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Canadian Businesses' Views on Canada Post Services (2022) Final Report

Prepared for Public Services and Procurement Canada

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Canada

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This public opinion research report presents the results of an online survey conducted by Earnscliffe Strategy Group on behalf of Public Services and Procurement Canada. The quantitative research was conducted in April and May of 2021.

Cette publication est aussi disponible en français sous le titre: Points de vue des entreprises canadiennes sur les services de Postes Canada (2022)

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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Public Services and Procurement Canada (PSPC) summarizing the results of the follow-up Canadian business survey to better understand Canadian businesses’ views regarding how Canada Post (CPC) serves them today and how they wish to be served into the future.

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. The previous iteration of this research program was conducted in 2016. In 2018, the government affirmed that Canada Post is expected to continue to meet the expectations laid out in the Charter.

Furthermore, COVID-19 has dramatically changed how Canadians use postal services. Given this shift, this research will help the Government of Canada to better understand Canadians business’ 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. The contract value for this project was \$137,722.94 including HST.

This research was commissioned to capture the current views of Canadian businesses about the mail and their current expectations of CPC, especially in the wake of the COVID-19 pandemic, and CPC’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.”

The overarching objective of this research was to measure perceptions and behaviours of businesses across Canada and to assess all major aspects of the Canadian Postal Service Charter, as well as track key metrics from 2016. The research will be used to determine what changes to the Canadian Postal Service Charter are required, if any, to ensure Canada Post’s service standards and related activities remain universal, affordable, reliable, convenient, secure and responsive to the needs of businesses in Canada.

To meet these objectives, Earnscliffe conducted a quantitative research program consisting of a telephone survey of 1,102 businesses across Canada. The survey was conducted in collaboration with our quantitative sub-contractor, Elemental, using their centralized call-centre using state of the art Computer Aided Telephone Interviewing (CATI) system. The survey was conducted from April 14th to May 10th, 2022 and was an average of 20 minutes in length.

The data have been weighted to reflect the geographic distribution of businesses in Canada by province and by community type (i.e., urban or suburban, and rural). The margin of error for a sample of this size is +/- 2.95%.

To ensure sufficient representation of Canadian businesses at all business sizes and locations, quotas were set by region, business size and community type.

The key findings from the quantitative research are presented below.

Current CPC service and usage

- Half (48%) of businesses receive their mail to their door, while the remaining get their mail from a postal box (20%), a community mailbox (13%) or a centralized box (12%). Large businesses are more likely to have their mail delivered to them directly, whereas small businesses are more likely to get their mail at a community (16%) or rural mailbox (7%).
- Nearly all businesses send and receive mail (lettermail and correspondence) from CPC, and there is a positive correlation between business size and the volume of mail sent and received.
- The volume of mail sent and received by businesses via CPC has decreased since 2016.
- Half (51%) of businesses send parcels and one in five businesses (22%) send admail.
- Businesses in rural communities are more likely to receive parcels (82%) than businesses in urban (73%) and suburban (71%) areas.
- Compared to 2016, there has been an increase in the volume of parcels sent via CPC (51% versus 42%).
- Convenience is the most common reason CPC is used for all three delivery services (mail, admail and parcels). Rounding out the top four for each are having no other service option, price and reliability. Price is the main reason for one in five businesses (20%) who send parcels with CPC, which is higher than for mail and admail.
- The majority of businesses say that the ability to send lettermail and parcels is at least moderately important (84% for both), including a majority who say it is important (68% and 61%, respectively); however, that trend is less distinct for admail (69% say it is at least moderately important).
- Just as larger businesses (those with 20 employees or more) are more likely to send greater volumes of mail than small businesses, they are also more likely to deem this service important to the health of their business.
- Sending parcels is considered more important now than in 2016 (61% versus 55%), whereas admail is considered important by fewer businesses now (42% versus 53%).
- Receiving both lettermail (81%) and parcels (60%) are considered important by the majority of businesses. Compared to 2016, lettermail is important to more businesses now than in 2016 (when it was considered important by 73% of businesses).
- Half of businesses say that finding a replacement for delivery of lettermail and admail would be at least moderately easy (48% and 50%, respectively), whereas three quarters of businesses (76%) believe the same of parcels; however, there are fewer businesses who would find switching easy now compared to 2016. Urban businesses are more likely to believe they could easily find a replacement to CPC for parcel delivery.

Convenient access to postal services

- Nearly half (45%) of Canadian businesses do go to the post office to make a purchase a few times per year (between monthly and a few times per year), whereas 11% go at least weekly. Large businesses are significantly more likely to go to the post office daily (8%) and rural businesses are more likely to go to the post office at least weekly (23%).
- The majority (63%) of businesses are located within 2.5 km of a post office and 12% are 5 km or further. Seven in ten businesses (70%) say they are willing to travel further than 2.5 km to their nearest post office.
- Businesses in rural communities are more likely to be located 5 to 15 km from their nearest post office (17%) and accordingly are more likely to be willing to travel at least 5 km to the post office (43%).

Changes due to COVID-19

- While 17% of businesses say the pandemic changed how they use CPC services, among those who say it has, the majority indicate it has decreased their use of mail delivery, for both invoices, payments, and statements (63% say it has decreased) and correspondence (53% say it has decreased). A plurality of businesses indicate no change in usage of CPC delivery for parcels (49%) and admail (42%).

Satisfaction with, perceptions of, and attachment to CPC

- Nearly all businesses (91%) say they are satisfied with CPC's services, overall. This result has improved since 2016, when 83% of businesses said they were satisfied.
- Satisfaction with the various facets of CPC's service is high, ranging from 91% for the frequency of mail delivery to 77% for parcel delivery. Furthermore, 90% of businesses are satisfied with where they get their mail and 82% with the speed of their mail delivery.
- Large businesses are significantly more likely to be satisfied with the speed of the delivery of their mail (92%) than smaller businesses.
- In terms of value for money, CPC performs exceptionally well in terms of its lettermail delivery services (with 86% of businesses saying the value for money is very good) and for its parcel and admail delivery (79% and 72%, respectively).
- Small businesses are less likely to agree that CPC provides very good value for money for its lettermail delivery (82%).

- Most businesses believe that CPC continues to be an important and essential service for Canadian business (94%) and that it does not matter if a post office is in a pharmacy/grocery store so long as the prices and services are the same (86%). However, significantly fewer, one third (32%) of businesses, agree that if it took twice as long for mail to reach them, they probably would not notice.

CPC's financial realities and support for different measures

- Three quarters (77%) of businesses believe that CPC should receive government funding to maintain their current service offerings and 56% believe that CPC should only provide the level of service of which their revenue can support.
- Among businesses who hold a paradoxical viewpoint (both agree or disagree with the aforementioned statements), when presented with a forced choice, the majority (72%) believe that CPC should receive federal government funding to maintain their current service level.
- While there are some differences in the intensity of level of agreement across business size and community type, all businesses are more likely to agree that CPC should receive federal funding to maintain their services than to think that the CPC services should align to its revenue.
- Support for measures to reduce CPC's losses varies, as follows:
 - Most businesses support government subsidies (78%), replacing corporate owned post offices with franchises (74%), installing outdoor/automated parcel lockers (69%), and ending door-to-door home delivery (67%).
 - Support is lower for reducing the frequency of delivery (51%) and there is more opposition than support for reducing number or post offices (36% support and 60% oppose) and increasing the price of stamps (42% support and 57% oppose).
- Approximately half of businesses agree that CPC should be allowed to deliver less frequently to reduce costs (57%) or that Canadians should shoulder the same cost for parcel delivery regardless the distance (52%).
- The majority of businesses are not likely to access other government services at the post office or become a client of Canada Post banking services, however, small businesses are more likely to use both (other government services: 24% and banking services: 10%).
- Although 57% opposed increasing the price of stamps by 25%, a significant majority (86%) agreed that Canada Post provides very good value for its letter mail delivery services.

Challenges and services in rural and remote areas

- The research suggests that reliance on Canada Post is greater among businesses located in rural areas; evidenced by being more likely than businesses located in suburban or urban areas to receive their parcels by Canada Post and visit the post office at least weekly (outlined above).
- When it comes to the Rural Moratorium, most businesses agree with amending (88%) or modifying (80%) it, however the opposite is true of ending it. More businesses disagree with ending it (57%) than agree (40%).
- Rural businesses were asked about potential challenges they face that relate to CPC services. Among all the challenges tested, the cost of shipping parcels provides the most significant challenge for rural business (16% say it is a significant challenge and 31% say it is a moderate challenge). Most rural businesses do not believe that shipping and delivery currently pose a significant challenge to them.
- Most rural businesses would support access to government services in their post offices (82%) and the creation of “service hubs” (81%). The majority would support combining small post offices (71%) and providing access to financial services in post offices (68%). Despite strong support for those potential options, support is significantly lower for extending post office hours (56%) or increasing the number of post offices (40%).

Research Firm:

Earnscliffe Strategy Group Inc. (Earnscliffe)

Contract Number: EP363-222455/001/CY

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I hereby certify as a Representative of Earnscliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity 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: 

Date: June 1, 2022

Doug Anderson
Principal, Earnscliffe

Introduction

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Public Services and Procurement Canada (PSPC) summarizing the results of the follow-up Canadian business survey to better understand Canadian businesses’ views regarding how Canada Post (CPC) serves them today and how they wish to be served into the future.

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. The previous iteration of this research program was conducted in 2016.

Furthermore, COVID-19 has dramatically changed how Canadians use postal services. Given this shift, this research will help the Government of Canada to better understand Canadians business’ 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. The contract value for this project was \$137,722.94 including HST.

This research was commissioned to capture the current views of Canadian businesses about the mail and their current expectations of CPC, especially in the wake of the COVID-19 pandemic, and CPC’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.”

The overarching objective of this research was to measure perceptions and behaviours of businesses across Canada and to assess all major aspects of the Canadian Postal Service Charter including, but not limited to:

1. Universal Service and Services in Rural Regions of the Country
 - a. Potential changes to the universal service obligation (i.e., expand scope of services beyond delivery).
2. Affordability of Rates
 - a. Maintain uniformity of postage rates for letters? (and potentially expand to parcels?).
 - b. Reasonableness of postage rates (acceptability of increased stamp prices, how should affordability be measured?).
 - c. The need to charge rates sufficient to cover the costs incurred in its operations.
3. Frequency and Speed of Delivery
 - a. Requirement for delivery 5 days a week and/or slower delivery of lettermail.
4. Convenient Access to Postal Services
 - a. Willingness to travel further to the nearest post office.
 - b. Support for maintaining the moratorium on the closure of corporate rural post offices vs replacing corporate post offices with less expensive franchises.

In addition to the objective above, the research included 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; and,
- Support for providing government funding to Canada Post in lieu of price increases/service reductions/job reductions.

The following was included to measure trends with previously conducted research on Canadian Business' Views on Canada Post Services in 2016.

1. Overall satisfaction level of Canadian businesses with CPC services; and,
2. Percentage of businesses that agree that CPC provides value for money.

To meet these objectives, Earncliffe conducted a quantitative research program consisting of a telephone survey of 1,102 businesses across Canada. The survey was conducted in collaboration with our quantitative sub-contractor, Elemental, using their centralized call-centre using state of the art Computer Aided Telephone Interviewing (CATI) system. The survey was conducted from April 14th to May 10th, 2022 and was an average of 20 minutes in length.

The data have been weighted to reflect the geographic distribution of businesses in Canada by province and by community type (i.e., urban or suburban, and rural). The margin of error for a sample of this size is +/- 2.95%.

To ensure sufficient representation of Canadian businesses at all business sizes and locations, quotas were set as outlined in the table below.

The original sampling frame was as follows:

Segment	Population	Distribution (%)	Target quota	Actual sample size
Canada	1,246,454	-	1,100	1,102
Region				
Atlantic	86,112	6.9%	100	100
Quebec	256,494	20.6%	240	240
Ontario	446,020	35.8%	330	330
Prairies (Manitoba & Saskatchewan)	84,240	6.8%	100	100
Alberta	181,961	14.6%	160	161
British Columbia	191,627	15.4%	170	171
Business size (number of employees)				
Under 20	1,085,675	87.1%	475	477
20 to 49	103,477	8.3%	275	275
50-99	32,731	2.6%	200	200
100+	24,571	2%	150	150
Community type				
Urban/Suburban	1,022,092	82%	850	821
Rural	224,362	18%	250	281

Within the tables included in the body of the report, letters below percentages indicate results that are significantly different than those found in the specific comparison columns indicated by the letter. Unless otherwise noted, differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test. Due to rounding, results may not add to 100%.

