

# **Mastio & Company's**

## **Canadian LTL Carrier Customer Value & Loyalty Benchmarking Study**

**10<sup>th</sup> Edition**

**June 2025**



**Metrics to Manage the “Shipper Experience”**



## Study Overview: 2025 Canadian LTL Customer Value & Loyalty Study

### Introduction

Mastio & Company proudly presents the 10th Edition of the Canadian Less-Than-Truckload (LTL) Customer Value & Loyalty Study—a comprehensive analysis designed to illuminate the perceptions, needs, and decision-making drivers of LTL shippers across Canada. This annual study is the industry benchmark for understanding what truly matters to LTL customers and how carriers can outperform the competition.

### Scope and Methodology

- **Robust Sample:** Insights are drawn from in-depth interviews with 983 key decision-makers, generating approximately 2,600 quantitative observations and 5,500 qualitative responses.
- **Comprehensive Coverage:** Nearly 325 LTL carriers were evaluated, with 43 carriers receiving sufficient ratings for detailed comparative analysis.
- **Rigorous Data Collection:** Industry-experienced researchers conducted telephone interviews from late February to May 2025, ensuring high-quality, actionable data.
- **Segmentation:** Results are segmented by geography, shipment volume, industry vertical, and more, allowing for granular analysis tailored to specific business needs.

### Key Questions Answered

Subscribers gain clarity on critical market dynamics, including:

1. **Customer Decision Drivers:**
  - What factors most influence shippers' perceptions of value and loyalty?
  - Which carrier attributes are baseline requirements versus true differentiators?
2. **Competitive Positioning:**
  - How does your company's value and loyalty compare to competitors?
  - Where do you and your competitors stand on the industry value map (inferior, economy, superior, premium)?
  - What actions will shift your market position?
3. **Performance Insights:**

- How do shippers rate your company on key buying factors?
- What are your relative strengths and weaknesses?
- Which improvements will yield the highest impact on customer acquisition and retention?

**4. Role of Pricing:**

- How significant is price in the purchase decision?
- Which performance factors justify a premium?

**5. Market Vulnerability and Opportunity:**

- Which carriers are best positioned to gain or lose market share?
- How can you leverage these insights for growth and profitability?

**Deep-Dive Qualitative Insights**

The study includes extensive open-ended feedback, addressing:

- Recent disappointments (excluding price)
- Carrier switching behavior and rationale
- Cross-border shipping needs and preferences
- Assessment of digital tools and website features

**Multi-Dimensional Analysis**

Data is segmented for actionable insights across:

- **Shipment Volume** (from 2 or fewer to 150+ per week)
- **Industry Verticals** (Manufacturing, Retail, Services, etc.)
- **Geographic Regions** (Ontario, Quebec, Western Canada, Maritimes)

## **Deliverables**

Subscribers receive:

- A detailed printed report
- Microsoft Excel raw data files
- Proprietary segmentation and analysis software for custom data exploration
- Custom tagging features for advanced, client-specific analysis

## **Methodology**

Unlike generic satisfaction surveys, Mastio's approach is grounded in proven methodologies that correlate directly with growth, market share, and profitability. Our dual focus on Customer Value and Loyalty provides clear, actionable dashboards for ongoing performance management.

## **Why Choose Mastio?**

Mastio's research delivers more than just data—it provides strategic clarity. Successful organizations know that sustained growth depends on understanding and exceeding customer expectations. Our study empowers you to:

- Pinpoint what customers value most
- Identify areas for operational or service improvements with the highest ROI
- Align sales and marketing strategies with market realities
- Track progress with empirically validated customer value and loyalty metrics

## **In Summary:**

The 2025 Canadian LTL Customer Value & Loyalty Study is your roadmap to winning more loyal customers, outperforming competitors, and achieving measurable business results in the dynamic LTL market.

## **About Mastio & Company**

With over 36 years of experience and 300+ successful industry studies, Mastio & Company is a trusted partner for organizations seeking to enhance customer understanding, outpace competitors, and drive sustainable business growth. Our research team combines industry expertise with rigorous quality control, delivering insights you can trust.

Carriers included in the 2025 Mastio Canadian LTL Study:

Carrier	Carrier
ABF	Kindersley Transport
ACE Courier	Loomis Express
Apex	Manitoulin Transport
APPS Transport	Maritime-Ontario Freight Lines
Armour Transportation	Midland Transport
Bandstra Transportation	Minimax Express
Bourassa	Morneau
Bourret	Old Dominion
CCT Canada	Overland West Freight Lines
Clarke Transport	Polaris Transport Carriers
CSA Transportation	Purolator Freight
Day & Ross	R&L Carriers
Erb Transport Ltd.	Rosedale Transport Ltd.
Estes	Rosenau Transport
Fastfrate	Speedy Transport
FedEx Freight	TForce Freight
Gardewine	TST-CF Express
General Logistics Systems	Van-Kam Freightways
Grimshaw Trucking	Vitran Express
Guilbalt Group	Willie's Trucking
Hi-Way 9 Express	XPO
Jay's Transport	