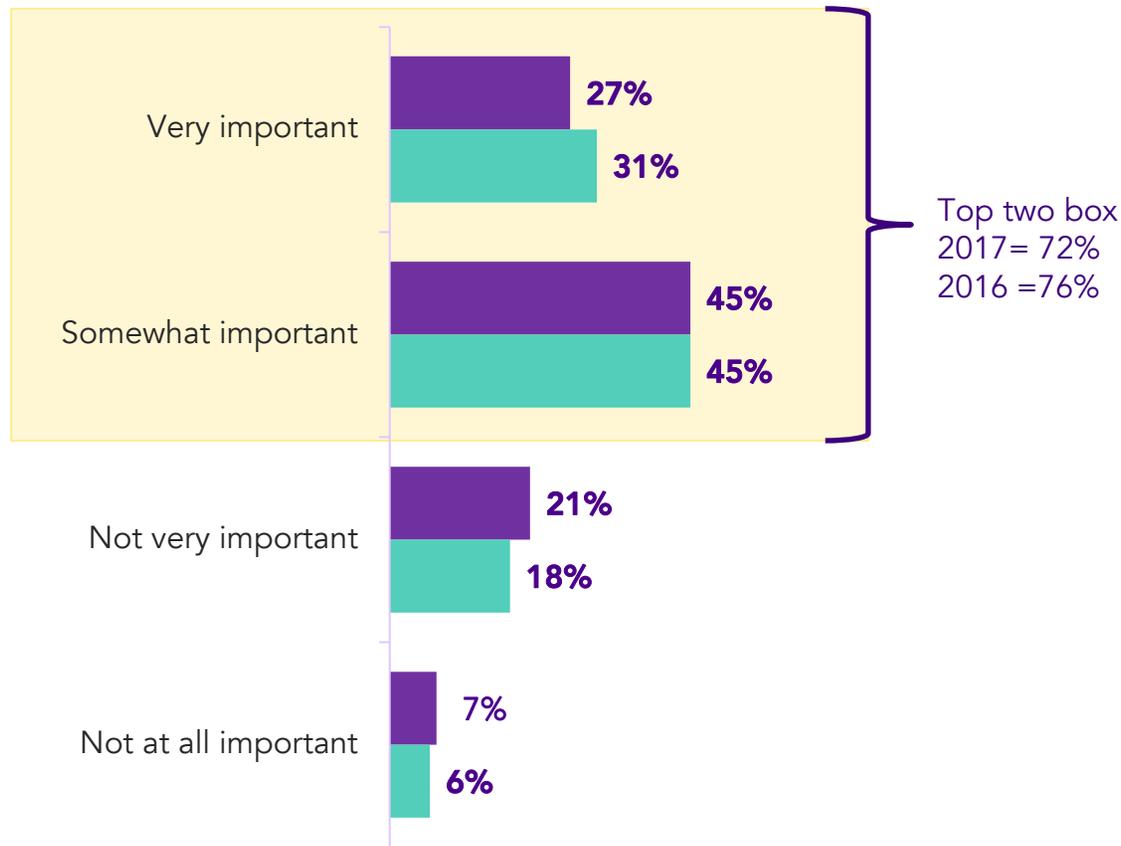
 =significantly lower than average

n=1500

10. Please rank the following actions based on level of importance in determining how much you trust an organization to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is not that important and '7' means very important. *Select one response for each. *note – items shortened for convenience (Q12 – 2016)*

Lower proportion of Canadians deem CEO visibility and accessibility important

CEO Visibility & Accessibility



Key Highlights

- ▶ Canadians who deem it important for a CEO to be visible and accessible on social media are more likely to be women (75%), have children in the household (81%), and daily users of social media (all except LinkedIn).
- ▶ Those who are retired are more likely to say it is not at all important (10%).

n=1500

Varying levels of importance for CEO visibility on social media by age & gender

- ▶ Women are more likely to deem it important for a CEO to be visible and accessible on social media, while a higher proportion of men deem it not at all important.
- ▶ Those aged 25-49 place some importance, and older respondents are more likely to place a lot or no importance, on CEO visibility.

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
TOP 2 BOX	72%	72%	74%	69%	72%	71%	72%	73%	71%	67%
Very important	27%	26%	30%	24%	30%	25%	32%	23%	32%	19%
Somewhat important	45%	46%	44%	45%	42%	46%	40%	50%	39%	48%
Not very important	21%	20%	19%	24%	21%	24%	22%	21%	21%	24%
Not at all important	7%	7%	7%	7%	7%	5%	6%	6%	7%	9%
BOTTOM 2 BOX	28%	28%	26%	31%	28%	29%	28%	27%	29%	33%

	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
TOP 2 BOX	72%	79%	73%	70%	69%	75%
Very important	27%	25%	23%	32%	26%	28%
Somewhat important	45%	54%	50%	38%	43%	47%
Not very important	21%	15%	21%	21%	22%	20%
Not at all important	7%	6%	6%	9%	9%	5%
BOTTOM 2 BOX	28%	21%	27%	30%	31%	25%



