



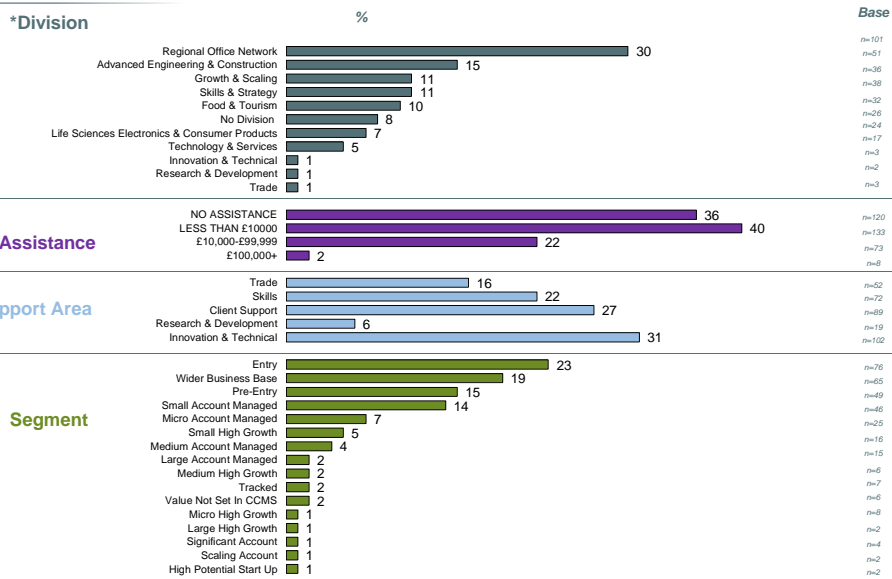
Methodology

- In conducting this research a telephone methodology was employed. The 10 minute questionnaire had been utilised for many years and remained consistent to enable comparisons with previous waves.
- Throughout the fieldwork period, Millward Brown interviewers worked under direct supervision, with approximately 10% of all interviews being monitored by the Call Centre manager using remote 'listening in' facilities. This process ensures that the quality and consistency of interviewing is maintained at all times, fully complying with the standards enshrined within IQCS (Interviewer Quality control Scheme). During each shift, interviewers provided feedback on an ongoing basis so any issues arising could be resolved and dealt with in real time.
- All research conducted in compliance with the International Standard ISO 20252:2012.

Sample

- Some 334 interviews were completed, 155 of these were Account Managed Customers and 100 were Regional Office Customers, all who accepted a letter of offer or support between July and September 2015. A sample of 79 were the Wider Business Base who had some form of interaction with Invest NI between July and September 2015. Of the 334 participating customers and WBB, 220 Customers and 65 WBB agreed to their responses being attributable. These responses have been provided in a separate report.
- Within this report, top line scores for Account Managed Customers, Regional Office Customers and WBB are illustrated for comparison purposes.
- The data has also been broken down by level of financial assistance and support area (grant support and programme support).
- Caution should be applied when comparing some of the results due to the very small base sizes involved in some instances. They should be seen as indicative rather than conclusive.
- For example, in Q2 2015, 334 interviews were conducted so when analysing results by level of financial assistance base sizes can drop as low as 8 (those receiving £100,000+).

Analysis of Sample



*1 company from International Investment

Technical Note

- **NOTE:** In some instances there may be a difference of 1% between the figures depicted on the charts and in the commentary e.g. 45% agree strongly, 45% agree slightly, but the overall agreed figure is 100%. This is due to a rounding of decimal places. In this example, the original results may have been 44.6% and 44.6% thus each rounded up to 45%. When combined this equals 100.2%, which is presented as 100%.

Executive Summary (1) – Customers

Key Performance Indicators

- In Q2 2015, satisfaction with overall service received remained high across the total sample with just over 9 in 10 (91%) claiming to be satisfied. Within this, almost two thirds (64%) were 'very satisfied' with Invest NI overall. These satisfaction results are consistent with Q1 trends.
- Overall satisfaction levels were high among Account Managed Customers with more than 9 in 10 (93%) customers expressing satisfaction with the service provided and over 3 in 5 (63%) of those stating that they were 'very satisfied'. This is an increase in overall satisfaction among Account Managed Customers from Q1 (88%).
- Overall levels of satisfaction among Regional Office Customers has fallen slightly from Q1 (89% from 92%), however in contrast, there has been a slightly higher proportion of customers falling into the 'very satisfied' category (66% from 64%).
- Satisfaction levels among WBB customers has fallen from Q1 (88% from 92%), with just over 3 in 5 (63%) expressing strong satisfaction, much lower than the proportion of WBB stating they were very satisfied in Q1 (76%).
- Consistent with Q1 trends, levels of satisfaction remained high across the support areas with Grant Support continuing to achieve the highest mean satisfaction score (4.67 out of a possible 5) compared with those receiving Programme Support (4.49 out of a possible 5).

Executive Summary (2) – Customers

Key Performance Indicators

- In Q2 2015, advocacy levels remain high with almost 9 in 10 (89%) customers stating they would speak highly of Invest NI (87% in Q1).
- Advocacy levels were similarly high across Account Managed (90%) and Regional Office (89%) customers with more than half (54%) of Account Managed customers stating they would speak highly without being asked and almost 3 in 5 (58%) Regional Office customers stating they would do the same. Overall advocacy among WBB was slightly lower (86%) than the other segments and also lower than those recorded in Q1.
- Levels of advocacy were slightly higher among customers receiving Grant Support (4.53 out of a possible 5) as opposed to Programme Support (4.35 out of a possible 5) – consistent with Q1 trends.
- Invest NI achieved a Net Promoter Score of +67 in Q2 2015, recording a slight improvement on Q1 (+65). The Net Promoter Score is highest among Regional Office Customers (+70), rising from +65 in Q1. The Net Promoter Score recorded a significant improvement from Q1 rising from +56 to +68, while the Net Promoter Score among WBB fell from +75 to +68.

Executive Summary (3) – Customers

- Almost 9 in 10 (87%) customers agreed that Invest NI was helping to develop their business, a slight increase from Q1 (84%). Agreement remains highest among Account Managed Customers (90%), while agreement among Regional Office Customers (87%) has increased from Q1 (78%). In contrast however, agreement among WBB (81%) has dropped since Q1 (85%).
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was again achieved among those receiving grant support (4.63) compared to programme support (4.43), both of which have increased slightly from Q1.
- Over 9 in 10 (95%) Customers agreed that Invest NI acts with professionalism and integrity, a slight increase from Q1, and with three quarters (75%) of customers strongly agreeing with this sentiment. Agreement was highest among Account Managed customers with almost all (98%) customers agreeing, rising from trends recorded in Q1 (92%). Agreement was equal among Regional Office and WBB customers (93%) with agreement among WBB remaining consistent with Q1 trends and agreement among Regional Office customers recording a slight decline from Q1 (96%).
- Mean scores across those in receipt of grant support (4.78 out of 5) continued to be higher than those receiving programme support (4.7 out of 5), however the mean score among grant support customers did fall back slightly over the period from 4.82 in Q1.
- More than three quarters (77%) of customers were in agreement that Invest NI exceeded their expectations, a marginal increase from Q1 (76%). Agreement among Account Managed customers has remained consistent and increased among Regional Office customers (80% in Q1 from 73% in Q1) while agreement has declined among WBB (79% in Q2 from 82% in Q1).

Executive Summary (4) – Customers

- More than four fifths (85%) of customers agreed that Invest I delivered value to their business, a marginal decrease from Q1 (86%), with agreement among Account Managed customers remaining consistent (89%), increasing among Regional Office customers (87% in Q2 from 82% in Q1) and decreasing among WBB (80% in Q2 from 87% in Q1).
- Some 7 in 10 (70%) customers agreed that they received information on additional support programmes that are available from Invest NI, a fall back from Q1 (73%). Agreement regarding receiving information on additional support decreased across both Regional Office customers (69% in Q2 from 73% in Q1) and WBB (61% in Q2 from 72% in Q1) while agreement increased among Account Managed customers (76% in Q2 from 73% in Q1).
- More than four fifths (85%) of customers were in agreement that a realistic timescale was discussed and agreed for planned activities. There was a slight decrease in agreement from Q1 overall (87%), and among Regional Office customers (86% in Q2 from 87% in Q1). Agreement among WBB remained consistent from Q1 (80%), while agreement among Account Managed customers (86%) increased marginally from Q1 (84%).
- In terms of being treated fairly, over the period agreement remained very high (95% in Q2). Agreement is highest among Account Managed customers with almost unanimous agreement (97%) compared with Regional Office customers (92%) and WBB (95%).

Executive Summary (5) – Customers

Key Drivers of Satisfaction

- A key drivers' analysis conducted on the monthly survey data (at beginning of the contract) revealed the seven top drivers of satisfaction were:
 - Helping to develop customers' businesses;
 - Delivering value to customers' businesses;
 - Tailoring solutions to meet business needs;
 - Satisfaction with Client Executive;
 - Discussing and agreeing a realistic timescale for planned activities;
 - Responding to queries in a reasonable timeframe; and
 - Being clear at the start if and how Invest NI could help customers' businesses.
- In Q2 2015, all key drivers of satisfaction achieved a mean score of no less than 4.41 out of a possible 5. The top rated drivers for Q2 included; satisfaction with the Client Executive (4.73) and responding to queries in a reasonable timeframe (4.61).

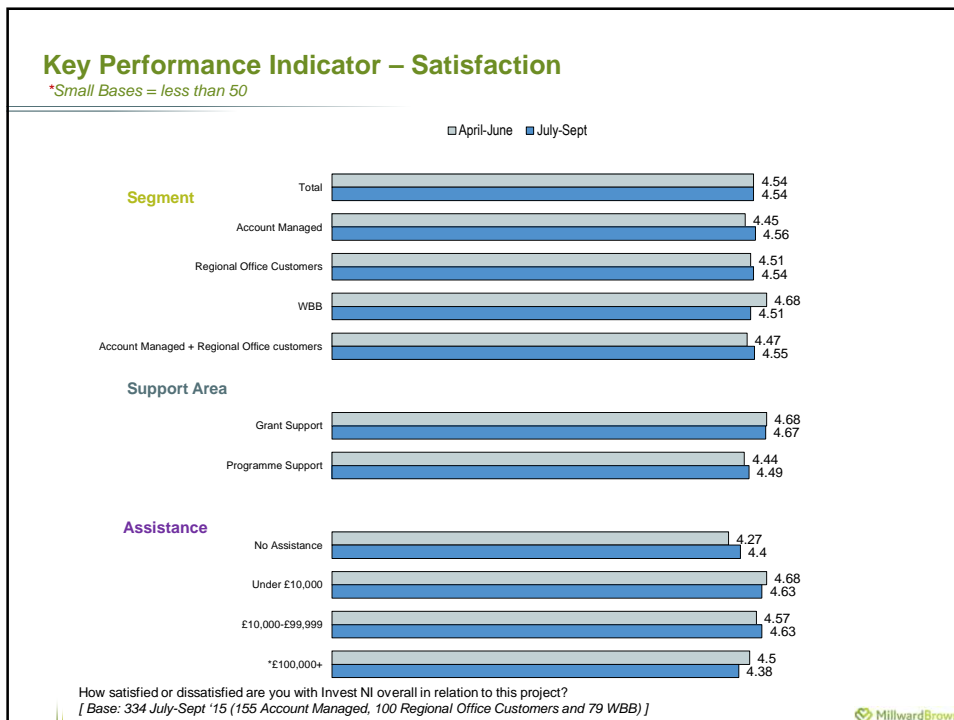
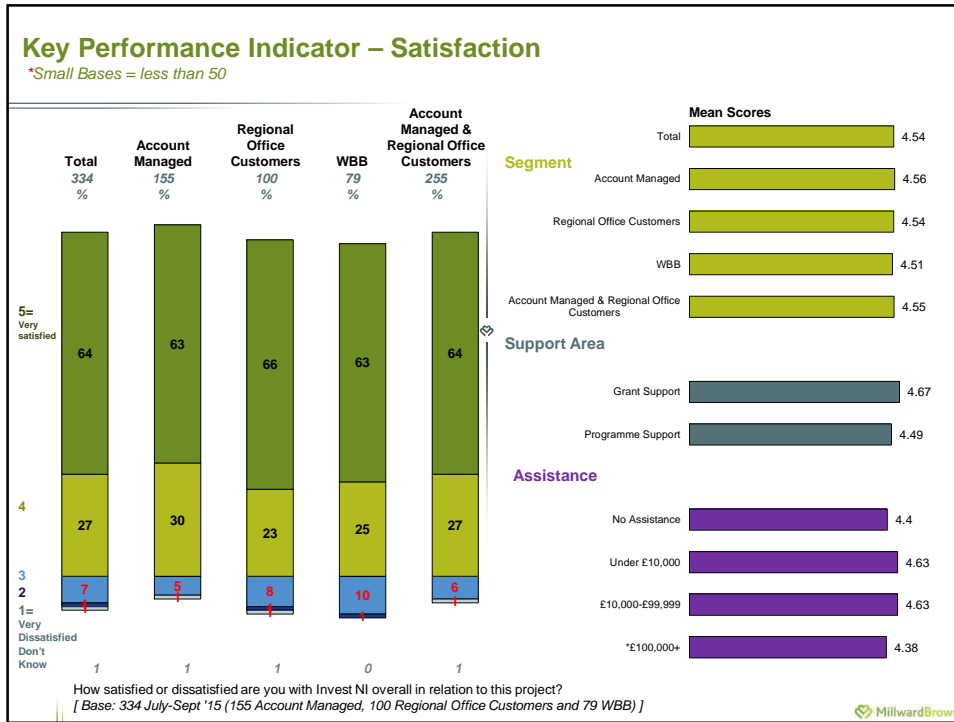
Executive Summary (6) – Customers

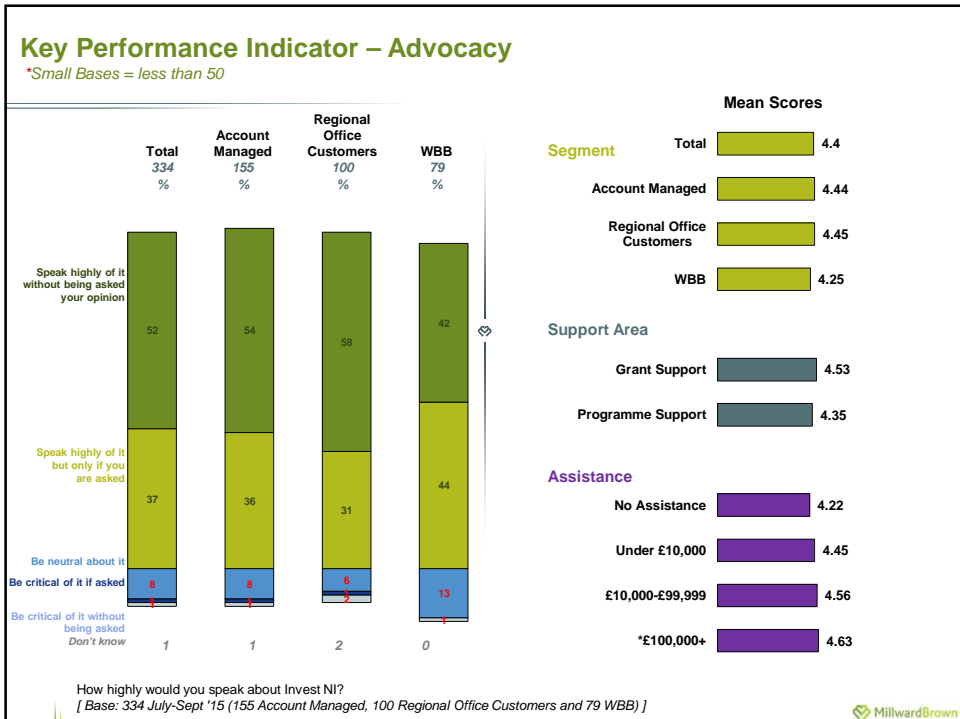
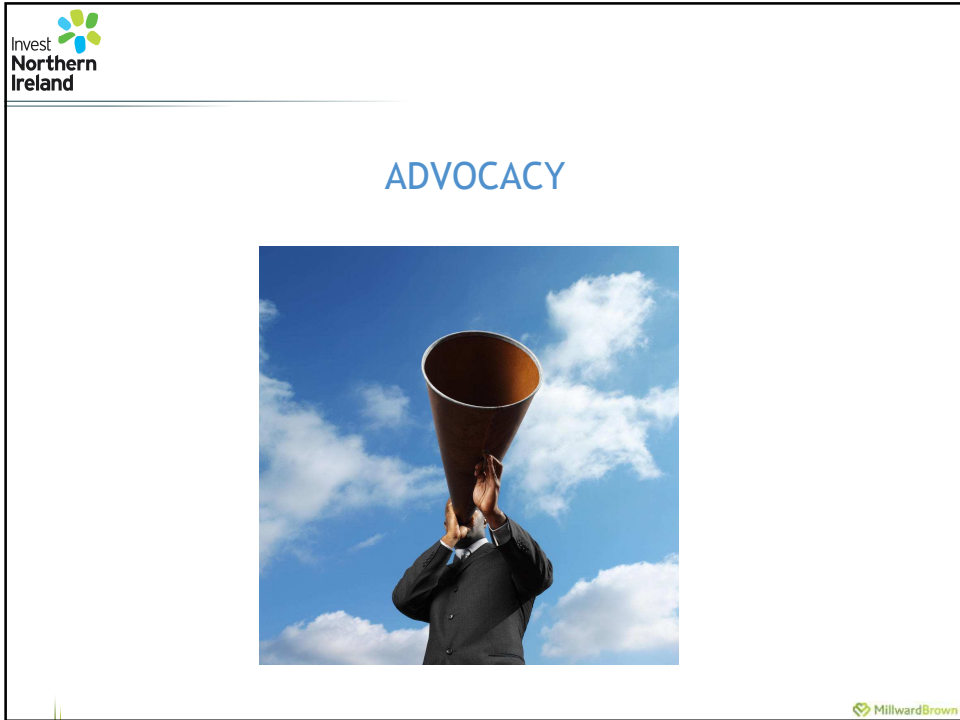
Detailed Performance Measures

