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# ***Indigenous Peoples' Views on Canada Post Services***

## **Final Report**

**Prepared for Public Services and Procurement Canada**

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## **Indigenous Peoples' Views on Canada Post Services - Final report**

Prepared for Public Services and Procurement Canada by Environics Research

June 2022

This public opinion research report presents the results of a quantitative research study conducted by Environics Research on behalf of Public Services and Procurement Canada, comprising a telephone survey with 425 Indigenous Peoples across Canada aged 18 living both on- and off- reserve, conducted from April 12 – May 8, 2022.

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## Executive 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.

COVID-19 has dramatically changed how Canadians use postal services. Given this shift, research was needed to help the Government of Canada better understand Indigenous peoples' views regarding 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. In 2018, the government affirmed that Canada Post is expected to continue to meet the expectations laid out in the Charter.

Public opinion research was designed to measure the current views of Indigenous peoples 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, to ensure the evolution of this important public institution reflects their understanding of "quality service that Canadians can afford."

### B. Methodology

EnviroNics conducted a telephone survey with a random sample of 425 Indigenous people from April 12 and May 8, 2022. The sample was stratified to include 50% interviews on-reserve and 50% off-reserve. This stratification is important because Canada Post mail delivery varies on First Nations reserves: mail is delivered to a central location (e.g., Band Office or community centre), but Canada Post is not responsible for mail delivery to individual households on-reserve.

The data were weighted at the analysis stage to ensure the final sample is representative of the current Indigenous population by province, location (urban, rural, on-reserve), and Indigenous identity. The margin of error for the total sample is plus or minus 4.9 percentage points, at the 95% confidence level.

### C. Key findings

The survey reveals the great diversity in how Indigenous people receive their mail: postal boxes at post offices are much more prominent (skewing to rural areas and reserves) than door-to-door delivery (skewing to urban areas). Of Canada Post's services, there is clearly an important role played by parcel delivery/pick-up, particularly for Indigenous people living outside of cities. These two issues clearly factor into how Indigenous people evaluate current services and react to potential alternatives.

Overall, Canada Post is viewed as an essential service and there is good satisfaction with its services, although satisfaction is lower among those who do not receive door-to-door delivery. In this context, the stated preference (regardless of how mail is received) is for the status quo (maintaining services) over reduced services, even if it requires the introduction of federal government funding. Moreover, rural and reserve residents favour extended services, such as the ability to access other government services, financial services or other

businesses, where they get their mail. In addition, a significant majority agreed that all Canadians should shoulder the same parcel cost regardless of distance (72%).

In terms of specific measures to address Canada Post's revenue shortfall, support is highest for ending door-to-door delivery (especially among the majority of Indigenous people who do not have this service) and lowest for reducing the number of post offices (reflecting current reliance on post offices for parcel pick-up). The results suggest some flexibility around franchising, alternate day delivery and postage rates, but likely requires the case for increased prices to be clearly made, since there is limited belief that current postal services are underpriced for their value.

### ***Experience with Canada Post services***

- The 2016 Census revealed that over half (55%) of Indigenous people in Canada live in urban areas, with just under half in rural areas (25%) or on First Nations reserves (20%). The way Indigenous people receive their mail is related to their location of residence. Overall, Indigenous people are most likely to receive mail by postal box at a post office or retail outlet (46%); this segment is more likely than average to live in a rural area or on a First Nations reserve. The small proportion who receive mail to their door (14%) skews to mainly urban or suburban areas.
- Reported use of Canada Post's services emphasizes the role of parcel delivery for Indigenous communities. When it comes to sending mail, personal correspondence (22% send monthly) exceeds bill payments (17%) and parcels (14%). Yet all three are surpassed by the one-third of Indigenous people who pick up parcels at the post office at least monthly. Parcel pickup is particularly widespread outside of cities (41% vs. 17% in cities), which reflects greater propensity for door-to-door parcel delivery in cities, but also the importance of parcel delivery in accessing goods not available on reserves, in rural areas, and smaller population centres. Such reliance on parcels likely also contributes to the finding that parcel shipping costs are a significant challenge for close to one in five (18%) rural and reserve residents.
- Further evidence for growing emphasis on parcel delivery is that, among Indigenous people who say COVID-19 changed the way they use Canada Post services (34%), the most widely reported change is an increase in online parcel ordering.

### ***Satisfaction with and perceived value of Canada Post***

- Indigenous people place considerable value on Canada Post, with more than seven in ten strongly agreeing it is an essential service for Canadians in general (77%) as well as for them personally (73%).
- Indigenous people also express an overall high level of satisfaction with Canada Post services (88% satisfied, including 54% very satisfied). They are most satisfied with where they get their mail (86%; 57% very satisfied) and slightly less satisfied with parcel delivery (80%; 43% very satisfied). Location matters, as satisfaction with both aspects is higher among Indigenous people who receive door-to-door delivery, and lower among those who get their mail by postal box or centralized mailbox.
- Despite the perceived importance of and satisfaction with Canada Post, there is limited perception that domestic postage costs less than its worth for the service provided. Indigenous people are more likely to agree (57%) than disagree (43%) that domestic stamps are underpriced for their value, but few (14%) strongly agree.

### ***Addressing Canada Post's revenue shortfall***

- There is widespread preference to address Canada Post's revenue shortfall<sup>1</sup> through federal government funding to maintain current service levels and prices (82%) rather than reducing services to fit Canada Post's budget (13%) – even though the latter reflects the organization's current mandate. This preference is remarkably consistent across the population.
- In terms of specific measures to reduce Canada Post's losses, ending door-to-door delivery and moving to community mailboxes ranks at the top of the list. Seven in ten support (71% overall, 50% strongly) this measure. And while strong support ranges from 66 percent in rural areas to 39 percent in cities (and 34% among those who currently receive home delivery), no other option garners substantially greater support among city-dwellers. For instance, support for ending daily mail delivery (i.e., switching the frequency of delivery to fewer than five days a week) ranks the same or slightly lower in support (65% overall, 38% strongly), across all areas of residence.
- There is majority opposition to addressing Canada Post's losses by reducing the number of post offices (64% oppose vs. 30% support), which likely reflects the extensive use of parcel pick up described earlier. The results suggest openness to alternate service delivery models such as replacing corporate-owned post offices with franchises in grocery stores and pharmacies (64% support, 30% strongly) and automated parcel lockers (57% support, 32% strongly) – the latter receiving particularly strong support from rural residents.
- Indigenous people are open to pricing changes to address Canada Post's losses. There is majority support for increasing basic stamp prices by 25-cents (65% support, 31% strongly). There is also indication of willingness to consider paying differing letter mail rates by distance: majorities say it is reasonable to pay \$1.25 to send a letter within their province (54%) and \$1.50 across the country (64%), compared to one-quarter willing to pay beyond \$1.00 to send mail within their city/town.
- In contrast, respondents were asked about moving to a standardized cost for parcel delivery: a majority of Indigenous people agree all Canadians should shoulder the same parcel cost regardless of distance (72% agree, 44% strongly). Notably, this option is more appealing to those outside of cities (48% strongly agree, vs. 37% of city-dwellers), likely reflecting the challenge parcel cost presents for rural and reserve residents (described in an earlier paragraph). The difference may also reflect concerns among urban residents about subsidizing parcel costs for non-urban residents.

### ***Services in rural areas***

- Indigenous people are generally in favour of efforts to maintain postal services to rural communities, regardless of where they themselves live. There is majority support for the federal government to subsidize more costly and unprofitable postal services in rural and remote communities (73% support,

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<sup>1</sup> The following explanation was provided to survey respondents: "Canada Post has lost hundreds of millions of dollars over the past four years. This is due to the decline of mail revenues 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. However, to address its losses, it needs some combination of government funding, increased revenue or decreased costs."

43% strongly). Majorities also agree with maintaining the rural moratorium with certain adjustments, either with updated definition of rural (84%) or a modified moratorium where rural post offices are replaced with franchises (62%); over half disagree with ending the moratorium outright.

