



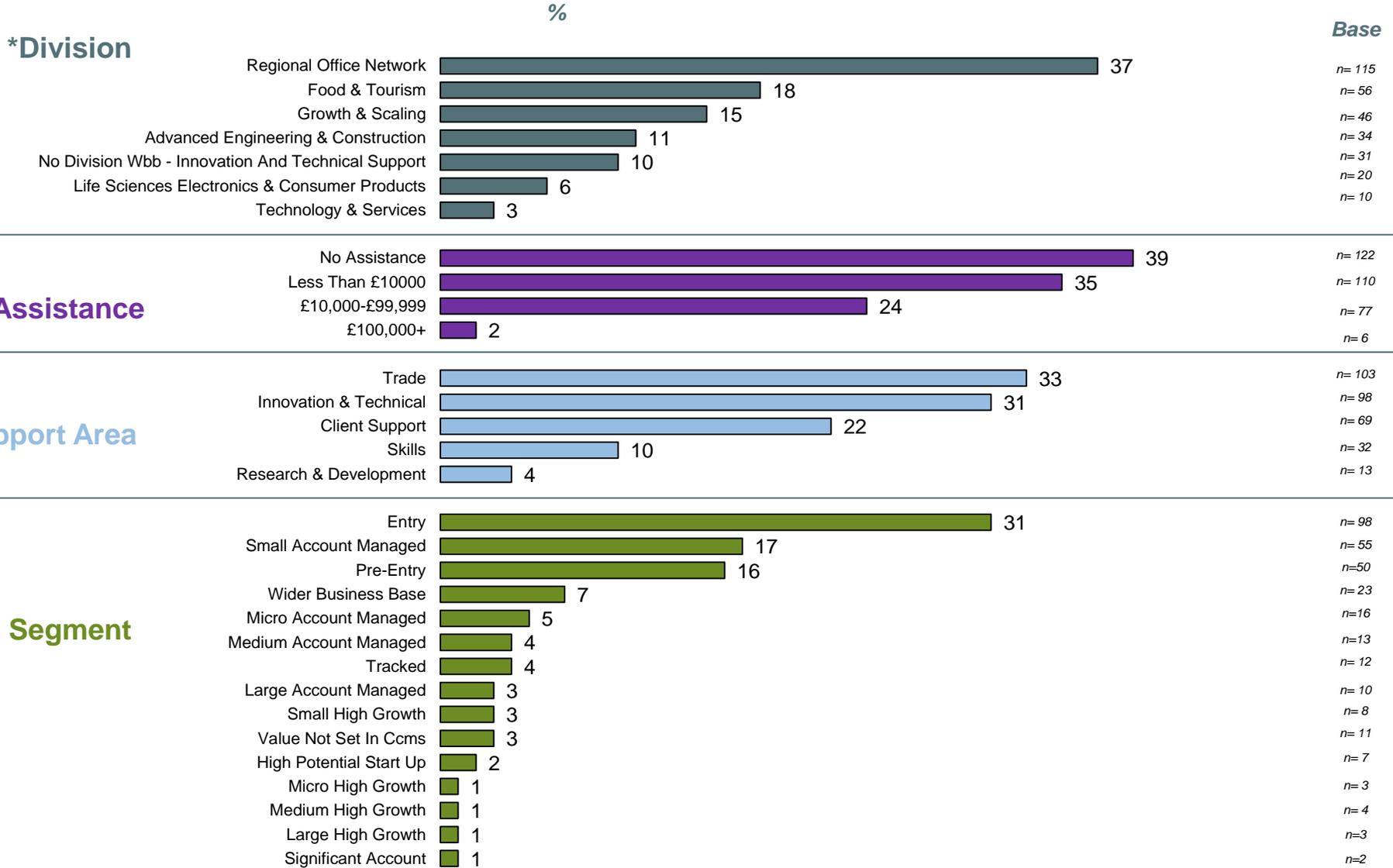
Methodology

- 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 315 interviews were completed, 159 of these were Account Managed Customers and 109 were Regional Office Customers, all who accepted a letter of offer or support between July and October 2016. A sample of 47 were the Wider Business Base who had some form of interaction with Invest NI between July and October 2016. Of the 315 participating customers and WBB, 268 Customers and 44 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 2016, 315 interviews were conducted so when analysing results by level of financial assistance base sizes can drop as low as 6 (those receiving £100,000+).

Analysis of Sample



*1 company from High Potential Start Up / 1 company from Research & Development

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 Q2 2016, satisfaction with overall service received remained consistently high across the total sample with almost 9 in 10 (89%) claiming to be satisfied. Within this, over 6 in 10 (63%) were 'very satisfied' with Invest NI overall. These satisfaction results remained in line with Q1 (90%) findings.
- Overall satisfaction levels were high among Account Managed Customers with over 9 in 10 (91%) customers expressing satisfaction with the service provided. However the proportion of Account Managed Customers who expressed they were 'very satisfied' experienced a decline on Q1 (59% from 71%).
- Overall levels of satisfaction among Regional Office Customers (86%) remained consistent with Q1 (87%) however still down on Q4 (94%). Encouragingly, around 7 in 10 (69%) claimed to be 'very satisfied' (up from 61%).
- Satisfaction levels among WBB Customers continued on an upward trend (89% from 88% in Q1 and 86% in Q4), with two thirds (66%) expressing strong satisfaction.
- Levels of satisfaction were high across the support areas, with both areas receiving the same mean satisfaction score of 4.5. However, the mean satisfaction score amongst those in receipt of Grant Support was down on Q1 (4.5 from 4.66)

Executive Summary (2) – Customers

Key Performance Indicators

- In Q2 2016, advocacy levels remain consistently high with almost 9 in 10 (88%) customers stating they would speak highly of Invest NI (87% in Q1).
- Advocacy levels were highest among Account Managed Customers (91%) remaining fairly consistent with Q1 (92%). Advocacy among Regional Office customers was also high (83%) and moving back in the right direction to Q4 levels (Q1 82%, Q4 89%).
- Advocacy among WBB, although remaining high, experienced a decline since Q1 (83% from 86%).
- Levels of advocacy were slightly higher among those in receipt of grant support than those receiving programme support (4.38 vs. 4.36).
- Invest NI achieved a Net Promoter Score of +57 down by 5 points on Q1 (+62). There has been a continual decline in the Net Promoter Score among Regional Office Customers from +68 in Q4 to +58 in Q1 and to +50 in Q2. The Net promoter score amongst Account Managed Customers also experienced a decline from +69 in Q1 to +60 in Q2. The Net Promoter Score is highest amongst WBB (+62) and consistent with Q1 (+61).

Executive Summary (3) – Customers

- More than 4 in 5 (82%) customers agreed that Invest NI was helping to develop their business, consistent with Q1 (84%). Agreement is highest among Account Managed Customers (85%) although slightly down on Q1 levels (89%). Agreement levels among Regional Office Customers experienced a downward trend on Q1 (77% from 85%). Agreement among WBB remains in line with Q1 (76%).
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was achieved among those receiving grant support (4.37) compared to programme support (4.24).
- Over 9 in 10 (94%) customers agreed that Invest NI acts with professionalism and integrity, with 7 in 10 (70%) customers strongly agreeing with this sentiment. Agreement was highest and almost universal among Account Managed Customers (97%). Over 9 in 10 Regional Office Customers (92%) agreed Invest NI acts with professionalism and integrity.
- Levels of agreement were high across the support areas, with both areas receiving the same agreement score (mean of 4.62).
- Levels of agreement that Invest NI exceeded expectations were down on Q1 (67% from 70%). Agreement was highest among Account Managed customers (71%) and lowest among Regional Office customers (62%).

Executive Summary (4) – Customers

- More than four fifths (82%) of customers agreed that Invest NI delivered value to their business, slightly lower than the Q1 levels (84%). Agreement was highest among Account Managed customers (88%) with 6 in 10 strongly agreeing with the statement (60%). Agreement among Regional Office customers was lower at 77%. WBB had the lowest overall agreement (72%).
- Over 7 in 10 (73%) customers agreed they received information on additional support programmes that are available from Invest NI. These levels of agreement experienced an increase on Q1 and were back in line with Q4 levels (63% in Q1 and 73% in Q4) . Agreement levels increased across all customer segments and were highest amongst Account Managed Customers (80%) and lowest amongst WBB (62%).
- Over four fifths (84%) of customers were in agreement that a realistic timescale was discussed and agreed for planned activities (84% in Q1). Agreement among Account Managed customers was slightly down on Q1 (88% from 90%) while agreement among Regional Office customers remained consistent with previous waves (85% in Q2 and 84% in Q1). Agreement was also consistent among WBB (70% in Q2 and 71% in Q1).
- More than 9 in 10 (92%) customers were in agreement that Invest NI treated them fairly. Although agreement remains high, it's slightly down on Q1 (95%). Agreement was highest among Account Managed customers (93% in Q2 and 97% in Q1). Agreement remained high among Regional Office customers (91% in Q1 and 95% in Q2) and the WBB (91% in Q2, Q1 and Q4).

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 2016, all key drivers of satisfaction achieved a mean score of no less than 4.27 out of a possible 5. The top two rated drivers for Q2 (same as Q1) were; satisfaction with the Client Executive (4.59) and responding to queries in a reasonable timeframe (4.47).

Executive Summary (6) – Customers

Detailed Performance Measures

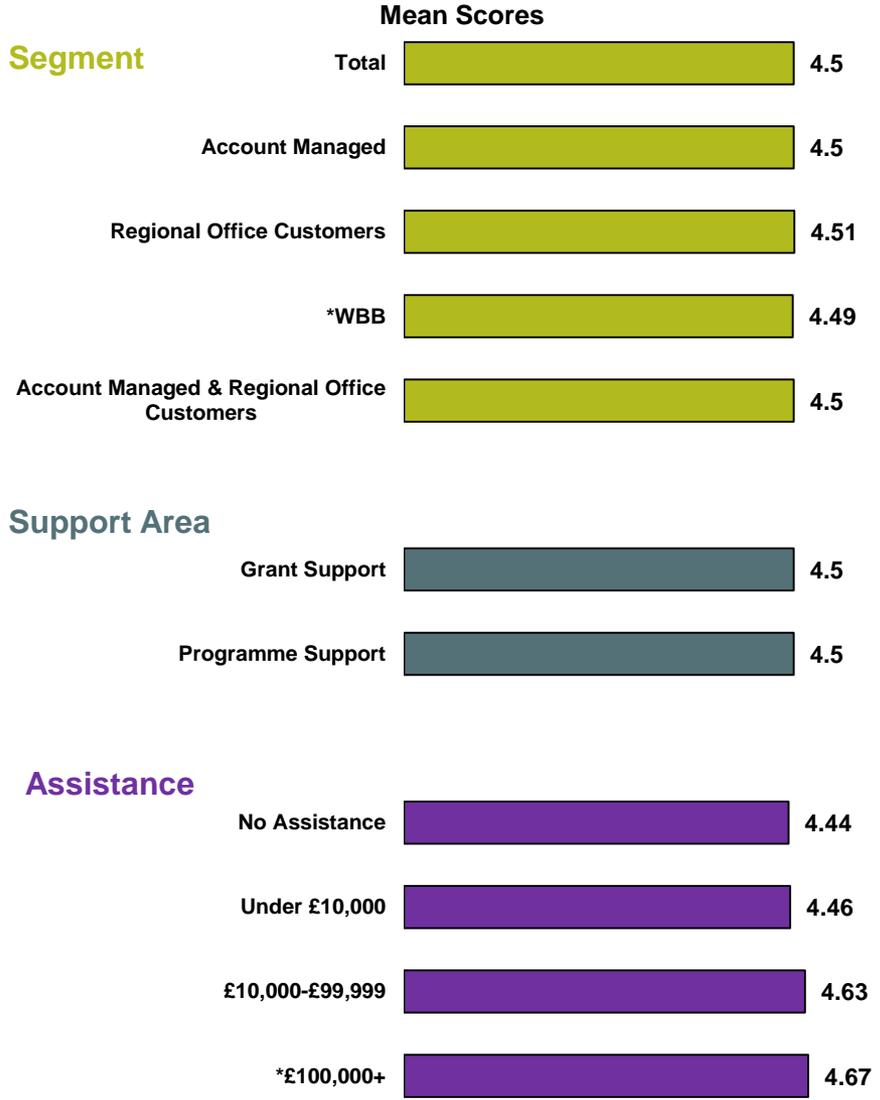
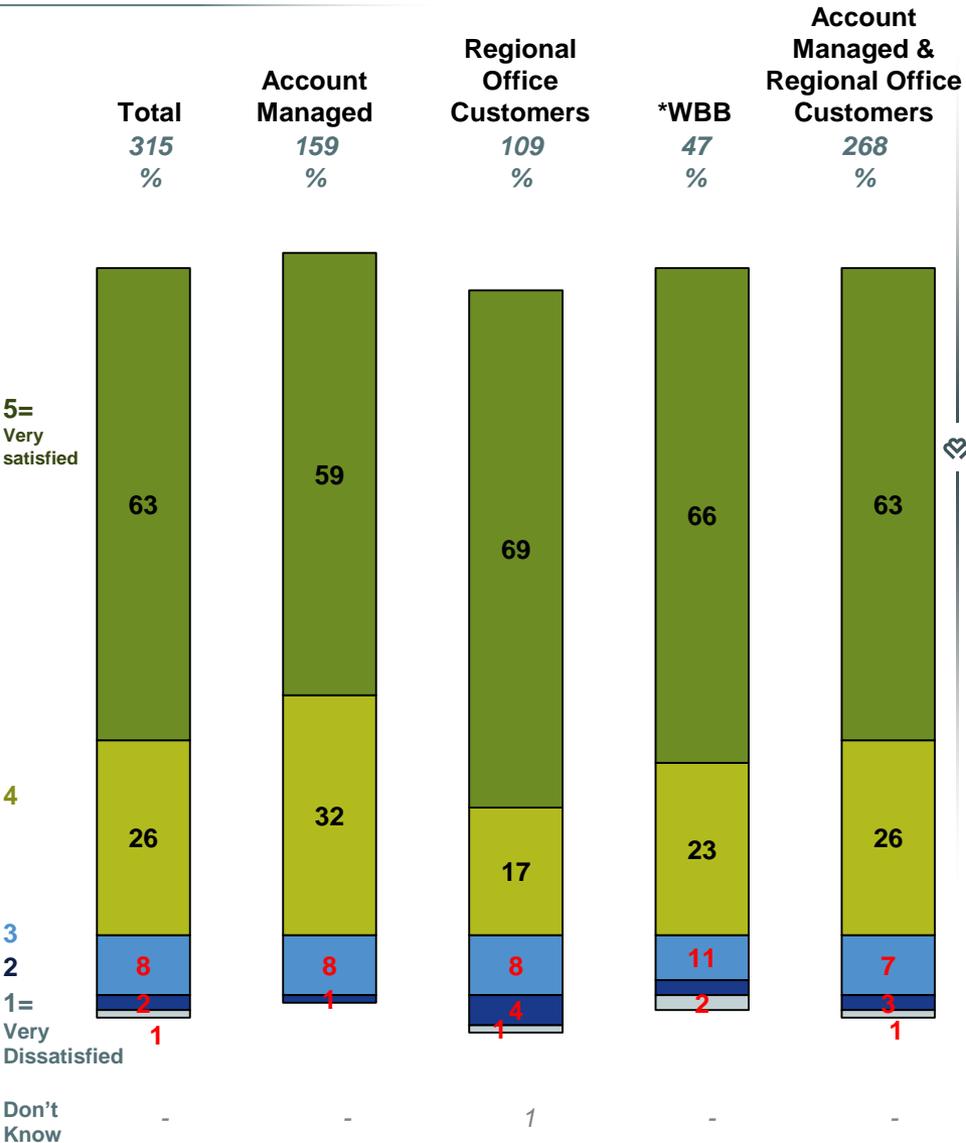
- In Q2 2016, the average mean score for overall performance was 4.33 out of a possible 5. The mean score was down on Q1 (4.33 from 4.46).
- All performance areas achieved a mean score of no less than 4.17 out of a possible 5.
- The strongest performing areas were clear communication (4.48) and responding to queries in a reasonable timeframe (4.47).
- The weaker aspects of the engagement included having a partnership approach (4.17) and proactive support / advice (4.22).
- The mean score for the overall performance by segment were as follows:
 - Account Managed customers = 4.41
 - Regional Office customers = 4.25
 - Wider Business base = 4.28