=significantly higher than average



=significantly lower than average

n=1500

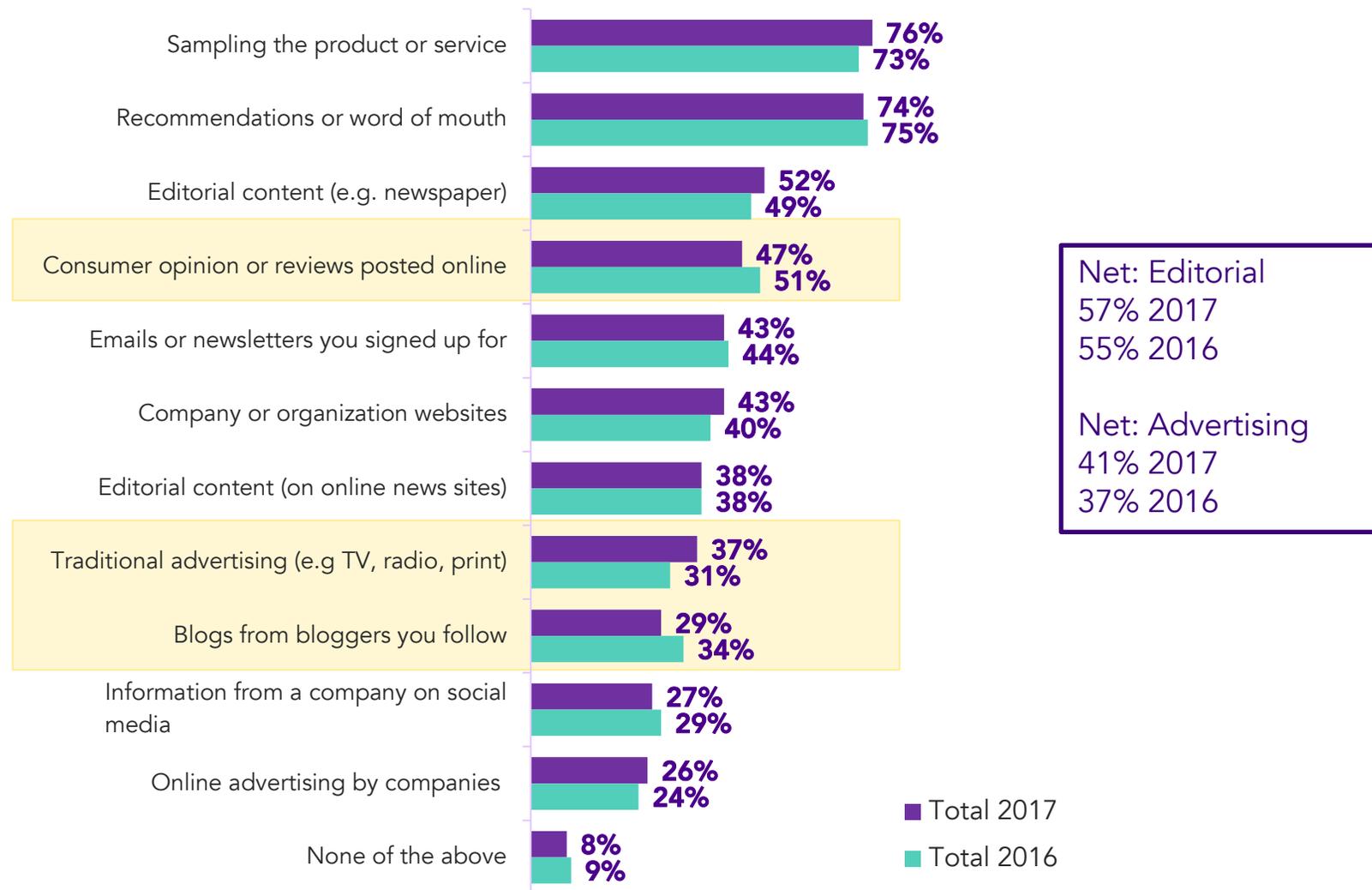




Trust in Media and Information Sources

Product sampling and recommendations yield highest levels of trust

Trust in Media Sources



n=1500

1. Using a seven point scale, where '1' is strongly distrust and '7' is completely trust, to what extent do you trust the following sources of information about a product, service, brand or organization? Top 3 Box Summary. Note: items shortened. HHI=household income

Quebecers have more trust in various sources, and Vancouver mistrusts

- Regional differences indicate a lower level of trust within Vancouver. Quebecers are more likely to trust a wide range of information sources.

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Sampling the product or service	76%	76%	80%	67%	83%	67%	75%	76%	80%	65%
Recommendations by someone you know or word of mouth	74%	75%	80%	67%	72%	71%	75%	76%	79%	64%
NET: Editorial	57%	54%	57%	67%	54%	45%	54%	53%	57%	63%
Editorial content such as a story in a newspaper, on TV or on radio	52%	48%	49%	64%	50%	38%	49%	46%	49%	58%
Editorial content shared through online news sites	38%	36%	37%	46%	31%	27%	41%	42%	37%	41%
Consumer opinion or reviews posted online	47%	49%	50%	41%	50%	46%	47%	46%	49%	38%
NET: Advertising (Incl. Social Media)	45%	44%	40%	52%	48%	31%	44%	44%	45%	48%
Online advertising by companies or organizations	26%	24%	22%	34%	28%	18%	23%	28%	25%	30%
Traditional advertising in television, radio, print or billboard by companies or organizations	37%	35%	34%	44%	39%	26%	37%	35%	38%	41%
Information shared by a company or organization on social media	27%	25%	24%	36%	23%	17%	27%	24%	27%	31%
Emails or newsletters you signed up for	43%	41%	43%	48%	43%	44%	43%	37%	44%	45%
Company or organization websites	43%	44%	41%	45%	40%	39%	43%	46%	45%	41%
Information shared on social media channels by a friend, family member or someone you know	42%	43%	41%	43%	40%	37%	42%	46%	40%	37%
Blogs from bloggers you follow	29%	28%	31%	26%	30%	27%	25%	31%	33%	26%
None of the above	8%	8%	7%	8%	6%	15%	9%	7%	7%	6%

 =significantly higher than average

 =significantly lower than average

n=1500

- Using a seven point scale, where '1' is strongly distrust and '7' is completely trust, to what extent do you trust the following sources of information about a product, service, brand or organization? Top 3 Box Summary.

There's a trust gap between women and men

- Men and women have different levels of trust for almost all sources of information. A higher proportion of younger respondents trust advertising, and social media, while those aged 25-49 trust consumer reviews or bloggers, and those aged 50+ trust products they have sampled, or people they know have used and shared online.

	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
Sampling the product or service	76%	78%	74%	78%	72%	79%
Recommendations by someone you know or word of mouth	74%	74%	73%	75%	67%	80%
NET: Editorial	57%	65%	56%	58%	54%	60%
Editorial content such as a story in a newspaper, on TV or on radio	52%	60%	49%	54%	49%	55%
Editorial content shared through online news sites	38%	46%	38%	37%	36%	40%
Consumer opinion or reviews posted online	47%	52%	50%	44%	44%	51%
NET: Advertising (Incl. Social Media)	45%	56%	44%	46%	41%	49%
Online advertising by companies or organizations	26%	38%	24%	26%	24%	28%
Traditional advertising in television, radio, print or billboard by companies or organizations	37%	44%	35%	38%	33%	41%
Information shared by a company or organization on social media	27%	42%	27%	25%	24%	30%
Emails or newsletters you signed up for	43%	52%	42%	44%	39%	47%
Company or organization websites	43%	57%	43%	41%	38%	47%
Information shared on social media channels by a friend, family member or someone you know	42%	38%	39%	46%	37%	47%
Blogs from bloggers you follow	29%	36%	33%	22%	26%	31%
None of the above	8%	7%	9%	6%	9%	6%