The detailed findings from this research are presented in subsequent sections of this report. Appended to this report are the survey instrument and data tables (presented under a separate cover).

Detailed findings

The following report is divided into six sections:

- Current CPC service and usage;
- Convenient access to postal services;
- Changes due to COVID-19;
- Satisfaction with, perceptions of and attachment to CPC;
- CPC’s financial realities and support for different measures; and,
- Challenges and services in rural and remote areas.

Each section presents the findings informed by the quantitative survey. The findings focus primarily on the differences across business size (as defined by number of employees) and community type. Where applicable, the results have also been compared to the findings from 2016.

For the purposes of this report, ‘large’ business is defined as businesses that have 100 or more employees and ‘small’ businesses are those that have fewer than 20 employees. Respondents were asked to self-identify the community in which their business is located, either urban, suburban or rural.

Details about the survey design, methodology, sampling approach, and weighting of the results may be found in the Survey Methodology Report in Appendix A. Percentages may not add up to 100% due to rounding. “Don’t know”, “no response”, or “prefer not to say” are denoted by “DK/NR”.

Section A: Current CPC service and usage

In order to assess current service delivery method and usage of postal services, respondents were asked to provide the current volume of mail, admail and parcels they currently send and receive, how mail gets delivered to them, and the importance CPC plays in their business.

Specifically, respondents were asked how mail is delivered to their business. Half (48%) of businesses receive their mail to their door. Fewer but similar proportions of businesses get their mail from a postal box (20%), a community mailbox (13%) or a centralized box (12%). Rural mailboxes are used by 6% of businesses.

Businesses with 20 employees or more are more likely than smaller businesses to get their mail delivered to their door. Conversely, businesses with fewer than 20 employees are more likely to get their mail from a community (16%) or rural mailbox (7%).

Urban businesses are more likely to get their mail delivered to their door (62%) or to a centralized box (17%) and are less likely to get their mail from a postal box (8%) or rural mailbox (1%). Rural businesses are more likely than businesses in urban and suburban businesses to get their mail from a postal box (47%) or rural mailbox (14%).

Exhibit A1 – Q5. How does mail get delivered to your business? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
To your door	48%	43%	52%	54%	62%	52%	19%
	-	-	B	B	F G	G	-
A postal box	20%	20%	20%	22%	8%	17%	47%
	-	-	-	-	-	E	E F
A community mailbox	13%	16%	12%	7%	11%	16%	15%
	-	D	-	-	-	-	-
A centralized box in the office building	12%	13%	11%	13%	17%	8%	4%
	-	-	-	-	F G	-	-
A rural mailbox	6%	7%	6%	3%	1%	7%	14%
	-	D	-	-	-	E	E F
DK/NR	1%	1%	1%	1%	1%	0%	1%
	-	-	-	-	F	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Nearly all businesses send mail through CPC in an average month, while half (51%) send parcels and one in five businesses (22%) send admail.

There is a correlation between business size and volume of mail sent through CPC in an average month. That is, smaller businesses (fewer than 20 employees) send less mail than businesses with 20-99 employees and 100 or more employees. However, that trend does not exist for admail or parcels, where results are consistent across business size.

A couple notable differences in volume exist between businesses in different community types. Businesses in suburban communities are less likely than businesses in urban or rural areas to send large quantities of invoices, payments, and statements (101 or more) in an average month (9% versus 17% and 20%, respectively). Rural businesses are more likely to send parcels (41% send none, versus 51% of urban and 56% of suburban businesses), though they tend to send less volume (55% send under 25, versus 41% for urban and 37% of suburban businesses).

Exhibit A2 – Q7. What is the approximate volume of mail you send through Canada Post in an average month? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Invoices, payments, and statements							
None	11%	17%	9%	1%	11%	15%	11%
	-	C D	D	-	-	-	-
Under 25	40%	54%	32%	24%	40%	42%	40%
	-	C D	-	-	-	-	-
25-100	30%	23%	36%	34%	30%	32%	29%
	-	-	B	B	-	-	-
101 or more	17%	5%	21%	40%	17%	9%	20%
	-	-	B	B C	F	-	F
DK/NR	2%	1%	3%	1%	2%	2%	0%
	-	-	-	-	G	-	-
Correspondence							
None	28%	34%	26%	15%	27%	30%	28%
	-	C D	D	-	-	-	-
Under 25	47%	51%	46%	41%	45%	54%	49%
	-	D	-	-	-	-	-
25-100	16%	10%	19%	27%	17%	8%	17%
	-	-	B	B	F	-	F
101 or more	5%	2%	6%	11%	6%	4%	4%
	-	-	B	B	-	-	-
DK/NR	3%	2%	3%	6%	4%	4%	1%
	-	-	-	-	G	-	-
Addressed and unaddressed admail or bulk mail							

None	78%	78%	78%	75%	76%	77%	81%
	-	-	-	-	-	-	-
Under 25	13%	15%	13%	11%	14%	16%	11%
	-	-	-	-	-	-	-
25-100	4%	3%	4%	5%	5%	1%	3%
	-	-	-	-	F	-	-
101 or more	4%	3%	4%	5%	3%	5%	4%
	-	-	-	-	-	-	-
DK/NR	2%	1%	1%	4%	2%	2%	1%
	-	-	-	-	-	-	-
Parcels							
None	49%	48%	52%	41%	51%	56%	41%
	-	-	D	-	G	G	-
Under 25	45%	47%	41%	47%	41%	37%	55%
	-	-	-	-	-	-	E F
25-100	4%	4%	4%	7%	5%	3%	3%
	-	-	-	-	-	-	-
101 or more	2%	1%	1%	3%	2%	2%	1%
	-	-	-	-	-	-	-
DK/NR	1%	0%	1%	1%	1%	2%	0%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Compared to 2016, businesses in Canada appear have reduced volumes of mail through CPC. In 2016, 34% of businesses sent 101 or more invoices, payment, and statements and 11% sent 101 or more pieces of correspondence, compared to 17% and 5% of businesses in 2022. Conversely, more business in 2022 send parcels (51%) than in 2016 (42%).

Exhibit A3 – Q7. What is the approximate volume of mail you send through Canada Post in an average month? All respondents.

Column %	Total 2022	Total 2016
Invoices, payments and statements		
None	11%	8%
	B	-
Under 25	40%	30%
	B	-
25-100	30%	27%
	-	-
101 or more	17%	34%
	-	A
DK/NR	2%	0%
	-	-
Correspondence		
None	28%	26%
	-	-
Under 25	47%	41%
	B	-
25-100	16%	18%
	-	-
101 or more	5%	11%
	-	A
DK/NR	3%	0%
	-	-
Parcels		
None	49%	58%
	-	B
Under 25	45%	36%
	B	-
25-100	4%	N/A
	-	-
101 or more	2%	N/A
	-	-
DK/NR	1%	0%
	-	-
Sample size	1102	1202
Column labels	A	B

When asked their average volume of mail, admail and parcels received via CPC in an average month, most respondents indicate that their businesses do receive mail (97% receive invoices, payments, and statements and 85% receive correspondence), admail (84%) and parcels (75%) via CPC in an average month.

As was noted for mail sent, there is a correlation between the volume of mail received and business size. As the number of employees increases, so too does the volume of lettermail, admail and parcels.

Businesses in rural communities are more likely to receive parcels (82%) than businesses in urban (73%) and suburban (71%) areas.

Exhibit A4 – Q8. What is the approximate volume of the mail you receive through Canada Post in an average month? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Invoices, payments, and statements							
None	3%	4%	2%	1%	2%	6%	3%
	-	D	-	-	-	-	-
Under 25	36%	53%	24%	16%	36%	37%	35%
	-	C D	D	-	-	-	-
25-100	44%	36%	52%	46%	44%	42%	45%
	-	-	B	B	-	-	-
101 or more	16%	6%	21%	33%	16%	13%	17%
	-	-	B	B C	-	-	-
DK/NR	1%	0%	1%	4%	1%	2%	1%
	-	-	-	B	-	-	-
Correspondence							
None	15%	19%	13%	7%	14%	22%	15%
	-	C D	D	-	-	E	-
Under 25	52%	58%	52%	33%	53%	51%	49%
	-	D	D	-	-	-	-
25-100	26%	21%	27%	41%	25%	23%	30%
	-	-	B	B C	-	-	-
101 or more	5%	2%	5%	12%	5%	2%	5%
	-	-	B	B C	F	-	-
DK/NR	2%	1%	3%	6%	3%	2%	1%
	-	-	-	B	G	-	-
Addressed and unaddressed admail or bulk mail							
None	16%	17%	16%	16%	15%	18%	17%
	-	-	-	-	-	-	-
Under 25	48%	55%	45%	32%	45%	55%	50%
	-	C D	D	-	-	E	
25-100	28%	22%	31%	35%	30%	21%	25%

	-	-	B	B	F	-	-
101 or more	5%	3%	5%	12%	6%	2%	6%
	-	-	-	B C	F	-	-
DK/NR	3%	3%	3%	4%	4%	3%	2%
	-	-	-	-	-	-	-
Parcels							
None	25%	29%	23%	15%	27%	29%	18%
	-	C D	D	-	G	G	-
Under 25	63%	61%	66%	60%	60%	62%	69%
	-	-	-	-	-	-	E
25-100	10%	8%	9%	20%	10%	6%	12%
	-	-	-	B C	-	-	F
101 or more	1%	1%	1%	5%	1%	1%	1%
	-	-	-	B C	-	-	-
DK/NR	1%	1%	2%	0%	2%	2%	0%
	-	D	D	-	G	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

While businesses appear to send less lettermail now than in 2016, the reduction of volume businesses receive is less significant. While 19% more businesses received 101 or more pieces of lettermail in 2016 than now, 80% of businesses now receive 100 piece or fewer, compared to 61% in 2016. There is no notable change in the volume of parcels received by CPC compared to 2016.

Exhibit A5 – Q8. What is the approximate volume of mail you receive through Canada Post in an average month? All respondents.

Column %	Total 2022	Total 2016
Invoices, payments, and statements		
None	3%	2%
	-	-
Under 25	36%	31%
	B	-
25-100	44%	30%
	B	-
101 or more	16%	35%
	-	A
DK/NR	1%	0%
	-	-
Parcels		
None	25%	28%
	-	-
Under 25	63%	63%
	-	-
25-100	10%	N/A
	-	-
101 or more	1%	N/A
	-	-
DK/NR	1%	0%
	-	-
Sample size	1102	1202
Column labels	A	B

Respondents were asked the main reason they use CPC to deliver their mail, admail and parcels and were provided a list of potential reasons, as well as an “other” response option. By a significant margin, convenience is the most common reason CPC is used for all three delivery services.

Following convenience, one fifth (22%) of businesses think there is no other service option for delivering their mail. The same number of businesses say the main reason they use CPC to deliver their mail is price (12%) and reliability (11%).

Businesses in rural communities are significantly more likely to say the main reason they send their mail from CPC is that there is no other service option (29%), compared to businesses in urban (20%) and suburban (17%) areas.

Exhibit A6 – Q9. What is the main reason that you currently use Canada Post to deliver your mail? Among those who send mail with Canada Post. Among those who send mail with Canada Post.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Convenience	44%	42%	47%	41%	42%	49%	46%
	-	-	-	-	-	-	-
No other service option	22%	23%	22%	19%	20%	17%	29%
	-	-	-	-	-	-	E F
Price	12%	12%	10%	18%	16%	11%	5%
	-	-	-	C	G	-	-
Reliability	11%	11%	11%	13%	12%	10%	10%
	-	-	-	-	-	-	-
Never got around to changing	4%	4%	5%	5%	4%	6%	4%
	-	-	-	-	-	-	-
Speed	2%	2%	3%	0%	2%	4%	2%
	-	D	D	-	-	-	-
Good service/customer's choice	1%	1%	1%	1%	1%	1%	1%
	-	-	-	-	-	-	-
Other	1%	1%	1%	1%	1%	1%	1%
	-	-	-	-	-	-	-
Don't use Canada post/use another service	1%	1%	0%	1%	1%	1%	0%
	-	-	-	-	-	-	-
DK/NR	2%	2%	1%	2%	2%	2%	1%
	-	-	-	-	-	-	-
Sample size	1012	415	449	148	619	129	264
Column labels	A	B	C	D	E	F	G

Unlike mail, fewer businesses say the main reason they send their admail through CPC is due to the lack of competition (14%). Instead, the second top reason is price (at 14%), and a similar proportion of businesses note CPC’s reliability (11%).

