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Canadians' Views on Canada Post Services

Survey Findings Report

Prepared for Public Services and Procurement Canada

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Canada 

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Date: September 2022

This public opinion research report presents the results of an online survey conducted by EKOS Research Associates Inc. on behalf of Public Services and Procurement Canada. The research study was conducted with 3,433 Canadians between April 15 and 30, 2022.

Cette publication est aussi disponible en français sous le titre *Points de vue des Canadiens sur les services de Postes Canada*.

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TABLE OF CONTENTS

| | |
|---|----|
| List of Tables | 4 |
| List of Charts | 4 |
| Summary | 5 |
| A. Background and Objectives | 5 |
| B. Methodology | 6 |
| C. Key Findings | 7 |
| D. Note to Readers | 10 |
| E. Political Neutrality Certification | 10 |
| Detailed Findings | 11 |
| A. Profile of Clients and Services Received or Used | 11 |
| B. Experiences with Services | 20 |
| C. Support for Changes in Postal Service | 27 |
| Appendices | 41 |
| A. Methodological Details | 41 |
| B. Survey Questionnaire | 46 |

LIST OF TABLES

Table 1: Where Respondents Live

Table 2: Who Respondents Are

Table 3: Type of Mail Delivery Service

Table 4: Distance to Post Office

Table 5: Tolerance for Price Increases for Stamps

Table 6: Target and Actual Number of Completed Cases (Region and Target Group)

Table 7: Response Rate

Table 8: Sample Characteristics

LIST OF CHARTS

Chart 1: Intensity of Use: Mail Delivery

Chart 2: Intensity of Use: Other Services

Chart 3: Impact of COVID on Usage of Services

Chart 4: Extent of Change in Use Since COVID

Chart 5: Extent of Interest in New Services

Chart 6: Satisfaction with Services

Chart 7: Attitudes about Postal Service

Chart 8: Challenges in Rural Areas

Chart 9: Perceived Value of a Stamp

Chart 10: Support for Community Mailboxes (Replacing Door-to-Door)

Chart 11: Further Support for Community Mailboxes (w parcel lockers)

Chart 12: Financial Model

Chart 13: Support for Approach to Financial Overruns

Chart 14: Support for Other Options

Chart 15: Tolerance for Distance to Post Office

Chart 16: View about Moratorium on Office Closures

Chart 17: Support for Options in Rural Settings (1)

Chart 18: Support for Options in Rural Settings (2)

SUMMARY

A. BACKGROUND AND OBJECTIVES

The [Canadian Postal Service Charter](#) describes the Government of Canada’s expectations regarding Canada Post’s service standards and related activities in providing postal services that ensure these remain universal, affordable, reliable, convenient, secure and responsive to the needs of consumers in Canada. The Government has committed to review the Canadian Postal Service Charter (established in 2009) every five (5) years to assess the need to adapt the Charter to changing requirements. In 2018, the government affirmed that Canada Post is expected to continue to meet the expectations laid out in the Charter.

This research is intended to capture the views of Canadians about the mail and their current expectations of Canada Post, especially in the wake of the COVID-19 pandemic, and Canada Post’s ongoing financial losses, in order to ensure that the evolution of this important public institution reflects their understanding of “quality service that Canadians can afford.”

This research will help the Government of Canada to better understand Canadians’ opinion of how Canada Post serves them today and how they wish to be served into the future to ensure that Canada Post services, and in particular the Service Charter, continue to meet the needs of Canadians.

Objectives

The research addresses:

- Current service delivery method and usage of postal services;
- Change in use of postal services, particularly in light of COVID-19;
- Perception of services and key service priorities;
- Understanding of the CPC funding shortfall and operations¹;
- Acceptance of change in postal delivery service;
- Perception of CPC brand, role in community and attachment;
- Examination of possible new business lines; and,
- Support for providing government funding to Canada Post in lieu of price increases/service reductions/job reductions.

¹ The operations of the Canada Post Group of Companies are funded by the revenue generated by the sale of its products and services, not taxpayer dollars. Canada Post recorded a loss before tax of \$779 million in 2020, was the third consecutive year of losses reported at Canada Post, even while delivering record-high Domestic Parcels volumes. Canada Post is forecasting ongoing losses into the future.

B. METHODOLOGY

The survey is comprised of 3,433 completed cases of Canadians, 18 years of age and older, including oversamples among Canadians living in British Columbia (555), the Atlantic provinces (100 or more in each: 663 in total), and the territories (104), as well as in rural areas outside of the territories (869). Also targeted were autonomous seniors² (948), those with a physical mobility limitation (515), individuals identifying as a visible minority (446), Indigenous (255) or a member of the LGBTQ2+ community (254).

The survey sample was randomly selected from the *Probit* panel, which is assembled using a random digit dial (RDD) process for sampling from a blended land-line cell-phone frame, which provides full coverage of Canadians with telephone access. As such, this panel is considered to be representative of the general public in Canada and margins of error can be applied. Fifteen percent of cases were collected by trained, bilingual interviewers, while the majority were collected through online self-administration.

The survey was administered in April 2022, with an average length of 15 minutes online (23 minutes by telephone) and a response rate of 25%. Details on the rate of participation can be found in Appendix A and the questionnaire is provided in Appendix B.

This randomly recruited probability sample carries with it a margin of error of +/-1.7% at a 95% confidence interval. Results are weighted to population proportions for region and type of community (urban/rural), age, and gender, and for those who are a visible minority or a member of the LGBTQ2+ community. Chi-square tests were used to compare subgroups to the remaining sample (e.g., Ontario vs. the rest of Canada; women vs. men).

² Defined as those 60 or older with no physical mobility limitation.

C. KEY FINDINGS

Below is a selected summary of findings. For further information, please refer to the Detailed Findings section of this report.

Postal Services Received

- Nearly equal proportions of Canadians receive their regular home mail at their door (35%) or in a community mailbox (31%). About one in five (21%) reported that they receive their mail in a centralized box in their apartment or condo. Fewer receive their mail in a rural mailbox at the side of the road (7%) or in a postal box at a post office or retail outlet (6%).
- Most Canadians (70%) reported living within 2.5 kilometres of the nearest post office. Just under one in five (17%) live between 2.5 and 5 kilometres of a post office. Fewer (9%) live between 5 and 15 kilometres, and 2% live a farther distance from a post office.
- About three in four Canadians send parcels or personal correspondence (76%), although the vast majority do so a few times a year. Personal correspondence is sent by 16% of Canadians on a monthly (12%) or daily (4%) basis. Few people pay their bills by mail; 76% never do and 16% do so a few times a year.
- Few Canadians report frequent use of postal services. Close to half or more never use postal services except to purchase stamps and collect and send parcels. While eight in ten Canadians picked up a parcel in the past year, 66% did so a few times over the year: 10% did so weekly or monthly. About three in four Canadians said they have bought stamps (72%) or picked up a parcel (76%), however, most did so more than a few times in the past year. Two in three Canadians have sent a parcel to friends or family in the past year (64%), although 61% did so a few times. Half have bought postage supplies at the post office a few times. About half returned an item purchased online (50%) or sent registered mail (44%), although very few did so more than a few times in the past year. Financial services were accessed by 5% of Canadians a few times in the past year, although this is higher among certain segments (visible minorities, those born outside of Canada, Indigenous Peoples).
- The majority of Canadians (66%) said they would probably (42%) or certainly (24%) be interested in using government services at their local post office like those offered at Service Canada outlets. Interest is lower in terms of becoming a client of Canada Post banking services, with one in five (19%) indicating they would probably (14%) or certainly (5%) use these.
- One in five Canadians (22%) changed the way in which they use Canada Post's services as a result of the COVID-19 pandemic. Most (83%) said they ordered parcels online more (57% did so a lot more). Nearly four in ten (39%) said they sent more parcels to friends and family, and 24% sent more letter mail during the pandemic.

Satisfaction and Perceptions

- Most Canadians (83%) are satisfied with the overall services offered by Canada Post, although this is lower than found in 2016 (91%). Satisfaction is also high in terms of the frequency of mail delivery (87%; 91% in 2016) and where they get their mail (85%; 88% in 2016). About three in four Canadians are satisfied with the delivery of parcels by Canada Post (79%; on par with 81% in 2016) and the speed of delivery of their mail (75%; lower than the 85% in 2016).
- Door-to-door mail delivery is considered by 92% to be essential for the elderly or people with mobility or health issues. Over eight in ten (84%) agree that it does not matter to them if a post office is a franchise in a pharmacy or a grocery store, or if it is owned and operated by Canada Post, as long as the prices and services are the same. Under half (43%) agree that that they would not notice if letter mail took twice as long to arrive, which is similar to the 44% reported in 2016, but a slight majority (56%) said they would notice, as was the case in 2016.
- Canadians are divided in their view of whether or not stamps are undervalued at the price of \$1.07 (or \$0.92 in a bulk purchase). In fact, equal proportions agree (42%) and disagree (42%) and just over one in four hold a strong view that stamps are (12%) or are not (15%) undervalued.
- Canadians are more amenable to a price increase for stamps if the delivery requires a longer distance. In fact, 27% are willing to pay up to \$2.00 for delivery of a letter across the country, although 22% are not open to an increase. When it comes to delivery within one's city or town, 65% are not open to an increase, although 14% are willing to pay \$1.25, and 13% are willing to pay \$1.50 or more.

Financial Models

- 73% of Canadians agree with federal government funding to maintain current service and 27% prefer services levels based on revenues.
- Canadians are amenable to government subsidies to address financial overruns, particularly in more costly rural and remote locations (76% supports). They are also supportive of less expensive franchise ownership models (75% supports).
- 64% of Canadians support a reduced frequency of letter delivery, and about the same level of support exists for parcel lockers. There is slightly less, but still majority support for a \$0.25 increase in stamp prices (60%).
- There is significant support for:
 - subsidizing postal services
 - leveraging less expensive franchise ownership models to replace corporate post offices owned and operated by Canada Post
 - reduced letter mail delivery service
 - parcel lockers
 - an increase in the price of stamps.

- When it comes to ending door-to-door delivery for everyone but the elderly and those with mobility issues, Canadians are divided, with nearly as many who oppose it as support it (55% are supportive; 29% strongly, while 43% oppose it; 26% strongly).
 - Opposition is more concentrated among those who currently receive delivery to the door (62% opposition), while those who are served by community mailboxes support this initiative (77% support).
- The majority of Canadians somewhat (19%) or strongly (35%) oppose the idea of converting their door-to-door mail and parcel delivery to community mailboxes with parcel lockers, even when presented with the caveat that the change would allow for secure delivery and prevent parcel theft.
- As with support for an overall reduction in letter mail delivery, 66% agree with delivery on fewer than five days per week.
- There is a significant divide among Canadians about whether everyone should shoulder the same cost for parcel delivery. Although half agree, 44% disagree.
- Overall, 45% of Canadians are willing to travel somewhat farther than they do now to go to the post office, although 49% are not. The large majority of those willing to travel farther currently live within 2.5 kms of their local post office and are willing to travel between 2.5 kms and 5 kms.

Rural Post Offices and Rural Points of View

- Among rural residents, 49% said the cost of shipping poses at least a moderate challenge. Related to this, support for everyone shouldering the same cost for parcel delivery is stronger among rural residents compared with other Canadians.
- About one in four to one in five see the hours of postal office operation (27%), and delivery times for parcels (25%) or mail (20%) as a moderate or greater challenge, as is the case for distance to the post office for 18%. Fewer (14%) view the location of post offices relative to other stores and services as a challenge.
- As suggested in earlier results, 77% of Canadians agree with allowing rural post offices to be replaced with a less expensive franchise model; support is lower amongst rural respondents (61%), but still a strong majority. Similarly, Canadians generally agree with updating the list of locations that are truly rural to ensure protection of only those post offices (76%). Canadians do not agree, however, that all controls should be removed when considering post office closures, where 60% disagree (31% strongly).
- Among six options presented to rural residents to improve reach, support is significant when it comes to providing access to other government services within rural post offices (89%) and creating service hubs where rural post offices are placed with other local businesses (85%). There is less support with regard to providing access to financial services within rural post offices (73%).
- Over half of rural residents support combining small rural post offices in adjacent geographical areas, including enhanced locker service (58%), or support extending hours of

operation to improve reach (56%). Rural residents are divided in their view about the need for more post offices, with equal numbers supporting (44%) or opposing (43%) the idea, although most do not hold strong views. In addition, 69% of rural residents oppose reducing the number of post offices as a means to reduce losses at Canada Post.

D. NOTE TO READERS

Detailed findings are presented in the sections that follow. Overall results are presented in the main portion of the narrative and are typically supported by graphic or tabular presentation of results. Results for the proportion of respondents in the sample who either said “don’t know” or did not provide a response may not be indicated in the graphic representation of the results in all cases, particularly where they are not sizable (e.g., 5% or less). Results may also not total to 100% due to rounding. In some questions, results are compared with a survey of 2,246 Canadians conducted in 2016.

Bulleted text is also used to point out any statistically and substantively significant differences between sub-groups of respondents. Key demographic patterns of interest are described throughout the report. Only differences that are statistically and substantively different (e.g., five percentage points from the overall mean) are presented.

