



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 accordance with ISO 9001:2008, the international quality standard ISO 20252: 2012 and the Market Research Society ethical Code of Conduct. MRQSA Market Research Quality Standards Authority.**

Sample

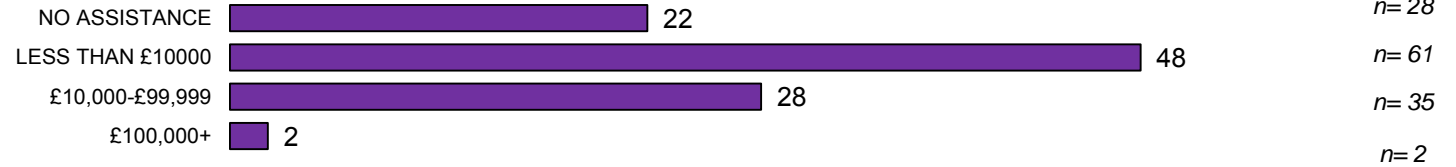
- Some 126 interviews were completed, 41 of these were Account Managed Customers and 61 were Regional Office Customers, all who accepted a letter of offer or support between October 2018 and December 2018. A sample of 24 were the Wider Business Base who had some form of interaction with Invest NI between October 2018 and December 2018. Of the 126 participating customers and WBB, 102 Customers and 24 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.

Analysis of Sample

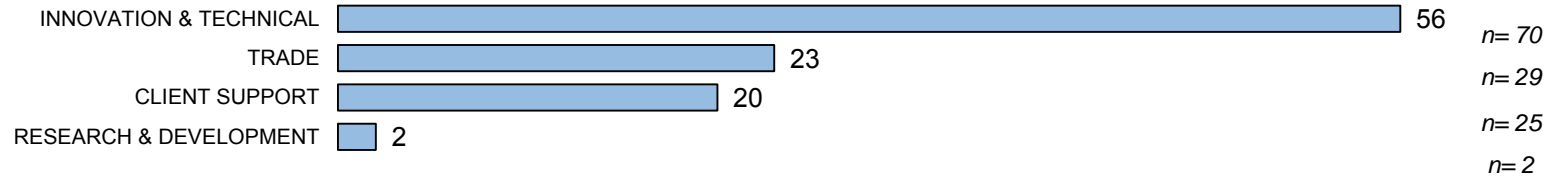
%

Base

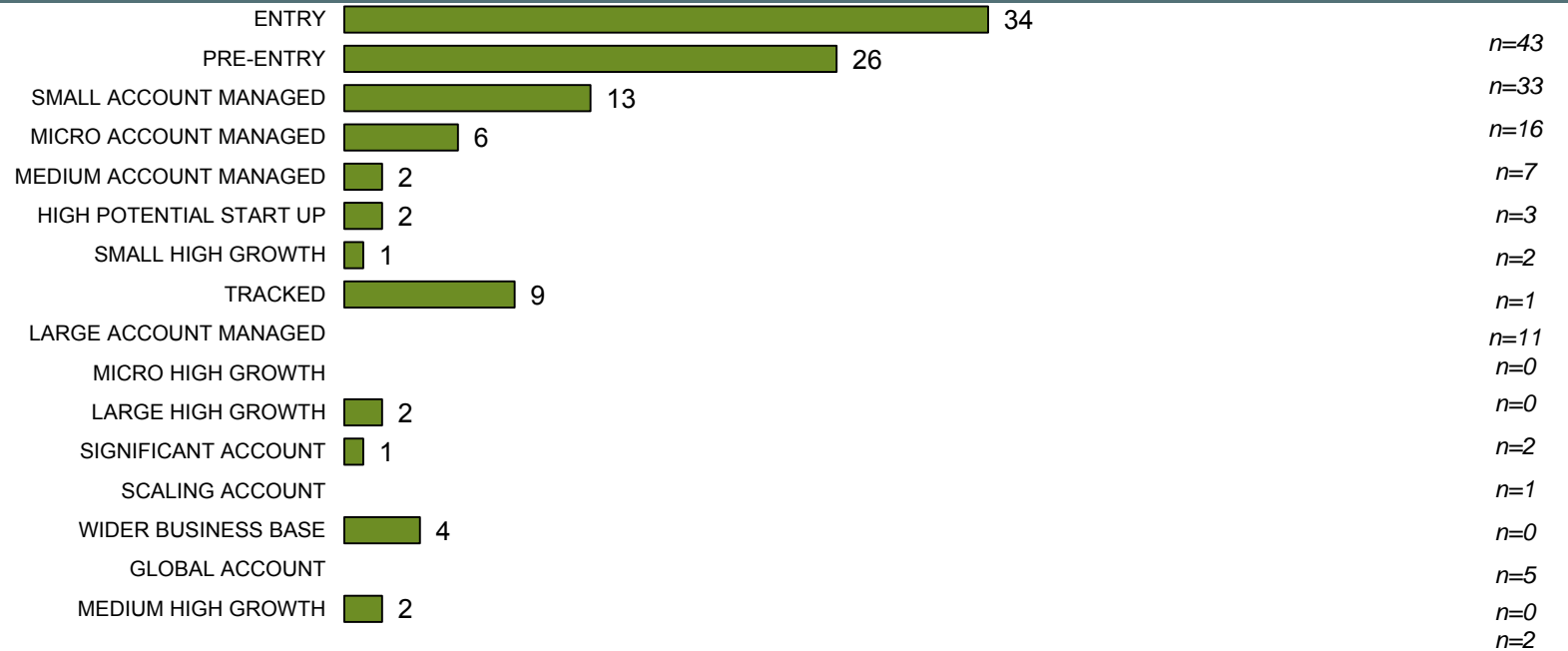
Assistance



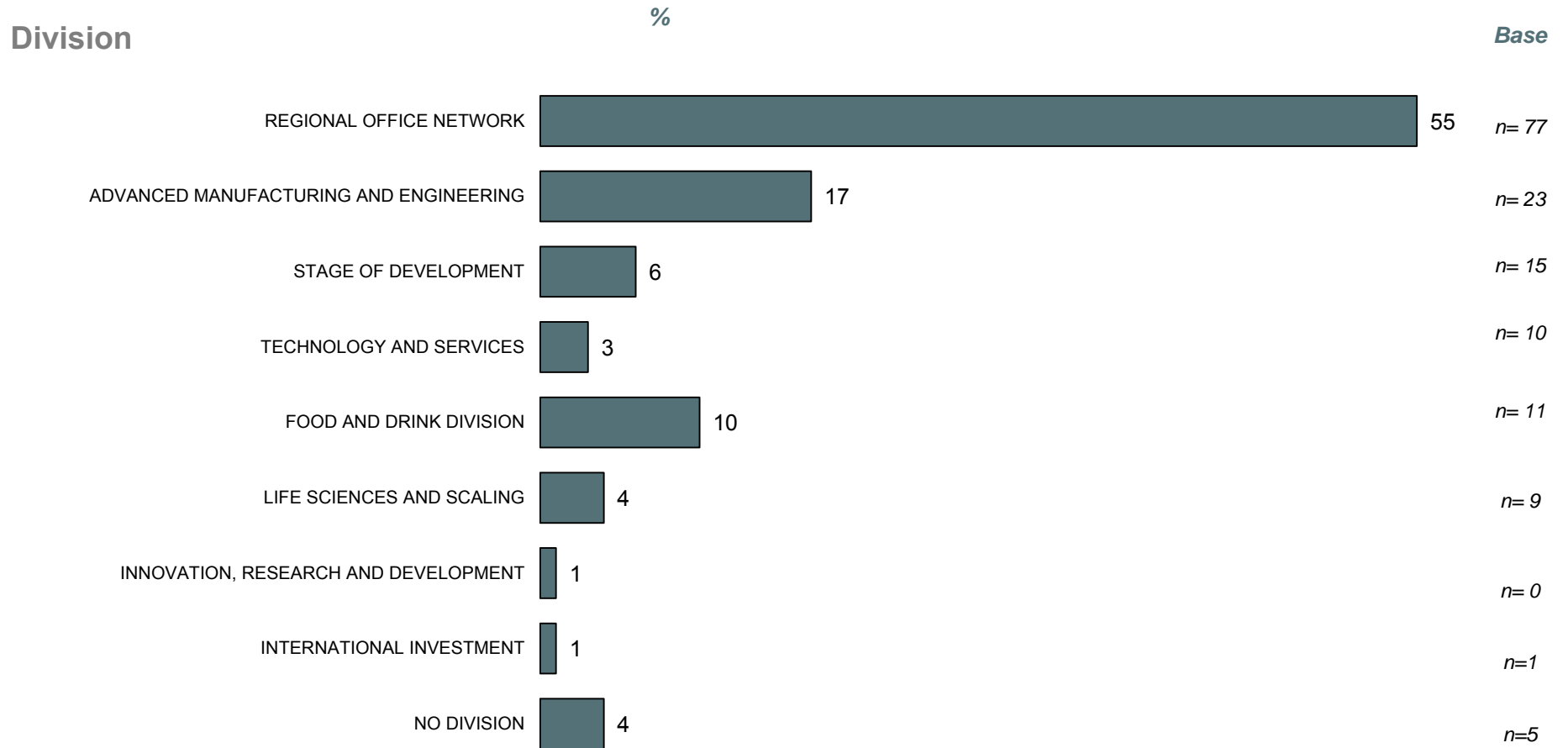
Support Area



Segment



Analysis of Sample cont'd



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 97%. 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 97.2%, which is presented as 97%.*

Executive Summary (1) – Customers

Key Performance Indicators

- In Q3 2018, satisfaction with overall service received remained consistently high across the total sample with over 9 in 10 (96%) claiming to be satisfied. Within this, three quarters (75%) were 'very satisfied' with Invest NI overall. These satisfaction results are fairly consistent with Q2 2018 (94%) findings.
- All of the Account Managed Customers surveyed (100%) stated they were satisfied. Just over three quarters (76%) of Account Managed Customers expressed they were 'very satisfied' (Higher than Q2 2018 - 68%).
- Overall levels of satisfaction among Regional Office Customers (95%) was similar to Q2'18 (96%) results, but there was an increase in those who claimed to be 'very satisfied' (from 66% to 74%) .
- This quarter only 24 wider business base customers were surveyed so the base is too small to draw any conclusions from. While 23 were satisfied, 1 was neutral.
- Levels of satisfaction remained high across both support areas. Grant support received a mean score of 4.92 (up from Q2'18 at 4.62) and Programme support received a mean score of 4.65 (up from 4.59 in Q2'18).

Executive Summary (2) – Customers

Key Performance Indicators

- In Q3 2018, advocacy levels were high with over 9 in 10 (94%) customers stating they would speak highly of Invest NI (similar to Q2'18 at 90%).
- Advocacy levels were highest among Account Managed Customers (95%), consistent with the Q2 level (95%). Advocacy levels were also high among Regional Office customers at 94%, increasing since Q2'18 (85%). Of the 23 WBB customers participating, 22 would speak highly of Invest NI.
- Levels of advocacy were similar for Grant and Programme support, receiving a mean score of 4.76 and 4.35 respectively. These results were higher than Q2'18 for Grant support (4.26) but consistent across Programme support (4.34 Q2'18).
- Invest NI achieved a Net Promoter Score of +55 (Q2'18 +62). The Net Promoter Score among Regional Office Customers (+43) decreased from +62 in Q2'18. The Net Promoter Score amongst Account Managed Customers was +69 and +59 across the WBB.

Executive Summary (3) – Customers

- Just over 9 in 10 (91%) customers agreed that Invest NI was helping to develop their business, levels higher than Q2'18 (81%). Agreement was similar amongst Account Managed Customers (95%) and Regional Office Customers (91%). Agreement was lower among the WBB (84%).
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was achieved among those receiving grant support (4.72) compared to programme support (4.47). Figures for grant and programme support had had increased from Q2'18 (4.53 and 4.35 respectively).
- There was almost universal agreement amongst customers (96%) that Invest NI acts with professionalism and integrity, with almost 7 in 10 (67%) customers strongly agreeing with this sentiment, consistent with Q2'18 (66%). Agreement levels were high among Regional Office Customers (98%) and Account Managed Customers (98%). Positive levels were also recorded amongst the WBB (92%).
- Levels of agreement were high across the support areas, with Grant support receiving a mean score of 4.8, higher than Q2'18 (4.5), and Programme support receiving a mean score of 4.6, consistent with the previous quarter (4.61).
- Levels of agreement that Invest NI exceeded expectations had reminded consistent with Q2'18 (83% in Q3 compared to 72% in Q2). Agreement levels were consistent among Account Managed (85%) than Regional Office Customers (87%).

Executive Summary (4) – Customers

- In Q3'18, almost 9 in 10 (88%) customers agreed that Invest NI delivered value to their business (consistent with Q2'18 at 88%). Agreement levels remained consistent among the Account Managed (90%) and Regional Office customers (89%).
- Just over three quarters of customers (78%) agreed that they received information on additional support programmes that are available from Invest NI. These levels of agreement were again similar to Q2'18 (79%). Overall agreement among Regional Office customers was 86%. Account Managed customers had similar levels of agreement (80%).
- Almost 9 in 10 customers (85%) were in agreement that a realistic timescale was discussed and agreed for planned activities. A finding that was down on the previous quarter (94% in Q2'18).
- Agreement levels among Account Managed customers (88%) had declined since Q2'18 (96%). Agreement levels among Regional Office customers (88%) had also declined since Q2'18 (93%).
- The vast majority (99%) were in agreement that Invest NI treated them fairly, similar to Q2'18 (96%). Across customer segments, agreement was marginally higher among Account Managed customers (100%) than Regional Office customers (98%).

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 Q3 2018, all key drivers of satisfaction achieved a mean score of no less than 4.31 out of a possible 5. The top four rated drivers for Q3 were clarity of communication (4.56), explained and agreed requirements (4.51), clarified if and how they could assist (4.49) and responded to queries (4.48).

Executive Summary (6) – Customers

Detailed Performance Measures

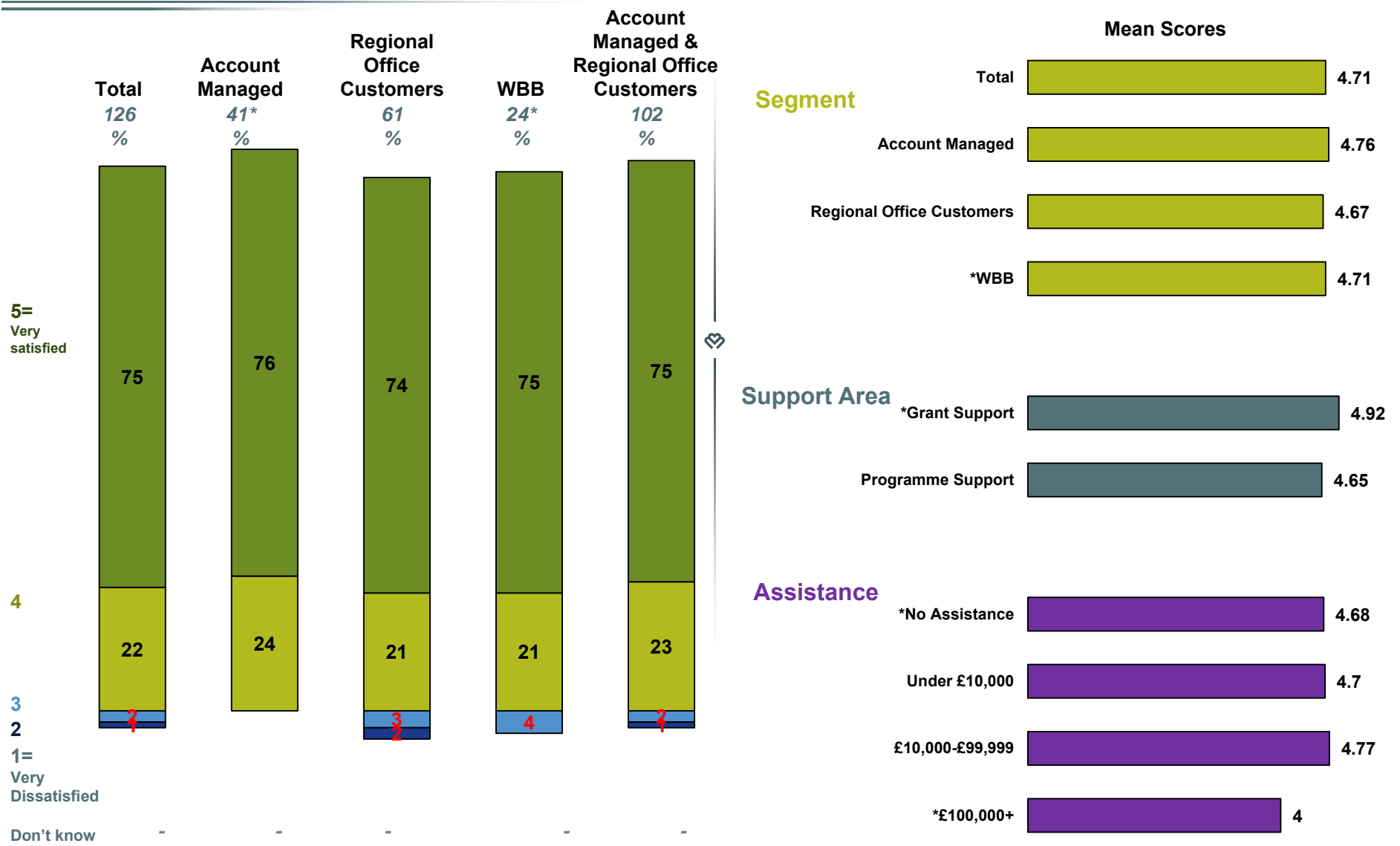
- In Q3 2018, the average mean score for overall performance was 4.44 out of a possible 5. The mean score was fairly consistent with Q2'18 (4.45).
- All performance areas achieved a mean score of no less than 4.31 out of a possible 5, slightly higher than Q2'18 (4.29).
- The strongest performing areas were clarity of communication (4.56), explained and agreed requirements (4.51), clarified if and how they could assist (4.49) and responded to queries (4.48).
- The weaker aspects of the engagement included proactivity in support and advice (4.31).
- The mean score for the overall performance by segment were as follows:
 - Account Managed customers = 4.49
 - Regional Office customers = 4.45
 - Wider Business base = 4.29

SATISFACTION



Key Performance Indicator – Satisfaction

**Small Bases = less than 50*



How satisfied or dissatisfied are you with Invest NI overall in relation to this project?

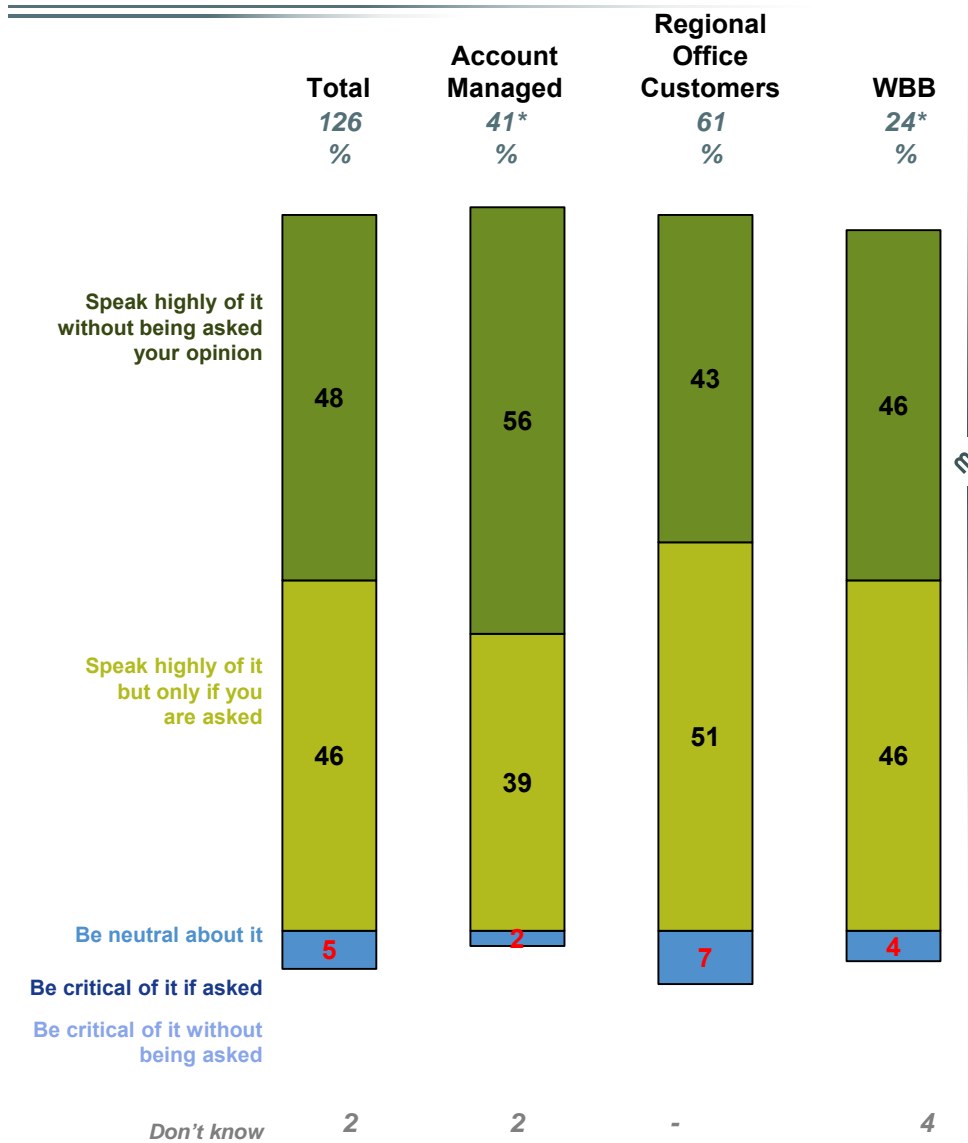
[Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

ADVOCACY



Key Performance Indicator – Advocacy

**Small Bases = less than 50*



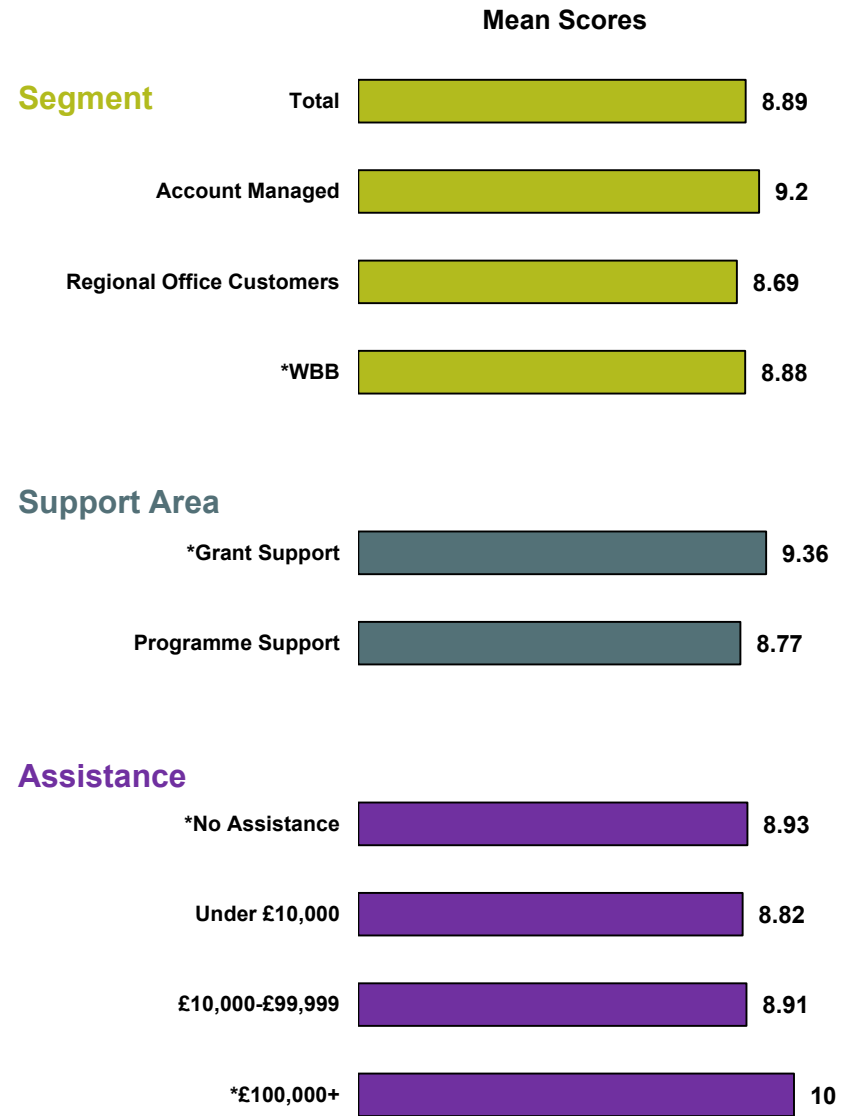
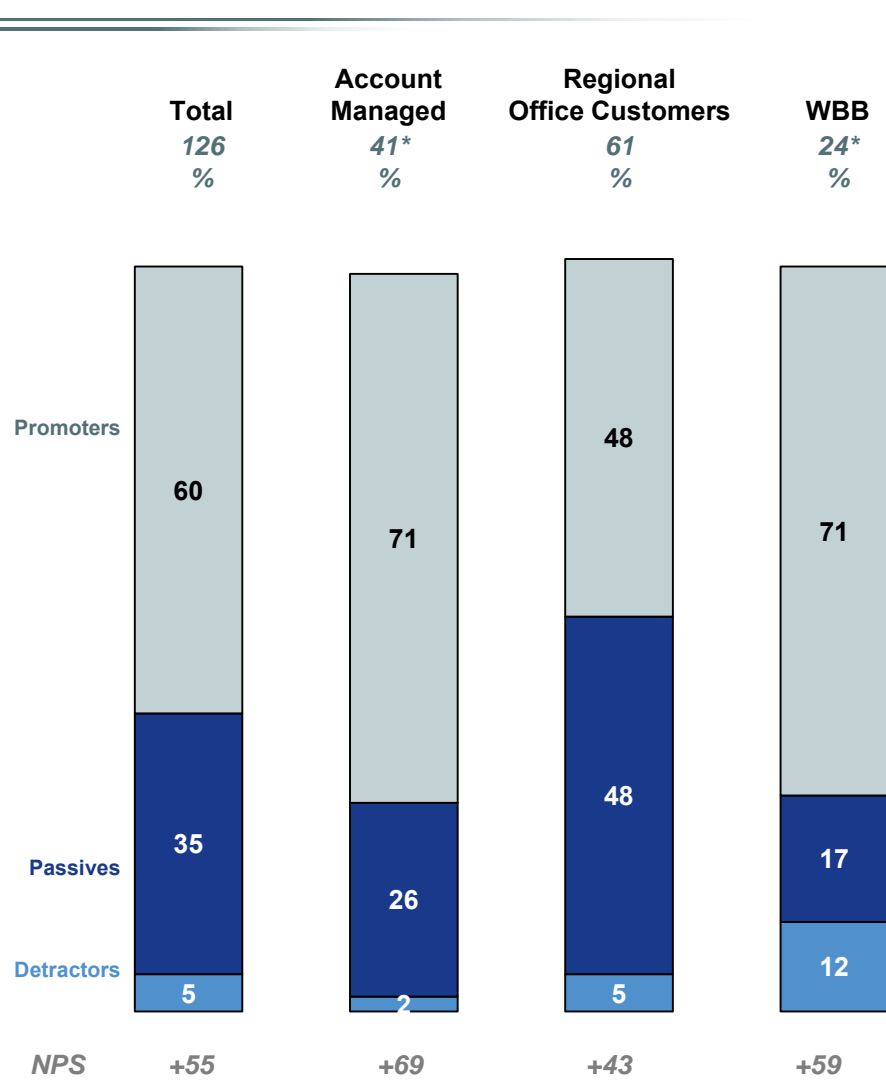
How highly would you speak about Invest NI?

[Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* 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: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

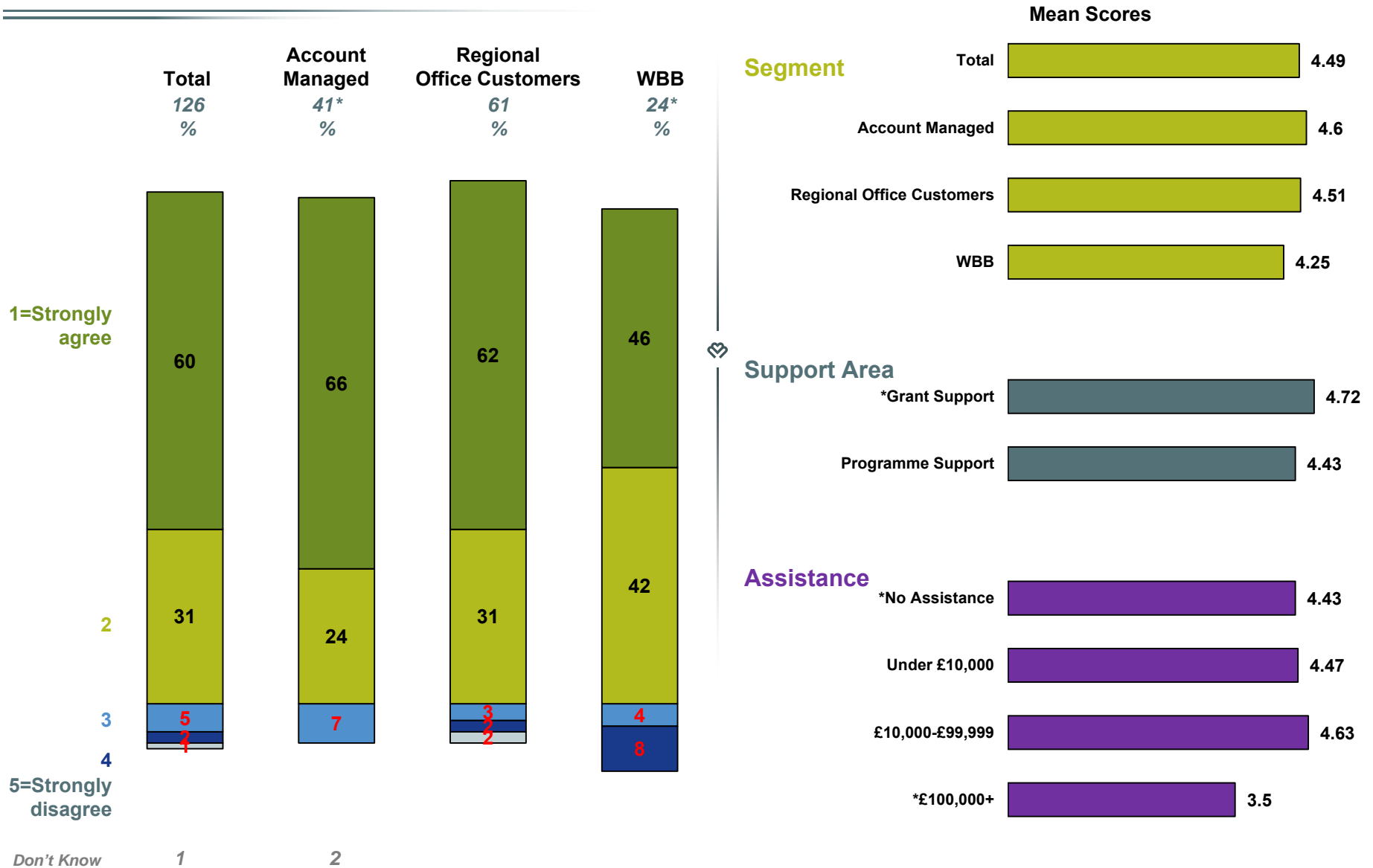
CLIENT FOCUSED



Key Performance Indicator – Client Focused

‘Made it clear at the start if and how it could assist your business’

**Small Bases = less than 50*

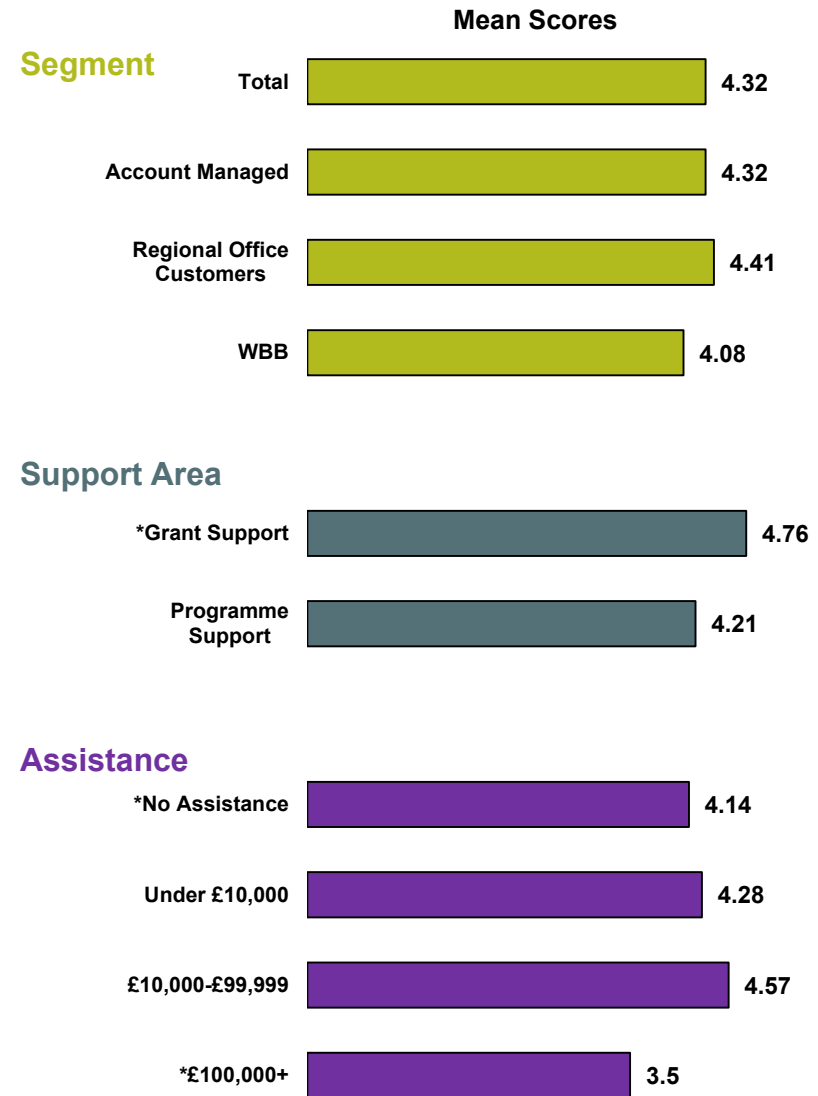
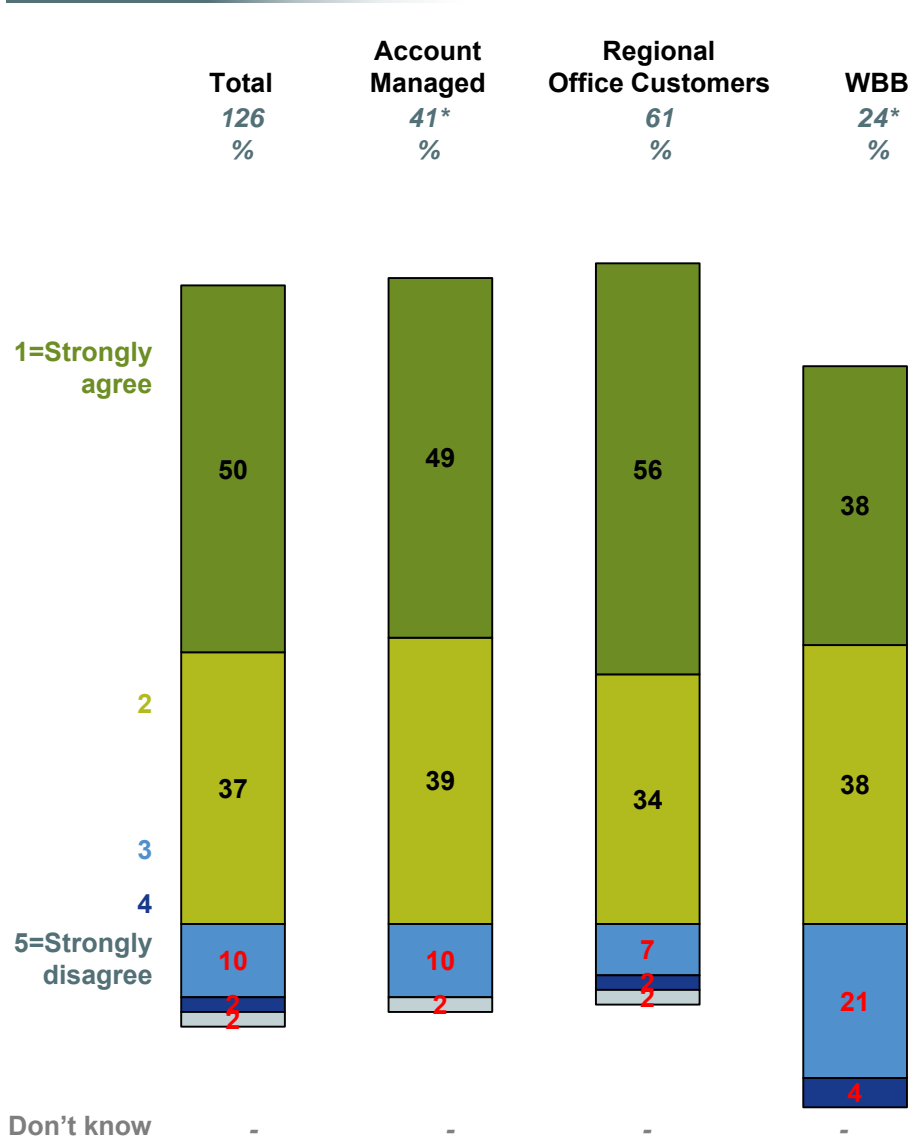


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Client Focused

‘Had sufficient understanding of your business needs’

**Small Bases = less than 50*

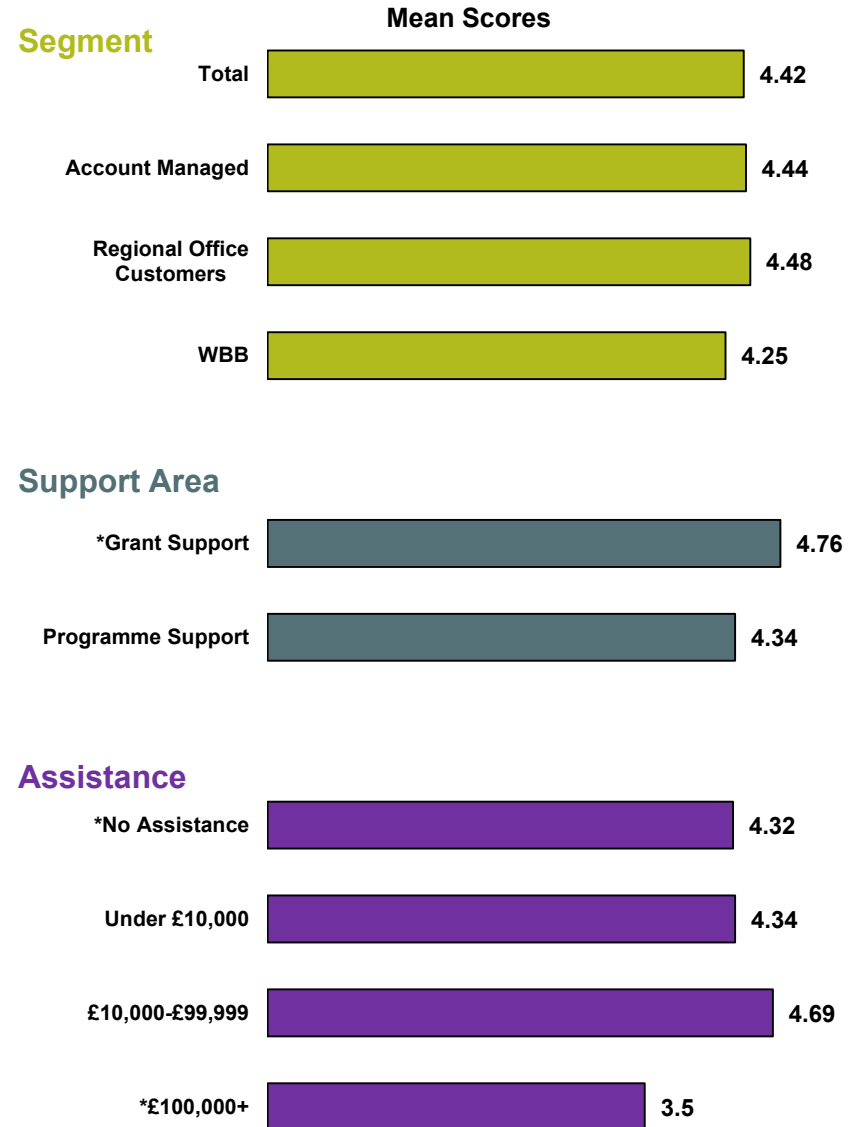
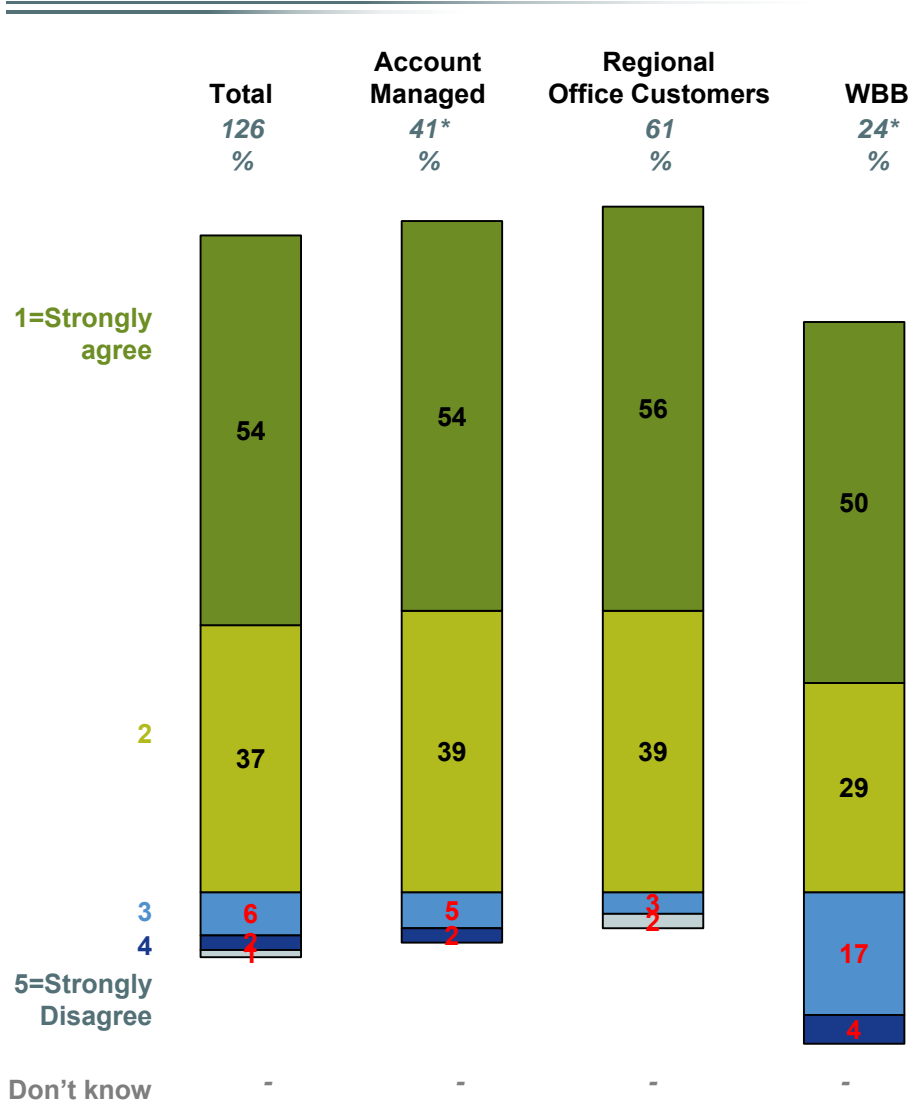


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Client Focused

‘Tailored its response to meet your business needs’

**Small Bases = less than 50*

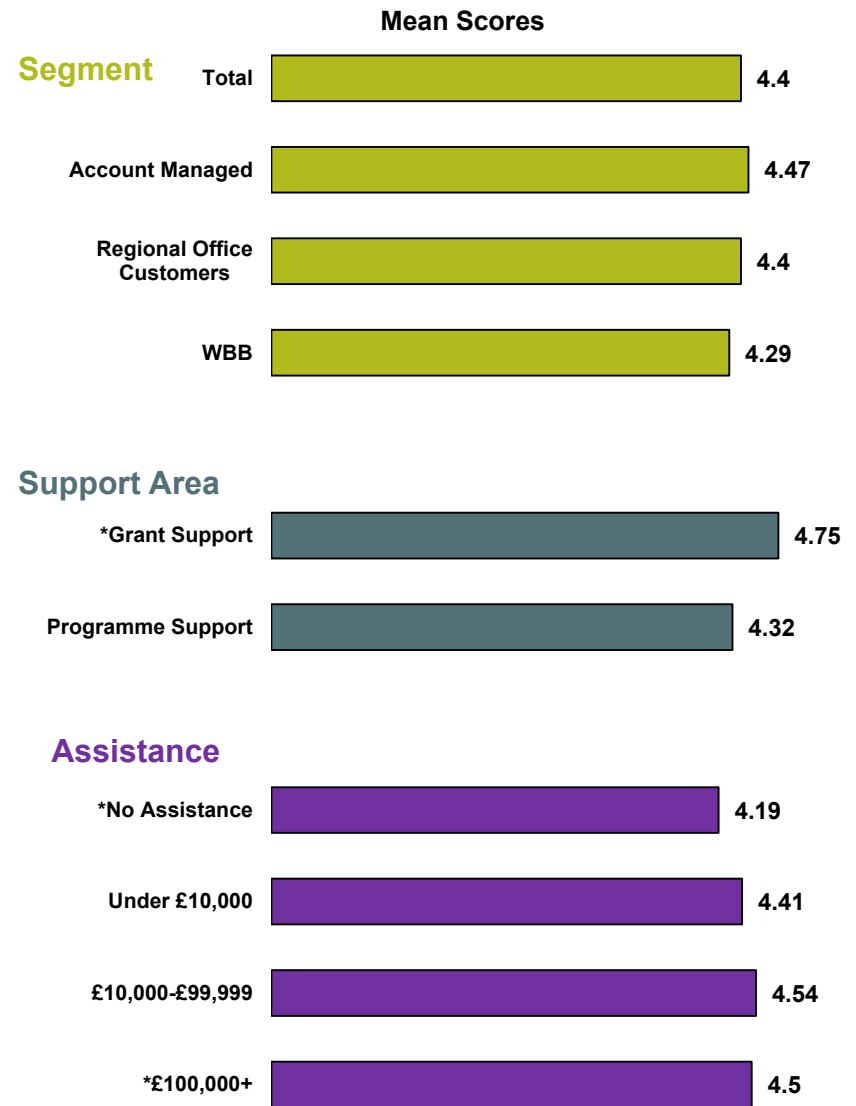
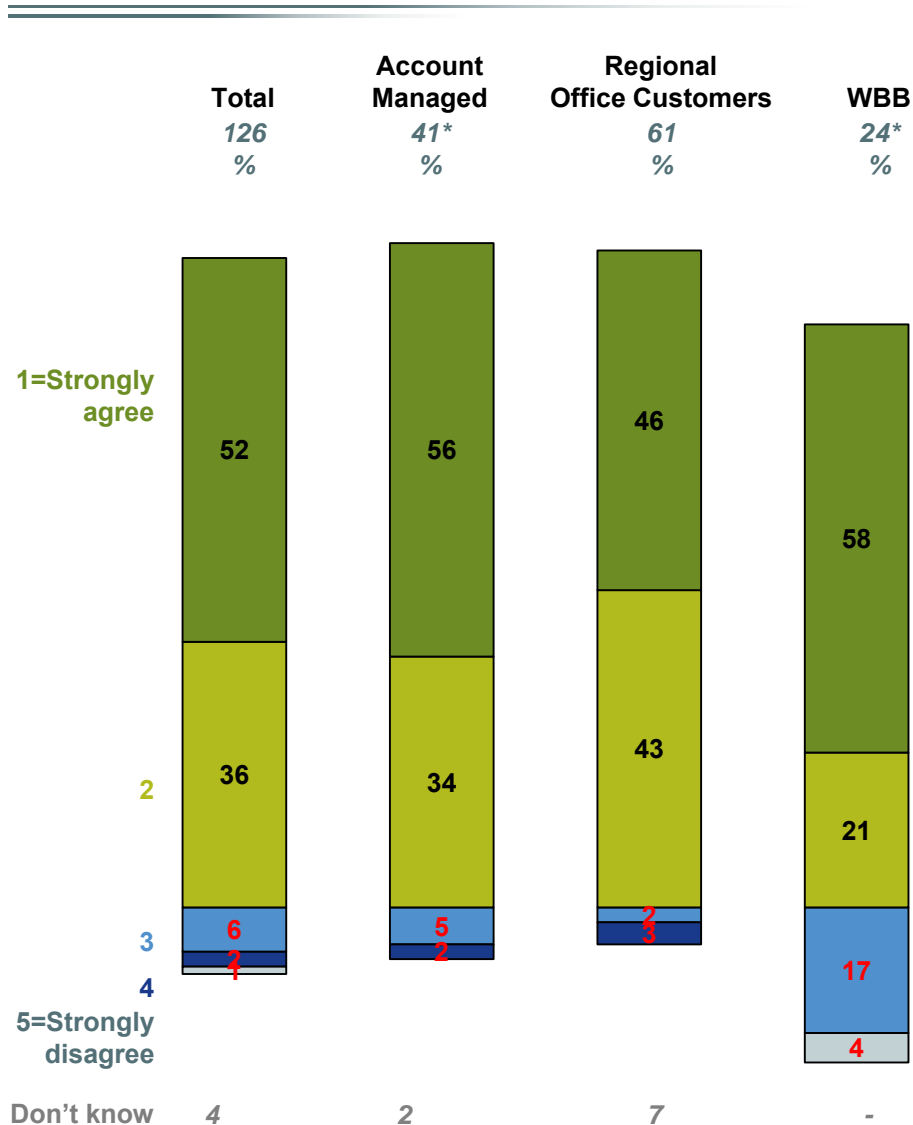