 =significantly higher than average

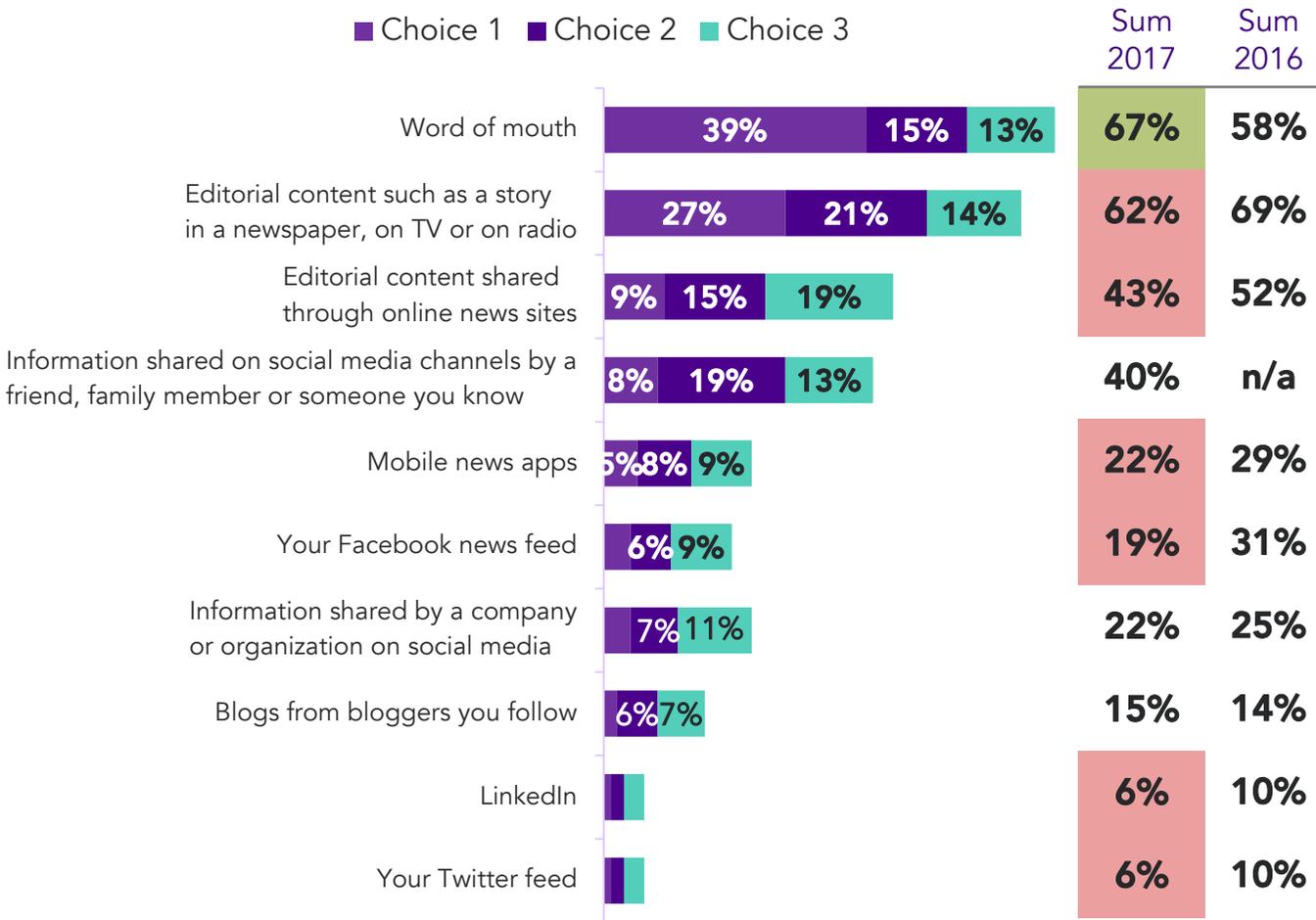
 =significantly lower than average

n=1500

- Using a seven point scale, where '1' is strongly distrust and '7' is completely trust, to what extent do you trust the following sources of information about a product, service, brand or organization? Top 3 Box Summary.

Canadians increasingly prefer word of mouth as their source of news

Preferred Sources to Receive Current Events News



Key Highlights

- ▶ Canadians who are more likely to choose traditional forms of editorial content as their first choice to receive news are more likely to be Quebecers (39%), from Montréal (36%), aged 50+ (31%), retired (35%) and men (30%).
- ▶ Daily Facebook users are more likely to choose social media (shared by family or companies, 10%/4%), their Facebook feed (7%), or bloggers (2%).

■ =significantly higher than last year
■ =significantly lower than last year

n=1500

2. When looking at news sources please indicate which of the following sources you prefer to get your news about current events. Please select the top three responses that most apply. *note <5% values not shown on chart

Respondents 50+ prefer editorial as their preferred information source

- ▶ Men are more likely to select traditional or online editorial content, while women are more likely to prefer word of mouth as their preferred source of information to receive news.
- ▶ Those aged 25-49 are more likely to prefer mobile news apps, social media or bloggers, while 50+ respondents prefer editorial content in newspapers, TV or radio.

1 ST CHOICE SUMMARY TABLE	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
Word of mouth	39%	33%	38%	41%	34%	44%
Editorial content such as a story in a newspaper, on TV or on radio	27%	26%	23%	31%	30%	24%
Editorial content shared through online news sites	9%	9%	10%	8%	11%	8%
Information shared on social media channels by a friend, family member or someone you know	8%	5%	8%	9%	7%	10%
Mobile news apps	5%	6%	7%	4%	7%	4%
Your Facebook news feed	4%	9%	6%	3%	4%	4%
Information shared by a company or organization on social media	4%	9%	4%	3%	4%	3%
Blogs from bloggers you follow	2%	1%	3%	1%	2%	2%
LinkedIn	1%	-	1%	1%	1%	1%
Your Twitter feed	1%	2%	1%	*%	1%	1%