Details of the methodology and sample characteristics can be found in Appendix A. The programmed survey instrument can be found in Appendix B.

E. POLITICAL NEUTRALITY CERTIFICATION

I hereby certify as Senior Officer of EKOS Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed by:



Susan Galley (Vice President)

DETAILED FINDINGS

A. PROFILE OF CLIENTS AND SERVICES RECEIVED OR USED

Where Respondents Live

Following is an unweighted distribution of the survey sample across all provinces and across the three territories combined. As shown in the breakdown by community size, Alberta residents are more likely than others across the country to live in cities than in suburban and rural communities, while Ontario residents cluster more in suburbia compared with other Canadians. Residents of Atlantic Canada are more apt to classify their community as rural compared with the rest of the country.

Table 1: Where Respondents Live

| Response | TOTAL | Urban | Suburban | Rural |
|------------------------------|----------------|----------------|--------------|--------------|
| Province (unweighted) | <i>n=3,433</i> | <i>n=1,786</i> | <i>n=769</i> | <i>n=869</i> |
| British Columbia | 16% | 16% | 19% | 14% |
| Alberta | 10% | 12% | 7% | 9% |
| Saskatchewan | 3% | 3% | 1% | 4% |
| Manitoba | 4% | 4% | 2% | 3% |
| Ontario | 27% | 27% | 35% | 19% |
| Quebec | 18% | 19% | 20% | 14% |
| New Brunswick | 6% | 6% | 4% | 8% |
| Nova Scotia | 7% | 4% | 6% | 14% |
| Prince Edward Island | 3% | 2% | 2% | 6% |
| Newfoundland & Labrador | 3% | 3% | 2% | 5% |
| Territories | 3% | 3% | 1% | 4% |

Who respondents are

Following are distributions of the sample across age cohorts, and target or minority groups, as well as by household income. The breakdown of each segment based on where they live (i.e., urban, suburban or rural) helps the reader to better understand the demographic patterns described in the remainder of the report. For example, younger Canadians are more often clustered in urban areas, whereas those who are older are more often found in suburban and rural communities. As a result, different age groups experience different delivery service and distance to a post office which likely shapes their views and experiences. The same patterns arise with each of the minority groups (e.g., members of the LGBTQ2+ community are more often found in urban areas).

Table 2: Who Respondents Are

| Response | TOTAL | Urban | Suburban | Rural |
|-------------------------------------|---------------|---------------|-----------------|--------------|
| Age | <i>n=3433</i> | <i>n=1786</i> | <i>n=769</i> | <i>n=869</i> |
| Under 35 years | 27% | 29% | 28% | 16% |
| 35-44 years | 17% | 17% | 18% | 13% |
| 45-54 years | 16% | 15% | 18% | 13% |
| 55-59 years | 8% | 7% | 9% | 9% |
| 60-64 years | 9% | 9% | 9% | 13% |
| 65 or older | 23% | 22% | 18% | 35% |
| Autonomous seniors | 4% | 4% | 3% | 6% |
| Physical mobility limitation | 13% | 13% | 11% | 16% |
| Visible Minority | 21% | 24% | 24% | 6% |
| Indigenous | 4% | 4% | 3% | 6% |
| LGBTQ2+ | 9% | 10% | 8% | 4% |
| Total household income | <i>n=3433</i> | <i>n=1786</i> | <i>n=769</i> | <i>n=869</i> |
| Under \$20,000 | 5% | 6% | 3% | 5% |
| \$20,000 to just under \$40,000 | 11% | 12% | 7% | 13% |
| \$40,000 to just under \$60,000 | 12% | 13% | 10% | 12% |
| \$60,000 to just under \$80,000 | 12% | 13% | 11% | 10% |
| \$80,000 to just under \$100,000 | 12% | 12% | 10% | 14% |
| \$100,000 to just under \$150,000 | 19% | 17% | 24% | 18% |
| \$150,000 and above | 18% | 17% | 24% | 13% |
| Don't know / No response | 12% | 11% | 12% | 16% |

Type of Mail Delivery Service

Nearly equal proportions of Canadians receive their regular home mail at their door (35%) or in a community mailbox (31%). About one in five (21%) receive their mail in a centralized box in their apartment or condo. Considerably fewer receive their mail in a rural mailbox at the side of the road (7%) or in a postal box at a post office or retail outlet (6%). By comparison, in 2016, fewer (27%) reported having mail delivered to their door. A similar proportion receives mail in a community mailbox (32%), and 26% in a centralized box in the building, a postal box (11%), or rural mailbox (4%).

Those who live in the city are apt to receive their mail at the door (45%) or a centralized box in their apartment or condo (31%) compared with other Canadians. Those in the suburbs tend to receive their mail in a community mailbox (53%). Rural respondents are apt to say they receive their mail in a rural mailbox at the side of the road (32%) or a postal box at a post office or retail outlet (27%).

Table 3: Type of Mail Delivery Service

| Response | TOTAL | Urban | Suburban | Rural |
|--|---------------|---------------|--------------|--------------|
| Q1. How do you receive regular mail at home? | <i>n=3433</i> | <i>n=1786</i> | <i>n=769</i> | <i>n=869</i> |
| To your door | 35% | 45% | 28% | 7% |
| In a community mailbox | 31% | 21% | 53% | 30% |
| In a centralized box in your apartment building or condo | 21% | 31% | 10% | 5% |
| In a rural mailbox at the side of the road | 7% | 1% | 5% | 32% |
| In a postal box at a post office or retail outlet | 6% | 1% | 4% | 27% |

- Differences in the method of delivery are strongly influenced by where Canadians live. Regionally, those in British Columbia (30%) are more likely than those in any other region to say they receive their mail in a centralized box in their apartment or condo. Those in Alberta are apt to say they use a community mailbox (47%) than other Canadians. Respondents in Saskatchewan or Manitoba are more likely than others to report they receive their mail at their door (42%) or in a postal box in a post office or retail outlet (15%). Residents of Nova Scotia (18%) are more likely to receive their mail in a rural mailbox at the side of the road.
- Younger respondents under age 35 are more likely than those who are 35 or older to receive their mail in a centralized box in their apartment or condo (28%). Those aged 45-54 are apt to live in areas where they receive mail at their door (41%) compared with other age groups.

Respondents aged 55-64 are more likely than others to say they receive their mail in a community mailbox (35%).

Distance to Post Office

Most Canadians (70%) reported living within 2.5 kilometers of the nearest post office. One in six (17%) live between 2.5 and 5 kilometers of a post office. Few (9%) live between 5 and 15 kilometres, and 2% live farther from a post office.

Naturally, those living in cities have a shorter distance to travel to their nearest post office; 78% travel 2.5 kilometers or less. Canadians living in suburbs are more likely than other Canadians to say a post office is between 2.5 and 5 kilometers (22%). Rural Canadians are apt to be between 5 and 15 kilometers (27%), or more than 15 kilometers (10%) from a post office compared with others. While rural post offices are less likely to be close to a post office than those in cities and suburbs, 44% of rural respondents reported that they are within 2.5 kilometers or less of a post office.

Canadians who live 2.5 kilometers or less from their nearest post office are more apt to receive their mail by delivery to their door (77%) or in their building (81%) compared with other Canadians.

Table 4: Distance to Post Office

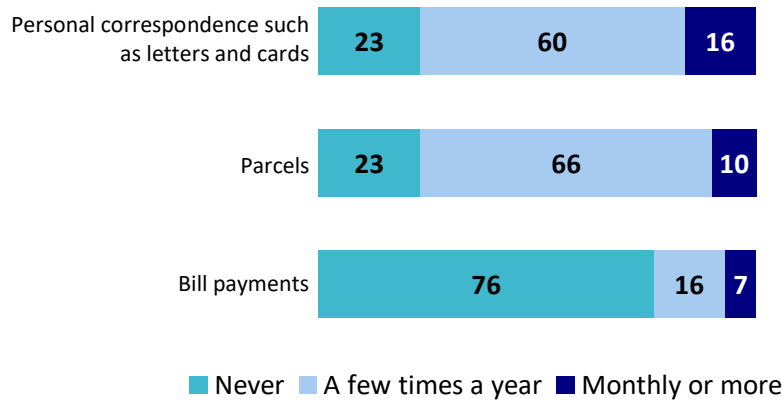
| Response | TOTAL | Urban | Suburban | Rural |
|---|---------------|---------------|-----------------|--------------|
| <i>Q2. How far from your home is your nearest post office?</i> | <i>n=3433</i> | <i>n=1786</i> | <i>n=769</i> | <i>n=869</i> |
| 2.5 km or less | 70% | 78% | 68% | 44% |
| More than 2.5 km, but less than 5km | 17% | 15% | 22% | 19% |
| Between 5 and 15 km | 9% | 4% | 7% | 27% |
| More than 15 km | 2% | 0% | 0% | 10% |
| Don't know / No response | 3% | 3% | 3% | 0% |

- Younger Canadians (under age 35) (74%) are more likely than their older counterparts to say their post office is within 2.5 kilometers or less.

Intensity of Use: Mail Delivery

Three in four Canadians (76%) send parcels or personal correspondence (72%), although the majority (66% and 60%, respectively) do so a few times a year. Fewer pay their bills by mail; 76% never do and of those who do, the majority (16%) do so a few times a year.

Chart 1: Intensity of Use: Mail Delivery



Q3a-c. How often do you send the following things by mail?

Base: n=3433

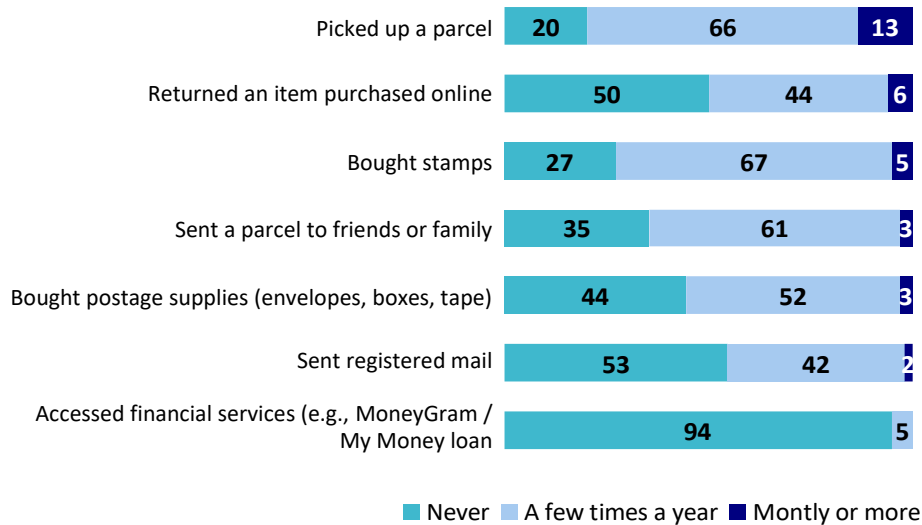
- Sending personal correspondence is more common among:
 - Residents of British Columbia and Nova Scotia or Prince Edward Island as well as those using a P.O. Box and rural residents (83% for each). Older Canadians (55 and over) are more likely than those who are younger to send personal correspondence (84% to 88%). This is also the case among those with limited mobility (82%).
 - Canadians who never send personal correspondence more often include those in Quebec (29%), those who receive their mail in a building (27%), men (28%), those under age 35 (36%), and those who identify as a visible minority (31%).
- Paying bills online is more common among:
 - Rural residents (32%), older Canadians (55 and over; 28% to 36%), and those with limited mobility (30%).
 - Least apt to pay bills by mail are those under age 35 (12%) or 35-44 (16%).

- Sending parcels is more common among:
 - Residents of the territories (93%), Saskatchewan and Manitoba (83%), British Columbia (81%) and Alberta (81%). This is also the case among those 45 to 54 (81%), members of the LGBTQ2+ community (83%), and Indigenous Peoples (82%). Those with higher household income: \$100,000 and up are also more likely to send parcels (82%) than those reporting less income.
 - Canadians with lower household income are least likely to send parcels (68%), as is the case with residents of Quebec (68%).

Intensity of Use: Other Services

Purchase of stamps, and the sending and receiving of parcels occur with the greatest frequency, but very few Canadians report frequent use of postal services. Close to half or more of Canadians never use postal services except to purchase stamps, and collect and send parcels. Parcel pick up was reported more frequently than any other activity: 13% weekly or monthly. Just over seven in ten Canadians said they have bought stamps (72%) or picked up a parcel (79%) at the post office in the past year, although 67% and 66%, respectively have done so a few times. Two in three Canadians (64%) have sent a parcel to friends or family a few times in the past year, although nearly all of these have done so a few times. Half have bought postage supplies at the post office (55%; mostly doing so a few times). Half returned an item purchased online (50%; 44% a few times) or sent registered mail (44%) in the past year. Financial services were accessed by 5% of Canadians; reporting usage of a few times in the past year, although higher among some segments (e.g., visible minorities, those born outside of Canada, Indigenous Peoples).

Chart 2: Intensity of Use: Other Services



Q4a-g. How often have you done any of the following at the post office in the past year?