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Client Focused

‘Delivered value to your business’

**Small Bases = less than 50*

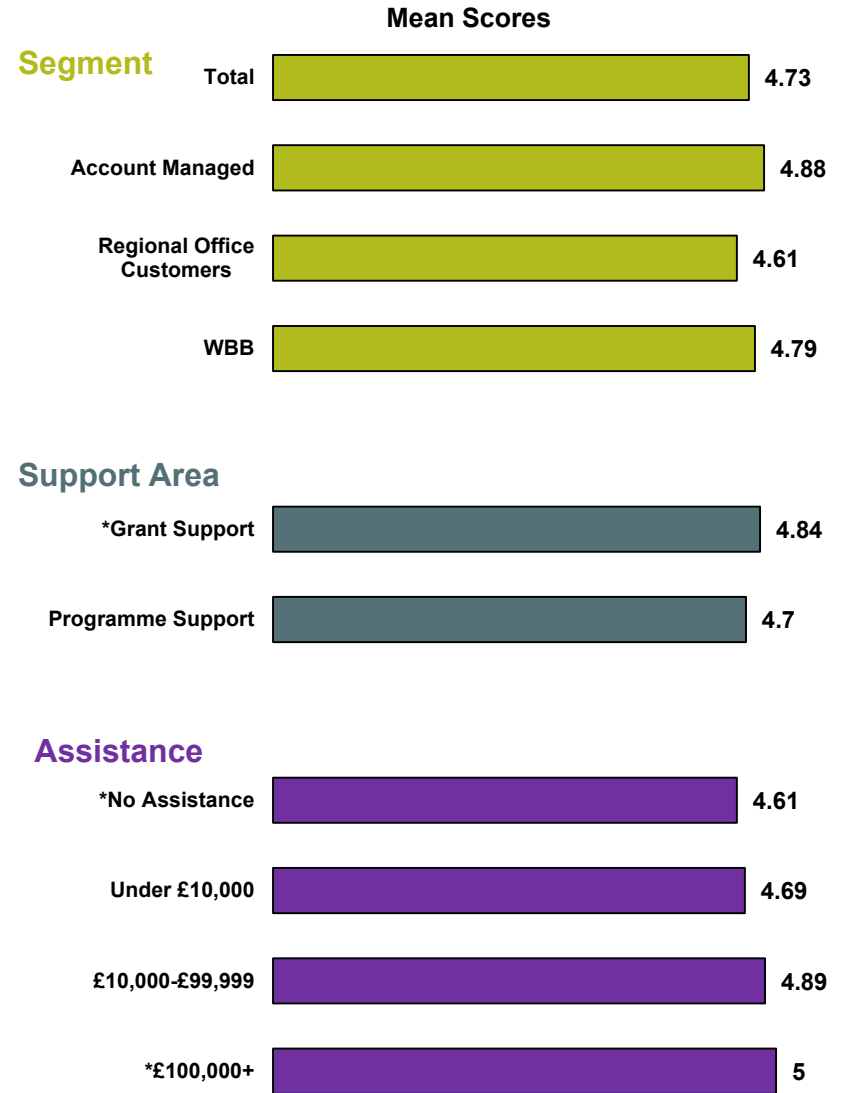
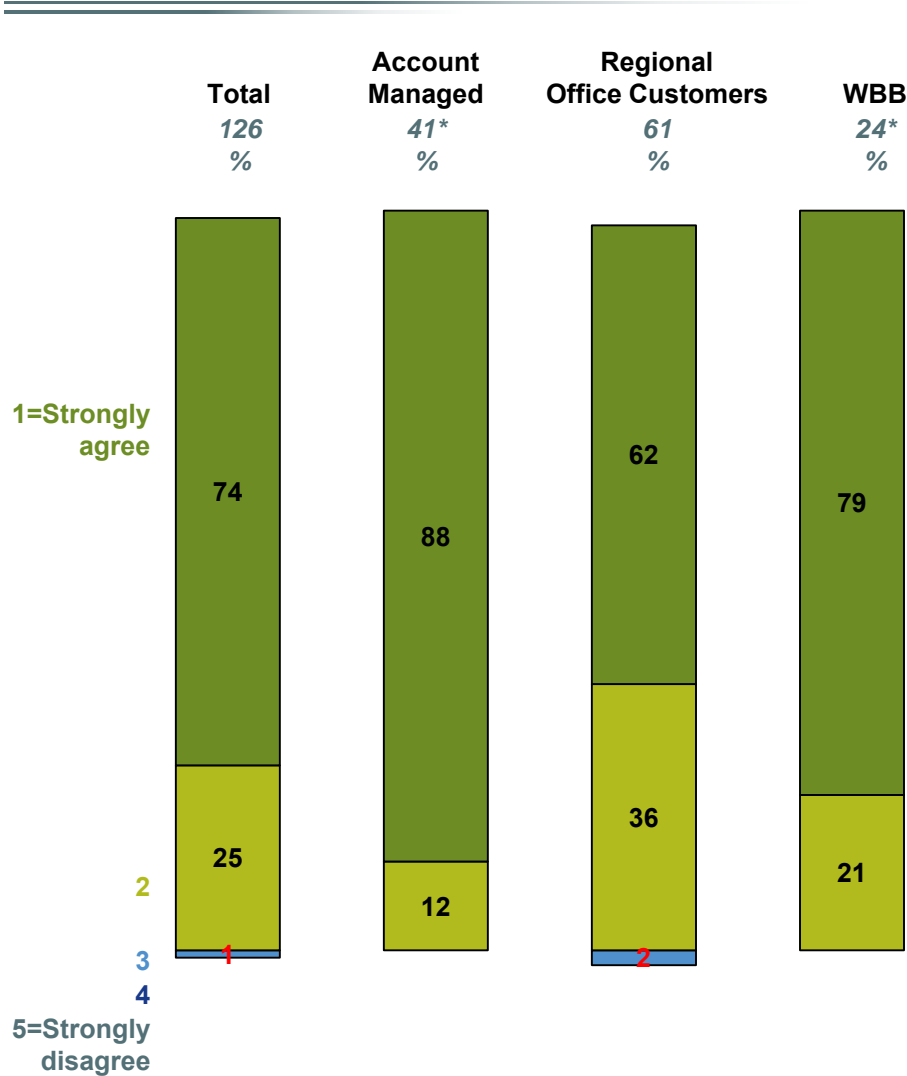


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Client Focused

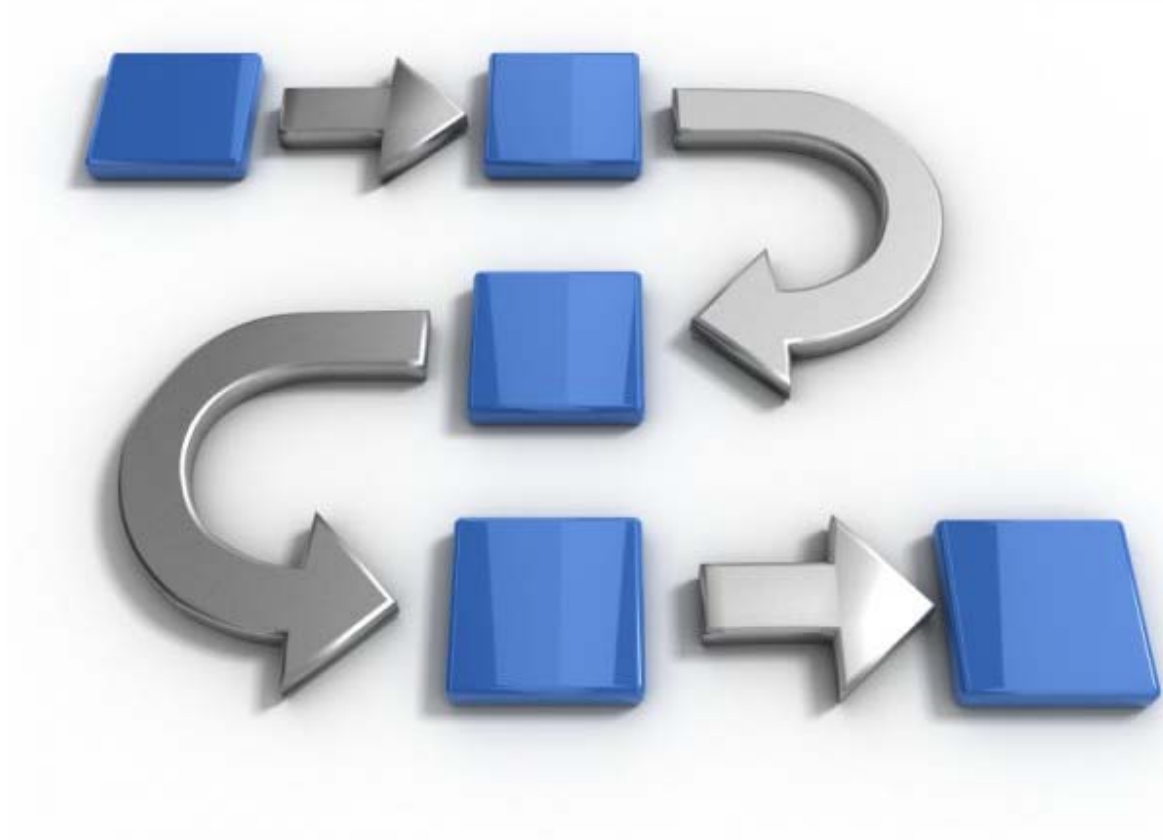
‘Treated You Fairly’

**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: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

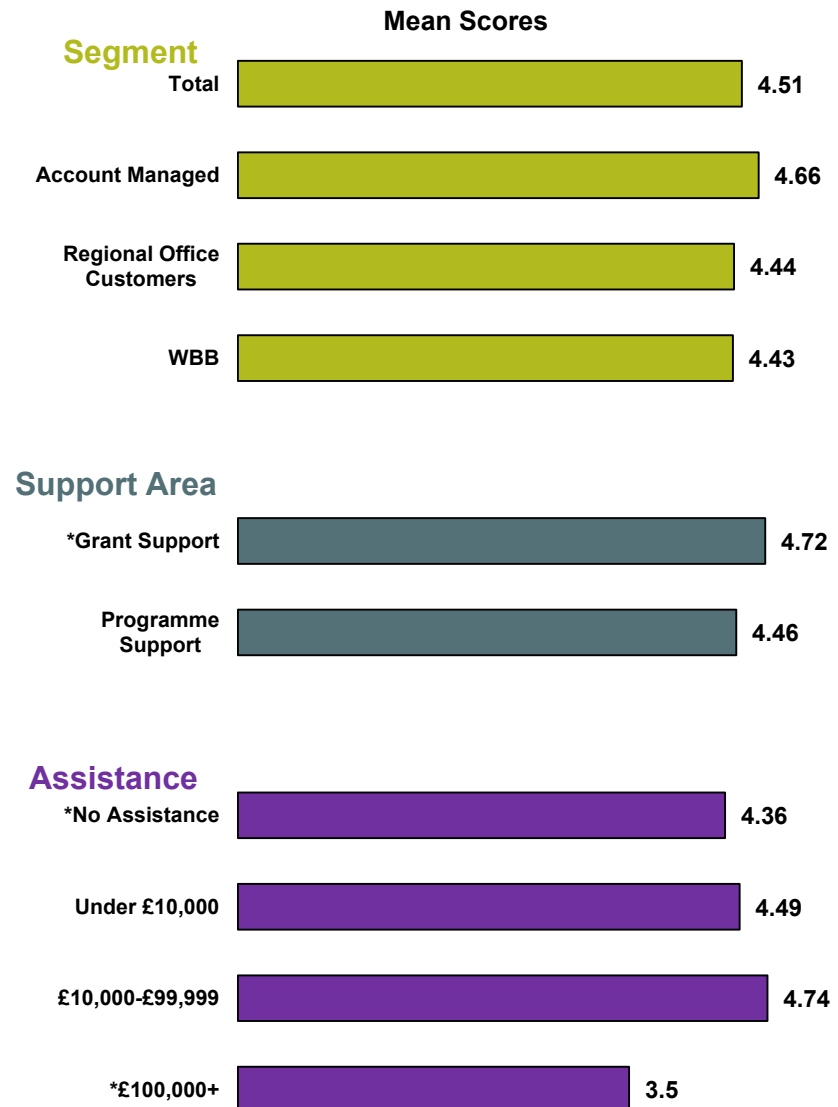
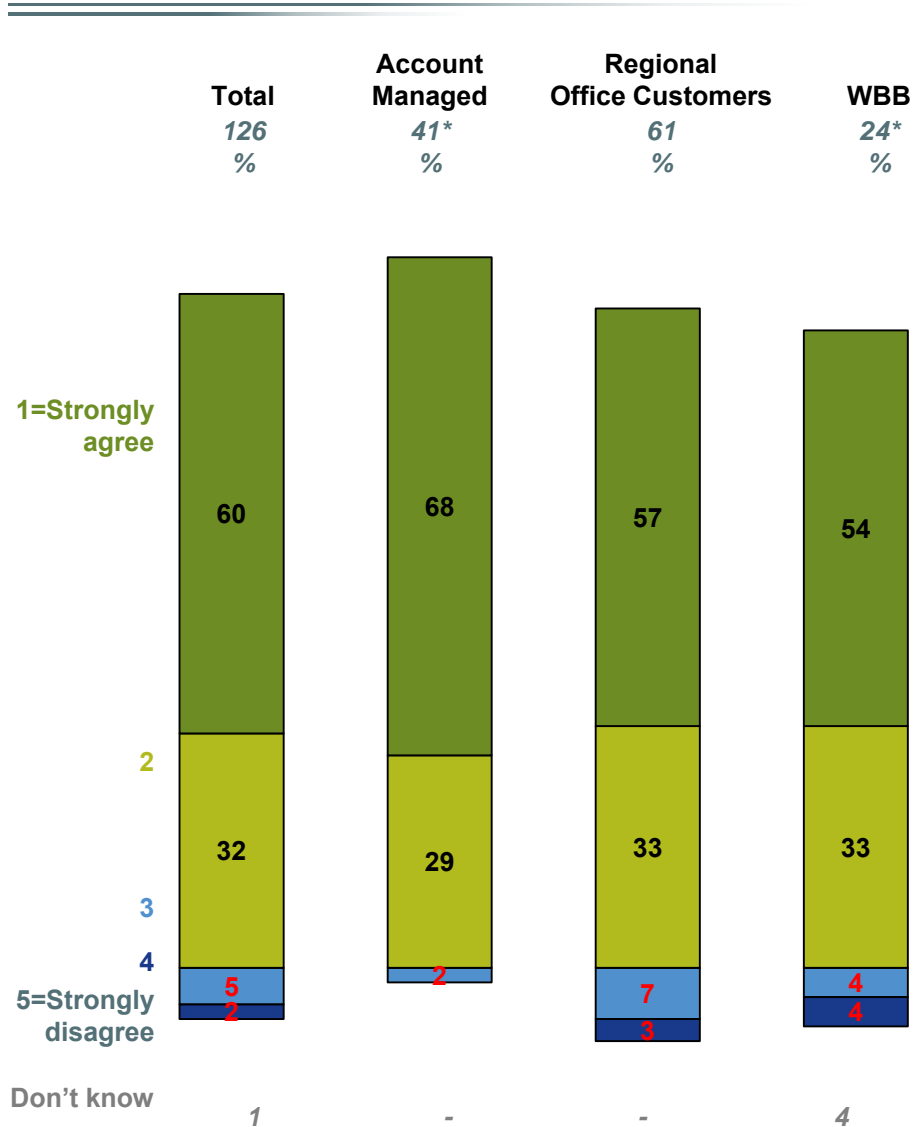
PROCESS MANAGEMENT



Key Performance Indicator – Process Management

‘Explained and agreed detailed requirements’

**Small Bases = less than 50*

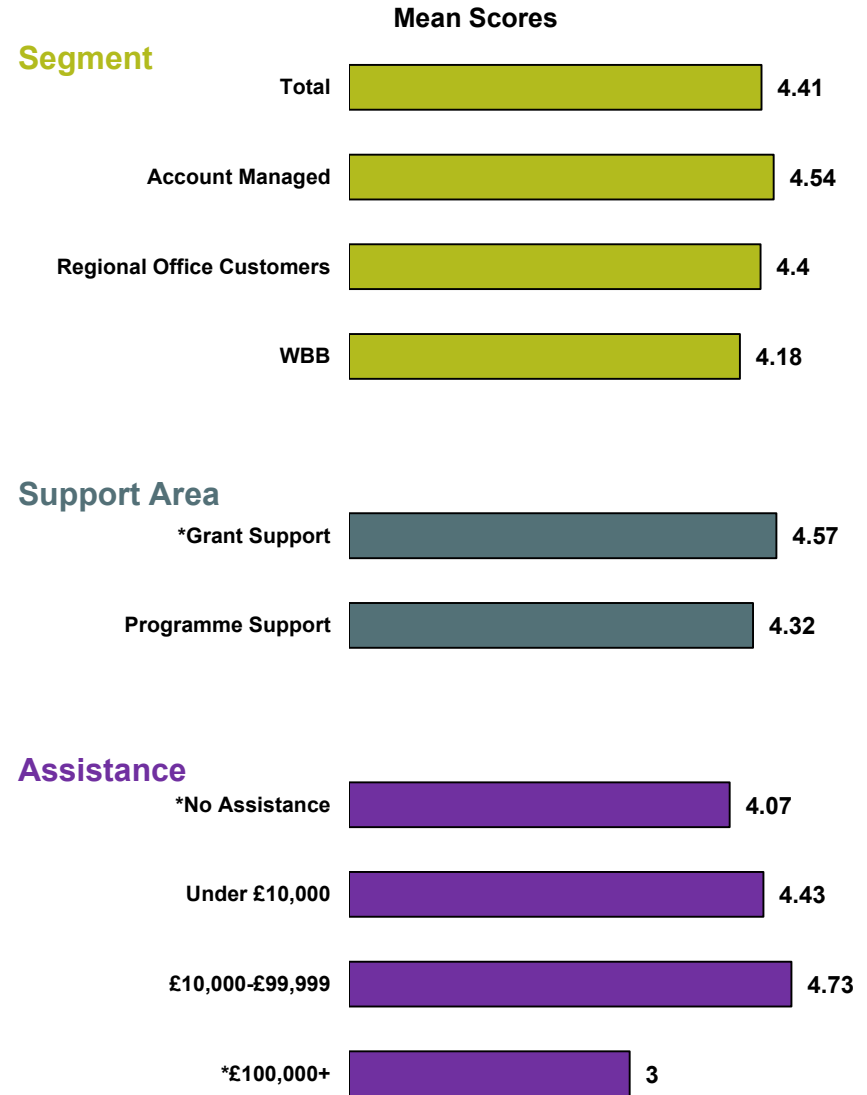
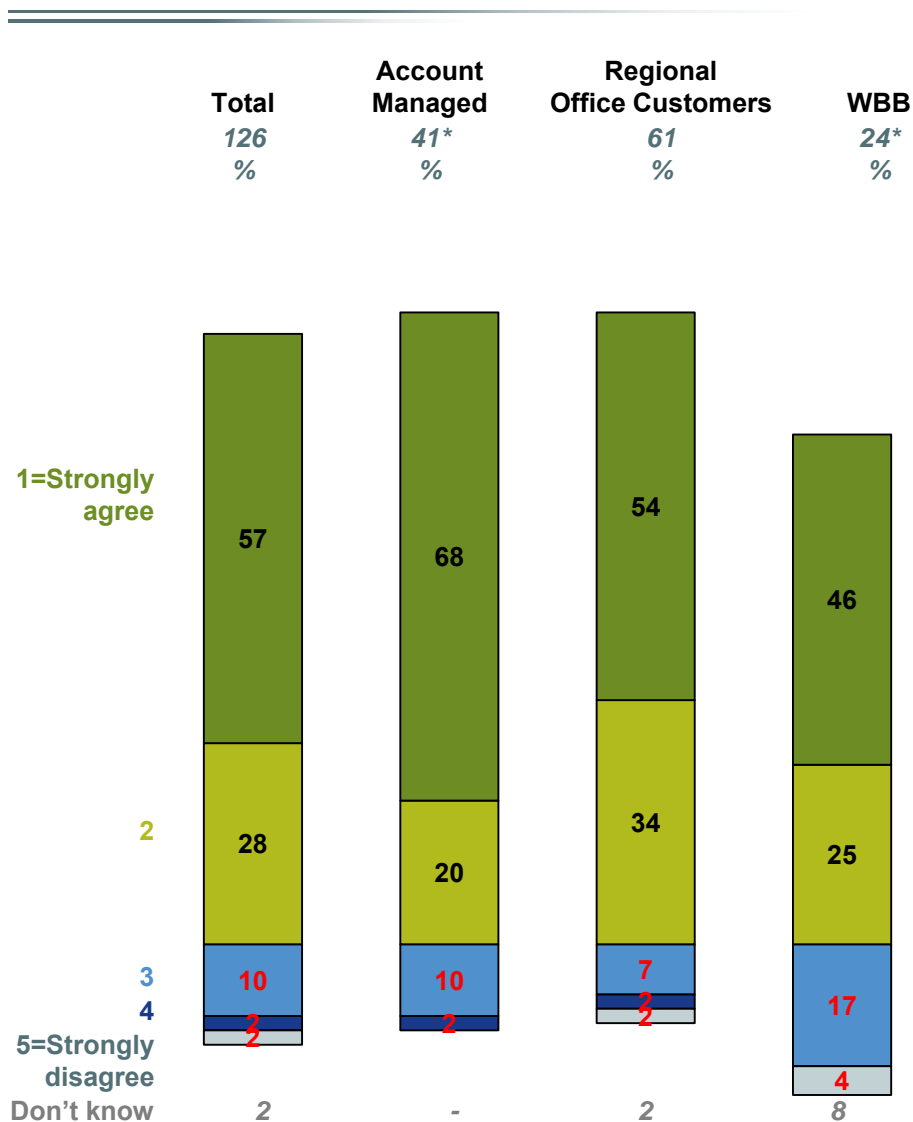


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Process Management

'Discussed and agreed a realistic timescale for planned activities'

**Small Bases = less than 50*

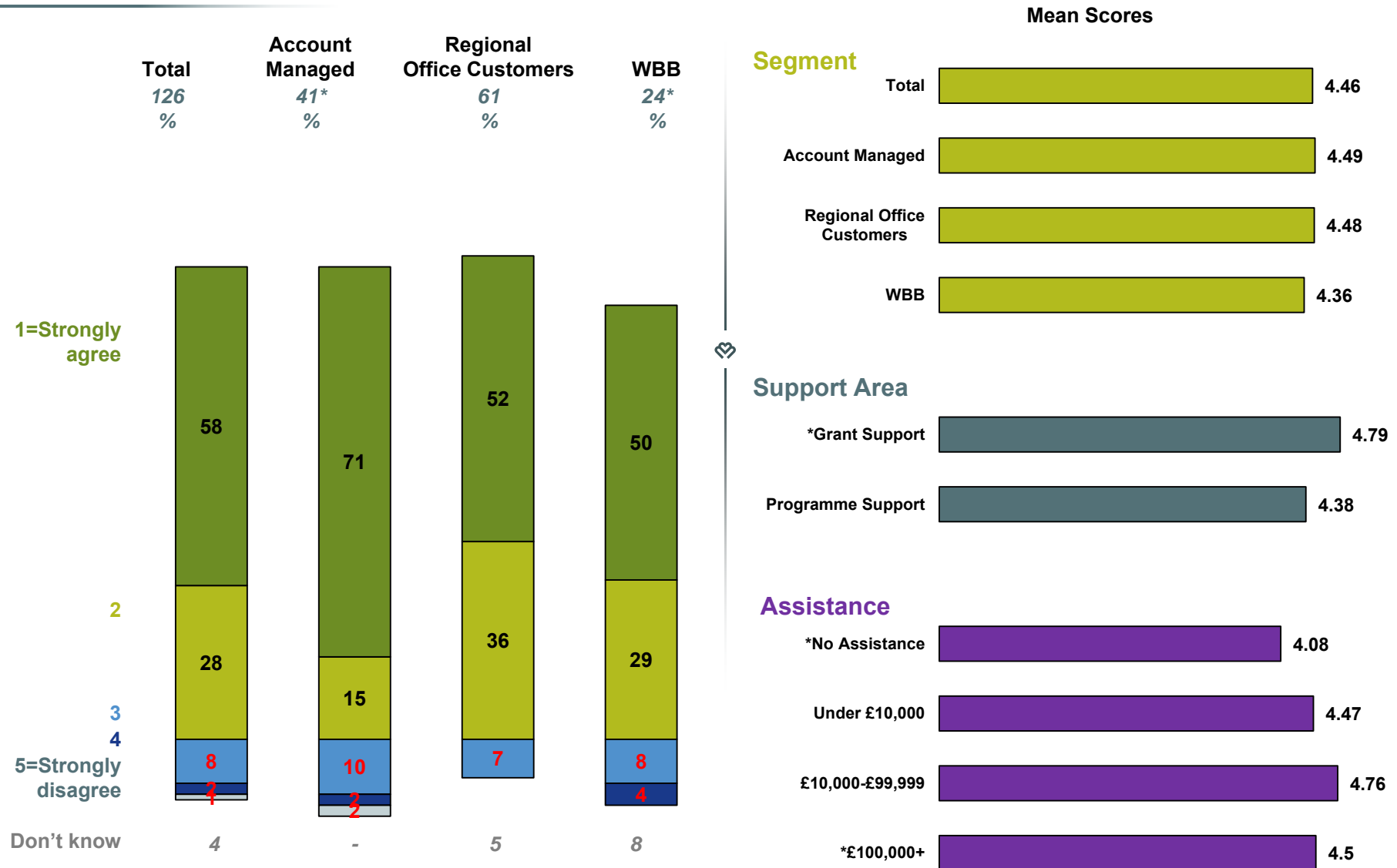


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Process Management

‘Completed activities according to the agreed timeline’

