



OMDC Client Satisfaction Survey (2017)

Summary Report

August 31, 2018

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Introduction

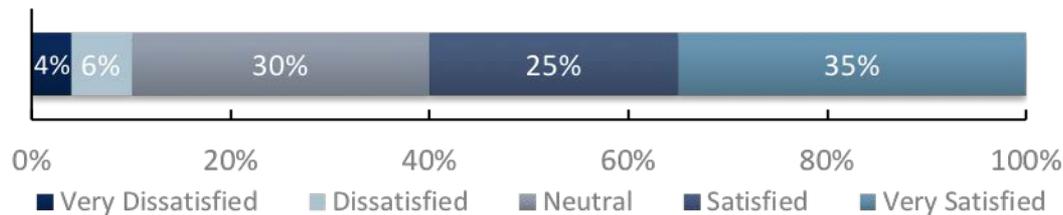
- In September 2017, OMDC commissioned OPTIMUS | SBR to conduct a survey of OMDC stakeholders to determine their level of satisfaction with the delivery of programs and services. The survey also asked stakeholders to identify how programs might better meet their needs.
- OMDC has prepared an Action Plan and Management Response to the feedback received from stakeholders. Action items are shown throughout the document, as well as in summary form in Appendix I. The Action Plan and Management Response were created solely by OMDC and do not reflect the opinions or work of OPTIMUS | SBR.
- A previous OMDC Customer Satisfaction Survey was carried out in 2011. Where possible, 2017 results have been compared with 2011 results.
- OMDC would like to extend our thanks to the OPTIMUS | SBR team as well as to all of our stakeholders for taking the time to provide their feedback and comments.

Note to Readers

Action Plan to Respond to Client Satisfaction Survey

OMDC management created an Action Plan to address areas of low stakeholder satisfaction. Action Items were created where the percentage of respondents who said that they were either “Satisfied” or “Very Satisfied” in a particular area was less than 70%. In cases where the level of satisfaction was 70% or higher, but an issue of common concern was noted by multiple respondents in their comments, an Action Item was created. Action Items are provided throughout the document. A summary list is provided in Appendix I.

(Note that, due to Neutral responses, this does not signify that greater than 30% of respondents were dissatisfied or very dissatisfied. For example, an instance where 60% were satisfied/very satisfied, 30% were neutral and 10% were dissatisfied/very dissatisfied would still have met the criteria for developing an Action Item. Please see a visualization below.)



Legend: Symbols Used Throughout this Report



Indicates an Action Item. A summary of Action Items is provided in Appendix I.



Please find the Management Response in Appendix II.

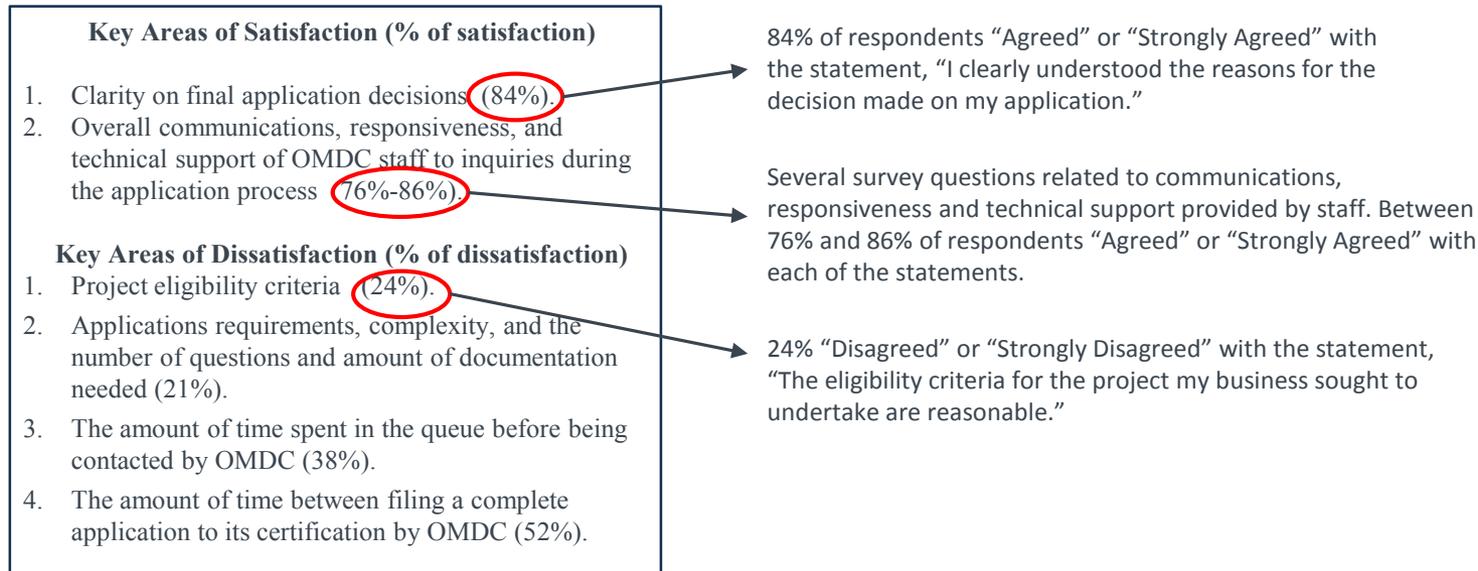
Note to Readers, cont'd

Percentages Used in this Report

Respondents were asked to indicate their level of agreement with statements, using the options Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree. In the document that follows, the percentages reported under “Key Areas of Satisfaction” represent the sum of those who Agreed or Strongly Agreed with a positive statement (and the reverse in the case of a negative statement). “Key Areas of Dissatisfaction” is the sum of those who Disagreed or Strongly Disagreed with a positive statement (and the reverse in the case of a negative statement).

In some cases the responses to several survey questions related to a particular area were rolled together. In these cases the percentage is shown as a range. An example is shown below.

Example – how to read a chart in this document



Methodology: Survey and Analysis

Survey Methodology

- An English and French survey was open to the public for three weeks, from October 11th, 2017 until October 31st, 2017.
- A total of 1,100 responses were received across both surveys, with 703 respondents completing the survey through to the end.
- The survey included a total of 67 questions and branching logic that presented respondents only with questions relevant to their relationship with OMDC. Questions at the outset of the survey were designed to gather information around which programs or services respondents have accessed. Respondents would then be directed towards the relevant sections in the survey to provide their feedback.

Analysis

- A threshold of less than 70% Strongly Agree + Agree responses was used as an indicator of where opportunities for improvement may exist. This 70% threshold is shown in most charts in this document as a red dotted line.
- Responses of “Not Sure” and “Not Applicable” have been removed from calculations and reporting.
- Throughout this report, percentages reported for questions are based on the number of respondents to that particular questions (the “n=X” amount) and not on the total number of survey respondents.

Open-ended responses

- It should be noted that many individuals who take the time to write an open-ended response are more likely to be commenting on their dissatisfaction. This can lead to a negative interpretation of results where only qualitative responses are analyzed or read.
- The open-ended feedback presented in this report are meant to represent overarching themes seen in the comments that were received.

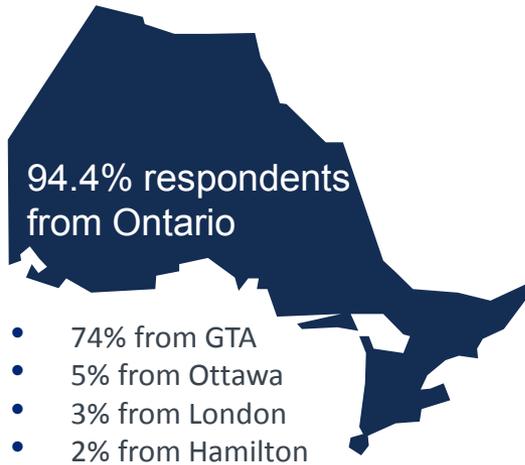
Comparison to 2011 Survey Results

- To assess differences between the 2017 and 2011 surveys, a statistical t-test was performed to determine the significance of variability between the two sets of responses. The size of change between 2011 and 2017 results for statistical significance is dependent on the sample size of the question asked.