 =significantly higher than average

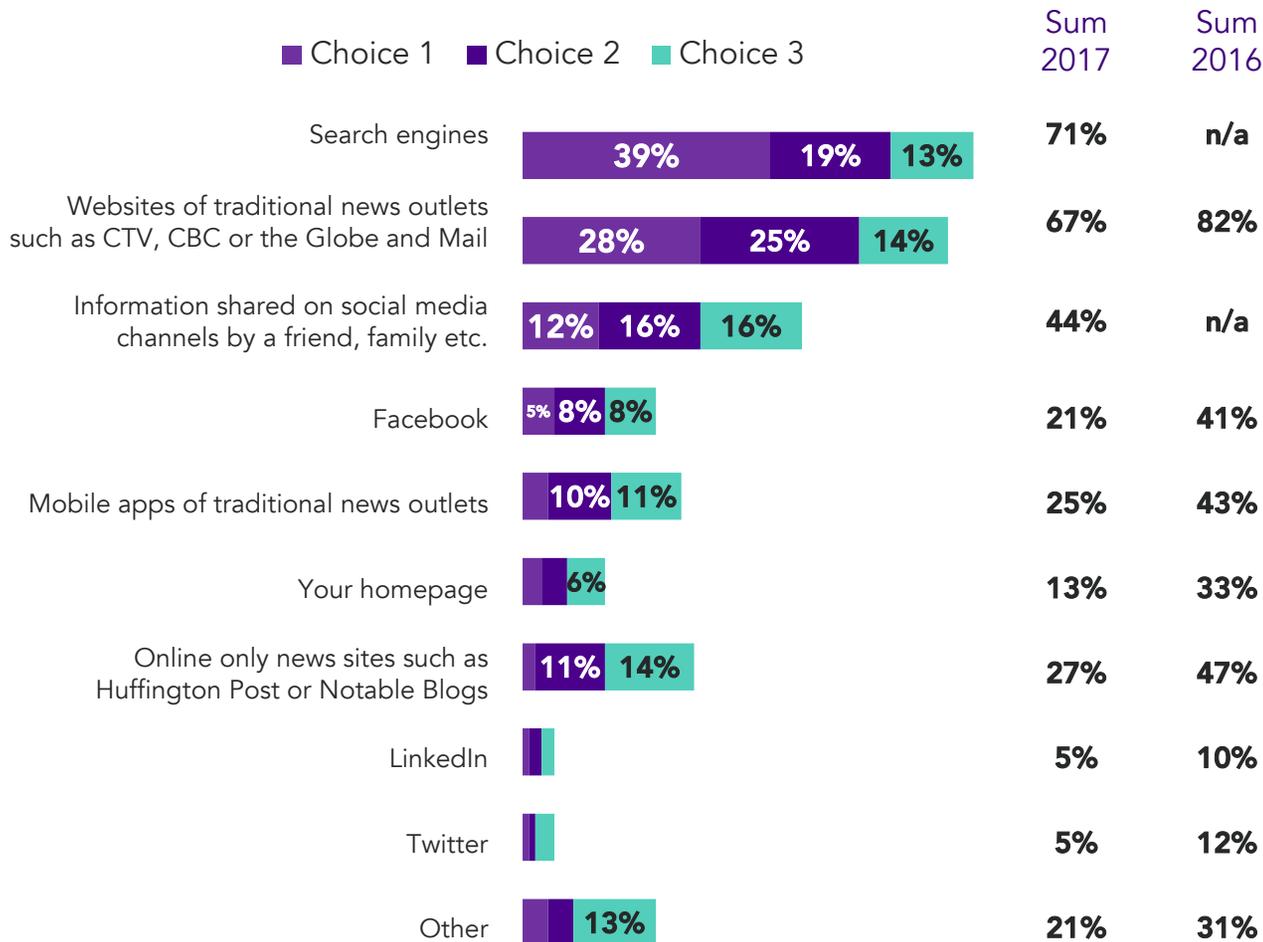
 =significantly lower than average

n=1500

2. When looking at news sources please indicate which of the following sources you prefer to get your news about current events. Please select the top three responses that most apply. Choice #1 Summary. *note <5% values not shown on chart

Online search engines and news websites are the preferred online sources for news

Current Events News



Key Highlights

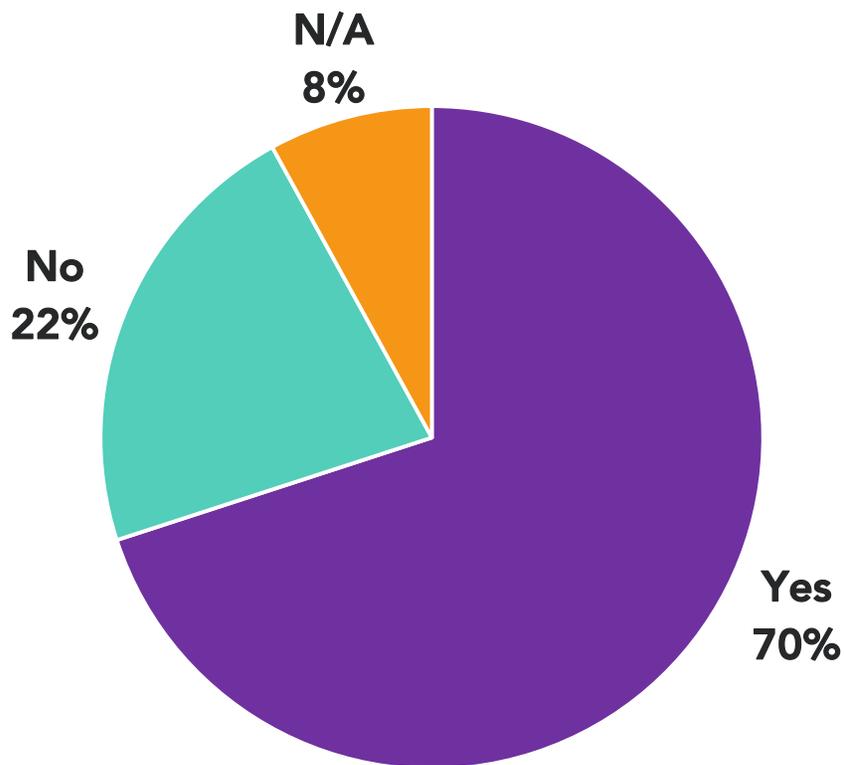
- ▶ Higher income earners (\$100k-\$150k) are more likely to prefer search engines (46%).
- ▶ Native French speakers are more likely than average to prefer search engines (48%).
- ▶ Native English speakers are more likely to prefer traditional news websites (33%).

n=1500

3. When it comes to online sources specifically, what are your preferred sources for news about current events?
Please select the top three responses that most apply. *note <5% values not shown on chart

A majority of Canadians report they are influenced by online reviews

Influenced by online reviews to purchase product/service?



