



**DALHOUSIE
UNIVERSITY**

FACULTY OF MANAGEMENT

Rowe School of Business
School of Information Management
School of Public Administration
School for Resource and Environmental Studies

SOCIAL LICENSE TO OPERATE RANKING

KEY FINDINGS

dal.ca/management

#DalSLOReport

AUTHORS

Vivian Howard
School of Information Management
vivian.howard@dal.ca

Allison Kader, MREM

Tyler Lightfoot, MLIS student

Michelle Adams
School for Resource and Environmental Studies
michelle.adams@dal.ca

Peggy Cunningham
Rowe School of Business
peggyc@dal.ca

Jeff Friesen
School of Public Administration
jeff.friesen@dal.ca

Tony Walker
School for Resource and Environmental Studies
trwalker@dal.ca

Published December 2017

TABLE OF CONTENTS

EXECUTIVE SUMMARY 5

AIM OF THE SURVEY 6

FOCUS: SOCIAL LICENSE TO OPERATE (SLO) 6

OUR CHALLENGE IN THIS PILOT PROJECT 6

THE SURVEY 6

THE RESPONDENTS 7

Figure 1: Number of survey responses by sector 7

SLO AND TRANSPORTATION PROVIDERS 8

OVERALL 8

GENDER DIFFERENCES 8

INCOME DIFFERENCES 8

REGIONAL DIFFERENCES 9

GENERAL OBSERVATIONS ABOUT SLO AND USAGE 9

Table 1: Transportation — Relationship between SLO and frequency of use 9

Table 2: Transportation — Gender differences in SLO rankings 10

Table 3: Transportation — Age differences in SLO rankings 10

Table 4: Transportation — Regional differences in SLO rankings 11

Table 5: Transportation — Income differences in SLO rankings 11

Figure 2: Transportation — Comparison of SLO Rankings 12

SLO AND FOOD RETAIL 13

OVERALL 13

MINIMAL VARIATION AMONG CONSUMERS 13

GENDER AND AGE DIFFERENCES 13

REGIONAL DIFFERENCES 14

GENERAL OBSERVATIONS ABOUT SLO AND USAGE 14

Table 6: Food Retail — Relationship between SLO and frequency of use 14

Table 7: Food Retail — Gender differences in SLO rankings 15

Table 8: Food Retail — Age differences in SLO rankings 15

Table 9: Food Retail — Regional differences in SLO rankings 15

Table 10: Food Retail — Income differences in SLO rankings 15

Figure 3: Food Retail — Comparison of SLO Rankings 16

SLO AND CLOTHING RETAIL 17

OVERALL 17

A STRONG PREFERENCE FOR CANADIAN BRANDS 17

GENDER DIFFERENCES 17

REGIONAL DIFFERENCES 17

INCOME DIFFERENCES 18

GENERAL OBSERVATIONS ABOUT SLO AND USAGE 18

Table 11: Clothing Retail — Relationship between SLO and frequency of use 18

WHICH CLOTHING RETAILERS DO CANADIANS RANK HIGHEST IN TERMS OF SLO? 19

Table 12: Clothing Retail — Gender differences in SLO rankings 19

Table 13: Clothing Retail — Age differences in SLO rankings 20

Table 14: Clothing Retail — Regional differences in SLO rankings 20

Table 15: Clothing Retail — Income differences in SLO rankings 21

Figure 4: Clothing Retail — Comparison of SLO Rankings 22

SLO AND GOVERNMENT DEPARTMENTS AND SERVICES 23

OVERALL 23

GENDER DIFFERENCES 23

REGIONAL DIFFERENCES 23

AGE DIFFERENCES 23

INCOME DIFFERENCES 23

GENERAL OBSERVATIONS ABOUT SLO AND USAGE 24

Table 16: Government Departments and Services — Relationship between SLO and frequency of use 24

WHICH GOVERNMENT DEPARTMENTS AND SERVICES DO CANADIANS RANK HIGHEST IN TERMS OF SLO? 25

Table 17: Government Departments and Services — Gender differences in SLO rankings 25

Table 18: Government Departments and Services — Age differences in SLO rankings 26

Table 19: Government Departments and Services — Regional differences in SLO rankings 26

Table 20: Government Departments and Services — Income differences in SLO rankings 27

EXECUTIVE SUMMARY

Do Canadians believe that organizations are trustworthy, socially responsible, environmentally sensitive and ethical? In other words, do Canadian organizations have a Social License to Operate (SLO)? Until Dalhousie's Faculty of Management explored these questions, no one had an answer.