- In Q2 2015, the average mean score for overall performance was 4.48 out of a possible 5.
- All performance areas achieved a mean score of no less than 4.37 out of a possible 5.
- The strongest performing areas were clear communication (4.65) and responding to queries in a reasonable timeframe (4.61).
- The weaker aspects of the engagement included understanding of business needs (4.37) and tailoring responses to the needs of the business (4.41).
- The mean score for the overall performance by segment were as follows:
 - Account Managed customers = 4.50
 - Regional Office customers = 4.44
 - Wider Business base = 4.44

SATISFACTION

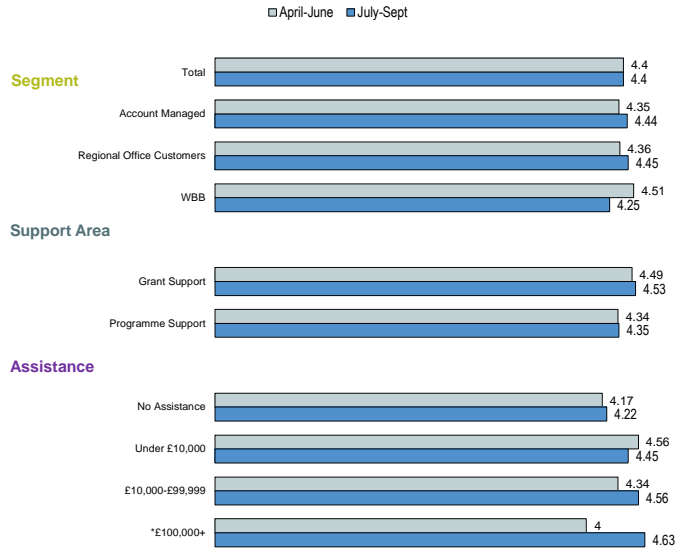






Key Performance Indicator – Advocacy

*Small Bases = less than 50

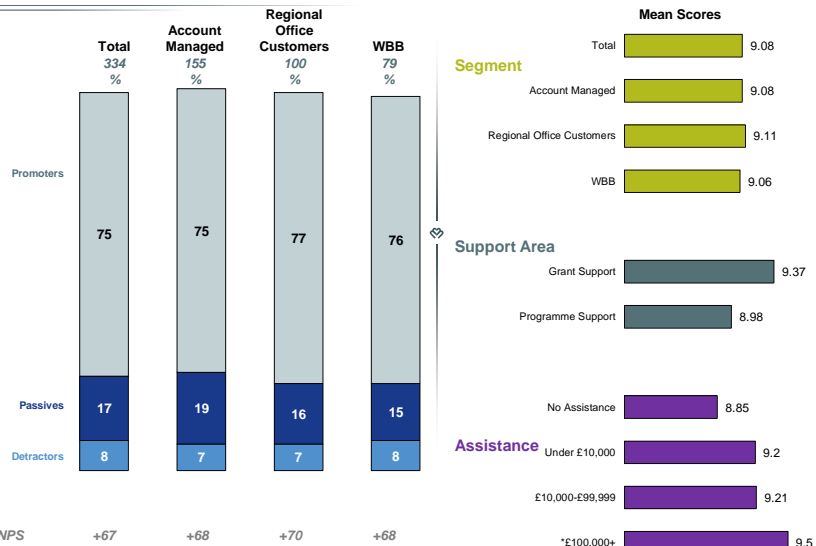


How highly would you speak about Invest NI?
 [Base: 334 July-Sept '15 (155 Account Managed, 100 Regional Office Customers and 79 WBB)]



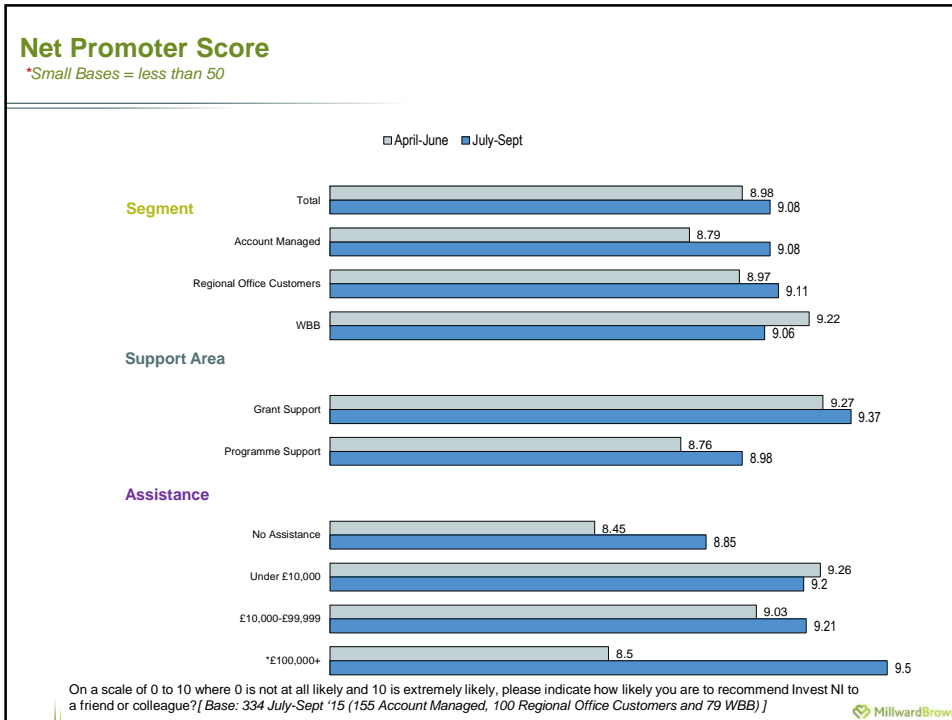
Net Promoter Score

*Small Bases = less than 50



On a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely, please indicate how likely you are to recommend Invest NI to a friend or colleague? [Base: 334 July-Sept '15 (155 Account Managed, 100 Regional Office Customers and 79 WBB)]



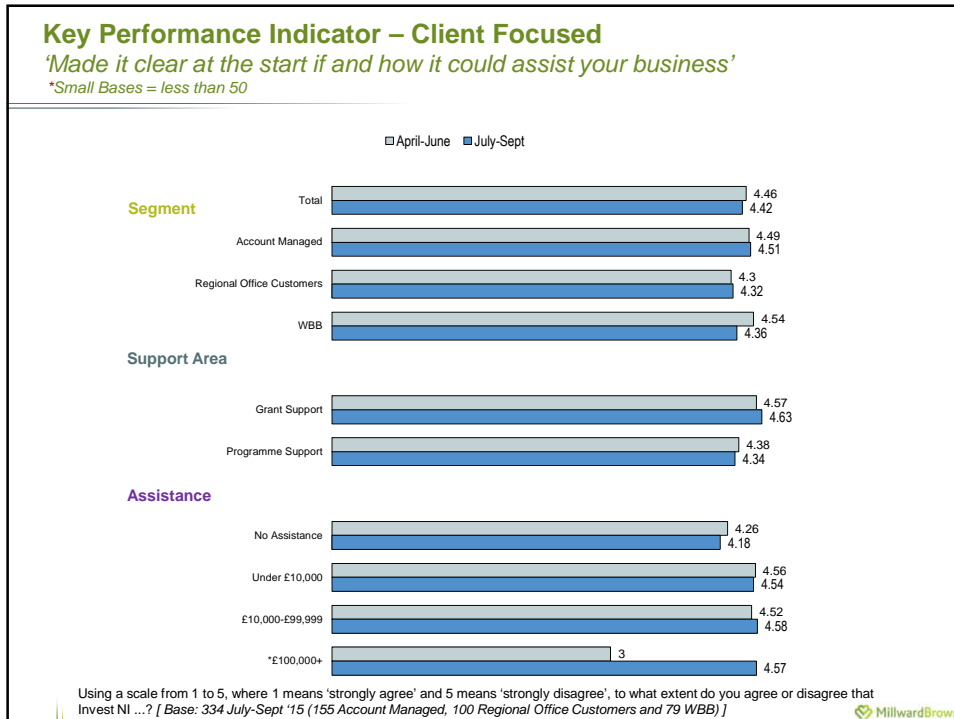
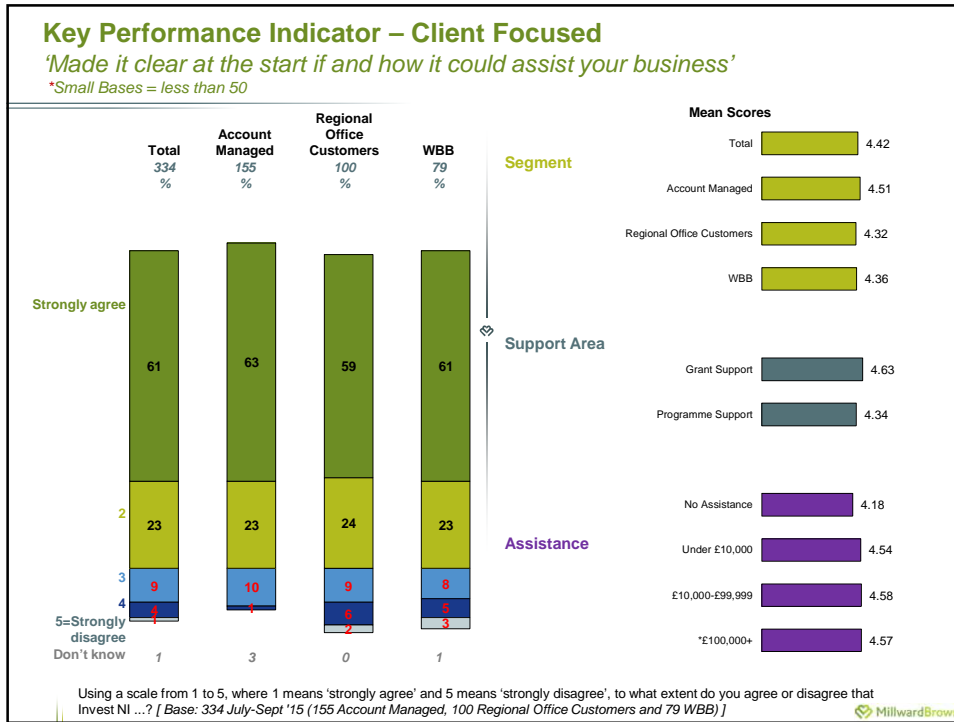


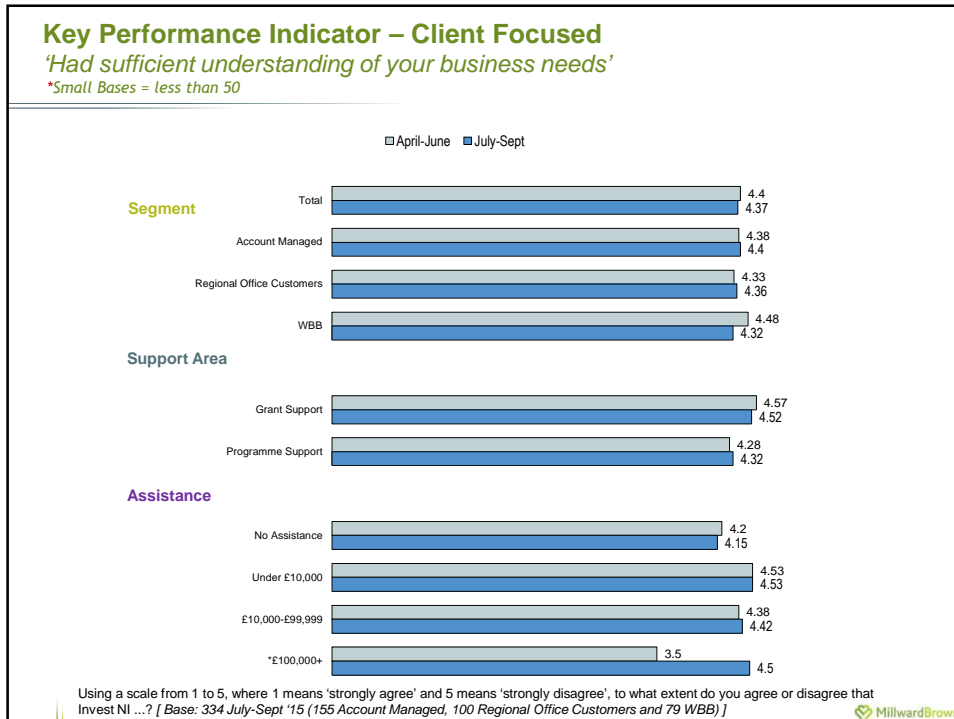
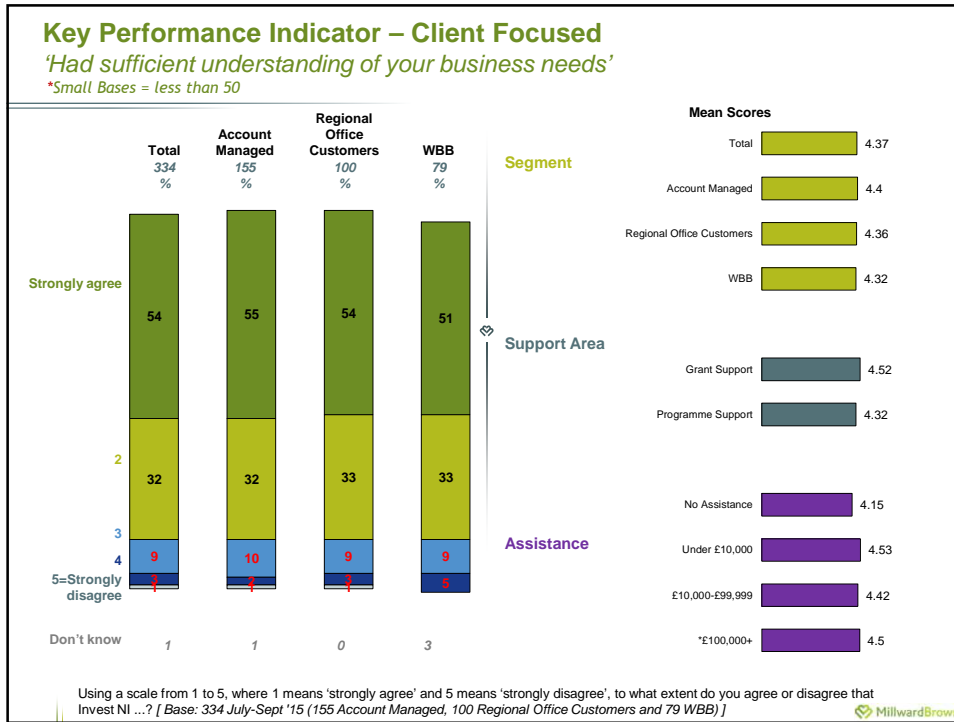
Invest Northern Ireland

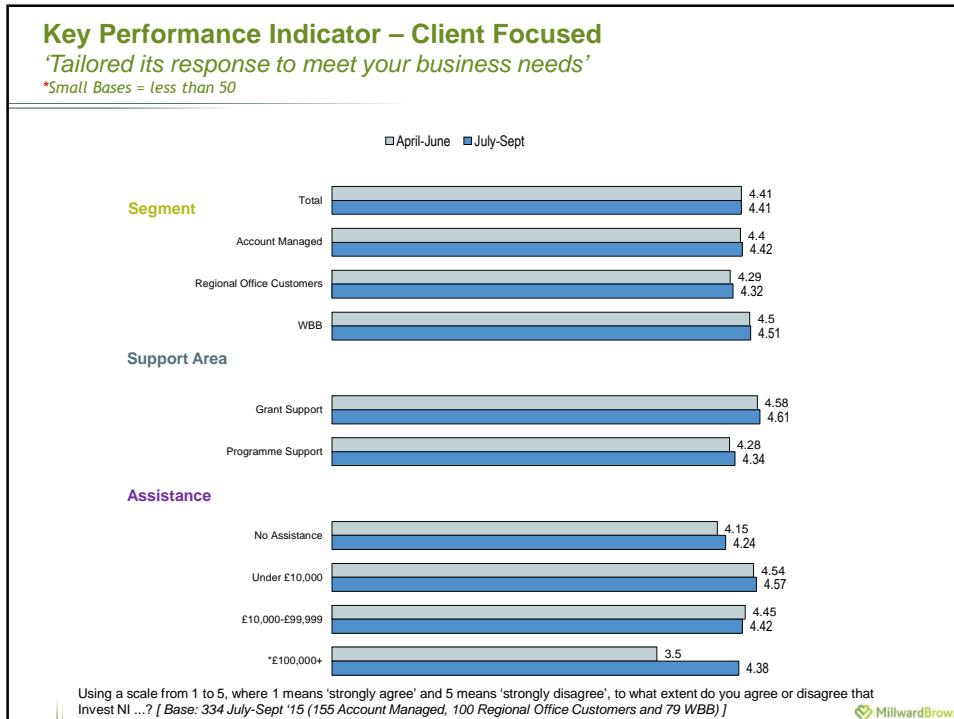
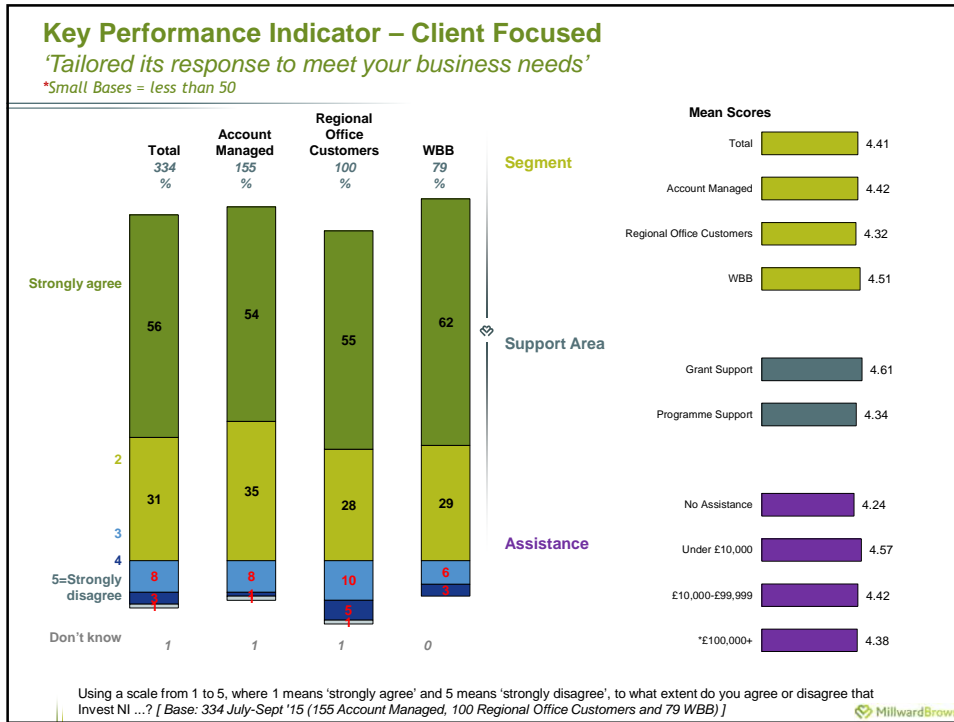
CLIENT FOCUSED