Key Highlights

- ▶ Canadians who report being influenced by online reviews are more likely to be married (72%), have children (78%), work full-time (73%), have a higher HHI* (>\$100k, ~80%), native English speakers (72%), and are using social media daily (all social media except Google+).
- ▶ Those who say 'no' are more likely to be separated/divorced (28%), retired (28%), and native French speakers (29%).
- ▶ Ontarians (specifically in Toronto), and Calgarians report that online reviews have impacted their decision-making for products/services.

n=1500

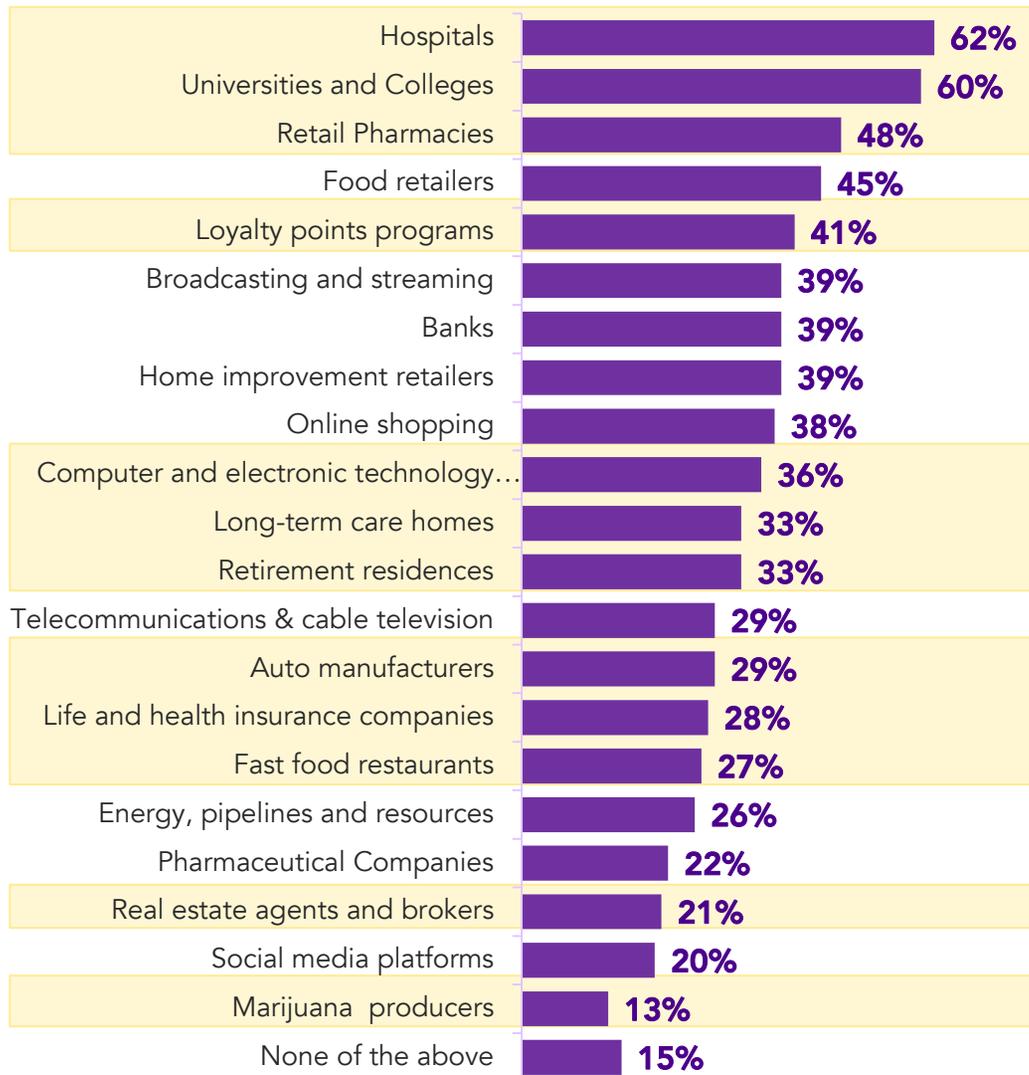
4. When reading an online review or comment from others who have purchased the same product or service you are seeking has reading the review ever been the reason you have chosen to buy or not buy that product or service? *Select one response.* Q.7 – 2016

*HHI = household income

Trust in Marijuana Industry

Marijuana producers yield lowest level of trust from Canadians

Trust in Industry



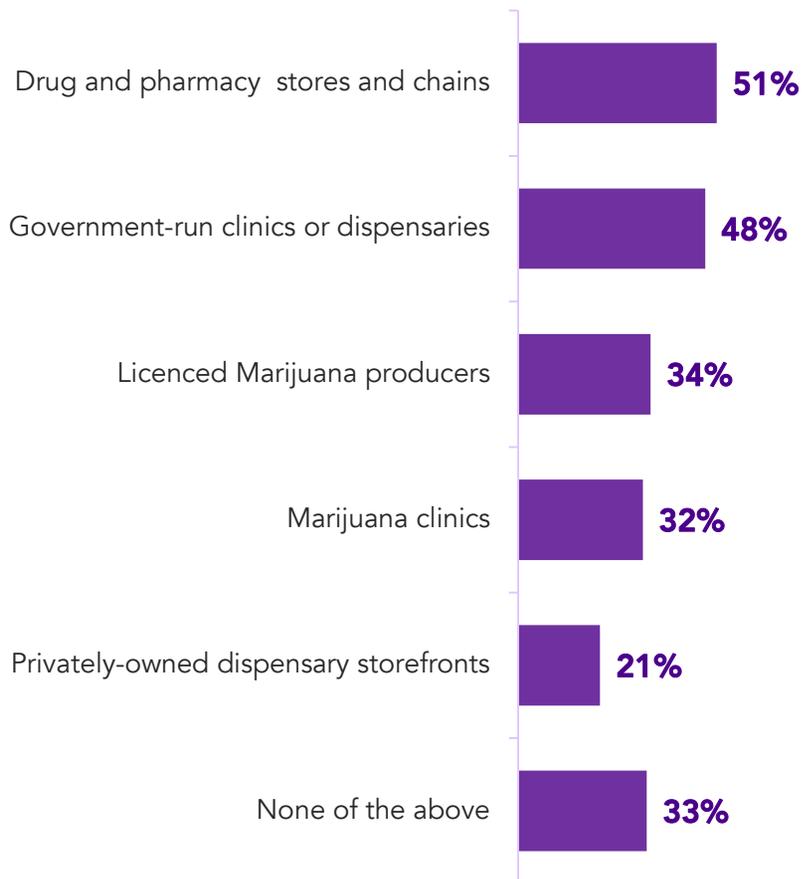
- ▶ We added new industry sectors this year (see yellow boxes).
- ▶ Marijuana is a new area of study to the CanTrust Index this year.