Respondent Demographics

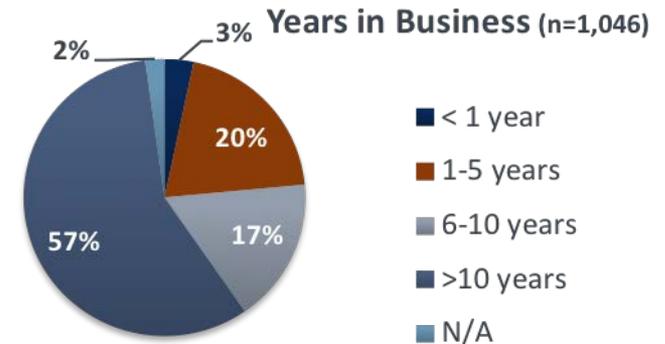
Geography and Language

Of the 1,100 survey respondents, 96% were from Canada, with approximately 94% being from Ontario and a majority from the GTA. Approximately 98% of surveys were completed in English.

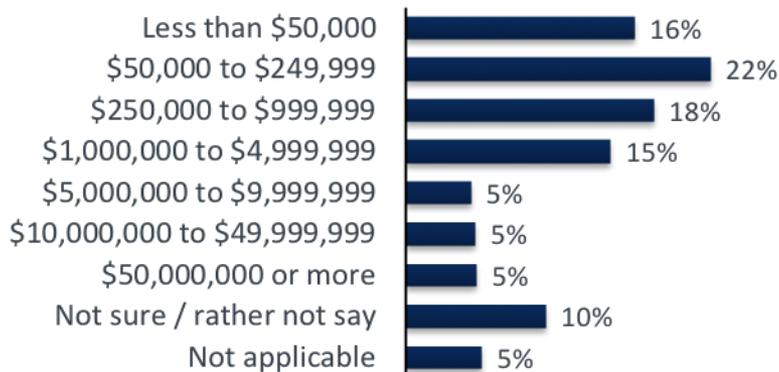


12 Other countries:

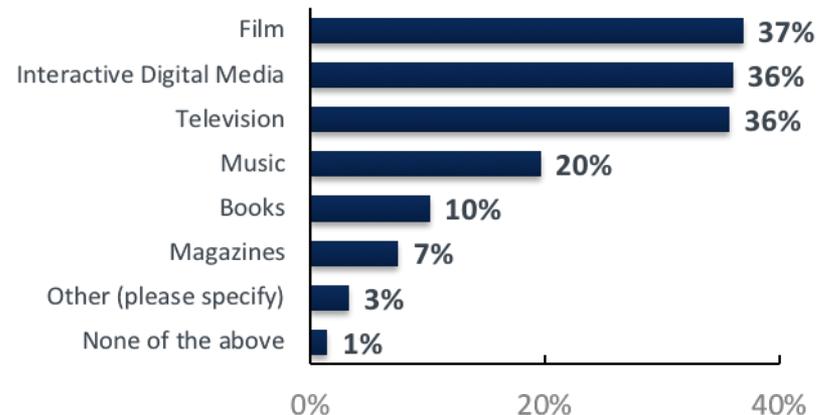
- Afghanistan (1)
- Albania (1)
- Australia (1)
- China (1)
- Colombia (1)
- Finland (1)
- Germany (1)
- India (1)
- Netherlands (1)
- Togo (1)
- United Kingdom (12)
- United States (21)



Sales Revenue (n=1,038)



Respondents by Creative Industry (n=1,100)



Satisfaction with OMDC

Summary

Overall Satisfaction with OMDC

- Overall satisfaction with OMDC is high, with 83% of respondents saying they would recommend OMDC's programs and services to others. This does not represent a statistically significant change from 2011 survey results.

OMDC importance to creative industry growth

- Overall perception of OMDC as a vital resource to the continued growth of their industry sector(s) is high, with 80% of respondents saying that OMDC is key to the growth of creative industries in Ontario. This does not represent a statistically significant change from 2011 survey results.

Overall quality of service

- Overall quality of OMDC services is high, with 77% of respondents believing that OMDC provides a high level of service to Ontario's cultural industries. This does not represent a statistically significant change from 2011 survey results.

Overall experience working with OMDC

- Respondents' overall experience working with OMDC remains high, with 76% of respondents claiming to have had a positive experience with OMDC. This does not represent a statistically significant change from 2011 survey results.

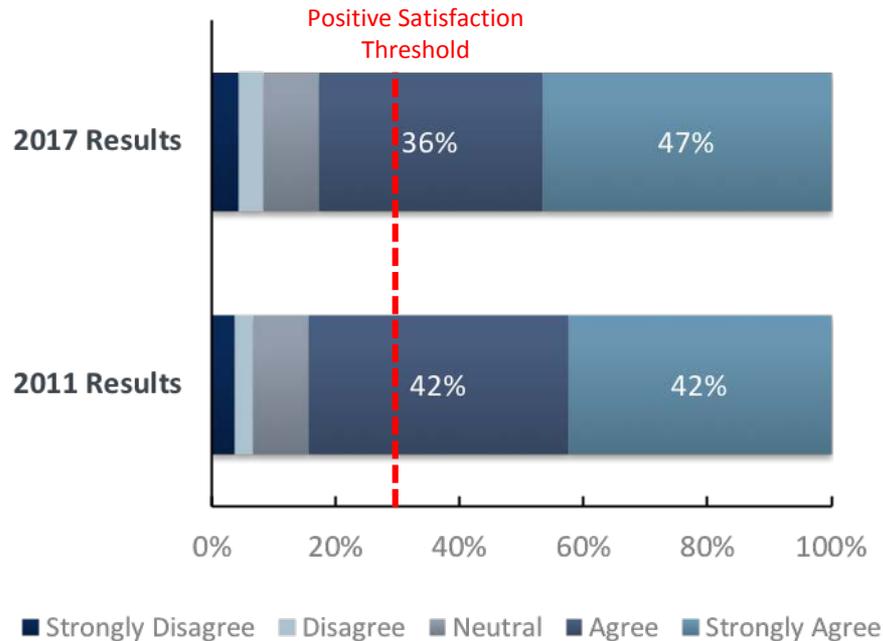
Satisfaction with OMDC

Overall satisfaction with OMDC

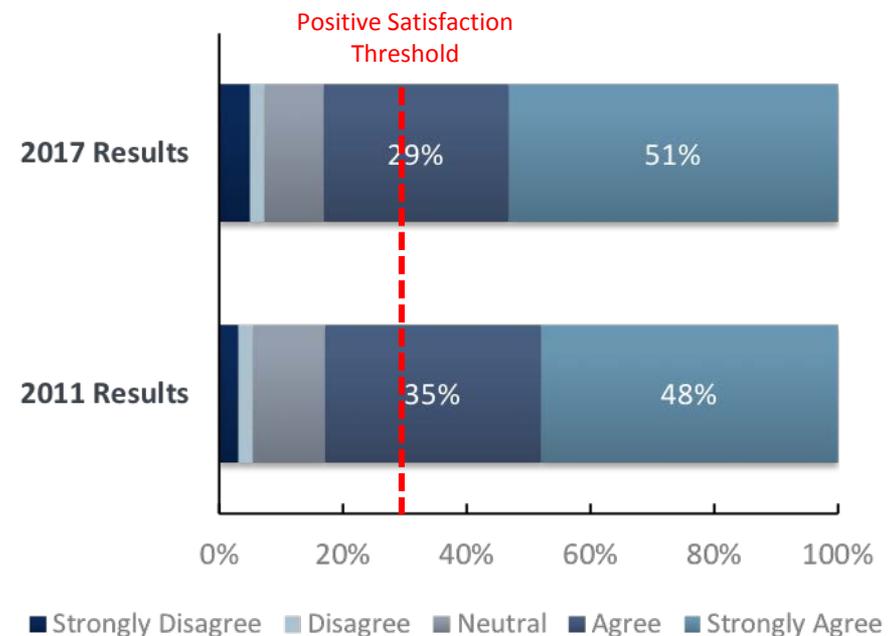
Overall satisfaction with OMDC remains high with 83% of respondents saying they would recommend working with OMDC to others. The change in overall satisfaction from 2011 to 2017 is not statistically significant.