Exhibit A7 – Q10. What is the main reason that you currently use Canada Post to deliver your admail? Among those who send admail with Canada Post. Among those who send admail with Canada Post.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Convenience	36%	46%	26%	32%	34%	48%	34%
	-	C	-	-	-	-	-
Price	14%	11%	16%	18%	17%	9%	8%
	-	-	-	-	-	-	-
No other service option	12%	8%	17%	8%	6%	18%	22%
	-	-	-	-	-	-	E
Reliability	11%	9%	12%	15%	14%	3%	8%
	-	-	-	-	-	-	-
Never got around to changing	9%	8%	9%	10%	12%	6%	3%
	-	-	-	-	G	-	-
Speed	6%	7%	6%	0%	3%	9%	10%
	-	-	-	-	-	-	-
Other	1%	0%	2%	4%	1%	0%	2%
	-	-	-	-	-	-	-
Don't use Canada post for admail	4%	6%	3%	3%	5%	0%	5%
	-	-	-	-	-	-	-
DK/NR	8%	7%	9%	10%	8%	6%	9%
	-	-	-	-	-	-	-
Sample size	230	103	96	31	144	30	56
Column labels	A	B	C	D	E	F	G

Not having another service option for sending parcels is the fourth most common reason for using CPC (13%). Following convenience, price (20%) and reliability (14%) round out the top three reasons business use CPC to send their parcels.

Urban businesses are less likely than businesses in suburban and urban communities to say convenience is the main reason they use CPC to send their parcels (30% versus 48% and 42%, respectively). Businesses in rural areas are more likely to say they do not have another service option (at 21%, compared to 10% for urban and 6% for suburban businesses).

Exhibit A8 – Q11. What is the main reason that you currently use Canada Post to deliver your parcels? Among those who send parcels with Canada Post. Among those who send parcels with Canada Post.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Convenience	36%	36%	38%	31%	30%	48%	42%
	-	-	-	-	-	E	E
Price	20%	22%	19%	19%	24%	17%	16%
	-	-	-	-	G	-	-
Reliability	14%	13%	13%	19%	17%	14%	10%
	-	-	-	-	-	-	-
No other service option	13%	14%	14%	8%	10%	6%	21%
	-	-	-	-	-	-	E F
Speed	4%	5%	4%	4%	5%	5%	3%
	-	-	-	-	-	-	-
Never got around to changing	3%	3%	2%	3%	4%	3%	0%
	-	-	-	-	G	-	-
Good service/customer's choice	2%	1%	2%	4%	2%	3%	1%
	-	-	-	-	-	-	-
It depends on the situation	1%	1%	1%	2%	1%	0%	2%
	-	-	-	-	-	-	-
Other	1%	1%	0%	5%	1%	0%	1%
	-	-	-	-	F	-	-
Don't use Canada post for parcels	2%	1%	3%	3%	3%	0%	0%
	-	-	-	-	F G	-	-
DK/NR	3%	3%	5%	1%	3%	4%	3%
	-	-	D	-	-	-	-
Sample size	557	246	223	88	335	61	161
Column labels	A	B	C	D	E	F	G

Respondents who use these CPC services were asked to rate how important the ability to send lettermail, admail and parcels is to the health of their business using a five-point scale (i.e., very important - 5, 4, moderately important - 3, 2, not at all important -1). The majority of businesses say that the ability to send lettermail and parcels is at least moderately important (84% for both), including a majority who say it is important (68% and 61%, respectively); however, that trend is less distinct for admail. Seven in ten businesses (69%) say the ability to send admail through CPC is at least moderately important to their business.

Just as larger businesses (those with 20 employees or more) are more likely to send larger volumes of mail than smaller businesses, they are also more likely to say that this service provided to them by CPC is important to the health of their business (74% for 20-99 employees and 79% of 100+ employees, compared to 58% for under 20 employees).

Exhibit A9 – Q12. How important is the ability to send the following through Canada Post to the health of your business? Among those who send lettermail/admail/parcels with Canada Post.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Lettermail (n=1102)							
Important (4-5)	68%	58%	74%	79%	67%	65%	69%
	-	-	B	B	-	-	-
Moderately important (3)	16%	19%	14%	12%	15%	18%	17%
	-	-	-	-	-	-	-
Not important (1-2)	16%	23%	12%	8%	18%	17%	13%
	-	C D	-	-	-	-	-
DK/NR	0%	0%	0%	1%	0%	0%	0%
	-	-	-	-	-	-	-
Admail (n=250)							
Important (4-5)	42%	41%	42%	44%	38%	51%	47%
	-	-	-	-	-	-	-
Moderately important (3)	27%	26%	28%	27%	28%	21%	28%
	-	-	-	-	-	-	-
Not important (1-2)	26%	26%	25%	24%	28%	23%	20%
	-	-	-	-	-	-	-
DK/NR	5%	6%	5%	4%	5%	6%	5%
	-	-	-	-	-	-	-
Parcel (n=566)							
Important (4-5)	61%	62%	57%	65%	62%	53%	61%
	-	-	-	-	-	-	-
Moderately important (3)	23%	20%	25%	26%	21%	33%	23%
	-	-	-	-	-	-	-
Not important (1-2)	14%	17%	13%	9%	15%	11%	14%
	-	-	-	-	-	-	-
DK/NR	2%	1%	4%	0%	2%	3%	2%
	-	-	B D	-	-	-	-
Column labels	A	B	C	D	E	F	G

Compared to 2016, businesses who send parcels with CPC are more likely to say that service is important to the health of their business (61% versus 55%). On the other hand, fewer businesses say the same of admail (42% in 2022 say it is important compared to 53% in 2016). The number of businesses who say that sending lettermail with CPC is important to the health of their business has not changed.

Exhibit A10 – Q12. How important is the ability to send the following through Canada Post to the health of your business? Among those who send lettermail/admail/parcels with Canada Post. Percent important.

Column %	Total 2022	Total 2016
Lettermail (n=1102)	68%	68%
	-	-
Admail (n=250)	42%	53%
	-	A
Parcel (n=566)	61%	55%
	B	-
Column labels	A	B

Respondents were also asked to rate how important it is to receive lettermail or parcels via CPC. Even more so than sending lettermail, receiving lettermail via CPC is considered important to the health of the vast majority of Canadian businesses (at 81%). The same number of businesses (61%) say that receiving parcels via CPC is important as is the ability to send them.

As with sending lettermail, larger businesses are more likely to say that receiving lettermail via CPC is important to the health of their business. Large businesses (100 or more employees) and businesses in rural communities are more likely to think that receiving parcels via CPC is important to the health of their businesses (68% for both).

Exhibit A11 – Q13. How important is the ability to receive the following through Canada Post to the health of your business? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Lettermail							
Important (4-5)	81%	77%	84%	88%	80%	79%	86%
	-	-	B	B	-	-	E
Moderately important (3)	10%	11%	11%	6%	12%	10%	8%
	-	-	D	-	-	-	-
Not important (1-2)	8%	12%	5%	6%	9%	11%	6%
	-	C D	-	-	-	-	-
DK/NR	0%	0%	0%	0%	0%	0%	0%
	-	-	-	-	-	-	-
Parcel delivery							
Important (4-5)	60%	57%	61%	68%	60%	46%	68%
	-	-	-	B	F	-	E F
Moderately important (3)	18%	19%	17%	18%	16%	28%	18%
	-	-	-	-	-	E G	-
Not important (1-2)	20%	23%	20%	13%	23%	24%	14%
	-	D	D	-	G	G	-
DK/NR	1%	1%	1%	0%	1%	2%	0%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

According to businesses this year, the importance of receiving lettermail via CPC has increased significantly since 2016 (81% versus 73%).

Exhibit A12 – Q13. How important is the ability to receive the following through Canada Post to the health of your business? All respondents. Percent important.

Column %	Total 2022	Total 2016
Lettermail	81%	73%
	B	-
Sample size	1102	1202
Column labels	A	B

In order to investigate further the impact in switching service providers has on businesses in Canada, and therefore the level of risk to CPC, respondents were asked how easily they could find another solution for sending their lettermail, admail and parcels.

The research has determined that the ease in which businesses can find an alternative to CPC varies. While perceptions of that ease are divided when it comes to the delivery of admail and lettermail, more businesses agree that it would be easy (51%) to find an alternative for parcel delivery than not easy (23%). Approximately one quarter of businesses believe it would be easy to find an alternative to CPC to send their lettermail (25%) or admail (26%).

Businesses in urban communities are more likely than suburban or rural businesses to say that finding an alternative to CPC parcel delivery would be easy (60% versus 46% and 37%, respectively).

Exhibit A13 – Q15. How easily would it be for your business to find another solution, other than Canada Post, to do the following? Send... Among those who send lettermail/admail/parcels with Canada Post.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Lettermail (n=1102)							
Easily (4-5)	25%	25%	24%	28%	29%	24%	18%
	-	-	-	-	G	-	-
Moderately easily (3)	23%	19%	26%	25%	26%	21%	17%
	-	-	B	-	G	-	-
Not easily (1-2)	50%	52%	48%	45%	42%	54%	63%
	-	-	-	-	-	E	E
DK/NR	2%	3%	1%	3%	3%	2%	1%
	-	-	-	-	-	-	-
Admail (n=250)							
Easily (4-5)	26%	27%	21%	36%	29%	17%	23%
	-	-	-	-	-	-	-
Moderately easily (3)	24%	21%	29%	20%	24%	35%	19%
	-	-	-	-	-	-	-
Not easily (1-2)	41%	42%	43%	34%	38%	33%	52%
	-	-	-	-	-	-	-
DK/NR	9%	10%	7%	10%	9%	14%	5%
	-	-	-	-	-	-	-
Parcels (n=566)							
Easily (4-5)	51%	51%	47%	57%	60%	46%	37%
	-	-	-	-	F G	-	-
Moderately easily (3)	25%	26%	26%	21%	21%	31%	31%
	-	-	-	-	-	-	E
Not easily (1-2)	23%	21%	25%	22%	18%	22%	31%
	-	-	-	-	-	-	E
DK/NR	1%	1%	2%	0%	1%	1%	1%
	-	-	D	-	-	-	-
Column labels	A	B	C	D	E	F	G

Looking at the results from 2016, businesses were more likely at that time to say that it would be easy for them to find an alternative to CPC for delivery of their lettermail (45% versus 25%), admail (40% versus 26%) and parcels (67% versus 51%).

Exhibit A14 – Q15. How easily would it be for your business to find another solution, other than Canada Post, to do the following? Send... Among those who send lettermail/admail/parcels with Canada Post. Percent easily.

Column %	Total 2022	Total 2016
Lettermail (n=1102)	25%	45%
	-	A
Admail (n=250)	26%	40%
	-	A
Parcel (n=566)	51%	67%
	-	A
Column labels	A	B

To assess the impact of a disruption of CPC services, respondents were asked how likely they would be to return to CPC if there was a disruption of services for a period of months. If there was a disruption of parcel delivery for a period of months, the likelihood of resuming those services is mixed. One quarter (26%) of businesses say they would not be likely to return to CPC and three in ten (29%) would be moderately likely to. A plurality (44%) say they would be likely to return to CPC after such a disruption.

Large businesses (i.e., 100 employees or more) are significantly more likely to return to CPC following a disruption (56%) than businesses with 20-99 employees (41%) or fewer than 20 employees (42%).