Base: n=3433

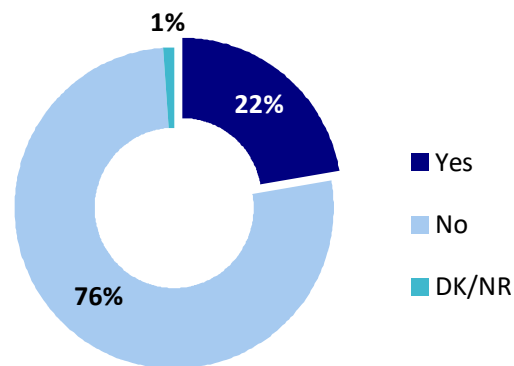
- Most likely to have bought stamps are residents of the territories (82%), rural residents (82%), those with a P.O. Box (83%), women (76%), and individuals who are 55 and over (81% to 88%).
- Parcel pickup is most common among residents of the territories (97%: 42% monthly or more often), Alberta (89%; 20% monthly or more often), those in rural areas (86%; 30% monthly or more often), those using a P.O. Box (94%; 51% monthly or more often) and Canadians under age 44 (83% to 85%). It is least common among those with no limitation on mobility (74%) and autonomous seniors (71%).
- Those likely to have sent a parcel to friends or family include residents of the territories (84%), British Columbia (76%), and Nova Scotia or Prince Edward Island (73%), those using a P.O. Box (73%), rural respondents (72%), and Indigenous Peoples (82%). This is least common in Quebec (49%).
- Residents of the territories (73%) and members of the LGBTQ2+ community (62%) are more likely to have bought postage supplies.
- Respondents more likely to go to the post office to return an item purchased online include residents of Ontario (54%), and suburban residents (57%), as well as individuals with a community mailbox (54%), those under age 54 56% to 60%), visible minorities (56%), and individuals reporting household incomes of \$100,000 or higher (60%).

- Those who send registered mail are more likely to live in Quebec (51%), or be 45 to 54 years of age (52%), visible minorities (55%), individuals outside of Canada (58%), or Indigenous Peoples (55%).
- Accessing financial services is more likely among visible minorities (13%), those born outside of Canada (13%), and Indigenous Peoples (9%).

Impact of COVID on Usage of Services

One in five Canadians (22%) reported that they changed the way in which they use Canada Posts services over the course of the pandemic.

Chart 3: Impact of COVID on Usage of Services



Q6. Has the COVID-19 pandemic changed how you use Canada Post's services in any way?

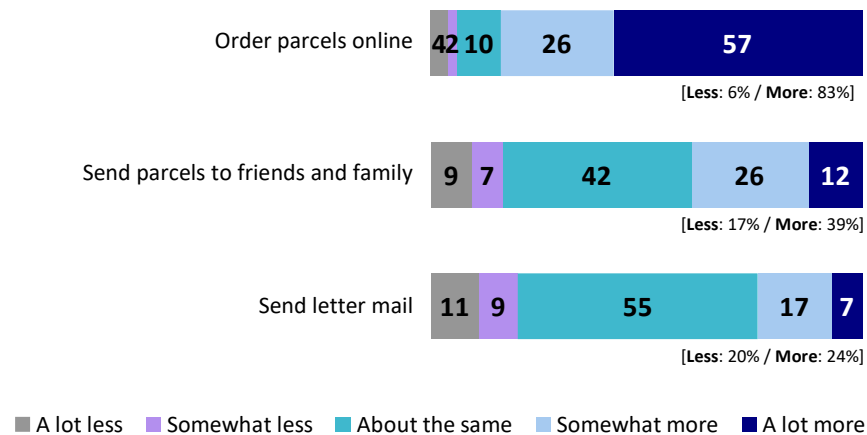
Base: n=3433

- Change was most likely among:
 - Those under age 35 (27%).
 - Indigenous Peoples (31%), and members of the LGBTQ2+ community (29%).
 - Canadians with a P.O. Box (30%).
- Least likely to have made a change are:
 - Seniors (65+) (82% did not).
 - Canadians in New Brunswick (86% did not), Saskatchewan and Manitoba (84%) and Nova Scotia and Prince Edward Island (82%).
 - Households reporting incomes of \$40,000 to \$60,000 (83% did not).

Extent of Change in Use Since COVID

Among the 22% of Canadians who said the COVID-19 pandemic changed how they use Canada Posts services, most indicated they ordered somewhat (26%) or a lot (57%) more parcels online (83% more overall). Nearly four in ten (39%) said they sent more parcels to friends and family, and 24% sent more letter mail during the pandemic.

Chart 4: Extent of Change in Use Since COVID



Q7a-c. Do you do each of the following more, about the same, or less, compared to before the pandemic...?

Base: n=728: changed how they use Canada Post services since COVID-19

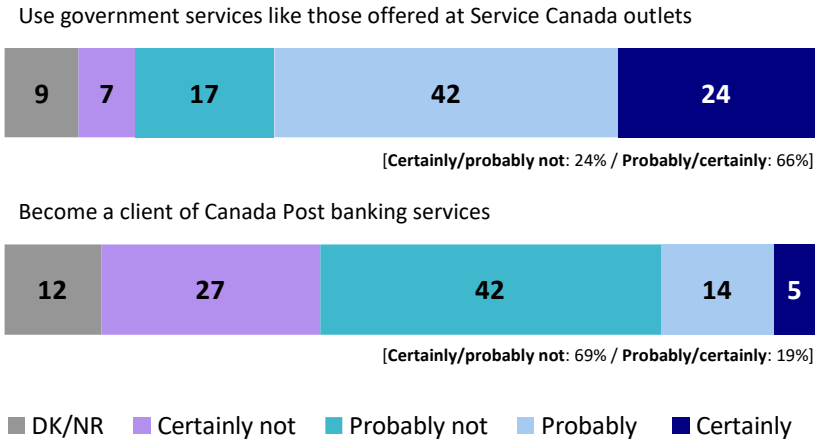
- Younger Canadians, under age 35, are more likely to say they did more of each activity compared to before the pandemic. Those aged 55 and over, along with Canadians with limited physical mobility, are apt to say they did less of all three.
- Canadians reporting household incomes of \$100,000 or more are more likely to say they sent the same amount of letter mail (65%) while those reporting less than \$40,000 are apt to be divided in sending more (33%) or sending less (29%) mail.
- Those with over \$100,000 in household income are more likely than those with lower income to say they ordered more (94%) parcels online. These higher income Canadians are also more likely to have sent the same (49%) number of parcels to friends and family compared with those reporting less household income.
- Residents of Quebec are more likely than those in other regions to say they sent fewer (25%) parcels to friends and family. Members of the LBGTQ2+ community are more likely to say they sent more (57%) parcels to friends and family.

B. EXPERIENCES WITH SERVICES

Extent of Interest in New Services

The majority of Canadians (66%) said they would certainly (24%) or probably (42%) be interested in using government services at their local post office like those offered at Service Canada outlets. Interest is lower in terms of becoming a client of Canada Post banking services, with one in five indicating they would certainly (5%) or probably (14%) use these.

Chart 5: Extent of Interest in New Services



Q5a. How likely would you be to make use of these services if they were offered at your local post office?

Base: n=3433

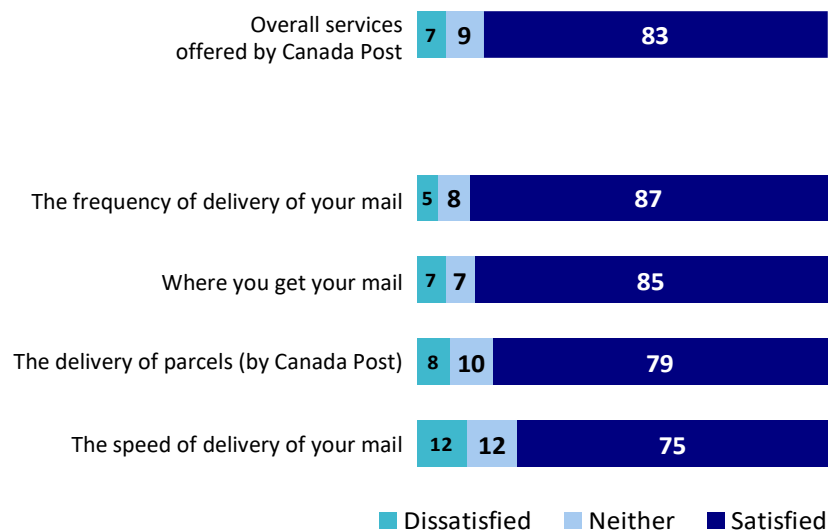
- Interest in banking services is:
 - Highest in Quebec (25% certainly or probably would use them).
 - Lowest in New Brunswick, Saskatchewan and Manitoba, and Alberta (37%, 35% and 33%, respectively certainly would not)
 - Lower where community mailboxes are used (31% certainly would not)
 - Lower among seniors (65+) (32% certainly would not)
 - Higher among those not born in Canada (32% certainly or probably would), visible minorities (29%) and where household income is lowest (under \$40,000) (26%).

- Interest in government services is:
 - o Higher in Ontario (31% certainly would), and among those not born in Canada, visible minorities, and members of the LGBTQ2+ community (30% to 31% certainly would).
 - o Lower among seniors and rural residents (9% and 10% respectively certainly would not)

Satisfaction with Services

Most Canadians (83%) are satisfied with the overall services offered by Canada Post, although the proportion is lower than found in 2016 (91%: 59% very satisfied). Satisfaction is also high in terms of the frequency of mail delivery (87%) and where they get their mail (85%). Each of these is also marginally lower than the 91% and 88%, respectively found in 2016. About three in four Canadians are satisfied with the delivery of parcels by Canada Post (79%; on par with 81% in 2016) and the speed of delivery of their mail (75%; lower than the 85% in 2016).

Chart 6: Satisfaction with Services



Q9a-d. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services?

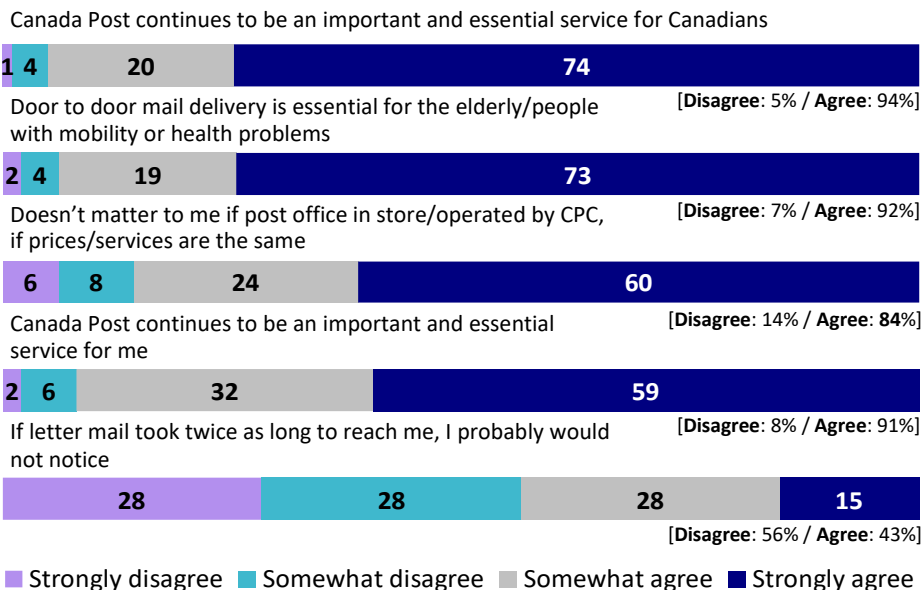
Base: n=3433 (speed: n=1682; frequency: n=1751)

- In general, satisfaction with these attributes is higher among residents of Quebec, those who receive mail at their door, and women. Those with limited physical mobility are less satisfied.
- Satisfaction with “where you get your mail” is higher among:
 - Residents of New Brunswick (91%), Quebec (89%), and British Columbia (88%).
 - Canadians who live in cities (87%), along with those who receive their mail at the door (95%), and those do not have limited physical mobility (86%).
 - Dissatisfaction is somewhat higher among those living in Nova Scotia and Prince Edwards Island (13%), and those receiving mail at a community mailbox (14%).
- Satisfaction with the speed of mail delivery is higher among:
 - Residents of New Brunswick (89%) and Quebec (83%), along with those who receive their mail at the door (81%).
 - Dissatisfaction is highest among residents of Alberta (18%), and those receiving mail at a P.O. Box (19%).
- Satisfaction with the frequency of delivery is higher among:
 - Residents of Quebec (93%), those who receive their mail at the door (91%), and individuals with no limitations on physical mobility (88%).
- Satisfaction with the delivery of parcels by Canada Post is higher among:
 - Residents of New Brunswick (86%) and Quebec (83%), along with those who receive their mail at the door (86%).
 - Dissatisfaction is more pronounced among residents of the territories (19%), Alberta (15%) and Newfoundland and Labrador (14%), and those receiving mail at a P.O. Box (12%).
- Satisfaction with the overall services offered by Canada Post is more notable among:
 - Residents of Quebec and New Brunswick (89% for each), those with delivery to the door (90%).
 - Dissatisfaction is more pronounced among residents of Alberta and the territories (14% in each), as well as among Indigenous respondents (12%).