n=1500

8. Please rank the following industry categories for how much you trust companies within these industries to do what is right for Canada, Canadians and our society, using a seven point scale, where '1' is trust very little and '7' is trust them a lot. *Select one response for each.* (Q11 2016)

Half of Canadians trust pharmacies or government-run clinics for distribution

Trust in Marijuana Distributors (Medical or Recreational)



Key Highlights

- ▶ Older, and retired Canadians (57%), who own their home (53%) & have a higher HHI (\$150k+, 63%) are more likely to trust drug stores and pharmacies.
- ▶ Retirees are also more likely to trust government-run clinics (57%).
- ▶ A higher proportion of full-time employees (24%) and daily Facebook (23%) and Instagram (27%) users report trusting privately-owned dispensaries.

n=1500

13. On a scale of 1-7, with 1 being the lowest and 7 being the highest who do you trust to be authorized to sell or distribute marijuana for medical purposes or recreational use? *Select one response for each.*

Western Canada more likely to trust licensed marijuana producers

- ▶ A lower proportion of Quebecers report trusting licenced marijuana producers. Specifically in Montréal, a lower proportion trust privately-owned dispensaries.
- ▶ In Calgary, there is a lower proportion of people who report trusting government-run clinics or dispensaries.

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Drug and pharmacy stores and chains	51%	52%	48%	54%	49%	45%	53%	58%	47%	48%
Government-run clinics or dispensaries	48%	49%	51%	47%	43%	52%	49%	39%	49%	42%
Licenced Marijuana producers	34%	37%	31%	28%	41%	33%	35%	41%	29%	30%
Marijuana clinics	32%	34%	32%	29%	31%	28%	35%	34%	31%	32%
Privately-owned dispensary storefronts	21%	22%	21%	18%	27%	20%	25%	23%	22%	14%
None of the above	33%	33%	34%	34%	34%	33%	33%	34%	36%	38%

 =significantly higher than average

 =significantly lower than average

n=1500

13. On a scale of 1-7, with 1 being the lowest and 7 being the highest who do you trust to be authorized to sell or distribute marijuana for medical purposes or recreational use? *Select one response for each.*

Older Canadians more likely to trust drug stores and pharmacies

- ▶ Canadians aged 25-49 are more likely to trust privately-owned dispensaries than the average Canadian.
- ▶ Women are more likely than men to trust licenced marijuana producers, and clinics to sell or distribute medical or recreational marijuana.

	TOTAL	18-24	25-49	50+	MALE	FEMALE
Total	1500	81	756	663	721	779
Drug and pharmacy stores and chains	51%	53%	47%	55%	50%	52%
Government-run clinics or dispensaries	48%	48%	46%	51%	49%	48%
Licensed Marijuana producers	34%	40%	35%	31%	31%	36%
Marijuana clinics	32%	42%	33%	30%	29%	35%
Privately-owned dispensary storefronts	21%	26%	24%	18%	21%	21%
None of the above	33%	32%	35%	32%	35%	32%

 =significantly higher than average

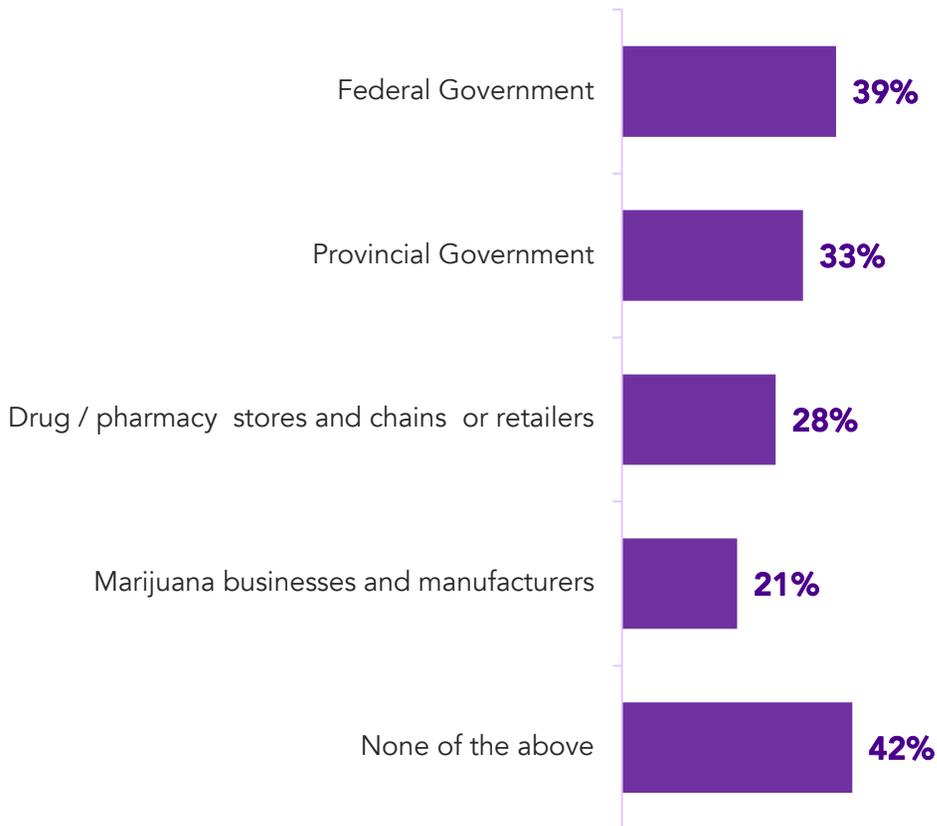
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n=1500

13. On a scale of 1-7, with 1 being the lowest and 7 being the highest who do you trust to be authorized to sell or distribute marijuana for medical purposes or recreational use? *Select one response for each.*

Almost half would not trust any proposed organizations to set price

Trust in Organizations to Set Price of Marijuana (Medical)



n=1500

14. On a scale of 1-7, with 1 being the lowest and 7 being the highest who do / would you trust to set the price on marijuana to be used for medical purposes? *Select one response for each*

Key Highlights

- ▶ Retired respondents (45%) and higher income respondents (\$100k-\$150k, 46%) are more likely to trust the Federal government to set the price of medical marijuana.
- ▶ Those working full-time (23%) and those with children (aged 13-17, 30%) are more likely to trust marijuana businesses.
- ▶ Those who are separated or divorced (34%) are more likely to trust drug stores/pharmacies.
- ▶ Low income Canadians (HHI\$25 to <\$50K, 49%), those who do not deem it important for a CEO to be on social media (47%) and those who are not influenced by online reviews (51%) are all more likely NOT to trust any of the organizations listed.
- ▶ From respondents who do trust marijuana producers, the highest proportion place trust in marijuana businesses and manufacturers, even over government bodies and pharmacies.
- ▶ The results are fairly even between men and women.