- There is broad interest among rural and reserve residents for expanded services in rural areas. Support is highest for offering other government services at post offices (85%) and creating shared-service hubs (80%), followed by providing access to financial services at post offices (71%).
- In terms of actual use of additional services, small segments of Indigenous people indicate they would certainly use government services like those offered at Service Canada outlet (17%) or become a client of Canada Post banking services (5%), although this latter is of greater interest on-reserve (10%). While these overall numbers are limited, they are nonetheless important to consider given the demonstrated challenges Indigenous people have trying to access government and financial services.

#### **D. Cost of research**

The contract value was \$113,005.06 (including HST)

#### **E. Political neutrality statement and contact information**

I hereby certify as senior officer of Environics 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.

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## Introduction

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.

COVID-19 has dramatically changed how Canadians use postal services. Given this shift, this research will help the Government of Canada to better understand Indigenous peoples' views regarding 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.

Areas of inquiry included, but are not limited to:

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

It should be noted that CPC delivers mail to a central location on First Nations reserves (e.g., Band Office or community centre), but is not responsible for mail delivery to individual households on-reserve.

### **Report**

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the survey data. Provided under a separate cover is a detailed set of "banner tables" presenting the results for all questions by population segments as defined by region and demographics. These tables are referenced by the survey question in the detailed analysis.

In this report, quantitative results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the tables due to rounding. Responses are based on total sample unless otherwise specified.



## Detailed findings

### I. Current service and use of postal services

#### A. Method of delivery

*The most common way Indigenous people receive their mail is at a postal box at a post office or retail outlet. However, this varies by where people live, with rural mailboxes and postal boxes more likely in rural areas, and door-to-door delivery more common in urban centres.*

It is most common for Indigenous people to receive their mail to a postal box (46%). Of the remainder, roughly equal proportions receive mail to a community mailbox (21%), rural mailbox (15%) or at their door (14%). Very few receive mail at a centralized box in an apartment or condo (4%).

The table below presents a brief profile of mail recipients according to how they receive their mail. It shows the main factor in how someone receives their mail is where they live. Indigenous people receiving mail to their door typically live in a city or a suburb; those who receive mail at a rural mailbox or postal box are more likely than average to live in rural areas. In contrast, there is little variation in the Indigenous identity, age or gender profiles by mail delivery method. The one exception is that Indigenous people who receive mail to their door tend to skew older (60+) than average.

**Delivery Method – Demographic Profile**

<i>Q8. How do you receive regular mail at home? Is it...?</i>	Total (n=425)	In a postal box at a post office or retail outlet (n=209)	In a community mailbox/in a centralized box in apt. or condo (n=105)	In a rural mailbox at the side of the road (n=66)	To your door (n=44)
<b>Location</b>					
In a city	33%	19%	37%	27%	<b>78%</b>
In a suburb	20%	21%	25%	11%	19%
In a rural area	24%	<b>31%</b>	12%	<b>49%</b>	<1%
On a First Nations reserve	22%	29%	27%	14%	3%
<b>Identity</b>					
First Nations	60%	58%	58%	61%	68%
Inuk	4%	9%	<1%	-	-
Métis	36%	33%	42%	39%	32%
<b>Gender</b>					
Male	49%	40%	56%	57%	58%
Female	50%	60%	44%	43%	39%
<b>Age</b>					
18-34	36%	38%	42%	46%	14%
35-59	46%	50%	42%	37%	48%
60+	18%	12%	16%	17%	39%

Base: All respondents

**B. Frequency of sending mail**

*There are small segments of about one in five or fewer who regularly send items through the mail.*

One-in-five Indigenous people (22%) regularly send personal correspondence and 14 percent send parcels by mail (at least monthly); however, it is most common to send them a few times a year (52% and 51%, respectively). There is also 17 percent who send bill payments by mail at least monthly, although seven in ten (70%) never do so.

**Frequency of sending mail**

<b>Q10-12. How often do you send the following things by mail?</b>	<b>NET monthly</b>	<b>Daily</b>	<b>Weekly</b>	<b>Monthly</b>	<b>A few times a year</b>	<b>Never</b>
Personal correspondence such as letters and cards	<b>22%</b>	<1%	4%	17%	52%	25%
Bill payments	<b>17%</b>	<1%	4%	13%	12%	70%
Parcels	<b>14%</b>	1%	2%	11%	51%	35%

*Base: All respondents*

These patterns are consistent across the population, with a few exceptions:

- Regular (at least monthly) mailing of parcels is more common among those with higher household incomes (22% among \$60K+).
- Regular mailing of personal correspondence is higher in cities (28%) and suburbs (33%) than in rural areas (16%) or on-reserve (9%), and among individuals with a physical mobility limitation (31%).

Notably, there are no meaningful age differences in the proportions sending each of these types of mail.

### C. Use of post office services in the past year

*Past year use of post office services varies by type of service, but is highest for parcel pick-up, particularly for Indigenous people living outside of cities.*

The most widely used service at a post office in the past year is parcel pick-up, which one third (33%) did at least monthly. Other services are typically used a few times a year, such as buying stamps (64%) or sending a parcel to friends/family (58%). Most did not access financial services (87%) or return online purchases (69%) at the post office.

#### Use of post office services in past year

<b>Q13-18. In the past year, have you done each of the following at the post office weekly, monthly, a few times a year, or never?</b>	<b>NET monthly</b>	<b>Weekly</b>	<b>Monthly</b>	<b>A few times a year</b>	<b>Never</b>
Picked up a parcel	<b>33%</b>	8%	25%	42%	25%
Bought stamps	<b>11%</b>	1%	9%	64%	25%
Sent a parcel to friends or family	<b>5%</b>	0%	4%	58%	38%
Returned an item that you purchase online	<b>3%</b>	1%	2%	27%	69%
Accessed financial services such as MoneyGram or Canada Post My Money loan	<b>3%</b>	0%	3%	9%	87%

Base: All respondents

Regular parcel pick-up (at least monthly) at the post office is more common outside of cities (41%, vs. 17% in cities), and among younger Indigenous people (73% under the age of 60) and those with higher household incomes (54% of \$60,000 or more).

### D. Change in use of Canada Post services due to COVID-19

*One-third of Indigenous people say they changed their use of Canada Post services due to COVID-19, the key change being a reported increase in ordering parcels online.*

One in three (34%) Indigenous people reported a change in their use of Canada Post's services due to the pandemic. This proportion is higher among those living on-reserve (45%) and in rural areas (40%), and thus, among First Nations (39%) compared to Métis (20%). In turn, reported change in use of Canada Post services is less common among older Indigenous people (21% aged 60 and over).

#### Change in use due to COVID-19 – by location

<b>Q22. Has the COVID-19 pandemic changed how you use Canada Post's services in any way?</b>	<b>Total (n=425)</b>	<b>On-Reserve (n=214)</b>	<b>In a city (n=92)</b>	<b>In a suburb (n=52)</b>	<b>In a rural area (n=67)</b>	<b>NET Off-Reserve (n=211)</b>
Yes	34%	45%	24%	30%	40%	30%
No	66%	55%	75%	70%	60%	66%

Base: All respondents

**Reported change in use.** Among those whose changed their use of Canada Post services due to COVID-19, the most widely reported change is an increase in ordering parcels online (52% a lot or somewhat more compared to before the pandemic).

#### Increased use due to COVID-19

<b>Q23. Please tell me 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. (n=131)</b>	<b>A lot more</b>	<b>Somewhat more</b>	<b>About the same</b>	<b>Somewhat less</b>	<b>A lot less</b>
Order parcels online	28%	24%	20%	2%	15%
Send parcels to family and friends	6%	14%	48%	11%	19%
Send letter mail	5%	11%	54%	6%	22%

Base: Those whose service usage changed due to COVID-19

#### E. Interest in future services

*There is some limited interest in using other government services at their local post office; very few are certain to access Canada Post banking services.*

Respondents were asked about their likelihood to use new post office services; the analysis focuses on those who are “certain” to use such services, which more accurately reflects true interest (“probably use” is often given as a socially desirable response).