Overall perception of OMDC's importance remains high, with 80% of respondents saying that OMDC is key to the growth of creative industries in Ontario. The change in perception of importance from 2011 to 2017 is not statistically significant.

Recommending OMDC to others (n=684)



OMDC importance to industry growth (n=681)



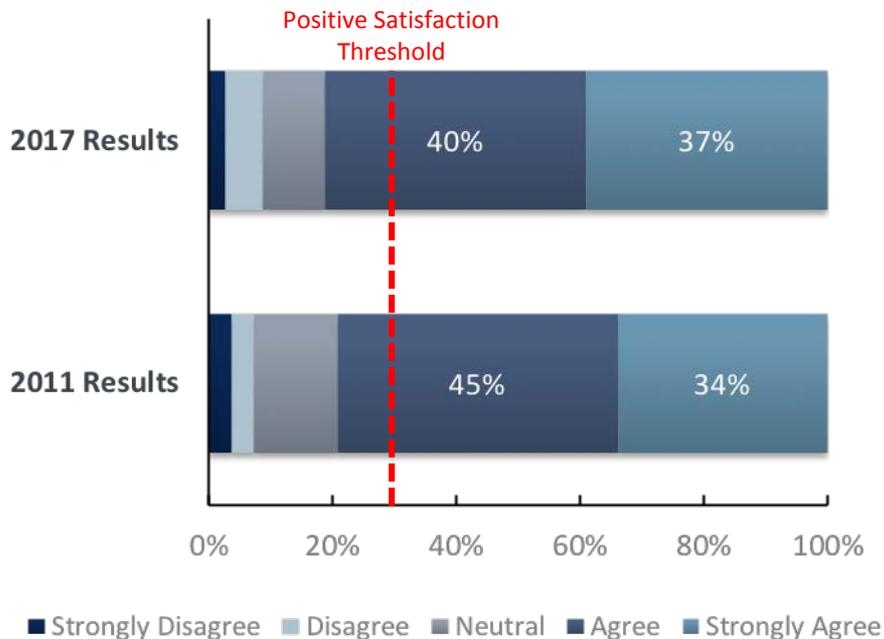
Satisfaction with OMDC

Overall satisfaction with OMDC, cont'd

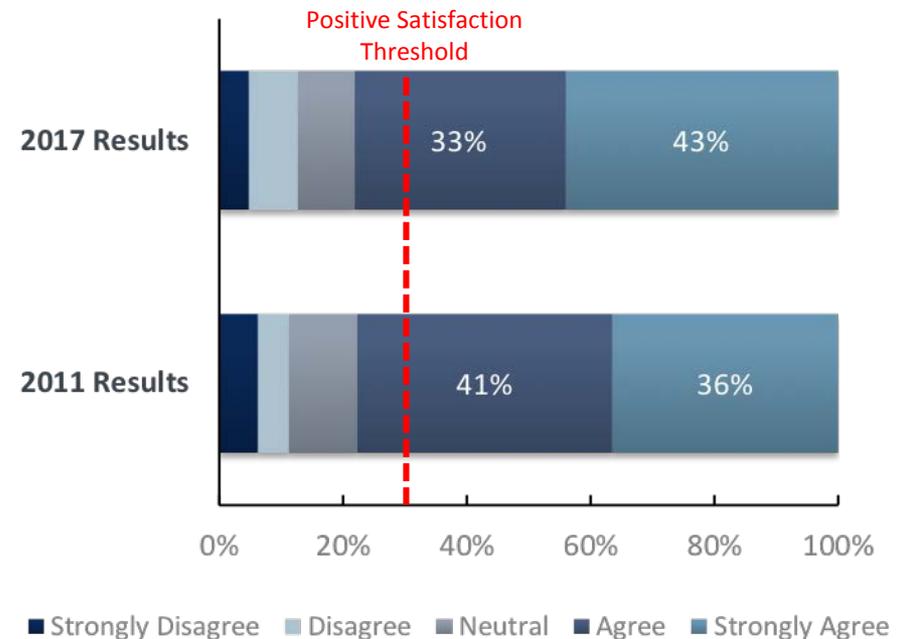
Seventy-seven percent of respondents believe that OMDC provides a high level of service to Ontario's creative industries.

Respondents' overall experience working with OMDC remains high, with 76% of respondents claiming to have had a positive experience with OMDC. The change in satisfaction with the overall experience of working with OMDC from 2011 to 2017 is not statistically significant.

Perception of OMDC Service Levels (n=677)



Positive Service Experience (n=694)



Satisfaction with OMDC

Overall satisfaction with OMDC, cont'd

By sector

	All	Mags	Books	Music	Film	TV	IDM
I would recommend working with OMDC to another business, colleague or friend	83%	91%	85%	85%	81%	80%	78%
OMDC is key to the continued growth of the creative industries in Ontario	80%	86%	89%	87%	82%	81%	80%
Overall, I believe that OMDC offers a high level of service to the creative industries	77%	95%	89%	88%	78%	76%	77%
Overall, my experience with OMDC has been positive	76%	84%	90%	87%	75%	73%	72%

Respondents from the magazine, book and music industries had the highest levels of overall satisfaction (84% – 95%).

Satisfaction was somewhat lower in the film, TV and IDM industries (72% – 87%), though still above the 70% threshold.

Satisfaction with OMDC

Overall satisfaction with OMDC, cont'd

By company age and number of employees

	By years in operation				By number of employees					
	Less than 1	1 to 5	6 to 10	More than 10	Fewer than 5	5 to 19	20 to 49	50 to 99	100 to 500	More than 500
I would recommend working with OMDC to another business, colleague or friend	81%	79%	81%	85%	84%	80%	81%	82%	90%	79%
OMDC is key to the continued growth of the creative industries in Ontario	81%	81%	82%	84%	82%	84%	83%	77%	94%	71%
Overall, I believe that OMDC offers a high level of service to the creative industries	85%	76%	81%	83%	81%	84%	82%	82%	90%	50%
Overall, my experience with OMDC has been positive	74%	70%	79%	81%	79%	79%	77%	87%	91%	50%

Overall satisfaction was highest among those who worked for companies that had been operating for more than ten years (81% – 85%) across the four questions.

Those who worked for companies with 100 to 500 employees were significantly more satisfied overall (90% – 94%), while those who worked for companies having more than 500 employees were least satisfied overall (50% – 79%).