Attitudes about Postal Service

Canada Post continues to be an important and essential service for more than nine in ten Canadians (for Canadians: 94%, for me: 91%). Door-to-door mail delivery is also considered essential for the elderly or people with mobility or health issues (92%). Over eight in ten (84%), however, do not care if a post office is in a pharmacy or a grocery store, or if it is operated by Canada Post, as long as the prices and services are the same. Canadians are divided about the importance of speed of delivery, with just under half (43%: on par with 44% in 2016) agreeing that that they would not notice if letter mail took twice as long to arrive, but a slight majority (56%: on par with 2016) saying they would notice.

Chart 7: Attitudes about Postal Service



Q10b-e. To what extent to you agree or disagree with the following statements?

Base: n=3433 (Continues to be important to me: n=1706/to Canadians: n=1727)

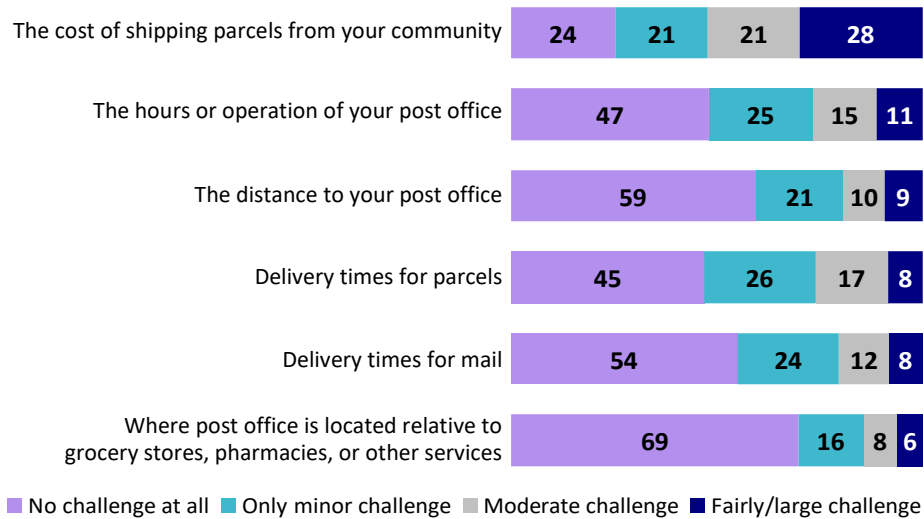
- Agreement that Canada Post continues to be an important and essential service for Canadians is more likely to be higher among residents living in Quebec (99%) and British Columbia (97%), along with women (97%).
- Those who agree that Canada Post continues to be an important and essential service to them are apt to live in the city (93%), receive delivery to their door (94%), or are women (93%).

- Agreement that the ownership structure of the post office does not matter is higher among those who live in the suburbs (88%) or city (85%), along with those who receive their mail at the door.
 - Rural respondents (25%) and those who receive their mail in rural settings (24%) or a P.O. Box (28%), as well as Indigenous Peoples (21%) are apt to disagree with this statement.
- Residents of Quebec (95%), along with those who live in a city (94%) or receive their mail at the door (96%) are more likely to agree that door-to-door mail delivery is essential for the elderly and people with mobility or health issues. This is also true among women (94%).
- Men (47%) are more likely than women (40%) to agree that they probably would not notice if a letter took twice as long to reach them. Rural respondents (61%), as well as those aged 45-64 (60%) are apt to disagree.

Challenges in Rural Areas

Among rural residents in the sample, the cost of shipping parcels poses the most significant challenge, with half of households (49%) saying it poses at least a moderate challenge (28% indicating cost to be a fairly sizable or large challenge). One in four sees the hours of postal office operation (26%), and delivery times for parcels (25%) as a moderate or greater challenge. One in five feels this way about delivery times for mail (20%), and distance to the post office (19%). Fewer (14%) experience the location of post offices, relative to other stores and services, as a challenge.

Chart 8: Challenges in Rural Areas



Q11a-f. How much of a challenge do each of the following pose to you personally when accessing Canada Post services?

Base: n=869: Rural residents

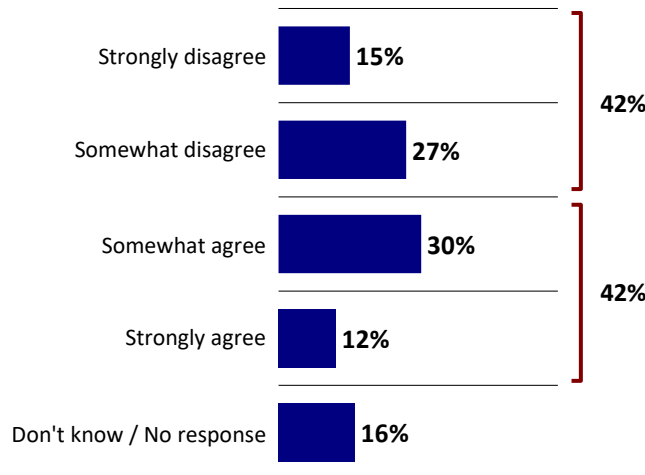
- The cost of shipping parcels is most likely to be a challenge among:
 - Residents of Alberta (64% saying moderate or greater challenge), Saskatchewan or Manitoba (57%).
 - It is also more often poses a moderate or greater challenge among residents of Newfoundland and Labrador (55%; 45% seeing it as a fairly significant or greater challenge), those receiving door service (61%; 41% seeing it as a significant or greater challenge), those with limited mobility (57%; 41% seeing it as a significant or greater challenge), and Indigenous Peoples (54%; 40% seeing it as a significant or greater challenge), as well as among women (53%; 34% seeing it as a significant challenge) and seniors (52%; 35% seeing it as significant).
- Other issues are more apt to pose at least a moderate challenge to:
 - Residents of British Columbia (distance: 24%, delivery times for parcels: 30%, and location: 19%)
 - Residents of the territories (distance: 33%, hours of operation: 37%)
 - Those 45 to 54 years of age (hours of operation: 40%, delivery times for mail: 31%, location: 22%)
 - Those under 35 (delivery times for parcels: 33%)
 - Individuals with limited mobility (distance: 28%, location: 22%, delivery times for mail: 22%)

- o Those reporting household incomes of \$100,000 or higher (hours of operation: 33% and delivery times for mail: 25%)
- o Indigenous Peoples (location: 22%)

Perceived Value of a Stamp

Canadians are divided in their view of whether or not stamps are undervalued at the price of \$1.07 (or \$0.92 in a bulk purchase). In fact, equal proportions agree and disagree (42%), and just over one in four hold a strong view about stamps being undervalued (12%) or not (15%).

Chart 9: Perceived Value of a Stamp



Q12. To what extent do you agree or disagree with the following statement? At a cost of \$1.07 per stamp for delivery anywhere in Canada or \$0.92 when you buy a booklet of 10, domestic stamps are under-priced for their value.

Base: n=3433

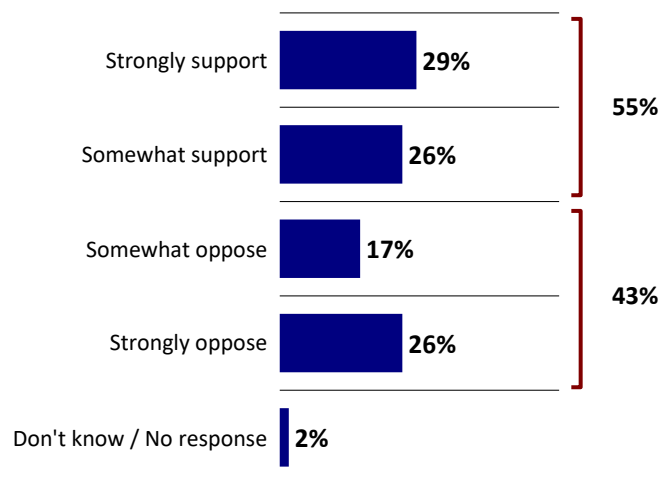
- Most likely to agree are residents of Quebec (52%), and men (48%).
- Most likely to disagree are:
 - o Residents of Newfoundland and Labrador (59%), Nova Scotia and PEI (53%), Alberta (52%), and the territories (51%).
 - o Rural residents in general (48%) and those with community mailboxes (47%) or rural service or a P.O. Box (48% each).
 - o Women (48%), those 45 to 54 (48%) and seniors (49%), those with limited mobility (51%), and Indigenous Peoples (49%).

C. SUPPORT FOR CHANGES IN POSTAL SERVICE

Support for Community Mailboxes (w parcel lockers)

A majority (55%) of Canadians support ending door-to-door home delivery and replacing it with community mailboxes, costing half the price to service, for everyone except the elderly and those with mobility or health challenges. Just over one in three (36%) Canadians who currently receive mail delivery at the door, however, support this option (compared with 77% of Canadians who currently receive mail delivery at a community mailbox).

Chart 10: Support for Community Mailboxes (Replacing Door-to-Door)



Q16c. Do you support or oppose this change: End door-to-door home delivery and replace it with community mailboxes for everyone except the elderly and those with mobility or health challenges.

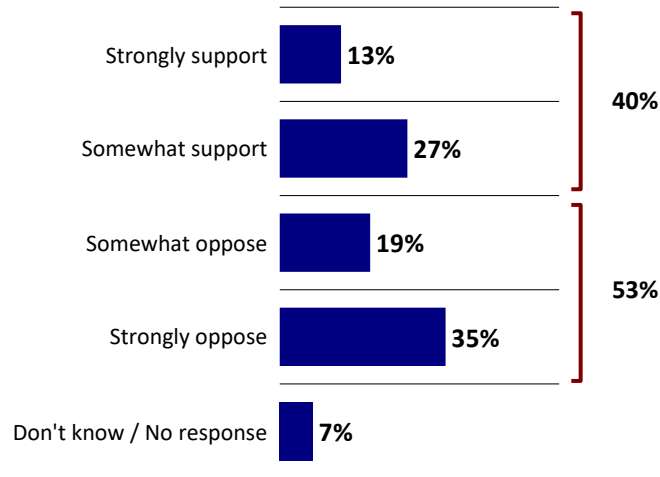
Base: n=3433

- The strongest support is found among:
 - Residents of Alberta (66%), Newfoundland and Labrador (67%) and Nova Scotia or PEI (64%).
 - Those using a community mailbox (77%), suburban (64%) and rural (62%) residents, as well as individuals reporting household incomes of \$100,000 or more (60%).
- It is more often opposed by:
 - Residents of Quebec (49%), city-dwellers (48%), and those receiving door services (62%)

- o Individuals 45 to 54 years of age (49%), members of the LGBTQ2 community (52%) and those reporting household incomes of less than \$40,000 (51%).

When asked the question from a mail security perspective, rather than financial savings, a slight majority (53%) of Canadians continue to strongly (35%) or somewhat (19%) oppose the idea of converting door-to-door mail and parcel delivery to community mailboxes with parcel lockers. This is even when presented with the caveat that the change would allow for secure delivery and prevent parcel thefts. Two in five (40%) support the idea (13% strongly and 27% somewhat), which is slightly higher (40% vs 36%) than when proposed in order to reduce Canada Post's losses.

Chart 11: Further Support for Community Mailboxes (w parcel lockers)



Q8. Given the increase in e-commerce deliveries, and parcel thefts (“porch pirates”), would you support conversion of your door-to-door mail and parcel delivery to secure and convenient community mailboxes that include parcel lockers?

Base: n=1079: Receive mail at the door

- Residents of Quebec are more likely than those in any other region to say they would support (52%) community mailboxes with parcel lockers.
- Support for community mailboxes with parcel lockers is also higher among Canadians under age 35 (53% support).
- Opposition is highest in Nova Scotia or Prince Edward Island (69%), and among Canadians between the ages of 45 and 54 (63%), seniors (62%), and those with a physical mobility challenge.

Canadians are more amenable to a price increase for stamps on letters that are being sent farther away. In fact, 27% are willing to pay up to \$2.00 for delivery of a letter across the country. More than half of Canadians (56%) would be willing to pay \$1.50 or more. Letter mail delivery within a province is still something for which 18% would be willing to pay \$1.50. When it comes to delivery within one’s city or town, however, two in three Canadians (65%) are not open to an increase for letter mail, although 14% are willing to pay \$1.25, and 13% are willing to pay \$150 or more.

Table 5: Tolerance for Price Increases for Stamps

| What is the maximum amount you feel is reasonable to pay for a single stamp to deliver a letter within the following areas? | Within your city or town | Within your province | Across the country |
|---|--------------------------|----------------------|--------------------|
| <i>n</i> = | 3433 | 3433 | 3433 |
| \$1.00 | 65% | 37% | 22% |
| \$1.25 | 14% | 25% | 15% |
| \$1.50 | 8% | 18% | 22% |
| \$1.75 | 1% | 4% | 7% |
| \$2.00 | 4% | 9% | 27% |
| Don't know / No response | 8% | 7% | 7% |

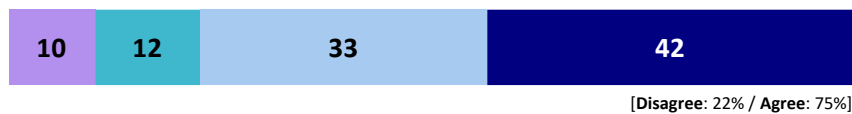
- Willingness to accept an increase within the province or across the country is typically higher among:
 - Those under 35, and individuals reporting household incomes of \$100,000 or more.
 - Men and those considering themselves to be members of a visible minority or the LGBTQ2+ community.
- Those most resistant to an increase are residents of the Atlantic and rural residents, as well as those who are 55 or older, individuals with limitations in physical mobility and those reporting household incomes of \$40,000 or less.