SATISFACTION



Key Performance Indicator – Satisfaction

**Small Bases = less than 50*



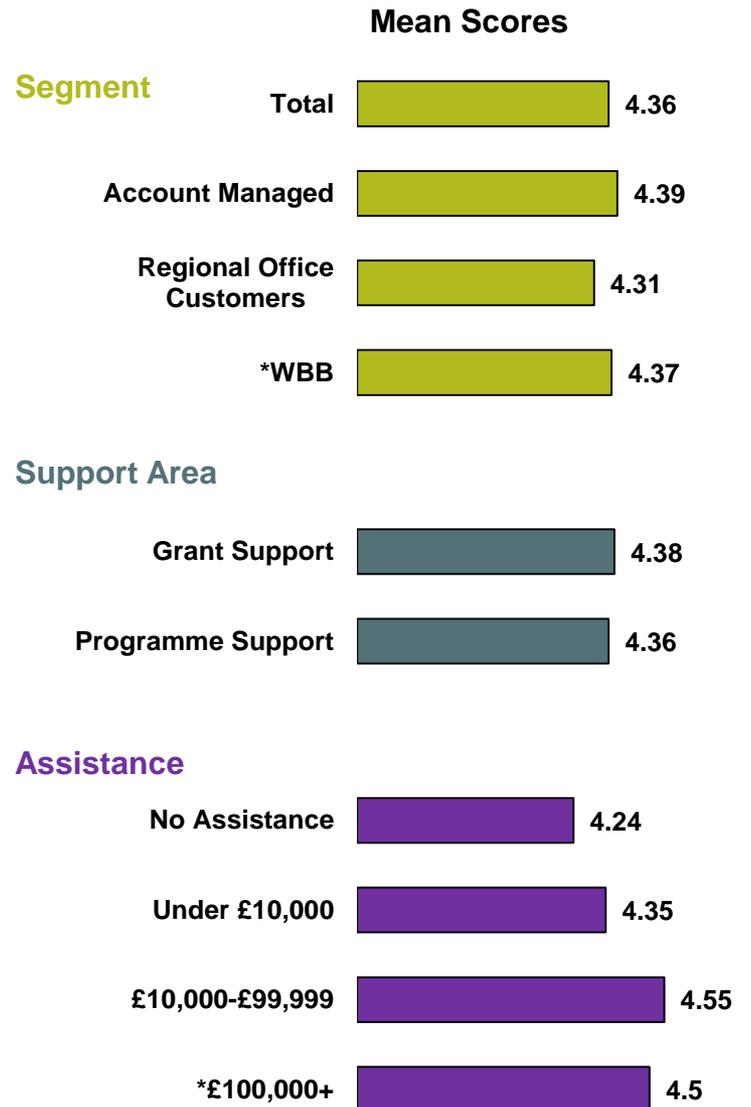
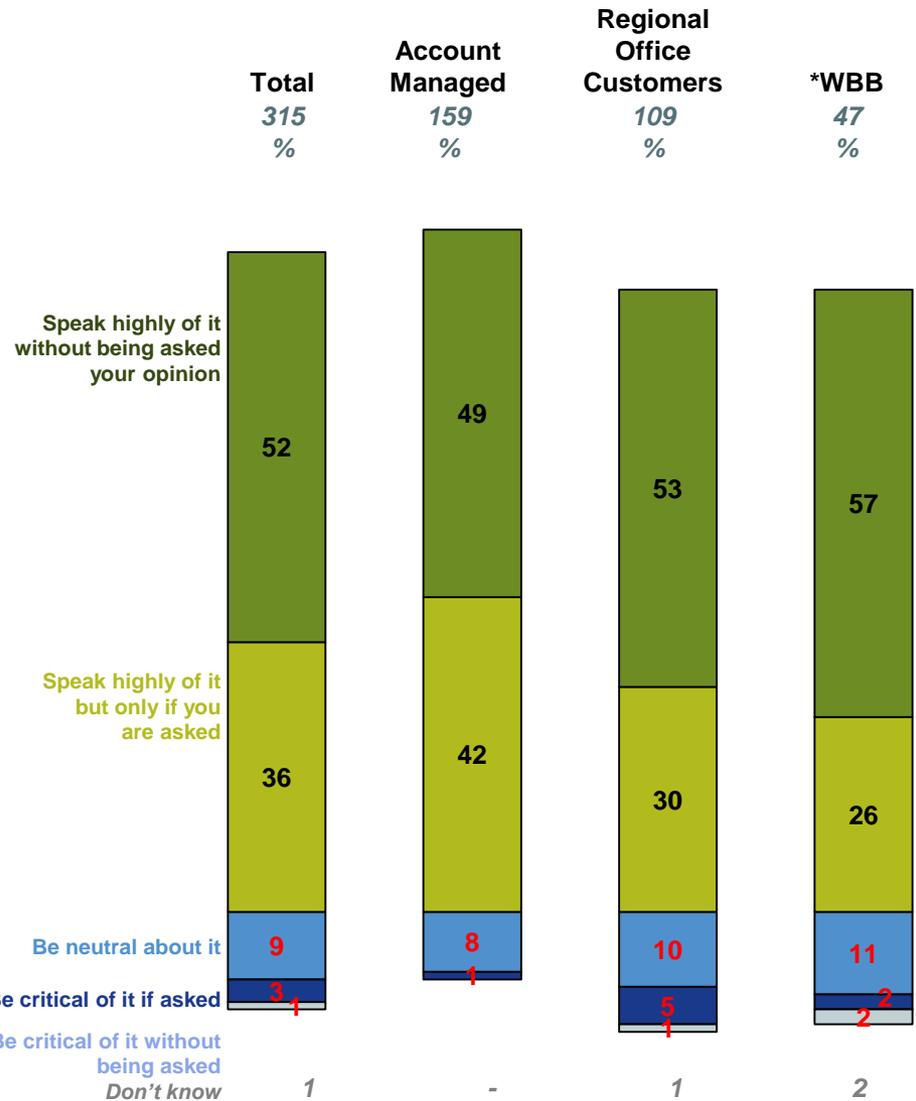
How satisfied or dissatisfied are you with Invest NI overall in relation to this project?
 [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

ADVOCACY



Key Performance Indicator – Advocacy

**Small Bases = less than 50*

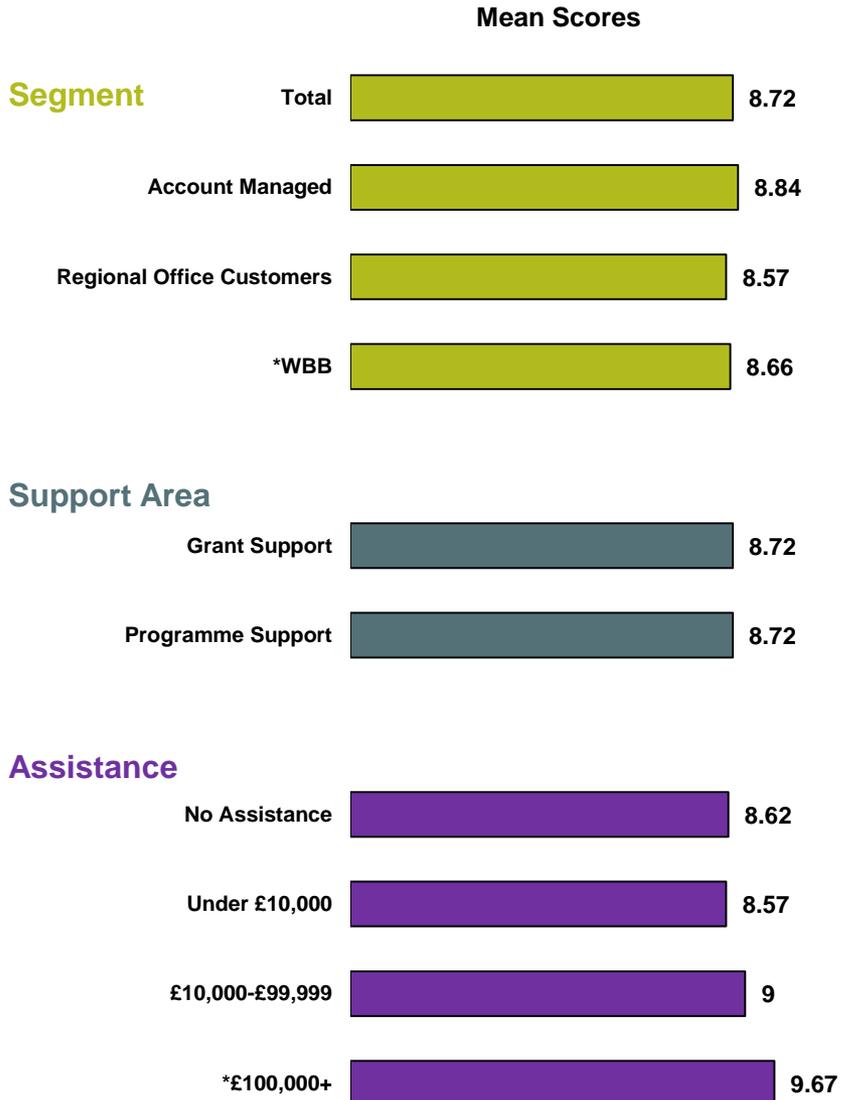
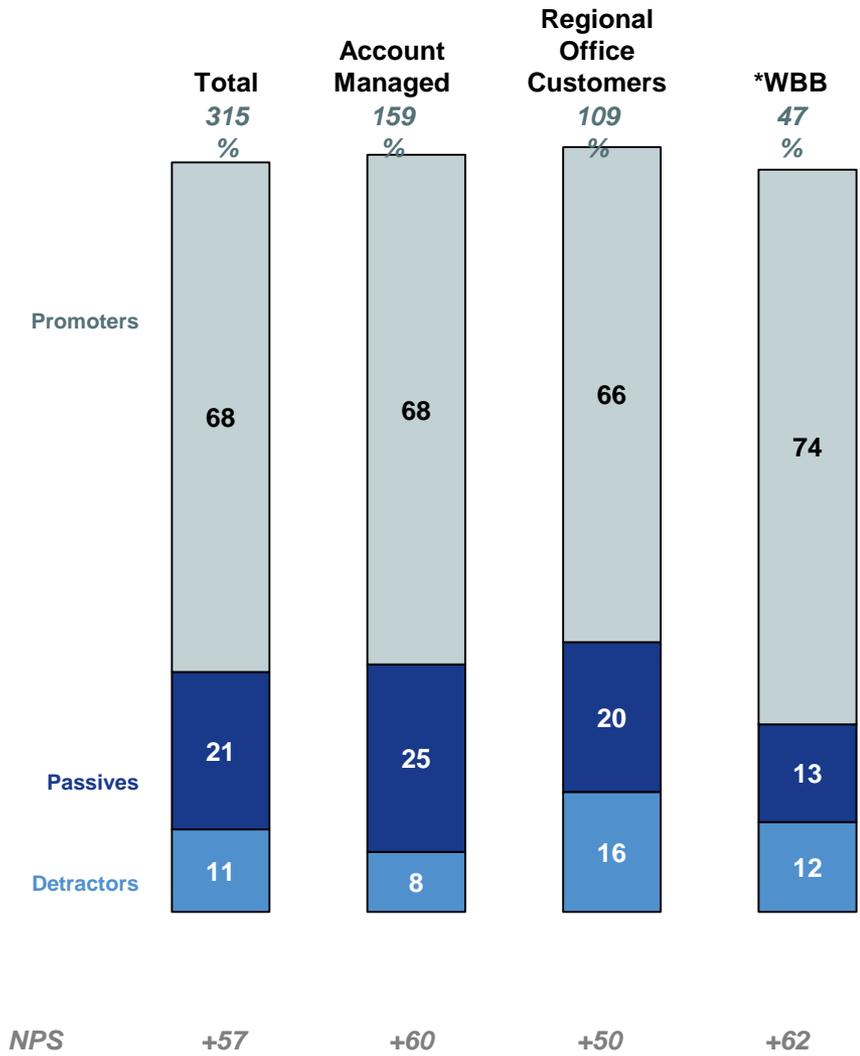


How highly would you speak about Invest NI?

[Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

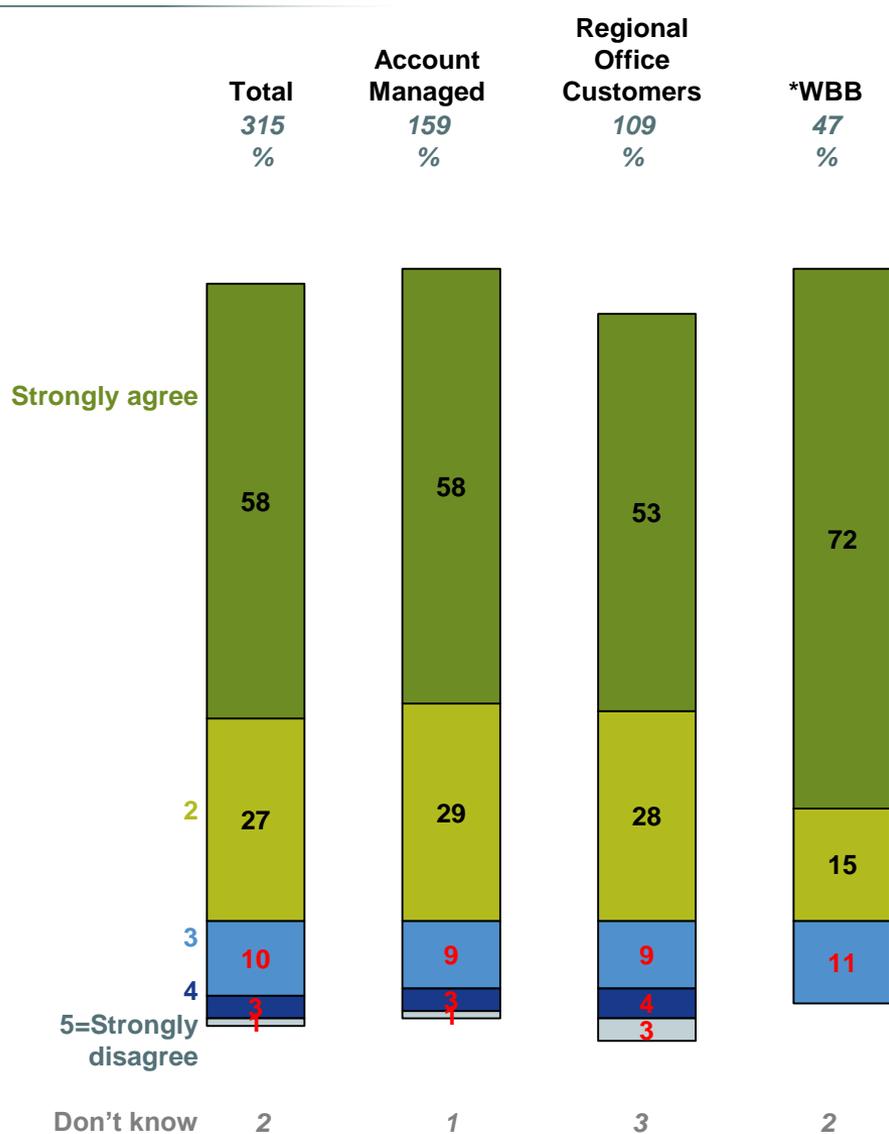
CLIENT FOCUSED



Key Performance Indicator – Client Focused

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

**Small Bases = less than 50*

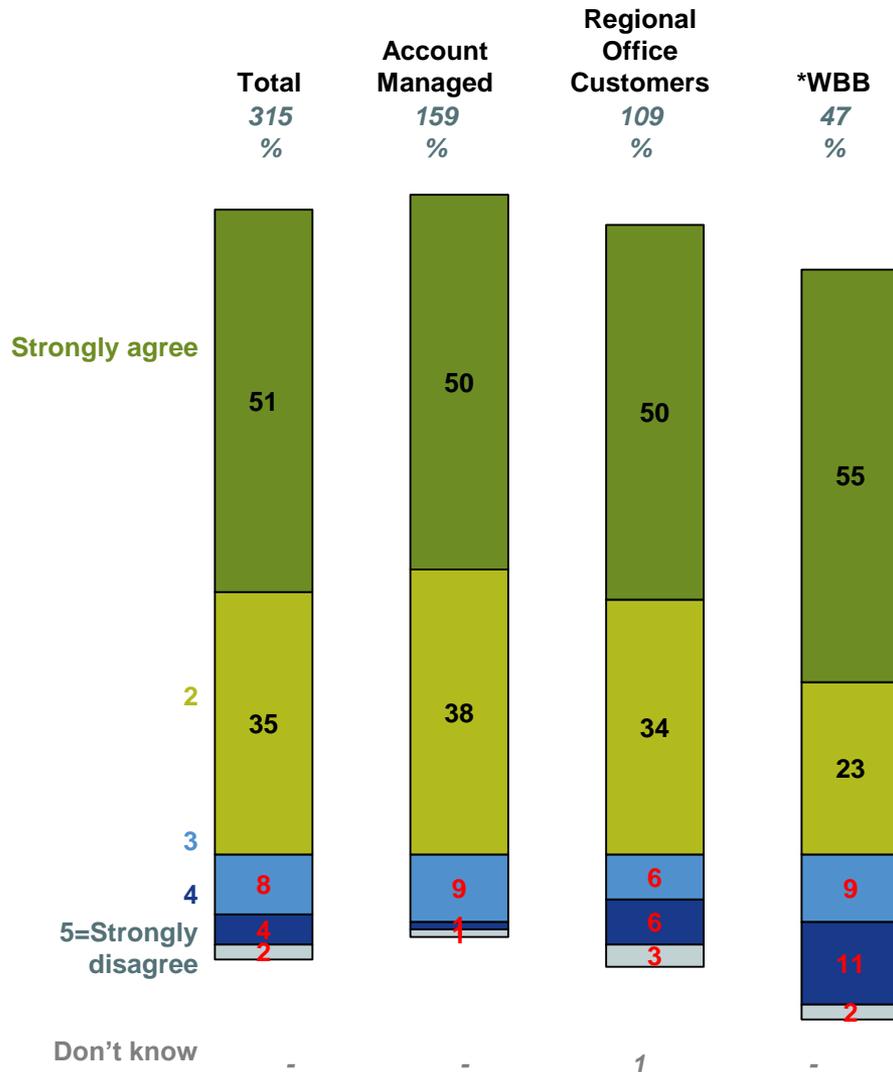


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Client Focused

'Had sufficient understanding of your business needs'