Satisfaction with OMDC

Overall satisfaction with OMDC, cont'd

By annual revenue

	By Annual Revenue						
	Less than \$50,000	\$50,000 to \$249,999	\$250,000 to \$999,999	\$1,000,000 to \$4,999,999	\$5,000,000 to \$9,999,999	\$10,000,000 to \$49,999,999	\$50,000,000 or more
I would recommend working with OMDC to another business, colleague or friend	73%	83%	87%	86%	88%	85%	75%
OMDC is key to the continued growth of the creative industries in Ontario	75%	81%	89%	87%	81%	86%	75%
Overall, I believe that OMDC offers a high level of service to the creative industries	71%	81%	89%	83%	91%	85%	67%
Overall, my experience with OMDC has been positive	68%	77%	85%	82%	85%	89%	58%

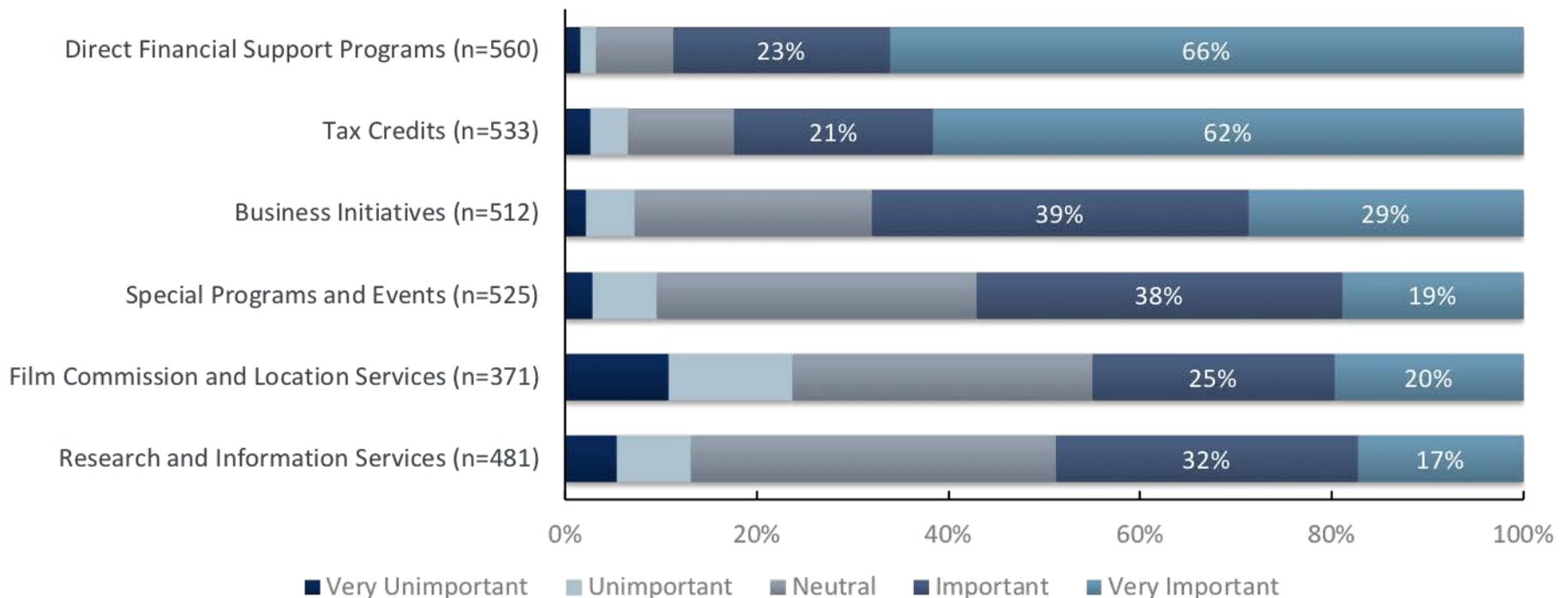
Overall satisfaction was highest for respondents from companies reporting annual revenues between \$250,000 and \$999,999 (85% – 89%).

Those who worked for the smallest companies (annual revenue under \$50,000) and the largest companies (revenue of \$50 million or more) were significantly less satisfied overall (68% – 75% and 58% – 75%, respectively).

Importance of Service Areas

Direct Financial Support Programs (89%) and Tax Credits (83%) are perceived as the most important services offered by OMDC.

Importance of OMDC Service Areas



Industry Trends



Summary

Growth Drivers

- Overall, business development opportunities and access to capital are seen by respondents as the most important drivers for the growth of their businesses, while transition to non-linear value-chains is the least important. Many respondents reinforced the importance of having access to funding, but also focused on a need for tax credits, international collaboration, and networking.

Success Drivers

- New revenue streams, new digital platforms, and social media marketing opportunities are seen as the most important drivers for success, while M&A opportunities are not seen as least important. This indicates that respondents are focused on the vehicles (money and platforms) to deliver their business. While respondents believe that funding is critical to ongoing success, feedback also touched on the importance of developing and nurturing talent, promoting Canadian content, and having improved access to information.

Industry Trends

Growth Drivers by industry

Business development opportunities and access to capital are within the top five most important growth drivers for all sectors.

The Five Most Important Growth Drivers by Sector

Books	Magazines	Television	Film	Interactive Digital Media	Music
Business development opportunities	Business development opportunities	Access to capital	Access to capital	Access to capital	Access to capital
Access to the right market(s)	Access to capital	Business development opportunities	Business development opportunities	Business development opportunities	Building networks that will allow me to grow my business
Access to capital	Staying abreast of changing technologies, in Canada and globally	Building networks that will allow me to grow my business	Building networks that will allow me to grow my business	Building networks that will allow me to grow my business	Business development opportunities
Exporting my products internationally	New and emerging methods of digital distribution	Access to the right market(s)	Exporting my products internationally	Acquiring and retaining top talent	Access to the right market(s)
Protecting the intellectual property of my business	Identification of business “best practices” in my industry	Exporting my products internationally	Access to the right market(s)	Access to the right market(s)	Staying abreast of changing technologies, in Canada and globally

Industry Trends

Success Drivers by industry

New revenue streams and new digital platforms for content distribution are seen by respondents in all sectors as important success drivers

The Five Most Important Success Drivers by Sector

Books	Magazines	Television	Film	Interactive Digital Media	Music
New revenue streams	New revenue streams	New revenue streams	New revenue streams	New revenue streams	New revenue streams
Emerging intellectual property legislation or other regulatory policies	New digital platforms for content distribution	New content delivery models	New content delivery models	New digital platforms for content distribution	Social media marketing opportunities
Social media marketing opportunities	Social media marketing opportunities	New digital platforms for content distribution	Increase in private equity and venture capital	Social media marketing opportunities	New digital platforms for content distribution
New digital platforms for content distribution	New products or services	Increase in private equity and venture capital	New digital platforms for content distribution	New products or services	Cross-sector collaboration and partnerships
New products or services	New content delivery models	New products or services	Social media marketing opportunities	New content delivery models	New products or services

Programs and Tax Credits

Management
Response

Book Sector programs and tax credit

Satisfaction with Book sector programs is very high for all areas. Respondents identified the responsiveness of staff and overall communications, turnaround times for decisions and funding receipt, and clarity around application decisions as major areas of excellence. Satisfaction levels for the Ontario Book Publishing Tax Credit are mixed, but 91% of respondents believe it is worth applying despite high levels of dissatisfaction with eligibility requirements, application requirements, and turnaround times.

Direct Financial Support Programs

Key Areas of Satisfaction (% of satisfaction)

1. Staff members who handle telephone inquiries (97%).
2. Overall communications and responsiveness of OMDC staff during the application process (96%).
3. Turnaround times for decisions on applications and the timelines for receiving funding once approved (92%).
4. Clarity provided by OMDC regarding application decisions (83%).