Financial Model

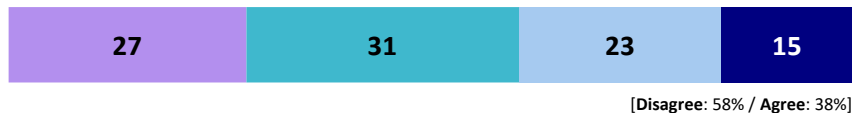
According to survey results, Canadians are considerably more supportive of federal government funding to maintain current service levels than they are of service levels driven by Canada Post revenues alone. Three in four agree with the idea of a subsidy (42% strongly; 10% strongly disagree). On the other hand, 38% agree that service levels should be driven by revenues, while 58% disagree (27% strongly). One in five (20%) said they agree with both ideas, and another 4% disagreed with both. When forced to choose, overall results indicate that 73% of Canadians agree with federal government funding to maintain current service and 27% prefer services levels based solely on revenues.

Chart 12: Financial Model

Canada Post should receive federal government funding to maintain current service levels and prices across the country



Canada Post should provide only the level of service it can pay for with its own revenue



■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree

Q14a-b. To what extent do you agree or disagree with the following statements?

Base: n=3433

- While high across the board, agreement with provision of government funding to maintain the current level of service is typically higher among:
 - Residents of the territories (82%) compared with other across the country, and those receiving mail delivery in an apartment or condo (78%).
 - Women (77%), those under 35 (77%), as well as among those reporting household incomes under \$40,000 (78%) and members of the LGBTQ2+ community (84%).
- More likely to support levels of service driven by Canada Post revenues alone are suburban residents (31%), who receive mail at a community mailbox (32%), men (31%), those who are 45 to 65 (31%), and autonomous seniors (31%).

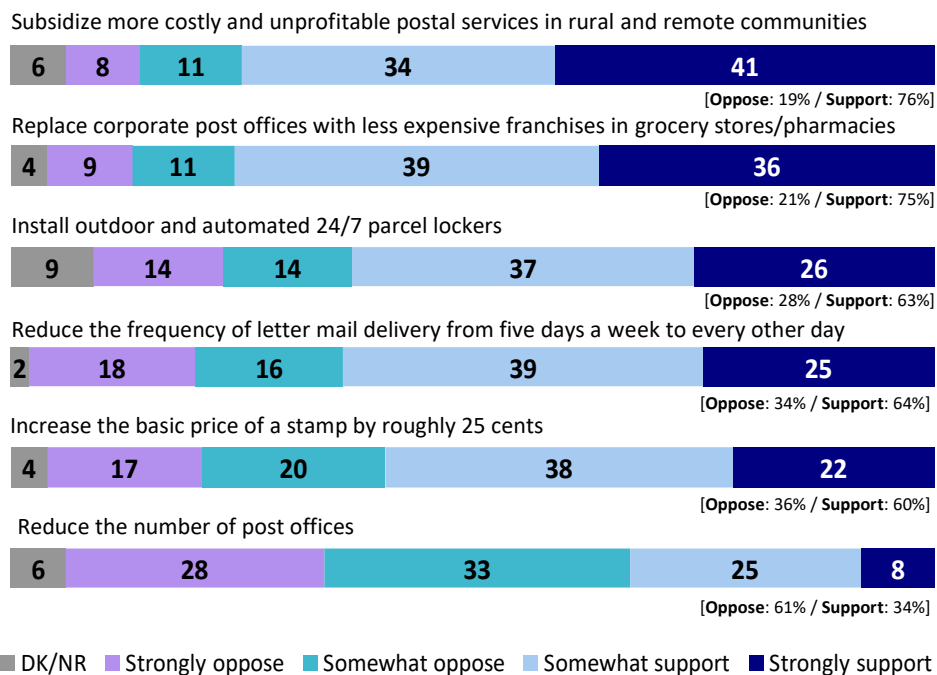
Support for Approach to Financial Losses at Canada Post

As shown previously in the report, when asked about potential approaches to addressing financial losses, Canadians are amenable to government subsidies, particularly in more costly rural and remote locations (75% support: 41% strongly, with 19% opposition). They are also not wed to corporate post offices, and therefore supportive of less expensive franchise ownership models (75% support: 36% strongly, with 20% opposition).

Although support is more tepid, two in three Canadians support reduced frequency of letter delivery (64% support, but 25% strongly, and nearly as many are strongly opposed to it). The same level of support exists for parcel lockers (63%). There is slightly less support for an increase in stamp prices (60%).

While support is significant and opposition is limited when it comes to subsidizing postal services; using alternative space; reducing letter mail delivery; using parcel lockers; and even increasing the price of stamps, opposition to a reduction of the number of offices (61%) far outweighs the level of support (33%).

Chart 13: Support for Approach to Financial Overruns



Q16ab-dg. Do you support, or oppose these changes.

Base: n=3433

- Consensus is strongest with regard to subsidies for rural services, with members of the LGBTQ2+ standing out as more supportive (85%).
- Use of less expensive franchise space is even more popular among those under 35 (81%), while opposition is more concentrated among:
 - Residents of the territories (42%), those living in rural areas (33%), clients receiving mail through P.O. boxes (35%).
 - Indigenous Peoples (27%) and those reporting household incomes of less than \$40,000 (27%).
- Reducing the frequency of letter mail is more likely to be:
 - Supported by those receiving door services, those 45 to 54, and individuals reporting household incomes of \$100,000 or higher (69% of each segment).
 - Opposed by rural residents (40%), those using P.O. Boxes (41%), Indigenous Peoples (40%) and individuals reporting household incomes of \$40,000 (42%).
- Parcel lockers are more popular with:
 - Suburban residents (70%), those using a community mailbox (69%) or delivery within their building (69%).

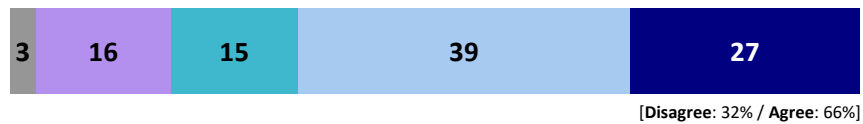
- Individuals under 35 (78%) or 35 to 44 (68%), visible minorities (70%) or those reporting household incomes of \$100,000 or higher (70%).
- Parcel lockers are more often opposed by:
 - Residents of New Brunswick (35%), and rural residents (34%).
 - Those receiving delivery to their door (35%), individuals who are 55 or older (32% to 39%), autonomous seniors (36%), those with mobility limitations (37%), Indigenous Peoples (36%) and those reporting household incomes of \$40,000 (34%).
- A price increase on stamps is more often supported by:
 - Those under 35 (69%) or 35 to 44 (65%), members of the LGBTQ2+ community (70%) and individuals reporting household incomes of \$100,000 or higher (69%).
- Opposition to price increases are more often:
 - Residents of Nova Scotia or Prince Edward Island (42%), and rural residents (43%).
 - Those 55 or older (43% to 47%), autonomous seniors (46%), individuals with mobility limitations (50%), and those reporting household incomes of less than \$40,000 (48%).
- A reduce number of post offices is more often supported by:
 - Residents of New Brunswick (43%), those living in suburban areas (41%) and individuals reporting household incomes of \$100,000 or more (41%).
- Reduced locations are more likely to be opposed by:
 - Residents of the territories (72%), rural residents (69%), and those using a P.O. Box (71%).
 - Members of the LGBTQ2 community (73%), those reporting household incomes of less than \$40,000 (72%), and individuals with mobility issues (67%).

Support for Other Options

As with support for an overall reduction in letter mail delivery, two in three Canadians agree with delivery on fewer than five days per week (66% support: 27% strongly, although 16% are strongly opposed). Canadians are divided about whether everyone should shoulder the same cost for parcel delivery, regardless of the distance. Although half agree (51%: 23% strongly), 44% disagree. Among both those who agree and those who disagree, considerably fewer are strongly entrenched in their view.

Chart 14: Support for Other Options

Canada Post should be allowed to deliver letters less frequently than five days a week to reduce costs



All Canadians should shoulder the same cost (i.e., rate) for parcel delivery, regardless of the distance



■ DK/NR ■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree

Q17a-b. Do you agree or disagree with the following statements relating to Canada Post Services?

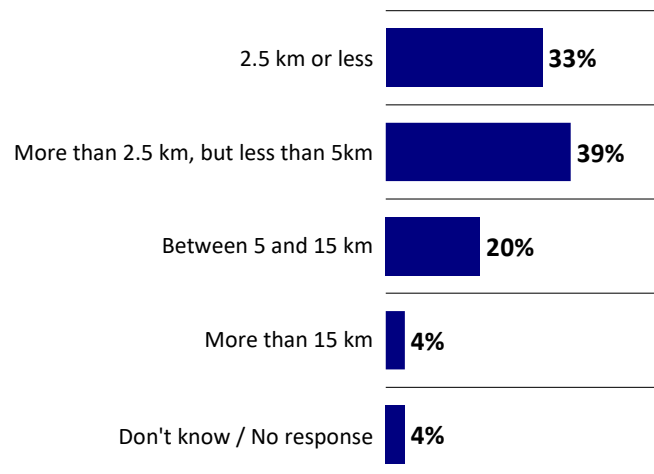
Base: n=3433

- While there is strong consensus regarding reduced frequency of delivery, agreement is stronger among those reporting household incomes of \$100,000 or higher (71%). Disagreement is more prominent among those using P.O. Boxes (37%), Indigenous Peoples (40%), and those reporting the least household income (41%).
- Those more likely to agree with all Canadians shouldering the same cost are:
 - Residents of the territories (67%), Nova Scotia and Prince Edward Island, or Newfoundland and Labrador (62%), in rural areas (58%), those using P.O. Boxes (58%).
 - 65 or older or have a mobility limitation (57% in each segment)
- Disagreement about shouldering the same costs is more often higher among those under 35 and individuals reporting household incomes of \$100,000 or higher (49% in each segment).

Tolerance for Distance to Post Office

Overall, 72% of Canadians are willing to go up to five kilometers to their nearest post office (33% within 2.5 kilometers and 39% between 2.5 and 5 kilometers). Naturally, this aligns with the 67% of Canadians who currently have a post office within this distance. Looking at tolerance for travel based on respondents' current distance to a post office, 45% of Canadians are willing to travel somewhat farther than they do now, although half (49%) are not. The large majority of those willing to travel farther live within 2.5 kms of their local post office and are willing to travel between 2.5 kms and 5 kms (85% of those willing to travel any distance farther than they do currently). Willingness to travel farther than they do now diminishes with their current distance to the post office.

Chart 15: Tolerance for Distance to Post Office



Q18. What is the furthest you are willing to travel to a post office?

Base: n=3433

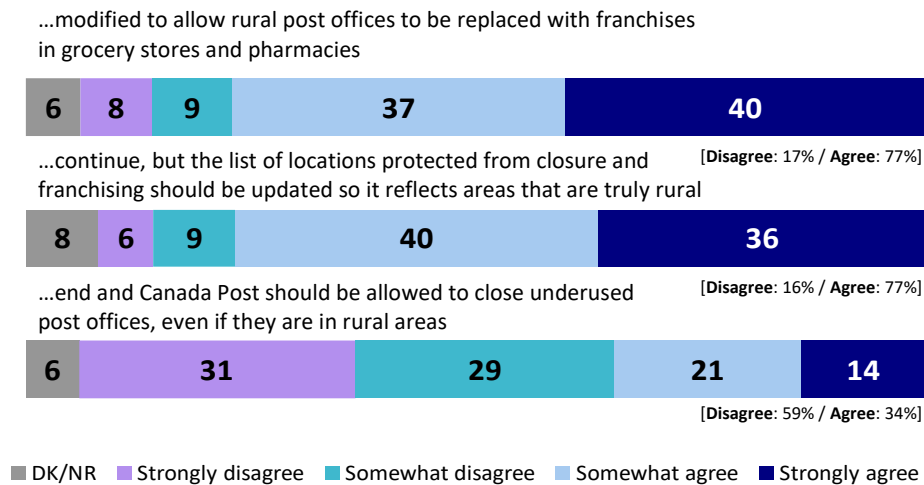
- Those least willing to travel farther to a post office than they do now are:
 - Residents of the territories (70%) and Quebec (58%), as well as those currently receiving rural delivery service (57%).
 - Those who are 55 years of age or older (55% to 61%), autonomous seniors (57%) and those with mobility limitations (61%).
 - Indigenous Peoples (55%), those born outside of Canada (56%) and individuals reporting household incomes of less than \$40,000 (62%).
- Individuals most likely to be willing to travel farther are:

- Residents of British Columbia (51%), suburban residents (54%), those receiving delivery to community mailboxes (50%).
- Those under 35 years of age (58%), or 35 to 44 (53%), as well as individuals reporting household incomes of \$100,000 or higher (54%).