*Small Bases = less than 50

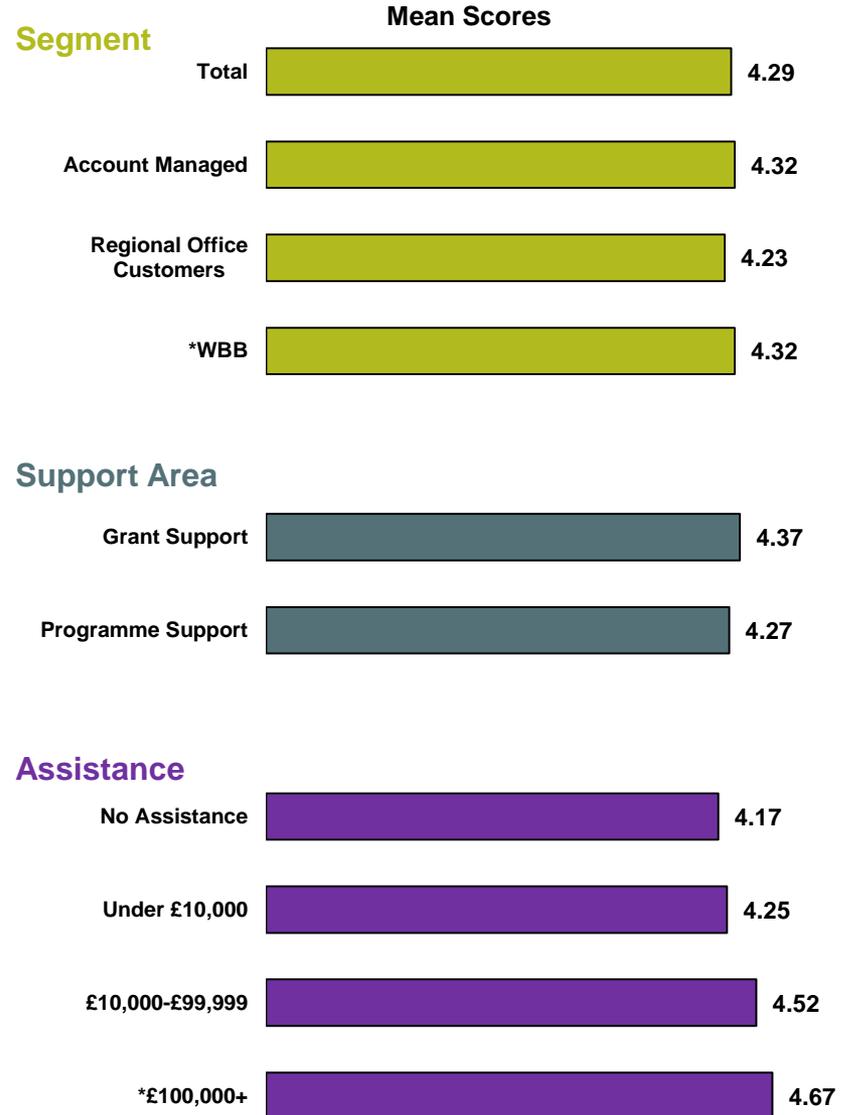
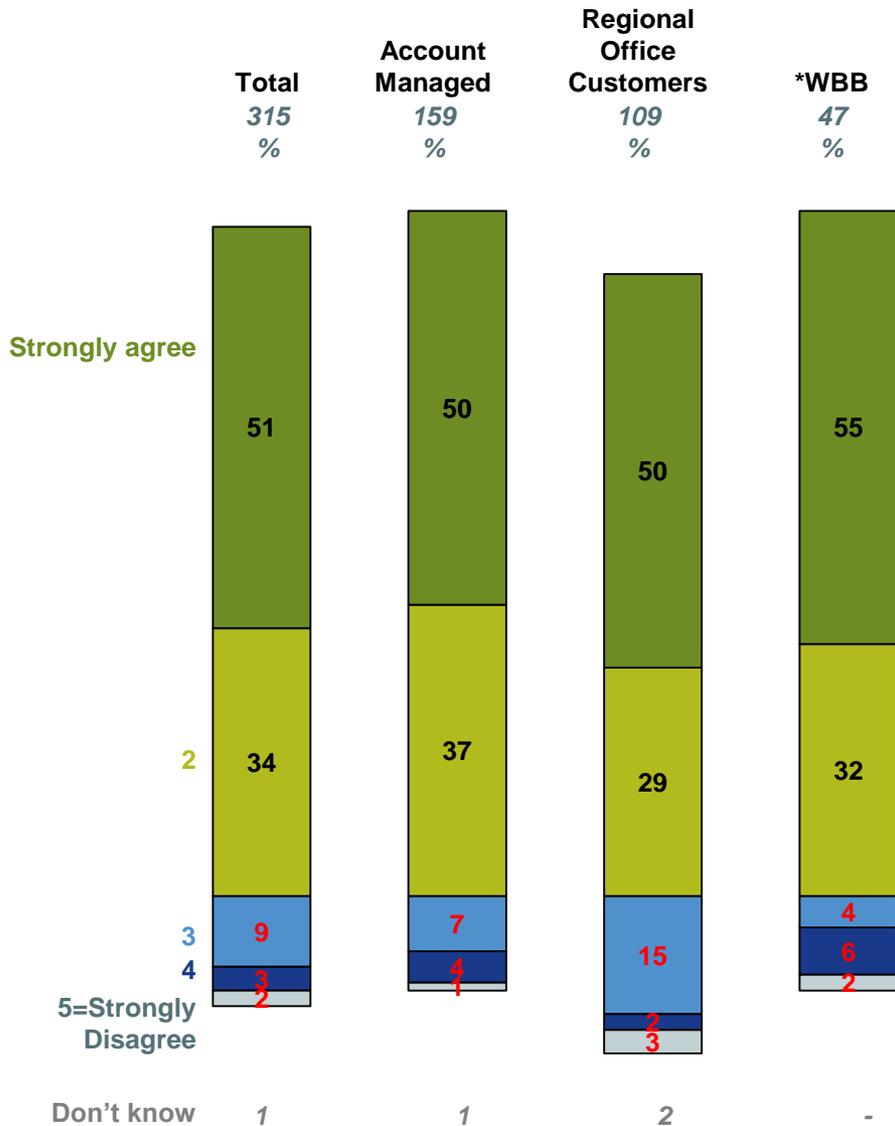


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Client Focused

'Tailored its response to meet your business needs'

*Small Bases = less than 50

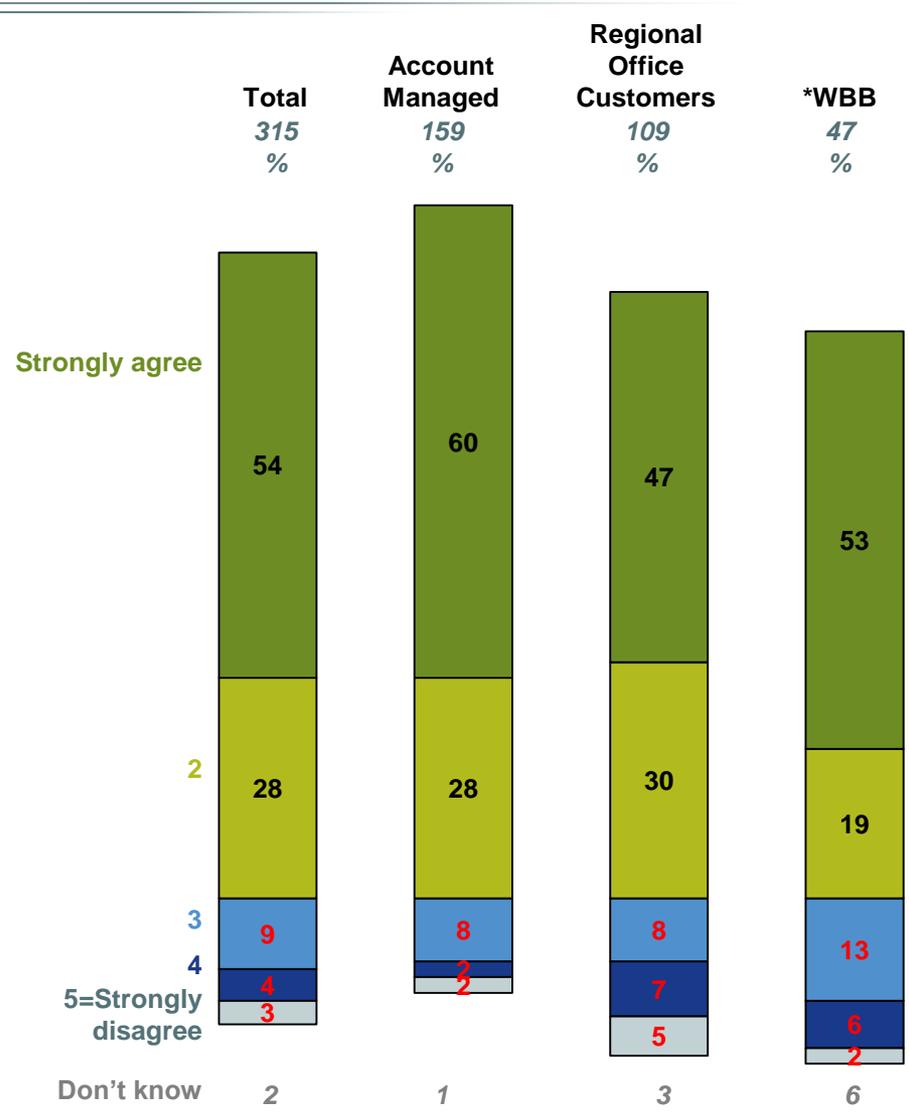


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Client Focused

'Delivered value to your business'

**Small Bases = less than 50*

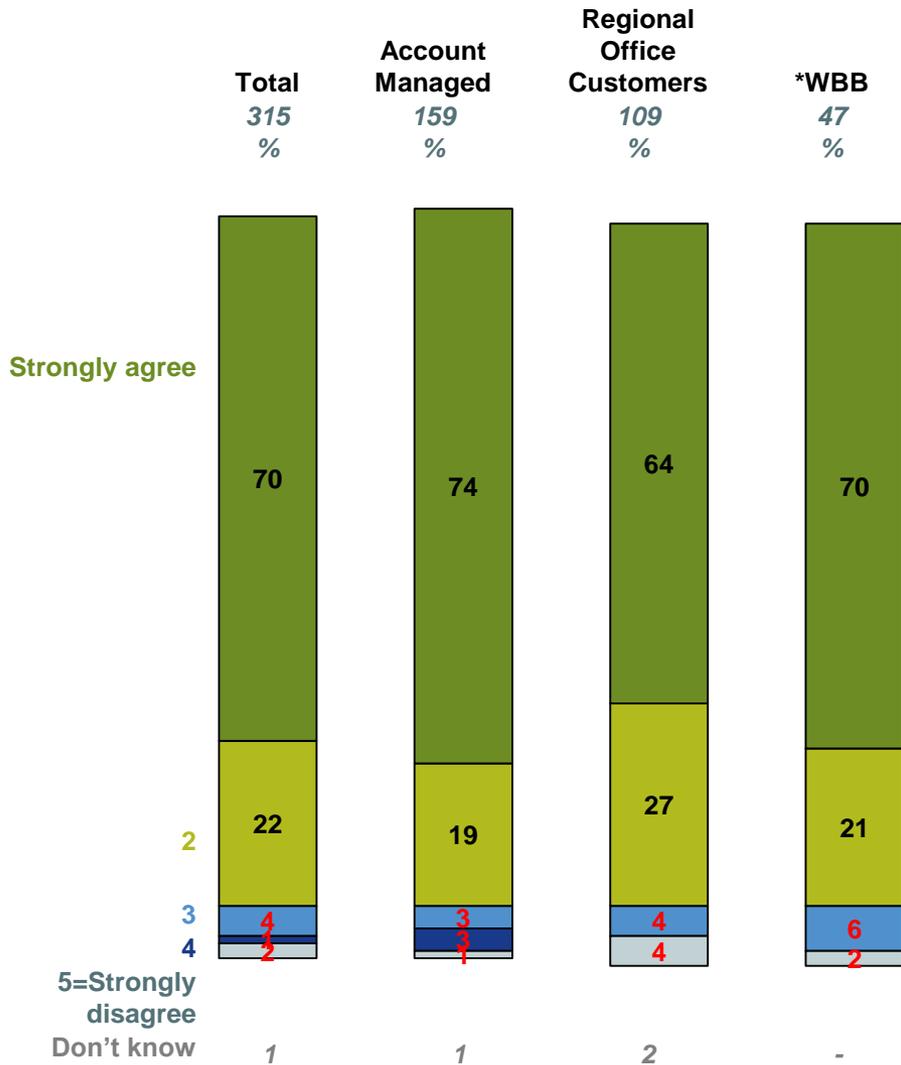


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Client Focused

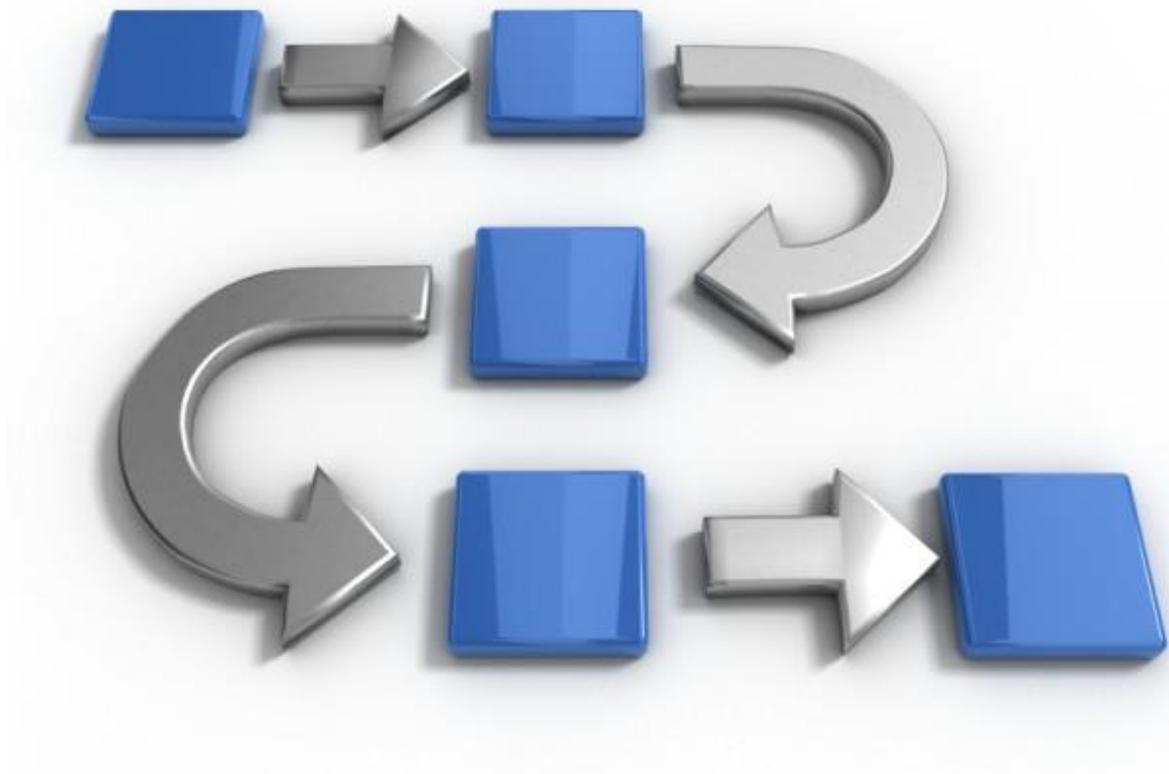
'Treated You Fairly'

**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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

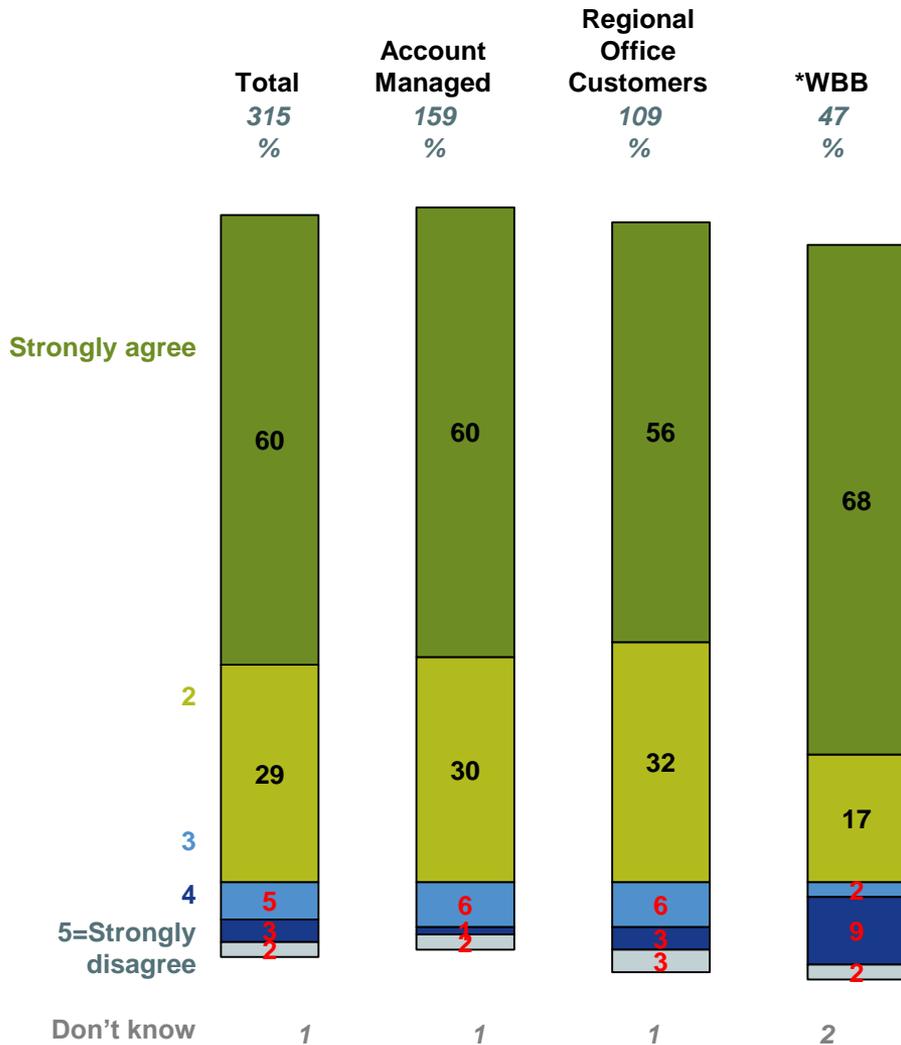
PROCESS MANAGEMENT



Key Performance Indicator – Process Management

‘Explained and agreed detailed requirements’