SLO captures whether a company operating in a particular location has the approval of the local community. In October 2017, a bilingual on-line survey was sent to a sample of Canadians aged 18 and over. We asked Canadians about the sub-components of the SLO — trustworthiness, social responsibility, environmental responsibility, and ethical practices — in relation to national transportation providers, food retailers, clothing retailers, and government departments. Participants also had the opportunity to evaluate local organizations. We received 1641 completed replies that were drawn from every province and territory. To our knowledge, this is the first survey of this kind conducted in Canada.

Surprisingly, the results suggest that high perceived levels of trustworthiness, social responsibility, and sustainability are not consistently equated to frequency of use. In two sectors, government departments/services and transportation, high perceived levels of SLO actually have a negative correlation with

reported usage. In food retail, local food suppliers consistently received the highest SLO rankings for almost every demographic category and region, but ranked second in usage to the national retailer Loblaw's. Only in clothing retail was there a strong and consistent positive correlation between high perceived SLO and high usage. Furthermore, survey respondents demonstrated a strong preference for Canadian clothing retailers, giving Canadian brands higher SLO rankings.

There were other consistent patterns. Regionally, Northern Canadians have the most polarized views. In every sector, we found the greatest spread in the SLO rankings between the highest and lowest ranked items. Northern Canadians are also the most negative in their perceptions of SLO in every sector. In contrast, Central Canadians are the most positive and consistent in their SLO rankings, with the narrowest margins between highest and lowest ranked organizations in every sector. Middle income Canadians, earning between \$50,000 and \$100,000 per year, were also more positive in their perceptions of SLO in every sector than were Canadians in lower or higher income categories.

This survey was a pilot project. It will be repeated in future years. Now that we have a baseline of Canadians' opinions, we can track changing perceptions in a volatile consumer marketplace.

AIM OF THE SURVEY

To learn more about Canadians' perceptions of organizations in sectors with which they are familiar. What organizations do Canadians find to be most:

- **Trustworthy** (they live up to their promises and provide good value);
- **Socially responsible** (they contribute positively to the local community);
- **Environmentally responsible** (they use sustainable practices);
- **Ethical** (they treat employees and customers fairly).

FOCUS: SOCIAL LICENSE TO OPERATE (SLO)

Do organizations have the confidence of stakeholders? Are their activities morally and socially acceptable?

Key components:

- Trust
- Sustainability
- Corporate Social Responsibility and Ethics

OUR CHALLENGE IN THIS PILOT PROJECT

SLO is typically applied to the resource sector, and analyzes community response to a particular company in a particular location. Does the company have the approval of the community in which it operates?

Our question: Can SLO concepts be applied to organizations with national Canadian operations?

- Transportation providers
- Food retailers
- Clothing retailers
- Government departments and services

THE SURVEY

National bilingual online survey of Canadians aged 18+

- 1641 completed responses; margin of error: less than 3%

Respondents selected the organizations they are most familiar with/use most frequently from a list of national organizations/government departments

- Survey tailored to ask only about those organizations/departments
- Findings are provided for organizations/departments with **85+ responses**

Respondents rated each organization/department on a 5-point scale on a series of questions addressing trust, sustainability, corporate social responsibility, and ethical practices.

THE RESPONDENTS

GENDER

60% female
39% male
1% other

AGE

2% 18–20
29% 21–35
18% 36–45
51% 46+

REGIONS

35% West (BC, AB, SK, MB)
51% Central (ON, QC)
13% Atlantic (NS, NB, PE, NL)
1% North (YK, NT, NU)

FIGURE 1: NUMBER OF SURVEY RESPONSES BY SECTOR



A list of organizations was presented to the participants. For an organization to be included in this analysis, it had to receive 85 responses.

	OPTIONS PER SECTOR	OPTIONS SELECTED
FOOD RETAILERS	25	3
CLOTHING RETAILERS	14	9
TRANSPORTATION PROVIDERS	6	6
GOVERNMENT SERVICES/DEPARTMENTS	18	17

KEY FINDINGS

SLO AND TRANSPORTATION PROVIDERS

OVERALL

- Via Rail and WestJet are most **TRUSTED**
- Via Rail and Greyhound are considered most **SUSTAINABLE and ENVIRONMENTALLY RESPONSIBLE**
- WestJet, Via Rail, and Porter are considered most **SOCIALLY RESPONSIBLE and ETHICAL**

GENDER DIFFERENCES

Women and men appear to have some marked differences in perceptions of the SLO of transportation providers. Women have a very positive perception of WestJet's SLO and a low perception of local transportation providers. In contrast, men are much more positive about local providers and much more critical of WestJet, with Via Rail their highest ranked provider.