View about Moratorium on Office Closures

As suggested in earlier results, Canadians are largely in agreement with modifying rural post offices to less expensive, franchise options (77% agree: 40% strongly, with 8% strong opposition). Similarly, Canadians generally agree with updating the list of locations that are truly rural to ensure protection of only those post offices (77% agree: 36% strongly, with 6% strong opposition). Canadians do not agree, however, that all controls should be removed when considering post office closures, with 60% disagreeing with this (31% strongly), compared with 35% who disagree.

Chart 16: View about Moratorium on Office Closures



Q19a-c. Do you agree or disagree with the following statements: The moratorium should...?

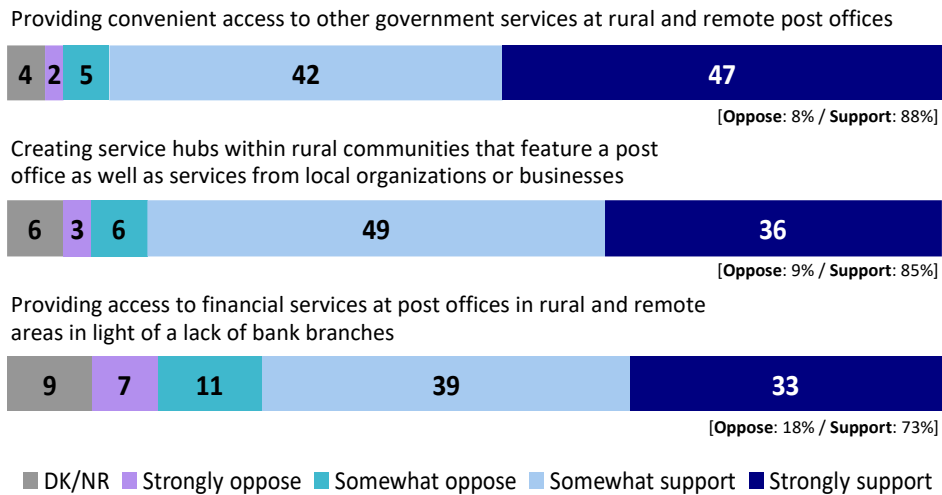
Base: n=3433

- There is strong consensus regarding an updated list of rural post offices protected from closure, with no particular segment standing out as more supportive or opposed to this idea.
- Use of franchises is more popular among suburban residents (83%), those using a community mailbox (81%), visible minorities (81%) and those reporting household incomes of \$100,000 or higher (82%).
- Opposition to franchises is greater among rural residents (33%), particularly those using a P.O. Box (35%), as well as residents of Newfoundland and Labrador (24%), New Brunswick (23%), and Nova Scotia and PEI (21%). This is also true of Indigenous Peoples (29%) and members of the LGBTQ2+ community (25%), as well as those reporting household incomes of less than \$40,000 (23%).
- Ending the moratorium is typically more popular in Alberta (39%), the suburbs (40%), those using community mailboxes (39%), visible minorities (41%) those reporting household incomes of \$100,000 or higher (41%).
- Opposition to ending the moratorium, however, is more likely in British Columbia (65%), in rural areas (69%), and among P.O. Box users (69%), as well as among members of the LGBTQ2+ community (68%), and individuals with household incomes of less than \$40,000 (68%).

Support for Options in Rural Settings

Among six options presented to rural residents to improve reach, support is strong in terms of providing access to other government services within rural post offices (88%: 47% strongly). This is also the case with creating service hubs where rural post offices are placed with other local businesses (85% support: 36% strongly). Close to three in four also support providing access to financial services within rural post offices (73% support: 33% strongly, with 7% strong opposition and 9% who are unsure).

Chart 17: Support for Options in Rural Settings (1)



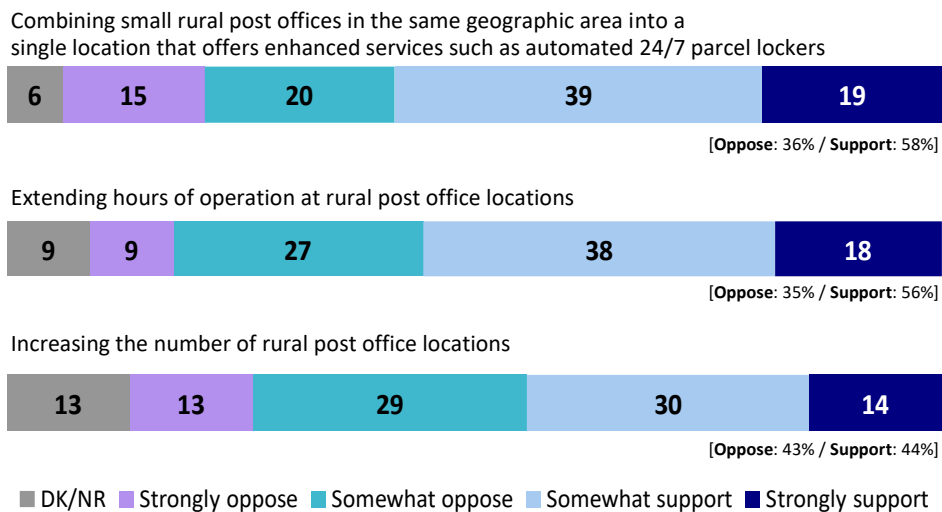
Q20a-g. Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas?

Base: n=905: Rural residents

- Combined access with other government services received strong consensus, although more often supported among those under 35 (95%).
- Service hubs are more popular among those under 35 (92%), although opposition is greater among residents of the territories and Newfoundland and Labrador (23% in each).
 - Opposition is also slightly higher than average in household incomes of less than \$40,000 (14%).
- Combined access with financial services is more popular among those with mail delivery to their door (89%), or in their building (86%), as well as those under 35 (85%), Indigenous Peoples (87%), and members of the LGBTQ2 community (87%).
 - Opposition is stronger in Saskatchewan or Manitoba (37%), and those receiving rural delivery service (24%).

Just over half (58%) of rural residents support combining small rural post offices in the same area, with enhanced locker service (19% strongly supportive), however, 35% are opposed to this. While just over half support (56%: 18% strongly) extending hours of operation as an option to improve reach, 35% are opposed to it. Although previous results suggested that Canadians are opposed to a reduction in the number of post offices, rural residents are divided in their view about the need for more post offices, with as many supporting the idea (44%), as opposing it (43%). Although most do not hold entrenched views, it is interesting to note that support is somewhat stronger among those who currently live more than 15kms from a post office (56%).

Chart 18: Support for Options in Rural Settings (2)



Q20a-g. Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas?

Base: n=905: Rural residents

- Increasing the number of locations receives more support in British Columbia (55%), among visible minorities (62%), and Indigenous Peoples (56%). Opposition is greatest in Nova Scotia and Prince Edward Island (56%), as well as Quebec (50%).
- Extending hours of operation is more often supported among those who currently received delivery at their door (68%), as well as among those under 35 (67%) and those 35 to 44 (64%).
 - Opposition is more prominent among in Nova Scotia and Prince Edward Island (46%) and individuals who are 65 or older (44%).

- Combining rural locations in the same geographic area is more often supported by those who currently receive delivery at their door (69%), as well as among those under 35 (70%) and those 35 to 44 (67%), along with visible minorities (75%).
 - Opposition is greater among those currently using a P.O. Box (45%), and seniors (and autonomous seniors) (41%).

APPENDICES

A. METHODOLOGICAL DETAILS

The survey is comprised of 3,433 completed cases of Canadians, 18 years of age and older, including oversamples among Canadians living in British Columbia (555), the Atlantic provinces (100 or more in each: 663 in total), or the territories (104), as well as in rural areas outside of the territories (869). Also targeted were autonomous seniors³ (948), those with a physical mobility limitation (515), individuals identifying as a visible minority (446), Indigenous (255) or a member of the LGBTQ2+ community (254).

Testing and Administration

A draft of the questionnaire was provided by the Project Authority at PSPC for review by EKOS Research. Following several rounds of review and slight revisions, the questionnaire was finalized, programmed and translated. Prior to conducting the survey, the instrument was tested with 41 cases, with roughly half collected by telephone and half collected online (21 cases conducted in English and 20 in French). Additional questions were placed on the pretest version of the online questionnaire asking about length, flow, clarity of wording and so on to elicit feedback from respondents. Minimal changes were made as a result of the testing, although a few questions were removed in order to stay within the intended survey length.

The survey was administered between April 15 and 30, 2022, using a bilingual questionnaire, installed on a secure web-server controlled by EKOS. The email invitation included a description and purpose of the survey (in both languages) along with a link to the survey website. The survey database was mounted using a Personalized Identification Number (PIN), so only individuals with a PIN were allowed access to the survey (the PIN was included in the email invitation). The questionnaire was prefaced with a brief introduction to the study and rationale for the research. The voluntary and confidential nature of the survey was also emphasized. Survey data collection adhered to all applicable Government of Canada standards for public opinion research conducted online and by telephone. All invited panel members were informed of their rights under current Privacy legislation, as well as how to obtain a copy of their response and results of the survey conforming to current privacy legislation. The questionnaire length averaged 15 minutes online and 23 minutes by telephone.

³ Defined as those 60 or older with no physical mobility limitation.

Sample Source and Response Rate

The survey sample was randomly selected from the *Probit* panel, which is assembled using a random digit dial (RDD) process for sampling from a blended land-line cell-phone frame, which provides full coverage of Canadians with telephone access. The distribution of the recruitment process is meant to mirror the actual population in Canada (as defined by Statistics Canada). As such, our more than 120,000 active member panel can be considered representative of the general public in Canada (meaning that the incidence of a given target population within our panel very closely resembles the public at large) and margins of error can be applied. Ten percent of the sample was collected with cell phone only sample. This sample source used for more than 90% of the sample, with a small sub-set of respondents in key target groups obtained from a targeted Random-digit dial (RDD) sample. Fifteen percent were collected by trained, bilingual interviewers, while the majority were collected through online self-administration.

This randomly recruited probability sample carries with it a margin of error of +/-1.7% at a 95% confidence interval. The margin of error for each of the target groups is between 3.5% and 9.0%. Table 6 below presents the target, as well as actual number of completed cases for each region and target group in the sample. Final results are weighted to population proportions for region and type of community (urban/rural), age, and gender, and for those who are a visible minority or a member of the LGBTQ2+ community. Chi-square tests were used to compare subgroups to the remaining sample (e.g., Ontario vs. the rest of Canada; women vs. men).

Table 6: Target and Actual Numbers of Completed Cases (Region & Target Group)

| Region | Target Sample n= | Actual Sample n= |
|--|-----------------------------|---------------------------------|
| British Columbia | 545 | 555 |
| Alberta | 350 | 354 |
| Saskatchewan & Manitoba | 220 | 224 |
| Ontario | 900 | 924 |
| Quebec | 595 | 609 |
| Atlantic (Nova Scotia, New Brunswick, Newfoundland and Labrador, Prince Edward Island) | 600 | 663 |
| Territories (Nunavut, Northwest Territories and Yukon) | 100 | 104 |
| Total | 3,300 | 3,433 |

| Target Segments | Target Size | Actual Sample Size |
|---|-------------|--------------------|
| Rural | 750 | 869 |
| Autonomous seniors (60+) | 435 | 948 |
| Visible minority/racialized communities | 385 | 446 |
| Those with limited mobility | 229 | 515 |
| Indigenous Peoples | 200 | 255 |
| LGBTQ2+ | 200 | 254 |

As shown in the following table, the response rate among Probit sample members who completed the survey online or by telephone is 24.5%, based on the number of cases completed or screened out as ineligible divided by the valid sample used. In the RDD sample the response rate is 5.1%.

Table 7: Response Rates

| Outcome | Panel | RDD |
|---------------------------|---------------|--------------|
| Total | 13,444 | 8,454 |
| Invalid | 268 | 1,072 |
| Valid Sample | 13,176 | 7,382 |
| Non-responding | 9,301 | 5,316 |
| Refusal | 521 | 1,671 |
| Partial complete | 133 | 24 |
| Total non-response | 9,955 | 7,011 |
| Ineligible/quota filled | 96 | 63 |
| Complete | 3,125 | 308 |
| Response rate | 24.5% | 5.1% |

The database was reviewed following data collection for data quality, outliers, coding requirements, weighting and construction of independent variables, and was used to explore sub-group patterns (e.g., by age, gender and so on) in the analysis. Weighting of the sample was based on population parameters according to the latest Census on age, gender and region of the country as well as among those who are Indigenous, and/or members of the LGBTQ2+ community.

Sample Characteristics

The following table presents an unweighted and weighted sample profile for the survey.