*Small Bases = less than 50

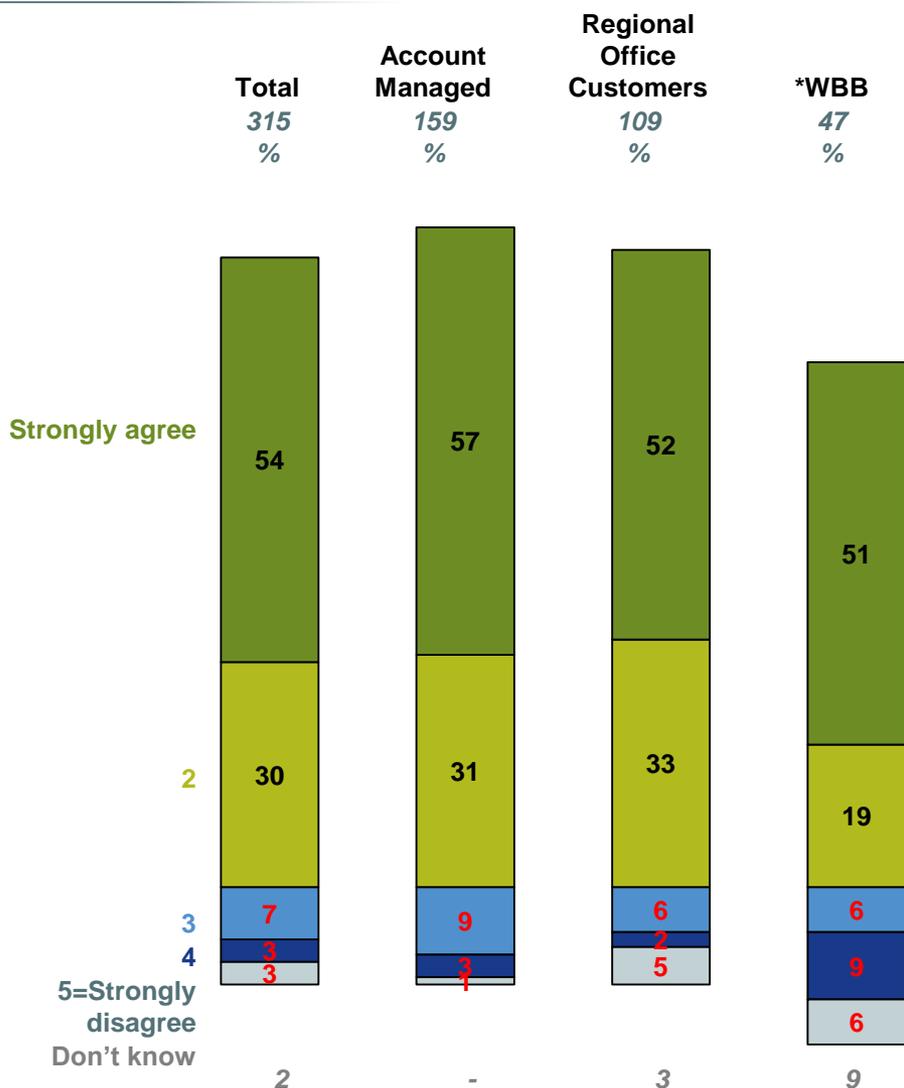


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Process Management

'Discussed and agreed a realistic timescale for planned activities'

**Small Bases = less than 50*

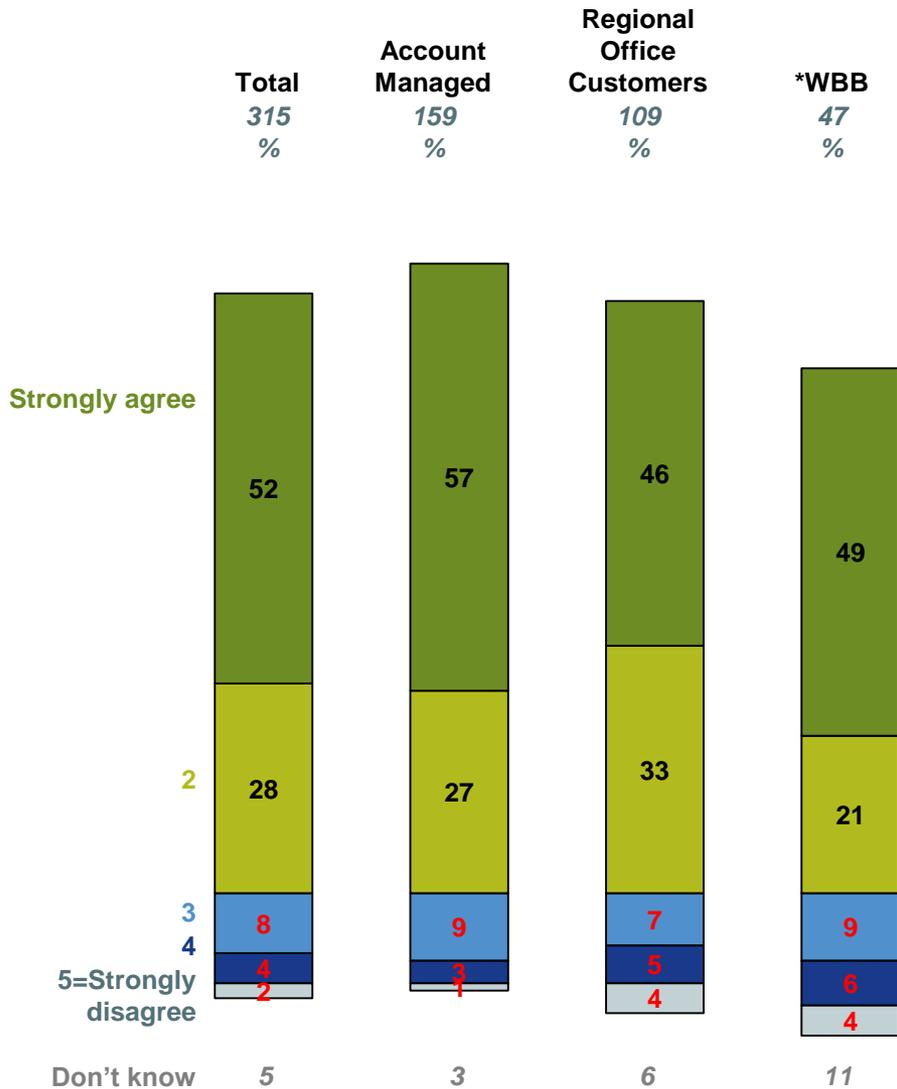


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Process Management

‘Completed activities according to the agreed timeline’

*Small Bases = less than 50

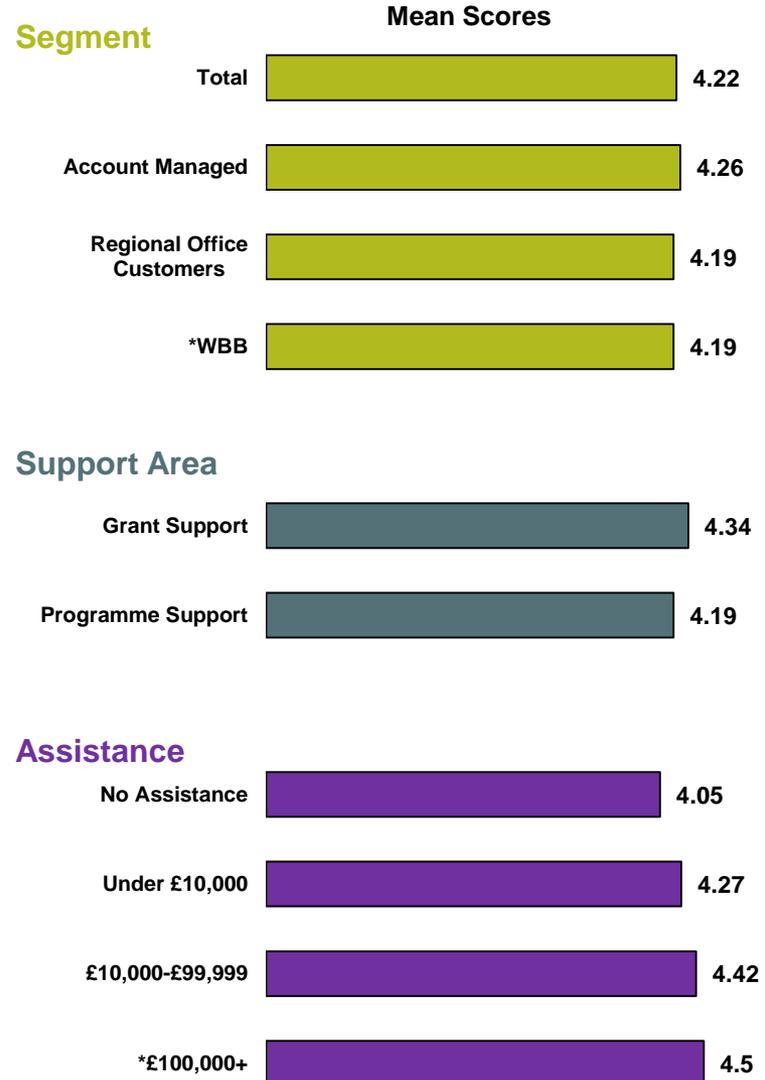
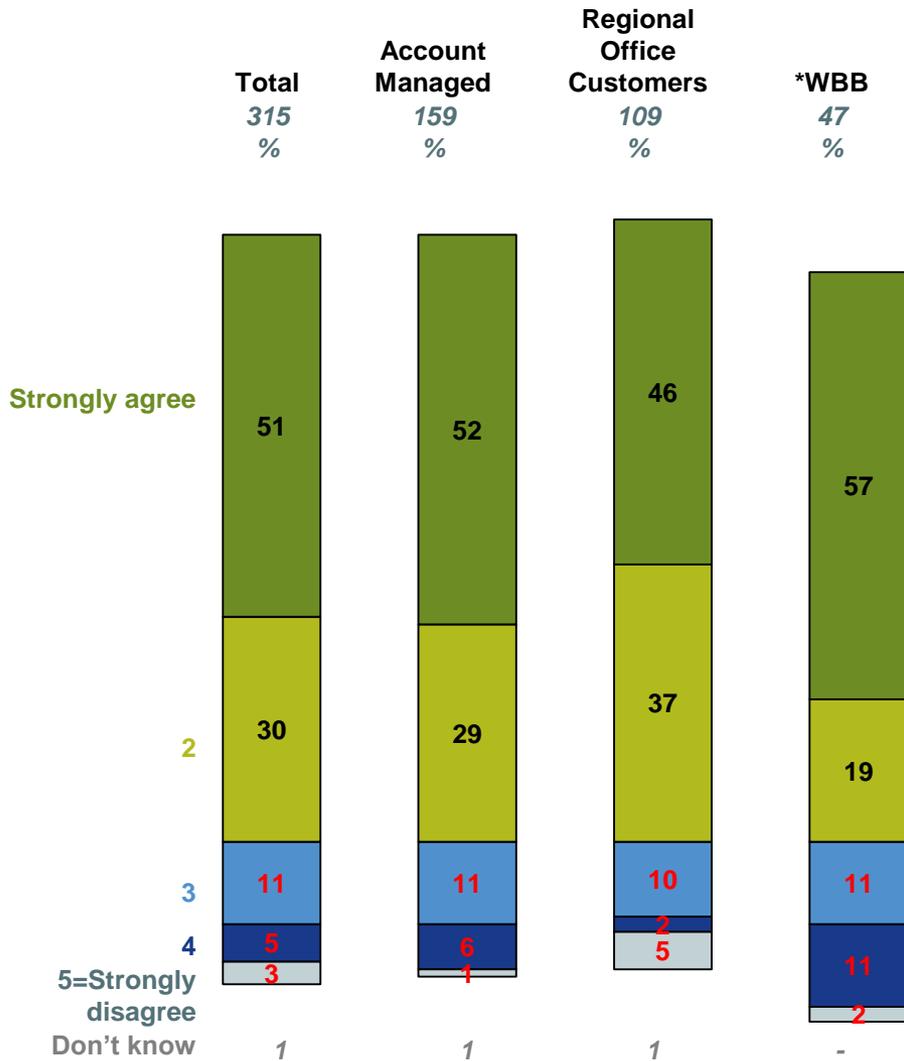


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Process Management

'Was proactive in providing advice and support'

**Small Bases = less than 50*

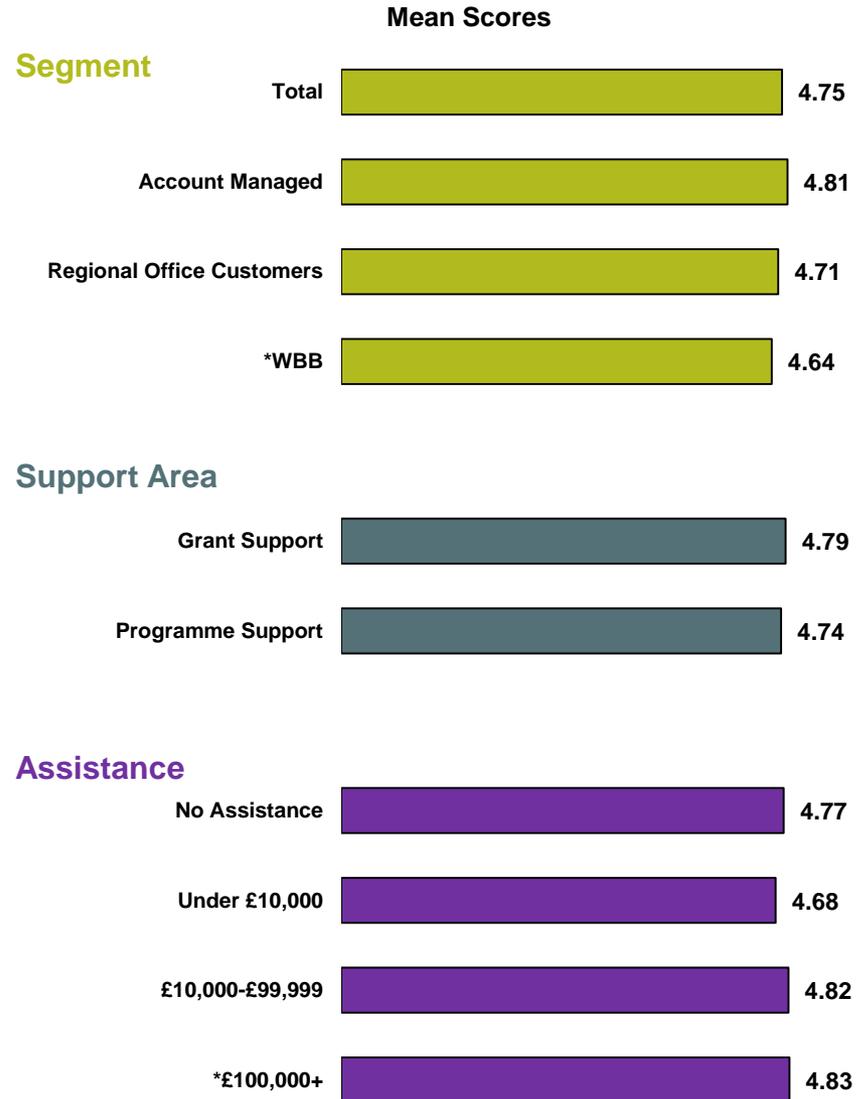
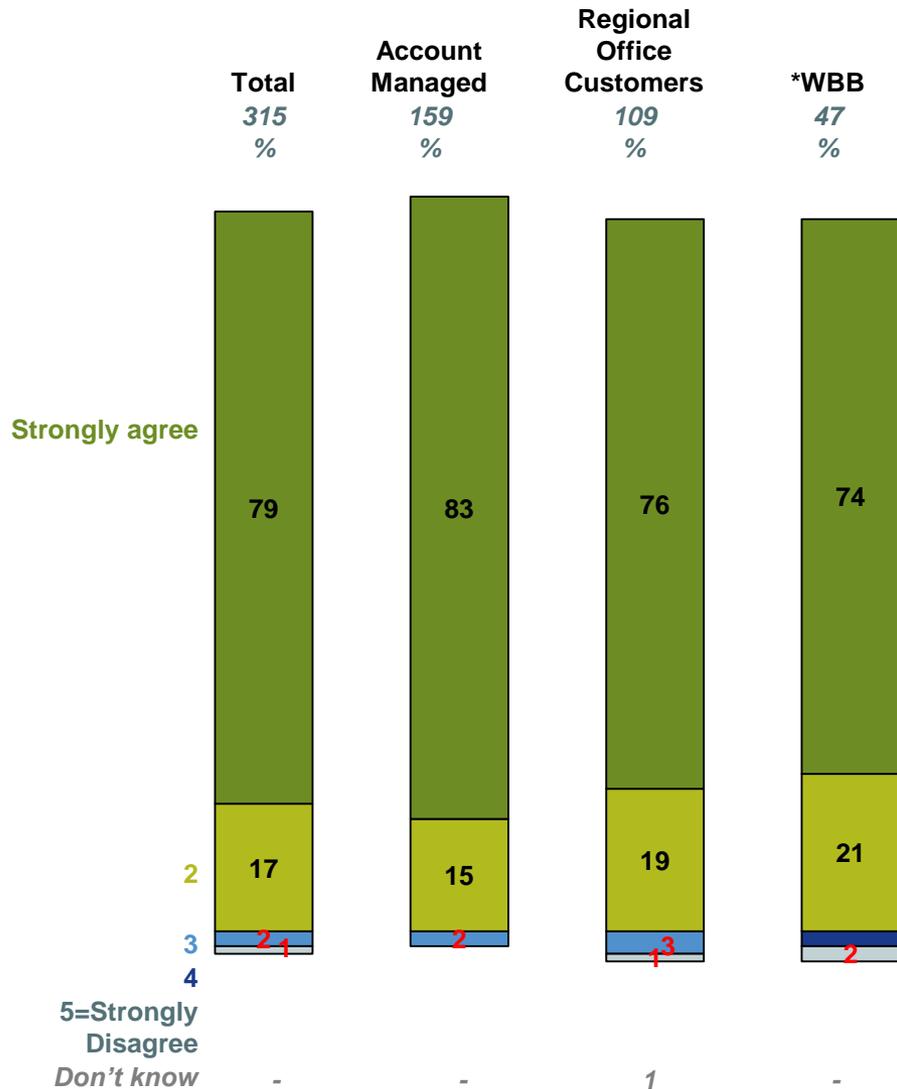