Book Publishing Tax Credit

Key Areas of Satisfaction (% of satisfaction)

1. Overall communications, responsiveness, and technical support of OMDC staff to inquiries during the application process (76%-86%).
2. Clarity on final application decisions (84%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Project eligibility criteria (24%).
2. Application requirements, complexity, and the number of questions and amount of documentation needed (21%). Action Item A1
3. The amount of time spent in the queue before being contacted by OMDC (38%). Action Item B1
4. The amount of time between filing a complete application to its certification by OMDC (52%). Action Item B1

Action Items

- A1. OMDC will continue to advise government on areas where eligibility requirements could be modernized and/or modified.
- B1. Continue to review process for streamlining.

Programs and Tax Credits

Magazine Sector programs



Overall satisfaction with magazine sector direct financial support programs is mixed, with high satisfaction seen for communications and the overall responsiveness of OMDC, but eligibility and application requirements being seen as prime areas of dissatisfaction, along with the total amount of available funding.

Direct Financial Support Programs

Key Areas of Satisfaction (% of satisfaction)

1. Overall communications and responsiveness from OMDC and quality of staff handling telephone inquiries or providing technical support (73%-79%).
2. Turnaround times for decisions on applications (78%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Eligibility requirements for businesses and projects (21%-24%). Action Item A3
2. Application requirements and complexity (27%). Action Item A2
3. Usefulness of application materials and tools (e.g. templates, forms, OAP) (15%).
4. Maximum amount of funding available (19%).

Action Items

A2. Program staff will track application requirement challenges to identify new or common issues.

A3. Staff will investigate specific concerns to determine if eligibility criteria needs to be clarified or revised.

Programs and Tax Credits

Management
Response

Film & Television Sector programs and tax credits

Satisfaction levels for film and television sector programs are low overall, with most areas receiving satisfaction scores under the threshold. Major areas of dissatisfaction include eligibility criteria, decision turnaround times, and the total amount of available funding. Satisfaction levels for tax credits for the film and television are low, but they remain an important service offered by OMDC with a high percentage of respondents believe it is worth applying despite high levels of dissatisfaction.

Direct Financial Support Programs*

Key Areas of Satisfaction (% of satisfaction)

1. OMDC staff who handle telephone inquiries during application process are friendly and informed (85%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Eligibility criteria for businesses and projects (21%-22%). Action Item A3
2. Decision turnaround times on applications and the period of time between application approval and receipt of funding (37%). Action Item B2
3. Clarity around application decisions (28%). Action Item A4
4. The maximum amount of available funding (43%).

Tax Credits for Film & Television Sectors

Key Areas of Satisfaction (% of satisfaction)

1. Business eligibility requirements (71%).
2. Quality of staff that handled telephone inquiries (79%).
3. Online Application Portal technical support (66%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Project eligibility criteria (17%).
2. Applications requirements, complexity, and the number of questions and amount of documentation needed (31%-35%). Action Item A1
3. Information gathering (the number of information sessions, the accessibility of tax credit information, and overall communications from OMDC) (17%-18%).
4. Overall responsiveness of OMDC staff (25%).
5. The amount of time spent in the queue before being contacted by OMDC, the amount of time the file was in active analysis, and the amount of time between filing a complete application to its certification by OMDC (44%-67%). Action Item B1

Action Items

- A1. OMDC will continue to advise government on areas where eligibility requirements could be modernized and/or modified.
- A3. Staff will investigate specific concerns to determine if eligibility criteria needs to be clarified or revised.
- A4. Continue to provide written context and key feedback to all applicants.
- B1. Continue to review process for streamlining.
- B2. Examine turnaround time within context of Film Fund evaluation.

Programs and Tax Credits

Music Sector programs

Satisfaction levels for music sector programs are mixed, with the responsiveness of staff and overall communications from OMDC being seen as major strong points. Areas of dissatisfaction include the complexity of applications and turnaround times on application decisions and the time between approval and receipt of funding.

Direct Financial Support Programs

Key Areas of Satisfaction (% of satisfaction)

1. Overall communications and responsiveness of OMDC staff to inquiries during the application process (89%-92%).
2. Technical support with the Online Application Portal (83%).
3. Reporting requirements for the program (81%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Application requirements and complexity (34%). Action Item A2
2. Turnaround times on application decisions and the time between approval and receipt of funding (19%-21%).
3. The program payment schedule (12%).

Action Items

A2. Program staff will track application requirement challenges to identify new or common issues.

Programs and Tax Credits

Interactive Digital Media Sector programs and tax credit

Management Response

Satisfaction levels for IDM sector programs are low, with few areas surpassing the 70% satisfaction threshold. Areas of satisfaction include the quality of communications and responsiveness of OMDC, while major areas of dissatisfaction include eligibility criteria, application complexity, and decision turnaround times, and turnaround times on application decisions and the time between approval and receipt of funding. Satisfaction levels for the Ontario Interactive Digital Media Tax Credit are very low, leading to only 64% of respondents answering that it is worth applying for the credits despite the amount of effort required.

Direct Financial Support Programs

Key Areas of Satisfaction (% of satisfaction)

1. Overall communications and responsiveness of OMDC staff to inquiries (72%-74%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Eligibility criteria for businesses and projects (25%-26%). Action Item A3
2. Application requirements and complexity (34%). Action Item A2
3. Turnaround times on application decisions and the time between approval and receipt of funding (34%-35%). Action Item B1
4. The program payment schedule (27%).

IDM Tax Credit

Key Areas of Satisfaction (% of satisfaction)

1. Quality of staff that handled telephone inquiries (76%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Project and business eligibility criteria (30%-37%). Action Item A1
2. Information gathering (the number of information sessions, the accessibility of tax credit information, and overall communications from OMDC) (25%-35%).
3. Applications materials, complexity, and the number of questions and amount of documentation needed (24%-54%). Action Item A1
4. The amount of time spent in the queue before being contacted by OMDC, the amount of time the file was in active analysis, and the amount of time between filing a complete application to its certification (48%-79%). Action Item B1
5. Decision criteria and their communication to applicants (25%).

Action Items

- A1. OMDC will continue to advise government on areas where eligibility requirements could be modernized and/or modified.
- A2. Program staff will track application requirement challenges to identify new or common issues.
- A3. Staff will investigate specific concerns to determine if eligibility criteria needs to be clarified or revised.
- B1. Continue to review process for streamlining.

Programs and Tax Credits

Research Grants / Business Intelligence Program

Overall satisfaction with the former research grant program and the new business intelligence program is mostly positive, with approximately two-thirds of surveyed areas surpassing the 70% satisfaction threshold. Key areas of satisfaction include overall communications, responsiveness, and support of OMDC staff, while the number of information sessions offered and the complexity of applications are areas of dissatisfaction.

Direct Financial Support Programs

Key Areas of Satisfaction (% of satisfaction)

1. Overall communications, responsiveness, and support of OMDC staff to inquiries during the application process (81%-83%).
2. Accessibility of information regarding programs and eligibility requirements (84%).
3. Clarity on application decisions (80%).

Key Areas of Dissatisfaction (% of dissatisfaction)

1. Number of information sessions offered (18%).
2. Application requirements and complexity (12.5%).
3. Maximum amount of available funding (22%).

Non-Financial Supports and Services

Summary

Business Initiatives

- From Page to Screen is the most commonly accessed OMDC Business Initiative with 44% of respondents having accessed it. Overall satisfaction with initiatives is high, with the majority of critical feedback centred around eligibility criteria and access barriers.

Special Programs and Events

- Digital Dialogue and Celebrate Ontario are the most accessed programs amongst respondents with 44% and 40% of respondents having accessed them respectively. Participants value the information and networking opportunities these programs and events present, but there is a need for more diverse and specialized events.