Table 8: Sample Characteristics

| | Unweighted Total | Weighted Total |
|---|-----------------------------|---------------------------|
| <i>Age</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| Under 35 years | 19% | 27% |
| 35-44 years | 17% | 17% |
| 45-54 years | 19% | 16% |
| 55-64 years | 20% | 17% |
| 65 or older | 25% | 23% |
| <i>Gender</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| Male | 51% | 48% |
| Female | 49% | 50% |
| Prefer to self-describe/not to say | 1% | -- |
| <i>Physical mobility limitation</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| Yes | 15% | 13% |
| No | 86% | 86% |
| Prefer not to say | -- | 1% |
| <i>Assistance or accommodation from Canada Post</i> | <i>n=515</i> | <i>n=469</i> |
| Yes | 6% | 7% |
| No | 94% | 93% |
| <i>First language learned and still understood</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| English | 77% | 72% |
| French | 18% | 20% |
| Western European languages | 3% | 3% |
| South Asian languages | 1% | 2% |
| Southeast Asian languages | 1% | 2% |
| <i>Total household income</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| Under \$20,000 | 5% | 5% |
| \$20,000 to just under \$40,000 | 11% | 11% |
| \$40,000 to just under \$60,000 | 12% | 12% |
| \$60,000 to just under \$80,000 | 12% | 12% |

| | Unweighted Total | Weighted Total |
|--|-----------------------------|---------------------------|
| \$80,000 to just under \$100,000 | 12% | 12% |
| \$100,000 to just under \$150,000 | 19% | 19% |
| \$150,000 and above | 17% | 18% |
| Don't know / No response | 12% | 12% |
| <i>Born in Canada</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| Yes | 84% | 80% |
| No | 15% | 20% |
| <i>Minority groups</i> | <i>n=3,433</i> | <i>n=3,433</i> |
| Member of a visible minority or racialized community | 13% | 21% |
| Person with a disability | 14% | 13% |
| Member of the LGBTQ2+ community | 7% | 9% |
| Indigenous people | 7% | 4% |
| None of the above | 62% | 57% |
| Prefer not to say | 4% | 3% |

In terms of non-response bias, a comparison of the unweighted sample with 2016 Census figures from Statistics Canada suggests that there are similar sources of systematic sample bias in the survey, following patterns typically found in most general public surveys. There is an underrepresentation of those under 35 in the sample (19%) relative to the population (27%). There is also an underrepresentation of those who are visible minorities (13% compared with the population (21%), as well as those born outside of Canada (15% versus 20% in the population).

B. SURVEY QUESTIONNAIRE

WINTRO

Online

Thank you for agreeing to participate in this study on behalf of the Government of Canada about Canada Post. The purpose of the survey is to obtain input so the Government can fulfil its commitment to conduct a regular review of the Canadian Postal Service Charter to assess the need to adapt postal services in Canada to changing requirements. Your views will help the Government "*Ensure that Canada Post provides the high-quality service that Canadians expect at a reasonable price and better reaches Canadians in rural and remote areas.*". None of the questions asked should constitute an indication of future direction, policies, or active consideration.

Si vous préférez répondre au sondage en français, veuillez cliquer sur français.

Your participation is optional and your responses will be kept entirely confidential and anonymous. The survey takes 15 minutes to complete. It is being directed by EKOS Research, and is being administered according to the requirements of the Privacy Act. To view our privacy policy, [click here](#). This survey is registered with the Canadian Research Insights Council's (CRIC) Research Verification Service. [Click here](#) if you wish to verify its authenticity (project code 20220407-EK933)

If you require any technical assistance, please contact online@ekos.com. An accessible version of the survey is also available at the following link [Accessible version](#), or you can contact us by telephone at 1-800-388-2873 to conduct the survey.

PINTRO

Phone

NOTE TO INTERVIEWER: Read the introduction in the language in which the respondent answers the phone.

Hello, my name is _____ and I am calling from EKOS Research Associates. We are conducting a survey on behalf of the Government of Canada about Canada Post.

Would you prefer to be interviewed in English or French?/Préférez-vous répondre en français ou en anglais?

The purpose of the survey is to obtain input so the Government can fulfil its commitment to conduct a regular review of the **Canadian Postal Service Charter** to assess the need to adapt postal services in Canada to changing requirements. Your views will help the Government "*Ensure that Canada Post provides the high-quality service that Canadians expect at a reasonable price and better reaches Canadians in rural and remote areas.*". None of the questions asked should constitute an indication of future direction, policies, or active consideration. This confidential survey takes about 15 minutes.

Your participation is voluntary. It is being administered according to the requirements of the *Privacy Act*. Results will not be reported on an individual basis. The survey is also registered

with the Research Verification Service of the Canadian Research Insights Council if you wish to verify its authenticity.

May I please speak to the person in the household that deals with the mail?

IF NEED BE: If you have additional questions, you can reach a supervisor at EKOS Research Associates Research at 1-800-388-2873.

Before proceeding, please ensure you are in a safe place to conduct the interview.

May we begin with the survey?

IF ASKED LENGTH: The survey will take about 15 minutes to complete

IF ASKED: This survey is registered with the Canadian Research Insights Council's (CRIC) Research Verification Service. Visit <https://canadianresearchinsightscouncil.ca/rvs/home/?lang=en> if you wish to verify its authenticity (project code 20220407-EK933).

| | |
|----------------------------|---|
| Continue | 1 |
| Refuse (THANK & TERMINATE) | 9 |

PRIV

Phone

This call may be recorded for quality control or training purposes.

QPROV

Our survey is directed at adults of different regions, age groups and characteristics.

For classification purposes, can you tell <[PHONE]me[ELSE]us> in which province or territory do you currently reside?

<[PHONE]INTERVIEWER: respondent province - _____

> <[PHONE]IF NEEDED: > Rest assured that all the information you provide will be kept strictly confidential and will be used for the sole purposes of this research.

| | |
|---------------------------|----|
| Newfoundland and Labrador | 10 |
| Prince Edward Island | 9 |
| Nova Scotia | 8 |
| New Brunswick | 7 |
| Quebec | 6 |
| Ontario | 5 |
| Manitoba | 4 |
| Saskatchewan | 3 |
| Alberta | 2 |
| British Columbia | 1 |
| Yukon | 11 |
| Northwest Territories | 12 |
| Nunavut | 13 |
| Prefer not to say | 99 |

QPOSTC

And more specifically, what are the first three digits of your **postal code**?

| | |
|-------------------|----|
| (Format: A1A) | |
| Please specify : | 77 |
| Prefer not to say | 99 |

QREGION

Are you currently living in ... <[PHONE](READ)>

| | |
|-------------------|----|
| A city | 1 |
| A suburb | 2 |
| A rural area | 3 |
| Prefer not to say | 99 |

QAGEY

In which of the following age categories do you belong?

<[PHONE]INTERVIEWER: READ LIST

| | |
|--|----|
| > | |
| Under 18 | 98 |
| 18-24 years | 1 |
| 25-34 years | 2 |
| 35-44 years | 3 |
| 45-54 years | 4 |
| 55-59 years | 5 |
| 60-64 years | 6 |
| or 65 or older | 7 |
| <[PHONE](DO NOT READ)> Prefer not to say | 99 |

QSEX

How do you identify your gender?

| | |
|--------------------------|----|
| Male | 1 |
| Female | 2 |
| Prefer to self-describe: | 77 |
| Prefer not to say | 99 |

QDISAB

Do you have a condition limiting your physical mobility?

| | |
|-------------------|---|
| Yes | 1 |
| No | 2 |
| Prefer not to say | 9 |

QASSIST

Do you receive assistance or accommodation from Canada Post, for how you receive mail?

| | |
|-------------------|---|
| Yes | 1 |
| No | 2 |
| Prefer not to say | 9 |

Q1

How do you receive regular mail at home? Is it...?

<[PHONE]INTERVIEWER: READ LIST

| | |
|--|---|
| > Select only one. | |
| To your door | 1 |
| In a centralized box in your apartment building or condo | 2 |

| | |
|---|----|
| In a community mailbox | 3 |
| In a rural mailbox at the side of the road | 4 |
| In a postal box at a post office or retail outlet | 5 |
| Don't know / No response | 99 |

Q2

How far from your home is your nearest post office?

<[PHONE]INTERVIEWER: READ LIST

| | |
|-------------------------------------|----|
| > | |
| 2.5 km or less | 1 |
| More than 2.5 km, but less than 5km | 2 |
| Between 5 and 15 km | 3 |
| More than 15 km | 4 |
| Don't know / No response | 99 |

Q3A

How often do you send the following things by mail? <[PHONE]Starting with (READ ITEM), do you send this daily, weekly, monthly, a few times a year, or never?>

| | |
|---|----|
| Personal correspondence such as letters and cards | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Daily | 5 |
| Don't know / No response | 99 |

Q3B

How often do you send the following things by mail? <[PHONE]Starting with (READ ITEM), do you send this daily, weekly, monthly, a few times a year, or never?>

| | |
|--------------------------|----|
| Bill payments | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Daily | 5 |
| Don't know / No response | 99 |

Q3C

How often do you send the following things by mail? <[PHONE]Starting with (READ ITEM), do you send this daily, weekly, monthly, a few times a year, or never?>

| | |
|--------------------------|----|
| Parcels | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Daily | 5 |
| Don't know / No response | 99 |

Q4A

How often have you done any of the following **at the post office** in the past year?

| | |
|------------------------------------|----|
| Sent a parcel to friends or family | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q4B

How often have you done any of the following **at the post office** in the past year?

| | |
|--------------------------|----|
| Picked up a parcel | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q4C

How often have you done any of the following **at the post office** in the past year?

| | |
|-----------------------------------|----|
| Returned an item purchased online | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q4D

How often have you done any of the following **at the post office** in the past year?

| | |
|--------------------------|----|
| Sent registered mail | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q4E

How often have you done any of the following **at the post office** in the past year?

| | |
|--------------------------|----|
| Bought stamps | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q4F

How often have you done any of the following **at the post office** in the past year?

| | |
|--|----|
| Accessed financial services such as MoneyGram or a Canada Post My Money loan | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q4G

How often have you done any of the following **at the post office** in the past year?

| | |
|--|----|
| Bought postage supplies such as envelopes, boxes or tape | |
| Never | 1 |
| A few times a year | 2 |
| Monthly | 3 |
| Weekly | 4 |
| Don't know / No response | 99 |

Q5A

How likely would you be to make use of these services if they were offered at your local post office?

| | |
|---|----|
| Become a client of Canada Post banking services | |
| Certainly | 1 |
| Probably | 2 |
| Probably not | 3 |
| Certainly not | 4 |
| Don't know / No response | 99 |

Q5B

How likely would you be to make use of these services if they were offered at your local post office?

| | |
|--|----|
| Use government services like those offered at Service Canada outlets | |
| Certainly | 1 |
| Probably | 2 |
| Probably not | 3 |
| Certainly not | 4 |
| Don't know / No response | 99 |

Q6

Has the COVID-19 pandemic changed how you use Canada Post's services in any way?

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| <[PHONE](DO NOT READ)> Don't know/no response | 9 |

Q7A

Please tell <[PHONE]me[ELSE]us> if you do each of the following a lot more, somewhat more, about the same, somewhat less, or a lot less, compared to before the pandemic ...

| | |
|--------------------------|----|
| Send letter mail | |
| A lot more | 1 |
| Somewhat More | 2 |
| About the same | 3 |
| Somewhat Less | 4 |
| A lot less | 5 |
| Don't know / No response | 99 |

Q7B

Please tell <[PHONE]me[ELSE]us> if you do each of the following a lot more, somewhat more, about the same, somewhat less, or a lot less, compared to before the pandemic ...

| | |
|--------------------------|----|
| Order parcels online | |
| A lot more | 1 |
| Somewhat More | 2 |
| About the same | 3 |
| Somewhat Less | 4 |
| A lot less | 5 |
| Don't know / No response | 99 |

Q7C

Please tell <[PHONE]me[ELSE]us> if you do each of the following a lot more, somewhat more, about the same, somewhat less, or a lot less, compared to before the pandemic ...

| | |
|------------------------------------|----|
| Send parcels to friends and family | |
| A lot more | 1 |
| Somewhat More | 2 |
| About the same | 3 |
| Somewhat Less | 4 |
| A lot less | 5 |
| Don't know / No response | 99 |

Q8

Given the increase in e-commerce deliveries, and parcel thefts ("porch pirates"), would you support conversion of your door-to-door mail and parcel delivery to secure and convenient community mailboxes that include <hover="A parcel locker is a postal box that allows for self-service collection of parcels. It is a secure, conveniently accessible, and contactless option for centralized parcel delivery.">parcel lockers>?

| | |
|----------------------------------|----|
| <[PHONE]Interviewer: read scale> | |
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q9A

To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services? <[PHONE]Are you very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied or very dissatisfied with (READ ITEM)?>

| | |
|---|----|
| Where you get your mail, such as at your home or a community mail box | |
| Very satisfied | 1 |
| Somewhat satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Somewhat dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know / No response | 99 |

Q9B

To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services? <[PHONE]Are you very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied or very dissatisfied with (READ ITEM)?>

| | |
|--|----|
| The <speed/frequency> of delivery of your mail | |
| Very satisfied | 1 |
| Somewhat satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Somewhat dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know / No response | 99 |