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

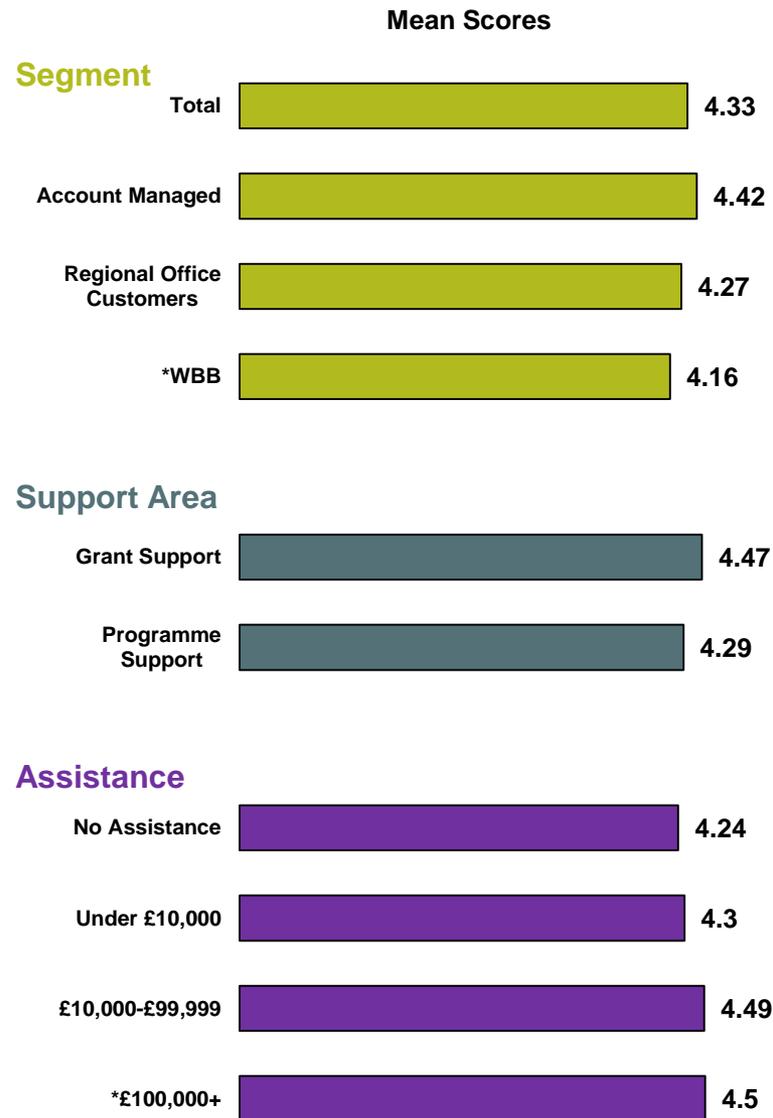
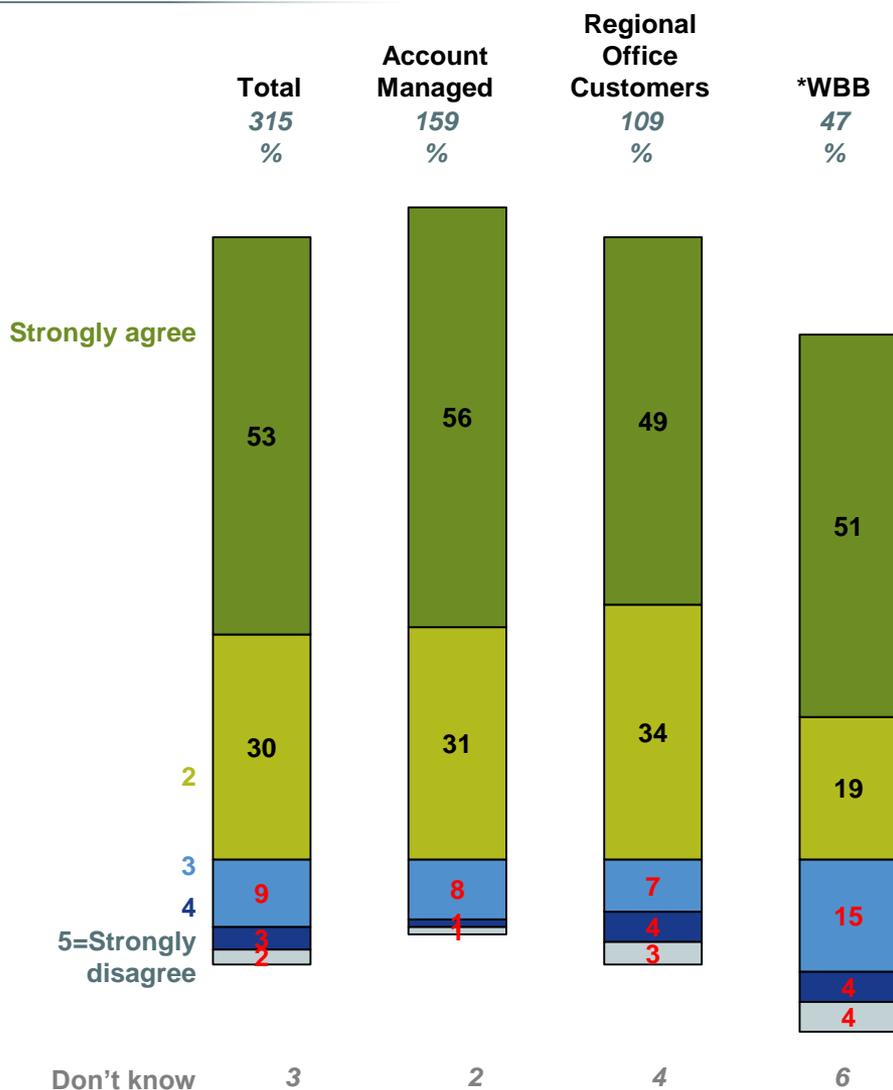
PROCESS COMMUNICATION



Key Performance Indicator – Process Communication

'Kept you informed of progress throughout the process'

*Small Bases = less than 50

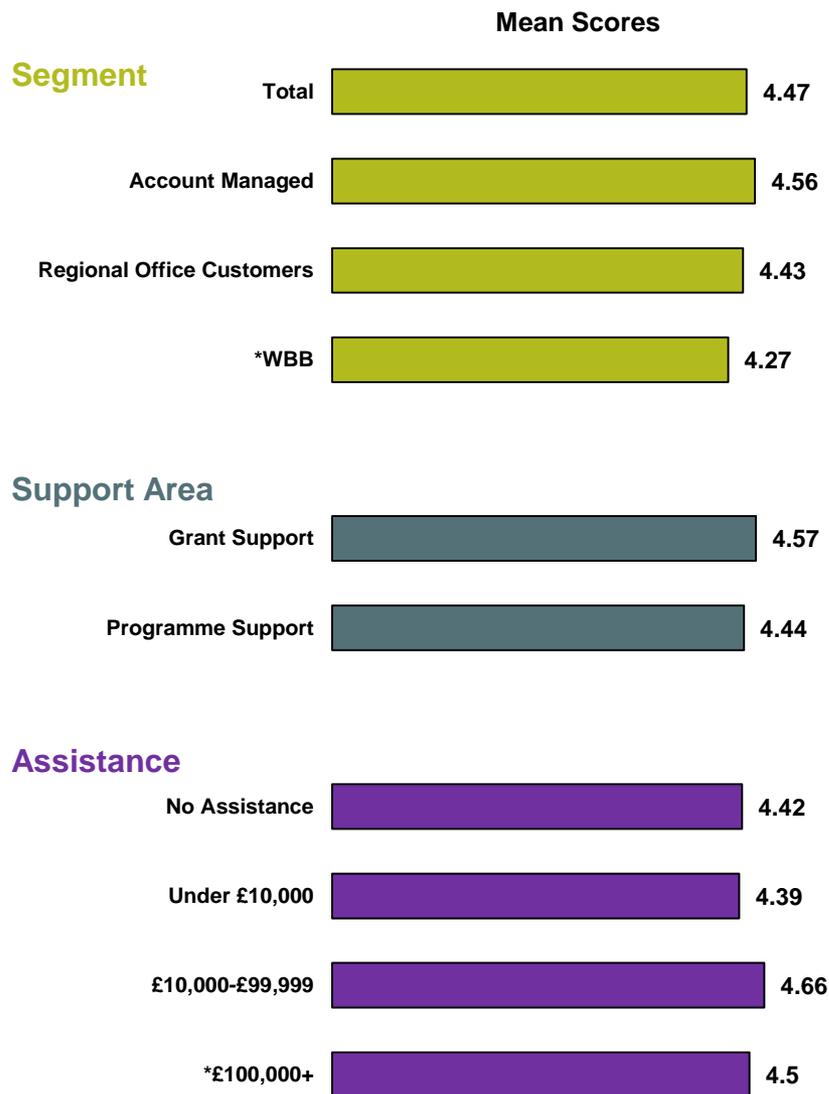
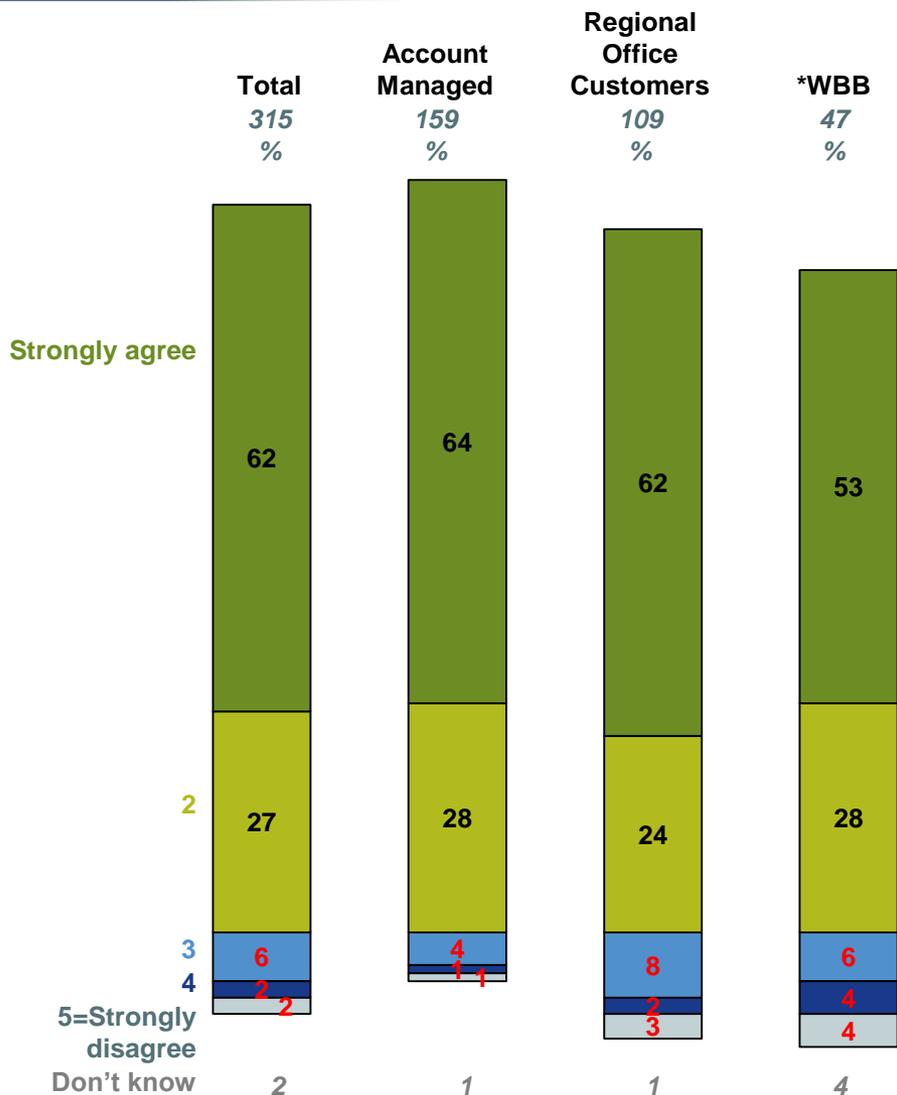


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Process Communication

‘Responded to your queries within a reasonable timeframe’