Exhibit A15 – Q17. If there were a disruption in Canada Post delivery services for a period of months, how likely would you be to return to use of Canada Post’s services for parcel delivery after the disruption? Among those who send parcels with Canada Post.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Likely (4-5)	44%	42%	41%	56%	44%	36%	47%
	-	-	-	B C	-	-	-
Moderately likely (3)	29%	29%	31%	24%	29%	30%	28%
	-	-	-	-	-	-	-
Not likely (1-2)	26%	28%	28%	20%	27%	34%	23%
	-	-	-	-	-	-	-
DK/NR	1%	1%	1%	1%	0%	0%	2%
	-	-	-	-	-	-	-
Sample size	557	246	223	88	335	61	161
Column labels	A	B	C	D	E	F	G

More business in 2022 say they would be likely to return to CPC for parcel delivery services following a disruption of services for a period of months than in 2016 (35%).

Exhibit A16 – Q17. If there were a disruption in Canada Post delivery services for a period of months, how likely would you be to return to use of Canada Post’s services for parcel delivery after the disruption? Among those who send parcels with Canada Post.

Column %	Total 2022	Total 2016
Likely (4-5)	44%	35%
	B	-
Moderately likely (3)	29%	27%
	-	-
Not likely (1-2)	26%	35%
	-	A
DK/NR	1%	0%
	-	-
Sample size	557	505
Column labels	A	B

Key takeaways: Current CPC service and usage

- Half (48%) of businesses receive their mail to their door, while the remaining get their mail from a postal box (20%), a community mailbox (13%) or a centralized box (12%). Large businesses are more likely to have their mail delivered to them directly, whereas small businesses are more likely to get their mail at a community (16%) or rural mailbox (7%).
- Nearly all businesses send and receive mail (lettermail and correspondence) from CPC, and there is a positive correlation between business size and the volume of mail sent and received.
- The volume of mail sent and received by businesses via CPC has decreased since 2016.
- Half (51%) of businesses send parcels and one in five businesses (22%) send admail.
- Businesses in rural communities are more likely to receive parcels (82%) than businesses in urban (73%) and suburban (71%) areas.
- Compared to 2016, there has been an increase in the volume of parcels sent via CPC (51% versus 42%).
- Convenience is the most common reason CPC is used for all three delivery services (mail, admail and parcels). Rounding out the top four for each are having no other service option, price, and reliability. Price is the main reason for one in five businesses (20%) who send parcels with CPC, which is higher than for mail and admail.
- The majority of businesses say that the ability to send lettermail and parcels is at least moderately important (84% for both), including a majority who say it is important (68% and 61%, respectively); however, that trend is less distinct for admail (69% say it is at least moderately important).
- Just as larger businesses (those with 20 employees or more) are more likely to send greater volumes of mail than small businesses, they are also more likely to deem this service important to the health of their business.

- Sending parcels is considered more important now than in 2016 (61% versus 55%), whereas admail is considered important by fewer businesses now (42% versus 53%).
- Receiving both lettermail (81%) and parcels (60%) are considered important by the majority of businesses. Compared to 2016, lettermail is important to more business now than in 2016 (when it was considered important by 73% of businesses).
- Half of businesses say that finding a replacement for delivery of lettermail and admail would be at least moderately easy (48% and 50%, respectively), whereas three quarters of businesses (76%) believe the same of parcels; however, there are fewer businesses who would find switching easy now compared to 2016. Urban businesses are more likely to believe they could easily find a replacement to CPC for parcel delivery.

Section B: Convenient access to postal services

In order to determine whether and which businesses access their local post office to make purchases, respondents were asked to provide their frequency of post office visits. Nearly half (45%) of Canadian businesses do go to the post office to make a purchase a small number of times per year (between monthly and a few times per year), whereas 11% go at least weekly. Almost one in five (17%) never do.

Large businesses are significantly more likely to go to the post office daily (8%) than businesses with 20-99 employees (2%), and directionally more than small businesses (4%).

Businesses in rural communities are more likely to go to the post office at least weekly (23%), compared to businesses in urban (6%) and suburban areas (9%).

Exhibit B1 – Q14. How often do you go to the post office to make a purchase from Canada Post (for example, stamps, other supplies, delivery services)? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Daily	3%	4%	2%	8%	1%	4%	7%
	-	-	-	C	-	-	E
Weekly	8%	10%	6%	9%	5%	5%	16%
	-	-	-	-	-	-	E F
Monthly	27%	30%	24%	24%	25%	29%	31%
	-	-	-	-	-	-	-
Once or twice a year	23%	24%	23%	19%	25%	20%	19%
	-	-	-	-	G	-	-
A few times a year	22%	21%	24%	14%	22%	24%	19%
	-	D	D	-	-	-	-
Never	17%	11%	20%	25%	21%	17%	8%
	-	-	B	B	G	G	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

The majority (63%) of businesses are located within 2.5 km of a post office and 12% are 5 km or further. Businesses in rural communities are more likely to be located 5 to 15 km from their nearest post office (17%) than urban businesses (7%).

Exhibit B2 – Q6. How far from your business is the nearest post office? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
2.5 km or less	63%	66%	60%	62%	64%	60%	61%
	-						
More than 2.5 km, but less than 5 km	21%	18%	23%	21%	22%	21%	17%
	-						
Between 5 and 15 km	11%	11%	11%	9%	7%	12%	17%
	-						E
More than 15 km	1%	2%	0%	2%	0%	2%	3%
	-						E
DK/NR	4%	3%	5%	5%	6%	5%	1%
	-				G	G	
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

While the majority (63%) of businesses are currently located within 2.5 km of their post office, less than half that (29%) are only willing to travel that distance. In fact, seven in ten (70%) businesses are willing to travel more than 2.5 km, and one quarter (24%) would travel between 5 km and 15 km.

Despite being more likely to visit their post office at least weekly, businesses in rural communities are more likely to be willing to travel more than 15 km to their nearest post office (9%). Additionally, one third (34%) of rural businesses say they are willing to travel between 5 and 15 km.

Exhibit B3 – Q27. What is the furthest you are willing to travel to a post office? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
2.5 km or less	29%	27%	29%	31%	32%	29%	22%
	-				G		
More than 2.5 km, but less than 5 km	41%	41%	41%	42%	45%	38%	34%
	-				G		
Between 5 km and 15 km	24%	24%	25%	23%	18%	29%	34%
	-					E	E
More than 15 km	5%	6%	5%	4%	4%	3%	9%
	-						E F
DK/NR	1%	2%	0%	1%	1%	2%	1%
	-	C					
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Key takeaways: Convenient access to postal services

- Nearly half (45%) of Canadian businesses do go to the post office to make a purchase a small number of times per year (between monthly and a few times per year), whereas 11% go at least weekly. Large businesses are significantly more likely to go to the post office daily (8%) and rural businesses are more likely to go to the post office at least weekly (23%).
- The majority (63%) of businesses are located within 2.5 km of a post office and 12% are 5 km or further. Seven in ten businesses (70%) say they are willing to travel further than 2.5 km to their nearest post office.
- Businesses in rural communities are more likely to be located 5 to 15 km from their nearest post office (17%) and accordingly are more likely to be willing to travel at least 5 km to the post office (43%).

Section C: Changes due to COVID-19

Respondents were asked what impact, if any, the COVID-19 pandemic has had to their business’s interaction with CPC and its services.

While 17% of businesses say the pandemic changed how they use CPC services, among those who say it has, the majority indicate it has decreased their use of mail delivery, for both invoices, payments and statements (63% say it has decreased) and correspondence (53% say it has decreased). A plurality of businesses mark no change in usage of CPC delivery for parcels (49%) and admail (42%).

Exhibit C1 – Q18. Has the COVID-19 pandemic changed how you use Canada Post’s services in any way? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Yes	17%	16%	17%	19%	20%	18%	10%
	-				G		
No	82%	82%	83%	79%	79%	82%	88%
	-						E
DK/NR	1%	2%	1%	1%	1%	0%	2%
	-				F		F
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Exhibit C2 – Q19. Has your use of Canada Post delivery services increased/decreased, compared to before the pandemic? Those who's service changed due to COVID-19.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Invoices, payments and statements							
Decreased	63%	60%	64%	68%	59%	73%	71%
	-	-	-	-	-	-	-
No change	24%	26%	21%	26%	27%	20%	16%
	-	-	-	-	-	-	-
Increased	10%	10%	14%	3%	11%	4%	13%
	-	-	-	-	-	-	-
DK/NR	3%	5%	1%	3%	4%	4%	0%
	-	-	-	-	-	-	-
Correspondence							
Decreased	53%	52%	55%	54%	47%	71%	65%
	-	-	-	-	-	-	-
No change	35%	34%	34%	40%	41%	22%	21%
	-	-	-	-	-	-	-
Increased	8%	10%	9%	3%	8%	4%	13%
	-	-	-	-	-	-	-
DK/NR	3%	5%	2%	3%	4%	4%	0%
	-	-	-	-	-	-	-
Addressed and unaddressed admail/bulk mail							
Decreased	33%	41%	29%	23%	32%	40%	34%
	-	-	-	-	-	-	-
No change	49%	45%	50%	60%	51%	53%	42%
	-	-	-	-	-	-	-
Increased	6%	10%	5%	0%	6%	0%	11%
	-	-	-	-	-	-	-
DK/NR	11%	5%	16%	17%	12%	7%	13%
	-	-	B	-	-	-	-
Parcels							
Decreased	32%	32%	30%	40%	33%	23%	35%
	-	-	-	-	-	-	-
No change	42%	42%	41%	47%	48%	37%	26%
	-	-	-	-	-	-	-
Increased	20%	24%	21%	7%	14%	36%	34%
	-	-	-	-	-	-	-
DK/NR	5%	2%	8%	6%	5%	4%	5%
	-	-	-	-	-	-	-
Sample size	189	82	78	29	130	26	33
Column labels	A	B	C	D	E	F	G

Section D: Satisfaction with, perceptions of and attachment to CPC

Satisfaction with CPC services is very high among businesses, both overall and for all attributes tested, and regardless of location or business size.

Nearly all businesses (91%) say they are satisfied with CPC’s services, overall. This result has improved since 2016, when 83% of businesses said they were satisfied. It is noteworthy that there are not fewer dissatisfied businesses, but rather fewer that are unable to provide a rating (0% versus 6%).

Exhibit D1 – Q20. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post’s services? Overall, how satisfied are you with the services offered by Canada Post? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Satisfied	91%	89%	92%	91%	91%	93%	91%
	-	-	-	-	-	-	-
Neither	5%	6%	4%	4%	5%	5%	5%
	-	-	-	-	-	-	-
Dissatisfied	4%	5%	3%	4%	4%	2%	4%
	-	-	-	-	-	-	-
DK/NR	0%	0%	0%	0%	0%	0%	1%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Exhibit D2 – Q20. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post’s services? Overall, how satisfied are you with the services offered by Canada Post? All respondents.

Column %	Total 2022	Total 2016
Satisfied	91%	83%
	B	-
Neither	5%	4%
	-	-
Dissatisfied	4%	6%
	-	-
DK/NR	0%	6%
	-	A
Sample size	1102	1202
Column labels	A	B

As mentioned, the majority of businesses are satisfied with all the facets of CPC’s services tested. Specifically, satisfaction ratings are as follows:

- Frequency of delivery or mail: 91%
- Where they get their mail: 90%
- Speed of delivery of mail: 82%
- Delivery of parcels: 77%

Large businesses are significantly more likely to be satisfied with the speed of the delivery of their mail (92%) than smaller businesses. While not significant due to the sample size, businesses in suburban communities are directionally more likely to be satisfied with CPC’s speed as well.

