



## **CANADIAN'S AWARENESS AND PERCEPTION OF THE NFB**

### **Executive Summary**

Submitted to the National Film Board of Canada  
Contract Number 90030-211342/001/CY

Prepared By: Leger

Ce rapport est également disponible en français.  
Contract value: \$46,710.81 (including HST)  
Award date: December 2, 2021  
Delivery date: March 2022

Registration number: POR 054-21  
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# Canadian's Awareness and Perception of the NFB

## Executive Summary

### Prepared for the National Film Board of Canada

Supplier Name: Leger Marketing Inc.

March 2022

This public opinion research report presents the results of a telephone survey conducted by Leger Marketing Inc. on behalf of the National Film Board of Canada (NFB). The research was conducted with 1,500 Canadians between February 3 and February 26, 2022.

Cette publication est aussi disponible en français sous le titre : Connaissance et perception de l'ONF par les Canadiens et les Canadiennes.

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### Catalogue Number:

NF4-37/2022E-PDF

### International Standard Book Number (ISBN):

978-0-660-42889-5

### Related publications (registration number: POR 054-21):

Catalogue Number: NF4-37/2022F-PDF (Final Report, French)

Enquête sur la notoriété et la perception des Canadiens à l'égard de l'ONF.

978-0-660-42890-1

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# 1. Summary

Leger is pleased to submit this report to the National Film Board of Canada (NFB) of a quantitative phone survey assessing the awareness and perception of the NFB among the Canadian population.

This report was prepared by Leger following the awarding of a contract to NFB (contract number 90030-211342/001/CY, awarded December 2, 2021. This contract has a value of \$46,710.81 (including HST).

## 1.1 Background and Objectives

The National Film Board of Canada (NFB) is Canada's public film producer and distributor; an agency of the Government of Canada, the NFB produces and distributes documentary, animation and digital media productions in both English and French. In 2017, a similar study using the same methodology was conducted. NFB's goal is to track the evolution of Canadians' opinions and measure the organization's awareness over time. Specifically, research objectives include:

- Assess Canadians awareness levels of the NFB, including unaided and aided awareness.
- Gauge Canadian public perception of the NFB brand and brand attributes, frequency of viewership, awareness and use of NFB products, services and access channels.
- Identify key drivers of levels of awareness and perceptions of core brand attributes.
- Gain additional insights regarding online and offline behavior of Canadians, in line with NFB mission as a producer and distributor of Canadian content.

## 1.2 Rationale and Intended Use of the Research

NFB regularly monitors Canadian public awareness and perception of the organization, as an aspect of its overall performance evaluation. The survey also helps to understand the behaviour of Canadians in regard to watching documentary and animation in order to better serve our public, improve the NFB's positioning, enhance branding, communications, as well as various public outreach initiatives. The survey also provides key insights needed for both strategic planning and operationalization of initiatives.

### **1.3 Methodology—Quantitative Research**

The quantitative research consisted of telephone interviews, which were conducted using a computer-assisted telephone interviewing system (CATI technology).

Data collection for this survey took place between February 3 and 26, 2022. The national response rate for the survey was 7.35%. The comprehensive distribution of calls is presented in Appendix A. A pre-test of 28 interviews, in both official languages, was conducted on February 3, 2022. More specifically, 11 interviews were conducted in French and 17 in English. The interviews lasted an average of nineteen minutes. The interviews were recorded to assess the level of understanding of each question among respondents. The pretest indicated that the average survey time was too long. Some changes were made to decrease the average time. Some questions were removed, and others were modified. Once the changes were made, the field was launched. Responses from participants who were affected by the changes were deleted.

The main target population in this study was Canadian adults aged 18 and older. To obtain reliable data for each of the subgroups, we surveyed a total sample of 1,500 Canadian adults in all regions of the country. Only one adult respondent was interviewed per household. Respondents were randomly selected from a telephone directory database. The telephone numbers generated in this database were distributed throughout Canada, including the northern territories. In addition to landline telephone numbers, Leger also included cell phone numbers in the base sample to ensure optimal coverage of the Canadian population, particularly youth. Since this is a probability sample, the calculation of the margin of error applies, and the result can be generalized to the Canadian population. The national margin of error for this survey is +/- 2.53%, 19 times out of 20.

As in previous years, the sample of 1,500 adult Canadians was drawn using a stratified regional sampling approach. Soft regional quotas were applied to ensure that a sufficient number of interviews were completed within each region of Canada. The detailed sample distribution is provided in the appendix.

A proportion of the interviews were conducted with a sample of cell-phone numbers, in order to provide an adequate and reliable sample of the youth cohort (18 to 34). While the cell-phone sample did not exclusively target the youth cohort, this age group was over-represented in that target sample. The other interviews were conducted with landline users. According to 2016 national census data from Statistics Canada, Leger weighted the results of this survey by age, gender, region, language (mother tongue) and education level.

Leger meets the strictest quantitative research guidelines. The questionnaire was prepared in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research—Series D—Quantitative Research. Details on the methodology,

Leger's quality control mechanisms, the questionnaire, and the weighting procedures are provided in the appendix.

