



CSI FINANCE STUDY

Our path towards financial excellence.

An Overview of CSI Financial

The Customer Satisfaction Index Financial study (CSI Financial) is an ongoing syndicated relationship survey on personal banking in Canada. This survey was first launched in 1987 and was revamped in 2018 to become more relevant, more forward thinking and offer more analytics.

A better understanding of customer relationships with Canadian banks

Canadian banking customers rate their primary and secondary financial institution's performance against a comprehensive range of experience benchmarks, including Likelihood to Recommend (NPS), banking channels experience, financial advice and the emotional connection customers have with each financial institution. Subscribers include Canada's Big 5 Banks, Credit Unions and other various national and regional financial institutions.



HOW WE DO IT

Online Methodology

Data collection is gathered on a weekly basis and runs for a total of 44 weeks, between November to mid-September each year.

Robust Sample

There are around 48,000 completes, and 72,000 financial institutional ratings nationally per fiscal year.

DATA COLLECTION

WAVE	1	NOV / DEC / JAN
	2	FEB / MAR / APR
	3	MAY / JUN / JUL
	4	AUG / SEP

Financial Service Excellence Awards



Based on CSI Financial results each year, the Ipsos Excellence in Financial Services Awards are announced in October after wave 4, honouring Financial Institutions who achieve top ratings for customer experience across eleven personal banking award categories. Specific qualification criteria apply for the awards.

HOW DO I PURCHASE THE STUDY?

Contact us to learn more about the study.

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