Exhibit D3 – Q20. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post’s services? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
The frequency of delivery of your mail (n=528)							
Satisfied	91%	91%	93%	84%	92%	90%	89%
	-	-	-	-	-	-	-
Neither	4%	4%	2%	6%	2%	6%	5%
	-	-	-	-	-	-	-
Dissatisfied	5%	4%	5%	7%	5%	4%	5%
	-	-	-	-	-	-	-
DK/NR	1%	0%	0%	2%	0%	0%	1%
	-	-	-	-	-	-	-
Where you get your mail, such as at your door or community mailbox							
Satisfied	90%	89%	89%	92%	91%	85%	89%
	-	-	-	-	-	-	-
Neither	5%	5%	5%	4%	4%	10%	5%
	-	-	-	-	-	E	-
Dissatisfied	5%	5%	5%	4%	5%	5%	5%
	-	-	-	-	-	-	-
DK/NR	0%	0%	1%	0%	0%	0%	1%
	-	-	-	-	-	-	-
The speed of delivery of your mail (n=574)							
Satisfied	82%	80%	80%	92%	82%	88%	79%
	-	-	-	B C	-	-	-
Neither	7%	7%	8%	6%	7%	7%	7%
	-	-	-	-	-	-	-
Dissatisfied	10%	13%	11%	2%	11%	4%	13%
	-	D	D	-	F	-	F
DK/NR	1%	0%	1%	0%	1%	0%	1%
	-	-	-	-	-	-	-

The delivery of parcels by Canada Post							
Satisfied	77%	77%	76%	81%	78%	72%	77%
	-	-	-	-	-	-	-
Neither	9%	8%	12%	7%	9%	17%	7%
	-	-	-	-	-	E G	-
Dissatisfied	7%	8%	5%	8%	6%	4%	10%
	-	-	-	-	-	-	F
DK/NR	7%	7%	7%	5%	7%	7%	5%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Satisfaction levels of the speed of mail delivery has not changed since 2016, while satisfaction with CPC’s parcel delivery has decreased (77% in 2022 and 86% in 2016).

Exhibit D4 – Q20. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post’s services? All respondents. Percent satisfied.

Column %	Total 2022	Total 2016
The speed of delivery of your mail (n=574)	82%	82%
	-	-
The delivery of parcels by Canada Post	77%	86%
	-	A
Sample size	1102	1202
Column labels	A	B

In terms of value for money, CPC performs exceptionally well in terms of its lettermail delivery services (with 86% of businesses saying the value for money is very good). Eight in ten (79%) of businesses also agree that CPC provides very good value for its parcel delivery. Admail delivery is rated slightly lower, with seven in ten businesses (72%) agreeing that CPC provides very good value for money for this service.

Small businesses are less likely to agree that CPC provides very good value for money for its lettermail delivery (82% compared to 89% for businesses with 20-99 employees and 92% for businesses with 100 employees or more).

Exhibit D5 – Q21. To what extent do you agree or disagree with the following statements? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Canada Post provides very good value for money for its letter mail delivery services							
Agree	86%	82%	89%	92%	87%	86%	84%
	-	-	B	B	-	-	-
Neither	6%	7%	5%	5%	5%	9%	8%
	-	-	-	-	-	-	-
Disagree	7%	10%	6%	3%	8%	3%	8%
	-	C D	-	-	F	-	F
DK/NR	1%	1%	0%	1%	0%	2%	1%
	-	-	-	-	-	-	-
Canada Post provides very good value for money for its parcel delivery services (n=566)							
Agree	79%	75%	80%	88%	80%	72%	79%
	-	-	-	B	-	-	-
Neither	7%	7%	9%	3%	6%	17%	6%
	-	-	D	-	-	E	-
Disagree	11%	15%	8%	8%	11%	5%	14%
	-	C	-	-	-	-	F
DK/NR	3%	3%	4%	1%	3%	7%	1%
	-	-	-	-	-	-	-
Canada Post provides very good value for money for its admail delivery services (n=250)							
Agree	72%	72%	71%	74%	71%	63%	78%
	-	-	-	-	-	-	-
Neither	13%	11%	16%	13%	11%	21%	14%
	-	-	-	-	-	-	-
Disagree	6%	9%	4%	3%	7%	3%	5%
	-	-	-	-	-	-	-
DK/NR	9%	9%	10%	9%	11%	13%	3%
	-	-	-	-	G	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

There is near consensus (94%) that CPC continues to be an important and essential service for Canadian business, and the vast majority (86%) agree that it does not matter if a post office is in a pharmacy/grocery store so long as the prices and services are the same. One third (32%) of businesses agree that if it took twice as long for mail to reach them, they probably would not notice.

Exhibit D6 – Q21. To what extent do you agree or disagree with the following statements? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Canada Post continues to be an important and essential service for Canadian business							
Agree	94%	92%	95%	97%	94%	91%	94%
	-	-	-	B	-	-	-
Neither	3%	5%	2%	2%	3%	2%	3%
	-	C	-	-	-	-	-
Disagree	3%	3%	3%	1%	3%	4%	3%
	-	-	-	-	-	-	-
DK/NR	0%	1%	0%	0%	0%	2%	0%
	-	-	-	-	-	-	-
It does not matter if a post office is in a pharmacy or grocery store or if it is operated by Canada Post if the prices and services are the same							
Agree	86%	84%	88%	88%	88%	86%	83%
	-	-	-	-	-	-	-
Neither	5%	5%	5%	3%	3%	10%	6%
	-	-	-	-	-	E	-
Disagree	7%	9%	6%	9%	7%	3%	10%
	-	-	-	-	F	-	F
DK/NR	2%	3%	1%	0%	2%	2%	2%
	-	C D	-	-	-	-	-
If letter mail took twice as long to reach us, we probably would not notice							
Agree	32%	33%	30%	34%	35%	31%	27%
	-	-	-	-	G	-	-
Neither	3%	3%	4%	3%	2%	4%	6%
	-	-	-	-	-	-	E
Disagree	64%	63%	65%	63%	62%	65%	66%
	-	-	-	-	-	-	-
DK/NR	1%	1%	1%	1%	1%	0%	1%
	-	-	-	-	F	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Key takeaways: Satisfaction with, perceptions of and attachment to CPC

- Nearly all businesses (91%) say they are satisfied with CPC's services, overall. This result has improved since 2016, when 83% of businesses said they were satisfied.
- Satisfaction with the various facets of CPC's service is high, ranging from 91% for the frequency of mail delivery to 77% for parcel delivery. Furthermore, 90% of businesses are satisfied with where they get their mail and 82% with the speed of their mail delivery.
- Large businesses are significantly more likely to be satisfied with the speed of the delivery of their mail (92%) than smaller businesses.
- In terms of value for money, CPC performs exceptionally well in terms of its lettermail delivery services (with 86% of businesses saying the value for money is very good) and for its parcel and admail delivery (79% and 72%, respectively).
- Small businesses are less likely to agree that CPC provides very good value for money for its lettermail delivery (82%).
- Most businesses believe that CPC continues to be an important and essential service for Canadian business (94%) and that it does not matter if a post office is in a pharmacy/grocery store so long as the prices and services are the same (86%). However, significantly fewer, one third (32%) of businesses, agree that if it took twice as long for mail to reach them, they probably would not notice.

Section E: CPC’s financial realities and support for different measures

Respondents were asked to rate how much they agree or disagree with two contradictory statements, using a four-point scale (i.e., strongly agree, somewhat agree, somewhat disagree, strongly disagree).

Over three quarters (77%) of businesses believe that CPC should receive government funding to maintain their current service offerings; however, 56% believe that CPC should only provide the level of service of which their revenue can support.

Large businesses are more likely to agree that CPC should receive federal government funding to maintain their current services (84%), compared to businesses with 20-99 employees and businesses with fewer than 20 employees (76% for both).

Businesses in suburban communities are more likely to agree that CPC should provide only the level of service it can pay for with its own revenue (66% versus 55% for both urban and rural businesses).

Those differences aside, businesses of all size and in all community types are more likely to agree that CPC should receive federal funding to maintain their services than to think that the CPC services should match its revenue.

Exhibit E1 – Q23. To what extent do you agree or disagree with the following statements: Canada Post should... All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Receive federal government funding to maintain current service levels and prices across the country							
Agree	77%	76%	76%	84%	77%	71%	80%
	-	-	-	B C	-	-	-
Disagree	19%	21%	20%	14%	18%	26%	19%
	-	-	-	-	-	-	-
DK/NR	3%	3%	4%	2%	4%	3%	2%
	-	-	-	-	G	-	-
Provide only the level of service it can pay for with its own revenue							
Agree	56%	58%	55%	56%	55%	66%	55%
	-	-	-	-	-	E G	-
Disagree	40%	39%	41%	40%	41%	31%	42%
	-	-	-	-	F	-	F
DK/NR	4%	3%	5%	3%	4%	3%	3%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Furthermore, among those who agreed or disagreed with both statements in the previous exhibit (Exhibit E1), the majority (72%) of businesses believe more strongly that CPC should receive funding to maintain their services.

Exhibit E2 – Q24. Of the following statements, which one most closely reflects your opinion? Those with paradoxical opinions in Q23.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Canada Post should provide only the level of service it can pay for with its own revenue	28%	31%	29%	20%	26%	28%	34%
	-	-	-	-	-	-	-
Canada Post should receive federal government funding to maintain current service levels and prices across the country	72%	69%	71%	80%	74%	72%	66%
	-	-	-	-	-	-	-
Sample size	463	215	185	63	279	67	117
Column labels	A	B	C	D	E	F	G

Respondents were asked to rate how much they support or oppose a variety of potential measures CPC could take to reduce their financial losses using a four-point scale (i.e., strongly support, somewhat support, somewhat oppose, strongly oppose).

Support for measures to reduce CPC’s losses varies. Most businesses support government subsidies (78%), replacing corporate owned post offices with franchises (74%), installing outdoor/automated parcel lockers (69%), and ending door-to-door home delivery (67%). Support is lower for reducing the frequency of delivery (51%) and there is more opposition than support for reducing number or post offices (36% support and 60% oppose) and increasing the price of stamps (42% support and 57% oppose).

Large businesses (100 employees or more) are less likely to oppose replacing corporate owned post offices with less expensive franchises (14%), compared to smaller businesses (23%).

Businesses in rural communities are less likely to support replacing corporate owned post offices (64% versus 78% urban and 82% suburban), reducing the frequency of mail delivery (44% versus 54% urban and 55% suburban), or reducing the number of post offices (25% versus 40% urban and 44% suburban).

Exhibit E3 – Q25. To what extent would you support or oppose the following changes? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
The Government of Canada to directly subsidize more costly and unprofitable postal services in rural and remote communities							
Support	78%	79%	77%	74%	79%	76%	75%
	-	-	-	-	-	-	-
Oppose	18%	17%	18%	24%	16%	19%	23%
	-	-	-	-	-	-	E
DK/NR	4%	4%	5%	3%	5%	5%	2%
	-	-	-	-	G	-	-

Replace corporate owned post offices with less expensive franchises in grocery stores or pharmacies							
Support	74%	73%	74%	80%	78%	82%	64%
	-	-	-	-	G	G	-
Oppose	22%	23%	23%	14%	18%	15%	33%
	-	D	D	-	-	-	E F
DK/NR	4%	4%	3%	6%	5%	3%	3%
	-	-	-	-	-	-	-
Install outdoor and automated 24/7 parcel lockers							
Support	69%	66%	71%	73%	70%	75%	65%
	-	-	-	-	-	-	-
Oppose	27%	28%	27%	24%	25%	21%	33%
	-	-	-	-	-	-	E F
DK/NR	4%	6%	2%	4%	5%	4%	2%
	-	C	-	-	G	-	-
End door-to-door home delivery and replace it with community mailboxes							
Support	66%	65%	68%	65%	63%	68%	72%
	-	-	-	-	-	-	E
Oppose	31%	33%	29%	33%	34%	28%	26%
	-	-	-	-	G	-	-
DK/NR	3%	3%	3%	3%	3%	4%	2%
	-	-	-	-	-	-	-
Reduce the frequency of mail delivery from five days a week to every other day							
Support	51%	54%	51%	42%	54%	55%	44%
	-	D	-	-	G	G	-
Oppose	47%	43%	48%	56%	43%	44%	55%
	-	-	-	B	-	-	E
DK/NR	2%	3%	1%	2%	2%	1%	2%
	-	C	-	-	-	-	-
Increase the basic price of a stamp by roughly 25%							
Support	41%	43%	40%	41%	43%	35%	40%
	-	-	-	-	-	-	-
Oppose	57%	56%	59%	57%	55%	64%	59%
	-	-	-	-	-	-	-
DK/NR	1%	1%	1%	2%	1%	1%	1%
	-	-	-	-	-	-	-

Reduce the number of post offices							
Support	36%	32%	41%	34%	40%	44%	25%
	-	-	B	-	G	G	-
Oppose	61%	64%	57%	63%	56%	54%	74%
	-	C	-	-	-	-	E F
DK/NR	3%	4%	2%	2%	4%	3%	2%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Furthermore, respondents were asked to rate how much they agree or disagree with two potential changes to CPC services using a four-point scale (i.e., strongly agree, somewhat agree, somewhat disagree, strongly disagree).