A small segment of Indigenous people (17%) indicated they would certainly use government services like those offered at Service Canada outlets. Only five percent would be certain to become a client of Canada Post banking services, which is slightly higher among those living on-reserve (10%). While these overall numbers are limited, they are nonetheless important to consider given the demonstrated challenges Indigenous people have trying to access government and financial services.

#### Likelihood of using new post office services

<b>Q20-21. How likely would you be to make use of the following services if they were offered at your local post office?</b>	<b>Certainly</b>	<b>Probably</b>	<b>Probably not</b>	<b>Certainly not</b>
Use government services like those offered at Service Canada outlets	17%	45%	26%	10%
Become a client of Canada Post banking services	5%	20%	47%	25%

Base: All respondents

There are no other meaningful differences by population segment.

## F. Distance to nearest post office

Overall, more than half of Indigenous people live within 2.5km of a post office, although this is the case for four in ten living on reserve.

Most (84%) Indigenous people live within 15 km of the nearest postal outlet, seven-in-ten (71%) live within 5 km, and just over half (54%) live within 2.5 km.

Proximity to the nearest post office varies by location. Those living in a city (59%) or suburb (65%) are more likely than those living on a reserve (42%) or in a rural area (50%) to live within 2.5 km of a post office. Moreover, one-in-five (21%) on-reserve residents live more than 15 km from their nearest post office.

### Distance to nearest post office – by location

Q9. How far from home is your nearest post office?	Total (n=425)	On-Reserve (n=214)	In a city (n=92)	In a suburb (n=52)	In a rural area (n=67)	NET Off-Reserve (n=211)
2.5 km or less	54%	42%	59%	65%	50%	58%
More than 2.5 km but less than 5 km	17%	16%	26%	11%	10%	17%
Between 5 and 15 km	13%	17%	4%	9%	23%	11%
More than 15 km	12%	21%	5%	8%	15%	9%

Base: All respondents

## G. Distance willing to travel to post office

Overall, Indigenous people are willing to travel up to 2.5 km to their nearest post office, and over half are willing to travel up to 5 km.

Respondents were asked the farthest they are willing to travel to a post office. As we would expect, willingness to travel declines as the distance increases. While almost all Indigenous people (98%) are fine to travel to a post office within 2.5km, and a majority (57%) would travel up to 5km, this drops to one in ten (12%) willing to travel more than 15km.

The distance Indigenous people are willing to travel to their nearest post office varies by location, with those living in a city (48%) or suburb (54%) less willing to travel further than 2.5 km. Individuals living on reserve and in a rural area are markedly more willing to travel further distances, as 19% each stated they would travel more than 15 km.

### Distance willing to travel to post office – by location

Q60. What is the farthest you are willing to travel to a post office?	Total (n=425)	On-Reserve (n=214)	In a city (n=92)	In a suburb (n=52)	In a rural area (n=67)	NET Off-Reserve (n=211)
2.5 km or less	98%	99%	98%	97%	98%	98%
More than 2.5 km but less than 5 km	57%	62%	48%	54%	66%	55%
Between 5 and 15 km	30%	39%	18%	27%	42%	28%
More than 15 km	12%	19%	6%	4%	19%	9%

Base: All respondents

## Distance willing to travel to post office – by current distance to post office

<b>Q60. What is the farthest you are willing to travel to a post office?</b>	<b>Total (n=425)</b>	<b>2.5 km or less (n=231)</b>	<b>More than 2.5 km, but less than 5km (n=72)</b>	<b>Between 5 and 15 km (n=54)</b>	<b>More than 15 km (n=50)</b>
2.5 km or less	98%	99%	100%	94%	100%
More than 2.5 km, but less than 5km	57%	40%	75%	83%	90%
Between 5 and 15 km	30%	12%	21%	76%	86%
More than 15 km	12%	5%	1%	11%	61%

Base: All respondents

Note about calculation: Percentages are cumulative so that if a respondent indicated they travel more than 15 km, it is assumed they would also be willing to travel the shorter distances.

Again, as expected, willingness to travel further to the nearest post office is higher among those who already live more than 5 km from the post office. Those living closer than 5 km are not willing to increase their distance travelled.

## II. Satisfaction with and perceptions of Canada Post services

### A. Overall satisfaction

*There is widespread satisfaction with Canada Post services, with more than half of Indigenous people who are very satisfied.*

Overall satisfaction with Canada Post is strong among Indigenous people. More than half are very satisfied (54%) and another third (34%) are somewhat satisfied. Only 4% are dissatisfied. Satisfaction levels are similar across population subgroups, including by location (on- and off-reserve).

#### Overall satisfaction – by location

<b>Q31. Overall, how satisfied are you with the services offered by Canada Post?</b>	<b>Total (n=425)</b>	<b>On-Reserve (n=214)</b>	<b>Off-Reserve (n=211)</b>
Very satisfied	54%	55%	53%
Somewhat satisfied	34%	36%	34%
Neither satisfied nor dissatisfied	7%	5%	7%
Somewhat or very dissatisfied	4%	2%	5%

Base: All respondents

### B. Satisfaction with aspects of service

*In terms of specific aspects of their Canada Post service, there is greater satisfaction with the location of where they receive mail than with parcel delivery, although very few express real dissatisfaction with either.*

Majorities of eight in ten or higher are satisfied with where they get their mail and the delivery of parcels, but strong satisfaction (i.e., very satisfied) is higher for mail receipt (57%) than parcel delivery (43%). It cannot be determined why this is the case using the data collected.

#### Satisfaction with aspects of service

<b>Q27,30. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services?</b>	<b>NET satisfied</b>	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Neither satisfied nor dissatisfied</b>	<b>NET dissatisfied</b>
Where you get your mail, such as at your home or a community mailbox	<b>86%</b>	57%	29%	4%	<b>8%</b>
The delivery of parcels by Canada Post	<b>80%</b>	43%	37%	6%	<b>8%</b>

Base: All respondents

Strong satisfaction with where their mail is delivered is higher among those who receive mail to their door (73%), followed by a rural mailbox (65%), and is lower among those who receive mail to a postal box (54%) or centralized mailbox (49%).

Strong satisfaction with parcel delivery is also higher among those who receive mail to their door (57%) rather than a centralized mailbox (32%).

### C. Perceived importance of Canada Post services

*There is widespread agreement that Canada Post is an essential service. Views are divided about whether they would notice or not if mail delivery took longer, but those living in rural areas are more likely to believe they would notice, while those living on-reserve are least likely to notice.*

Respondents were asked a series of five questions about the perceived value of Canada Post, both for them personally and for other Canadians.

Majorities of more than seven in ten strongly agree that Canada Post is an essential service for them personally (73%) and for Canadians in general (77%), and that door-to-door service is essential for the elderly and those with mobility challenges (76%). Slightly fewer, but still a majority (58%), strongly agree they are flexible about the Canada Post location if prices and services are the same.

In contrast, opinions are divided about whether they would notice if mail delivery took twice as long: half (51%) would notice, while just under half (45%) would not.

#### Perceived importance of services

<b>Q33-37. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements</b>	<b>NET agree</b>	<b>Strongly agree</b>	<b>Somewhat agree</b>	<b>Somewhat disagree</b>	<b>Strongly disagree</b>	<b>NET disagree</b>
Canada Post continues to be an important and essential service to Canadians	<b>97%</b>	77%	19%	1%	1%	<b>2%</b>
Canada Post continues to be an important and essential service for me	<b>97%</b>	73%	24%	1%	1%	<b>2%</b>
Door to door mail delivery is essential for the elderly and people with mobility or health problems	<b>92%</b>	76%	16%	2%	1%	<b>3%</b>
It doesn't 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	<b>83%</b>	58%	25%	9%	7%	<b>16%</b>
If letter mail took twice as long to reach me, I probably would not notice	<b>51%</b>	20%	31%	19%	26%	<b>45%</b>

Base: All respondents

These perceptions are largely similar across population segments, with a few exceptions. Strong agreement that door-to-door delivery is essential for the elderly and people with mobility problems is higher among those who currently have door-to-door delivery (88%) or receive their mail to a centralized mailbox (85%), and thus also skews to those who live in a city (87%); it does not vary by age or disability status.