INCOME DIFFERENCES

Canadians in different income groups have different perceptions of the SLO of transportation providers. Those in the lowest income group (earning \$50,000/year or less) are more critical of transportation providers than those in other income groups. Higher income respondents (earning \$100,000/year or more) are the most polarized in their perceptions, with the widest spread between their highest ranked provider (Via Rail) and their lowest ranked provider (Air Canada). Middle income respondents, earning \$50,000–\$99,000/year, are the most positive in their perceptions of transportation providers overall. Lastly, the relative rankings of both WestJet and Air Canada generally decline with the increasing age and income level of respondents.

REGIONAL DIFFERENCES

Perceptions of the SLO of transportation providers vary regionally. Respondents in Central Canada have the least variation in their rankings, with the narrowest range between the highest ranked (Via Rail) and the lowest (local transportation provider). Central Canadians also appear to have the most positive perception of transportation providers' SLO overall. In contrast, Northern Canadians have the widest range in their rankings and the most negative rankings in the country.

Although all of the transportation providers included in the survey serve different regions of the country, not all providers serve the entire country. For example, Porter Airlines serves Central and Atlantic Canada only, which can account for its low rankings in the North and the West. However, Greyhound Bus Lines serves BC, Alberta, and Ontario, yet it receives high rankings in the Atlantic and in the North, areas of the country it does not serve. How can this be explained? One possibility is that residents may have experience with Greyhound outside of their local region or that they may be extrapolating from their experience with one of Greyhound's regional partner bus lines. It is also possible that residents may have experience with Greyhound Courier Express baggage delivery, which has a more extensive national coverage than the passenger service. However, it may also be possible that when it comes to Canadians' perception of SLO and transportation providers, familiarity appears to breed contempt, as discussed below.

GENERAL OBSERVATIONS ABOUT SLO AND USAGE

This survey revealed a startling mismatch between usage and perceived SLO: two of the transportation providers with the highest perceived SLO (Via Rail and Greyhound) had fairly low levels of actual usage whereas two of the transportation providers with the lowest perceived SLO (Air Canada and local transportation providers) had high levels of actual usage.

TABLE 1: TRANSPORTATION — RELATIONSHIP BETWEEN SLO AND FREQUENCY OF USE (ordered from highest rank to lowest)

OVERALL SLO RANKING	USAGE
1 Via Rail	1 WestJet
2 WestJet	2 Local
3 Greyhound	3 Air Canada
4 Porter	4 Porter
5 Local	5 Greyhound
6 Air Canada	6 Via Rail

WHICH TRANSPORTATION SUPPLIERS DO CANADIANS RANK HIGHEST IN TERMS OF SLO?

TOP TIER	Via Rail WestJet
MIDDLE TIER	Greyhound Porter
LOWER TIER	Local suppliers Air Canada

TABLE 2: TRANSPORTATION — GENDER DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

OVERALL	WOMEN	MEN
1 Via Rail	1 WestJet	1 Via Rail
2 WestJet	2 Via Rail	2 Local
3 Greyhound	3 Greyhound	3 Greyhound
4 Porter	4 Porter	4 Porter
5 Local	5 Local	5 WestJet
6 Air Canada	6 Air Canada	6 Air Canada

TABLE 3: TRANSPORTATION — AGE DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

18–20	21–35	36–45	46+
1 Via Rail	1 WestJet	1 Via Rail	1 Porter
2 Porter	2 Greyhound	2 Porter	2 Via Rail
3 Air Canada	3 Via Rail	3 WestJet	3 Greyhound
4 WestJet	4 Air Canada	4 Greyhound	4 WestJet
	5 Local	5 Local	5 Local
	6 Porter	6 Air Canada	6 Air Canada

TABLE 4: TRANSPORTATION — REGIONAL DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

WEST	CENTRAL	ATLANTIC	NORTH
1 WestJet	1 Via Rail	1 Greyhound	1 Greyhound
2 Greyhound	2 Porter	2 WestJet	2 Via Rail
3 Via Rail	3 Greyhound	3 Porter	3 WestJet
4 Local	4 WestJet	4 Local	4 Air Canada
5 Air Canada	5 Air Canada	5 Via Rail	5 Porter
6 Porter	6 Local	6 Air Canada	6 Local