Film Commission and Location Services

- The Ontario Production Guide and Digital Locations Library are the most accessed services with 56% and 55% of respondents having accessed them respectively. Respondents are satisfied with the usefulness of the film commission and its staff, but find that OMDC's film commission and location services require updating and can be too Toronto-centric, resulting in some using competing products and tools.
- **Note that the Digital Locations Library has been significantly overhauled since the release of this survey.*

Research and Information Services

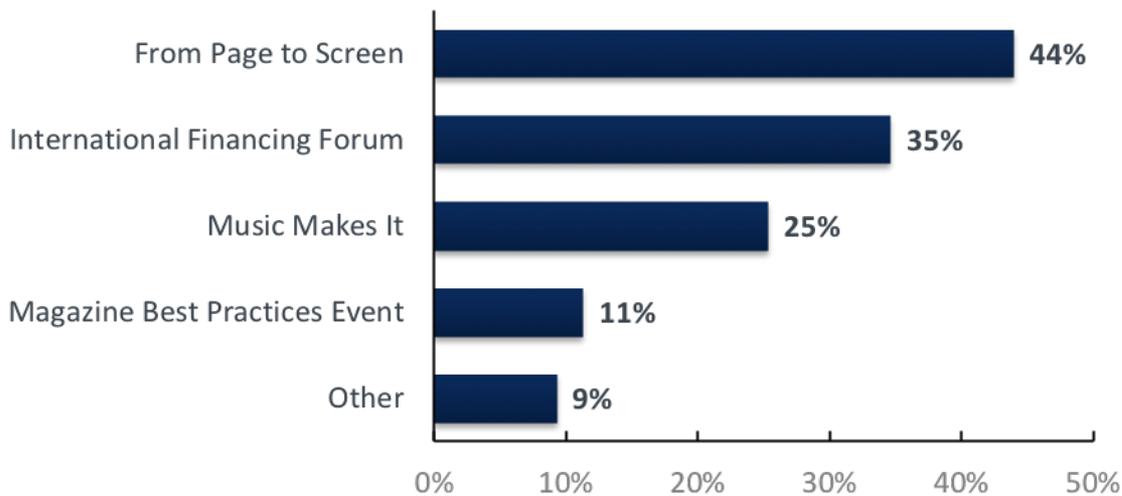
- While participants respond positively to the quality of information presented, respondents would prefer more frequent information that is more tailored and researched, as well as more promotion of what is available. Users are looking for a deeper level of insight and more up-to-date information than provided or promoted currently by OMDC.

Non-Financial Supports and Services

Business Initiatives

From Page to Screen is the most commonly accessed OMDC Business Initiative with 44% of respondents having accessed it. Overall satisfaction with initiatives is high, with the majority of critical feedback centred around eligibility criteria and access barriers.

Business Initiatives by Access Rate (n=150)



- *“The OMDC is very much in tune with the cultural industries and the challenges we face. Generally speaking, the programming is forward thinking and helpful.”*
- *“The eligibility criteria for IFF is overly restrictive. It requires that the applicant has a credit of producer rather than being an employee or owner of a company where others have fulfilled that role and the company has been an active producing company. [...]. For Page to Screen, the eligibility does not allow for a non-Ontario resident to participate from an eligible Ontario company which for a small company, is overly restrictive and doesn't help the program.”*
- *“The OMDC should look at allowing producers with less experience to access these initiatives.”*

Action Item A3

Action Items

A3. Staff will investigate specific concerns to determine if eligibility criteria needs to be clarified or revised.

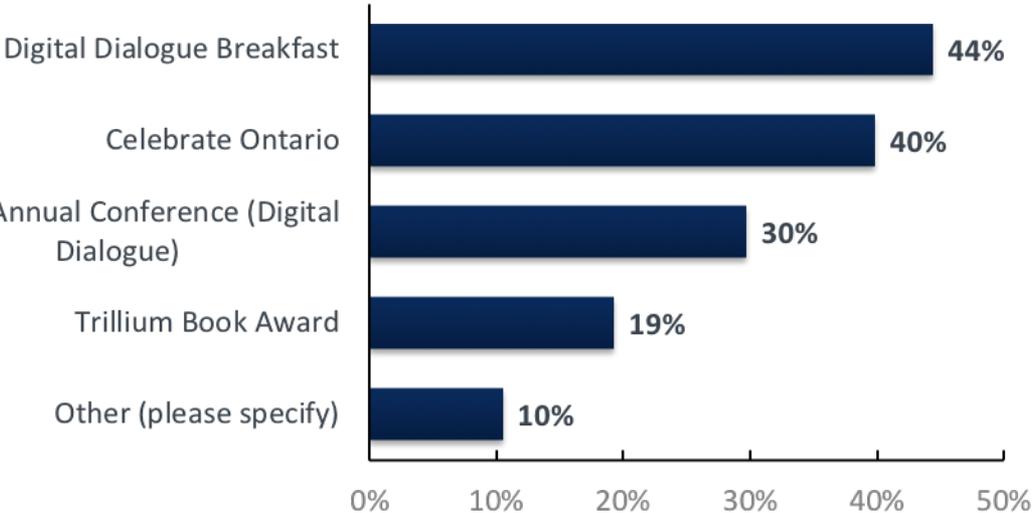
Non-Financial Supports and Services

Special Programs and Events

Digital Dialogue Breakfast and Celebrate Ontario are the most accessed special programs and events across all respondents, with 44% and 40% of respondents having accessed them respectively. Participants value the information and networking opportunities these programs and events present, but there is a need for more diverse and specialized events.

Special Programs and Events by Access Rate

(n=286)



“The panels and presenters at the events are active experts in their field and therefore provide relevant information that help us to build our business and identify opportunities, solutions and strategies. We appreciate the candid and inspiring presentations and are provided with practical information we can apply to create value and revenue within our industry.”

Action Item D3

“The Digital Dialogue Breakfasts are great for getting new knowledge from other sectors, meet people, especially the outside of Toronto ones.”

Action Item D2

“OMDC usually organizes broad events that reach many industries. I would like them to consider very focused events that discuss topics at an advanced level with an assumption of prior experience.”

Action Item E4

Action Items

- D2. Continue to offer Digital Dialogue Breakfasts outside Toronto.
- D3. Ensure sponsored panels strive to have gender parity and diversity.
- E4. Continue to include a broad and diverse range of topics, panelists and speakers for Digital Dialogue Breakfasts.

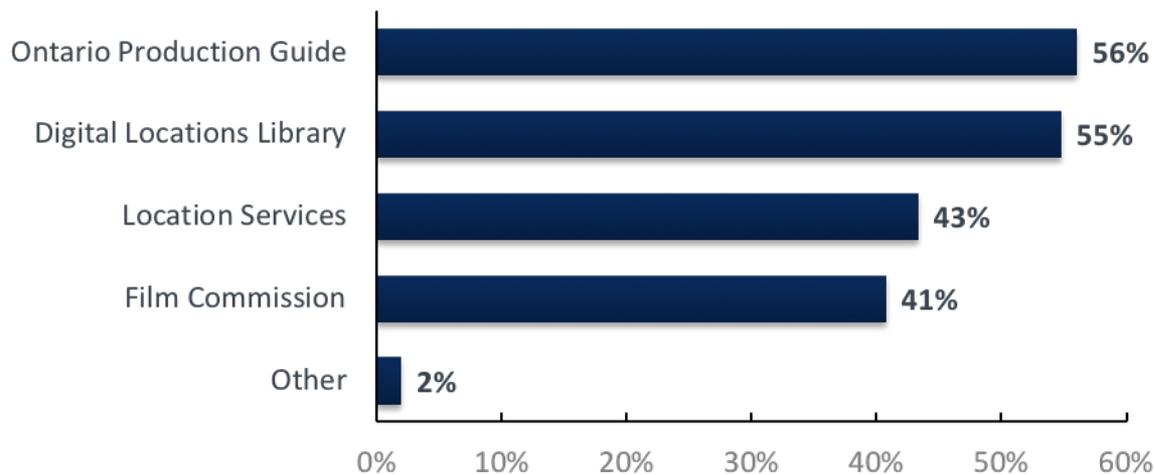
Non-Financial Supports and Services

Film Commission and Location Services

The Ontario Production Guide and Digital Locations Library are the most accessed services with 56% and 55% of respondents having accessed them respectively. Respondents are satisfied with the usefulness of the film commission and its staff, but find that OMDC’s film commission and location services require updating and can come across as Toronto-centric.