Views about whether or not they would notice if letter mail took longer to arrive are evenly divided among most population segments. The one exception is that those living in rural areas are most likely to believe they would notice such a delay and those living on-reserve believe they would *not* notice.



### D. Challenges in rural and remote areas

*Parcel shipping costs are a significant challenge for close to one in five rural and reserve residents. There is also a small segment of fewer than one in ten who find distance to their post office, hours of operation and parcel delivery times to be particularly challenging.*

Rural and reserve respondents were presented with four potential challenges related to mail services and asked the extent to which each is a challenge for them personally. Relatively few consider any of these to be a significant personal challenge, though parcel cost is more of a challenge compared to other potential issues. Nearly one in five find the cost of shipping parcels from their community to be at least a fairly significant challenge (18%), whereas fewer than one-in-ten say the same about the distance to the post office (8%), hours of operation (9%), and delivery times for parcels (8%).

#### Challenges in rural and remote areas

<b>Q38,39,41,43. How much of a challenge do each of the following pose to you personally? (n=290)</b>	<b>NET significant challenge</b>	<b>A very significant challenge</b>	<b>A fairly significant challenge</b>	<b>A moderate challenge</b>	<b>Only a minor challenge</b>	<b>No challenge at all</b>
The cost of shipping parcels from your community	<b>18%</b>	14%	3%	16%	27%	32%
The hours of operation of your post office	<b>9%</b>	6%	3%	13%	56%	75%
The distance to your post office	<b>7%</b>	5%	2%	8%	23%	62%
Delivery times for parcels	<b>7%</b>	6%	1%	15%	22%	49%

*Base: Rural and on-reserve respondents*

Respondents who are more likely to find the following factors significantly challenging (very or fairly) include:

#### *Distance to post office*

- Older residents (25% aged 60+)
- Those living more than 2.5km from nearest post office (13%, vs. 2% who live within 2.5km)

#### *Cost of shipping parcels*

- Younger residents (23% aged 18-34)
- Women (29%, vs. 9% of men)
- Those with a physical mobility limitation (33%)

### E. Value for money

*Indigenous people are more likely to agree than disagree that domestic stamps are underpriced for their value, but few strongly agree, suggesting limited openness to higher postage rates.*

Currently the price per stamp is \$1.07 anywhere in Canada or 92-cents within a booklet of ten. Respondents were asked the extent to which they believe domestic stamps are underpriced for their value, potentially indicating openness to paying more for postage that reflects the true value of the service. Indigenous people are more likely to agree (57%) than disagree (36%) that domestic stamps are underpriced for their value, but very few strongly agree (14%).

#### Value of domestic stamps

<b>Q44. At a cost of \$1.07 per stamp for delivery anywhere in Canada and 92-cents when you buy a booklet of ten, domestic stamps are under-priced for their value</b>	<b>Total (n=425)</b>
Strongly agree	14%
Somewhat agree	43%
Somewhat disagree	21%
Strongly disagree	14%

Base: All respondents

Strong agreement that stamps are underpriced for their value (potentially meaning openness to paying more) is higher among those with lower household incomes (19% under \$60K) and those who are very satisfied with Canada Post's services (22%), but otherwise does not vary significantly across the population.

### F. Maximum reasonable price for stamps

*Indigenous people differentiate the maximum amount that is reasonable to pay per stamp based on delivery distance: majorities are willing to pay \$1.25 within their province and \$1.50 across the country, but only one-quarter are willing to pay beyond \$1.00 within their city/town.*

Price per stamp is currently the same regardless of distance within Canada. When asked about their openness to pricing based on distance, Indigenous people indicated they would consider paying different rates based on distance. This is most evident for sending mail across the country: most (96%) Indigenous people are willing to pay \$1.00 per stamp to send mail across Canada, and majorities are also willing to pay \$1.25 (79%) or even \$1.50 (64%). When sending mail within their province, a majority (54%) would be willing to pay \$1.25. However, there is limited willingness to pay beyond \$1.00 for a single stamp within their city or town (for example, only one-quarter are willing to pay \$1.25 for this).

#### Maximum reasonable price

<b>Q45-47. What is the maximum amount you feel is reasonable to pay for a single stamp to deliver a letter...?</b>	<b>\$1.00</b>	<b>\$1.25</b>	<b>\$1.50</b>	<b>\$1.75</b>	<b>\$2.00</b>
Within your city or town	96%	27%	12%	5%	3%
Within your province	95%	54%	30%	9%	6%
Across the country	96%	79%	64%	40%	29%

Base: All respondents

## Maximum reasonable price – by location

<b>Q45-47. What is the maximum amount you feel is reasonable to pay for a single stamp to deliver a letter...?</b>	<b>Total (n=425)</b>	<b>On-Reserve (n=214)</b>	<b>Off-Reserve (n=211)</b>
<i>Within your city or town</i>			
\$1.00	96%	98%	95%
\$1.25	27%	40%	23%
\$1.50	12%	21%	9%
\$1.75	5%	7%	4%
\$2.00	3%	5%	3%
<i>Within your province</i>			
\$1.00	95%	96%	96%
\$1.25	54%	66%	52%
\$1.50	30%	47%	47%
\$1.75	9%	31%	44%
\$2.00	6%	10%	6%
<i>Across the country</i>			
\$1.00	96%	95%	95%
\$1.25	79%	88%	76%
\$1.50	64%	82%	58%
\$1.75	40%	55%	35%
\$2.00	29%	44%	24%

Base: All respondents

Note about calculation: Percentages are cumulative so that if a respondent indicated they would pay \$2.00, it is assumed they would also be willing to pay the lower amounts.

There are larger proportions of Indigenous people on-reserve (versus off-reserve) who consider higher prices reasonable to pay across all three jurisdictions (i.e., in their own city/town, across the province, and across the country). This may reflect the prevalence of higher consumer prices where they live (or even potentially greater social desirability bias affecting their responses), and should not be interpreted as a greater ability to afford higher prices.

### III. Canada Post potential service changes

#### A. Support for measures

*There is a strong preference for Canada Post to receive federal government funding to maintain current service levels and prices, rather than limit services to what it can provide with its own revenue.*

Respondents were read the following explanation of Canada Post's current situation: *Canada Post has lost hundreds of millions of dollars over the past four years. This is due to the decline of mail revenues 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. However, to address its losses, it needs some combination of government funding, increased revenue or decreased costs.*

They were then asked which of two possible approaches they prefer for addressing the current revenue shortfall. By a large margin, Indigenous people believe that Canada Post should receive federal funding to maintain current service levels and prices across the country (82%), rather than provide only the level of service it can pay for with its own revenue (13%). This preference is remarkably consistent across the population; there is no subgroup that stands out as particularly in favour of Canada Post relying solely on its own revenue.

#### Support for different measures – by location

<b>Q50. Of the two statements, which one most closely reflects your opinion?</b>	<b>Total (n=425)</b>	<b>On-Reserve (n=214)</b>	<b>Off-Reserve (n=211)</b>
Canada Post should receive federal government funding to maintain current service levels and prices across the country	82%	85%	82%
Canada Post should provide only the level of service it can pay for with its own revenue	13%	11%	13%

Base: All respondents

#### B. Support for measures to reduce Canada Post's losses

*Indigenous people support most options for reducing Canada Post's losses, but only one-third support reducing the number of post offices.*

Respondents were given several options for reducing Canada Post's losses and asked their level of support for each. There is majority support for most options for reducing Canada Post's losses, with the exception of reducing the number of post offices, which is supported by only three in ten (30%).