Western Canadians have differing trust levels for drug stores & marijuana businesses

- ▶ While Western Canadians are more likely to trust marijuana businesses & manufacturers (26%), those in Ontario and Québec are less likely to trust them (16%/17%, respectively).
- ▶ Quebecers are more likely to trust drug/pharmacy stores (35%), while Ontarians are less likely to trust them (21%).
- ▶ On the other hand, Torontonians are less likely to trust drug/pharmacy stores (22%) and marijuana businesses (16%).

	TOTAL	WEST	ON	QB	ATL	VAN	EDM	CGY	TOR	MTL
Total	1500	650	400	326	124	143	103	109	216	125
Federal Government	39%	39%	39%	40%	35%	39%	44%	31%	37%	42%
Provincial Government	33%	34%	31%	35%	25%	39%	39%	27%	31%	34%
Drug / pharmacy stores and chains or retailers	28%	28%	21%	35%	31%	26%	31%	27%	22%	34%
Marijuana businesses and manufacturers	21%	26%	16%	17%	26%	25%	27%	28%	16%	21%
None of the above	42%	42%	45%	40%	37%	45%	35%	47%	47%	41%

 =significantly higher than average

 =significantly lower than average

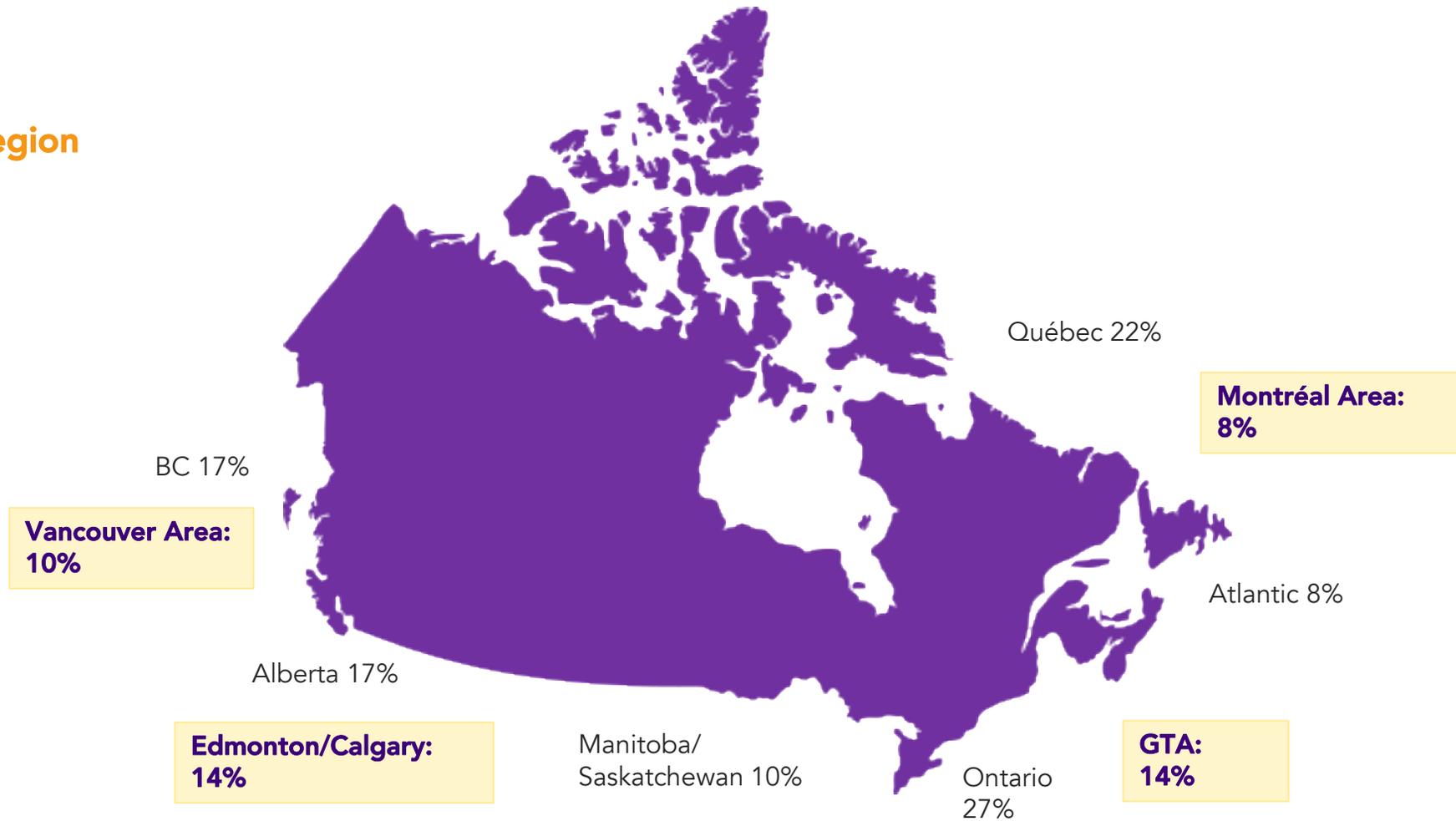
n=1500

14. On a scale of 1-7, with 1 being the lowest and 7 being the highest who do / would you trust to set the price on marijuana to be used for medical purposes? *Select one response for each.*