Approximately half of businesses agree that CPC should be allowed to deliver less frequently to reduce costs (57%) or that Canadians should shoulder the same cost for parcel delivery regardless the distance (52%).

Businesses in rural communities are more likely to disagree that CPC should be allowed to reduce their lettermail delivery frequency (51%), compared to businesses in urban (38%) or suburban (38%) communities.

Exhibit E4 – Q26. Do you agree or disagree with the following statements relating to Canada Post Services? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Canada Post should be allowed to deliver letters less frequently than five days a week to reduce costs							
Agree	57%	63%	52%	54%	60%	60%	49%
	-	C	-	-	G	-	-
Disagree	42%	36%	47%	44%	38%	39%	51%
	-	-	B	-	-	-	E F
DK/NR	1%	1%	1%	2%	1%	2%	0%
	-	-	-	-	G	-	-
All Canadians should shoulder the same cost (that is, rate) for parcel delivery, regardless of the distance							
Agree	52%	54%	49%	54%	51%	47%	56%
	-	-	-	-	-	-	-
Disagree	46%	44%	49%	44%	47%	52%	41%
	-	-	-	-	-	G	-
DK/NR	2%	3%	2%	2%	2%	1%	2%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Respondents were asked how likely they would be to use other services through CPC using a five-point scale (i.e., very likely - 5, 4, moderately likely - 3, 2, not likely -1). Most businesses (76%) are not likely to become a client of CPC banking service, however fewer (50%) are not likely to access other government services at their local post office.

Small businesses (under 20 employees) are more likely to use both the other government services (24%) and banking services (10%), compared to businesses with 20-99 employees (16% and 6%, respectively) and 100 or more employees (13% and 3%, respectively).

Exhibit E5 – Q16. How likely would your business use the following services if they were offered at your local post office? All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Access other government services							
Likely (4-5)	19%	24%	16%	13%	19%	21%	18%
	-	C D	-	-	-	-	-
Moderately likely (3)	26%	28%	25%	25%	25%	26%	29%
	-	-	-	-	-	-	-
Not likely (1-2)	50%	44%	55%	53%	50%	49%	49%
	-	-	B	-	-	-	-
DK/NR	5%	3%	5%	9%	5%	4%	4%
	-	-	-	B	-	-	-
Become a client of Canada Post banking services							
Likely (4-5)	7%	10%	6%	3%	8%	6%	6%
	-	C D	-	-	-	-	-
Moderately likely (3)	11%	12%	11%	10%	11%	13%	13%
	-	-	-	-	-	-	-
Not likely (1-2)	76%	74%	78%	75%	76%	76%	77%
	-	-	-	-	-	-	-
DK/NR	5%	4%	5%	12%	6%	6%	5%
	-	-	-	B C	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Key takeaways: CPC's financial realities and support for different measures

- Three quarters (77%) of businesses believe that CPC should receive government funding to maintain their current service offerings and 56% believe that CPC should only provide the level of service of which their revenue can support.
- Among businesses who hold a paradoxical viewpoint (both agree or disagree with the aforementioned statements), when presented with a forced choice, the majority (72%) believe that CPC should receive federal government funding to maintain their current service level.
- While there are some differences in the intensity of level of agreement across business size and community type, all businesses are more likely to agree that CPC should receive federal funding to maintain their services than to think that the CPC services should align to its revenue.
- Support for measures to reduce CPC's losses varies, as follows:
 - Most businesses support government subsidies (78%), replacing corporate owned post offices with franchises (74%), installing outdoor/automated parcel lockers (69%), and ending door-to-door home delivery (67%).
 - Support is lower for reducing the frequency of delivery (51%) and there is more opposition than support for reducing number or post offices (36% support and 60% oppose) and increasing the price of stamps (42% support and 57% oppose).
- Approximately half of businesses agree that CPC should be allowed to deliver less frequently to reduce costs (57%) or that Canadians should shoulder the same cost for parcel delivery regardless the distance (52%).
- The majority of businesses are not likely to access other government services at the post office or become a client of Canada Post banking services, however, small businesses are more likely to use both (other government services: 24% and banking services: 10%).

Section F: Challenges and services in rural and remote areas

In order to understand the unique perceptions and challenge of businesses in rural Canada, a series of questions were drafted and implemented in this research.

All respondents were asked how much they agree or disagree with a series of questions about the Rural Moratorium using a four-point scale (i.e., strongly agree, somewhat agree, somewhat disagree, strongly disagree). Prior to answering the questions, respondents were read a brief description of the Rural Moratorium and its inadequacy.

While businesses mostly agree with amending (88%) or modifying (80%) the Rural Moratorium, more businesses disagree with ending it (57%) than agree (40%).

Rural businesses are more likely to disagree with both modifying (28%) and ending (62%) the Rural Moratorium than businesses in urban (14% and 56%, respectively) and suburban (14% and 49%, respectively) communities.

Exhibit F1 – Q28. Do you agree or disagree with the following statements: The moratorium should...
All respondents.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Continue, but the list of locations protected from closure and franchising should be updated so it reflects areas that are truly rural							
Agree	88%	86%	89%	90%	88%	84%	90%
	-	-	-	-	-	-	-
Disagree	9%	10%	7%	8%	9%	12%	7%
	-	-	-	-	-	-	-
DK/NR	4%	4%	4%	1%	4%	4%	3%
	-	-	-	-	-	-	-
Be modified to allow rural post offices to be replaced with franchises in grocery stores and pharmacies							
Agree	80%	80%	80%	78%	84%	84%	71%
	-	-	-	-	G	G	-
Disagree	18%	18%	17%	21%	14%	14%	28%
	-	-	-	-	-	-	E F
DK/NR	2%	2%	3%	1%	3%	2%	2%
	-	-	-	-	-	-	-
End and Canada Post should be allowed to close underused post offices, even if they are in rural areas							
Agree	40%	39%	41%	42%	41%	46%	36%
	-	-	-	-	-	-	-
Disagree	57%	58%	55%	57%	56%	49%	62%
	-	-	-	-	-	-	F
DK/NR	3%	2%	4%	1%	3%	5%	2%
	-	-	-	-	-	-	-
Sample size	1102	477	475	150	679	142	281
Column labels	A	B	C	D	E	F	G

Respondents from businesses in rural communities were asked to rate a list of potential challenges using a five-point scale (i.e., a very significant challenge - 5, 4, a moderate challenge - 3, 2, no challenge at all - 1).

Among the challenges tested, the cost of shipping parcels provides the most significant challenge for rural business (16%). The vast majority say that the distance to and location of their post office is no challenge at all (81% and 85%, respectively). Between six and seven in ten businesses say that parcel delivery times (63%), mail delivery times (67%) and post office hours of operation (71%) are not a challenge for them.

Exhibit F2 – Q22. As a business located in a rural area, how much of a challenge do each of the following pose when accessing Canada Post services? Businesses in rural Canada.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
The cost of shipping parcels							
Significant challenge (4-5)	16%	17%	14%	17%	-	-	16%
	-	-	-	-	-	-	-
A moderate challenge (3)	31%	31%	30%	35%	-	-	31%
	-	-	-	-	-	-	-
Not a challenge (1-2)	47%	47%	49%	43%	-	-	47%
	-	-	-	-	-	-	-
DK/NR	6%	5%	8%	6%	-	-	6%
	-	-	-	-	-	-	-
Delivery times for parcels							
Significant challenge (4-5)	13%	10%	15%	22%	-	-	13%
	-	-	-	-	-	-	-
A moderate challenge (3)	18%	17%	24%	7%	-	-	18%
	-	-	-	-	-	-	-
Not a challenge (1-2)	63%	69%	55%	67%	-	-	63%
	-	C	-	-	-	-	-
DK/NR	5%	5%	7%	3%	-	-	5%
	-	-	-	-	-	-	-
The hours of operation of your post office							
Significant challenge (4-5)	13%	16%	9%	11%	-	-	13%
	-	-	-	-	-	-	-
A moderate challenge (3)	16%	12%	18%	25%	-	-	16%
	-	-	-	-	-	-	-
Not a challenge (1-2)	71%	72%	71%	64%	-	-	71%
	-	-	-	-	-	-	-
DK/NR	1%	0%	2%	0%	-	-	1%
	-	-	-	-	-	-	-
Delivery times for mail							
Significant challenge (4-5)	9%	6%	12%	14%	-	-	9%
	-	-	-	-	-	-	-
A moderate challenge (3)	23%	20%	29%	18%	-	-	23%
	-	-	-	-	-	-	-
Not a challenge (1-2)	67%	74%	59%	66%	-	-	67%
	-	C	-	-	-	-	-
DK/NR	0%	0%	0%	2%	-	-	0%
	-	-	-	-	-	-	-
Where your post office is located relative other services							

Significant challenge (4-5)	8%	6%	11%	7%	-	-	8%
	-	-	-	-	-	-	-
A moderate challenge (3)	10%	8%	12%	12%	-	-	10%
	-	-	-	-	-	-	-
Not a challenge (1-2)	81%	85%	76%	80%	-	-	81%
	-	-	-	-	-	-	-
DK/NR	1%	1%	1%	0%	-	-	1%
	-	-	-	-	-	-	-
The distance to your post office							
Significant challenge (4-5)	8%	8%	7%	7%	-	-	8%
	-	-	-	-	-	-	-
A moderate challenge (3)	8%	8%	8%	6%	-	-	8%
	-	-	-	-	-	-	-
Not a challenge (1-2)	85%	84%	84%	87%	-	-	85%
	-	-	-	-	-	-	-
DK/NR	0%	0%	0%	0%	-	-	0%
	-	-	-	-	-	-	-
Sample size	281	134	115	32	0	0	281
Column labels	A	B	C	D	E	F	G

Respondents from businesses in rural communities were asked to rate how much they support or oppose a variety of potential measures CPC could take to changes their service offering in rural communities using a four-point scale (i.e., strongly support, somewhat support, somewhat oppose, strongly oppose).

Most rural businesses would support access to government services in their post offices (82%) and the creation of “service hubs” (81%). The majority would support combining small post offices (71%) and providing access to financial services in post offices (68%). Support is lower for extending post office hours (56%) or increasing the number of post offices (40%).

Exhibit F3 – Q29. Do you support or oppose Canada Post doing the following to better reach rural and remote areas? Businesses in rural Canada.

Column %	Total 2022	Business Size			Community Type		
		<20	20-99	100+	Urban	Suburban	Rural
Providing convenient access to other government services at rural and remote post offices							
Support	82%	80%	84%	87%	-	-	82%
	-	-	-	-	-	-	-
Oppose	14%	17%	13%	10%	-	-	14%
	-	-	-	-	-	-	-
DK/NR	4%	4%	4%	3%	-	-	4%
	-	-	-	-	-	-	-
Creating service hubs within rural communities that feature a post office as well as services from local organizations or businesses							
Support	81%	79%	81%	91%	-	-	81%

	-	-	-	-	-	-	-
Oppose	14%	18%	11%	6%	-	-	14%
	-	-	-	-	-	-	-
DK/NR	4%	2%	8%	3%	-	-	4%
	-	-	-	-	-	-	-
Combining small rural post offices in the same geographic area into a single location that offers enhanced services such as automated 24/7 parcel lockers							
Support	71%	65%	76%	77%	-	-	71%
	-	-	-	-	-	-	-
Oppose	25%	31%	17%	23%	-	-	25%
	-	C	-	-	-	-	-
DK/NR	4%	4%	6%	0%	-	-	4%
	-	-	-	-	-	-	-
Providing access to financial services at post offices in rural and remote areas in light of a lack of bank branches							
Support	68%	69%	61%	92%	-	-	68%
	-	-	-	-	-	-	-
Oppose	29%	29%	36%	5%	-	-	29%
	-	-	-	-	-	-	-
DK/NR	3%	3%	3%	3%	-	-	3%
	-	-	-	-	-	-	-
Extending hours of operation at rural post office locations							
Support	54%	53%	49%	75%	-	-	54%
	-	-	-	-	-	-	-
Oppose	45%	46%	51%	21%	-	-	45%
	-	-	-	-	-	-	-
DK/NR	1%	1%	0%	3%	-	-	1%
	-	-	-	-	-	-	-
Increasing the number of rural post office locations							
Support	40%	41%	37%	46%	-	-	40%
	-	-	-	-	-	-	-
Oppose	56%	55%	60%	46%	-	-	56%
	-	-	-	-	-	-	-
DK/NR	4%	3%	3%	8%	-	-	4%
	-	-	-	-	-	-	-
Sample size	281	134	115	32	0	0	281
Column labels	A	B	C	D	E	F	G

Key takeaways: Challenges and services in rural and remote areas

- When it comes to the Rural Moratorium, most businesses agree with amending (88%) or modifying (80%) it, however the opposite is true of ending it. More businesses disagree with ending it (57%) than agree (40%).
- Rural businesses were asked about potential challenges they face that relate to CPC services. Among all the challenges tested, the cost of shipping parcels provides the most significant challenge for rural business (16% say it is a significant challenge and 31% say it is a moderate challenge). Most rural businesses do not believe that shipping and delivery currently pose a significant challenge to them.
- Most rural businesses would support access to government services in their post offices (82%) and the creation of “service hubs” (81%). The majority would support combining small post offices (71%) and providing access to financial services in post offices (68%). Despite strong support for those potential options, support is significantly lower for extending post office hours (56%) or increasing the number of post offices (40%).