There is strongest support for the federal government subsidizing postal services in rural and remote communities (73%), followed by ending door-to-door service and installing community mailboxes (71%). Two thirds support increasing the basic price of stamps by 25-cents (65%), reducing mail delivery to every other day (65%), and replacing post offices with retail outlets in pharmacies and grocery stores (64%). Well over half (57%) support installing outdoor and automated parcel lockers.

There is strongest opposition to the reduction of the number of post offices (64%), while other measures received opposition from between one fifth and just over one third of Indigenous people.

## Support for measures to reduce Canada Post's losses

<b>Q51-57. 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?</b>	<b>NET support</b>	<b>Strongly support</b>	<b>Somewhat support</b>	<b>Somewhat oppose</b>	<b>Strongly oppose</b>	<b>NET oppose</b>
The Government of Canada directly subsidizes more costly and unprofitable postal services in rural and remote communities	<b>73%</b>	43%	30%	10%	9%	<b>19%</b>
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 other health challenges	<b>71%</b>	50%	21%	8%	15%	<b>23%</b>
Increase the basic price of a stamp by roughly 25 cents	<b>65%</b>	31%	33%	15%	19%	<b>34%</b>
Reduce the frequency of letter mail delivery from five days a week to every other day	<b>65%</b>	38%	27%	11%	22%	<b>33%</b>
Replace corporate owned post offices with less expensive franchises in grocery stores and pharmacies	<b>64%</b>	30%	35%	11%	19%	<b>30%</b>
Install outdoor and automated parcel lockers that are available 24 hours a day, seven days a week	<b>57%</b>	32%	25%	15%	23%	<b>37%</b>
Reduce the number of post offices	<b>30%</b>	12%	19%	22%	42%	<b>64%</b>

Base: All respondents

Support for some measures is stronger depending on where people live. In particular, strong support for ending door-to-door home delivery is highest in rural areas (66%) and lowest in cities (39%) and among those who currently have their mail delivered to their door (34%). Strong support for parcel lockers is also higher in rural areas (45%) than in cities or suburbs (24%). Those living on-reserve are more in favour of increasing the basic price of a stamp by roughly 25 cents (45% strongly support).

Other demographic differences in strong support for certain measures include:

- Strong support for ending door-to-door home delivery is higher among Métis (64%) and women (60%).

- Strong support for installing parcel lockers is higher among those under the age of 60 (70%) than those aged 60+ (19%).
- Strong support for replacing corporate owned post offices with less expensive franchises in grocery stores and pharmacies (36%) and for reducing the number of post offices (16%) are both higher among those with lower household incomes (under \$60K).

### C. Agreement with statements about Canadian Postal Service Charter

*Most agree there should be standardized cost for parcel delivery, and support reducing the frequency of letter delivery to cut costs.*

The Canadian Postal Service Charter currently states that *Canada Post will deliver letters, parcels and publications five days a week (except for statutory holidays) to every Canadian address, except in remote areas where less frequent service may be necessary due to limited access to the community.*

Although this information was not provided to respondents, a survey question was asked to gauge their openness to reducing the frequency of letter delivery. Close to two-thirds (65%) agree with reducing letter delivery from five days a week (33% strongly and 32% somewhat). There are, however, one in five (19%) who strongly *disagree* with reducing the frequency of delivery. Individuals living off-reserve are more likely to strongly agree with reducing delivery frequency (36% compared to 21% of those living on-reserve).

Seven in ten (72%) Indigenous people agree there should be a standardized cost for parcel delivery shouldered by all Canadians regardless of distance (44% strongly and 28% somewhat).

#### Agreement with statements about Canadian Postal Service Charter

<b>Q58,59. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements relating to Canada Post services? (n=425)</b>	<b>NET agree</b>	<b>Strongly agree</b>	<b>Somewhat agree</b>	<b>Somewhat disagree</b>	<b>Strongly disagree</b>	<b>NET disagree</b>
All Canadians should shoulder the same cost for parcel delivery, regardless of the distance	72%	44%	28%	15%	9%	25%
Canada Post should be allowed to deliver letters less frequently than five days a week to reduce costs	65%	33%	32%	13%	19%	32%

Base: All respondents

Strong agreement with both statements is higher among Metis and among women versus men. Strong agreement that Canada Post should be allowed to deliver letters less frequently than five days a week is higher among those who support Canada Post operating on its own revenue (55%). The results also suggest softer agreement with a standardized parcel delivery cost among city residents (37% strongly) compared to those living in other locations (48%), which could be due to concerns about subsidizing the costs of parcel delivery for non-urban residents.

#### D. Rural Moratorium

*Majorities of Indigenous people agree with maintaining the rural moratorium with certain adjustments, while over half disagree with ending it outright.*

Respondents were told “Canada Post cannot close post offices in rural areas or convert them to less expensive franchises, due to a temporary freeze, also a called a moratorium, that was introduced by the federal government in 1994. The moratorium prevents the closure or franchising of more than 3,000 post offices and this list has remained unchanged since 1994. Since then, many of these protected locations have become urbanized and their populations have grown significantly.”

Respondents were given three statements related to the rural moratorium and asked to rate their level of agreement with each. Most (84%) Indigenous people agree with a continued moratorium with updated definitions of "rural". A smaller majority (62%) agree with a modified moratorium where rural post offices are replaced with franchises. By comparison, fewer than four in ten (39%) agree with ending the moratorium altogether, with an equivalent proportion (37%) who strongly disagree with this option.

#### Agreement with statements about rural moratorium

<b>Q61-63. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?</b>	<b>NET agree</b>	<b>Strongly agree</b>	<b>Somewhat agree</b>	<b>Somewhat disagree</b>	<b>Strongly disagree</b>	<b>NET disagree</b>
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	<b>84%</b>	47%	37%	10%	2%	<b>12%</b>
The moratorium should be modified to allow rural post offices to be replaced with franchises in stores and pharmacies	<b>62%</b>	26%	36%	18%	17%	<b>35%</b>
The moratorium should end and Canada Post should be allowed to close underused post offices, even if they are in rural areas	<b>39%</b>	12%	27%	19%	37%	<b>56%</b>

Base: All respondents

Level of agreement with these three options for the rural moratorium is largely consistent across the population, with a few exceptions. Strong agreement with a continued moratorium with an updated rural definition is higher in rural (57%) and suburban (55%) areas compared to cities (41%) and reserves (38%), and among women (56%, vs. 38% of men).

### E. Support for new/additional services in rural and remote areas

*There is widespread support among rural and reserve residents for extended services in rural areas.*

Indigenous people living in rural areas and on reserves were asked about measures to better reach Canadians in these areas. Majorities of six in ten or more support all six service change options. Support is highest for providing access to other government services at rural post offices (85%), followed by creating service hubs (80%). There is also good support for providing access to financial services at post offices (71%), increasing the number of rural post offices (68%) and combining small post offices in the same geographic area (68%). As with previous questions, there is a segment opposed to some of the changes, most notably for extending operating hours at rural post office locations (36% opposed). These views are largely consistent across the rural/reserve population.

#### Support for new/additional services among rural and reserve residents

<b>Q64-69. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose Canada Post doing the following to better reach Canadians in rural and remote areas? (n=290)</b>	<b>NET support</b>	<b>Strongly support</b>	<b>Somewhat support</b>	<b>Somewhat oppose</b>	<b>Strongly oppose</b>	<b>NET oppose</b>
Providing convenient access to other government services at rural and remote post offices	<b>85%</b>	42%	43%	7%	4%	<b>25%</b>
Creating service hubs within rural communities that feature a post office as well as services from local organizations or businesses	<b>80%</b>	32%	48%	8%	4%	<b>13%</b>
Providing access to financial services at post offices in rural and remote areas in light of a lack of bank branches	<b>71%</b>	28%	43%	14%	11%	<b>25%</b>
Combining small rural post offices in the same geographic area into a single location that offers enhanced services such as automated parcel lockers available 24 hours a day, 7 days a week	<b>68%</b>	28%	40%	12%	16%	<b>28%</b>
Increasing the number of rural post office locations	<b>68%</b>	33%	35%	17%	10%	<b>27%</b>
Extending hours of operation at rural post office locations	<b>60%</b>	31%	29%	24%	12%	<b>36%</b>

*Base: Rural and on-reserve respondents*

Support for providing access to financial services at post offices in rural and remote areas was higher among those aged 18-34 (68%) and 35-59 (84%) compared to those aged 60+ (35%).