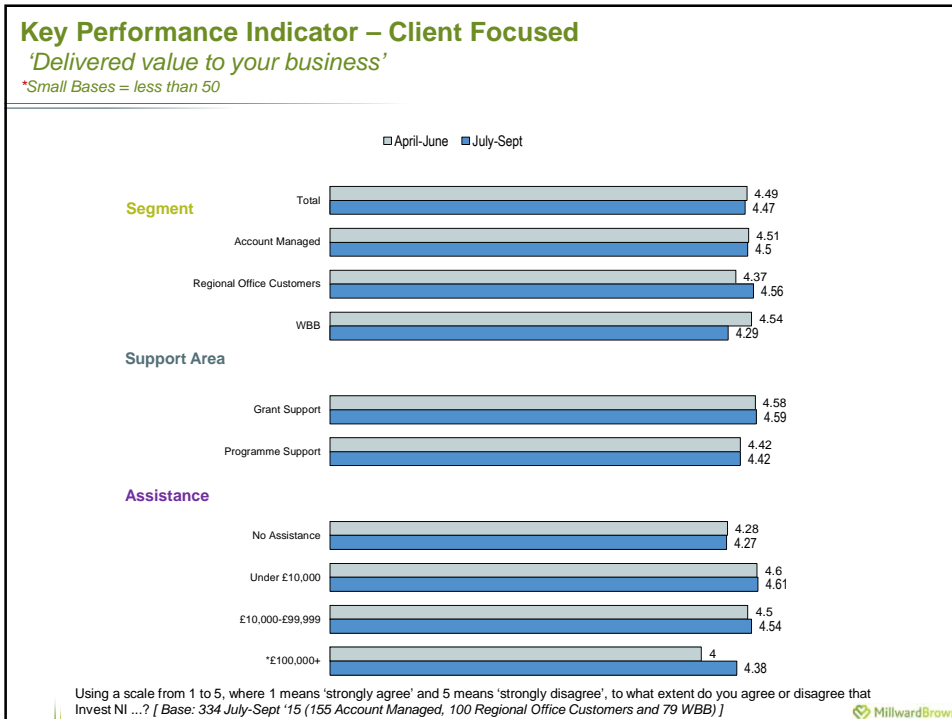
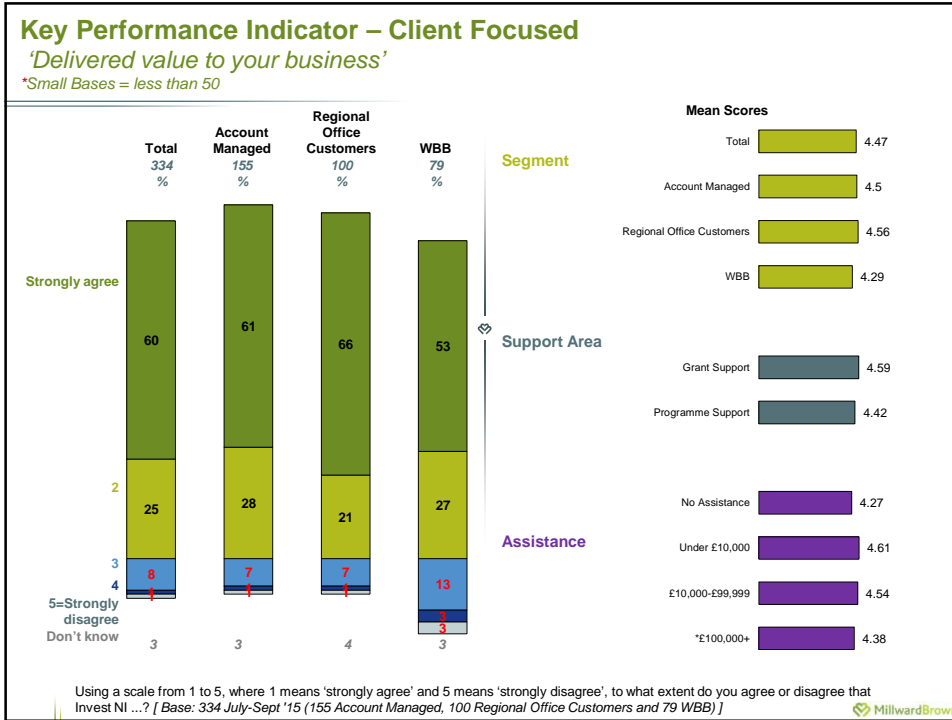
IT'S ABOUT YOU

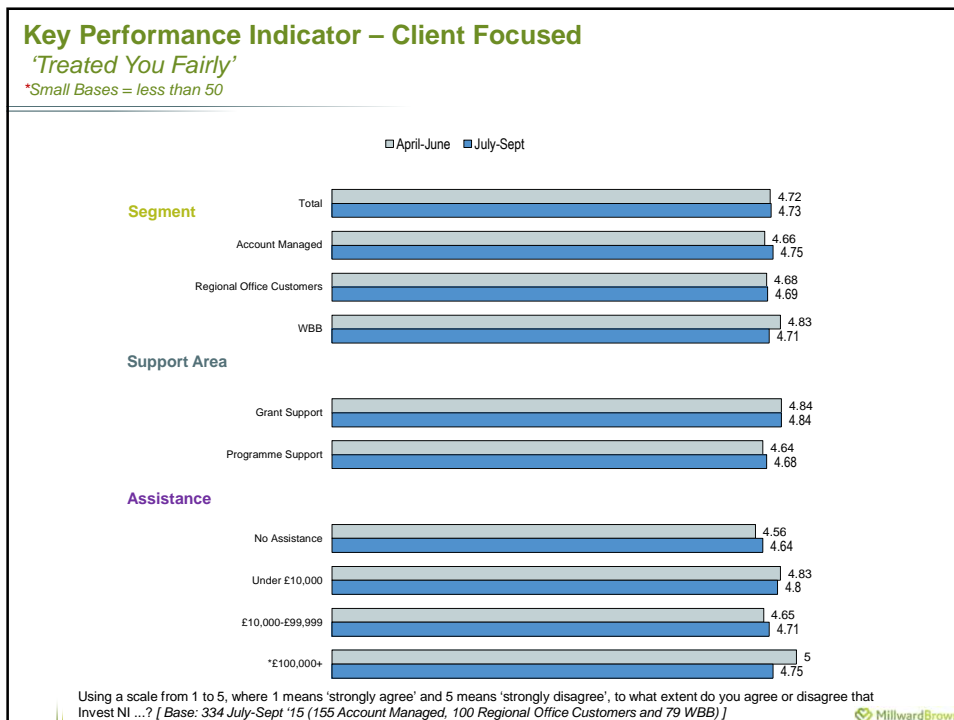
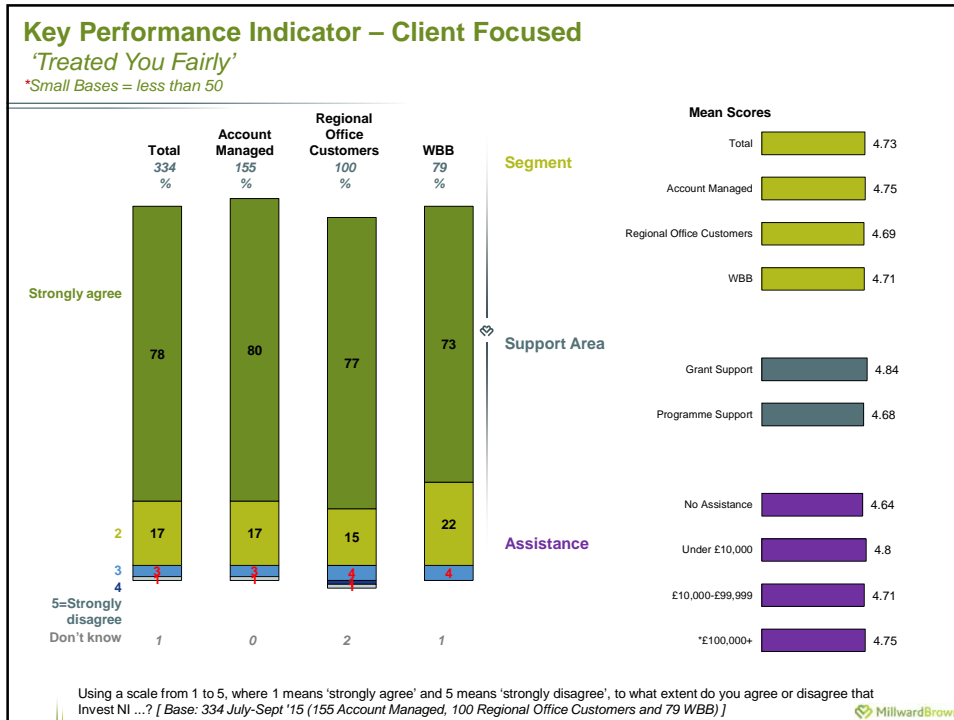
MillwardBrown

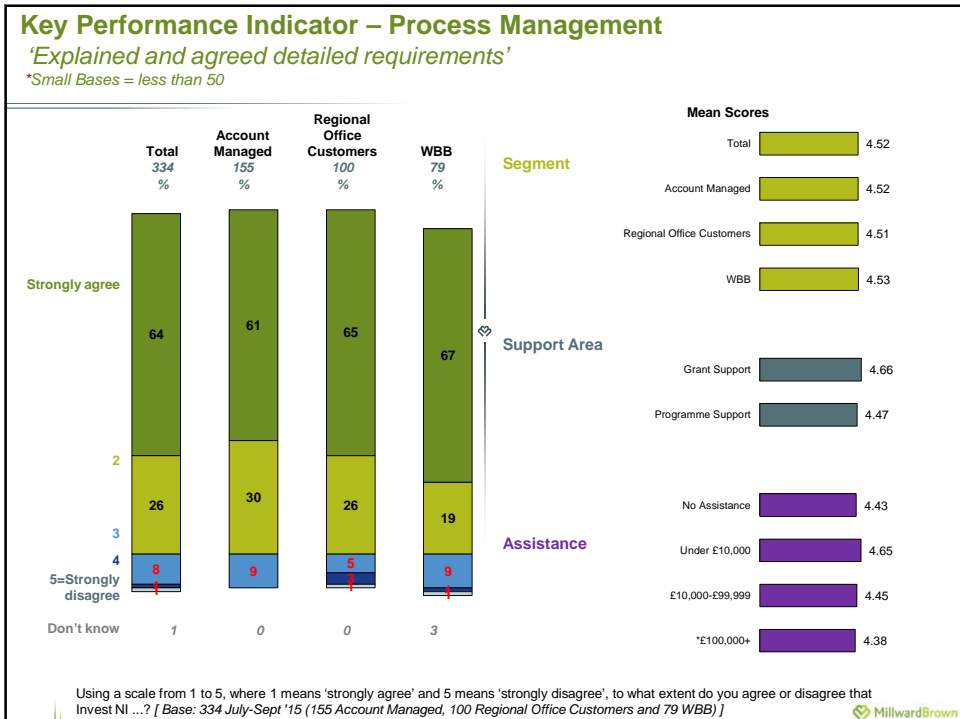
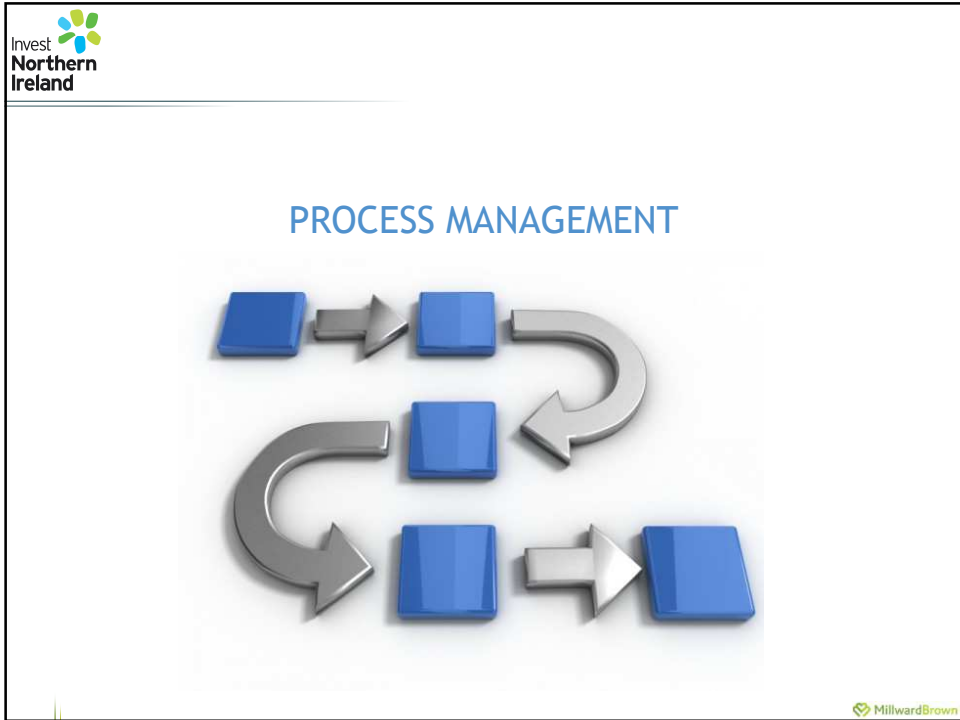








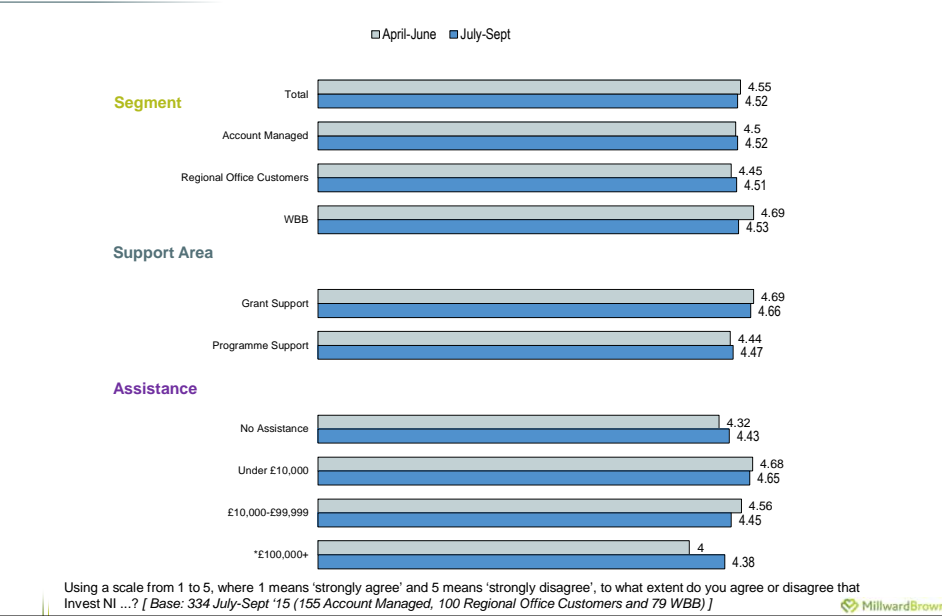




Key Performance Indicator – Process Management

'Explained and agreed detailed requirements'