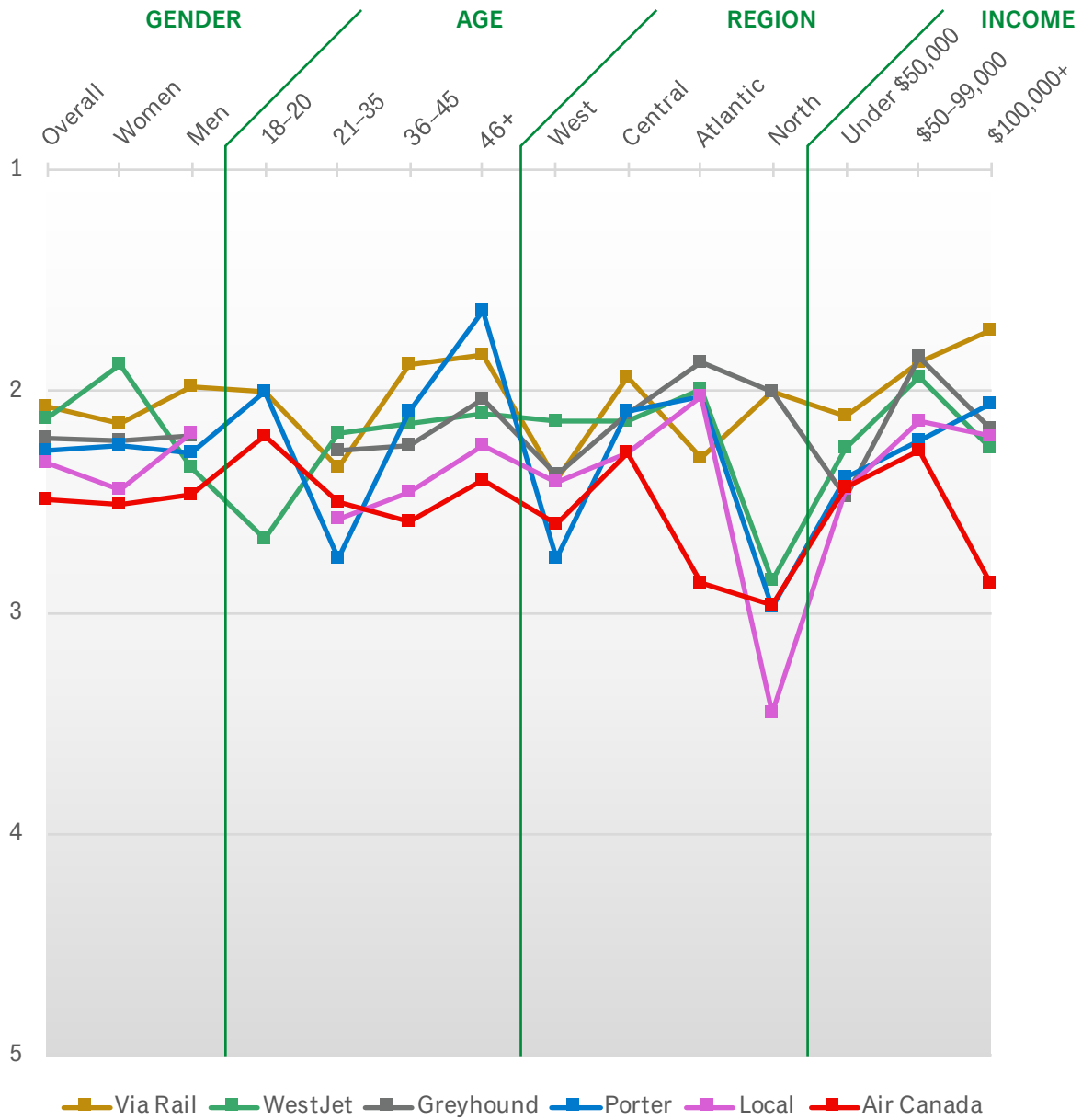
TABLE 5: TRANSPORTATION — INCOME DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

UNDER \$50,000	\$50–99,000	\$100,000+
1 Via Rail	1 Greyhound	1 Via Rail
2 WestJet	2 Via Rail	2 Porter
3 Porter	3 WestJet	3 Greyhound
4 Air Canada	4 Local	4 Local
5 Local	5 Porter	5 WestJet
6 Greyhound	6 Air Canada	6 Air Canada

FIGURE 2: TRANSPORTATION — COMPARISON OF SLO RANKINGS

(5 point scale, 1=highest ranking; 5=lowest)



KEY FINDINGS

SLO AND FOOD RETAIL

OVERALL

- Local food suppliers are most **TRUSTED**
- Local food suppliers are considered most **SUSTAINABLE and ENVIRONMENTALLY RESPONSIBLE**
- Local food suppliers and Loblaws are considered most **SOCIALLY RESPONSIBLE and ETHICAL**

MINIMAL VARIATION AMONG CONSUMERS

While the food retail sector resulted in the most survey responses by far, responses were much more consistent than those for any other sector. Respondents were provided with a list of 25 food providers, but only three—Loblaws (including SuperStore and No Frills), Sobeys (including Safeway and Freshco), and local food suppliers—met the threshold of 85 responses. Local food suppliers get top rank overall for both men and women, with Canadians from all income levels, and in every geographic region except for the North, where local providers are scarce. The ranking in almost all demographic and regional categories is 1) Local food supplier, 2) Loblaws, and 3) Sobeys. Canadians appear to make a much stronger differentiation in their perception of the SLO between national and local vendors than between the two main national vendors.