**Small Bases = less than 50*

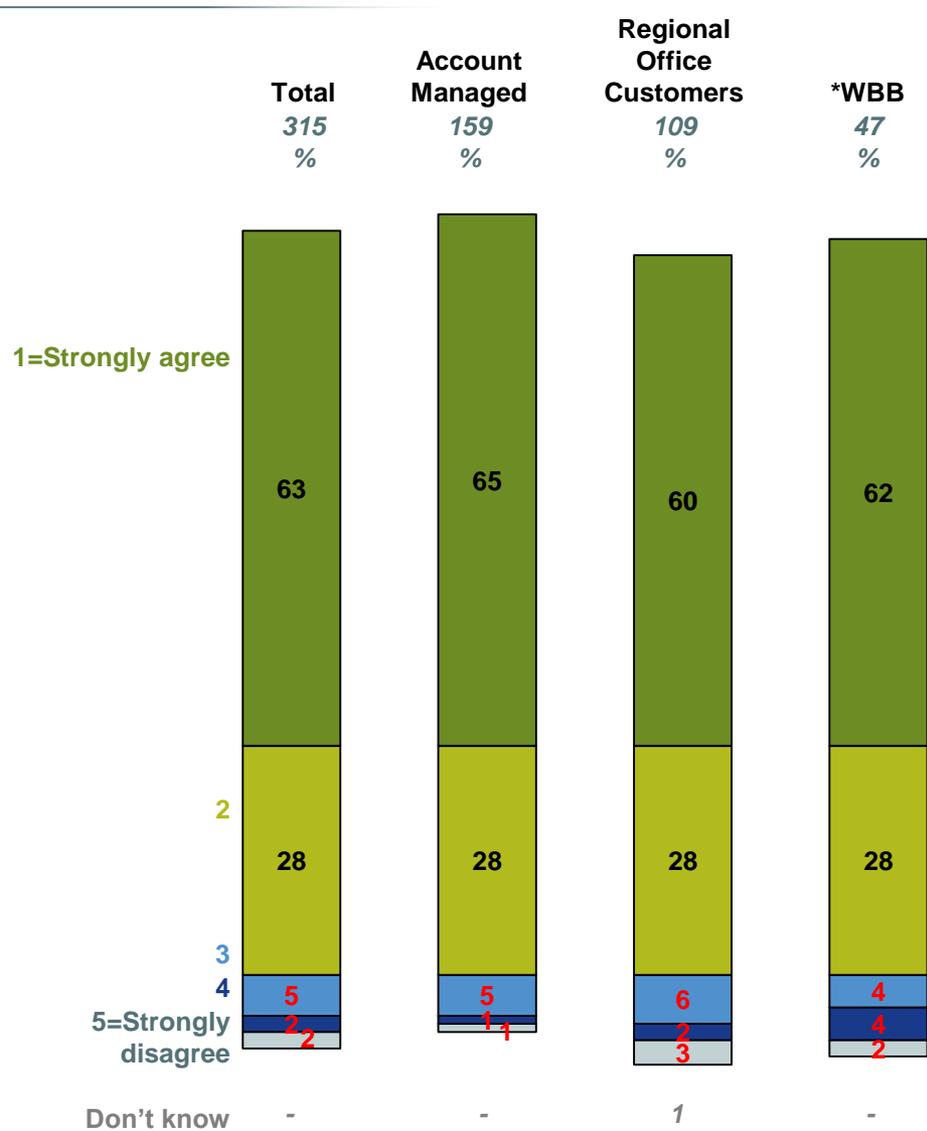


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

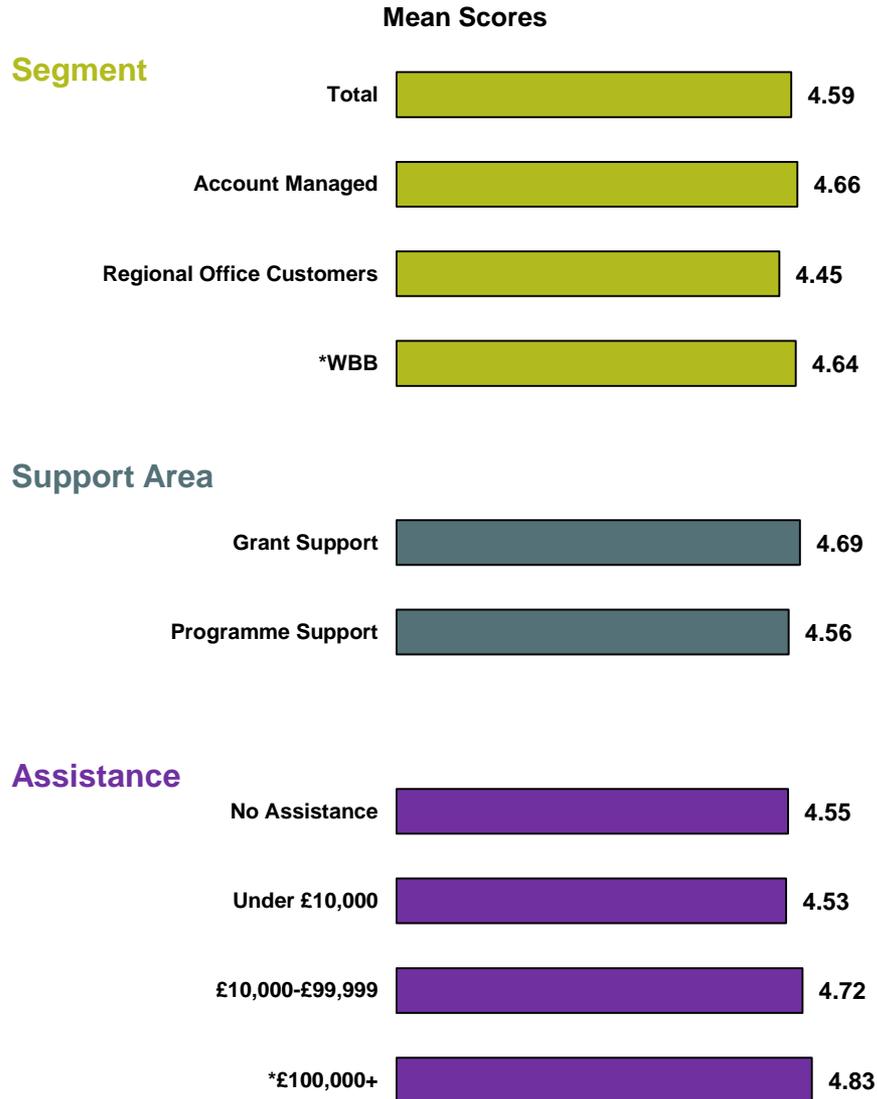
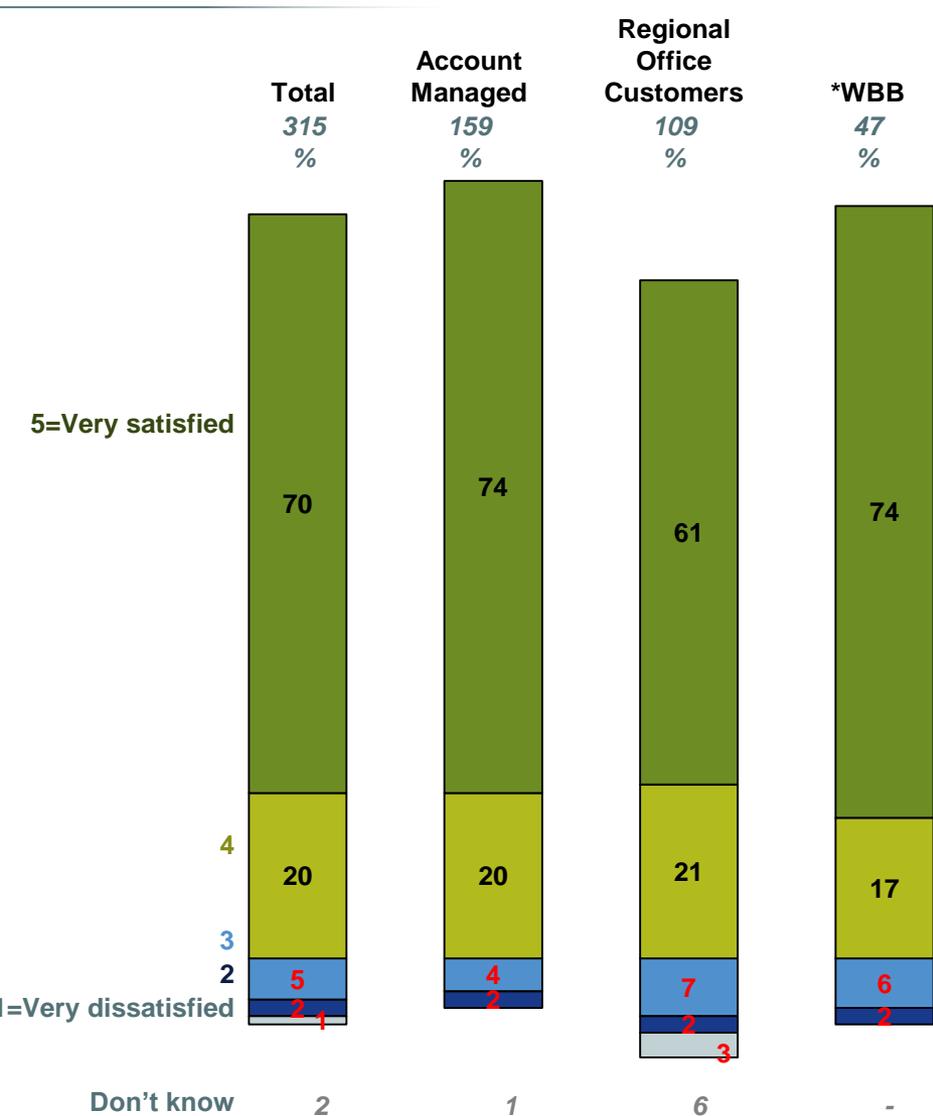
PEOPLE



Key Performance Indicator – People

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

*Small Bases = less than 50

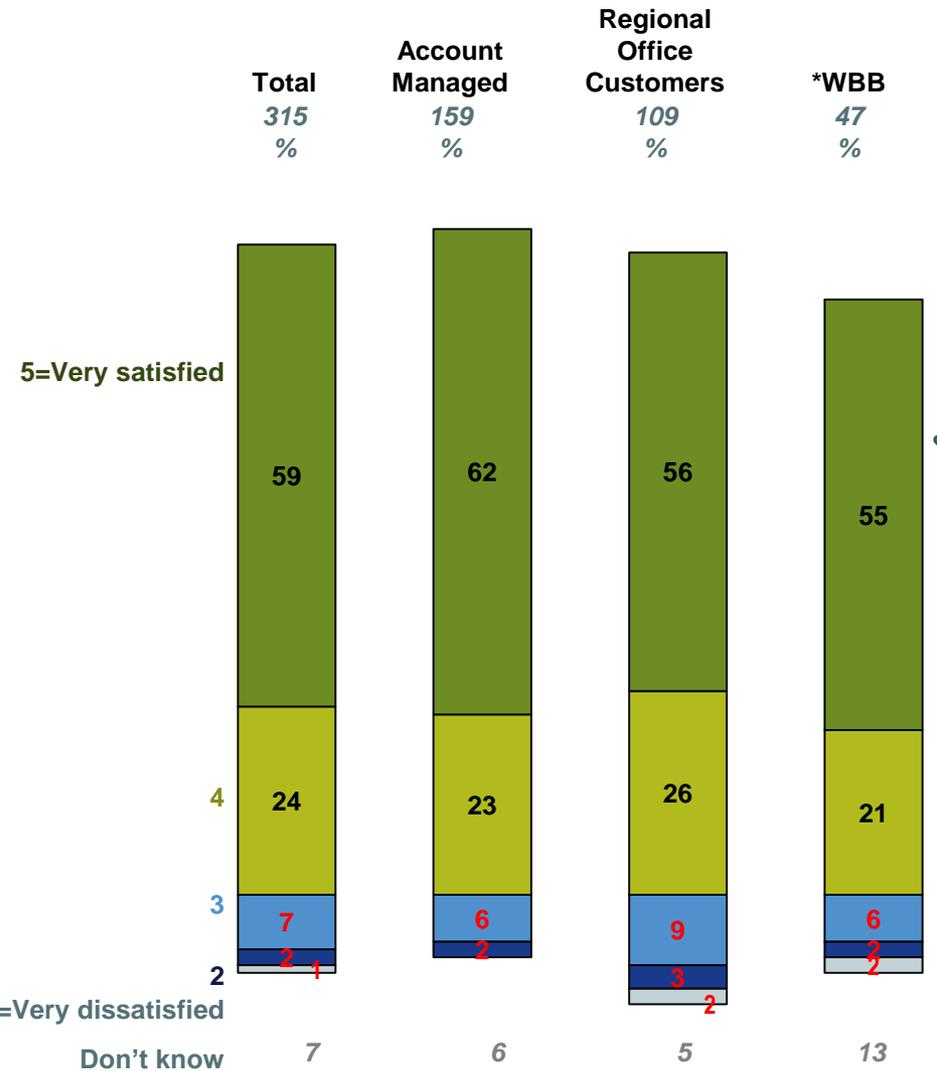


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

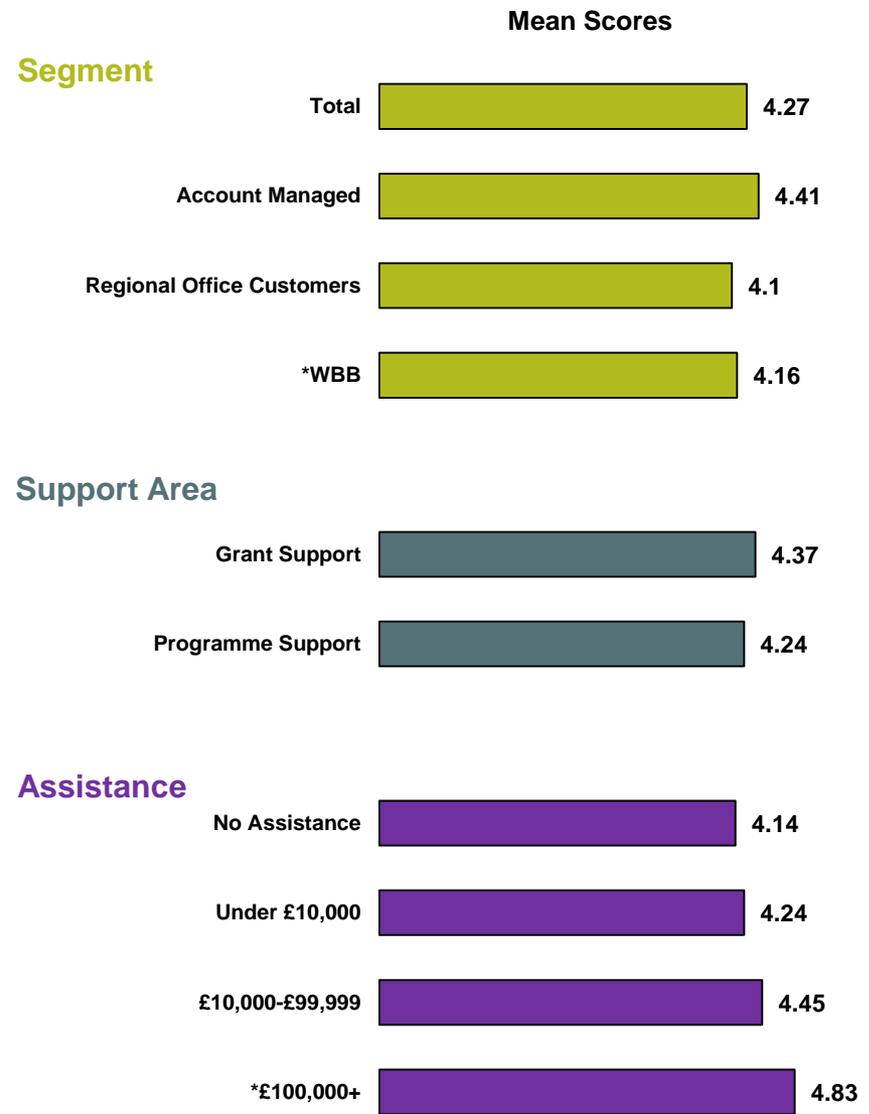
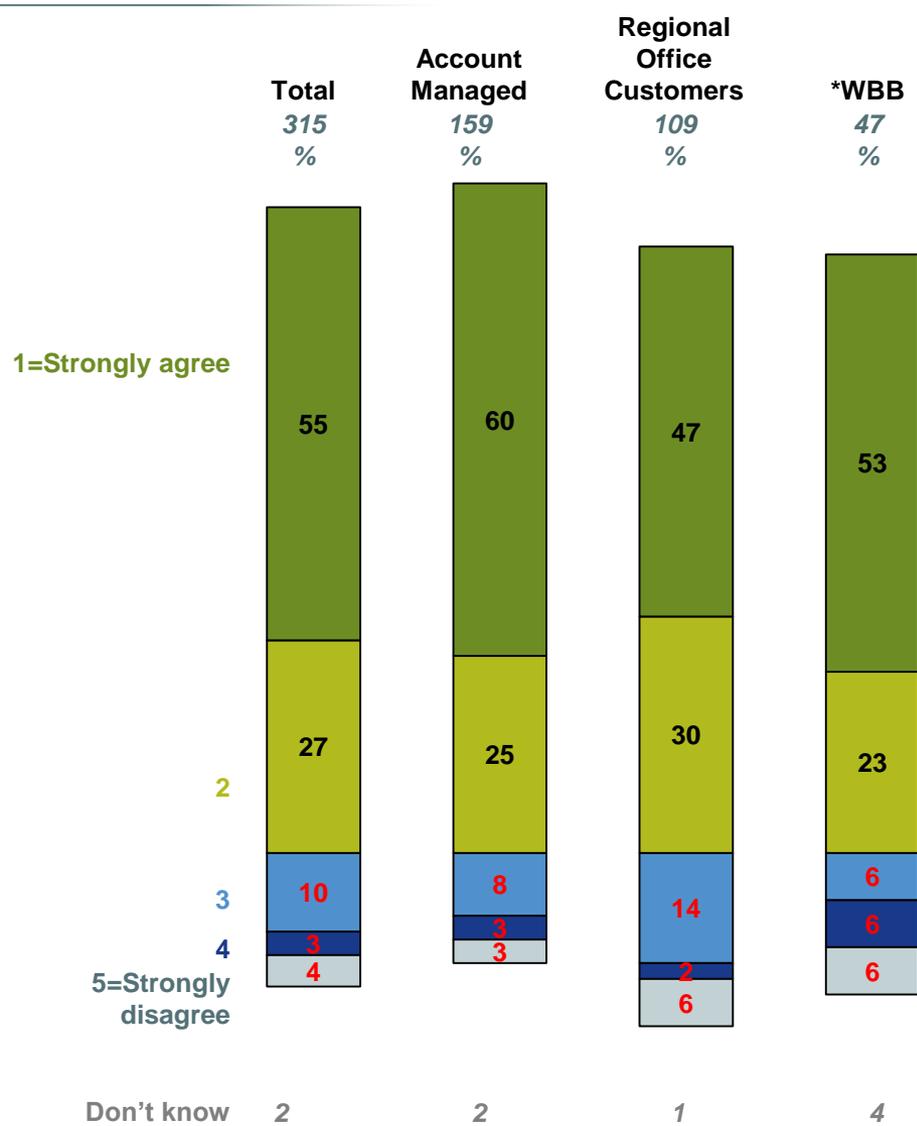
PERFORMANCE