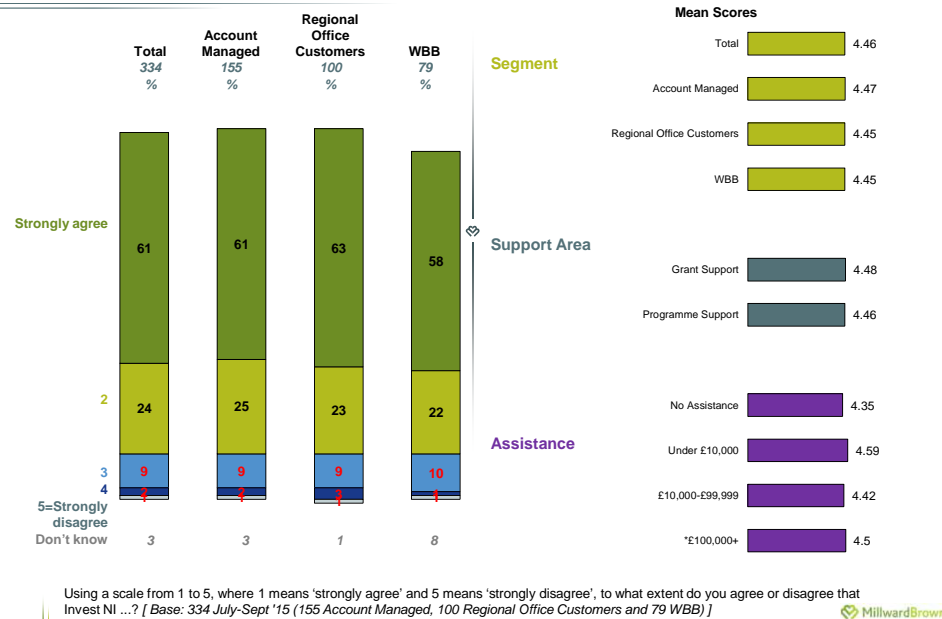
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Key Performance Indicator – Process Management

'Discussed and agreed a realistic timescale for planned activities'

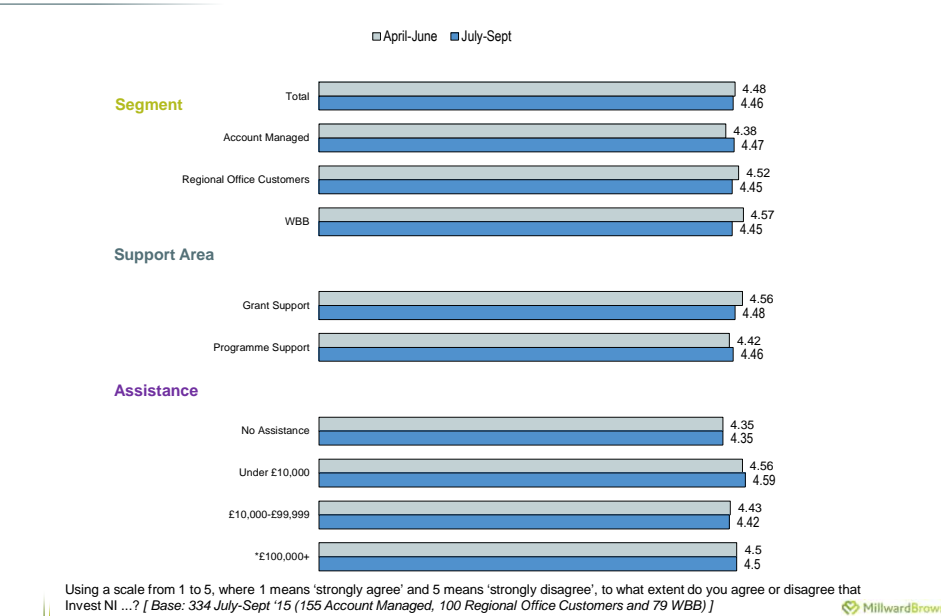
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Key Performance Indicator – Process Management

'Discussed and agreed a realistic timescale for planned activities'

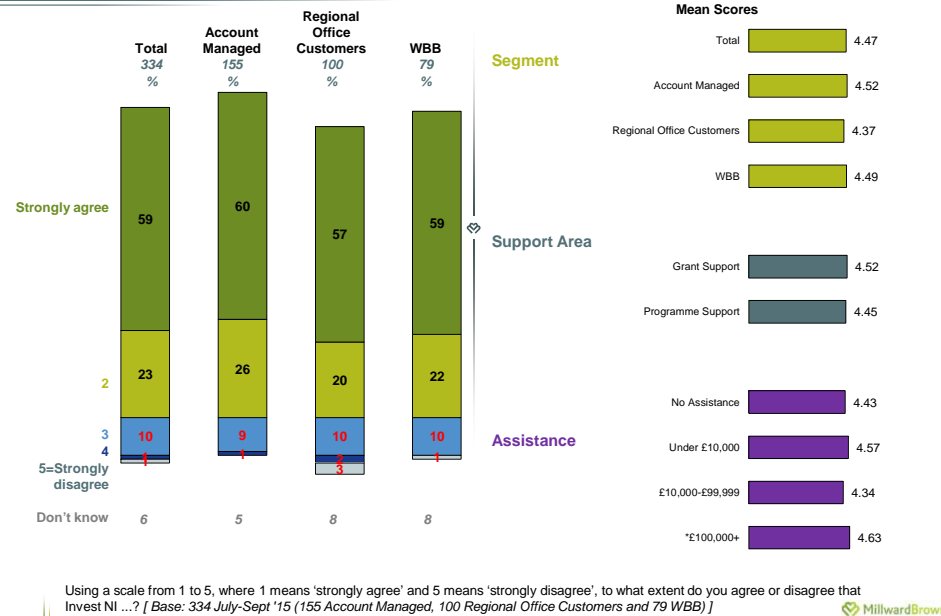
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Key Performance Indicator – Process Management

'Completed activities according to the agreed timeline'

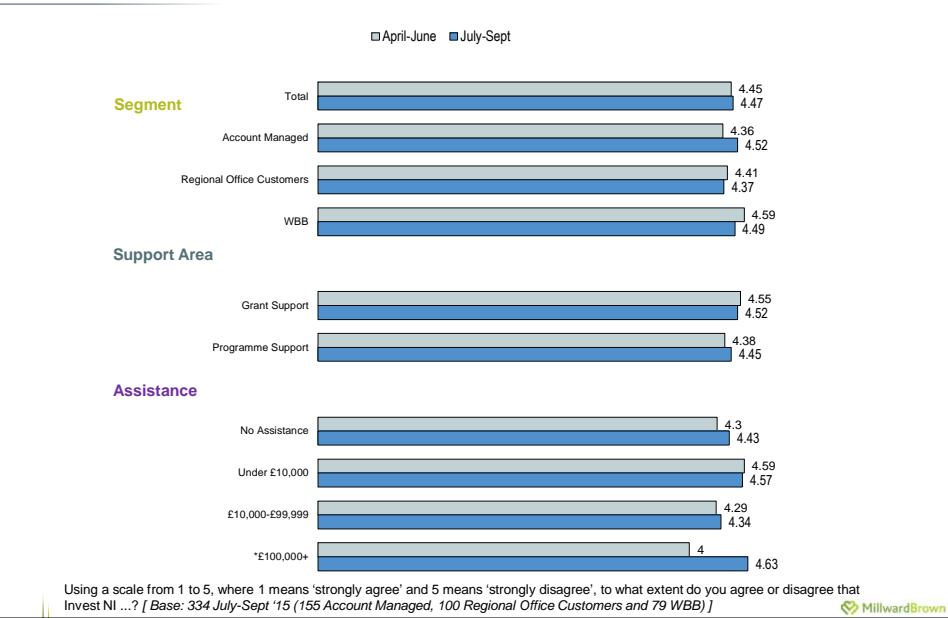
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Key Performance Indicator – Process Management

'Completed activities according to the agreed timeline'

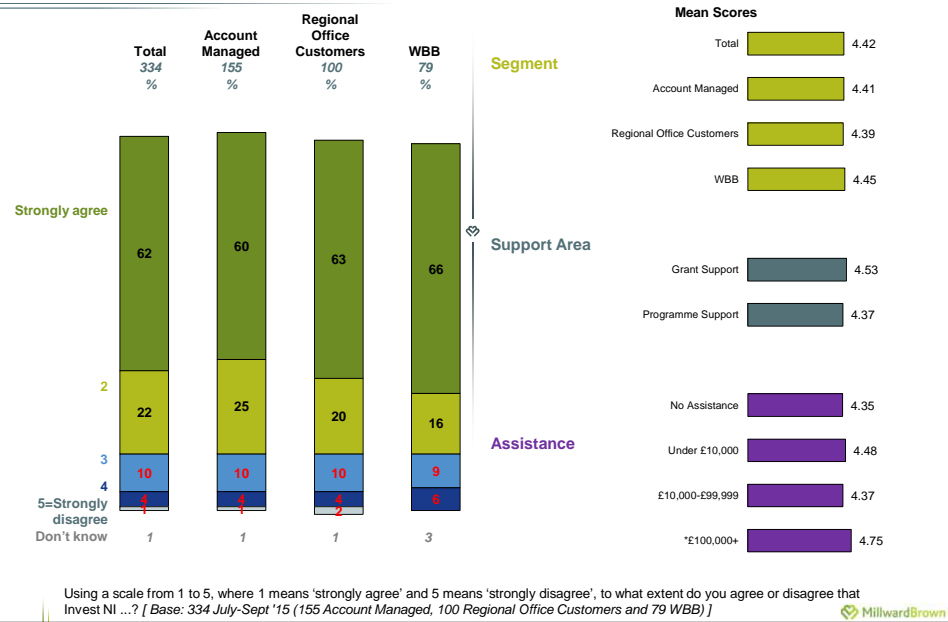
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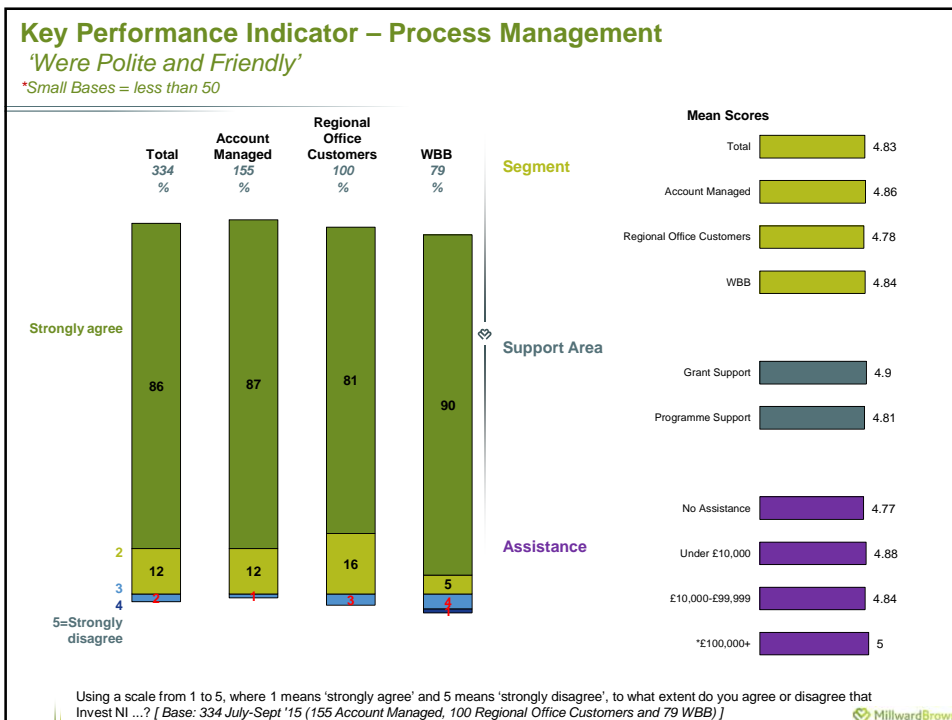
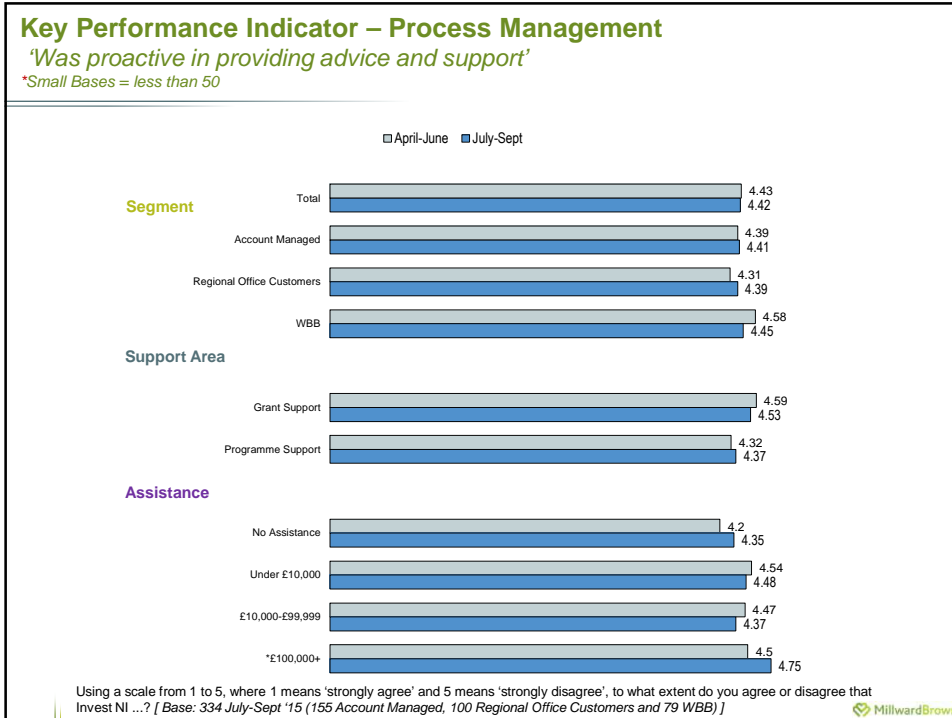


Key Performance Indicator – Process Management

'Was proactive in providing advice and support'

**Small Bases = less than 50*

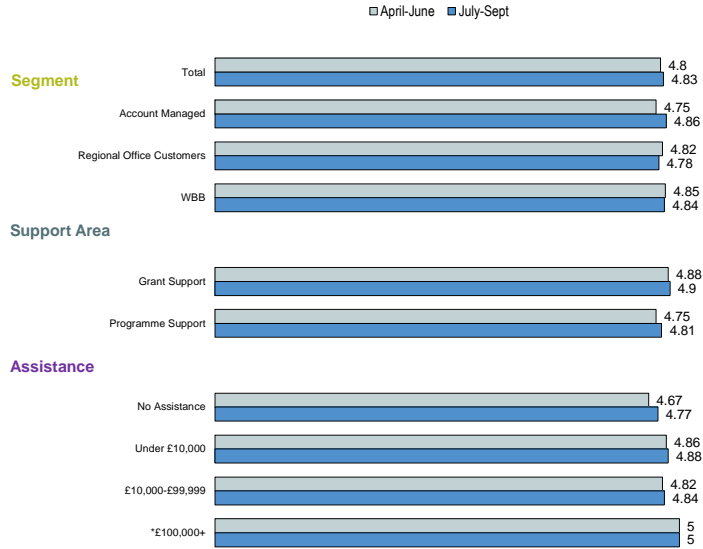




Key Performance Indicator – Process Management

'Were Polite and Friendly'

**Small Bases = less than 50*

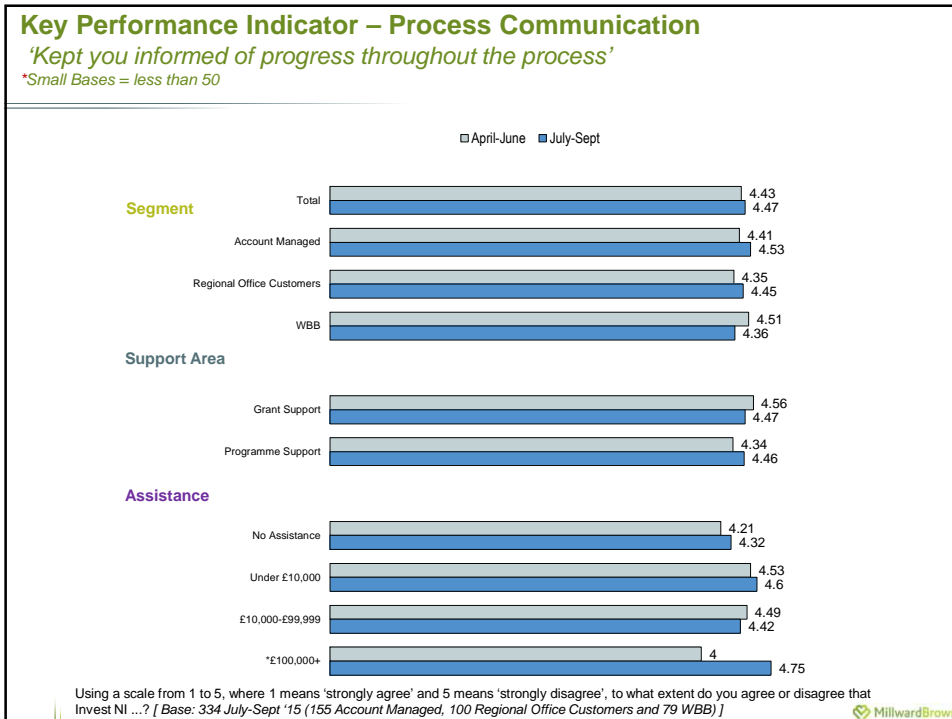
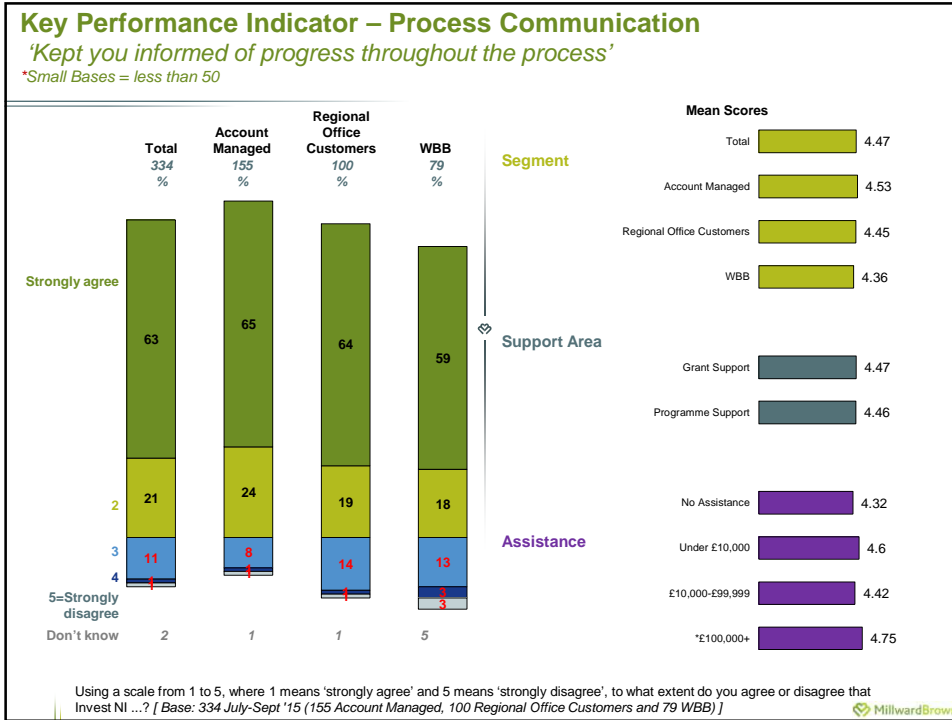