GENDER AND AGE DIFFERENCES

Women are significantly more positive than men in their rankings of food retailer SLO. Canadians aged 21–35 are most critical of food retailers overall and give them the most negative rankings of any age group. Canadians aged 21–35 are also the only age group to rank Loblaws first and local food suppliers third in overall SLO.

REGIONAL DIFFERENCES

Northern Canadians differ from respondents in other regions: they are the most negative in their perception of food retailer SLO and they do not list local food suppliers as an option. They appear to be limited to the two national food providers and have a low opinion of their SLO. In contrast, Central Canadians are most positive in their perceptions of food retailer SLO.

GENERAL OBSERVATIONS ABOUT SLO AND USAGE

Despite having the highest SLO rankings, local food providers come second to Loblaws in terms of actual usage.

TABLE 6: FOOD RETAIL — RELATIONSHIP BETWEEN SLO AND FREQUENCY OF USE (ordered from highest rank to lowest)

OVERALL SLO RANKING	USAGE
1 Local	1 Loblaws
2 Loblaws	2 Local
3 Sobeys	3 Sobeys

TABLE 7: FOOD RETAIL — GENDER DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

OVERALL	WOMEN	MEN
1 Local	1 Local	1 Local
2 Loblaws	2 Loblaws	2 Loblaws
3 Sobeys	3 Sobeys	3 Sobeys

TABLE 8: FOOD RETAIL — AGE DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

18–20	21–35	36–45	46+
1 Local	1 Loblaws	1 Local	1 Local
2 Sobeys	2 Sobeys	2 Sobeys	2 Loblaws
3 Loblaws	3 Local	3 Loblaws	3 Sobeys

TABLE 9: FOOD RETAIL — REGIONAL DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

WEST	CENTRAL	ATLANTIC	NORTH
1 Local	1 Local	1 Local	1 Loblaws
2 Loblaws	2 Loblaws	2 Loblaws	2 Sobeys
3 Sobeys	3 Sobeys	3 Sobeys	

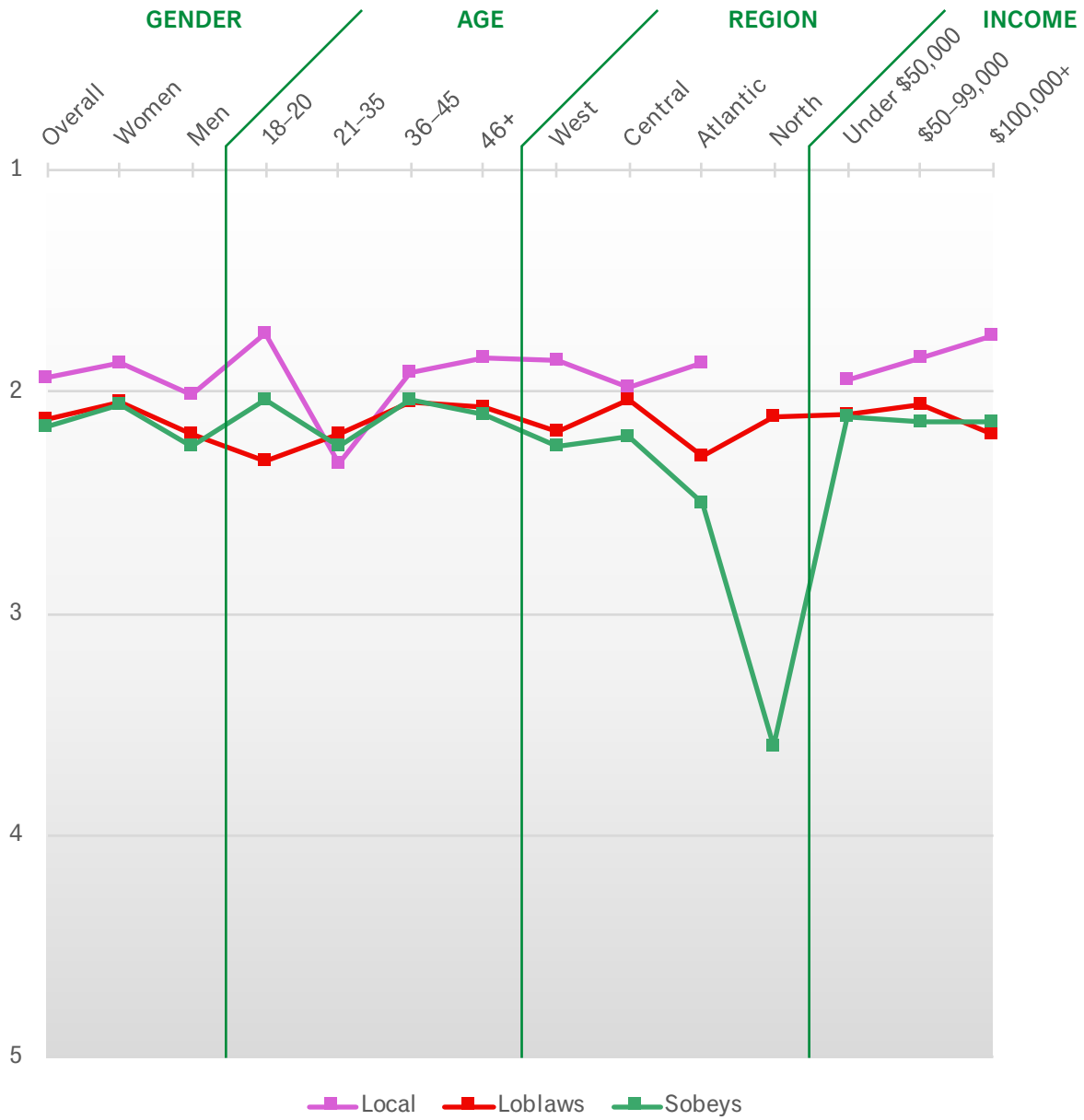
TABLE 10: FOOD RETAIL — INCOME DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