Film Commission and Location Services by Use

(n=157)



*Note: the survey was carried out shortly before the launch of a significant Library update and redesign.

- “Keep up the good work!” Action Item C1
- “With the amount of filming in Northern Ontario, I would like to see more choices of locations in Sault Ste. Marie, Sudbury, and North Bay.” Action Item D1
- “OMDC should look at Set Scouter and their user interface and try to meet that standard of customer service, user friendly-ness.”
- “Commission promotions at international markets promote Toronto extremely effectively, but do not effectively represent the regions. (Even when a handful of regional locations are shown in images, the target market doesn't distinguish them from Toronto).”

Action Items

C1. Digital Location Library upgrade was completed following Client Satisfaction Survey.

D1. Will continue regional outreach sessions.

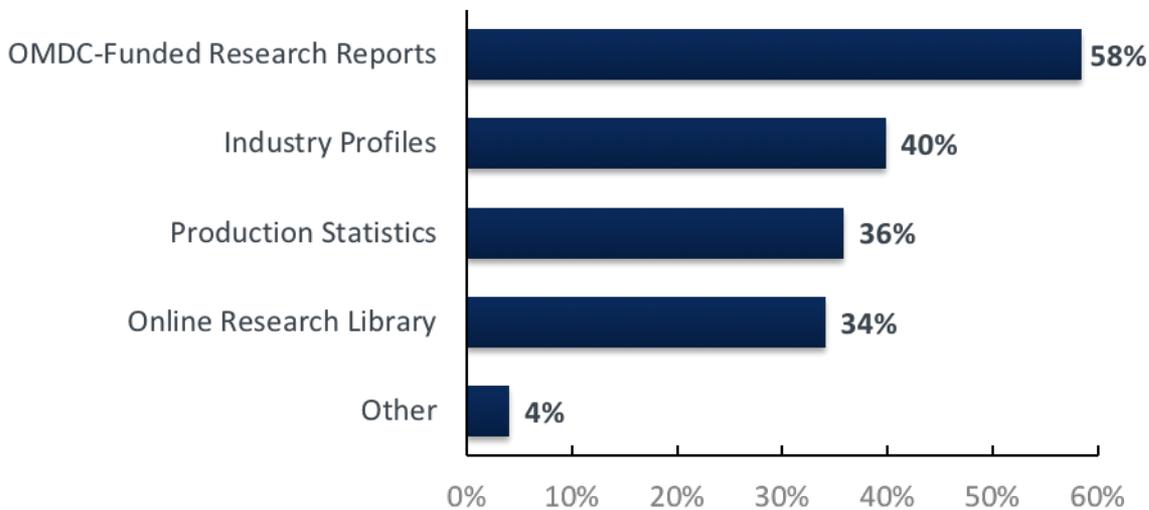
Non-Financial Supports and Services

Research and information services

Funded Research Reports are the most accessed research and information services offered by OMDC, and while users are satisfied with the quality of what is presented, they would appreciate more in-depth and up-to-date information.

Research and Information Services by Use

(n=226)



- *“Although I don't use these services weekly - the OMDC provides reliable and thorough information on aspects of our industry that are important to professionals working in our industry.”* (Action Item E1)
- *“Although quality is high, the data seems to be at the highest level and doesn't drill down to information that would be much more useful. There is so much data and information at the OMDC and so little of it is being made available. We really need more, and more relevant information.”* (Action Item E2)
- *“Last time I checked reports were outdated (older than three years) while you could find more up-to-date industry data from other sources.”* (Action Item E3)

Action Items

- E1. Provide website links to other significant research.
- E2. Create quarterly Research Bulletin and share deeper analysis.
- E3. Include Research and Business Intelligence tab on website and implement enhancements to the Online Research Library.

General Interactions and Communication

Summary

Overall Key Findings

- OMDC’s website and newsletter are most familiar to respondents with fewer than half of respondents being familiar with other communications and marketing materials. Respondents generally believe that that OMDC is doing a good job overall in their communications and marketing efforts, but social media use and promotion could be more effective, and more releases on topics of particular interest (i.e. industry specific publications), along with a less Toronto-centric focus, are desired. 

Communications Frequency

- Respondents generally believe that communication frequency is appropriate, but more releases on topics of particular interest (i.e. industry specific publications) are desired.

Communication Content and Materials

- While many respondents are neutral on OMDC’s marketing and communications materials, respondents feel an update to their presentation would be beneficial as it seen as “old-fashioned” and not “cutting edge”.  

Social Media

- Respondents perceive that OMDC is using social media less effectively than in 2011, and only 38% of respondents follow OMDC on Facebook and Twitter (with only 35% being open to following an Instagram page). Many respondents were unaware of OMDC’s social media presence, or felt that OMDC is not using it in an engaging manner that is aligned with what they’d like to see. Others believe that OMDC should leverage social media more for promotional/informative purposes.  

General Interactions and Communication

Summary, cont'd

Website

- OMDC's website shows opportunity for improvement, as only 63% of respondents were satisfied with its clarity and ease-of-use. Feedback also addressed areas for improvement with regards to navigation and visual appeal. 

Reception

- Over 80% of respondents are satisfied with the quality of interactions they have had with OMDC's reception desk; however they would prefer more consistent responses/call-backs to voicemails generally and dedicated inquiry lines.

French Language Services

- While only a small portion of respondents took the survey in French, only 47% of French respondents are satisfied with OMDC's French language service offerings. 