*Small Bases = less than 50

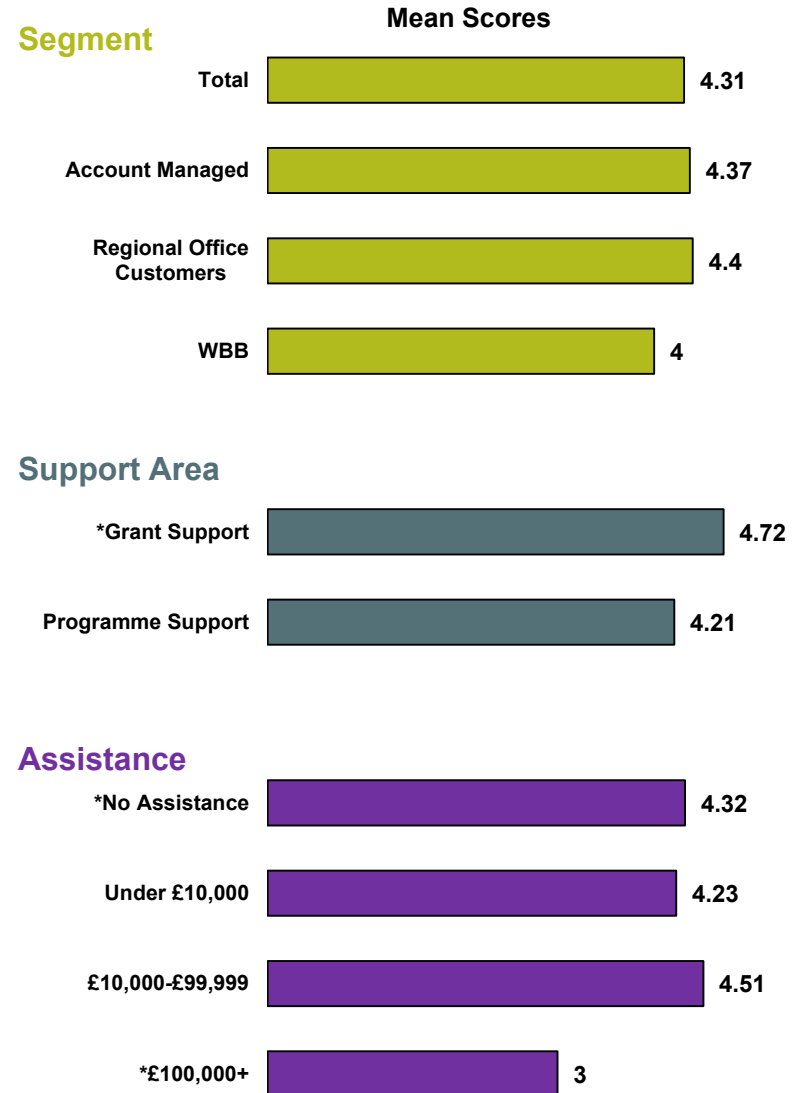
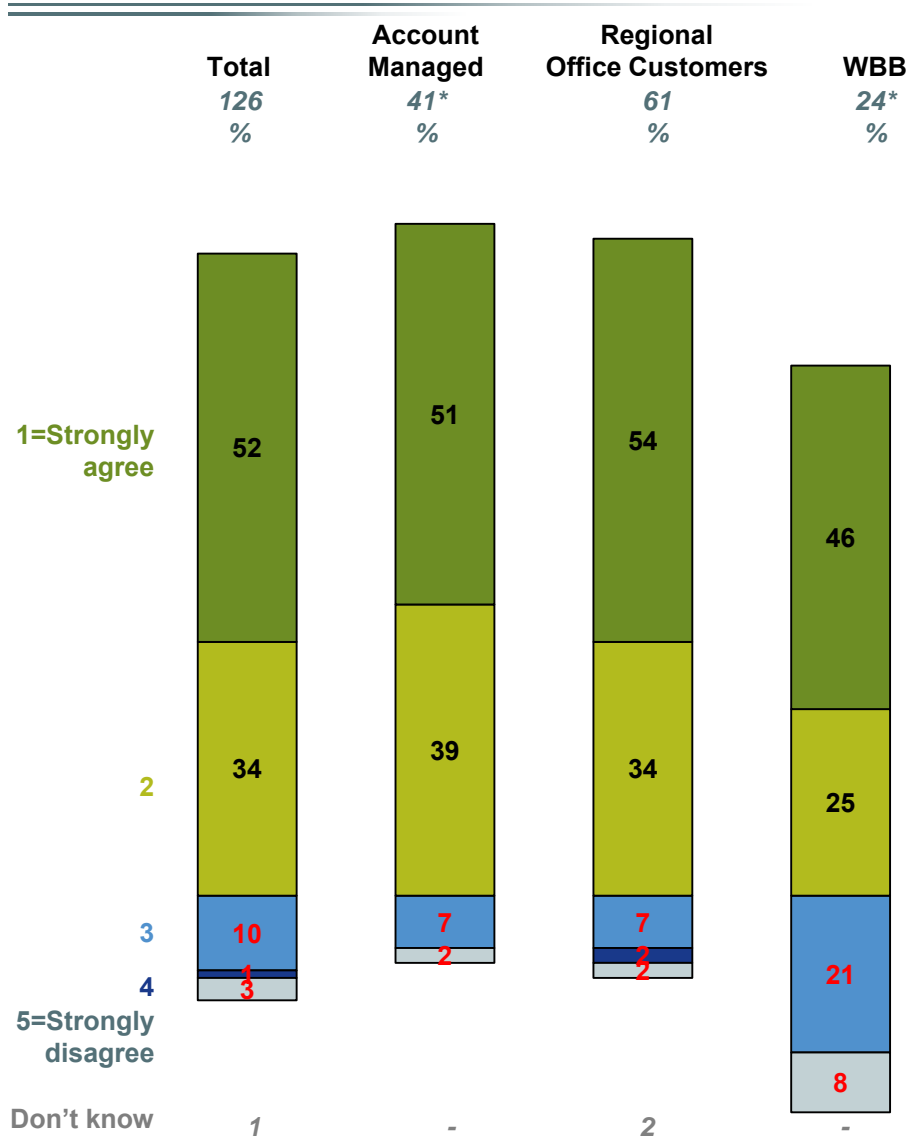


Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct’18-Dec’18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Process Management

'Was proactive in providing advice and support'

**Small Bases = less than 50*

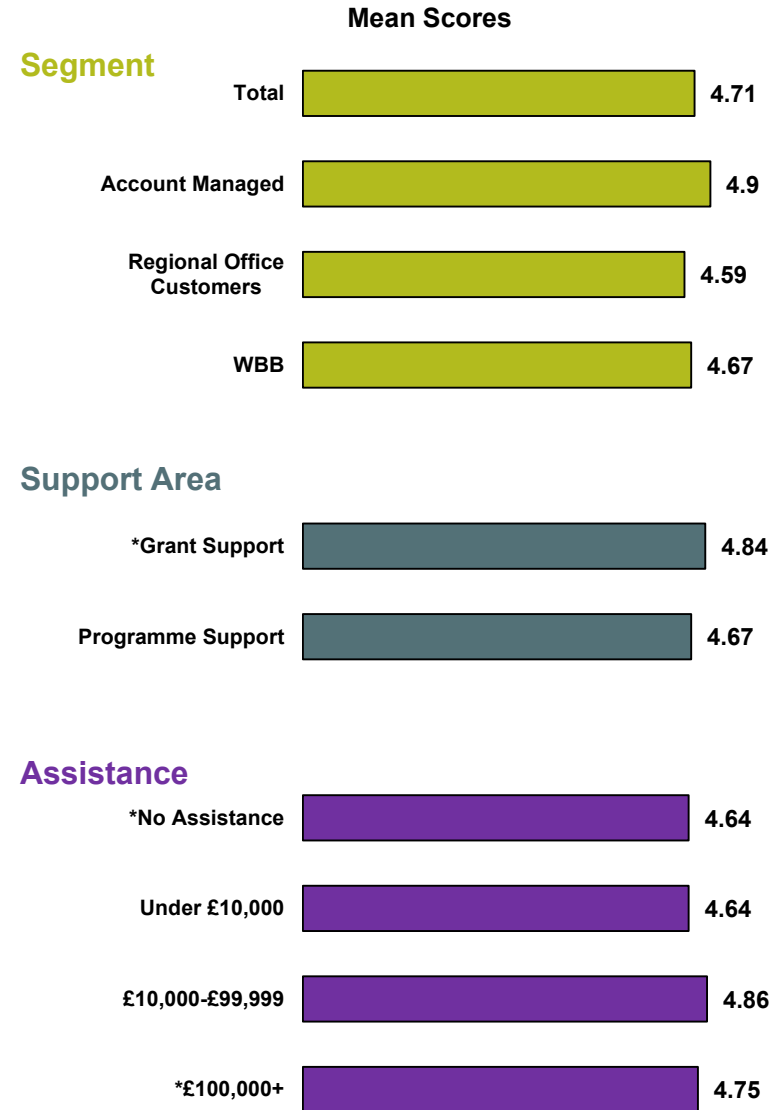
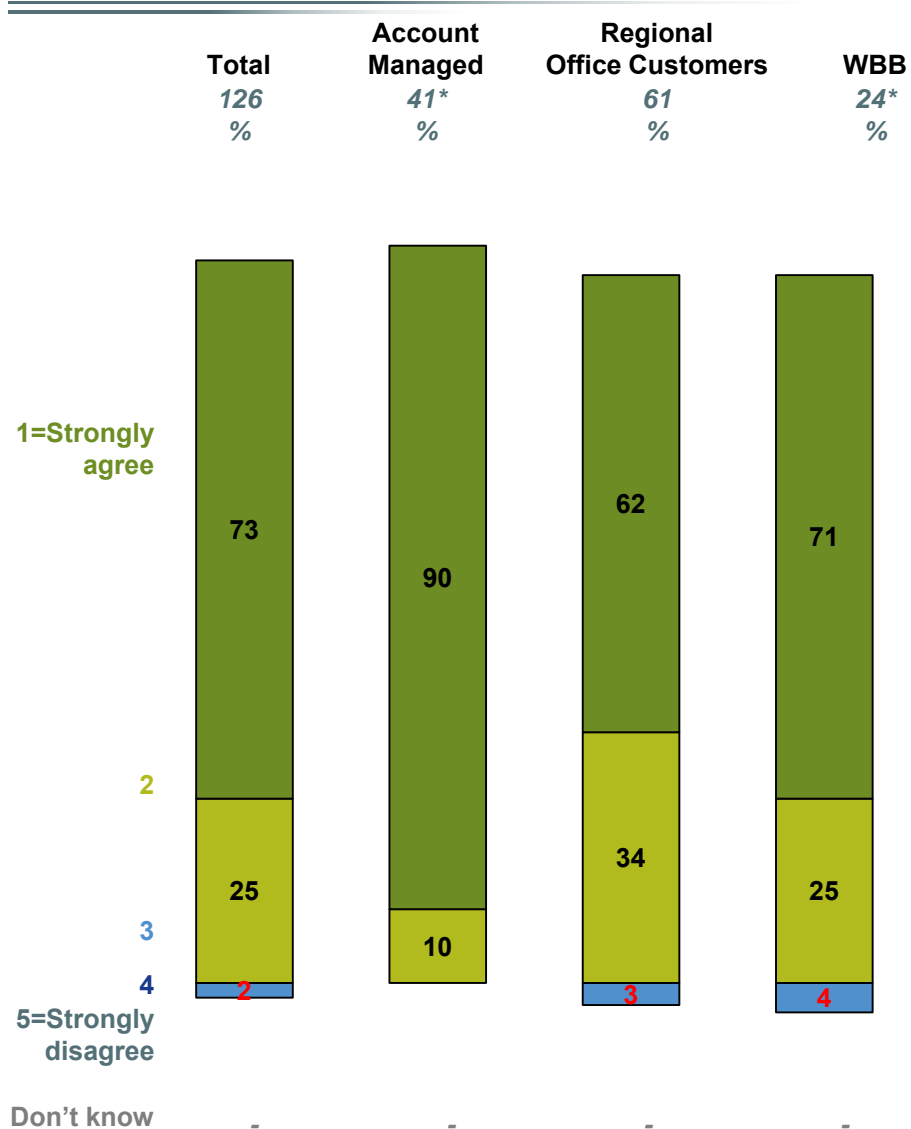


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

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: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

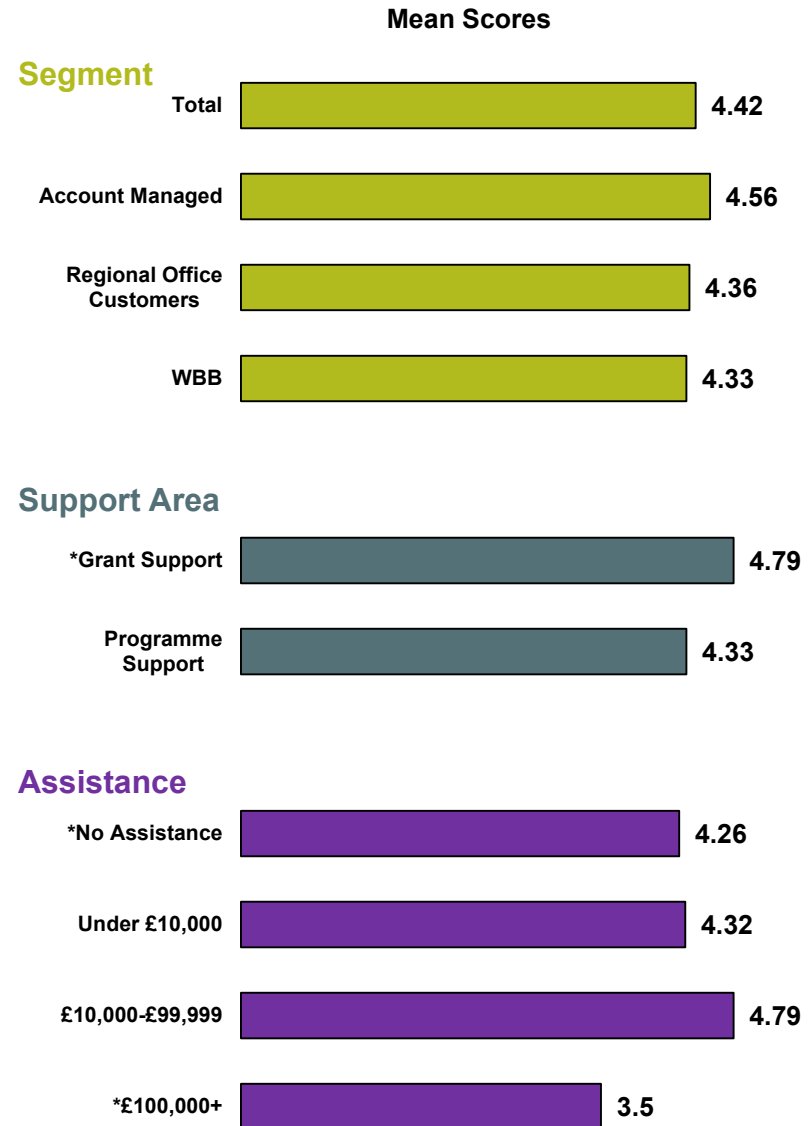
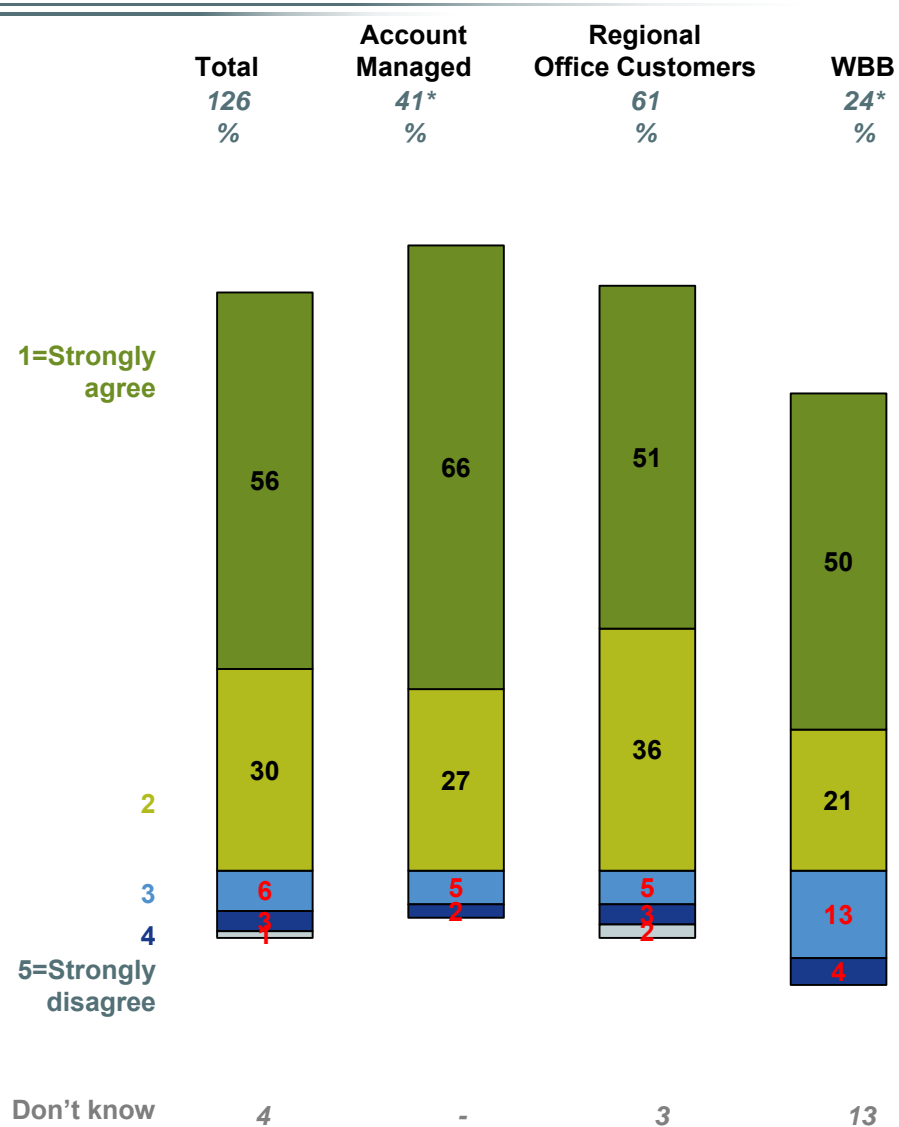
PROCESS COMMUNICATION



Key Performance Indicator – Process Communication

‘Kept you informed of progress throughout the process’

**Small Bases = less than 50*

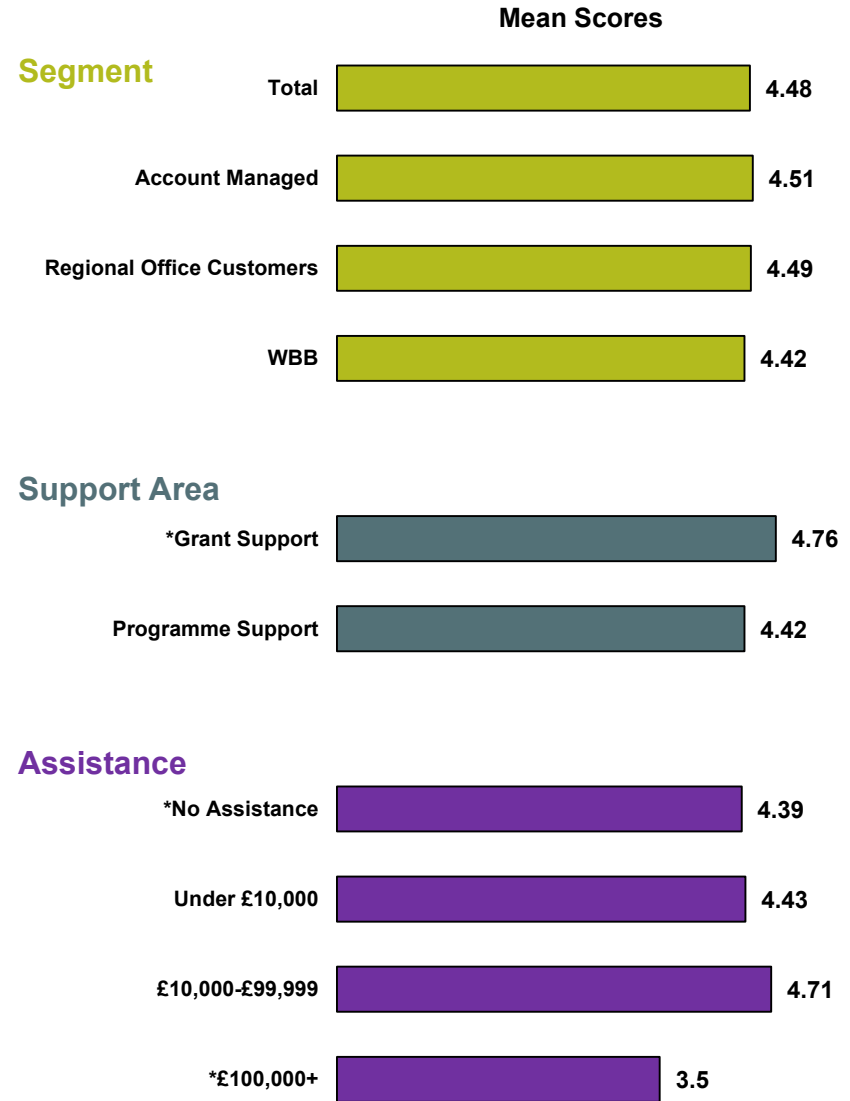
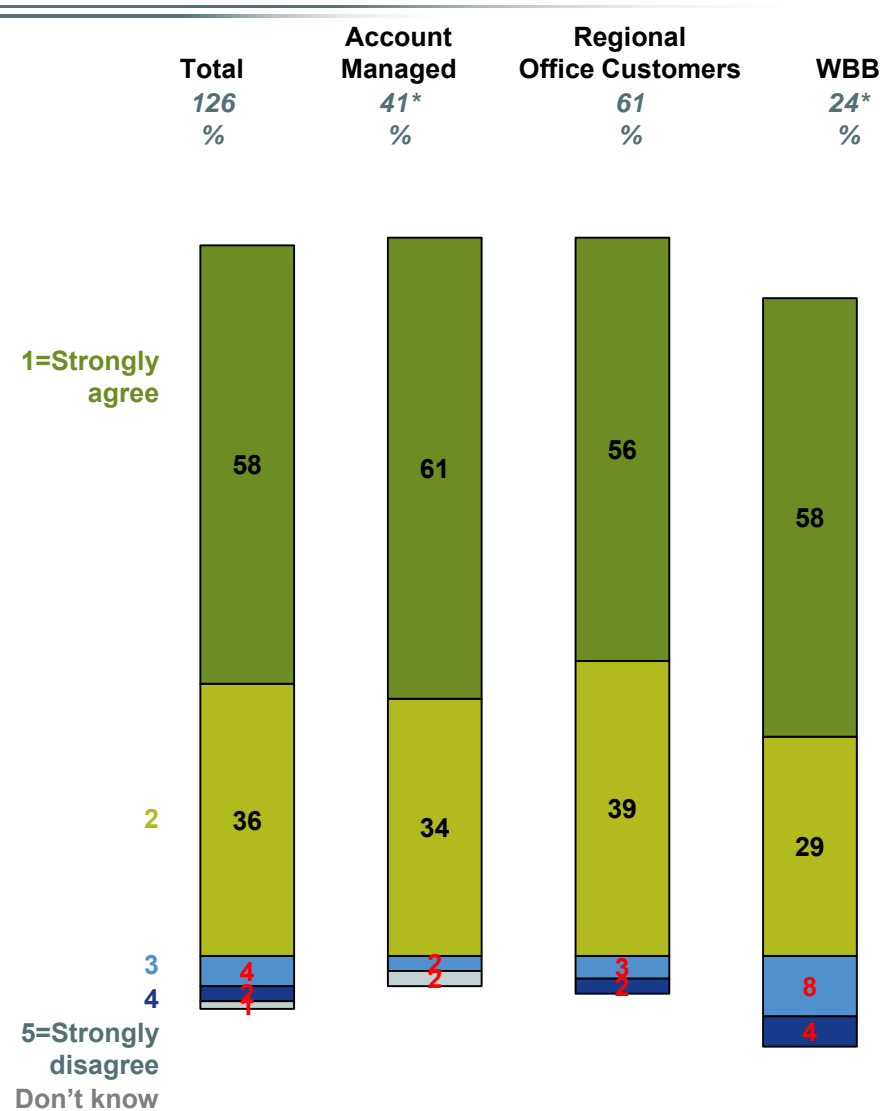