UNDER \$50,000	\$50–99,000	\$100,000+
1 Local	1 Local	1 Local
2 Loblaws	2 Loblaws	2 Sobeys
3 Sobeys	3 Sobeys	3 Loblaws

FIGURE 3: FOOD RETAIL — COMPARISON OF SLO RANKINGS

(5 point scale, 1=highest ranking; 5=lowest)



KEY FINDINGS

SLO AND CLOTHING RETAIL

OVERALL

- Roots and Mark's are most **TRUSTED**
- Roots and Lululemon are considered most **SUSTAINABLE and ENVIRONMENTALLY RESPONSIBLE**
- Roots and Mark's are considered most **SOCIALLY RESPONSIBLE and ETHICAL**

A STRONG PREFERENCE FOR CANADIAN BRANDS

Respondents display a strong positive preference for Canadian clothing retailers. The retailers ranked the highest in terms of SLO—Roots, Mark's, HBC, and Lululemon—have strong Canadian brand identities. The high ranking for Roots transcends gender, age, region, and income differences: Canadians perceive that Roots has a very strong SLO. In contrast, Lululemon evokes the most polarized responses, with widely varied rankings by age, region, income level, and gender.

GENDER DIFFERENCES

Women give Lululemon a much higher SLO ranking than do men. In contrast, men rank Forever 21 much higher than women.

REGIONAL DIFFERENCES

Northern Canadians are most critical of clothing retailers overall and give them the lowest SLO scores whereas Central Canadians are most positive about clothing retailers and give them the highest SLO scores. Lululemon receives particularly high SLO rankings in Central and Atlantic Canada.

INCOME DIFFERENCES

Lululemon is highly ranked for those with annual incomes over \$50,000; it is lowest ranked for those with annual incomes under \$50,000. The relative ranking of Mark's declines with increasing income level whereas Roots is top-ranked in every income category. Those in the middle income range, with incomes of \$50,000–\$99,000/year, are the most positive about clothing retailers and give them the highest SLO rankings.

GENERAL OBSERVATIONS ABOUT SLO AND USAGE

In clothing retail, there is generally a strong correlation between perceived SLO and level of usage. In particular, Roots, Mark's, and HBC receive high SLO rankings and are also heavily used by respondents. There are two exceptions to this observation: although Old Navy receives a mid-range SLO ranking, it receives very high levels of usage; Lululemon is in the top tier of SLO rankings but receives much lower levels of actual usage.

TABLE 11: CLOTHING RETAIL — RELATIONSHIP BETWEEN SLO AND FREQUENCY OF USE (ordered from highest rank to lowest)

OVERALL SLO RANKING	USAGE
1 Roots	1 HBC
2 Mark's	2 Old Navy
3 HBC	3 Roots
4 Lululemon	4 Mark's
5 Gap	5 Forever 21
6 Old Navy	6 Gap
7 American Eagle	7 Lululemon
8 H&M	8 H&M
9 Forever 21	9 American Eagle

WHICH CLOTHING RETAILERS DO CANADIANS RANK HIGHEST IN TERMS OF SLO?