## IV. Tracking from 2016 study

The 2022 questionnaire was written to be relevant to Canada Post's current circumstances, so less emphasis was placed on tracking questions. This section shows results that are comparable to the 2016 study.

### A. Overall satisfaction with Canada Post services

Just over half of the Indigenous population is very satisfied with the overall service of Canada Post and another third are somewhat satisfied, with minimal change from 2016.

#### Overall satisfaction

<b>Overall, how satisfied are you with the services offered by Canada Post?</b>	<b>2022 (n=211)</b>	<b>2016 (n=199)</b>
Very satisfied	53%	55%
Somewhat satisfied	34%	33%
Neither satisfied nor dissatisfied	7%	4%
Somewhat or very dissatisfied	5%	8%

Base: Off-reserve only

### B. Satisfaction with aspects of service

Satisfaction with where mail is received and with the delivery of parcels has not changed notably between 2016 and 2022.

#### Satisfaction with aspects of service

<b>To what extent are you satisfied or dissatisfied with the following aspects of Canada Post's services?</b>	<b>2022 (n=211)</b>	<b>2016 (n=199)</b>
<b>Where you get your mail, such as at your home or a community mailbox</b>		
Very satisfied	57%	59%
Somewhat satisfied	28%	29%
Neither satisfied nor dissatisfied	4%	6%
Somewhat or very dissatisfied	8%	5%
<b>The delivery of parcels by Canada Post</b>		
Very satisfied	43%	47%
Somewhat satisfied	34%	33%
Neither satisfied nor dissatisfied	7%	8%
Somewhat or very dissatisfied	8%	13%

Base: Off-reserve only

### C. Perceived importance of Canada Post services

Results are not notably different when it comes to letter mail taking twice as long to reach individuals. Similar proportions agree that door to door mail delivery is essential for the elderly and people with mobility or health problems in 2022 as in 2016.

#### Perceived importance of services

<i>Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements</i>	<b>2022 (n=211)</b>	<b>2016 (n=199)</b>
<b>If letter mail took twice as long to reach me, I probably would not notice</b>		
Strongly agree	19%	22%
Somewhat agree	25%	26%
Somewhat disagree	21%	18%
Strongly disagree	30%	33%
<b>Door to door mail delivery is essential for the elderly and people with mobility or health problems</b>		
Strongly agree	79%	77%
Somewhat agree	14%	17%
Somewhat disagree	2%	3%
Strongly disagree	2%	2%

Base: Off-reserve only

Note: Category labelling changed between years from "Totally" to "Strongly"

## Appendix A: Methodology

### Background and research 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.

COVID-19 has dramatically changed how Canadians use postal services. Given this shift, this research will help the Government of Canada to better understand Indigenous peoples' views regarding 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.

Areas of inquiry must include all major aspects of the Canadian Postal Service Charter as outlined in the Statement of Work (SOW). The research must also include formulating questions and finding answers to the following areas of inquiry:

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

It should be noted that CPC delivers mail to a central location on First Nations reserves (e.g., Band Office or community centre), but is not responsible for mail delivery to individual households on-reserve.

### Methodology

Environics conducted a telephone survey with a random sample of 425 Indigenous people in the 10 provinces, from April 12 and May 8, 2022.

### Sample design and weighting

The methodology for this survey, as established in the Statement of Work (SOW), is a 20-minute random telephone survey with a representative sample of 425 Indigenous peoples (aged 18 and older), stratified to include 50% living on-reserve and 50% off-reserve. The margin of error for the total sample is plus or minus 4.8

percentage points; for the on-reserve sample it is plus or minus 6.7 percentage points and for the off-reserve it is plus or minus 6.8 percentage points, both at the 95% confidence level.

The sample was disproportionate to the location of this population according to the 2016 Census: 20% on-reserve (who are primarily First Nations) and 80% off-reserve (comprised of 55% in urban areas and 25% in rural areas). However, the disproportionate sample matches the sample design from the 2016 Canada Post research with Indigenous peoples, and ensures an adequate number of Indigenous peoples living on-reserve for analysis purposes. At the analysis stage, the final data set will be weighted to ensure it is representative of the Indigenous population by province, location and identity group.

The sampling approach varied for the on- and off-reserve populations, as described below.

The sample frame for on-reserve interviews was generated by targeting postal codes associated with Census Sub Divisions (CSDs) designated as reserves. Available phone numbers were then collected for each of these postal codes. Within this sample frame, households were randomly selected for inclusion in the study. Respondents were screened to ensure that they are in fact living on reserve, self-identify as First Nations, Inuit or Métis, and are 18 years of age or older.

The interviews were distributed proportionate to the on-reserve population, according to the 2016 Census:

Region	Population	Sample (n)
Atlantic Canada	8%	16
Quebec	11%	22
Ontario	23%	46
Manitoba	14%	28
Saskatchewan	11%	22
Alberta	16%	32
BC	17%	34
<b>Total</b>	<b>100%</b>	<b>200</b>

The sample frame for off-reserve (urban and rural) interviews involved using 2016 Census overlay data to identify Dissemination Areas (DAs)<sup>2</sup> with a larger-than-average proportion of Indigenous peoples, and then to sample randomly within these DAs. Quotas were used to ensure the sample is proportionate to this population by province, location (urban vs. rural) and identity group, according to the 2016 Census. The net incidence of the Indigenous population using this sampling approach is estimated at 10 percent. As with the on-reserve sample, respondents were screened to ensure that they self-identify as First Nations, Inuit or Métis, and are 18 years of age or older.

Given the need for geographic targeting which cannot be done using cell phone sample, the sample for both the on-reserve and off-reserve interviews involved landlines only.

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<sup>2</sup> Dissemination Areas are the smallest geographic units for which census data are available, comprising a population between 400 and 700 persons.

For the off-reserve sample, no quotas were set for interviews with those who receive door-to-door delivery and those who receive mail through community mailboxes. Similarly, questions will be asked to identify limited mobility and autonomous seniors, but these groups will fall out naturally with no guarantee of subsample size.

### **Questionnaire design**

Environics worked with PSPC to develop a questionnaire of 20 minutes' average duration, addressing the study objectives. The questionnaire was developed in parallel with the general population survey, to allow for comparisons wherever possible. Adjustments were made to enhance question comprehension for this audience and remove questions to meet the budgeted interview length (i.e., a telephone survey allows fewer questions than an online survey of the same length, and the pace of telephone interviews with Indigenous peoples tends to be slightly slower than for the general public). Environics translated the approved questionnaire into French, using existing French translation of the general population survey where possible. The survey introduction informed respondents of the survey sponsor, the length of the survey and their privacy rights per federal legislation. Both the English and French versions of the final study questionnaire are included in Appendix B. The questionnaire averaged 22.1 minutes to deliver.

### **Pretest**

A pretest of 13 interviews in English was conducted on April 12, 2022. These interviews included standard Government of Canada pretest probing questions. The average length was 23.9 minutes, necessitating the subsequent deletion of several questions to stay within the budgeted length for the survey (20 minutes).

### **Fieldwork**

Interviewing was conducted by Telepoll, a field house experienced in conducting telephone surveys of Indigenous peoples, using Computer Aided Telephone Interviewing (CATI) technology. Field supervisors were present at all times to ensure accurate interviewing and recording of responses. A minimum of ten percent of each interviewer's work was unobtrusively monitored for quality control in accordance with accepted industry standards.

