



## Executive summary

# Customer Satisfaction Benchmark Research: Home Consumers

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*Prepared for the:*  
National Film Board  
webmaster@nfb.ca

*Ce rapport est aussi disponible en français sur demande*

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*Prepared by:*  
Environics Research Group  
336 MacLaren Street  
Ottawa, ON K2P 0M6

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## Executive summary

### Objectives

The National Film Board of Canada (NFB) is Canada's public film producer and distributor. Environics was retained to undertake research with NFB home consumer customers, to measure satisfaction with the NFB's overall performance, products and service quality. The specific objectives are to:

- Establish satisfaction level benchmarks for overall service, specific service lines and overall product satisfaction, against which to assess future performance;
- Identify key drivers of satisfaction; and,
- Identify service gaps and potential areas for service improvements.

### Methodology

The results are based on an online survey of 1,001 active NFB direct home consumers (aged 16 or older) from a list provided by the NFB. The survey was conducted from February 15 to March 4, 2013. The margin of error for a sample of 1,001 is +/- 2.9 percentage points, 19 times in 20. A more detailed description of the methodology used to conduct this study is presented at the back of this report, along with a copy of the questionnaire. The cost of this research was \$39,729.95 (HST included).

### Key findings

The findings show that the National Film Board has succeeded in establishing a very positive image among home consumers, in terms of overall perceptions, the products it offers and the service quality it provides. Future improvements in these measures are likely to come from shifting home consumers from moderate to strong satisfaction levels, since dissatisfaction levels are already very low.

A more in-depth analysis of the data reveals the key "drivers" or factors influencing home consumers' overall assessment of the NFB's performance. Home consumers are most likely to have a favourable impression if they have positive views about the role, reputation and operational efficiency of the NFB, and if they are satisfied with NFB productions (in terms of quality, relevance, selection) and the cost of NFB products.

The NFB receives relatively weaker ratings in the areas of operational efficiency, selection and cost. Thus, the extent to which the NFB can increase the selection of products available without affecting the price likely provides the greatest opportunity for the NFB to improve its overall image among home consumers.

Key highlights from the survey are presented below.

### Overall performance

- The very large majority of home consumers approve of the NFB's overall performance, with nine in ten who rate it as "excellent" or "good". Home consumers attribute their favourable impressions mainly to product quality, but also to the NFB's service quality.

- Among the small group who rate the NFB's performance as "acceptable" or worse (9% of total sample), the main reasons given are technical issues with the website, insufficient product selection and the perception that NFB is not being adequately promoted.
- When probed about specific aspects of the NFB's performance, home consumers are most positive about the organization's reputation for excellence and its role in promoting Canadian films and perspectives. Ratings are relatively weaker for the efficiency of the NFB's operations and its pioneering work developing online interactive audiovisual content, in part because substantial minorities are unfamiliar enough with these aspects of the NFB to have an opinion.

### Product satisfaction

- There is a high level of satisfaction with the NFB products currently available for purchase, with nine in ten home consumers who say they are "very satisfied" or "satisfied". When probed about specific aspects of the NFB's current library of products, satisfaction is highest for the quality of the productions.
- Two potential areas for improvement include cost and the selection of products available. These two areas receive *relatively* weaker satisfaction ratings. Moreover, while home consumers are generally satisfied with the amount of documentaries, animation and online interactive digital media productions available through the NFB, those who are less satisfied with the NFB's current product library stand out as wanting greater access to documentaries.

### Satisfaction with service quality

- The NFB.ca website is by far the most widely used channel to purchase products (this includes Download-to-Own and Video-on-Demand transactions on NFB.ca as well as online DVD transactions through NFB's iStore which is housed on NFB.ca), well ahead of the 1-800 number or email.
- There is a strong level of satisfaction among home consumers about the service quality received, with more than eight in ten who are "very satisfied" or "satisfied" across all three channels. As well, the very large majority of home consumers say they ultimately got what they needed from the service interaction, regardless of the channel used.
- The main area for potential improvement to the website is navigation and the search function. This aspect received the lowest relative ratings from home consumers about their website experience and is also an area of concern for the small group of home consumers who are dissatisfied with their service experience on NFB.ca.
- There is little evidence of significant improvements needed to the phone and email service channels. While there is a very small group who express dissatisfaction about the length of time to get service or the difficulty getting what they need, these incidents appear limited and do not translate into relatively weaker ratings of these service aspects than others.
- Nine in ten home consumers are satisfied with the payment process during their most recent interaction. The main suggestion for improvement is to expand the payment options to Paypal and Interac.

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For more information, contact the NFB at [webmaster@nfb.ca](mailto:webmaster@nfb.ca)