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Process Communication

‘Responded to your queries within a reasonable timeframe’

**Small Bases = less than 50*

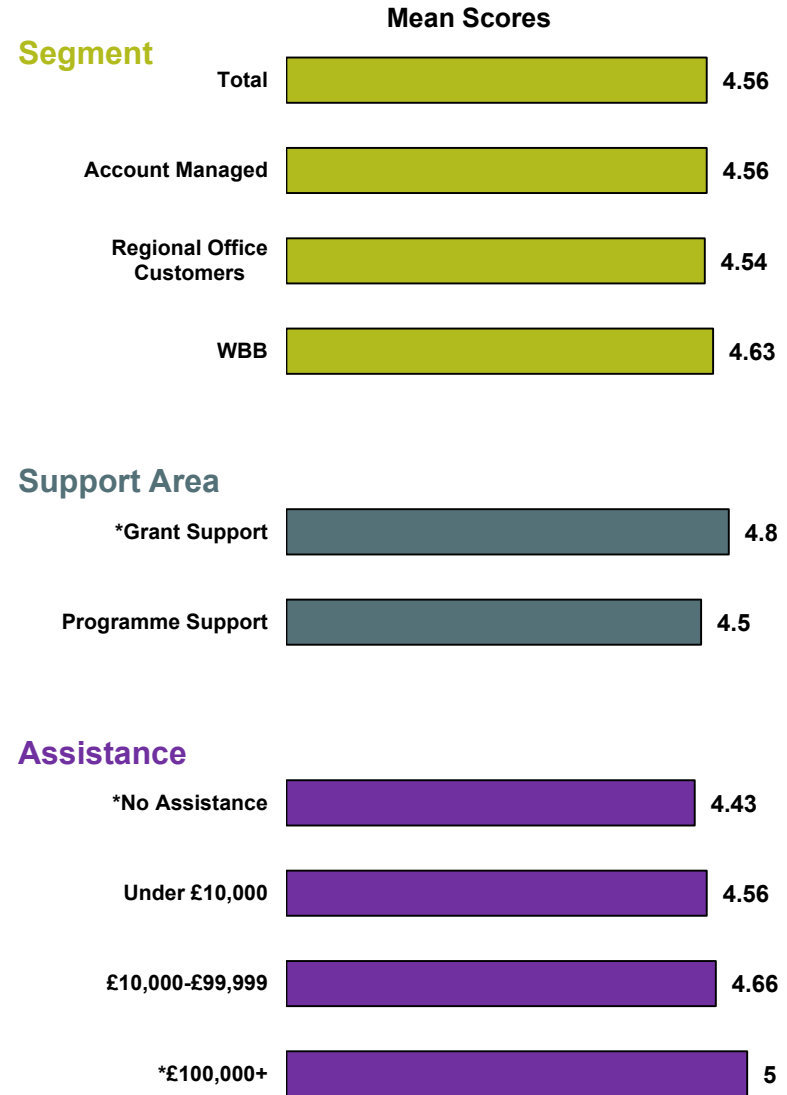
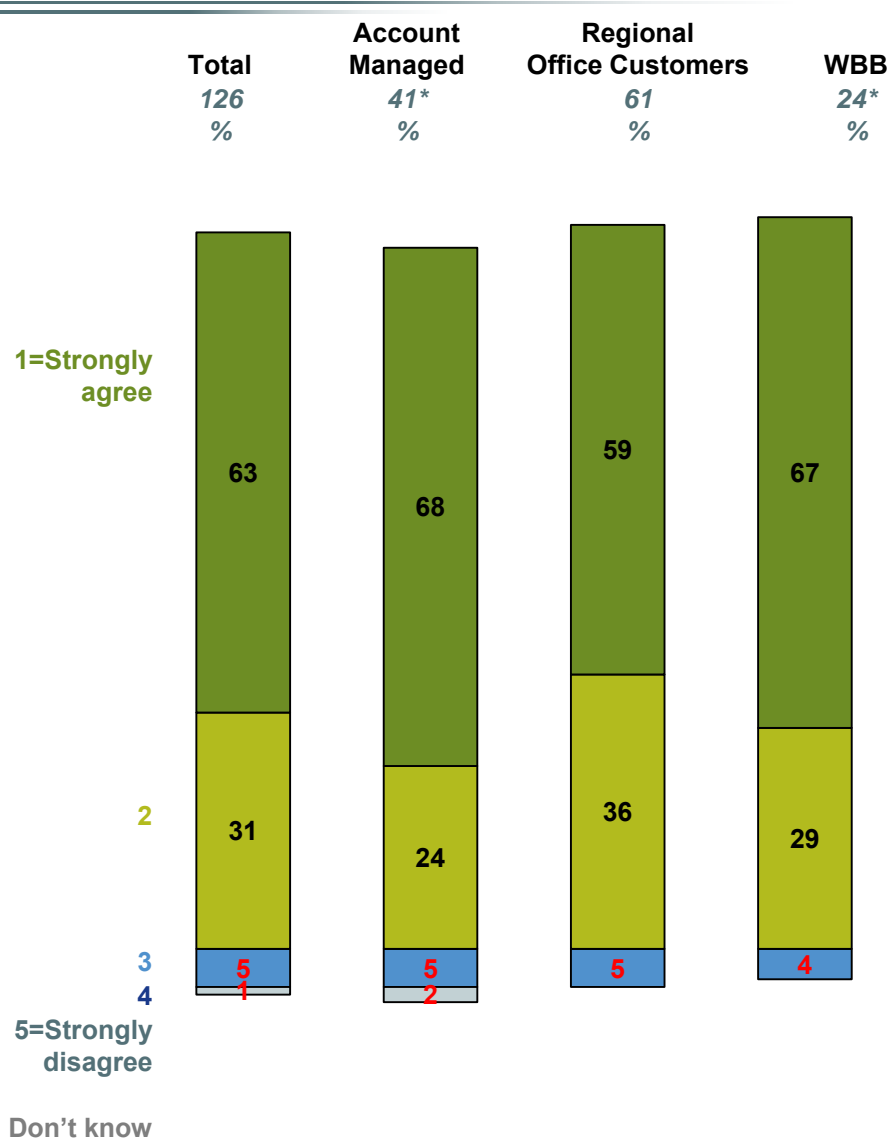


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Process Communication

‘Used clear and effective communication’

*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: 126 Oct’18-Dec’18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

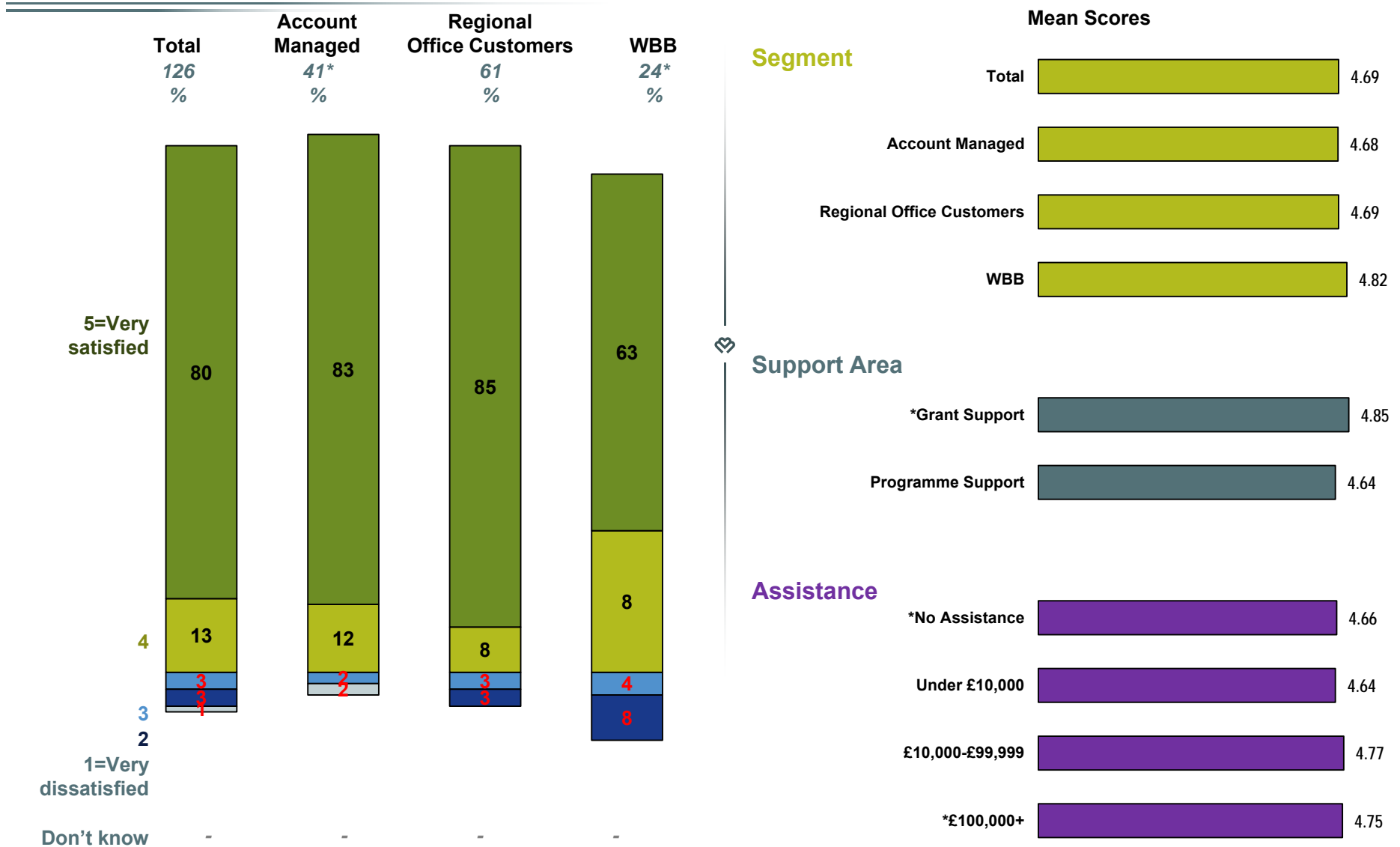
PEOPLE



Key Performance Indicator – People

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

*Small Bases = less than 50

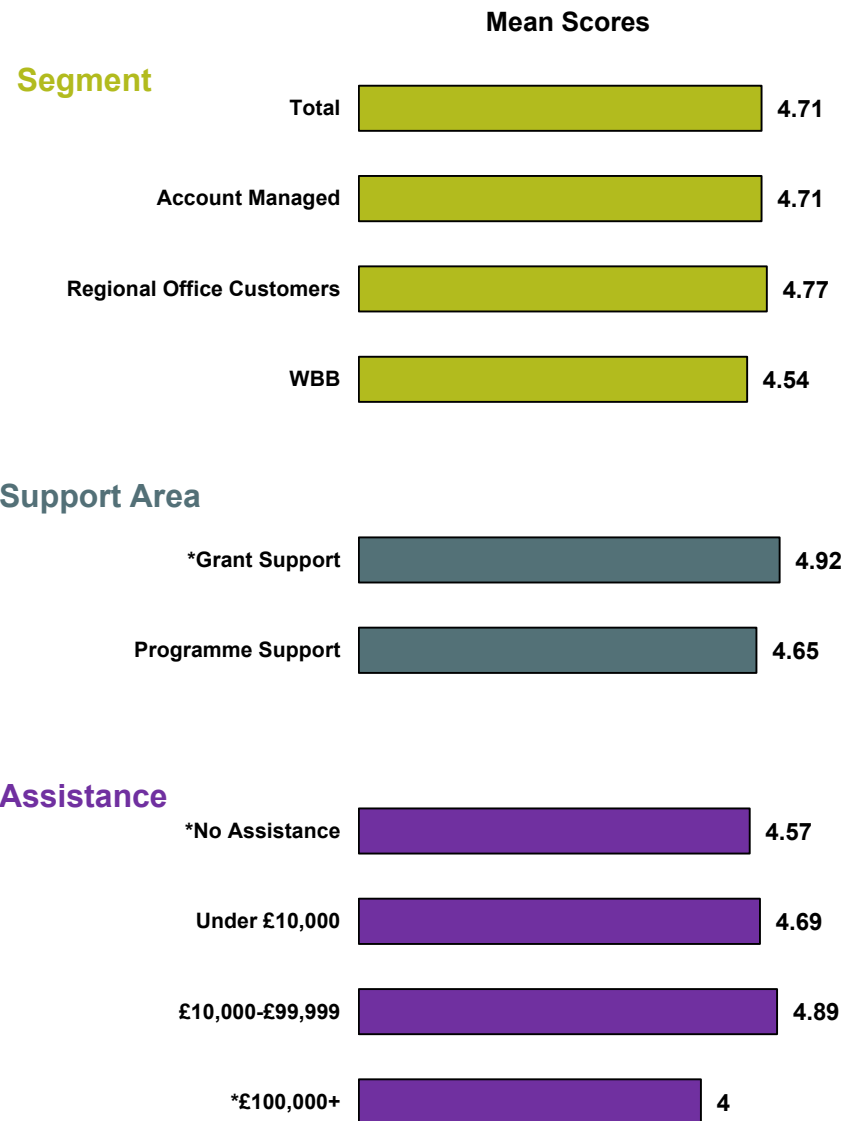
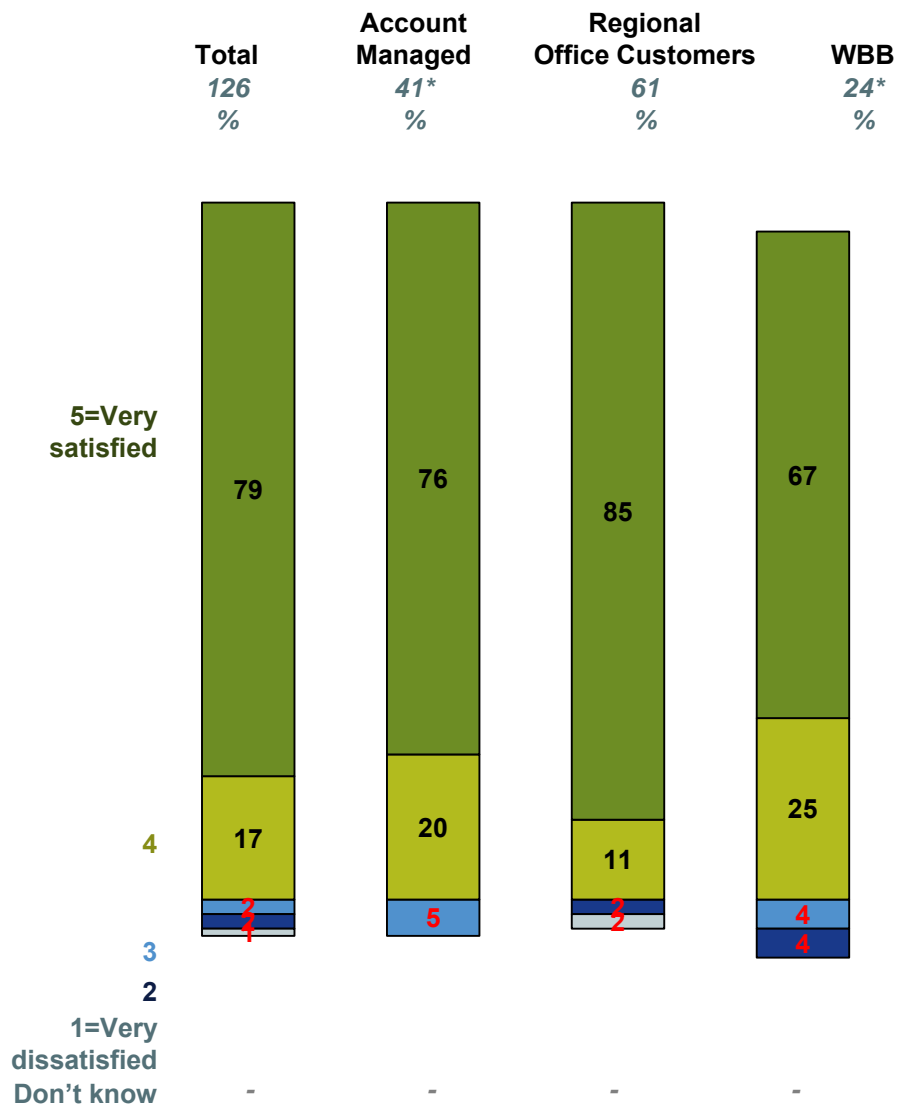


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

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'

*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: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

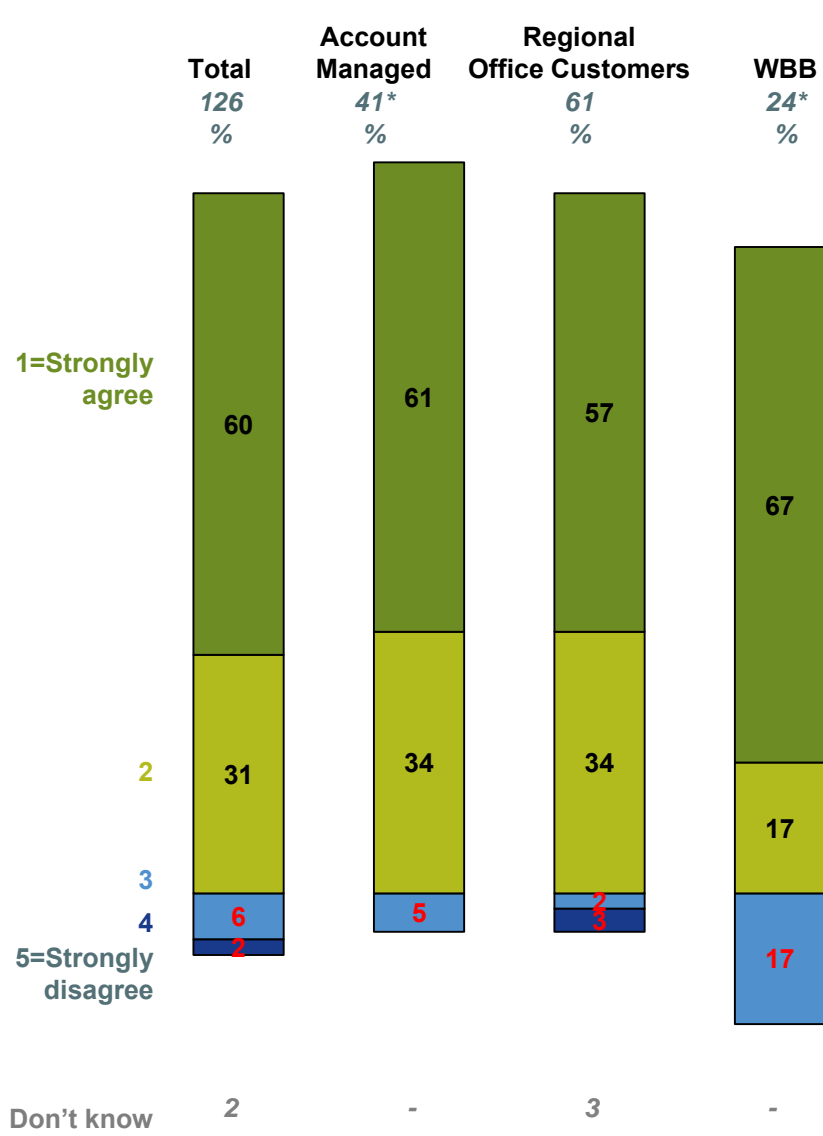
PERFORMANCE



Key Performance Indicator – Performance

‘The Invest NI team is helping to develop my business’

*Small Bases = less than 50

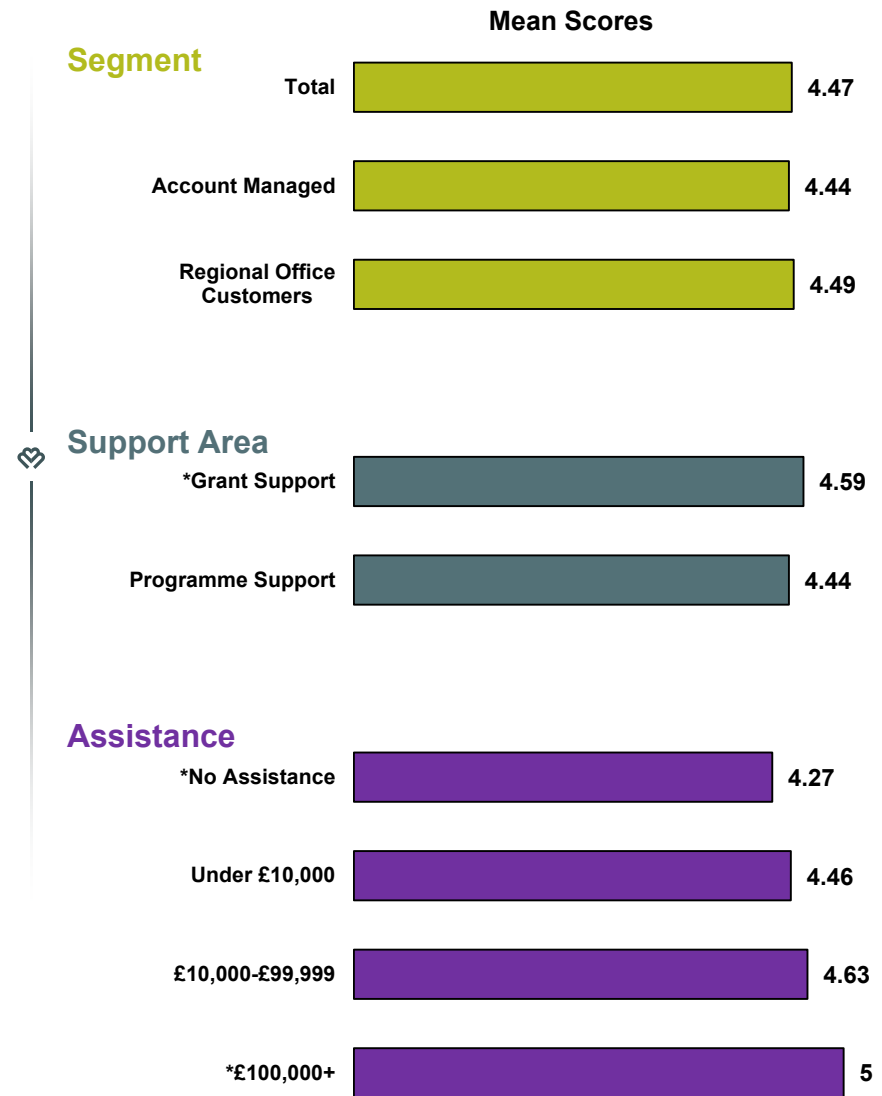
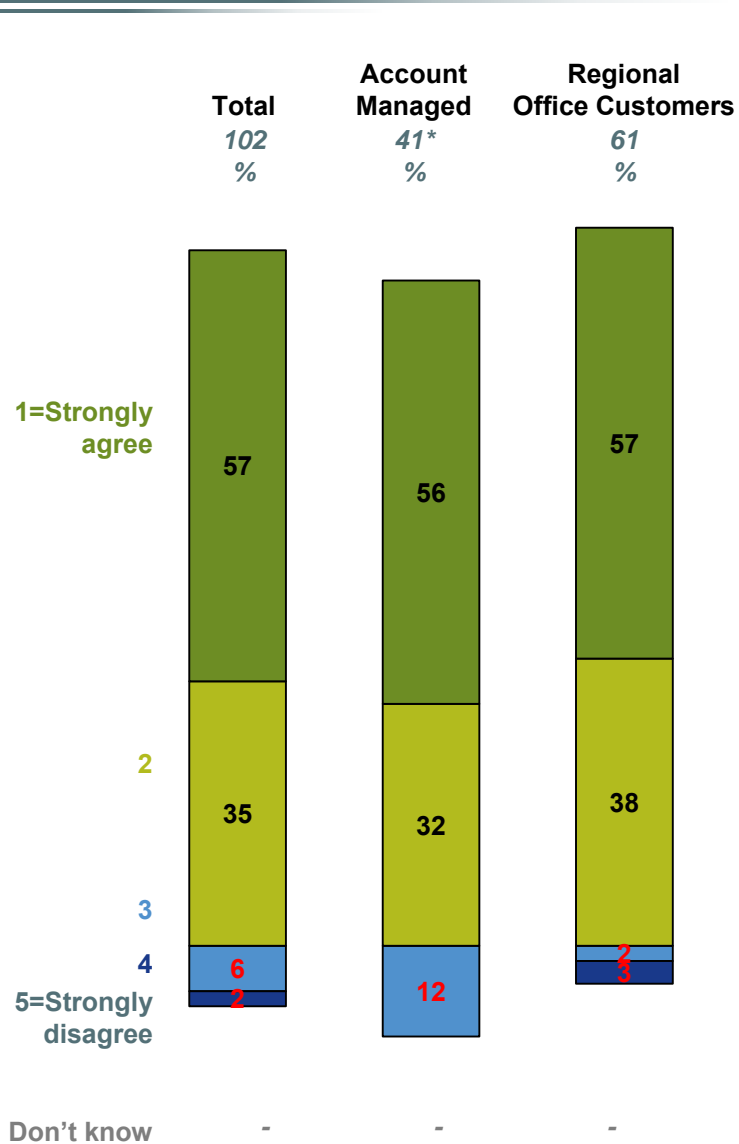