Conclusions

Businesses in Canada have endured a lot of change since the last iteration of this research was undertaken in 2016, including the COVID-19 pandemic. There have been some notable shifts in Canadian businesses’ relationship to and impression of CPC.

While the volume of mail and admail sent and received appears to have decreased – though a majority of businesses do not perceive their relationship with CPC services has changed due to the pandemic – key metrics related to those services have improved. Specifically, satisfaction with CPC has increased overall, and most businesses rate all the facets of the CPC service offering testing strongly (for example, frequency, speed, where mail is delivered). Furthermore, lettermail and parcel delivery via CPC is considered to be a very good value for money for the vast majority of businesses. And nearly all businesses agree that CPC continues to be an important and essential service for Canadian business.

Since 2016, fewer businesses say that they would easily find an alternative to their mail, admail and parcel delivery. They continue to believe or feel more strongly that (in the case of sending parcels and receiving lettermail), sending and receiving mail, admail and parcels is important to the health of their business.

Despite the majority of businesses being located within 2.5 km of a post office, more are willing to travel further than a couple of kilometres. That is true across community type but is particularly true for businesses in rural communities. Which is particularly interesting given that businesses in rural communities are more likely to visit their post office to make purchases at least weekly (compared to urban and suburban businesses).

That said, the majority of businesses do not support ending the Rural Moratorium which would allow for the closure or conversion of some 3,000 corporately owned post offices into franchises. However, most businesses do agree that the Moratorium should be amended to reflect post offices that are truly rural or modifying it to allow for franchise conversion. Indeed, in and out of rural communities, there is widespread support for franchised locations, so long as service level and prices are the same as corporately owned post offices.

When it comes to reducing CPC’s financial losses, more businesses than not believe that CPC should be supported by the federal government to maintain their current service offering, in addition to directly subsidizing the more costly and less profitable postal services in rural and remote communities.

Where there are lower levels or a lack of support is in longer delivery times or reducing the frequency of mail delivery (businesses say they would notice), a disruption of shipping services (the majority of businesses would be moderately likely to return to CPC, or worse), increasing the cost of stamps, or reducing the number of post offices. That said, businesses are divided on whether Canadians should shoulder the same cost for parcel delivery, coast to coast.

Exploring possible additions to CPC’s service offering is interesting. While more businesses say they are not likely (than likely) to become a client of CPC banking services or to access other government services, the proportion of businesses who say they are likely to (that is 7% for banking and 19% for government

services) is potentially not insignificant. These new services could represent an opportunity for CPC that would be worthwhile. Rural businesses are particularly supportive of CPC providing convenient access to other government services at their post office, or the creation of service hubs that combine local organizations or businesses.

All considered, this research has revealed more positive results than negative, and potentially more opportunities than threats. It would be worthwhile to explore in more detail, through qualitative research, how businesses interact with the corporate versus franchised post office locations, why finding an alternative to CPC would be easy or difficult, and how they feel about federal government funding for CPC.

One additional area worth exploring using qualitative research is around the views of whether CPC should receive federal government funding to maintain their current services or whether CPC should only offer services that it can support through its revenue. In this report we have referred to those who either agree with both those sentiments or disagree with both those sentiments as “paradoxical.” Worth exploring is whether respondents believe conflicting views or what they are saying is “do not try to invest in some new service that will just lose money and/or they think of government funding as ‘revenue’”. Either way, it almost certainly would influence how businesses react to CPC’s financial situation and choices.

Appendix A: Survey methodology report

Survey methodology

Earnscliffe Strategy Group's overall approach for this study was to conduct a telephone survey of Canadian businesses, using Elemental's centralized call-centre and state of the art Computer Aided Telephone Interviewing (CATI) system. A detailed discussion of the approach used to complete this research is presented below.

Questionnaire design

The questionnaire for this study was designed by PSPC in consultation with Earnscliffe, drawing on previous studies, and provided for fielding to Elemental. The survey was offered to respondents in both English and French and completed based on their preferences.

Sample Design and Selection

The sampling plan for the study was designed by PSPC to ensure sufficient representation of Canadian businesses across the country.

Elemental relied on sample using lists of businesses Data Axle. The survey was completed on a random basis, in that sample was injected into the study on a randomized basis. This means the initial call on every unique contact is done in a randomized fashion.

In the end, we met the target sample sizes outlined for each segment, with exception of community type. As businesses self-identified their community (instead of using the postal codes identified by the sample list), respondents were not terminated based on community quotas to maintain productivity.

The sample was targeted to the location and size of the business, and the final data were weighted in tabulation to replicate actual distribution according to the most current Census data available.

Data Collection

The survey was conducted in English and French from April 14, 2022 to May 10, 2022. The survey was undertaken by Elemental's telephone data collection operation headquartered in Ottawa, Ontario.

Targets/Weighting

Quotas were used for the general population sample to help ensure that, prior to any additional weighting, minimum numbers of completed surveys by gender, age group and region were achieved. This quota distribution was designed to allow for subsets of the data to be analyzed. Quotas were established on region, age and gender as follows:

Segment	Population	Distribution (%)	Target quota	Actual sample size	Margin of error
Canada	1,246,454	-	1,100	1,102	+/-2.95%
Region					
Atlantic	86,112	6.9%	100	100	+/-9.9%
Quebec	256,494	20.6%	240	240	+/-6.3%
Ontario	446,020	35.8%	330	330	+/-5.4%
Prairies (Manitoba & Saskatchewan)	84,240	6.8%	100	100	+/-9.9%
Alberta	181,961	14.6%	160	161	+/-7.8%
British Columbia	191,627	15.4%	170	171	+/-7.5%
Business size (number of employees)					
Under 20	1,085,675	87.1%	475	477	+/-4.5%
20 to 49	103,477	8.3%	275	275	+/-5.9%
50-99	32,731	2.6%	200	200	+/-6.9%
100+	24,571	2%	150	150	+/-8.0%
Community type					
Urban/Suburban	1,022,092	82%	850	821	+/-3.4%
Rural	224,362	18%	250	281	+/-5.8%

The final data have been weighted to reflect the geographic distribution of businesses in Canada by province and by community type (i.e., urban or suburban, and rural).

Quality Controls

Elemental conducted a soft-launch pre-test of the survey, and Earnscliffe reviewed the data to ensure that all skip patterns were working and that all respondents were completing the survey in an appropriate amount of time. Initially, the average length of interview slightly exceeded the 20 target and a handful of respondents identified a demographic question they preferred not answering. As such, that question was removed to shorten the survey and improve the survey experience for respondents.

Results

Final dispositions

A total of 15,814 individuals were contacted to conduct the survey, of which 1,102 qualified as valid and completed the survey. The response rate for this survey was 6.7%.

Unresolved (U): 8,408

Busy, no answer, answering machine: 8,408

In-scope non-responding (IS): 7,406

Language problem: 247

Selected respondent not available:

Business refusal: 4,360

Qualified respondent break-off: 149

In-scope responding (R): 1,134

Completed interviews: 1,102

Completed interviews disqualified – refused postal code: 3

Quota filled: 29

Response rate = $R/(U+IS+R)$: 6.7%

Nonresponse

Any survey that is conducted is potentially subject to bias or error. The possibility of non-response bias exists within the current sample. In particular, this survey would not include businesses who do not have regular access to a telephone or who are not capable of responding to a survey in either English or French. In addition, some groups within the population are systemically less likely to answer surveys.

Business sample profile: unweighted versus weighted distributions

Region	Unweighted Sample	Weighted Sample
Atlantic	9%	6%
Quebec	22%	21%
Ontario	30%	37%
Manitoba/Saskatchewan	9%	7%
Alberta	15%	13%
British Columbia	16%	16%

Business size	Unweighted Sample	Weighted Sample
Under 20	43%	44%
20-49	25%	24%
50-99	18%	18%
100 or more	14%	14%

Scope of business	Unweighted Sample	Weighted Sample
Manufacturing	17%	18%
Retail trade	17%	16%
Construction	15%	14%
Not for profit (for example, Charity, NGO)	9%	9%
Other services (except public administration)	8%	8%
Professional, scientific and technical services	5%	5%
Accommodation and food services	5%	5%
Transportation and warehousing	5%	5%
Health care and social assistance	4%	4%
Wholesale trade	3%	3%
Educational services	3%	3%
Finance and insurance	2%	3%
Real estate and rental and leasing	2%	2%
Arts, entertainment and recreation	1%	1%
Information and cultural industries	1%	1%
Management of companies and enterprises	1%	1%
Administrative and support, waste management and remediation services	1%	1%
Public administration	1%	0%

Industry	Unweighted Sample	Weighted Sample
Locally (that is, your city/town)	63%	64%
Throughout your province, territory or region	61%	61%
Across Canada	43%	43%
Internationally	28%	29%

Margin of error

The margin of error for a sample of 1,102 Canadian businesses is +/-2.95% at the 95% confidence interval.

Survey duration

The telephone survey took an average of 20 minutes to complete.

Tabulated data

A full set of tabulated data has been provided under a separate cover.

Appendix B: Survey instrument

Introduction

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

Would you prefer that I continue in English or French? Préférez-vous continuer en français ou 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. The survey takes about 20 minutes.

We are looking for input from a senior member of your organization who is responsible for making decisions about the use of postal and other delivery services. Is that you?

Your participation is completely voluntary and your decision to participate or not will not affect any dealings you may have with the federal government. The information is being collected under the authority of the Privacy Act and names of participants will not be provided to the government or any other third party. The government will only receive non-identifying aggregate information. Your participation is confidential and responses are anonymous.

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 continue?

[If no: Is there a reason that prevents you from answering this survey by phone? [Offer alternate format (online questionnaire), where appropriate. If accepted, take respondent email address]

For your safety, are you currently driving?

Yes [schedule callback]

No [continue]

Don't know/refused [terminate]

Thank you, let's begin the survey.

[interviewer note: Additional background information if required]

This research is being conducted by Earncliffe Strategy Group, a Canadian public opinion research firm on behalf of the Government of Canada.

The purpose of this survey is to better understand Canadian businesses' opinions and behaviours relating to Canada Post.

- You are being asked to offer your opinions and experiences.
- We anticipate that the survey will take 20 minutes to complete.
- Your participation in the survey is completely voluntary.
- Your decision on whether or not to participate will not affect any dealings you may have with the Government of Canada or Canada Post.

What about your demographic/personal information?

- The personal/demographic information you provide is governed in accordance with the Privacy Act and is being collected in accordance with the Treasury Board Directive on Privacy Practices.
- Purpose of collection: We collect demographic information such as demographic information to better understand the topic of the research and help us analyze the results. However, your responses are always combined with the responses of others for analysis and reporting; you will never be identified.
- For more information: This personal information collection is described in the standard personal information bank Public Communications – PSU 914, in Info Source, available online at infosource.gc.ca.
- Your rights under the Privacy Act: In addition to protecting your personal information, the Privacy Act gives you the right to request access to and correction of your personal information. You also have the right to file a complaint with the Privacy Commissioner of Canada if you think your personal information has been handled improperly.