TOP TIER	Roots Mark's HBC Lululemon
MIDDLE TIER	Gap Old Navy American Eagle
LOWER TIER	H&M Forever 21

TABLE 12: CLOTHING RETAIL — GENDER DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

OVERALL	WOMEN	MEN
1 Roots	1 Roots	1 Roots
2 Mark's	2 Mark's	2 Forever 21
3 HBC	3 Lululemon	3 HBC
4 Lululemon	4 HBC	4 Mark's
5 Gap	5 Gap	5 Am. Eagle
6 Old Navy	6 Old Navy	6 H&M
7 Am. Eagle	7 Am. Eagle	7 Gap
8 H&M	8 H&M	8 Old Navy
9 Forever 21	9 Forever 21	9 Lululemon

TABLE 13: CLOTHING RETAIL — AGE DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

18–20	21–35	36–45	46+
1 Roots	1 Roots	1 Roots	1 Mark's
2 Old Navy	2 HBC	2 Am. Eagle	2 Roots
3 Gap	3 Mark's	3 Mark's	3 Lululemon
4 Am. Eagle	4 Gap	4 H&M	4 HBC
5 Lululemon	5 Lululemon	5 HBC	5 H&M
6 HBC	6 Am. Eagle	6 Lululemon	6 Old Navy
7 H&M	7 Old Navy	7 Forever 21	7 Forever 21
8 Mark's	8 Forever 21	8 Gap	8 Gap
9 Forever 21	9 H&M	9 Old Navy	9 Am. Eagle

TABLE 14: CLOTHING RETAIL — REGIONAL DIFFERENCES IN SLO RANKINGS

(ordered from highest rank to lowest)

WEST	CENTRAL	ATLANTIC	NORTH
1 Roots	1 Roots	1 Roots	1 HBC
2 Mark's	2 Mark's	2 Lululemon	2 Roots
3 HBC	3 Lululemon	3 Mark's	3 Mark's
4 Gap	4 Am. Eagle	4 HBC	4 H&M
5 Old Navy	5 HBC	5 Gap	5 Old Navy
6 Lululemon	6 Gap	6 Old Navy	6 Gap
7 Am. Eagle	7 H&M	7 Am. Eagle	7 Am. Eagle
8 H&M	8 Old Navy	8 Forever 21	8 Lululemon
9 Forever 21	9 Forever 21	9 H&M	

TABLE 15: CLOTHING RETAIL — INCOME DIFFERENCES IN SLO RANKINGS
 (ordered from highest rank to lowest)

UNDER \$50,000	\$50–99,000	\$100,000+
1 Roots	1 Roots	1 Roots
2 Mark's	2 Lululemon	2 Lululemon
3 HBC	3 Mark's	3 HBC
4 Am. Eagle	4 Gap	4 Mark's
5 Gap	5 HBC	5 Old Navy
6 Old Navy	6 Am. Eagle	6 Am. Eagle
7 Forever 21	7 Old Navy	7 Gap
8 H&M	8 H&M	8 H&M
9 Lululemon	9 Forever 21	9 Forever 21

FIGURE 4: CLOTHING RETAIL — COMPARISON OF SLO RANKINGS

(5 point scale, 1=highest ranking; 5=lowest)



KEY FINDINGS

SLO AND GOVERNMENT DEPARTMENTS AND SERVICES

OVERALL

- Parks Canada, National Museums, and the CBC are most **TRUSTED**
- Parks Canada, National Museums, and Natural Resources Canada are considered most **SUSTAINABLE and ENVIRONMENTALLY RESPONSIBLE**
- The CBC, National Museums, and the RCMP are considered most **SOCIALLY RESPONSIBLE and ETHICAL**

GENDER DIFFERENCES

Men are significantly more positive than women in their perception of the SLO of the RCMP and of Indigenous and Northern Affairs. Women are more positive than men in their perception of National Museums and Canada Post.

REGIONAL DIFFERENCES

Canadians in all regions give the CRA and Student Loan programs low rankings for SLO. Respondents in the West and the North give Indigenous and Northern Affairs a high ranking

and Justice a low ranking. In contrast, Atlantic Canadians give Justice a high SLO ranking. Western and Central Canadians give Immigration and Border Services lower SLO rankings than respondents in other regions. Respondents in the North are most polarized in their perceptions of SLO of government departments, giving the widest spread between the top-ranked (Environment) and lowest ranked (Service Canada) departments.

AGE DIFFERENCES

CBC, Indigenous and Northern Affairs, and the RCMP receive high SLO rankings from most age groups. Respondents aged 36+ give the lowest SLO ranking for Student Loans. Respondents aged 21–45 give lower SLO rankings for Border Services and Immigration than respondents in other age groups.

INCOME DIFFERENCES

Respondents in different income groups demonstrate considerable variation in SLO rankings but they are consistent in giving the Canada Revenue Agency a low ranking.