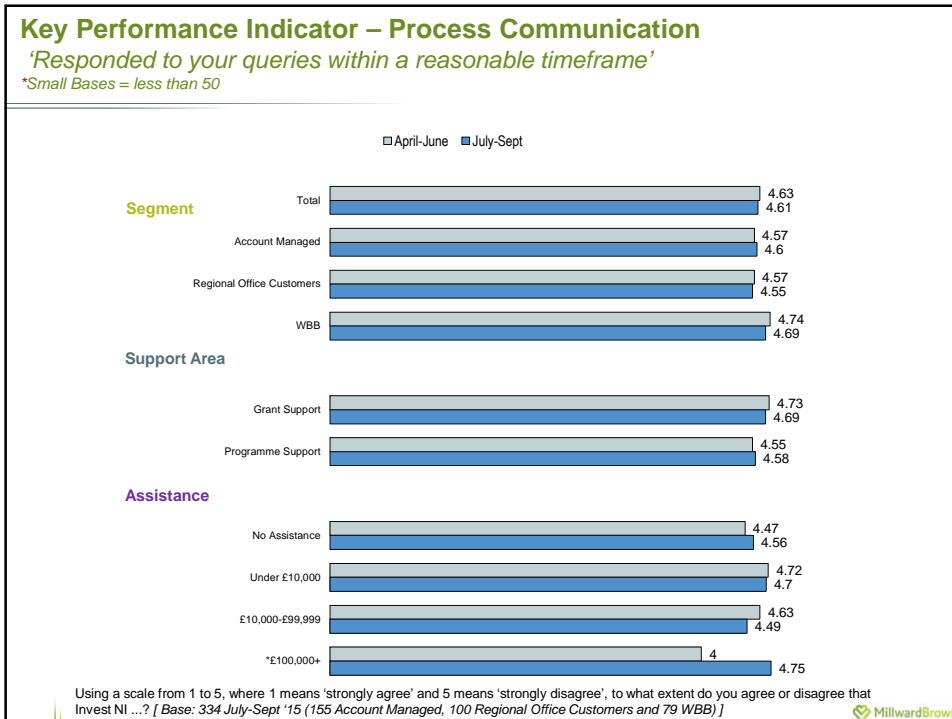
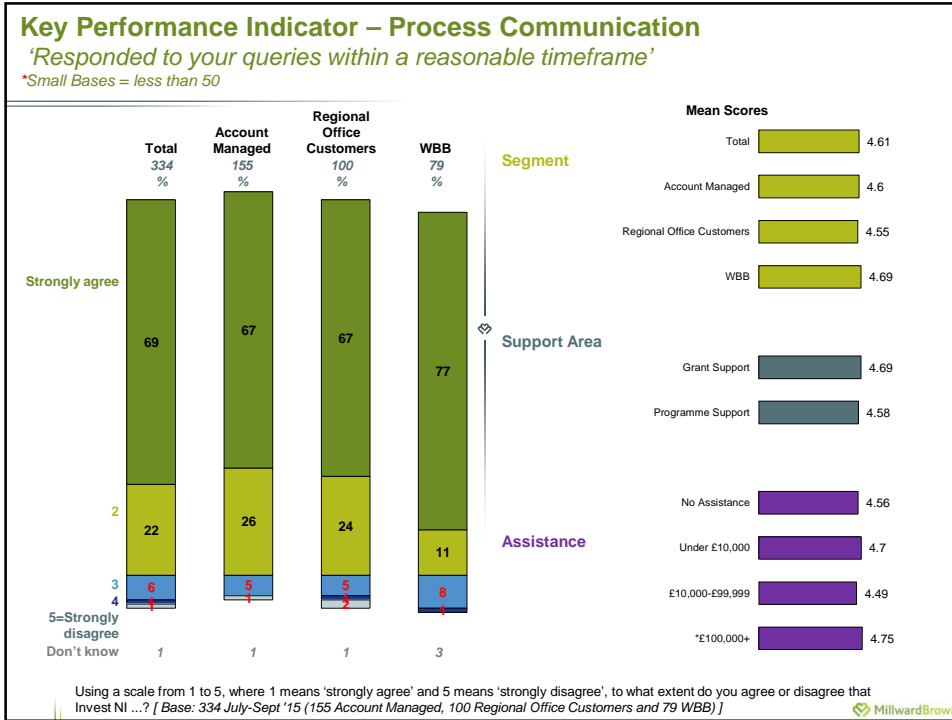
Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 334 July-Sept '15 (155 Account Managed, 100 Regional Office Customers and 79 WBB)]

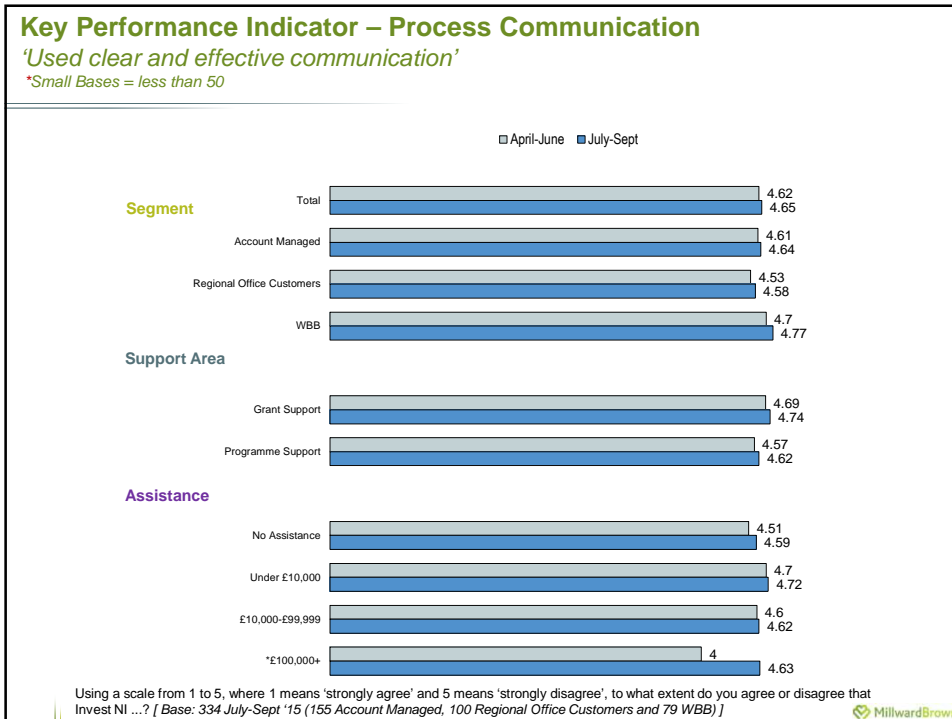
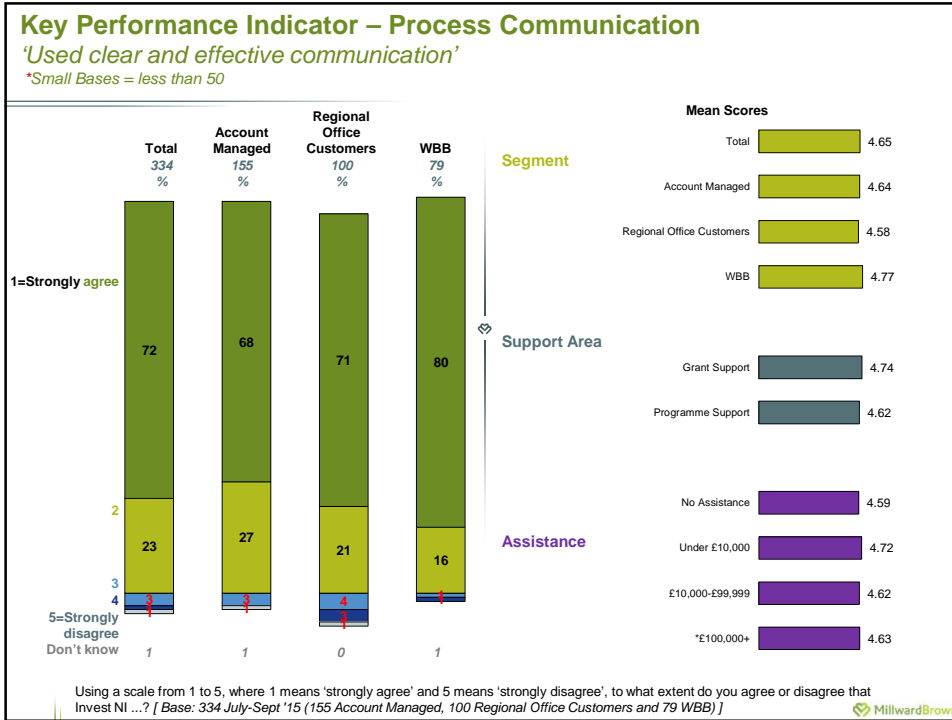


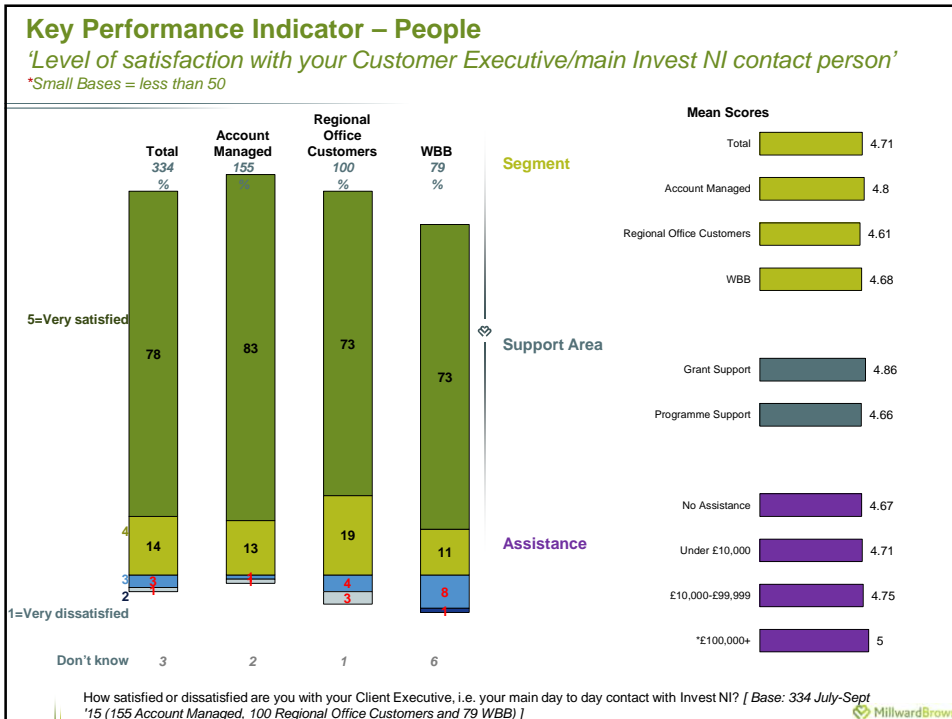
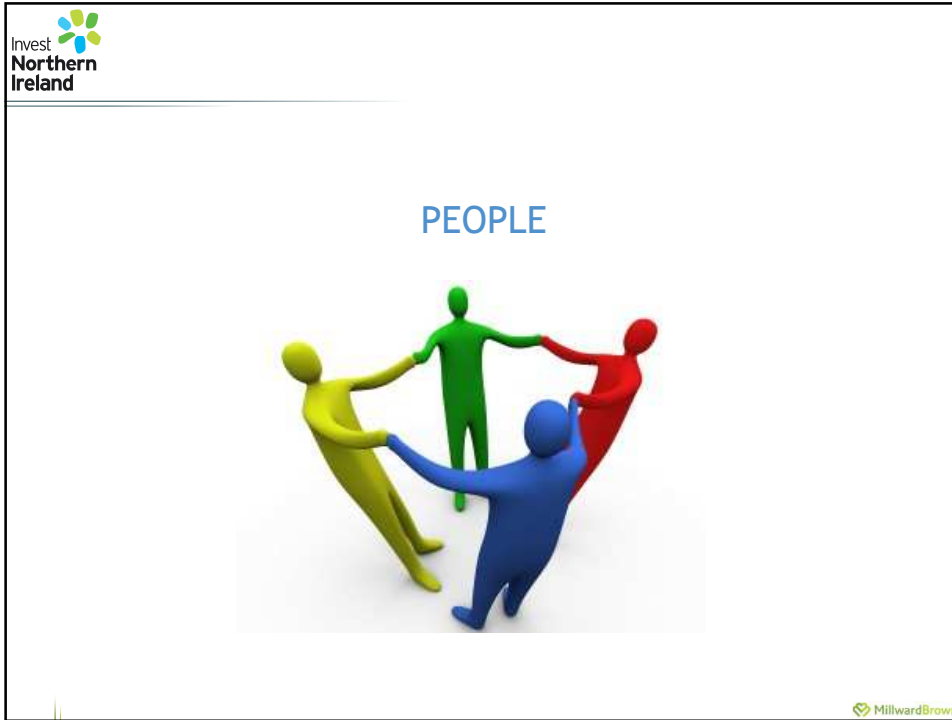
PROCESS COMMUNICATION







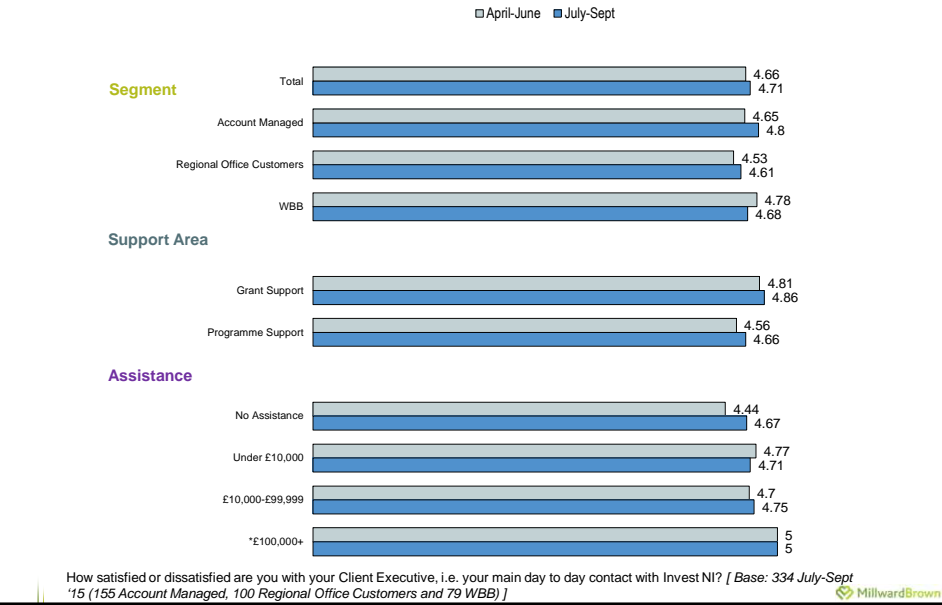




Key Performance Indicator – People

'Level of satisfaction with your Customer Executive/main Invest NI contact person'