Appendix: Profile of Respondents

Profile of respondents

Region



84% Born in Canada **16%** Born Elsewhere

Profile of respondents

Age

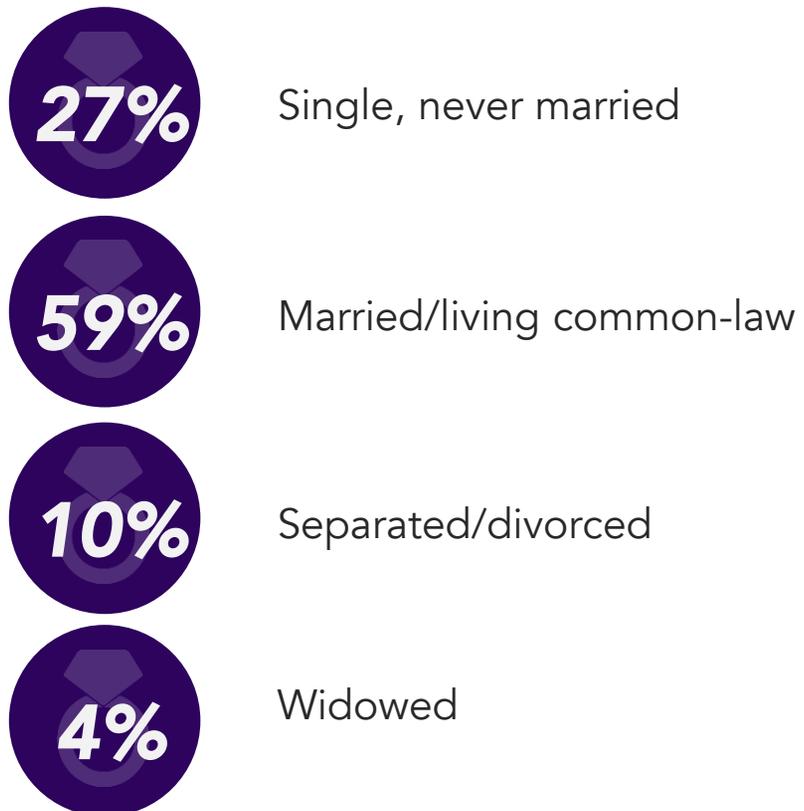
18 to 24 6%
25 to 34 22%
35 to 44 20%
45 to 54 20%
55+ 32%

65% speak English
25% speak French
5% speak Chinese

(incl. Mandarin/Cantonese
*note: all other languages
5% or less

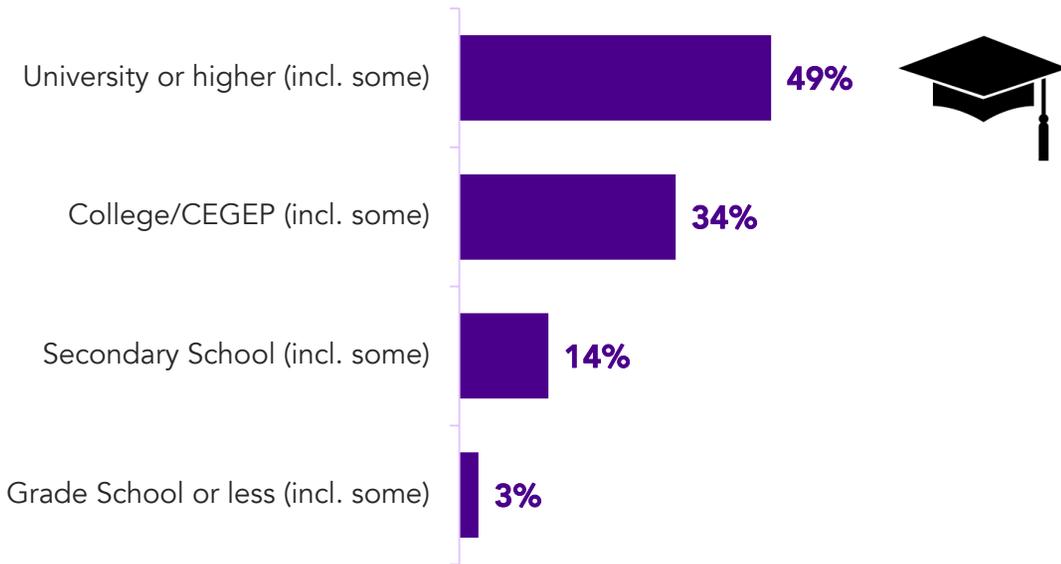
48% men  52% women 

Marital Status



Profile of respondents

Education



Average HHI \$76k

< \$25K	7%
>\$25K - <\$60K	25%
>\$60K - < \$75K	11%
>\$75K - < \$100K	14%
> \$100K	23%

*note: Refused 18%, DK 1%

Employment

Sales/service/clerical	33%
Manual labour	5%
Skilled/technical labour	12%
Professional/executive	37%
Supervisory/managerial	12%

66%
employed

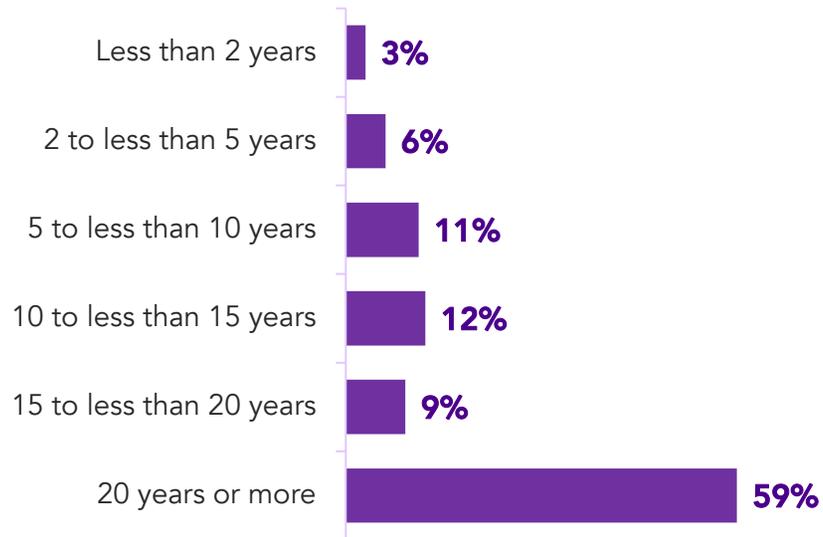


24% are retired
3% are students
4% are unemployed

Profile of respondents

Tenure in Canada

Note* Tenure in Canada only asked to people born outside Canada



55% are the primary shopper;
38% shop with another



Own	67%
Rent or Lease	25%
Neither (living at home with parents or with someone else)	7%

Under 13 years of age	17%
13 to 17 years of age	9%
None of the above	78%

Profile of respondents

	DAILY (BASE: ALL CANADIANS)	DAILY (BASE: WEEKLY USERS)	WEEKLY (BASE: ALL CANADIANS)	WEEKLY (BASE: ALL CANADIANS)
	2017	2017	2017	2016
	64%	85%	75%	74%
	30%	47%	63%	64%
	23%	62%	37%	34%
	9%	35%	25%	30%
	13%	57%	23%	24%
	16%	66%	24%	19%
	9%	37%	24%	18%
	7%	61%	12%	n/a
None of the above	21%	21%	7%	8%

 =significantly higher than last year
 =significantly lower than last year

Thank You

For more information please contact:

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