Key Performance Indicator – Performance

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

*Small Bases = less than 50

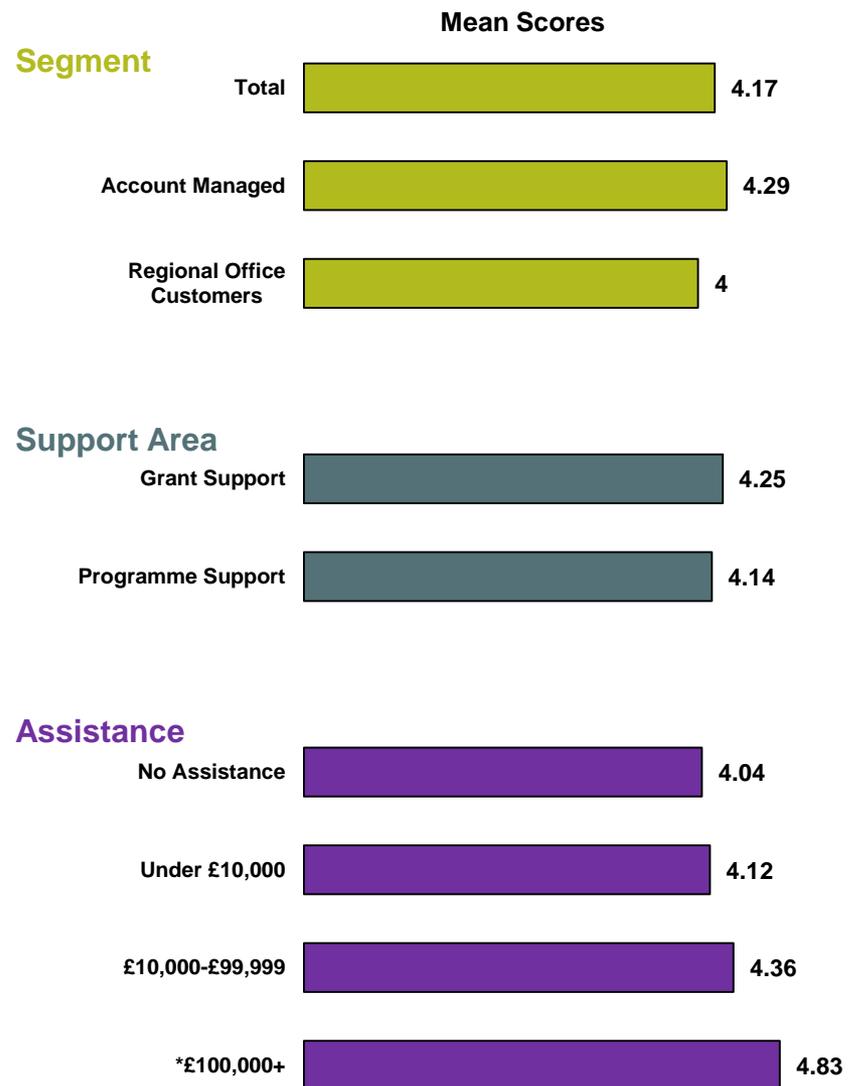
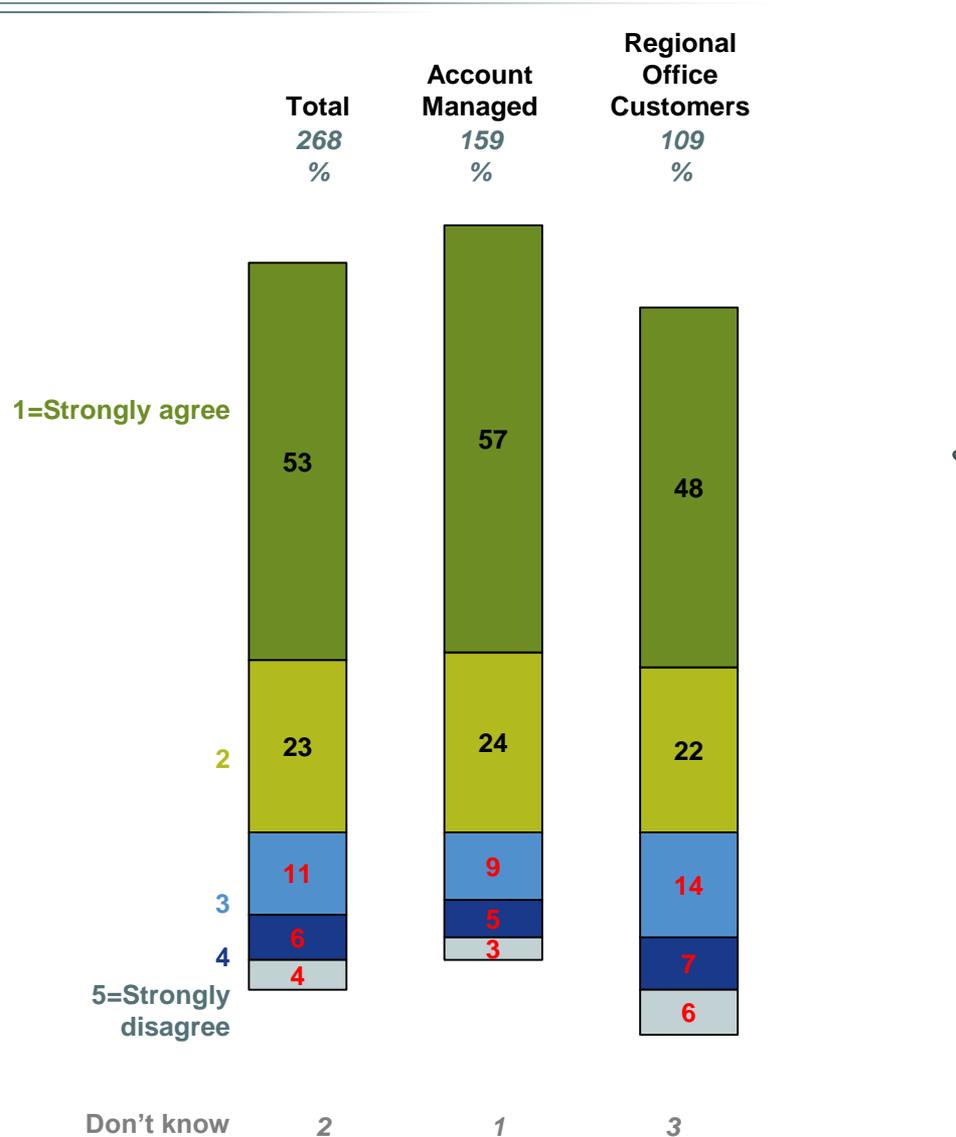


Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Performance

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

*Small Bases = less than 50

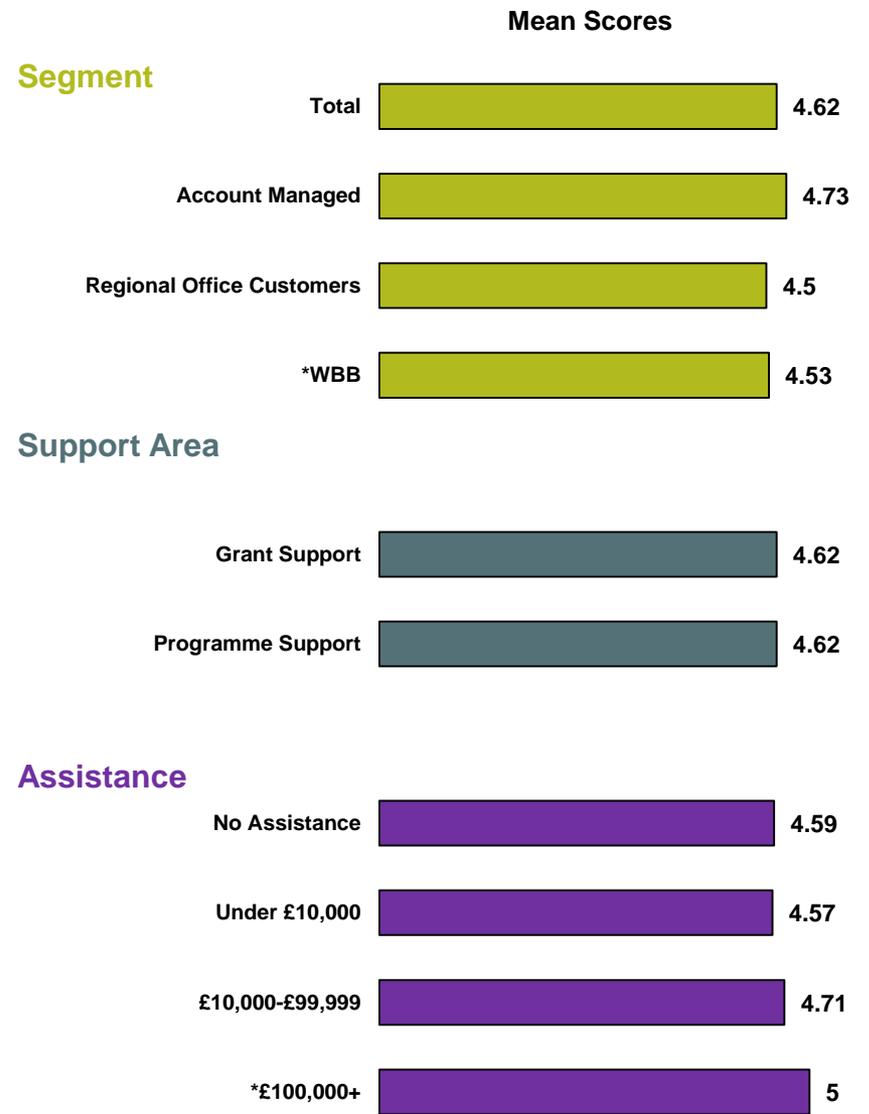
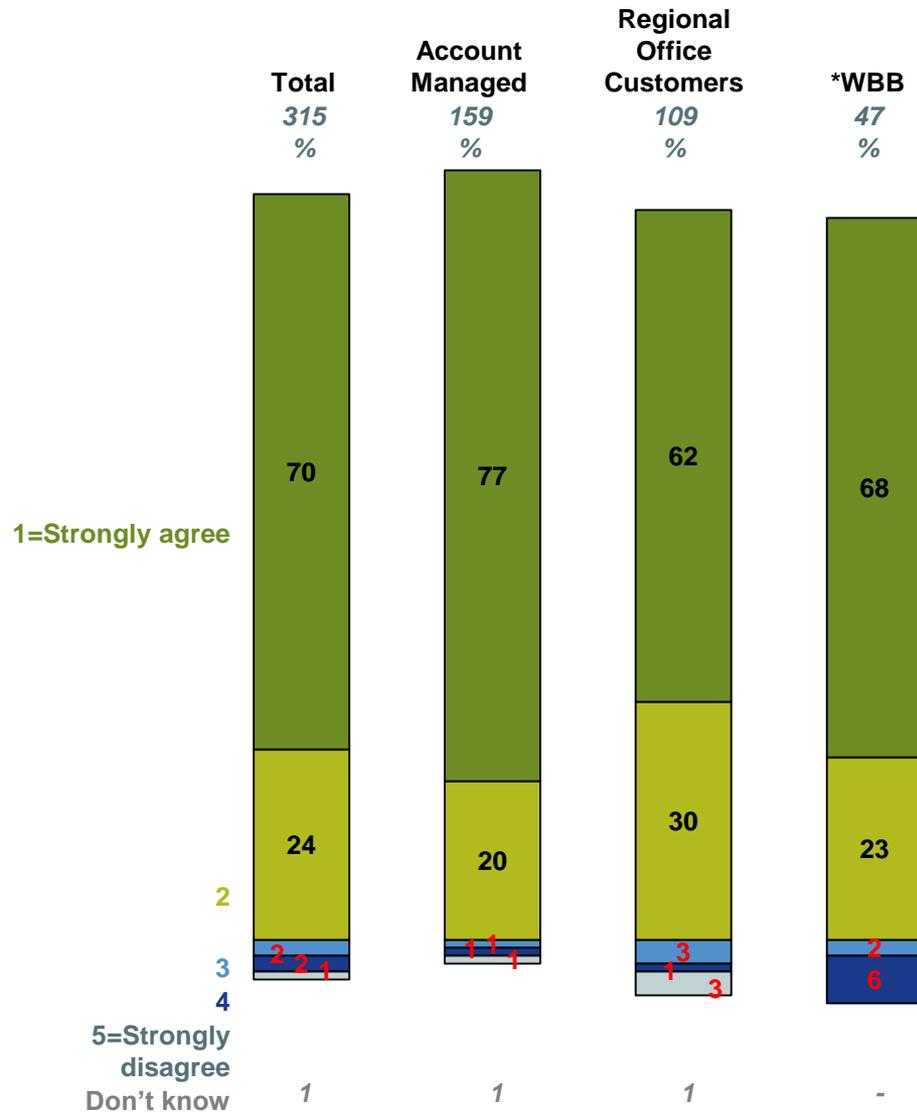


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 268 July-Oct '16 (159 Account Managed and 109 Regional Office Customers)]

Key Performance Indicator – Performance

‘Invest NI acts with professionalism and integrity’

**Small Bases = less than 50*

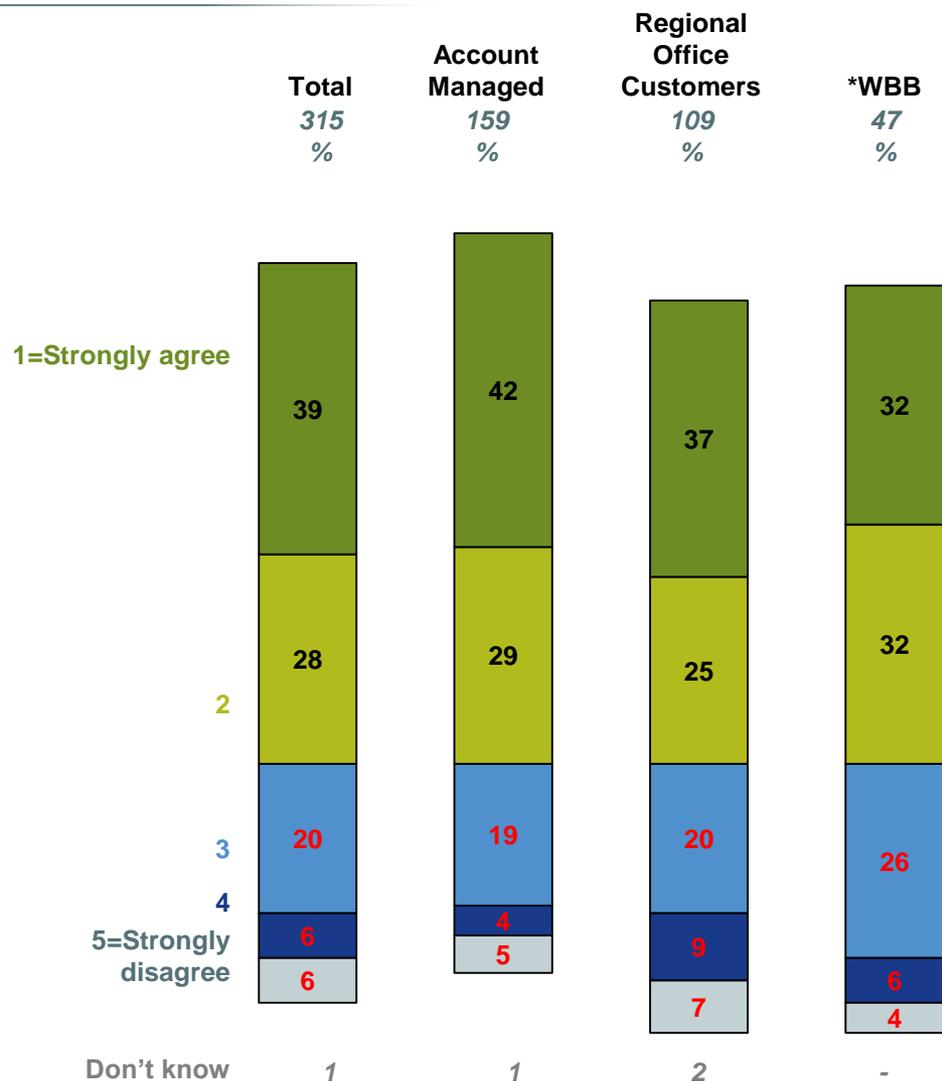


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Performance

'Invest NI exceeded my expectations'