Accessibility

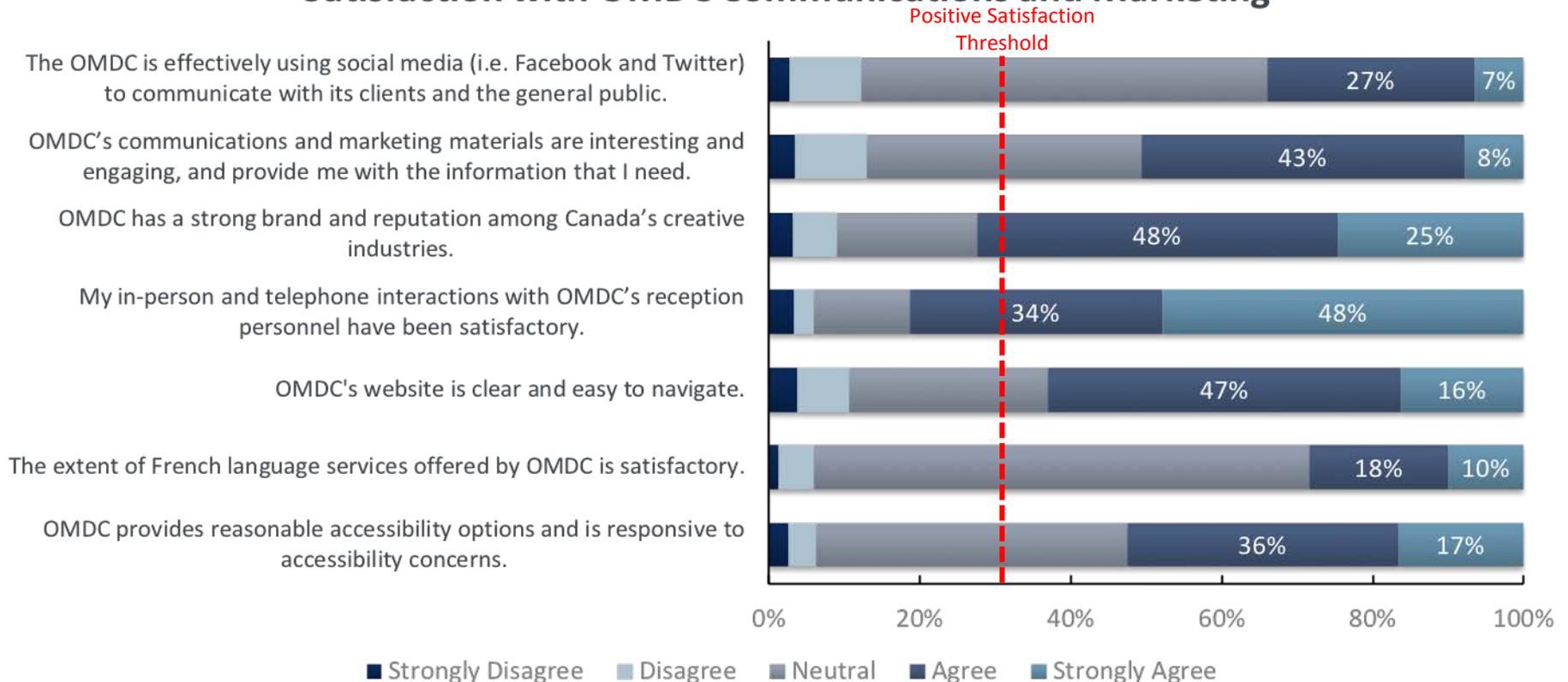
- Many respondents have not had to make use of OMDC's accessibility options and therefore cannot speak to them, but relevant feedback indicates that OMDC could improve communication of its accessibility options and the quality of these services. 

General Interactions and Communication

Communications and Marketing

OMDC's website and newsletter are most familiar to respondents, with fewer than half of respondents being familiar with other communications and marketing materials. Respondents generally believe that that OMDC is doing a good job overall in their communications and marketing efforts, but social media use and promotion could be more effective, and more releases on topics of particular interest (i.e. industry specific publications), along with a less Toronto-centric focus, are desired.

Satisfaction with OMDC Communications and Marketing



General Interactions and Communication

Communications and Marketing, cont'd

Action Items

- C2. OAP and Website are scheduled for refresh over next two years.
- F1. Offer mental health training for customer service to OMDC staff.
- G1. Include a French language Digital Dialogue Breakfast for Francophone audience.
- H1. Revise social media strategy and approach to include a social media specialist.
- H2. New name and brand refresh to be launched in 2018/19.
- H3. Create video stakeholder success stories and post on YouTube and social platforms.
- H4. Modernize all marketing materials as part of brand refresh.

Appendix I

Summary of Action Items

Issue A

Dissatisfaction with applicant eligibility, and application complexity, process and evaluation

Actions:

- A1. OMDC will continue to advise government on areas where eligibility requirements could be modernized and/or modified.
- A2. Program staff will track application requirement challenges to identify new or common issues.
- A3. Staff will investigate specific concerns to determine if eligibility criteria need to be clarified or revised.
- A4. Continue to provide written context and key feedback to all applicants.

Issue B

Dissatisfaction with timelines to process applications

Actions:

- B1. Continue to review process for streamlining.
- B2. Examine turnaround time within context of Film Fund evaluation.

Issue C

Comments made that Digital Locations Library, OAP and Website require an upgrade

Actions:

- C1. Digital Location Library upgrade was completed following Client Satisfaction Survey.
- C2. OAP and Website are scheduled for refresh over next two years.

Issue D

Comments made that OMDC Programs and Activities are "Toronto-centric"

Actions:

- D1. Will continue regional outreach sessions.
- D2. Continue to offer Digital Dialogue Breakfasts outside Toronto.
- D3. Ensure sponsored panels strive to have gender parity and diversity.

Summary of Action Items, cont'd

Issue E

Comments made that research is not timely, hard to find, and could provide more depth, and that session panels should reflect a broader range of experience

Actions:

- E1. Provide website links to other significant research.
- E2. Create quarterly Research Bulletin and share deeper analysis.
- E3. Include Research and Business Intelligence tab on website and implement enhancements to the Online Research Library.
- E4. Continue to include a broad and diverse range of topics, panelists and speakers for Digital Dialogue Breakfasts.

Issue F

Comments made that OMDC seems to lack expertise in serving people with differing cognitive abilities.

Actions:

- F1. Offer additional training for customer service to OMDC staff.

Issue G

Comments made that OMDC could serve francophone stakeholders better

Actions:

- G1. Include a French language Digital Dialogue Breakfast for Francophone audience.

Issue H

Comments made that Social Media needs to be more engaging and products modernized

Actions:

- H1. Revise social media strategy and approach to include a social media specialist.
- H2. New name and brand refresh to be launched in 2018/19.
- H3. Create video stakeholder success stories and post on YouTube and social platforms.
- H4. Modernize all marketing materials as part of brand refresh.

Appendix II

Management Response

- Slide 11 – Industry Trends: Summary. Success Drivers note “the importance of developing and nurturing talent and promoting Canadian content,” which is important; that said, OMDC is an economic development agency with a mandate to support company growth and employment in the creative industries – and that is what the majority of funding programs and initiatives focus on. Developing and nurturing talent is without question critically important, but it is a different business than the one presently engaged in.
- Slides 14, 16, 17, 18 – Business eligibility requirements and project eligibility requirements for tax credits are created by legislation and regulation. While it is clear that applicants have expressed dissatisfaction with the requirements, OMDC has no control over these legislative and regulatory requirements. OMDC has control over analysis time but not queue time, which is a function of the volume of products received.
- Slide 14, 15, 16, 17, 18 – Administrative requirements for applications has not increased in grant programs beyond those required by the Transfer Payment Accountability Directive (TPAD) and/or auditors. All grant programs are competitive and comparative (unlike tax credits, which are awarded if eligibility requirements are met) and are over-subscribed; in many grant programs not all worthy projects or companies will be funded – administrative adjustments will not alter that outcome.
- Slide 16 – Film Fund program reference to maximum funding levels being insufficient is feedback that is being offered in the context of sensitivity to program increases in interactive digital media and music sectors. While sector budget differentials are a pain point for stakeholders across the sectors, it appears that the feature film sector is particularly sensitive to this differential.

Management Response, cont'd

- Slide 17, 18 – Within Ontario Music Fund (OMF) and Interactive Digital Media (IDM) Fund specific program streams exist that facilitate development of smaller/emerging companies. These program streams were developed as an outcome of both sectors receiving a significant increase in program funding.
- Slide 21 – OMDC's Business Initiatives programming responds to requests for meetings with experienced Ontario content company executives to explore potential business collaboration. OMDC's programs are provided for Ontario companies (resident producers and/or publishers) to benefit from its business development initiatives.
- Slide 23 – The Film Commission has recently updated and redesigned the Locations Library website interface to provide an intuitive and fluid user experience. The refreshed website was launched shortly after the survey closed; comments received in the survey relate to the old website. The Library Team will continue to update images and offer training sessions in specific regions for photographers to take location shots. Ottawa, Kingston and Sudbury locations were recently refreshed by OMDC photographers and are being processed for release.