Data analysts programmed the questionnaire in CATI then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the survey's basic logic. The CATI system handles sampling dialling, quotas and questionnaire completion (skip patterns, branching, and valid ranges). The system also ensures that callbacks are conducted in a timely manner. No number is called twice in a two-hour period. Callbacks are conducted on different days of the week and at different times of the day (i.e. morning, afternoon). This system ensures all scheduled appointments are kept, maximizing the response rate and sample representativeness. Up to eight callbacks was made to each number selected for the sample before it was replaced with a comparable number.

All research work was conducted in accordance with the standards established by federal government Public Opinion Research (POR) requirements, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA).

### **Completion results**

The sample for this survey consisted of 425 interviews with Indigenous peoples. The effective response rate for the survey is 9.4 percent. This is calculated as the number of responding participants (completed interviews plus those disqualified because of survey requirements and quotas being filled), divided by unresolved numbers (e.g.,

busy, no answer) plus non-responding households or individuals (e.g., refusals, language barrier, missed callbacks) plus responding participants [R/(U+IS+R)]. The disposition of all contacts is presented in the following table:

<b>TOTAL</b>	
<b>Total Numbers Attempted</b>	<b>15,856</b>
<b>Out-of-scope - Invalid</b>	<b>1,742</b>
<b>Unresolved (U)</b>	<b>9,140</b>
<i>Busy</i>	312
<i>No answer</i>	3,560
<i>Voicemail</i>	5,268
<b>In-scope - Non-responding (IS)</b>	<b>3,643</b>
<i>Language barrier</i>	118
<i>Callback missed (Respondent not available)</i>	876
<i>Refusal - household</i>	1,067
<i>Refusal - respondent</i>	1,533
<i>Termination</i>	49
<b>In-scope - Responding units (R)</b>	<b>1,331</b>
<i>Completed Interview</i>	425
<i>NQ - Quota Full</i>	9
<i>Disqualified</i>	897
<b>Response Rate</b>	<b>9.4%</b>
<b>Incidence</b>	<b>34.6%</b>
<b>Survey Length</b>	<b>22.1</b>

### Non-response bias analysis

The table below presents a profile of the final sample (unweighted), compared to the actual Indigenous population of Canada (2016 Census information). The final sample underrepresents those aged 18 to 34, which is a typical pattern for public opinion surveys in Canada.

## Non-response bias analysis

Sample type	Sample*	Canada Indigenous Population (2016 Census)
<b>Gender (18+)</b>		
Male	50%	49%
Female	50%	51%
<b>Age</b>		
18-34	18%	36%
35-59	44%	46%
60+	38%	18%

\* Data are unweighted and percentages are calculated based on those giving a response to each demographic question

## Respondent profile

## Respondent Profile

	Total (n=425)
<b>Gender</b>	
Male	49%
Female	51%
<b>Age</b>	
18-34	36%
35-59	46%
60+	18%
<b>Identity</b>	
First Nations	60%
Inuk	4%
Métis	36%
<b>Location</b>	
In a city	33%
In a suburb	20%
In a rural area	24%
On a First Nations reserve	22%
<b>Region</b>	
Atlantic	8%
Quebec	11%
Ontario	23%
Western	58%

## Appendix B: Questionnaire

Environics Research

April 21, 2022

### Canada Post 2022 Phone survey of Indigenous people FINAL Questionnaire

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#### TELEPHONE INTRODUCTION

**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 Environics Research, a public opinion research company. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

**RECORD** *Langage of interview*

01 - English

02 - Français

Today we are conducting a survey with Indigenous people about mail delivery and Canada Post. We are not selling or soliciting anything. The survey is voluntary and your responses will be kept entirely confidential and anonymous. This survey is registered with the national survey registration system and will be administered in accordance with the Privacy Act. It will take about 20 minutes to complete.

[**IF ASKED:** This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website: [www.canadianresearchinsightscouncil.ca](http://www.canadianresearchinsightscouncil.ca) and reference project code xxxxx.]

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.

1. May I please speak to the Indigenous person in your household who deals with the mail?



**Screening questions**

2. Which of the following best describes you? Are you...?

**READ**

01 - First Nations

02 - Inuk

03 - Métis

04 - or, a non-Indigenous person

**DO NOT READ**

05 - Inuit

06 - Inuvialuit

98 - Other (SPECIFY)

99 – DK/REFUSE

**IF Q2=04 OR 99, ASK Q3. OTHERWISE SKIP TO Q4.**

3. Is there anyone else living in this household who is First Nations, Inuk or Métis?

01 – Yes                      Ask to speak to the person; re-introduce and start at Q2

02 – No                      THANK AND END SURVEY

03 – DK/NA                THANK AND END SURVEY

4. RECORD FROM SAMPLE:

01 – Newfoundland and Labrador

02 – Prince Edward Island

03 – Nova Scotia

04 – New Brunswick

05 – Quebec

06 – Ontario

07 – Manitoba

08 – Saskatchewan

09 – Alberta

10 – British Columbia

11 – Yukon

12 – Northwest Territories

13 – Nunavut

5. Are you currently living...?

READ

01 – In a city

02 – In a suburb

03 – In a rural area

04 – On a First Nations reserve

DO NOT READ

99 - REFUSED

6. In which of the following age categories do you belong?

READ; STOP WHEN REACH CORRECT CATEGORY

01 - 18 to 24

02 - 25 to 34

03 - 35 to 44

04 - 45 to 54

05 - 55 to 59

07 – 60-64

06 - or 65 or older?

DO NOT READ

99 - REFUSED

7. How do you identify your gender?

DO NOT READ EXCEPT TO CLARIFY

01 - Male

02 - Female

03 – Another gender [DO NOT CODE]

DO NOT READ

99 - REFUSED

**Current Service**

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

**READ**

01 - To your door

02 - In a centralized box in your apartment building or condo

03 - In a community mailbox

04 - In a rural mailbox at the side of the road

05 - In a postal box at a post office or retail outlet

**DO NOT READ**

99 - DK/NA

9. How far from your home is your nearest post office?

**READ**

01 - 2.5 km or less

02 - More than 2.5 km, but less than 5km

03 - Between 5 and 15 km

04 - More than 15 km

**DO NOT READ**

99 - DK/NA

**Usage**

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

**READ AND RANDOMIZE**

Statement	Never	A few times a year	Monthly	Weekly	Daily	[DO NOT READ] DK/NA
10. Personal correspondence such as letters and cards	01	02	03	04	05	99
11. Bill payments	01	02	03	04	05	99

12. Parcels	01	02	03	04	05	99
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In the past year, have you done each of the following at the post office weekly, monthly, a few times a year, or never?

READ AND RANDOMIZE

Statement	Never	A few times a year	Monthly	Weekly	[DO NOT READ] DK/NA
13. Sent a parcel to friends or family	01	02	03	04	99
14. Picked up a parcel	01	02	03	04	99
15. Returned an item that you purchased online	01	02	03	04	99
16. DELETED					
17. Bought stamps	01	02	03	04	99
18. Accessed financial services such as MoneyGram or a Canada Post My Money loan	01	02	03	04	99
19. DELETED	deleted	deleted	deleted	deleted	deleted

How likely would you be to make use of the following services if they were offered at your local post office? Would you certainly, probably, probably not or certainly not [ITEM]?

READ AND RANDOMIZE

Statement	Certainly	Probably	Probably not	Certainly not	[DO NOT READ] DK/NA
20. Become a client of Canada Post banking services	01	02	03	04	99
21. Use government services like those offered at Service Canada outlets	01	02	03	04	99

**Changes due to COVID-19:**

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

01 - Yes

02 – No **SKIP TO NEXT SECTION**

99 – DK/NA **SKIP TO NEXT SECTION**

Please tell me 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.