GENERAL OBSERVATIONS ABOUT SLO AND USAGE

In government departments and services, perceived high levels of trustworthiness, social responsibility, and sustainability do not seem to be strongly equated to frequency of use. Three of the four top-ranked departments/services in terms of perceived SLO (RCMP, National Museums, Parks Canada) have mid to low levels of actual use whereas the Canada Revenue Agency has high use, but a very low SLO ranking. However, three of the top four most-used government departments/services (Canada Post, the Canada Revenue Agency, and Service Canada) are essentially monopolies: Canadians likely use these departments or services because they have no other choice. These three government departments/services all receive mid to low SLO rankings. Only the CBC is very highly ranked in both perceived SLO and usage; Canadians choose to be part of the CBC audience from amongst a range of competitors and rank it highly for its social license.

TABLE 16: GOVERNMENT DEPARTMENTS AND SERVICES — RELATIONSHIP BETWEEN SLO AND FREQUENCY OF USE

(ordered from highest rank to lowest)

OVERALL SLO RANKING	USAGE
1 Museums	1 Canada Post
2 CBC	2 CBC
3 Parks	3 CRA
4 RCMP	4 Service Canada
...	...
13 Student Loans	12 RCMP
14 Immigration	13 Border Services
15 INAC	14 Immigration
16 Justice	15 Justice
17 CRA	16 Student Loans
	17 INAC

WHICH GOVERNMENT DEPARTMENTS AND SERVICES DO CANADIANS RANK HIGHEST IN TERMS OF SLO?

TOP TIER	Museums CBC Parks Canada RCMP Health Canada
MIDDLE TIER	Canada Post GAC (Global Affairs Canada) Environment Canada Natural Resources Border Services Stats Can Service Canada
LOWER TIER	Student Loans Immigration INAC (Indigenous and Northern Affairs) Justice CRA (Canada Revenue Agency)

TABLE 17: GOVERNMENT DEPARTMENTS AND SERVICES — GENDER DIFFERENCES IN SLO RANKINGS (ordered from highest rank to lowest)

OVERALL	WOMEN	MEN
1 Museums	1 CBC	1 RCMP
2 CBC	2 Parks	2 CBC
3 Parks	3 Museums	3 INAC
4 RCMP	4 Canada Post	4 Parks
...
13 Student Loans	13 Immigration	13 Justice
14 Immigration	14 Border Services	14 Natural Resources
15 INAC	15 Justice	15 Student Loans
16 Justice	16 INAC	16 Immigration
17 CRA	17 CRA	17 CRA

TABLE 18: GOVERNMENT DEPARTMENTS AND SERVICES — AGE DIFFERENCES IN SLO RANKINGS
(ordered from highest rank to lowest)

18–20	21–35	36–45	46+
1 RCMP	1 CBC	1 INAC	1 RCMP
2 Canada Post	2 INAC	2 CBC	2 Museums
3 Health	3 Parks	3 RCMP	3 CBC
4 INAC	4 Canada Post	4 Museums	4 Parks
...	5 GAC
14 CRA	13 Immigration	14 Border Services	6 Health
15 Museums	14 Service Canada	15 Immigration	...
16 Parks	15 Border Services	16 Student Loans	13 Student Loans
17 Service Canada	16 Justice	17 CRA	14 INAC
	17 GAC		15 Justice
			16 Natural Resources
			17 CRA

TABLE 19: GOVERNMENT DEPARTMENTS AND SERVICES — REGIONAL DIFFERENCES IN SLO RANKINGS (ordered from highest rank to lowest)

WEST	CENTRAL	ATLANTIC	NORTH
1 INAC	1 Museums	1 CBC	1 Environment
2 Environment	2 Service Canada	2 RCMP	2 INAC
3 GAC	3 Natural Resources	3 Justice	3 Health
4 RCMP	4 Parks	4 Stats Can	...
5 Health	14 Canada Post
...	13 Border Services	14 CRA	15 CRA
12 CRA	14 INAC	15 Natural Resources	16 Justice
13 Border Services	15 Student Loans	16 Canada Post	17 Service Canada
14 Stats Can	16 Immigration	17 Student Loans	
15 Justice	17 CRA		
16 Student Loans			
17 Immigration			

TABLE 20: GOVERNMENT DEPARTMENTS AND SERVICES — INCOME DIFFERENCES IN SLO RANKINGS (ordered from highest rank to lowest)

UNDER \$50,000	\$50–99,000	\$100,000+
1 CBC	1 Parks	1 Parks
2 Natural Resources	2 INAC	2 Environment
3 Museums	3 Health	3 Museums
4 RCMP	4 Environment	4 Natural Resources
5 Health	5 RCMP	5 CBC
...
13 Student Loans	13 Canada Post	14 Border Services
14 Border Services	14 Service Canada	15 Immigration
15 Justice	15 CRA	16 Justice
16 Environment	16 Student Loans	17 CRA
17 CRA	17 Natural Resources	