Q9C

To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services? <[PHONE]Are you very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied or very dissatisfied with (READ ITEM)?>

| | |
|--|----|
| The delivery of parcels (by Canada Post) | |
| Very satisfied | 1 |
| Somewhat satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Somewhat dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know / No response | 99 |

Q9D

To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services? <[PHONE]Are you very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied or very dissatisfied with (READ ITEM)?>

| | |
|---|----|
| Overall, how satisfied are you with the services offered by Canada Post | |
| Very satisfied | 1 |
| Somewhat satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Somewhat dissatisfied | 4 |
| Very dissatisfied | 5 |
| Don't know / No response | 99 |

Q10B

To what extent to you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

If letter mail took twice as long to reach me, I probably would not notice

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q10C

To what extent to you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

Door to door mail delivery is essential for the elderly and people with mobility or health problems

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q10D

To what extent to you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

It does not matter to me if a post office is in a pharmacy or a grocery store or if it is operated by Canada Post, if the prices and services are the same

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q10E

To what extent to you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

Canada Post continues to be an important and essential service for <Canadians/me>

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q11A

How much of a challenge do each of the following pose to you personally when accessing Canada Post services? <[PHONE]

Interviewer: For each one tell me if it poses no challenge at all, only a minor challenge, a moderate challenge a fairly significant challenge, or a very large challenge.>

The distance to your post office

| | |
|--------------------------------|----|
| No challenge at all | 1 |
| Only a minor challenge | 2 |
| A moderate challenge | 3 |
| A fairly significant challenge | 4 |
| A very large challenge | 5 |
| Don't know / No response | 99 |

Q11B

How much of a challenge do each of the following pose to you personally when accessing Canada Post services? <[PHONE]

Interviewer: For each one tell me if it poses no challenge at all, only a minor challenge, a moderate challenge a fairly significant challenge, or a very large challenge.>

The hours or operation of your post office

| | |
|--------------------------------|----|
| No challenge at all | 1 |
| Only a minor challenge | 2 |
| A moderate challenge | 3 |
| A fairly significant challenge | 4 |
| A very large challenge | 5 |
| Don't know / No response | 99 |

Q11C

How much of a challenge do each of the following pose to you personally when accessing Canada Post services? <[PHONE]

Interviewer: For each one tell me if it poses no challenge at all, only a minor challenge, a moderate challenge a fairly significant challenge, or a very large challenge.>

Delivery times for mail

| | |
|--------------------------------|----|
| No challenge at all | 1 |
| Only a minor challenge | 2 |
| A moderate challenge | 3 |
| A fairly significant challenge | 4 |
| A very large challenge | 5 |
| Don't know / No response | 99 |

Q11D

How much of a challenge do each of the following pose to you personally when accessing Canada Post services? <[PHONE]

Interviewer: For each one tell me if it poses no challenge at all, only a minor challenge, a moderate challenge a fairly significant challenge, or a very large challenge.>

Delivery times for parcels

| | |
|---------------------|---|
| No challenge at all | 1 |
|---------------------|---|

| | |
|--------------------------------|----|
| Only a minor challenge | 2 |
| A moderate challenge | 3 |
| A fairly significant challenge | 4 |
| A very large challenge | 5 |
| Don't know / No response | 99 |

Q11E

How much of a challenge do each of the following pose to you personally when accessing Canada Post services? <[PHONE]

Interviewer: For each one tell me if it poses no challenge at all, only a minor challenge, a moderate challenge a fairly significant challenge, or a very large challenge.>

Where your post office is located relative to grocery stores, pharmacies, or other services

| | |
|--------------------------------|----|
| No challenge at all | 1 |
| Only a minor challenge | 2 |
| A moderate challenge | 3 |
| A fairly significant challenge | 4 |
| A very large challenge | 5 |
| Don't know / No response | 99 |

Q11F

How much of a challenge do each of the following pose to you personally when accessing Canada Post services? <[PHONE]

Interviewer: For each one tell me if it poses no challenge at all, only a minor challenge, a moderate challenge a fairly significant challenge, or a very large challenge.>

The cost of shipping parcels from your community

| | |
|--------------------------------|----|
| No challenge at all | 1 |
| Only a minor challenge | 2 |
| A moderate challenge | 3 |
| A fairly significant challenge | 4 |
| A very large challenge | 5 |
| Don't know / No response | 99 |

Q12

To what extent do you agree or disagree with the following statement?

At a cost of \$1.07 per stamp for delivery anywhere in Canada or \$0.92 when you buy a booklet of 10, domestic stamps are under-priced for their value. <[PHONE]

Interviewer: Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree?

| | |
|--------------------------|----|
| >Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q13A

What is the **maximum** amount you feel is reasonable to pay for a single stamp to deliver a letter within the following areas? <[PHONE]

Interviewer: For each one would you be willing to pay (read price scale)>

Within your city or town

| | |
|--------------------------|----|
| \$1.00 | 1 |
| \$1.25 | 2 |
| \$1.50 | 3 |
| \$1.75 | 4 |
| \$2.00 | 5 |
| Don't know / No response | 99 |

Q13B

What is the **maximum** amount you feel is reasonable to pay for a single stamp to deliver a letter within the following areas? <[PHONE]

Interviewer: For each one would you be willing to pay (read price scale)>

Within your province

| | |
|--------------------------|----|
| \$1.00 | 1 |
| \$1.25 | 2 |
| \$1.50 | 3 |
| \$1.75 | 4 |
| \$2.00 | 5 |
| Don't know / No response | 99 |

Q13C

What is the **maximum** amount you feel is reasonable to pay for a single stamp to deliver a letter within the following areas? <[PHONE]

Interviewer: For each one would you be willing to pay (read price scale)>

Across the country

| | |
|--------------------------|----|
| \$1.00 | 1 |
| \$1.25 | 2 |
| \$1.50 | 3 |
| \$1.75 | 4 |
| \$2.00 | 5 |
| Don't know / No response | 99 |

PQ14

Canada Post has lost hundreds of millions of dollars over the past four years. This is due to the decline of mail and because services in rural and remote areas are unprofitable. Canada Post's mandate is to support itself financially and it does not receive any funding from the federal government. To address its losses, it needs some combination of government funding, increased revenue or decreased costs.

Q14A

To what extent do you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

Canada Post should provide only the level of service it can pay for with its own revenue

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q14B

To what extent do you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

Canada Post should receive federal government funding to maintain current service levels and prices across the country

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q15A

Of the following statements, which one most closely reflects your opinion?

| | |
|--|---|
| Canada Post should provide only the level of service it can pay for with its own revenue | 1 |
| Canada Post should receive federal government funding to maintain current service levels and prices across the country | 2 |
| Don't know / No response | 9 |

Q15B

Of the following statements, which one most closely reflects your opinion?

| | |
|--|---|
| Canada Post should provide only the level of service it can pay for with its own revenue | 1 |
| Canada Post should receive federal government funding to maintain current service levels and prices across the country | 2 |
| Don't know / No response | 9 |

Q16A

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

Reduce the number of post offices

| | |
|------------------|---|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |

| | |
|--------------------------|----|
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q16B

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

Replace corporate owned post offices with less expensive franchises located in grocery stores and pharmacies

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q16C

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

End door-to-door home delivery and replace it with community mailboxes, which cost half the price to service, for everyone except the elderly and those with mobility or health challenges

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q16D

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

Reduce the frequency of letter mail delivery from five days a week to every other day

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q16E

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

Increase the basic price of a stamp by roughly 25 cents

| | |
|------------------|---|
| Strongly support | 1 |
| Somewhat support | 2 |

| | |
|--------------------------|----|
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q16F

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

Install outdoor and automated 24/7 <Q8HOVER: [{\$_access==1}]parcel lockers (A parcel locker is a postal box that allows for self-service collection of parcels. It is a secure, conveniently accessible, and contactless option for centralized parcel delivery.)[{\$contexte{mobile}==1}]<abbr style="border-bottom: 1px dashed #ADADAD;cursor: help;" title="A parcel locker is a postal box that allows for self-service collection of parcels. It is a secure, conveniently accessible, and contactless option for centralized parcel delivery." rel="tooltip">parcel lockers</abbr>[ELSE]<hover="A parcel locker is a postal box that allows for self-service collection of parcels. It is a secure, conveniently accessible, and contactless option for centralized parcel delivery.">parcel lockers>

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q16G

<[PHONE]I am going to read some options for **reducing Canada Post's losses**. Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose these changes.[ELSE]Please read the following options for **reducing Canada Post's losses** and tell us if you support, or oppose these changes.>

The Government of Canada directly subsidizes more costly and unprofitable postal services in rural and remote communities

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q17A

Do you agree or disagree with the following statements relating to Canada Post Services?
<[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

All Canadians should shoulder the same cost (i.e., rate) for parcel delivery, regardless of the distance

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q17B

Do you agree or disagree with the following statements relating to Canada Post Services?
<[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

Canada Post should be allowed to deliver letters less frequently than five days a week to reduce costs

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q18

What is the furthest you are willing to travel to a post office?

<[PHONE]INTERVIEWER: READ LIST

>

| | |
|-------------------------------------|----|
| 2.5 km or less | 1 |
| More than 2.5 km, but less than 5km | 2 |
| Between 5km and 15 km | 3 |
| More than 15 km | 4 |
| Don't know / No response | 99 |

PQ19

Canada Post cannot close post offices in rural areas or convert them to less expensive franchises, due to a temporary freeze, also called a moratorium, that was introduced by the federal government in 1994. This prevents the closure or franchising of a list of 3,000+ post offices. Since then, many of these protected locations have become urbanized and their populations have grown significantly.

Q19A

Do you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

The **moratorium should continue**, but the list of locations protected from closure and franchising should be updated so it reflects areas that are truly rural

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q19B

Do you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

The **moratorium should be modified** to allow rural post offices to be replaced with franchises in grocery stores and pharmacies

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q19C

Do you agree or disagree with the following statements? <[PHONE]

Interviewer: For each one tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree>

The **moratorium should end** and Canada Post should be allowed to close underused post offices, even if they are in rural areas

| | |
|--------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Somewhat disagree | 3 |
| Strongly disagree | 4 |
| Don't know / No response | 99 |

Q20A

Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas? <[PHONE]

Interviewer: For each one tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose>

Providing access to financial services at post offices in rural and remote areas in light of a lack of bank branches

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q20B

Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas? <[PHONE]

Interviewer: For each one tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose>

Providing convenient access to other government services at rural and remote post offices

| | |
|------------------|---|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |

Q20C

Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas? <[PHONE]

Interviewer: For each one tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose>

Increasing the number of rural post office locations

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q20D

Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas? <[PHONE]

Interviewer: For each one tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose>

Extending hours of operation at rural post office locations

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q20E

Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas? <[PHONE]

Interviewer: For each one tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose>

Combining small rural post offices in the same geographic area into a single location that offers enhanced services such as automated 24/7 <hover="A parcel locker is a postal box that allows for self-service collection of parcels. It is a secure, conveniently accessible, and contactless option for centralized parcel delivery.">parcel lockers>

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

Q20F

Do you support or oppose Canada Post doing the following to better reach Canadians in rural and remote areas? <[PHONE]

Interviewer: For each one tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose>

Creating service hubs within rural communities that feature a post office as well as services from local organizations or businesses

| | |
|--------------------------|----|
| Strongly support | 1 |
| Somewhat support | 2 |
| Somewhat oppose | 3 |
| Strongly oppose | 4 |
| Don't know / No response | 99 |

QLANG [1,5]

What is the first language that you learned and still understand?

(Check all that apply)

| | |
|-------------------|----|
| English | 1 |
| French | 2 |
| Other (Specify) : | 77 |
| Do not know | 98 |
| No response | 99 |

QINC

Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes.

<[PHONE]INTERVIEWER: READ LIST

>

| | |
|---|---|
| Under \$20,000 | 1 |
| \$20,000 to just under \$40,000 | 2 |
| \$40,000 to just under \$60,000 | 3 |
| \$60,000 to just under \$80,000 | 4 |
| \$80,000 to just under \$100,000 | 5 |
| \$100,000 to just under \$150,000 | 6 |
| \$150,000 and above | 7 |
| <[PHONE](DO NOT READ)> Don't know / No response | 9 |

QBORN

Were you born in Canada?

| | |
|-------------------|---|
| Yes | 1 |
| No | 2 |
| Prefer not to say | 9 |

QMINOR [1,4]

Do you belong to any of the following groups?

<[PHONE]INTERVIEWER: READ LIST

> Select all that apply

| | |
|---|----|
| Indigenous people (i.e., First Nations, Métis, Inuit) | 1 |
| Member of a visible minority or racialized community | 2 |
| Person with a disability (i.e., long-term or recurring impairment such as vision, hearing, mobility, learning, developmental, memory or mental health-related that limits daily activities) | 3 |
| Member of the LGBTQ2+ community | 4 |
| None of the above | 98 |
| <[PHONE](DO NOT READ)> Prefer not to say | 99 |

THNK

That concludes the survey. Thank you very much for taking part. It is appreciated. Please press the "continue" button to submit your answers.

THNK2

Screened out

Thank you very much for your interest in completing this survey. Unfortunately you are not eligible for this survey.