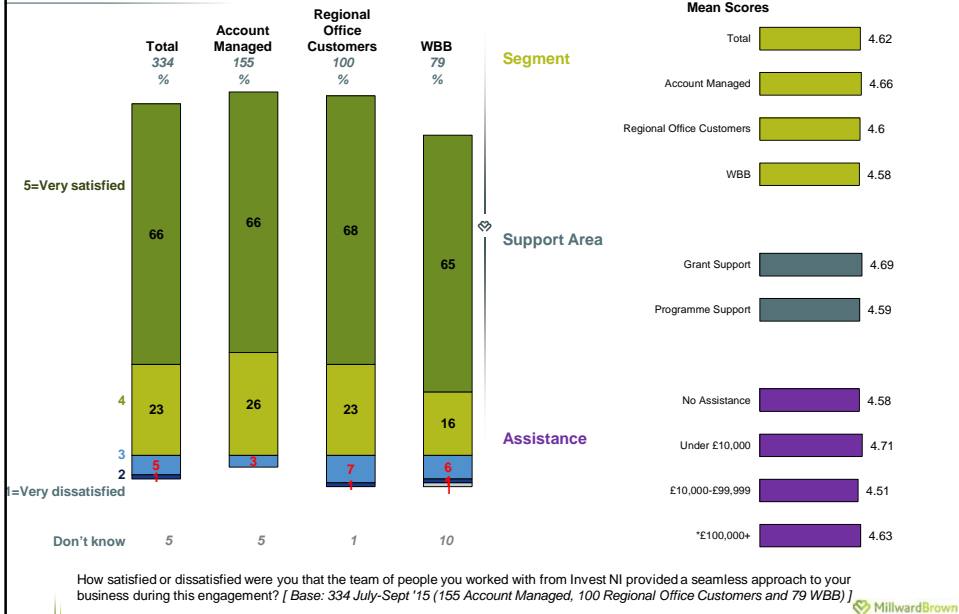
*Small Bases = less than 50

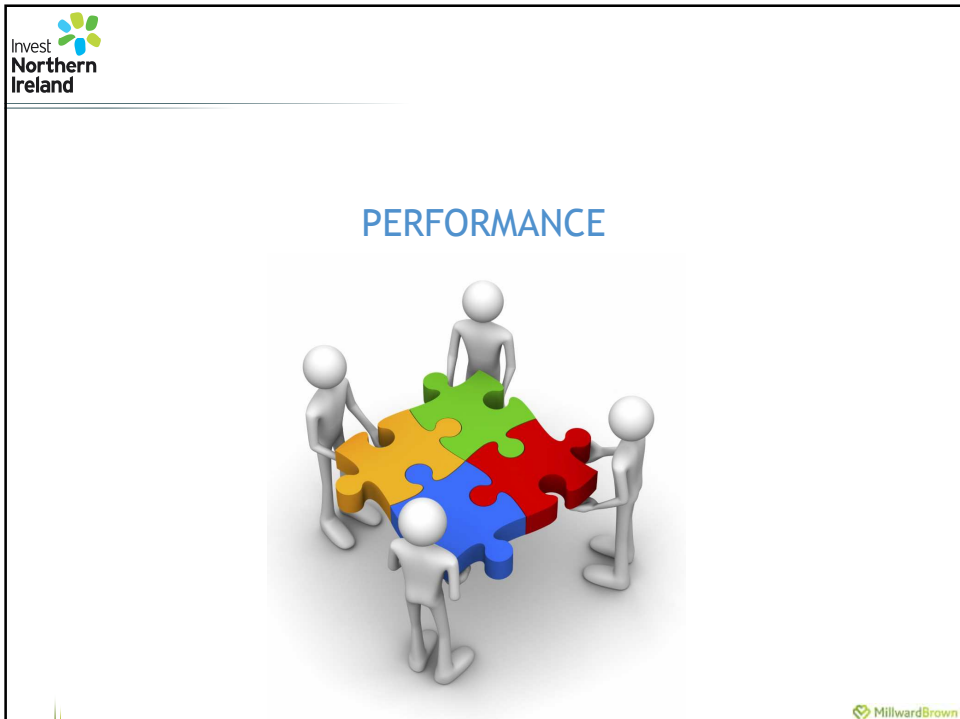
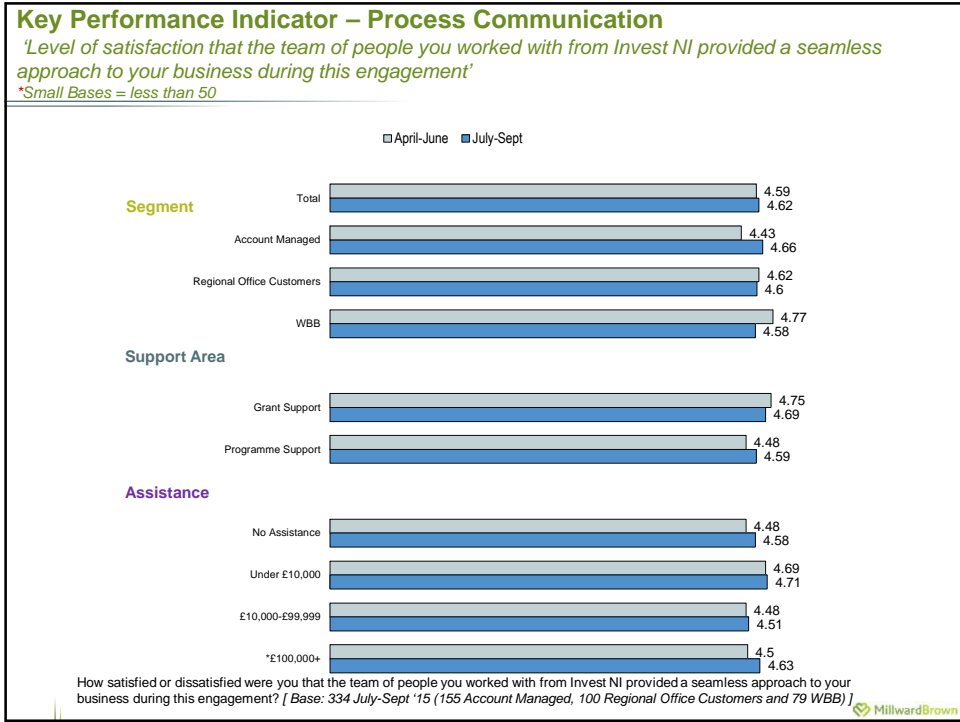


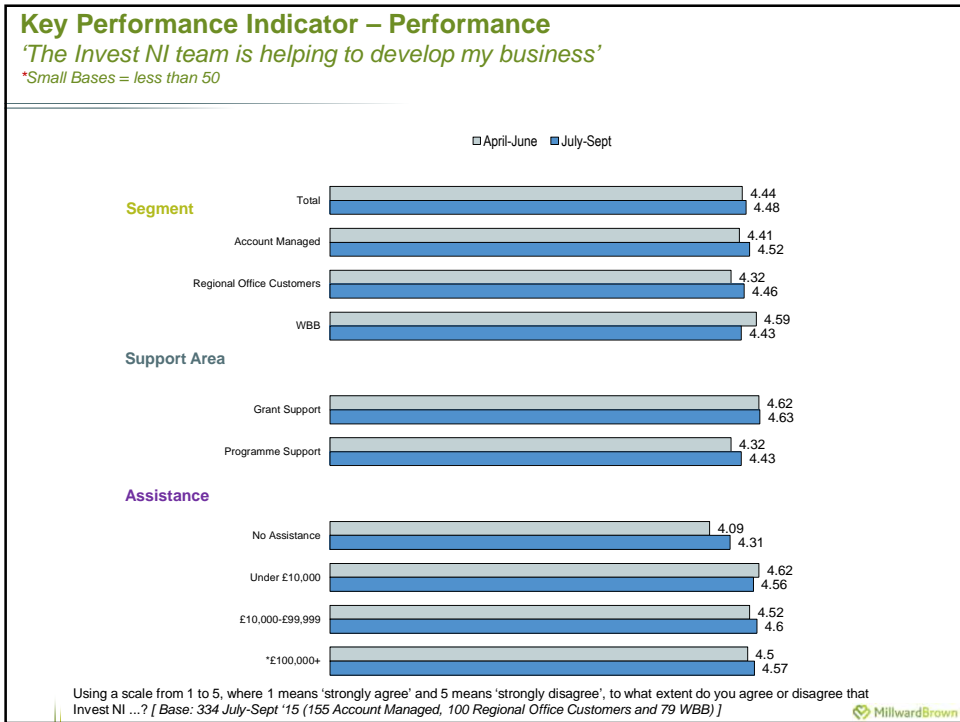
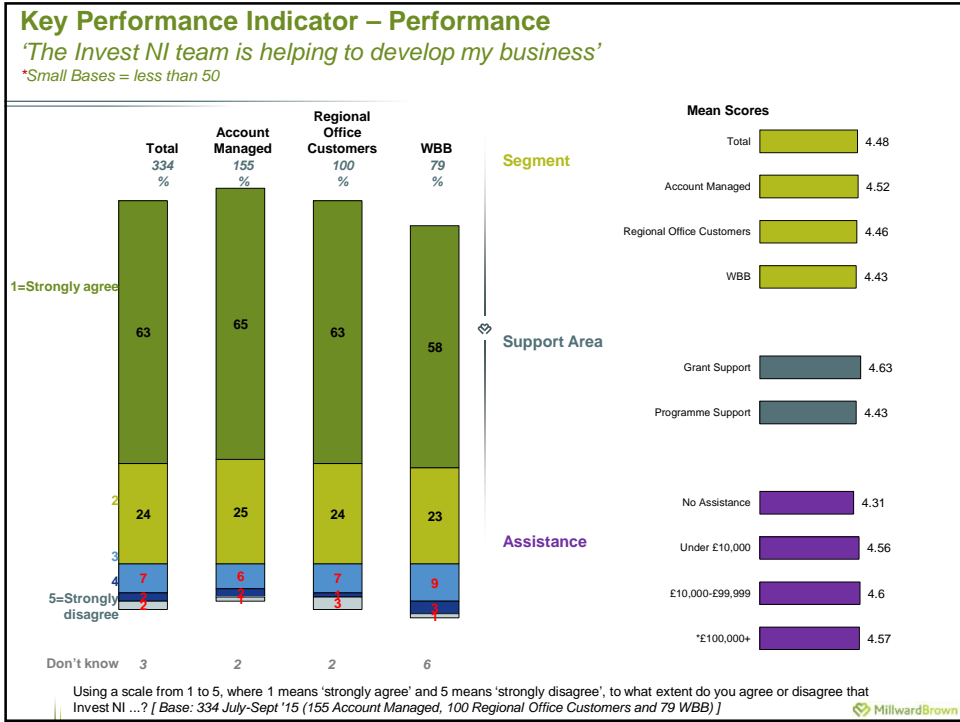
Key Performance Indicator – Process Communication

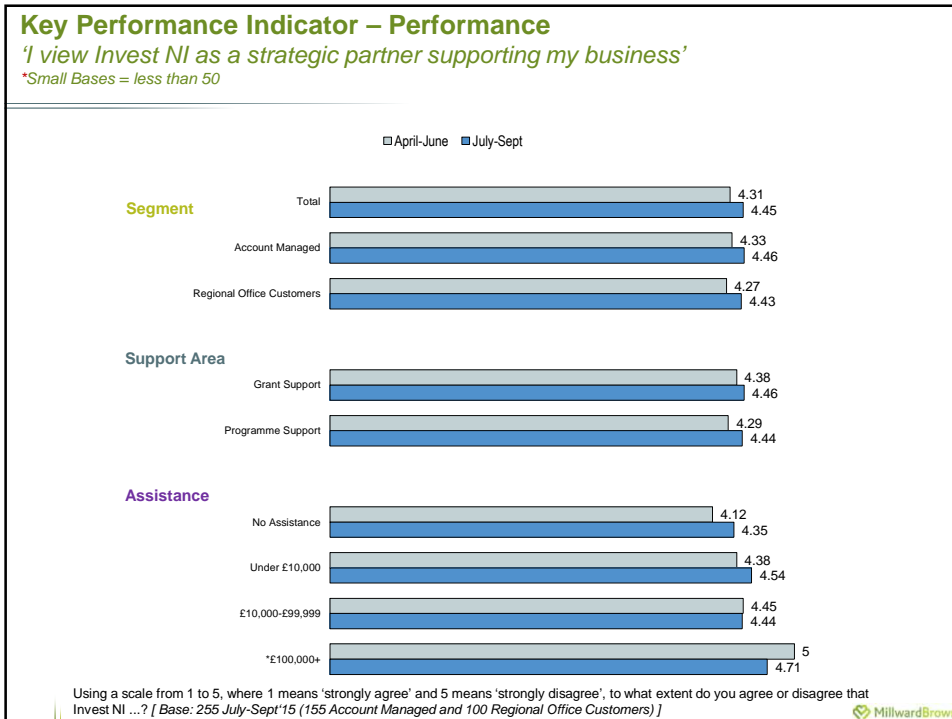
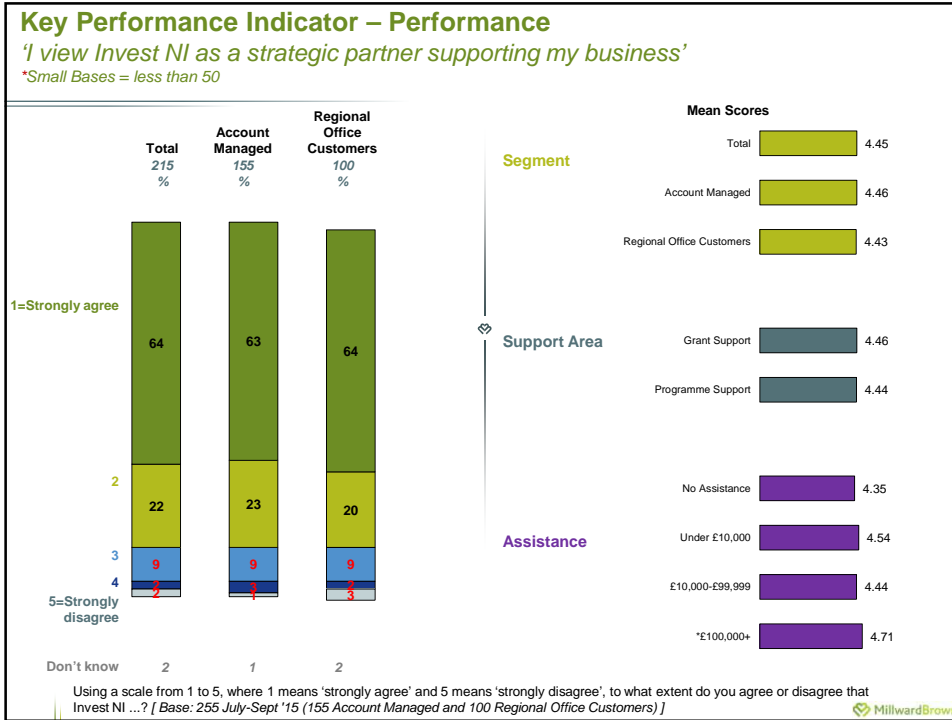
'Level of satisfaction that the team of people you worked with from Invest NI provided a seamless approach to your business during this engagement'