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Performance

'I view Invest NI as a strategic partner supporting my business'

**Small Bases = less than 50*

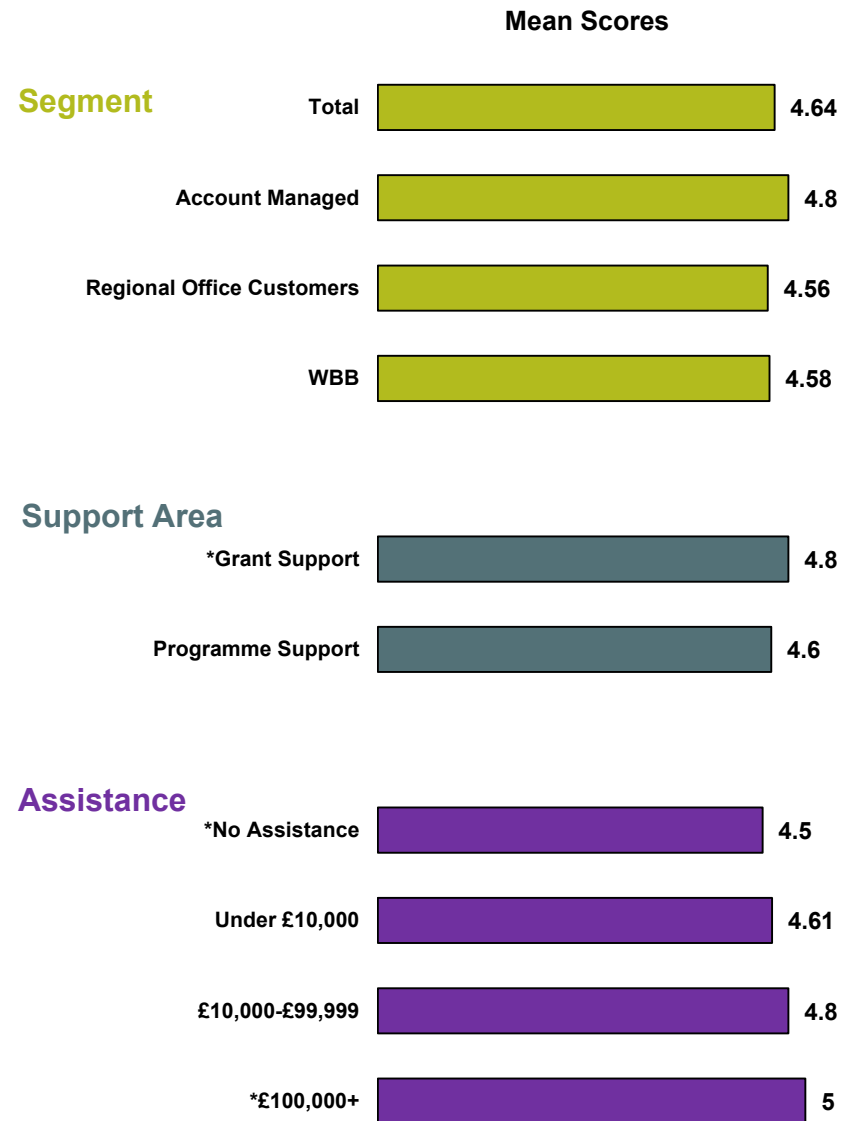
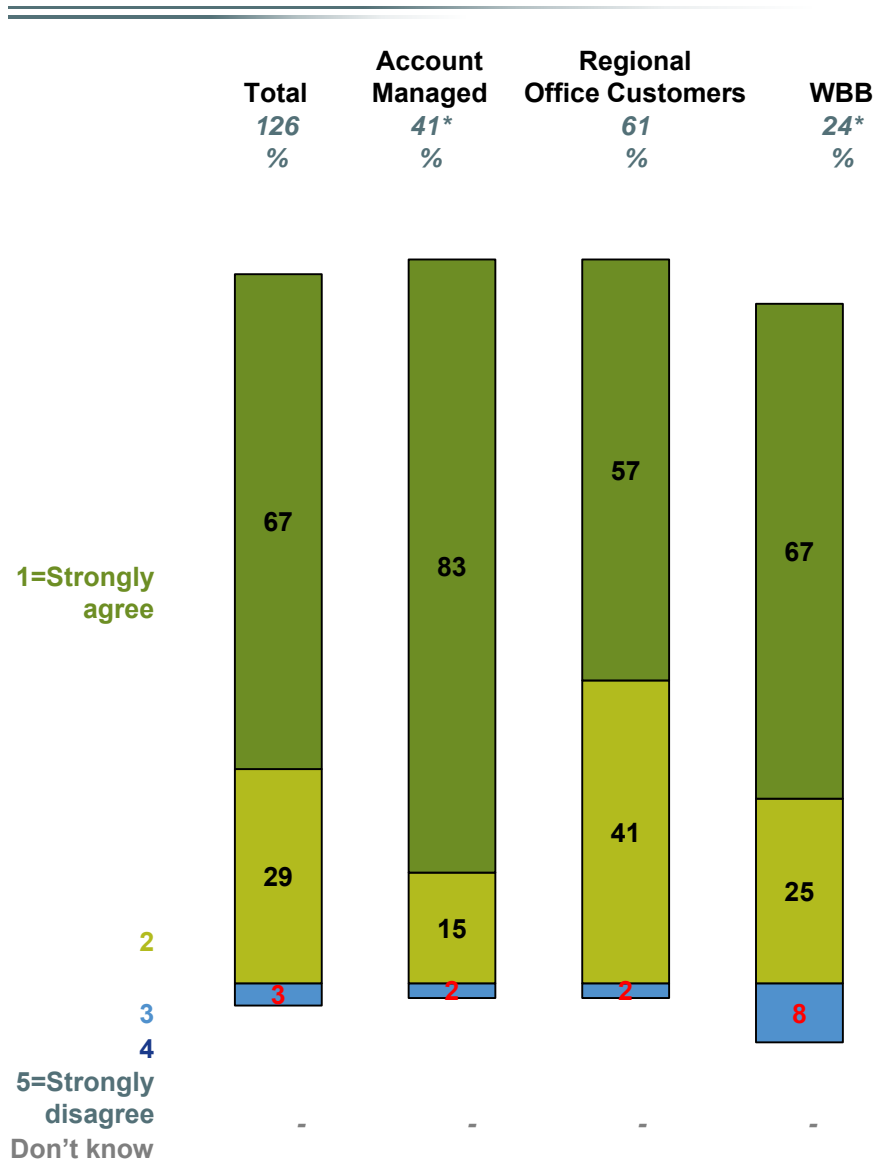


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 102 Jul'18-Sept'18 (41* Account Managed and 61 Regional Office Customers)]

Key Performance Indicator – Performance

‘Invest NI acts with professionalism and integrity’

**Small Bases = less than 50*

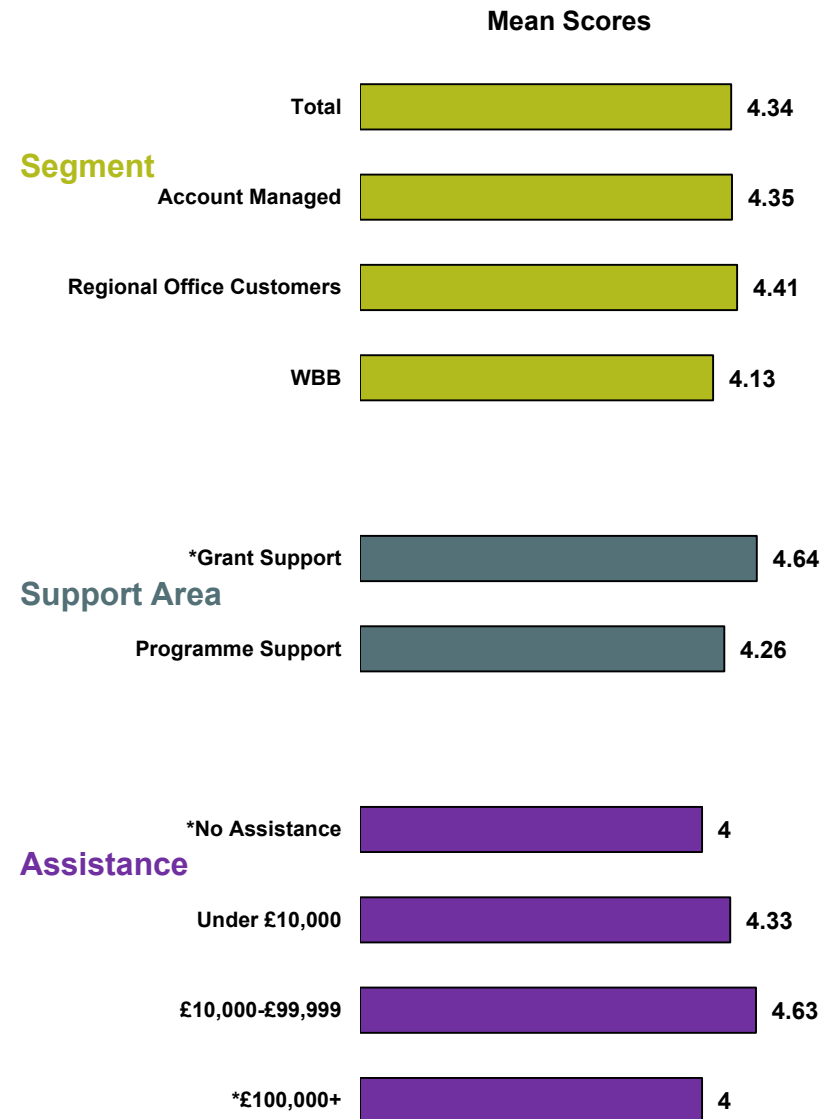
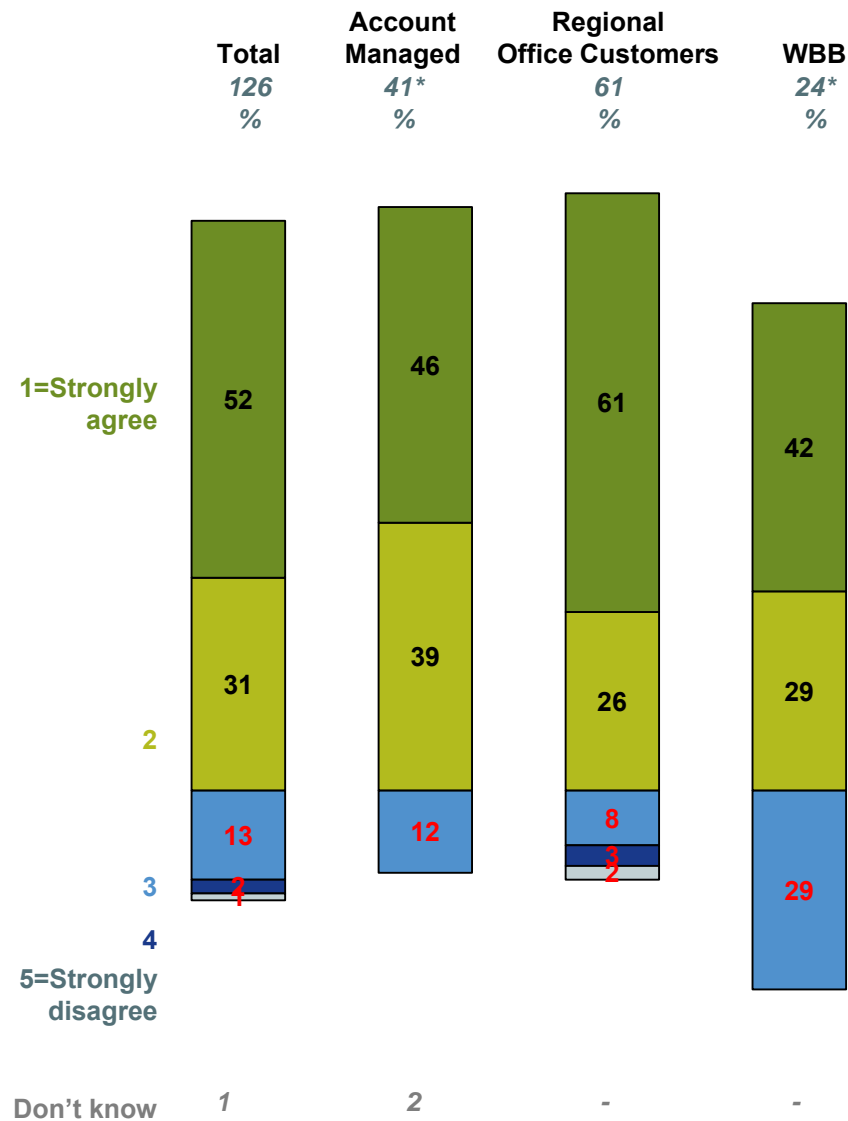


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Performance

'Invest NI exceeded my expectations'

**Small Bases = less than 50*

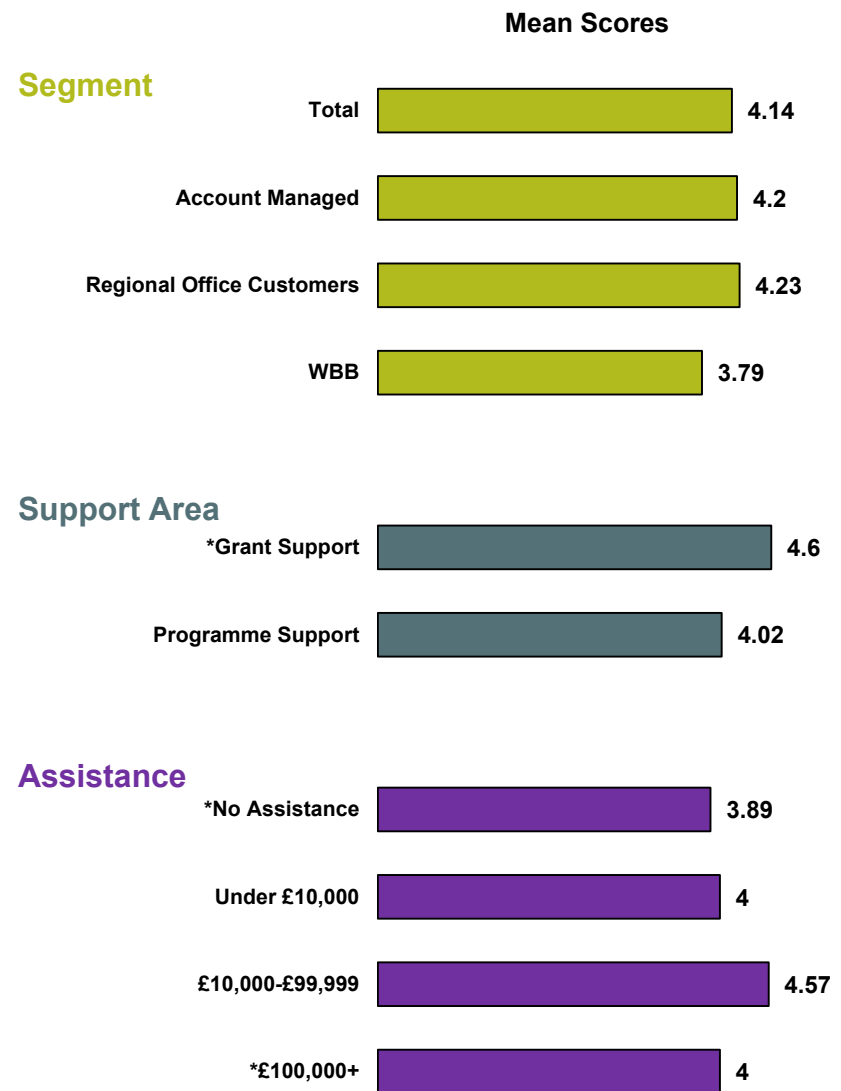
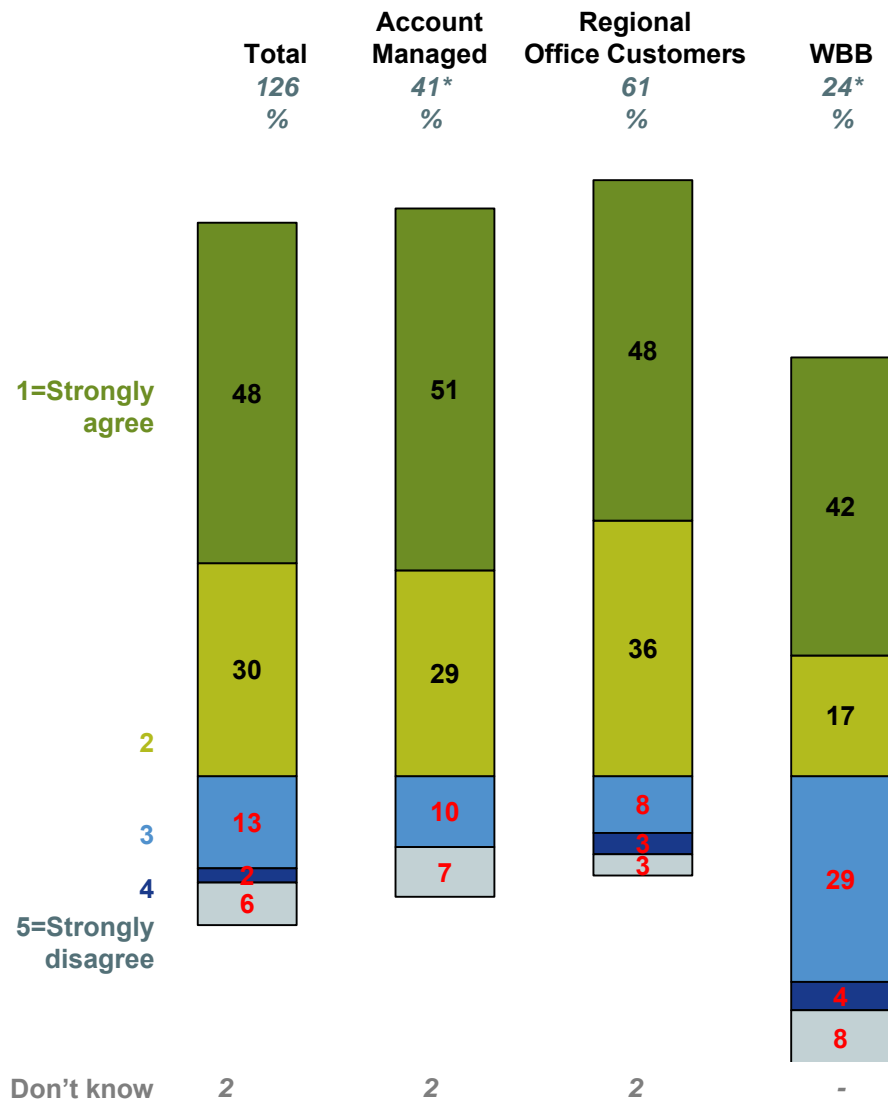


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Performance

'I received information on additional support programmes that are available from Invest NI'

**Small Bases = less than 50*

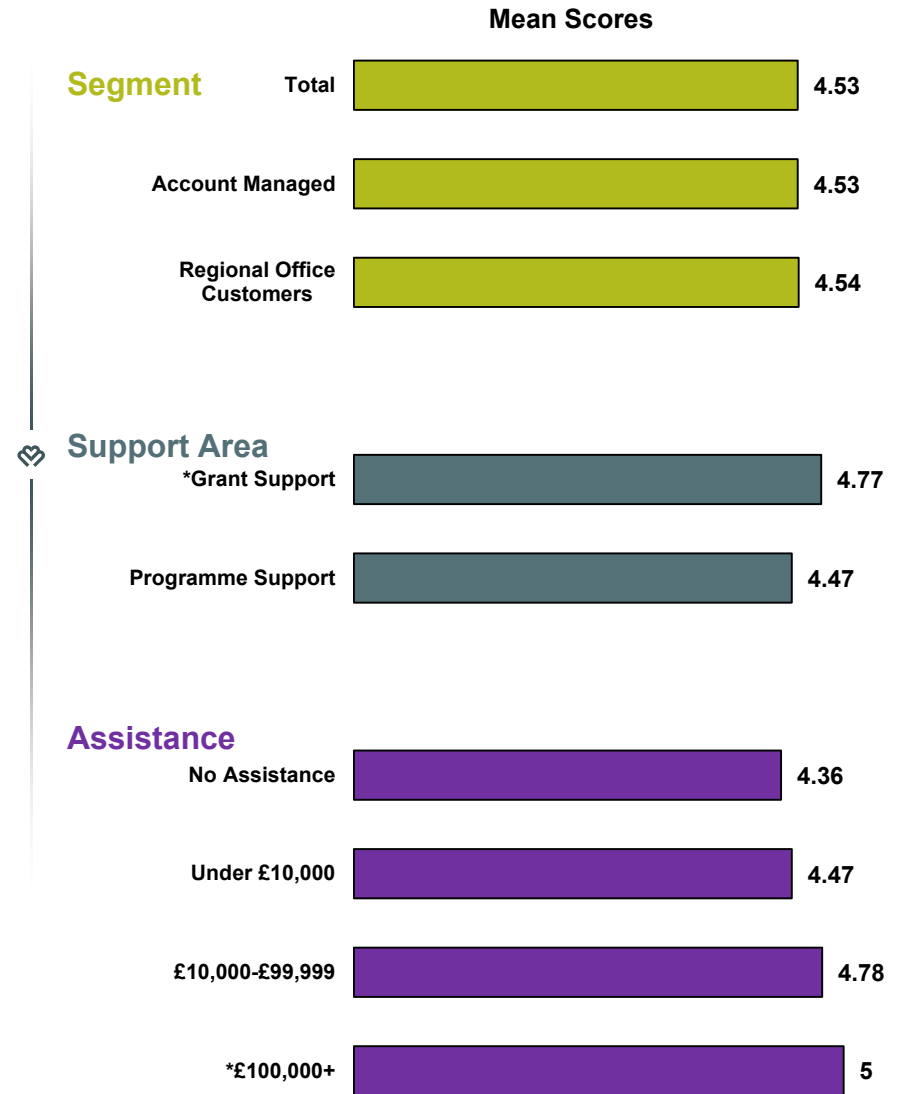
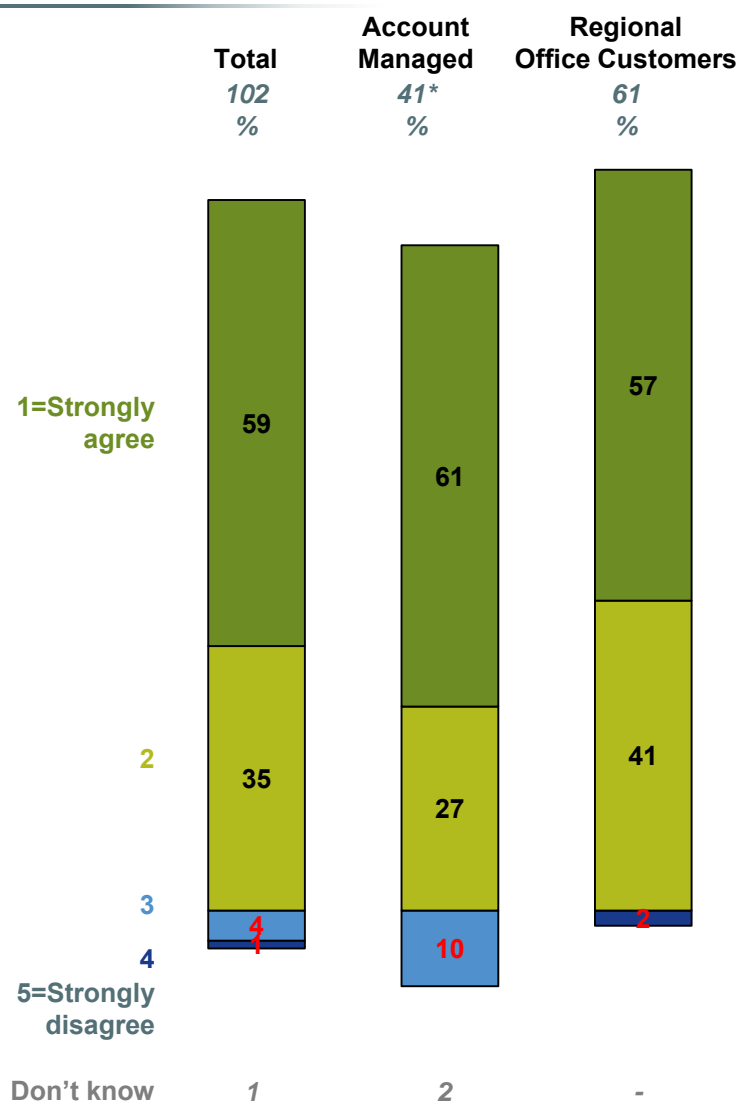


