## maru/ PUBLIC OPINION

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#### Canada's Most Respected Grocery/Food Retailer 2023 Award ranked results:

Grocery/Food Retailer	2023 Rank	2021 Rank	Rank Change	Total Score
Costco	1	1	N/C	68.8
Metro	2	3	+1	59.6
Walmart	3	14	+11	59.3
Food Basics	4	9	+5	59.0
No Frills	5	6	+1	58.7
IGA	6	7	+1	57.7
Real Canadian Super Stores	7	4	-3	57.7
FreshCo	8	10	+2	56.3
Sobeys	9	5	-4	56.2
"Your Independent Grocer" (owned by National Grocers/Loblaw)	10	2	-8	55.7
Save-on Foods	11	11	N/C	54.7
Safeway	12	12	N/C	52.4
Loblaws	13	8	-5	52.3
Foodland	14	13	-1	50.0
Average score				57.0

Criteria for the CMR Grocery/Food Retailer 2023 Award is that it be recognized as a leading Canadian Grocery/Food Retailer by the Centre for the Study of Commercial Activity (CSCA) Top 100 Retail Sales (NAISC Code 445 Food & Beverage) and/or Statista Food Retailer data (Canada), operates in 4+ provinces, and is Canadian managed.

#### Methodology

These are the findings from a <u>Maru Public Opinion</u> survey conducted for <u>Canada's Most Respected Award Program</u>.

The survey was managed by the panel and data management experts at Maru Blue among 2,932 randomly selected Canadian adults who are members of the Maru Voice Canada online panel from June 26-27, 2023. The methodology ensures that the disproportionate sample sizes are balanced for the total results. The data has been weighted by education, age, gender, region, and language in Quebec, to match the population according to the most recent census data so that the sample is representative of the entire adult population of Canada. Because of the scoring formula, there are no percentages used in the output, nor is there a margin of error. The following introduction and questions are placed on a survey instrument for respondents:

Respect is a deep admiration or positive feeling about a combination of someone's characteristics, such as their abilities, qualities, values, actions, and/or achievements. Similarly, organizations can achieve respect based on what people perceive or experience about them— like what they make or do, how they treat employees or customers, what they communicate or contribute to society, how much they're trusted, how their leadership acts, and what's said about them in the media or even by family and friends.

The following is a list of **Grocery/Food Retailer organizations**. Based on your impression from what you have seen, read, heard, or personally experienced, please indicate if you RESPECT each of the following organizations and to what degree:

Choose One

The list of companies/entities is then provided to respondents in a randomized fashion. Each respondent completes the rating per entity provided for the scaled evaluation. If an entity has a significant sub-brand (s) in the same category/sector, each will be listed separately and evaluated on its own. As noted above, the list of entities provided to respondents for evaluation is randomized to create no unintentional bias.

Those respondents who choose the scale entry "Never heard of them" are subsequently removed from the data analysis. The data is then rebased to include only respondents aware of the entity evaluated. The "Respect Score" is then created by giving 100 points to those who choose "Very Much," 70 points for "Somewhat," 30 points for "Not Very Much," and 0 points for "Not At All." A mean score is determined using these values, ultimately giving a value between 0 to 100 for each entity. The scoring produces a ranked order whereby being at the top of the list determines that the entity is the "Most Respected."

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Panel and data services provider <u>Maru Blue</u> is deeply rooted in the Maru/HUB technology platform and offers on-demand, high-quality, highly scalable online community samples of deeply engaged, known respondents. Excerpts from this release of findings should be properly attributed, with interpretation subject to clarification or correction.

### **Detailed Results:**

CMR1. Based on your impression from what you've seen, read, heard, or personally experienced, please indicate if you respect them very much, somewhat, not very much or not at all: SUMMARY TABLE OF Top 2 Box combines respect "very much/somewhat"

		Province					
	Total	ВС	AB	MB/SK	ON	PQ	ATL
	A	М	N	0	Р	Q	R
BASE: All Respondents	2932	423	385	186	1241	515	182
BASE: WEIGHTED	2932	394	326	192	1117	693	211
Costco	2200	306	260	139	832	507	156
Walmart	1892	230	186	106	711	<b>526</b>	133
Sobeys	1684	193	226	126	655	343	141
IGA	1648	199	180	111	490	574	93
Loblaws	1591	185	188	98	622	395	103
Real Canadian Super Stores	1536	274	220	137	663	120	122
No Frills	1527	206	201	117	798	93	113
Metro	1480	85	53	25	720	541	57
"Your Independent Grocer" (owned by National Grocers/Loblaw)	1401	170	155	92	582	289	113
FreshCo	1251	170	132	101	712	91	45
Safeway	1193	257	226	126	416	102	65
<b>Food Basics</b>	1099	67	50	21	814	93	54
Save-on Foods	1034	295	224	125	273	70	48
Foodland	855	67	49	31	524	64	121

CMR1. Based on your impression from what you've seen, read, heard, or personally experienced, please indicate if you respect them very much, somewhat, not very much or not at all: SUMMARY TABLE OF Bottom 2 Box combines respect "not very much/not at all"

		Province					
	Total	ВС	AB	MB/SK	ON	PQ	ATL
	Α	M	N	0	Р	Q	R
BASE: All Respondents	2932	423	385	186	1241	515	182
BASE: WEIGHTED	2932	394	326	192	1117	693	211
Loblaws	1186	189	123	78	472	228	95
Walmart	1015	159	137	84	396	163	76
Sobeys	963	146	98	59	414	175	70
IGA	923	159	106	55	432	105	66
"Your Independent Grocer" (owned by National Grocers/Loblaw)	886	147	85	56	382	157	60
Safeway	875	129	96	60	403	122	65
Real Canadian Super Stores	826	116	105	53	368	115	70
No Frills	811	146	113	60	295	122	76
Metro	752	84	72	40	371	138	48
FreshCo	748	113	102	54	335	101	44
Foodland	744	63	62	42	417	98	61
Save-on Foods	690	95	98	61	293	100	43
Costco	665	83	64	45	270	151	52
Food Basics	566	66	53	29	274	99	45

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