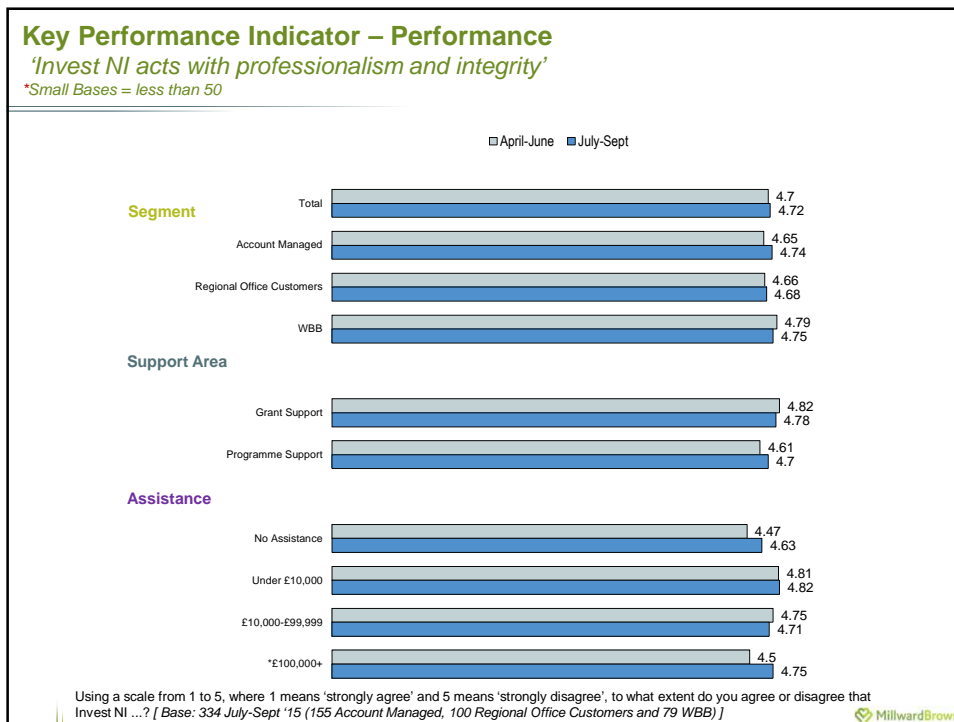
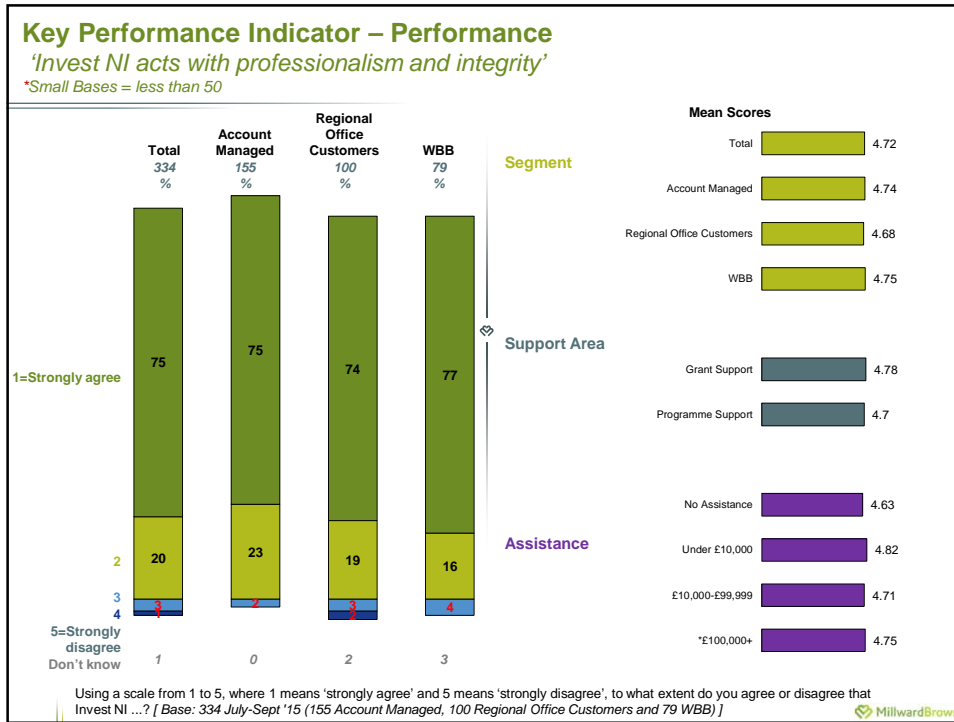
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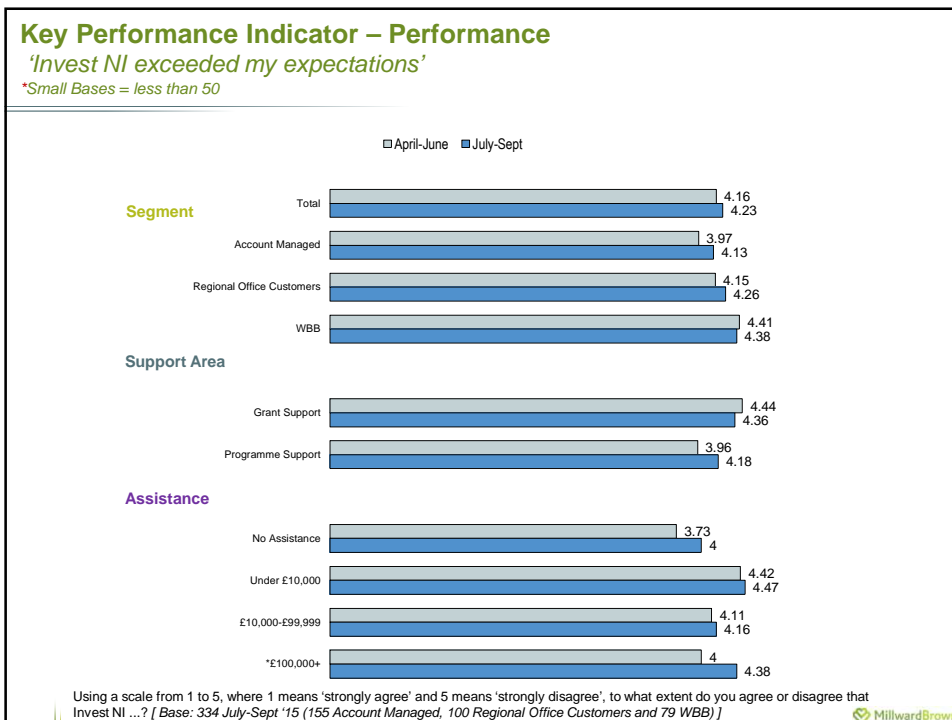
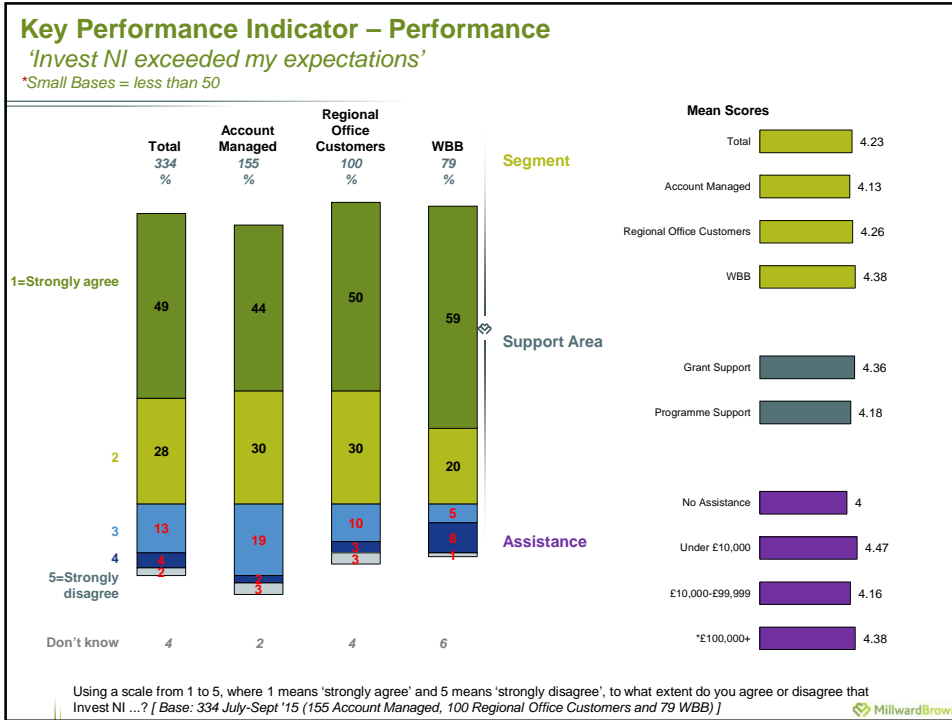


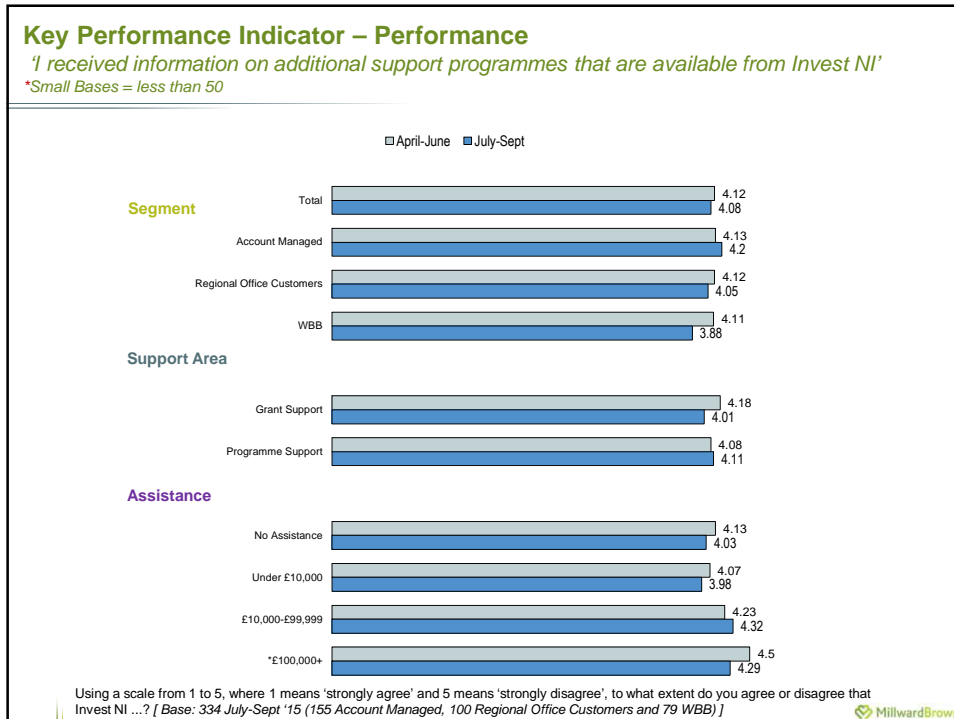
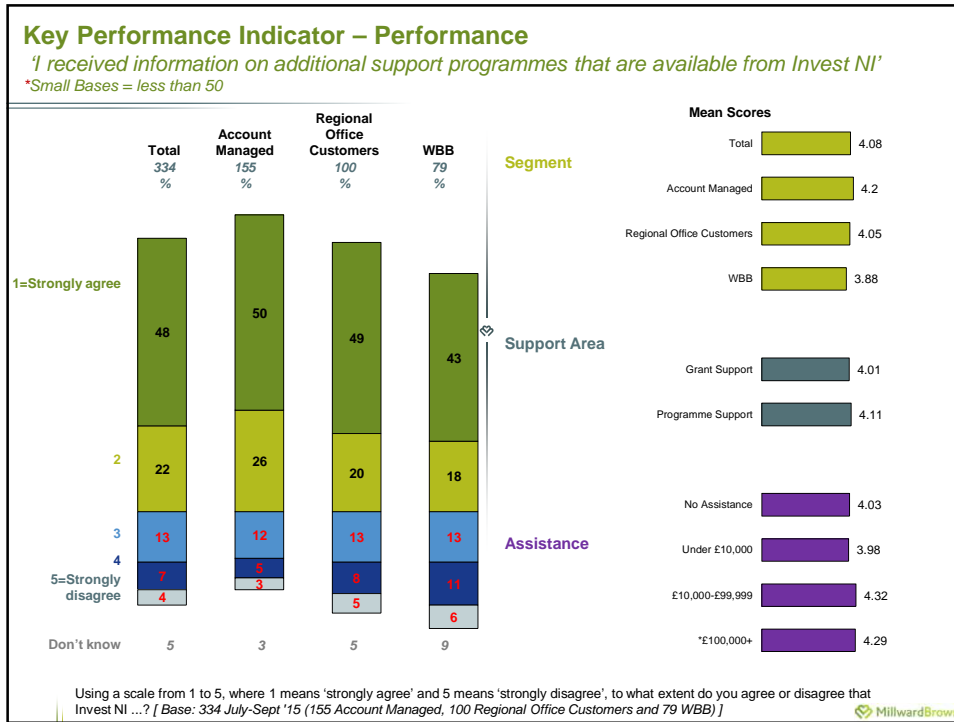


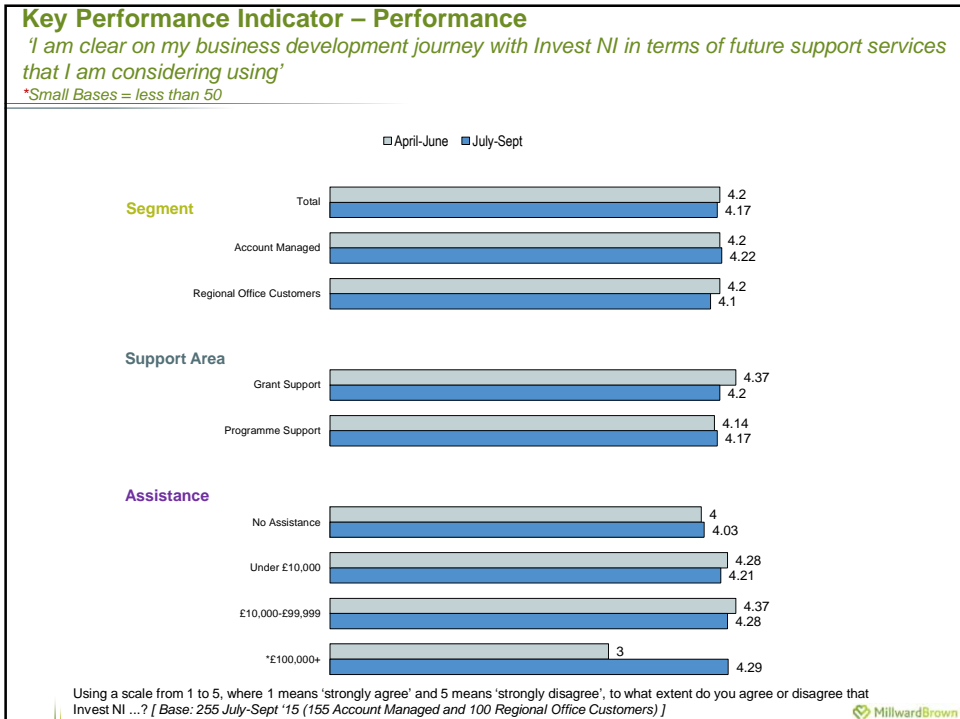
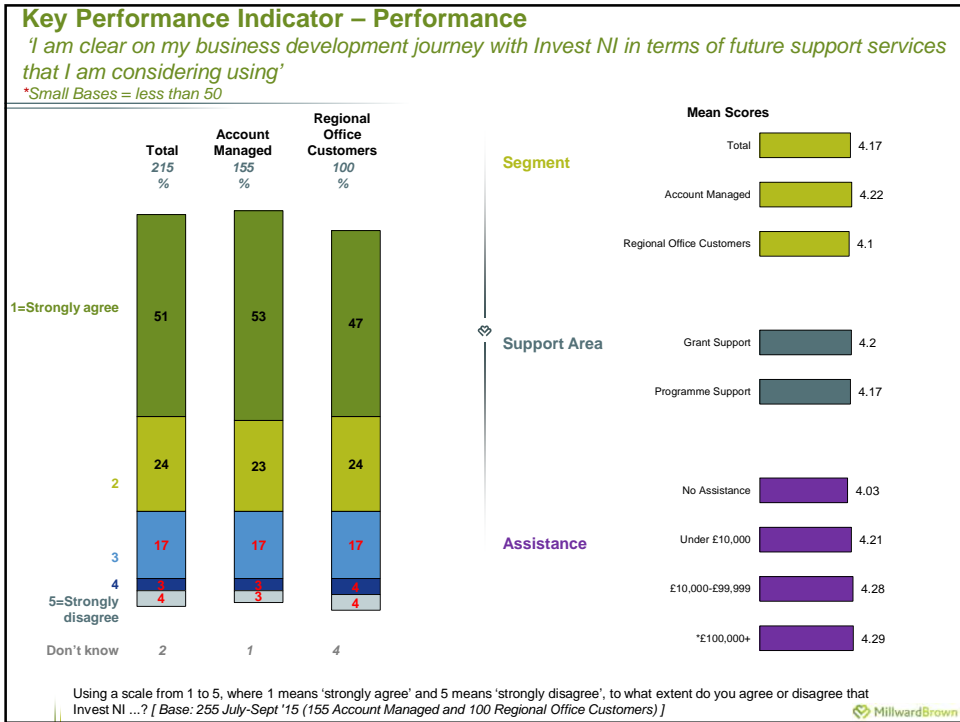


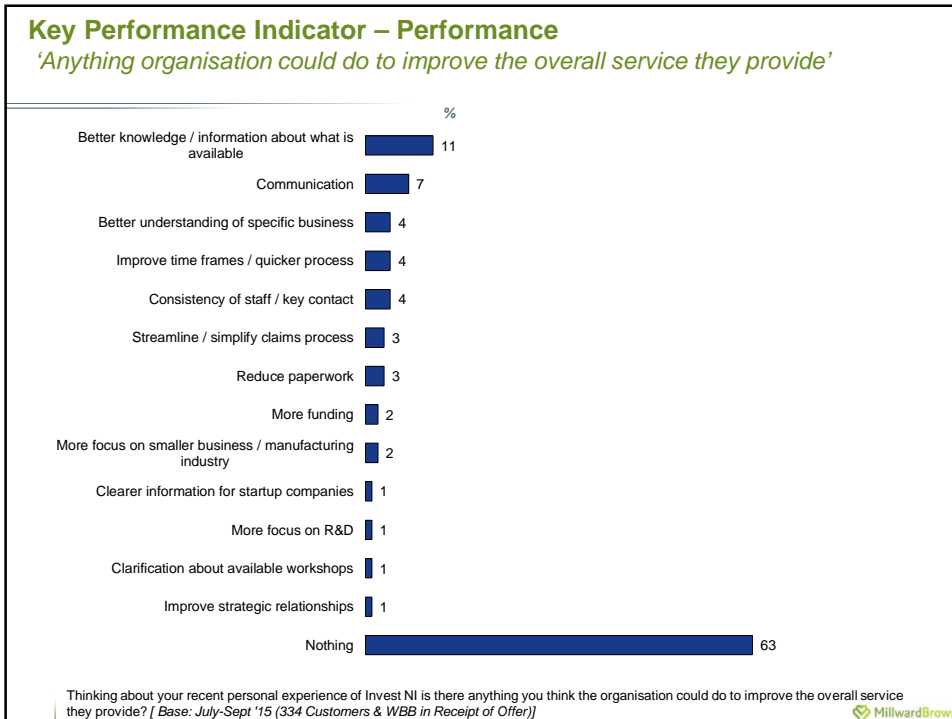
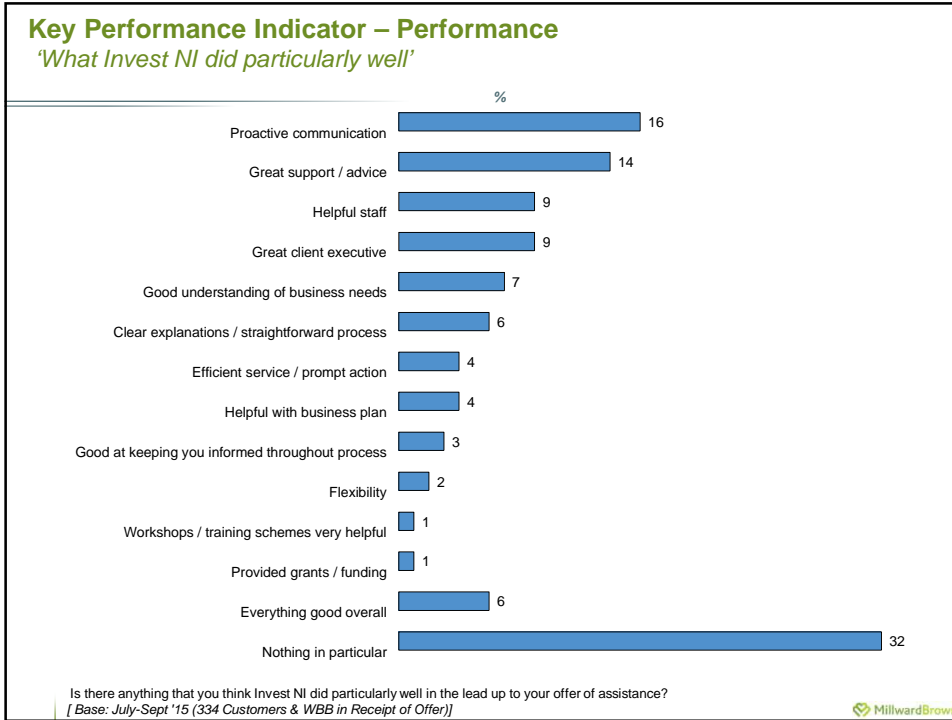