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Performance

'I am clear on my business development journey with Invest NI in terms of future support services that I am considering using'

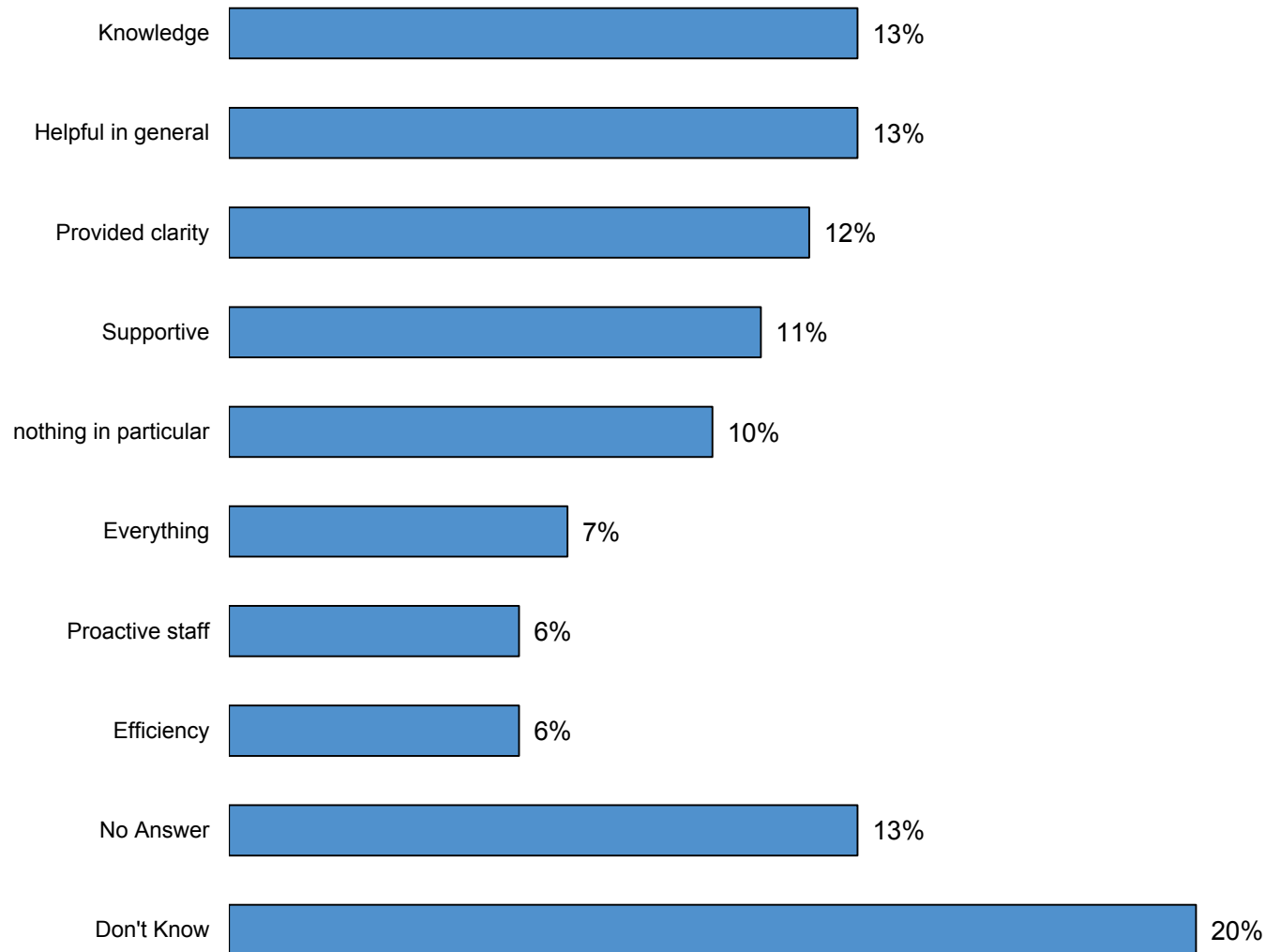
**Small Bases = less than 50*



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: 102 Jul'18-Sept'18 (41* Account Managed and 61 Regional Office Customers)]

Key Performance Indicator – Performance

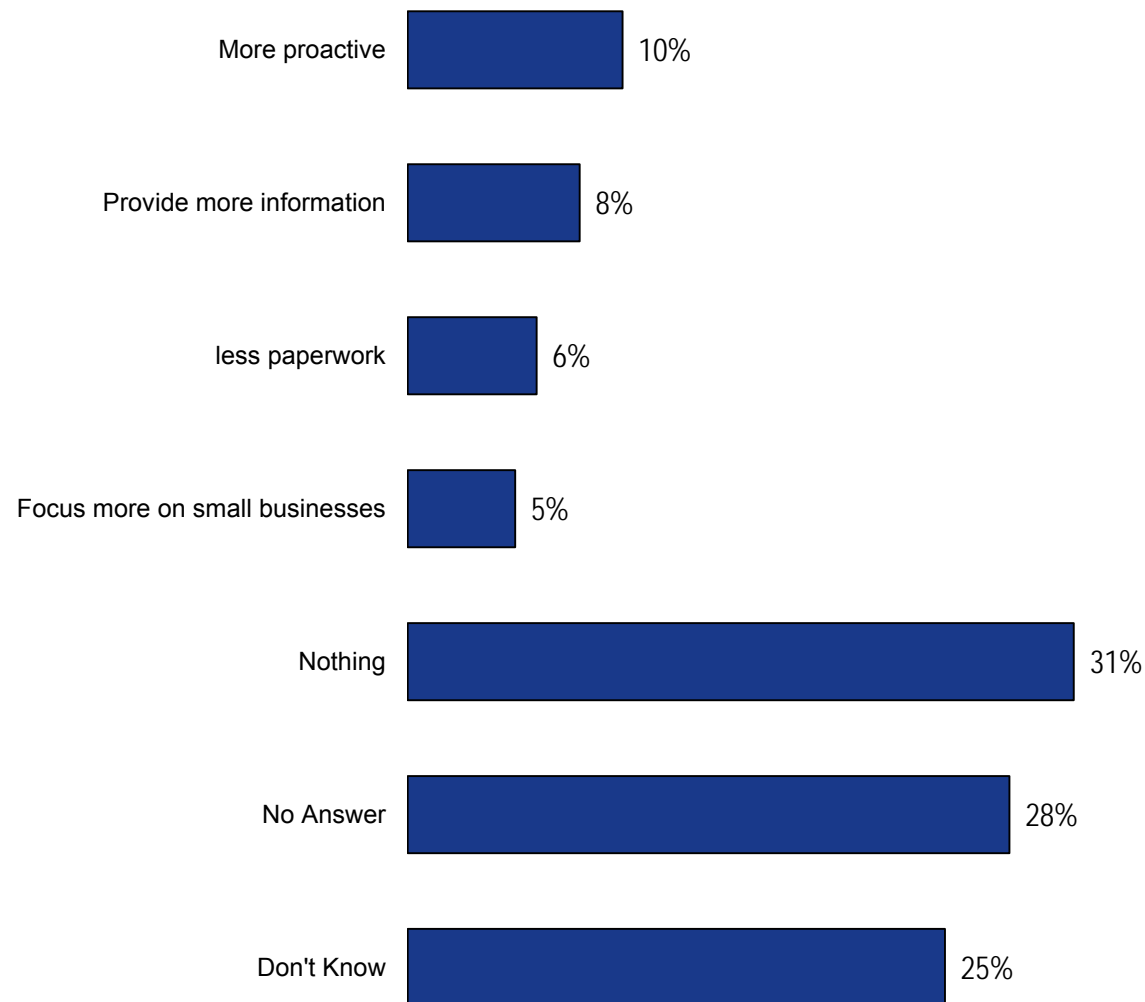
‘What Invest NI did particularly well’



Is there anything that you think Invest NI did particularly well in the lead up to your offer of assistance?
[Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Performance

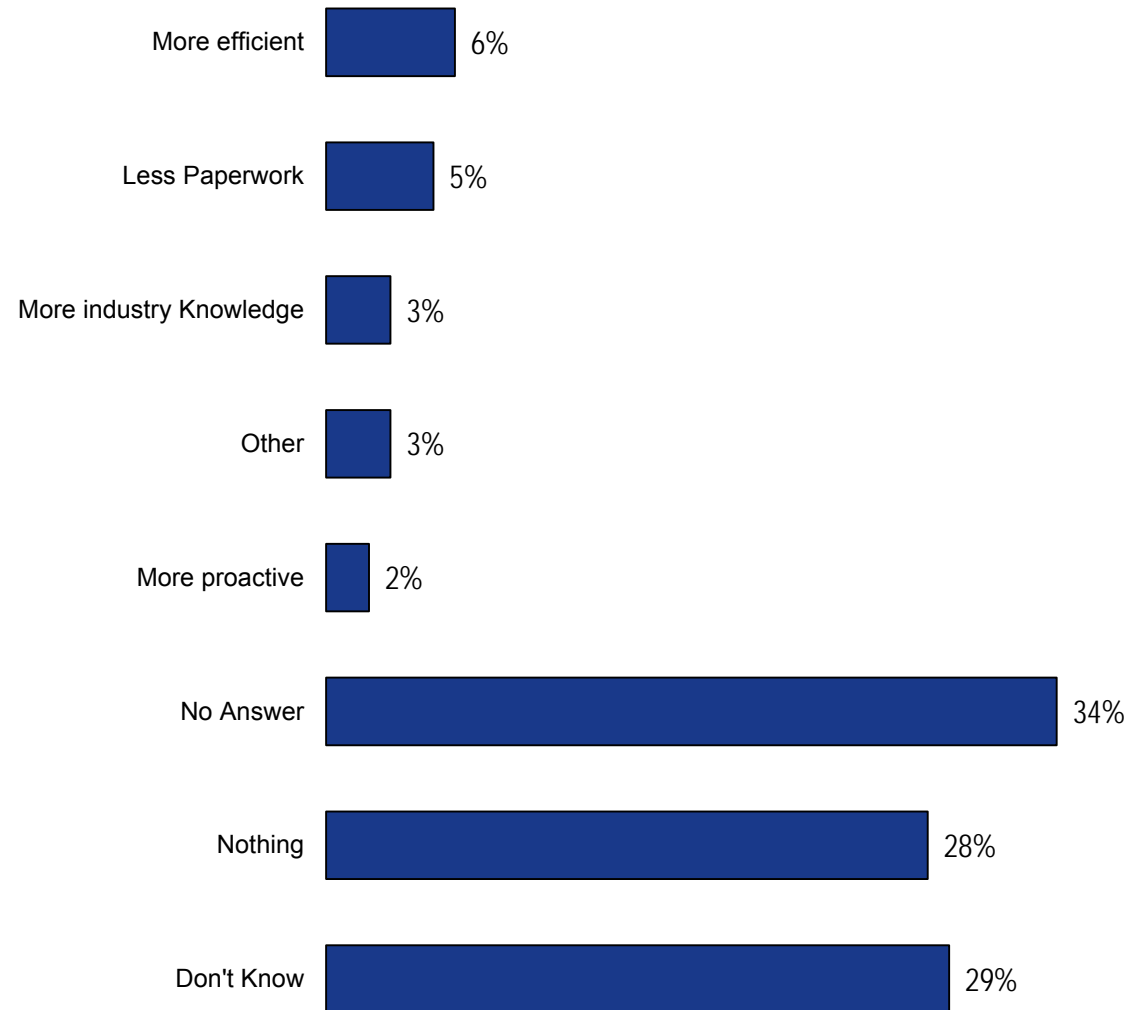
‘Anything organisation could do to improve the overall service they provide’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could do to improve the overall service they provide? [Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Key Performance Indicator – Performance

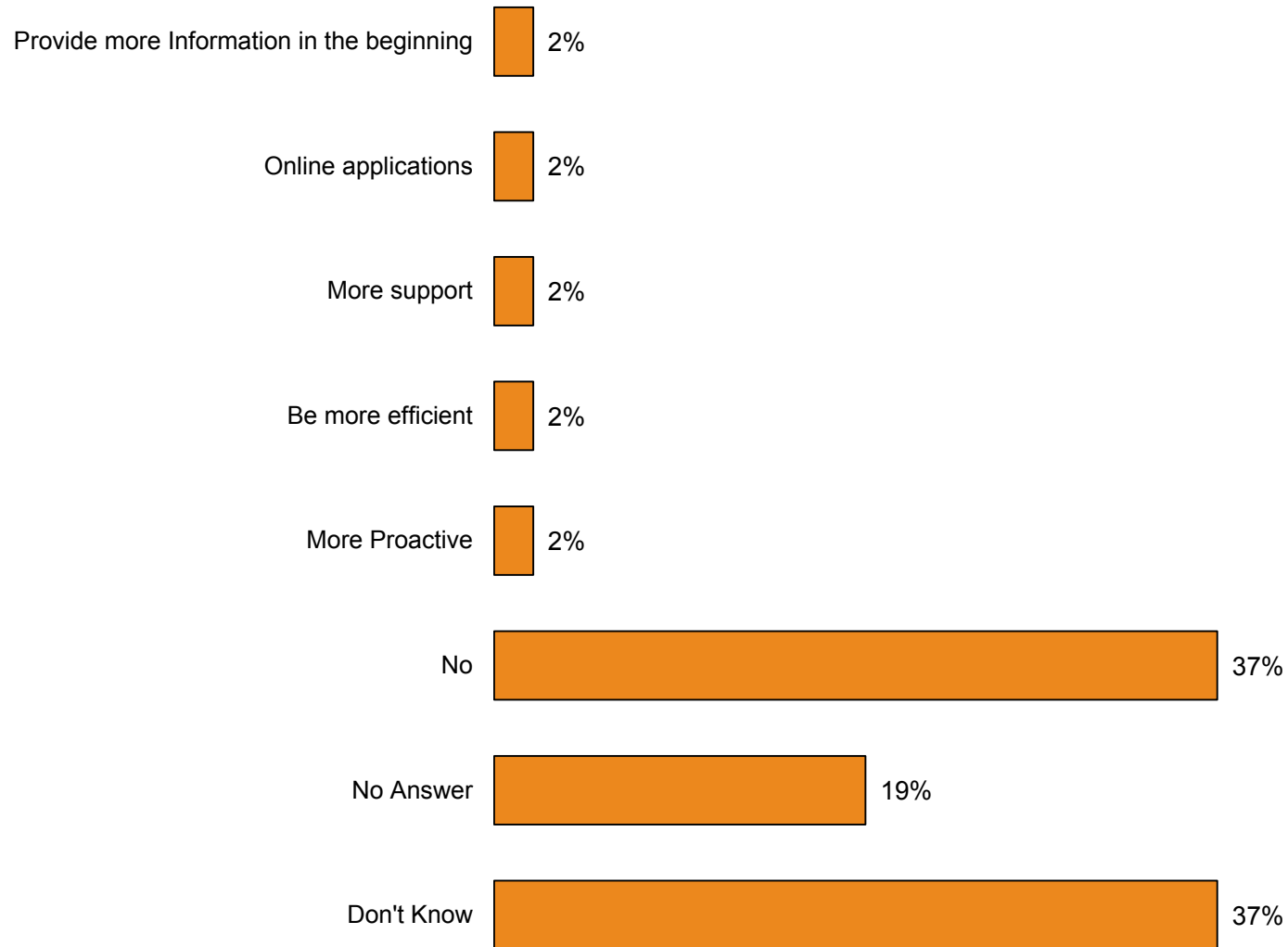
‘Anything organisation could have done better’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done better?
[Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

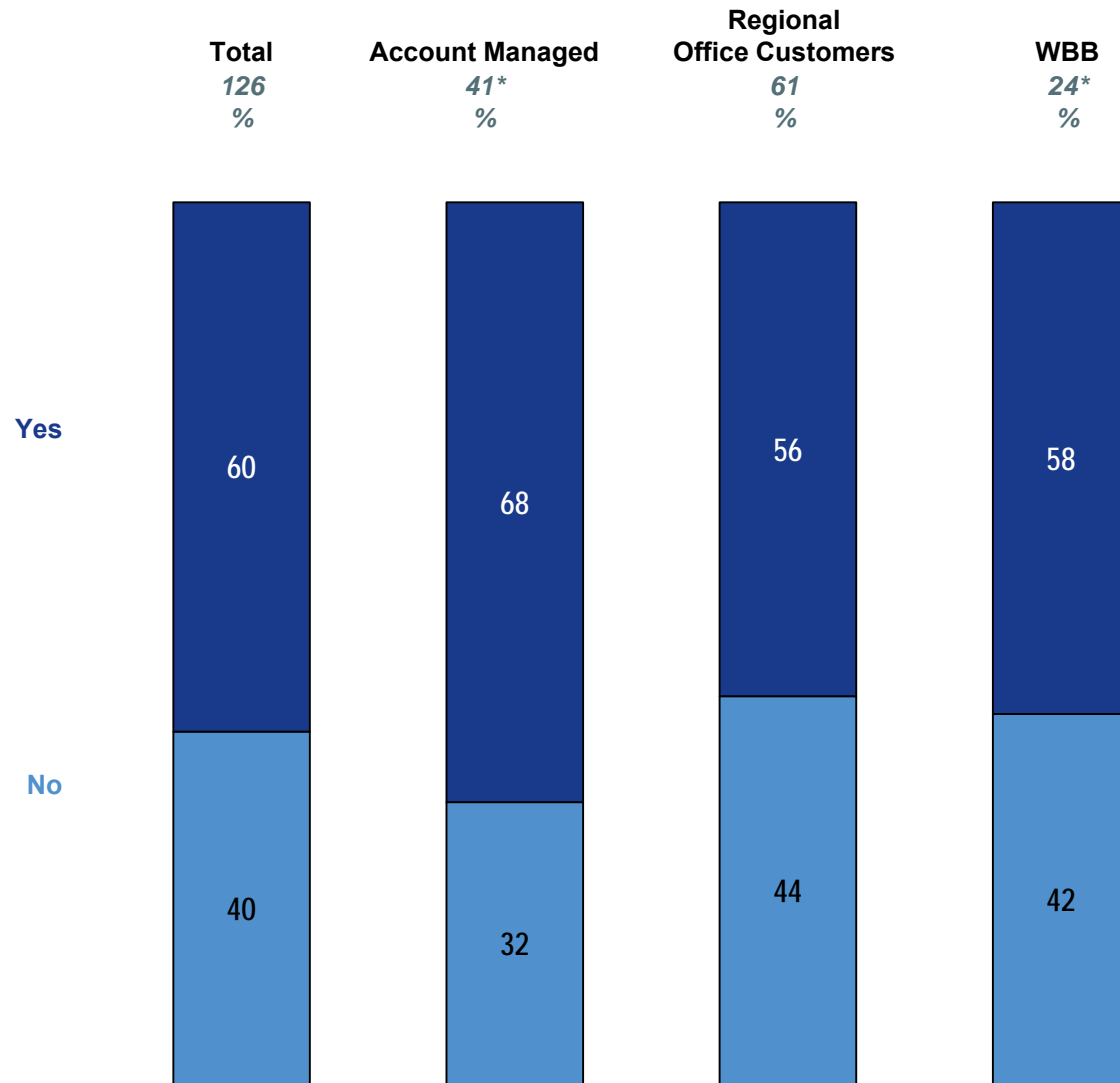
Key Performance Indicator – Performance

‘Anything organisation could have done differently’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done differently?
[Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

Actively Discussing Application for Additional Support



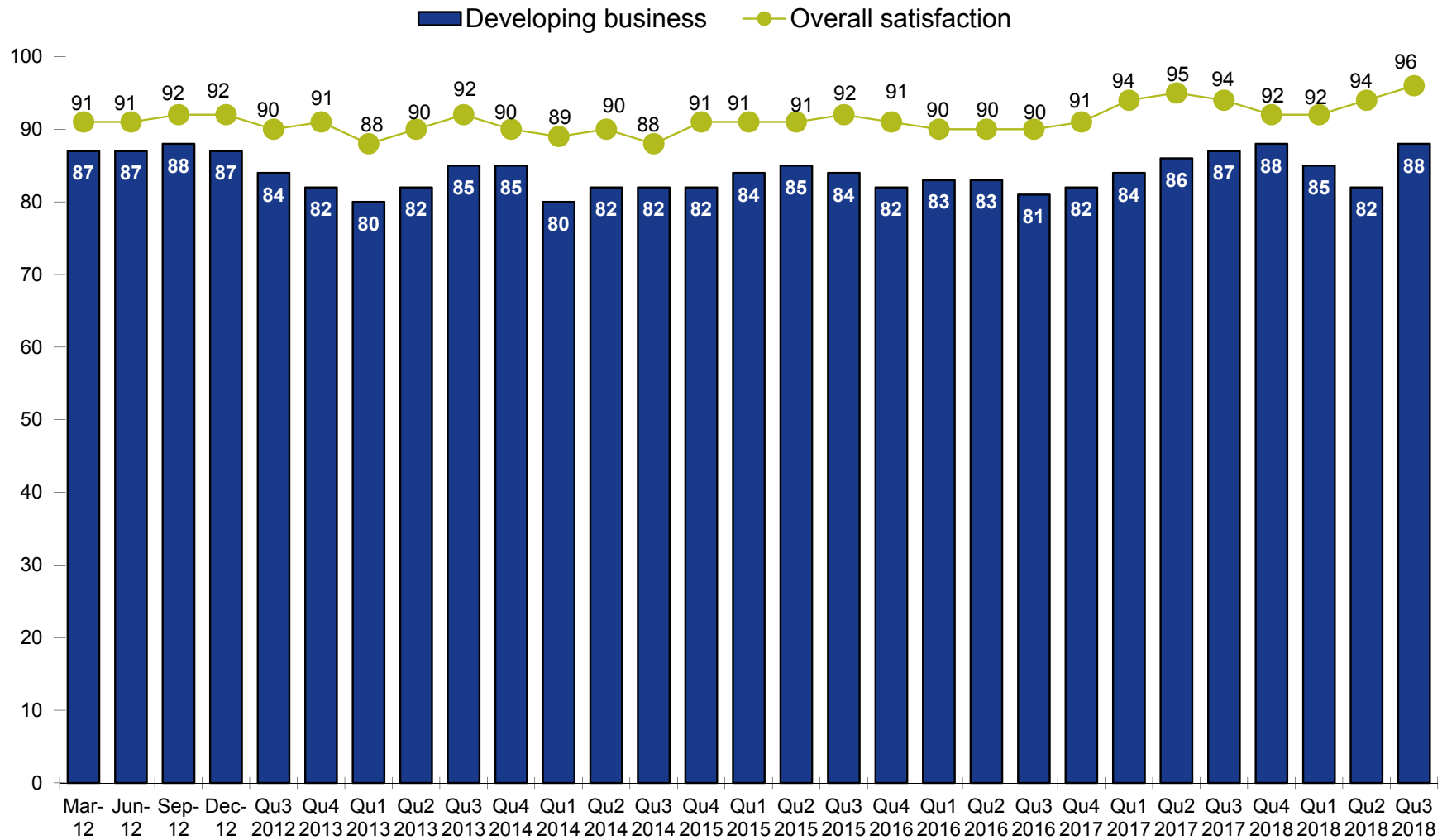
Are you actively discussing an application for additional support services at present?
[Base: 126 Oct'18-Dec'18 (41* Account Managed, 61 Regional Office Customers and 24* WBB)]