If you have any questions about the survey, you may contact Marcelyne Cross, Manager, Public Opinion Research at Public Services and Procurement Canada, marcelyne.cross@tpsgc-pwgsc.gc.ca, 343-572-5516.

Your help is greatly appreciated, and we look forward to receiving your feedback. [continue to q1]

[read to all]

Note that this survey asks about postal services used strictly for business, rather than personal use. Please respond to all the questions I have for you today from your business' perspective, and for your location or branch only.

Screening and background

[ask all]

1. For classification purposes, can you tell me in which province or territory your business is located?

Newfoundland and Labrador	1
Prince Edward Island	2
Nova Scotia	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11
Northwest Territories	12
Nunavut	13

[ask all]

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

[record response]

Prefer not to say [thank and terminate] 99

[ask all]

3. How many employees are there in your organization including those working full and part-time?
[only read categories if necessary]

1-4	1
5-9	2
10-19	3
20-49	4
50-99	5
100-499	6
500+	7
None	8

[ask all]

4. In which type of region is your organization located? Would you say it is in... [read]

A city	1
A suburb	2
A rural area	3

Current Service

[ask all]

5. How does mail get delivered to your business?

To your door	1
A centralized box in the office building	2
A community mailbox	3
A rural mailbox (side of the road)	4
A postal box (at a post office or retail outlet)	5
Don't know/no response [do not read]	99

[ask all]

6. How far from your business is the nearest post office?

2.5 km or less	1
More than 2.5 km, but less than 5 km	2
Between 5 and 15 km	3
More than 15 km	4
Don't know/no response [do not read]	99

Usage

[ask all]

7. What is the approximate volume of mail you send through Canada Post in an average month?

None	1
Under 10	2
10-24	3
25-50	4
51-100	5
101-499	6
500 or more	7
Don't know/no response [do not read]	99

- a. Invoices, payments and statements
- b. Correspondence
- c. Addressed and unaddressed admail or bulk mail (for example, promotional materials, greeting cards, newsletters, flyers)
- d. Parcels

[ask all]

8. What is the approximate volume of the mail you receive through Canada Post in an average month?

None	1
Under 10	2
10-24	3
25-50	4
51-100	5
101-499	6
500 or more	7
Don't know/no response [do not read]	99

- a. Invoices, payments and statements
- b. Correspondence
- c. Addressed and unaddressed admail or bulk mail (for example, promotional materials, greeting cards, newsletters, flyers)
- d. Parcels

[randomize order of q9, q10 and q11]

[ask if q7a or b is >1 and <99]

9. What is the main reason that you currently use Canada Post to deliver your mail? [randomize; read list]

Never got around to changing	1
Price	2
Speed	3
Reliability	4
No other service option	5
Convenience	6
Other [specify]	77
Don't know/no response [do not read]	99

[ask if q7c is >1 and <99]

10. What is the main reason that you currently use Canada Post to deliver your admail? [randomize; read list]

Never got around to changing	1
Price	2
Speed	3
Reliability	4
No other service option	5
Convenience	6
Other [specify]	77
Don't know/no response [do not read]	99

[ask if q7d is >1 and <99]

11. What is the main reason that you currently use Canada Post to deliver your parcels?
[randomize; read list]

Never got around to changing	1
Price	2
Speed	3
Reliability	4
No other service option	5
Convenience	6
Other [specify]	77
Don't know/no response [do not read]	99

[ask all]

12. How important is the ability to send the following through Canada Post to the health of your business? [read scale]

Very important - 5	
4	
Moderately important - 3	
2	
Not important - 1	
Don't know/no response [do not read]	99

- a. Letter mail (including payments and invoices)
- b. Admail (including addressed and unaddressed)
- c. Parcel delivery

[ask all]

13. How important is the ability to receive the following through Canada Post to the health of your business? [read scale]

Very important - 5	
4	
Moderately important - 3	
2	
Not important - 1	
Don't know/no response [do not read]	99

- a. Letter mail (including payments and invoices)
- b. Parcel delivery

[ask all]

14. How often do you go to the post office to make a purchase from Canada Post (for example, stamps, other supplies, delivery services)? [read list]

Daily	1
Weekly	2
Monthly	3
Once or twice a year	4
A few times a year	5
Never	6

[ask all]

15. How easily would it be for your business to find another solution, other than Canada Post, to do the following? [read scale]

Very easily - 5	
4	
Moderately easily - 3	
2	
Not easily - 1	
Don't know/no response [do not read]	99

- a. Send lettermail
- b. Send admail
- c. Send parcels

[ask all]

16. How likely would your business use the following services if they were offered at your local post office? [randomize; read scale]

Very likely - 5	
4	
Moderately likely - 3	
2	
Not likely - 1	
Don't know/no response [do not read]	99

- a. Become a client of Canada Post banking services
- b. Access other government services

[ask if q7d is >1 and <99]

17. If there were a disruption in Canada Post delivery services for a period of months, how likely would you be to return to use of Canada Post's services for parcel delivery after the disruption?

Very likely - 5	
4	
Moderately likely - 3	
2	
Not likely - 1	
Don't know/no response [do not read]	99

Changes due to COVID-19

[ask all]

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

Yes	1
No	2
Don’t know/no response [do not read]	99

[ask if q18=1]

19. For each of the following, to what extent, if at all, has your use of Canada Post delivery services increased or decreased, compared to before the pandemic? [read scale]

Decreased significantly	1
Decreased moderately	2
No change	3
Increased moderately	4
Increased significantly	5
Don’t know/no response [do not read]	99

- a. Invoices, payments and statements
- b. Correspondence
- c. Addressed and unaddressed admail/bulk mail (for example, promotional materials, greetings cards, news letter, flyers)
- d. Parcels

Satisfaction with Canada Post Services

[ask all]

20. To what extent are you satisfied or dissatisfied with the following aspects of Canada Post’s services? [read scale]

Very satisfied	1
Somewhat satisfied	2
Neither satisfied nor dissatisfied	3
Somewhat dissatisfied	4
Very dissatisfied	5
Don’t know/no response [do not read]	99

- a. Where you get your mail, such as at your door or community mailbox
- b. [split sample; half of respondents] The speed of delivery of your mail
- c. [split sample; half of respondents] The frequency of delivery of your mail
- d. The delivery of parcels by Canada Post
- e. Overall, how satisfied are you with the services offered by Canada Post?

Perceptions and attachment

[ask all]

21. To what extent do you agree or disagree with the following statements? [randomize; read scale]

- | | |
|--------------------------------------|----|
| Strongly agree | 1 |
| Somewhat agree | 2 |
| Neither | 3 |
| Somewhat disagree | 4 |
| Strongly disagree | 5 |
| Don't know/no response [do not read] | 99 |
-
- a. Canada Post provides very good value for money for its parcel delivery services
 - b. Canada Post provides very good value for money for its letter mail delivery services
 - c. Canada Post provides very good value for money for its admail delivery services
 - d. If letter mail took twice as long to reach us, we probably would not notice
 - e. It does not matter if a post office is in a pharmacy or grocery store or if it is operated by Canada Post if the prices and services are the same
 - f. Canada Post continues to be an important and essential service for Canadian business

Challenges in rural and remote areas

[only ask of businesses in rural areas as identified in q4]

[ask if q4=3]

22. As a business located in a rural area, how much of a challenge do each of the following pose when accessing Canada Post services? [randomize; read scale]

- | | |
|--------------------------------------|----|
| No challenge at all - 1 | |
| 2 | |
| A moderate challenge - 3 | |
| 4 | |
| A very significant challenge - 5 | |
| Don't know/no response [do not read] | 99 |
-
- a. The distance to your post office
 - b. The hours of operation of your post office
 - c. Delivery times for mail
 - d. Delivery times for parcels
 - e. Where your post office is located relative other services
 - f. The cost of shipping parcels

Canada Post’s financial realities and support for different measures

[read to all]

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.

[ask all]

23. To what extent do you agree or disagree with the following statements? [randomize; read scale]

Strongly agree	1
Somewhat agree	2
Somewhat disagree	3
Strongly disagree	4
Don't know/no response [do not read]	99

- a. Canada Post should provide only the level of service it can pay for with its own revenue
- b. Canada Post should receive federal government funding to maintain current service levels and prices across the country

[ask if q23a and b are both agree (1/2) or disagree (3/4)]

24. Of the following statements, which one most closely reflects your opinion? [same order as q23]

- a. Canada Post should provide only the level of service it can pay for with its own revenue
- b. Canada Post should receive federal government funding to maintain current service levels and prices across the country

[ask all]

25. In order to **reduce Canada Post's losses**, to what extent would you support or oppose the following changes? [randomize; read scale]

Strongly support	1
Somewhat support	2
Somewhat oppose	3
Strongly oppose	4
Don't know/no response [do not read]	99

- a. Reduce the number of post offices
- b. Replace corporate owned post offices with less expensive franchises in grocery stores or pharmacies
- c. 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
- d. Reduce the frequency of mail delivery from five days a week to every other day
- e. Increase the basic price of a stamp by roughly 25%
- f. Install outdoor and automated 24/7 parcel lockers [read if needed: 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]
- g. The Government of Canada to directly subsidize more costly and unprofitable postal services in rural and remote communities

Canadian Postal Service Charter

[ask all]

26. Do you agree or disagree with the following statements relating to Canada Post Services?
[randomize; read scale]

Strongly agree	1
Somewhat agree	2
Somewhat disagree	3
Strongly disagree	4
Don't know/no response [do not read]	99

- a. All Canadians should shoulder the same cost (that is, rate) for parcel delivery, regardless of the distance
- b. Canada Post should be allowed to deliver letters less frequently than five days a week to reduce costs

Convenient access to postal services

[ask all]

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

2.5 km or less	1
More than 2.5 km, but less than 5 km	2
Between 5 km and 15 km	3
More than 15 km	4
Don't know/no response [do not read]	99

Rural Moratorium

[read to all]

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.

[ask all]

28. Do you agree or disagree with the following statements? [randomize; read scale]

Strongly agree	1
Somewhat agree	2
Somewhat disagree	3
Strongly disagree	4
Don't know/no response [do not read]	99

- a. 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. **The moratorium should be modified** to allow rural post offices to be replaced with franchises in grocery stores and pharmacies
- c. **The moratorium should end** and Canada Post should be allowed to close underused post offices, even if they are in rural areas

Support for new/additional services in Rural and Remote Areas

[only ask of businesses in rural areas as identified in q4]

[ask if q4=3]

29. Do you support or oppose Canada Post doing the following to better reach rural and remote areas? [randomize]

Strongly support	1
Somewhat support	2
Somewhat oppose	3
Strongly oppose	4
Don't know/no response [do not read]	99

- a. Providing access to financial services at post offices in rural and remote areas in light of a lack of bank branches
- b. Providing convenient access to other government services at rural and remote post offices
- c. Increasing the number of rural post office locations
- d. Extending hours of operation at rural post office locations
- e. Combining small rural post offices in the same geographic area into a single location that offers enhanced services such as automated 24/7 parcel lockers [read if needed: 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]
- f. Creating service hubs within rural communities that feature a post office as well as services from local organizations or businesses

Demographics

[read to all]

The next questions are for statistical purposes only.

[ask all]

30. Where are your clients located? Select all that apply.

Locally (that is, your city/town)	1
Throughout your province, territory or region	2
Across Canada	3
Internationally	4
Other [specify]	5
Don't know/no response [do not read]	99

[ask all]

31. Which of the following best describes your organization? [read until response category selected]

Not for profit (for example, Charity, NGO)	1
Construction	2
Manufacturing	3
Wholesale trade	4
Retail trade	5
Transportation and warehousing	6
Information and cultural industries	7
Finance and insurance	8
Real estate and rental and leasing	9
Professional, scientific and technical services	10
Management of companies and enterprises	11
Administrative and support, waste management and remediation services	12
Educational services	13
Health care and social assistance	14
Arts, entertainment and recreation	15
Accommodation and food services	16
Other services (except public administration)	17
Public administration	18
No response [do not read]	97
Don't know [do not read]	99