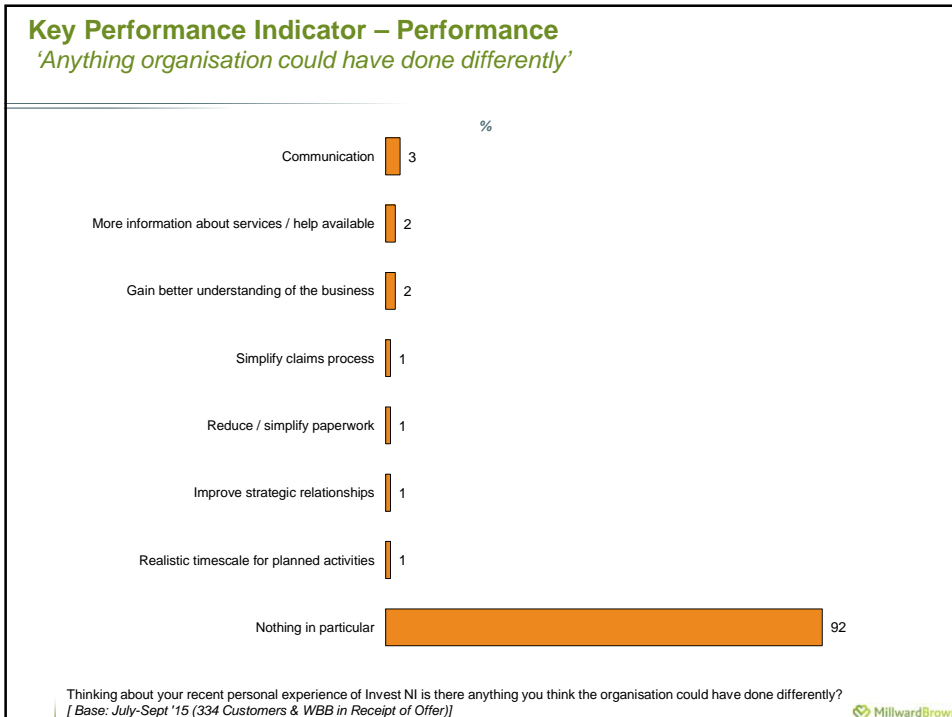
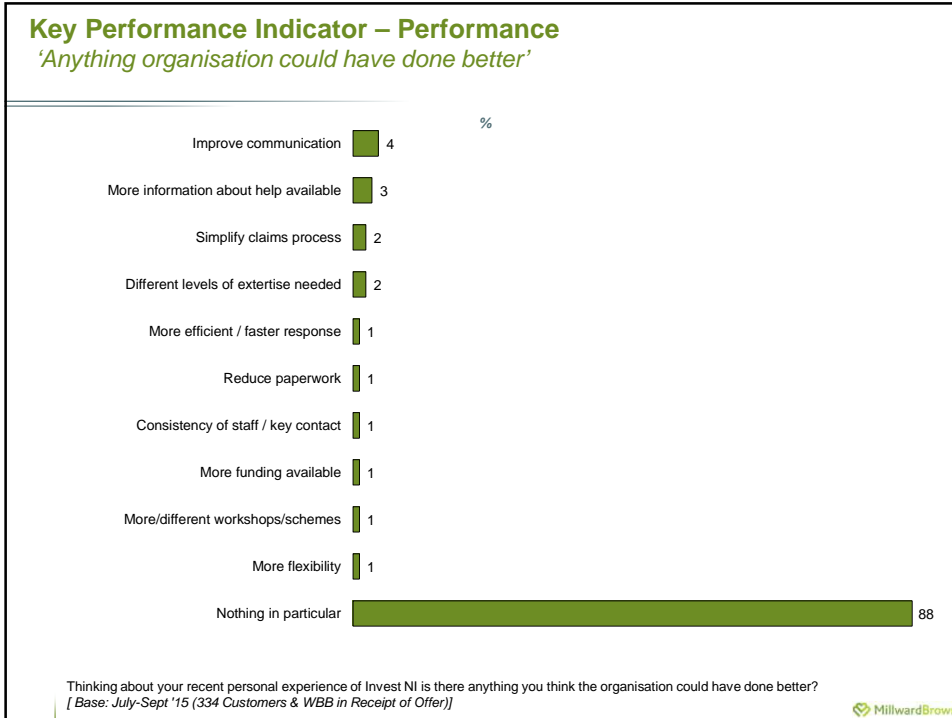




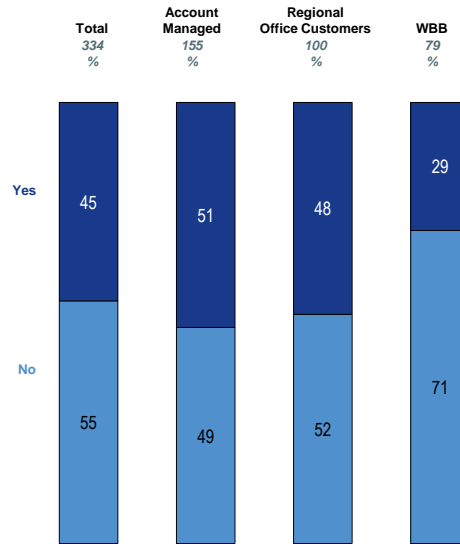








Actively Discussing Application for Additional Support



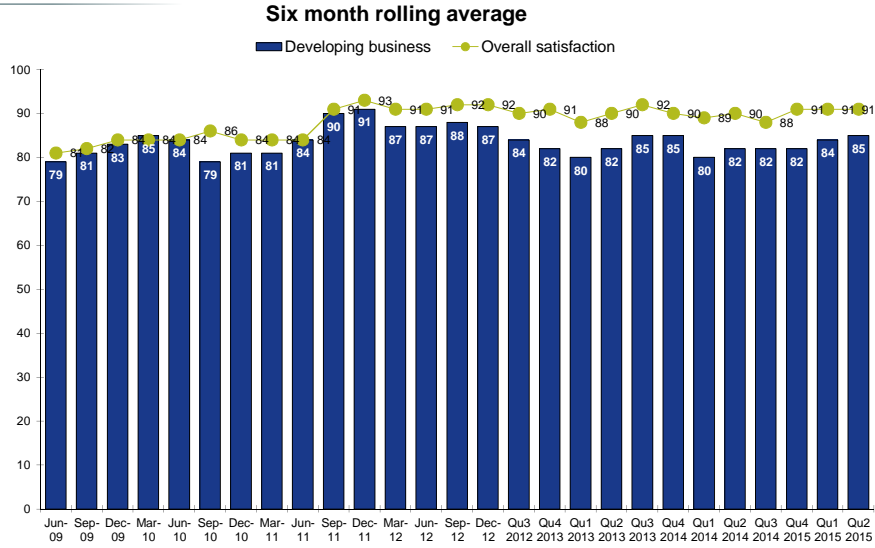
Are you actively discussing an application for additional support services at present?
 [Base: [Base: 334 July-Sept '15 (155 Account Managed, 100 Regional Office Customers and 79 WBB)]



ROLLING AVERAGES

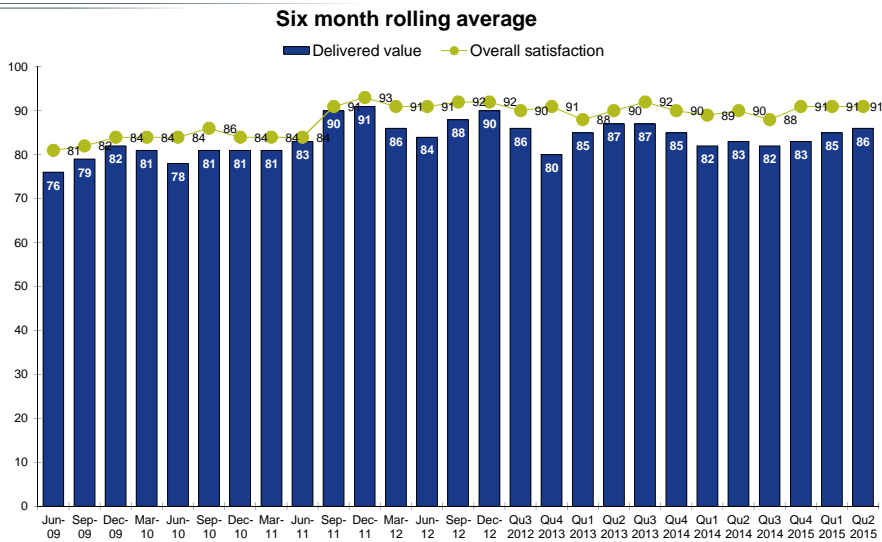


Satisfaction and key driver variables: INI is helping to develop my business



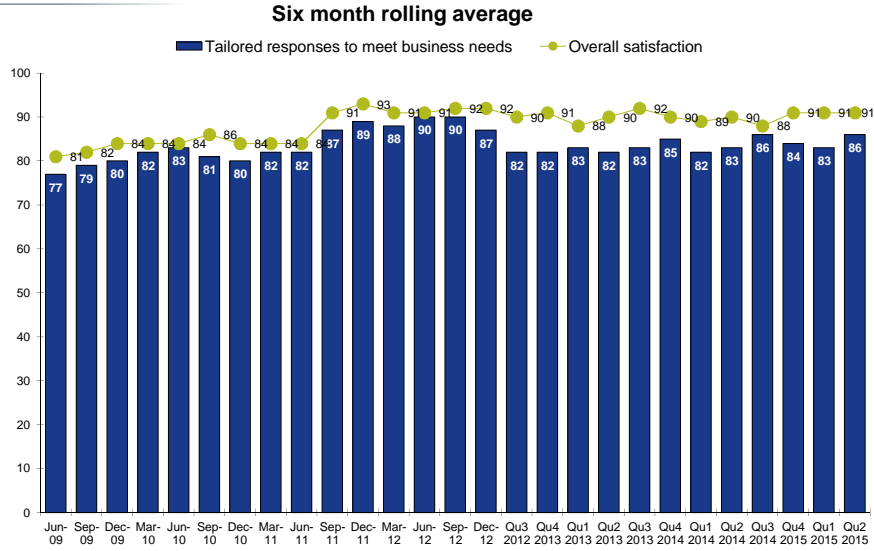
MillwardBrown

Satisfaction and key driver variables: INI delivered value to my business

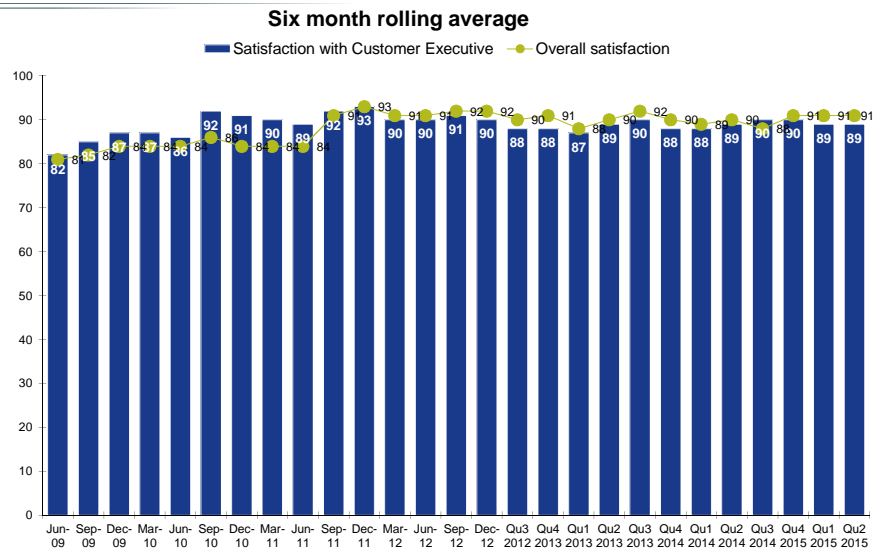


MillwardBrown

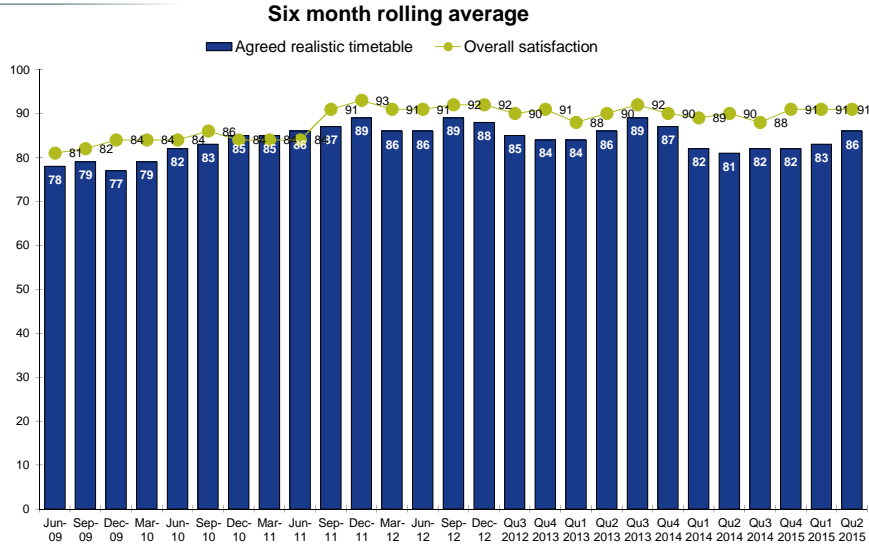
Satisfaction and key driver variables: INI tailored their responses to meet your business needs



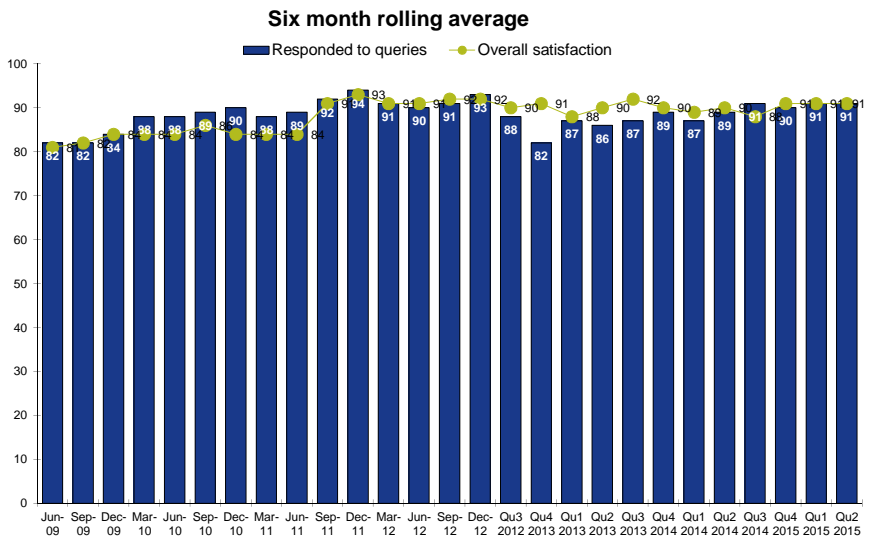
Satisfaction and key driver variables: Satisfaction with Client Executive



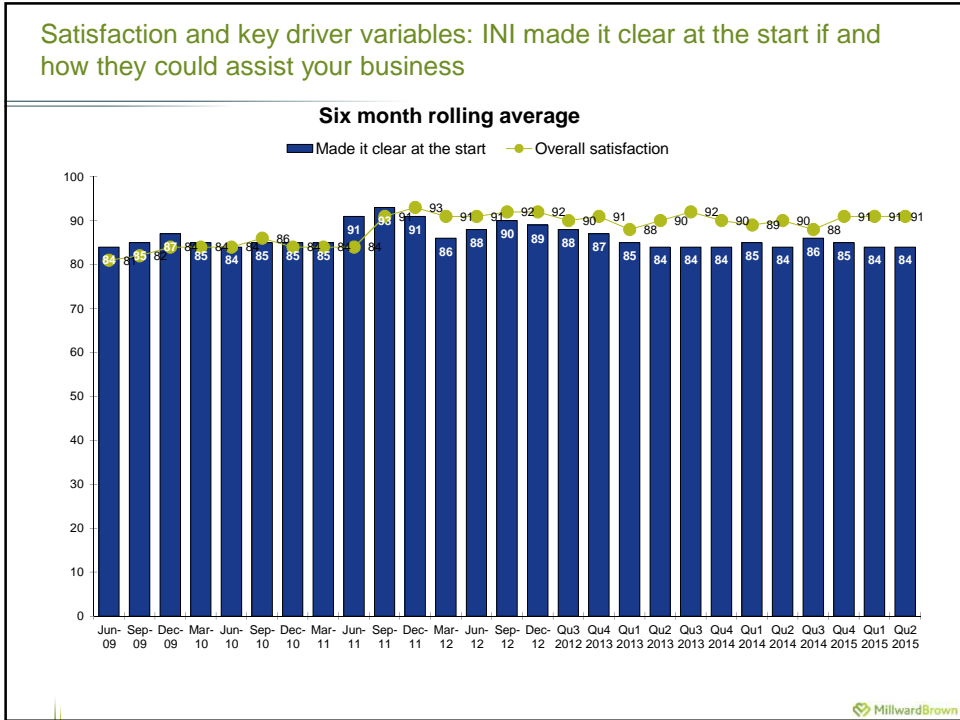
Satisfaction and key driver variables: INI discussed and agreed a realistic timetable for planned activities



Satisfaction and key driver variables: INI responded to your queries within a reasonable timeframe



Satisfaction and key driver variables: INI made it clear at the start if and how they could assist your business



Invest Northern Ireland

DETAILED PERFORMANCE MEASURES

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