ROLLING AVERAGES



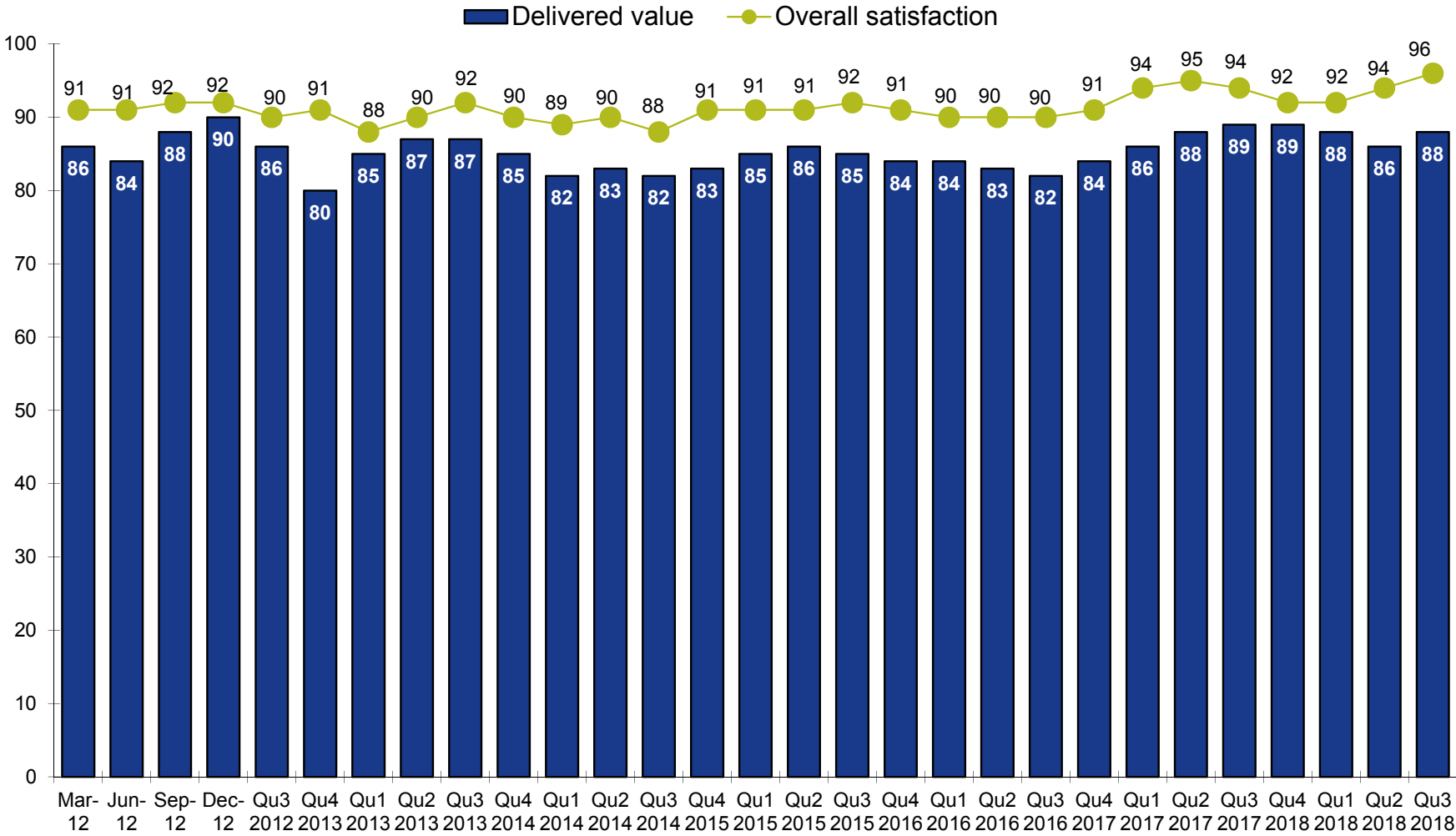
Satisfaction and key driver variables: INI is helping to develop my business

Six month rolling average

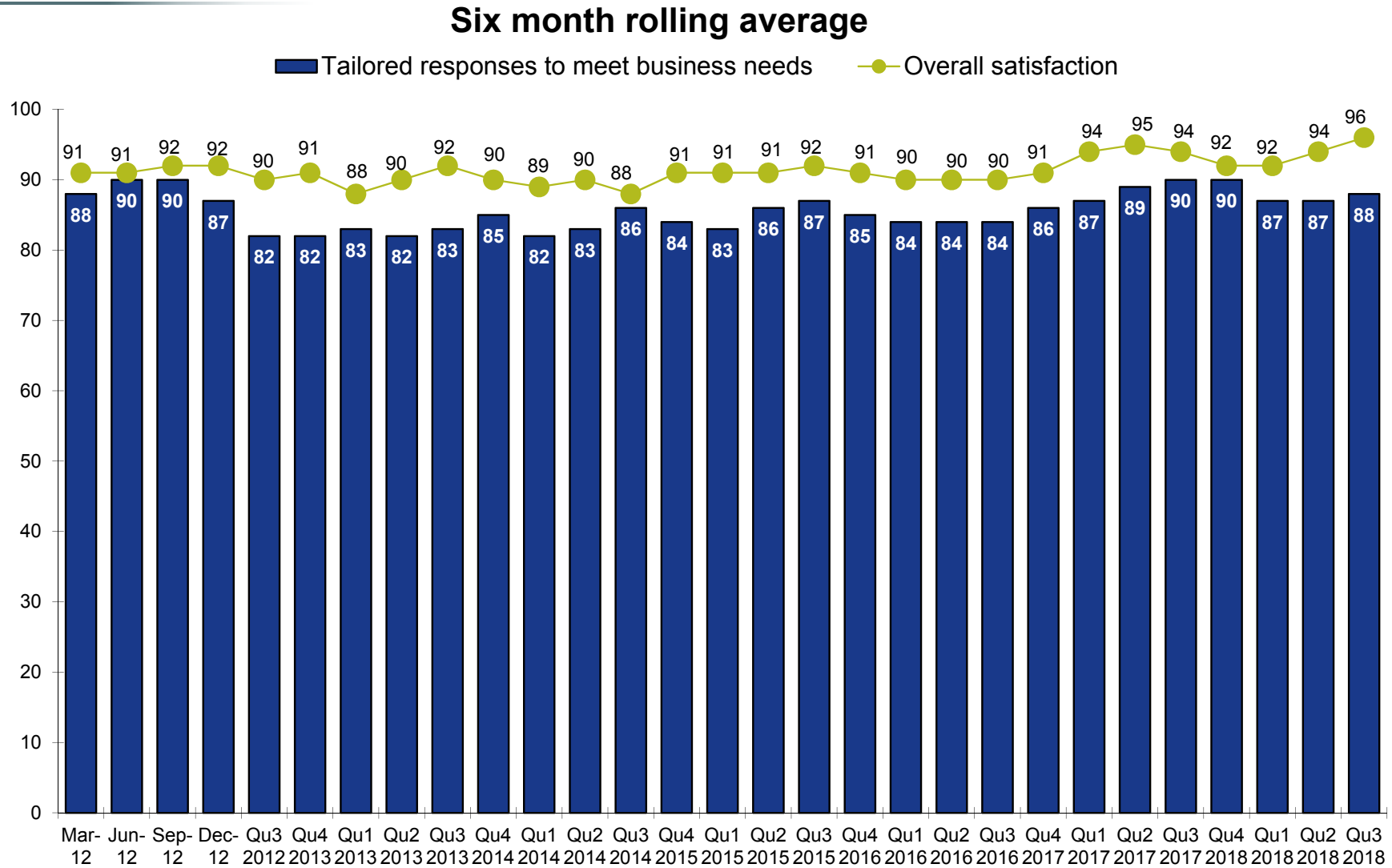


Satisfaction and key driver variables: INI delivered value to my business

Six month rolling average



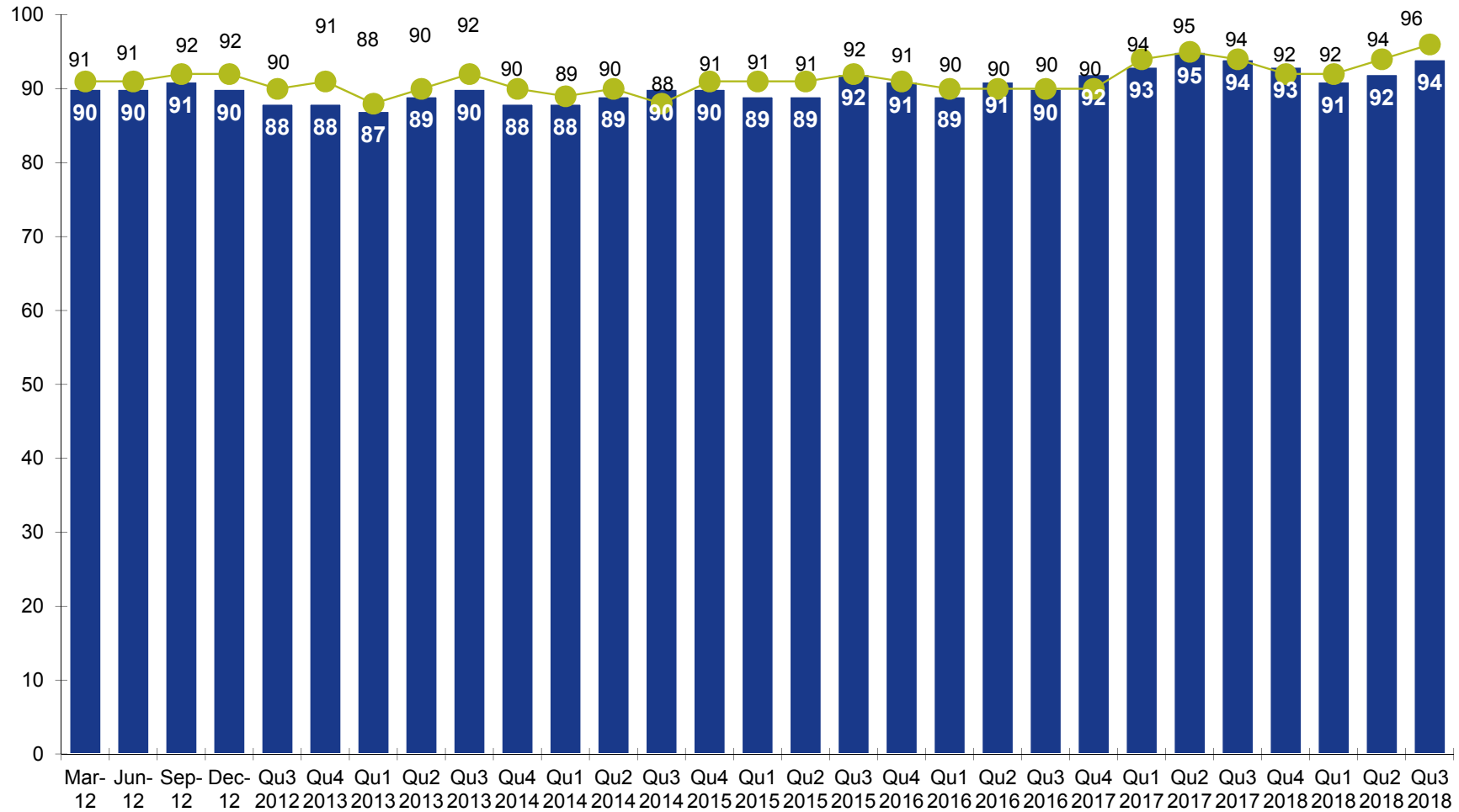
Satisfaction and key driver variables: INI tailored their responses to meet your business needs



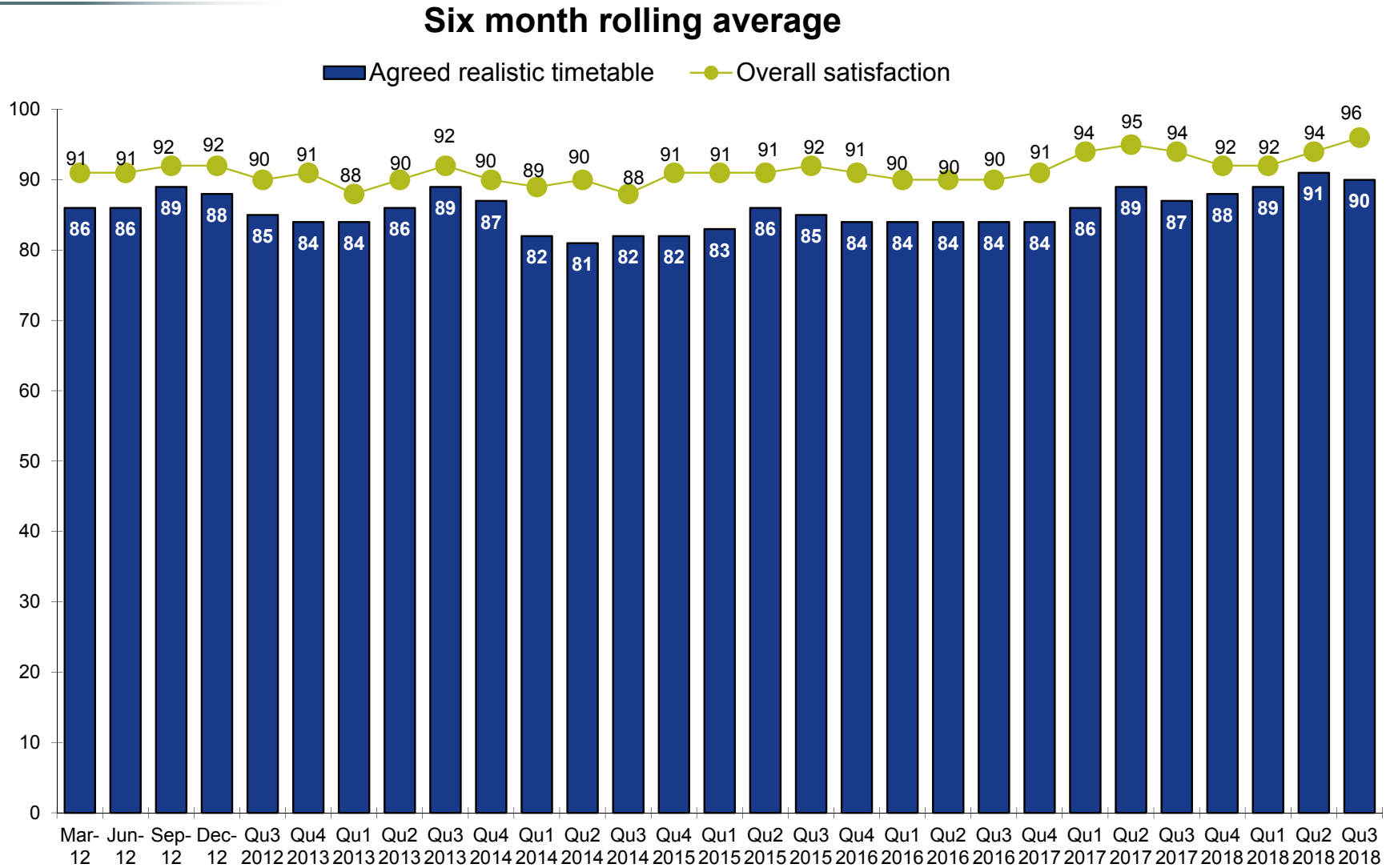
Satisfaction and key driver variables: Satisfaction with Client Executive

Six month rolling average

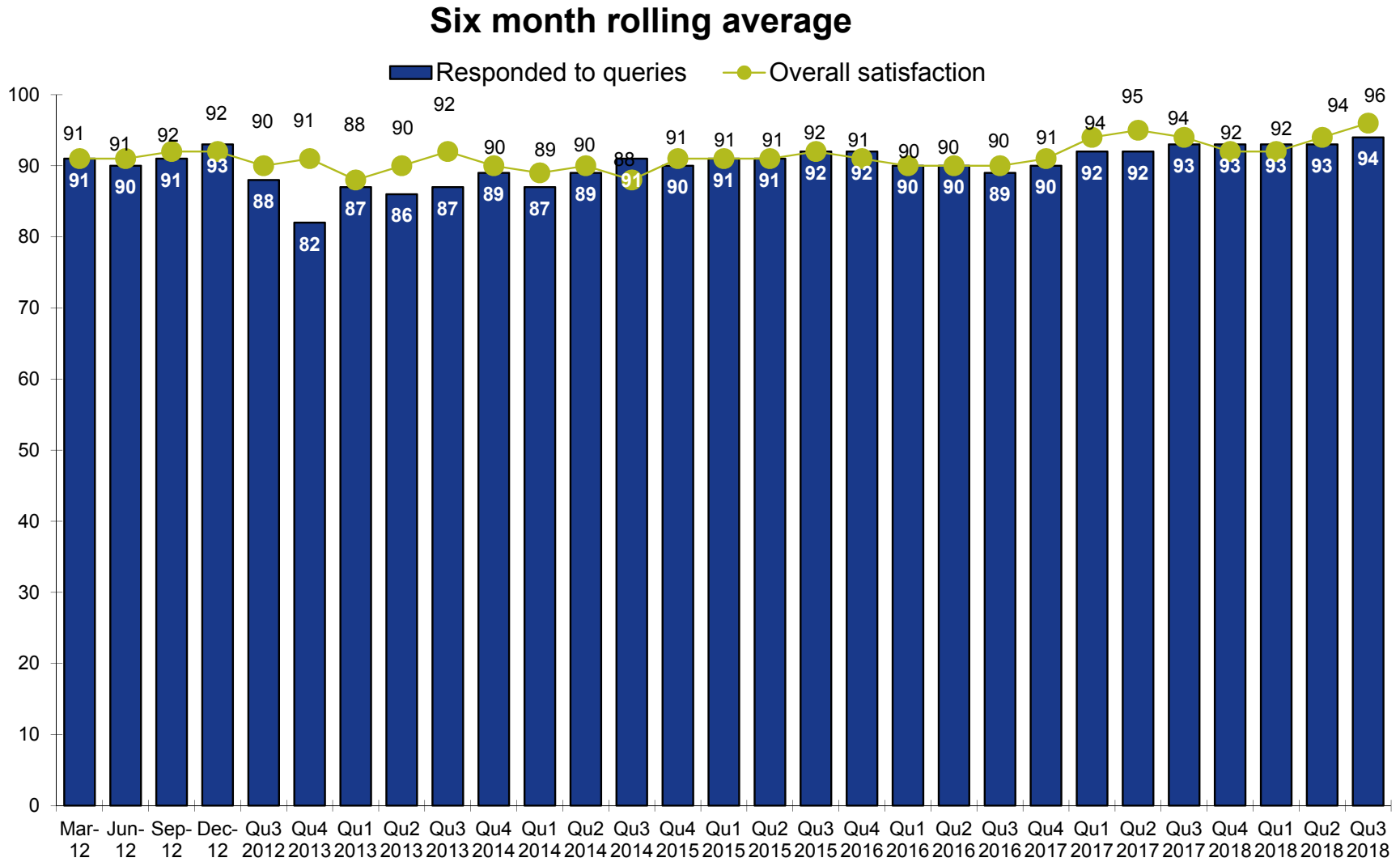
■ Satisfaction with Customer Executive ● Overall satisfaction



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

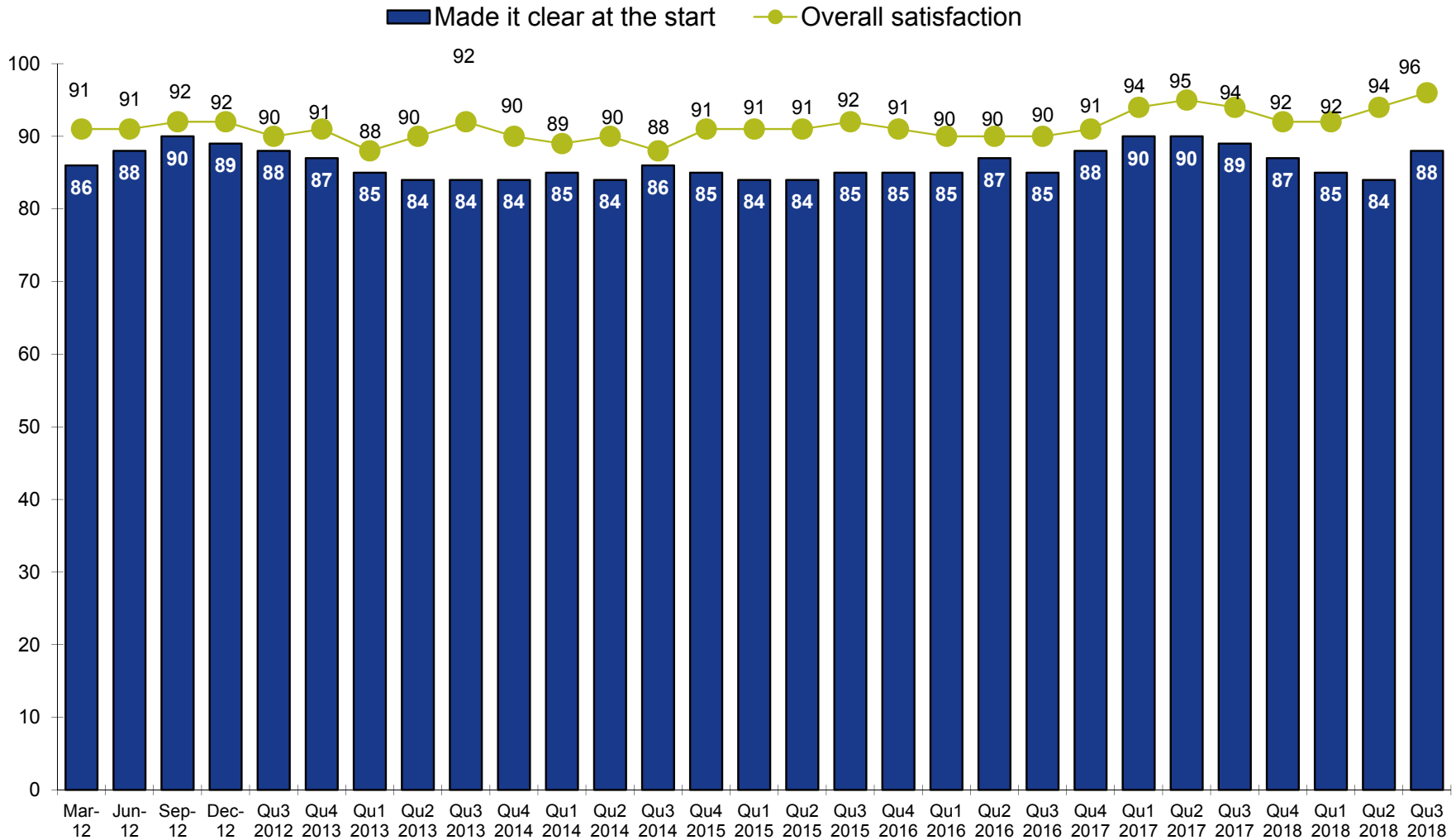


Satisfaction and key driver variables: INI responded to your queries within a reasonable timeframe



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

Six month rolling average



DETAILED PERFORMANCE MEASURES



Performance Overall

| Average Rating | |
|----------------|------|
| Nov-Mar '17 | 4.46 |
| Apr-Jun'17 | 4.45 |
| Jul-Sep'17 | 4.47 |
| Oct-Dec'17 | 4.48 |
| Jan-Mar-'18 | 4.47 |
| Apr-Jun'-18 | 4.47 |
| Jul-Sept'18 | 4.45 |
| Oct-Dec'18 | 4.44 |

Customers



Process - Management



Process - Communication



■ Oct-Dec

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: 126 Oct'18-Sept'18]

Performance by Segment: Account Managed Customers

Base = 41*

| Average Rating | |
|----------------|------|
| Nov-Mar '17 | 4.51 |
| Apr-Jun'17 | 4.60 |
| Jul-Sep'17 | 4.53 |
| Oct-Dec'17 | 4.53 |
| Jan-Mar'18 | 4.48 |
| Apr-Jun'18 | 4.37 |
| Jul-Sept'18 | 4.51 |
| Oct-Dec'18 | 4.49 |

Customers



Process - Management



Process - Communication



■ Oct-Dec

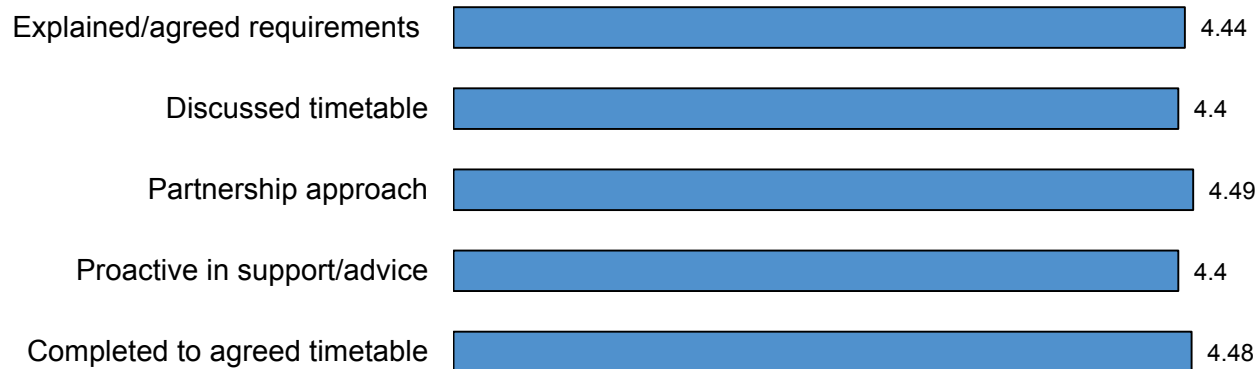
Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 41 Oct'18-Dec'18] *Small Bases = less than 50

Performance by Segment: Regional Office Customers

Base = 61



Process - Management



Process - Communication



| Average Rating | |
|----------------|------|
| Nov-Mar '17 | 4.41 |
| Apr-Jun'17 | 4.42 |
| Jul-Sep'17 | 4.49 |
| Oct-Dec'17 | 4.36 |
| Jan-Mar'18 | 4.48 |
| Apr-Jun'18 | 4.60 |
| Jul-Sept'18 | 4.4 |
| Oct-Dec'18 | 4.45 |

■ Oct-Dec

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: 61 Oct'18-Dec'18]

Performance by Segment: Wider Business Base

Base = 24*

| Average Rating | |
|----------------|------|
| Nov-Mar '17 | 4.48 |
| Apr-Jun'17 | 4.18 |
| Jul-Sep'17 | 4.26 |
| Oct-Dec'17 | 4.50 |
| Jan-Mar'18 | 4.23 |
| Apr-Jun'18 | 4.29 |
| Jul-Sept'18 | 4.51 |
| Oct-Dec'18 | 4.29 |

Customers



Process - Management



Process - Communication



■ Oct-Dec

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: 24* Oct'18-Dec'18] *Small Bases = less than 50