In the 2017 study, many questions were based on respondents who were aware of NFB's mission (Q4 in the questionnaire). In 2022, for the current study, the base was changed to respondents who have heard of NFB (Q2 in the questionnaire). Therefore, when comparing the 2017 and 2022 results, we will use the 2022 results filtered by Q4.

## **1.4 Overview of the Findings**

### **Awareness of NFB**

- Spontaneously, 5% Canadians have named NFB when thinking about companies or organizations that produce documentary and animated films. Top companies that were mentioned were: Disney (37%), Pixar (17%), National Geographic (11%) and Netflix (10%).
- When asked if they know NFB or if they have seen one of their productions, more than six Canadians out of ten (61%) have answered yes. Almost half (47%), have said they definitely know NFB and 15% have said they think so.
- More than half of Canadians (57%), think that the NFB is a federal government funded organization, while less than one Canadian out of ten (9%) think is a provincial government founded organization and about the same proportion (8%) think that is a privately held enterprise.
- Among respondents who have heard of the NFB, 18% have mentioned being very aware of the NFB, while 27% have mentioned being somewhat aware, meaning that almost half (46%) are aware of the NFB.

### **Exposure of NFB**

- Among respondents who have heard of the NFB, more than a third (34%) have seen their first production at school and the same proportion (34%) have seen their first NFB production on TV or radio.
- In the past twelve months, a quarter of respondents have heard of NFB (23%) have seen or heard something from NFB, while 63% did not. Respondents who have seen or heard about the NFB did so mainly on TV or radio (56%) followed by online sources such as social media or streaming platforms (32%).
- In the past twelve months, less than a fifth of Canadians (17%) have seen or heard an ad from NFB, while 76% did not.

### **Opinion and perceptions of NFB**

- A vast majority of respondents who have heard of NFB (84%) have a favourable opinion of it. Among respondents who have a favourable opinion, the positive elements mentioned are the Canadian artists and Canadian contents (29%), followed by the

documentaries (17%) and the fact that it is informative and factual (16%). Among respondents who do not have a favourable opinion of NFB, the negative elements mentioned are a general dissatisfaction (42%) and the fact that it is government founded (9%).

- Among respondents who have heard of the NFB, the organization is mostly perceived as being educational (93%), creative (87%), and an important Canadian cultural institution (87%). NFB's work is seen as being something that provides a better understanding of Canada (86%) and most of the respondents who have heard of NFB agree that it produces important films (82%).

### **Access to NFB productions online**

- Two third of Canadians who have heard of NFB (65%) wish it was easier to access NFB content online. Only half of them (47%), think that it is easy to find NFB content.
- Among Canadians who have heard of the NFB, only a fifth (22%) have ever visited the website, while 77% did not. An even smaller proportion (12%) is aware that the NFB provides films, interactive Web projects and apps for free on their website. Seven respondents out of ten (71%) have said they are likely to visit the NFB Website in the next twelve months.

### **Productions seen in the last years**

- More than seven respondents out of ten who have heard of NFB (71%) remember ever seeing one of their productions, while 21% did not. In the past twelve months, a third (31%) remember seeing an NFB production.
- Among respondents who remember ever seeing an NFB production, three quarter (75%) have accessed it on TV (broadcast) or were aware that they could access it that way, six out of ten (62%) did so through a public screening and about the same proportion (61%) through school.
- Among respondents who did not remember seeing an NFB production, the best-known platforms are also TV (48%), public screening (42%) and school (37%).
- It is on streaming platforms that respondents have accessed most often NFB productions. On average, they did so 6,5 times in the past year, followed by social media (5,1) and the NFB Website or app (5,1).
- Over the next year, more than half of the respondents (51%) expect to take advantage of the NFB website or apps more often than they did before.
- In 2021, the NFB production that was seen or heard of by most Canadians was *Borealis* (17%), followed by *Because we are girls* (14%). Respondents who have heard of those NFB production mainly did so on social media (21%) and with advertising (14%). One respondent who saw the production out of five (19%) have watched it on TV (broadcast).

### Preferences in terms of documentaries

- Spontaneously, a third of Canadians (32%) have said that they watch documentaries on TV without specifying any channel. A quarter (25%) have said they watch documentaries on Netflix and 12% on YouTube. More than one Canadian out of ten (13%) don't watch documentaries.
- Among respondents who watch documentaries, Netflix is the preferred platform by far (63%). Only 2% of respondents who watch documentaries have mentioned the NFB website as their preferred platform.
- Regarding the format, a third (33%) prefer a format of 30 to 60 minutes, while the same proportion (34%) have no preferences.

### 1.5 Notes on the Interpretation of the Findings

The opinions and observations expressed in this document do not reflect those of the National Film Board of Canada. This report was compiled by Leger based on research conducted specifically for this project. This research is probabilistic; the results can be generalized to the general population of Canada. The research was designed with this objective in mind.

### 1.6 Declaration of Political Neutrality and Contact Information

I hereby certify, as chief agent of Leger, that the deliverables are in full compliance with the neutrality requirements of the [Policy on Communications and Federal Identity](#) and the [Directive on the Management of Communications—Appendix C](#) (Appendix C: Mandatory Procedures for Public Opinion Research).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party positions, or the assessment of the performance of a political party or its leaders.

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