Statement	A lot more	Somewhat More	About the same	Somewhat Less	A lot less	[DO NOT READ] DK/NA
23. Send letter mail	01	02	03	04	05	99
24. Order parcels online	01	02	03	04	05	99
25. Send parcels to friends and family	01	02	03	04	05	99

26. DELETED

**Satisfaction with Canada Post Services**

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

**READ AND RANDOMIZE**

Statement	Very satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied	[DO NOT READ] DK/NA
27. Where you get your mail, such as at your home or a community mailbox	01	02	03	04	05	99
28. DELETED	deleted	deleted	deleted	deleted	deleted	deleted
29. DELETED	deleted	deleted	deleted	deleted	deleted	deleted
30. The delivery of parcels by Canada Post	01	02	03	04	05	99

31. Overall, how satisfied are you with the services offered by Canada Post?

READ SCALE ONLY IF NECESSARY

01 – Very satisfied

02 – Somewhat satisfied

03 – Neither satisfied nor dissatisfied

04 – Somewhat dissatisfied

05 – Very dissatisfied

DO NOT READ

99 – DK/NA

### Perceptions/Attachment

Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.

READ AND RANDOMIZE

Statement	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	[DO NOT READ] DK/NA
32. DELETED	deleted	deleted	deleted	deleted	deleted
33. If letter mail took twice as long to reach me, I probably would not notice	01	02	03	04	99
34. Door to door mail delivery is essential for the elderly and people with mobility or health problems	01	02	03	04	99
35. It doesn't 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	01	02	03	04	99
36. SPLIT SAMPLE/ASK 50% OF RESPONDENTS: Canada Post continues to be an important and essential service for Canadians	01	02	03	04	99
37. SPLIT SAMPLE/ASK 50% OF RESPONDENTS: Canada Post continues to be an important and essential service for me	01	02	03	04	99

## Challenges in Rural and Remote Areas

ASK SECTION ONLY OF RURAL & RESERVE RESPONDENTS:

How much of a challenge do each of the following pose to you personally? Starting with [FIRST ITEM], is it [READ SCALE]?

READ AND RANDOMIZE. REPEAT SCALE ONLY AS NECESSARY.

Statement	No challenge at all	Only a minor challenge	A moderate challenge	A fairly significant challenge	A very significant challenge	[DO NOT READ] DK/NA
38. The distance to your post office	01	02	03	04	05	99
39. The hours of operation of your post office	01	02	03	04	05	99
40. DELETED	deleted	deleted	deleted	deleted	deleted	deleted
41. Delivery times for parcels	01	02	03	04	05	99
42. DELETED	deleted	deleted	deleted	deleted	deleted	deleted
43. The cost of shipping parcels from your community	01	02	03	04	05	99



## Pricing and Affordability of Rates

### ASK ALL

44. 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 and 92-cents when you buy a booklet of ten, domestic stamps are under-priced for their value.

Do you...?

### READ

01 – Strongly agree

02 – Somewhat agree

03 – Somewhat disagree

04 – Strongly disagree

### DO NOT READ

99 – DK/NA

What is the **maximum** amount you feel is reasonable to pay for a single stamp to deliver a letter [FIRST ITEM]?  
Would you say \$1.00, \$1.25, \$1.50, \$1.75 or \$2.00?

### READ IN ORDER SHOWN

Statement	\$1.00	\$1.25	\$1.50	\$1.75	\$2.00	[DO NOT READ] DK/NA
45. Within your city or town	01	02	03	04	05	99
46. Within your province	01	02	03	04	05	99
47. Across the country	01	02	03	04	05	99

### Canada Post's Financial Realities and Support for Different Measures

Canada Post has lost hundreds of millions of dollars over the past four years. This is due to the decline of mail revenues 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. However, to address its losses, it needs some combination of government funding, increased revenue or decreased costs.

48. DELETED

49. DELETED

50. Of the two statements, which **one** most closely reflects your opinion?

#### READ AND RANDOMIZE

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

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

#### DO NOT READ

03 – Both/depends

99 – DK/NA

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.

#### READ AND RANDOMIZE

Statement	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	[DO NOT READ] DK/NA
51. Reduce the number of post offices	01	02	03	04	99
52. Replace corporate owned post offices with less expensive franchises in grocery stores and pharmacies	01	02	03	04	99
53. 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 other health challenges	01	02	03	04	99

54. Reduce the frequency of letter mail delivery from five days a week to every other day	01	02	03	04	99
55. Increase the basic price of a stamp by roughly 25 cents	01	02	03	04	99
56. Install outdoor and automated parcel lockers that are available 24 hours a day, seven days a week [IF ASKED: 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.]	01	02	03	04	99
57. The Government of Canada directly subsidizes more costly and unprofitable postal services in rural and remote communities	01	02	03	04	99

### Canadian Postal Service Charter

Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements relating to Canada Post Services?

#### READ AND RANDOMIZE

Statement	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	[DO NOT READ] DK/NA
58. All Canadians should shoulder the same cost for parcel delivery, regardless of the distance	01	02	03	04	99
59. Canada Post should be allowed to deliver letters less frequently than five days a week to reduce costs	01	02	03	04	99

### Convenient Access to Postal Services

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

#### READ LIST

01 - 2.5 km or less

02 - More than 2.5 km, but less than 5km

03 - Between 5 and 15 km

04 - More than 15 km

DO NOT READ

99 - DK/NA

### Rural Moratorium

#### ASK ALL

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

Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

#### READ AND RANDOMIZE

Statement	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	[DO NOT READ] DK/NA
61. 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.	01	02	03	04	99
62. The moratorium should be modified to allow rural post offices to be replaced with franchises in stores and pharmacies.	01	02	03	04	99
63. The moratorium should end and Canada Post should be allowed to close underused post offices, even if they are in rural areas.	01	02	03	04	99

### Support for new/additional services in Rural and Remote Areas

#### ASK SECTION ONLY OF RURAL & RESERVE RESPONDENTS:

Do you strongly support, somewhat support, somewhat oppose or strongly oppose Canada Post doing the following to better reach Canadians in rural and remote areas?

## READ AND RANDOMIZE

Statement	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	[DO NOT READ] DK/NA
64. Providing access to financial services at post offices in rural and remote areas in light of a lack of bank branches	01	02	03	04	99
65. Providing convenient access to other government services at rural and remote post offices	01	02	03	04	99
66. Increasing the number of rural post office locations	01	02	03	04	99
67. Extending hours of operation at rural post office locations	01	02	03	04	99
68. Combining small rural post offices in the same geographic area into a single location that offers enhanced services such as automated parcel lockers available 24 hours a day, 7 days a week [IF ASKED: 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]	01	02	03	04	99
69. Creating service hubs within rural communities that feature a post office as well as services from local organizations or businesses	01	02	03	04	99

## Demographics

We are almost finished. I just have a few questions left for classification purposes.

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

DO NOT READ, RECORD ALL THAT APPLY

01 – English

02 – French

03 – Other (SPECIFY)

99 – DK/REFUSED

71. 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.

READ, STOP WHEN REACH CORRECT CATEGORY

01 – Under \$20,000

02 – \$20,000 to just under \$40,000

03 – \$40,000 to just under \$60,000

04 – \$60,000 to just under \$80,000

05 – \$80,000 to just under \$100,000

06 – \$100,000 to just under \$150,000

07 – \$150,000 and above

DO NOT READ

99 – DK/REFUSED

72. Do you have a condition that limits your physical mobility?

01 - Yes

02 – No                      SKIP TO Q74

99 – DK/REFUSED        SKIP TO Q74

73. [IF Q72=01] Do you receive assistance or accommodation from Canada Post for how you receive mail?

01 - Yes

02 – No

99 – DK/REFUSED

74. Do you identify as a person with a disability?

[IF ASKED: A person with a disability has a long-term or recurring impairment (such as vision, mobility, flexibility, dexterity, pain, learning, developmental, memory or mental health-related) which impacts their daily activities.]

01 - Yes

02 – No

99 – DK/REFUSED

**Thank and end survey**