**Small Bases = less than 50*

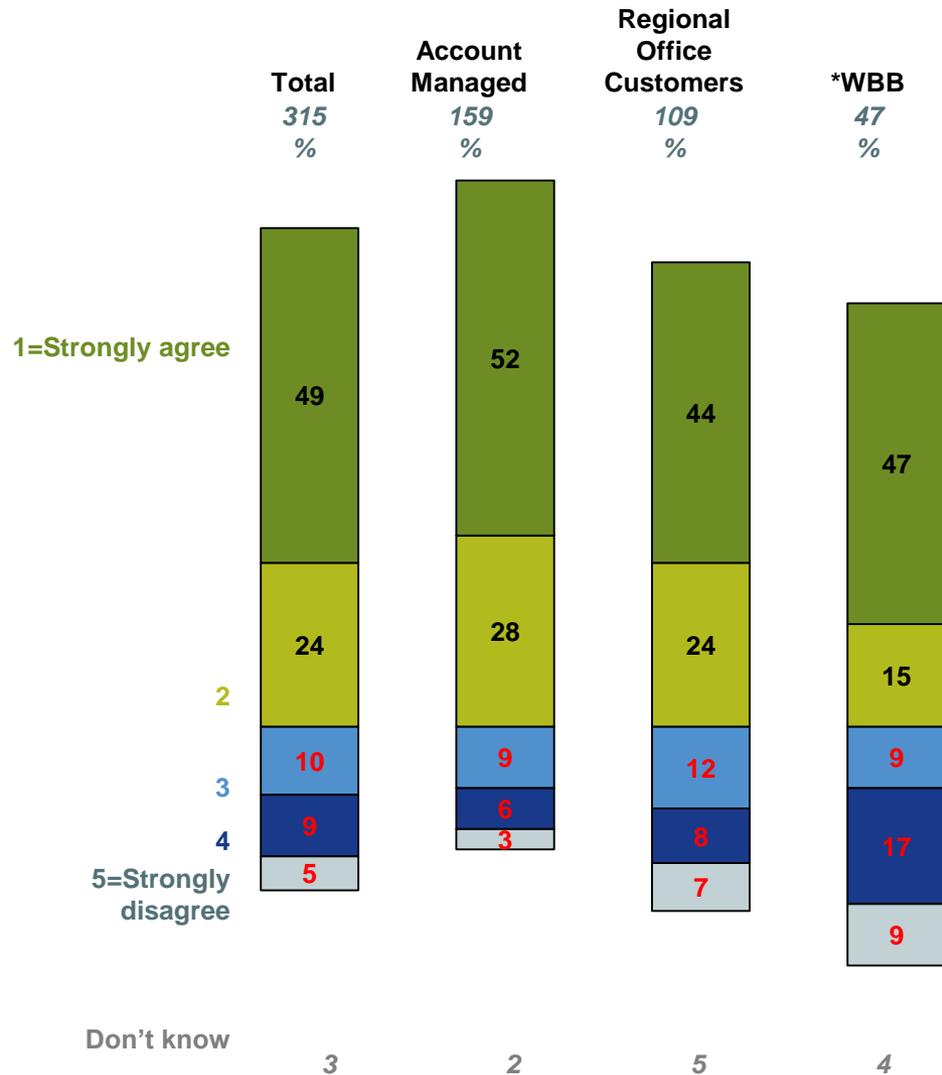


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Performance

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

**Small Bases = less than 50*

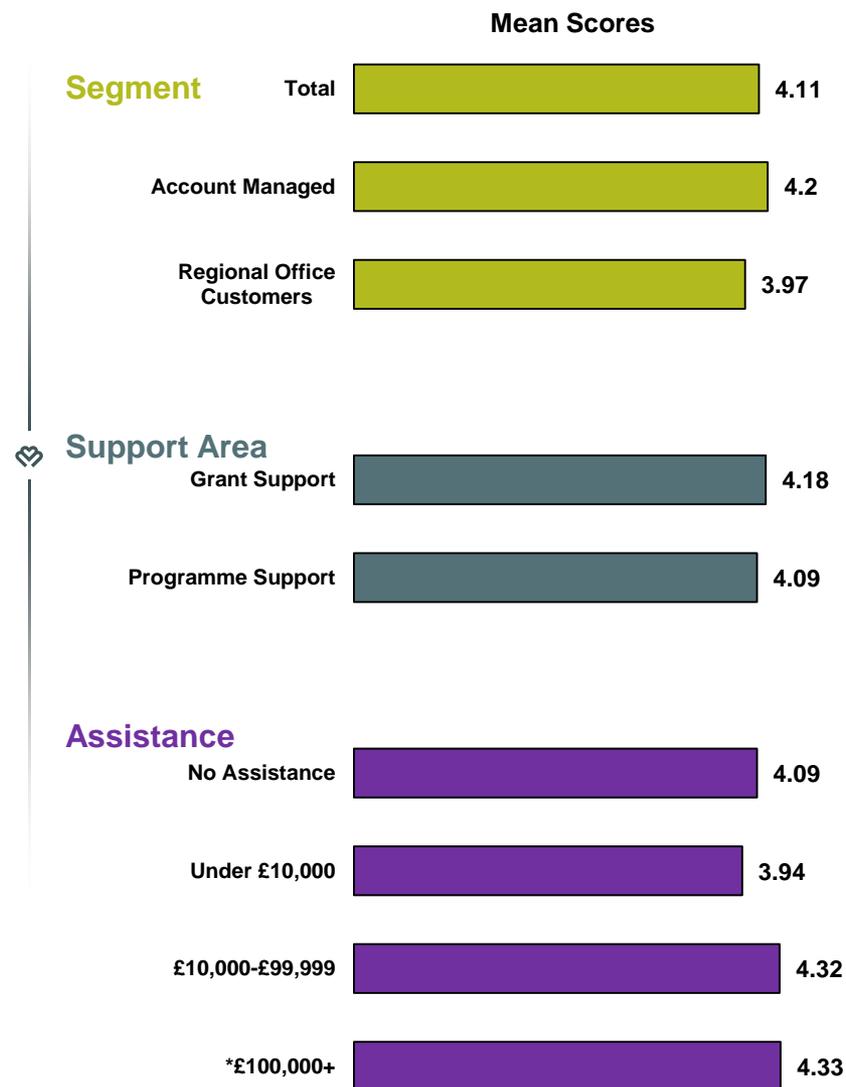
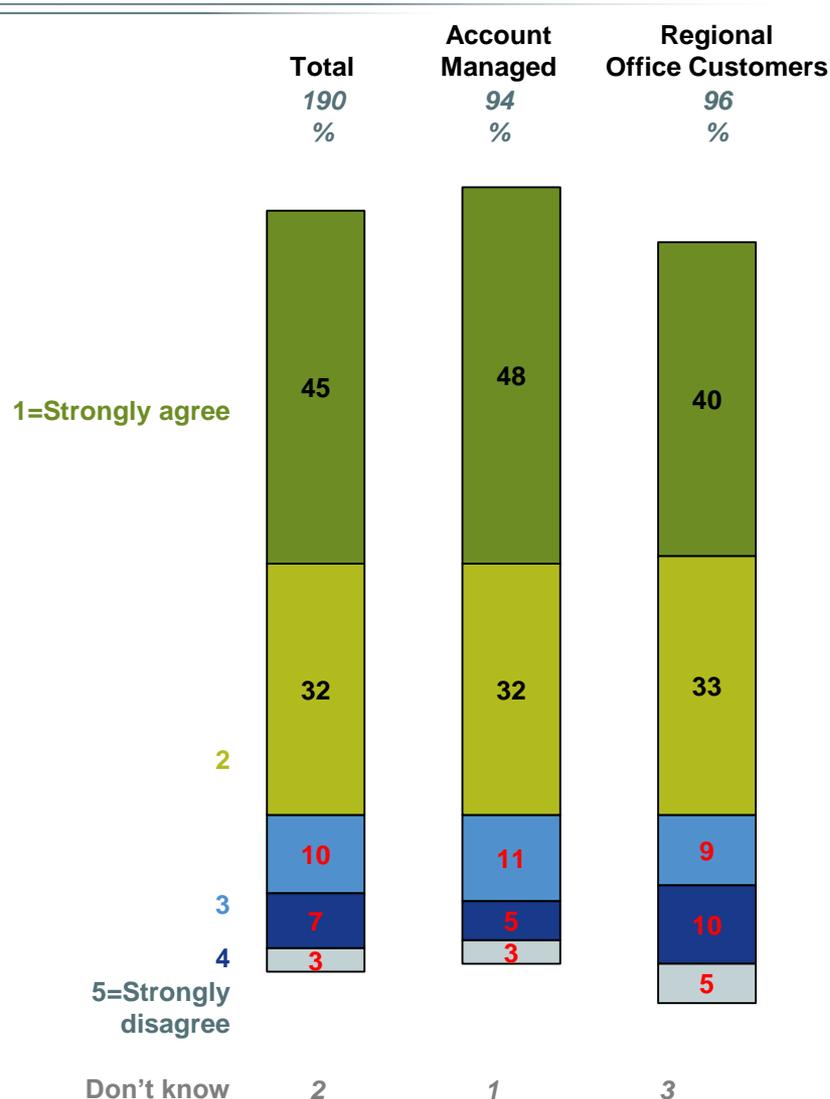


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

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'

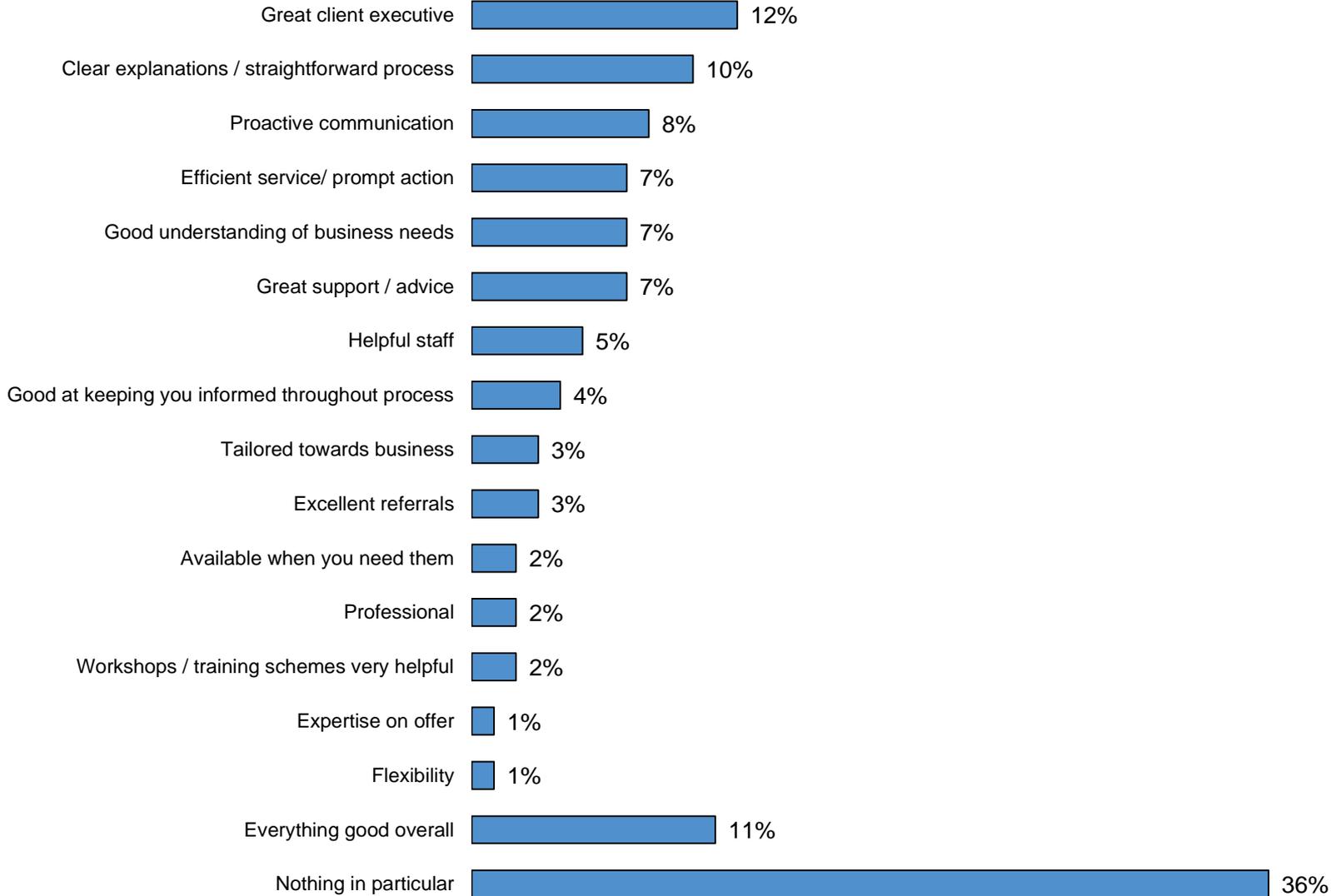
**Small Bases = less than 50*



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: 268 July-Oct '16 (159 Account Managed and 109 Regional Office Customers)]

Key Performance Indicator – Performance

‘What Invest NI did particularly well’

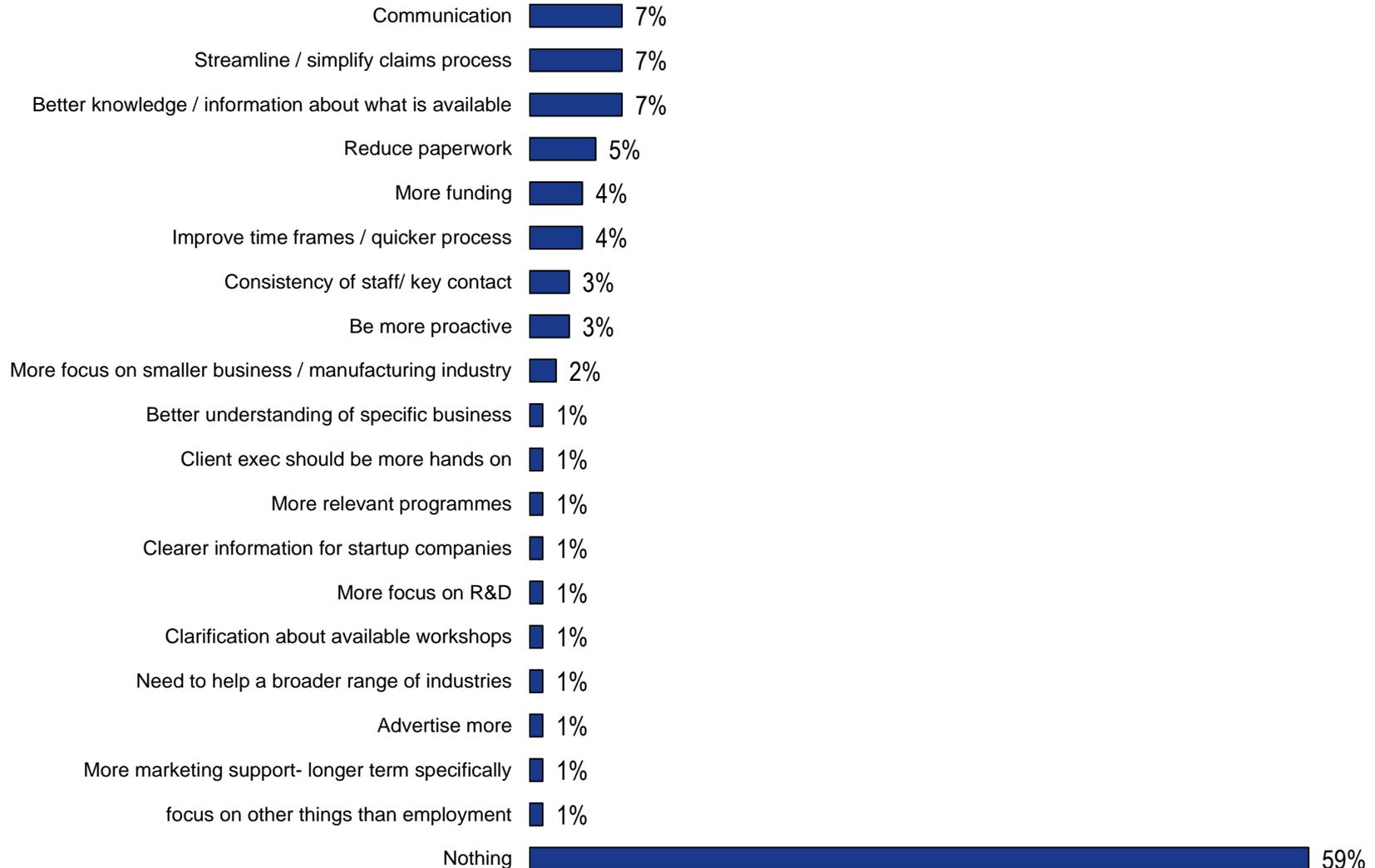


Is there anything that you think Invest NI did particularly well in the lead up to your offer of assistance?

[Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Performance

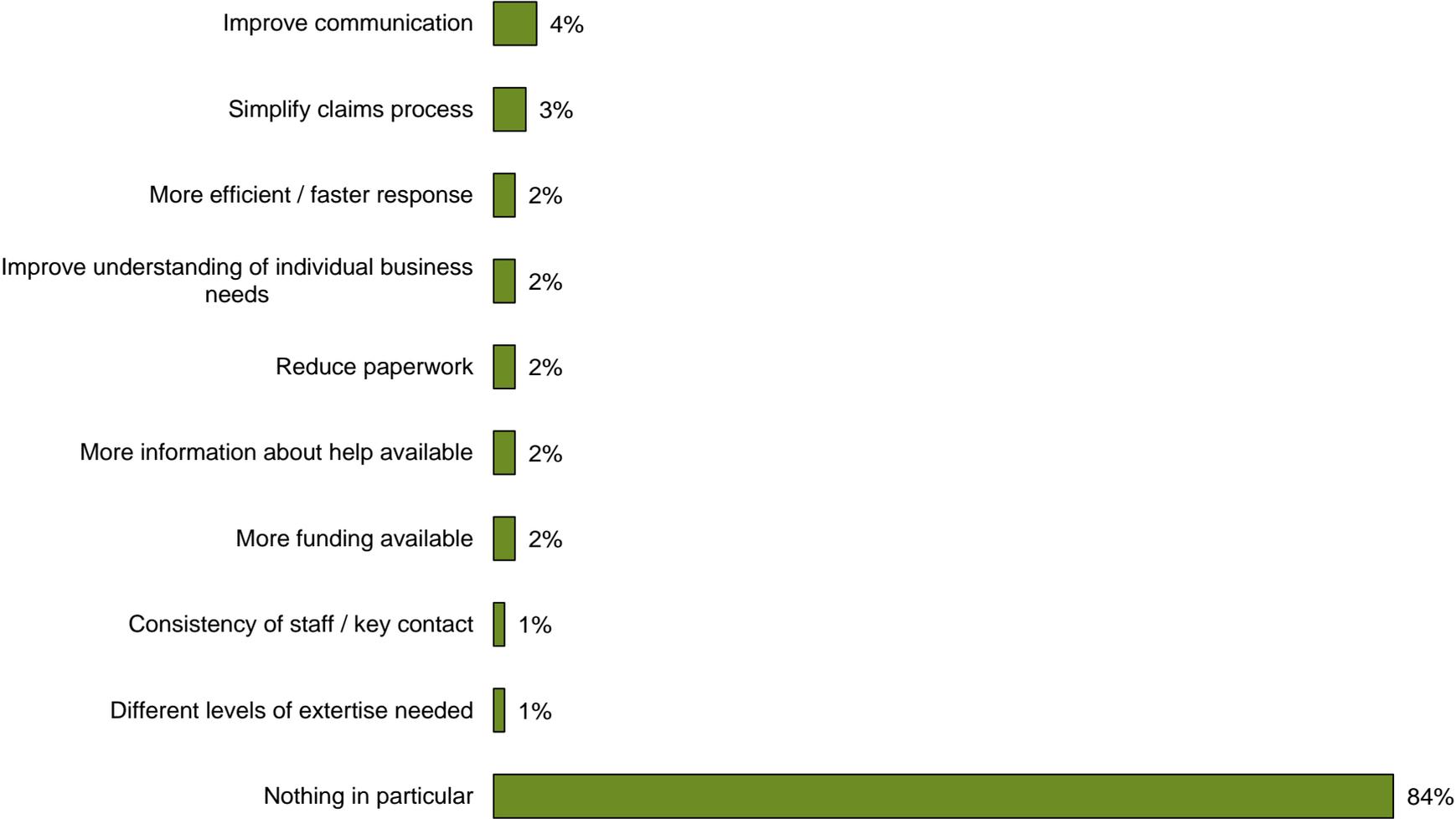
‘Anything organisation could do to improve the overall service they provide’



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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Key Performance Indicator – Performance

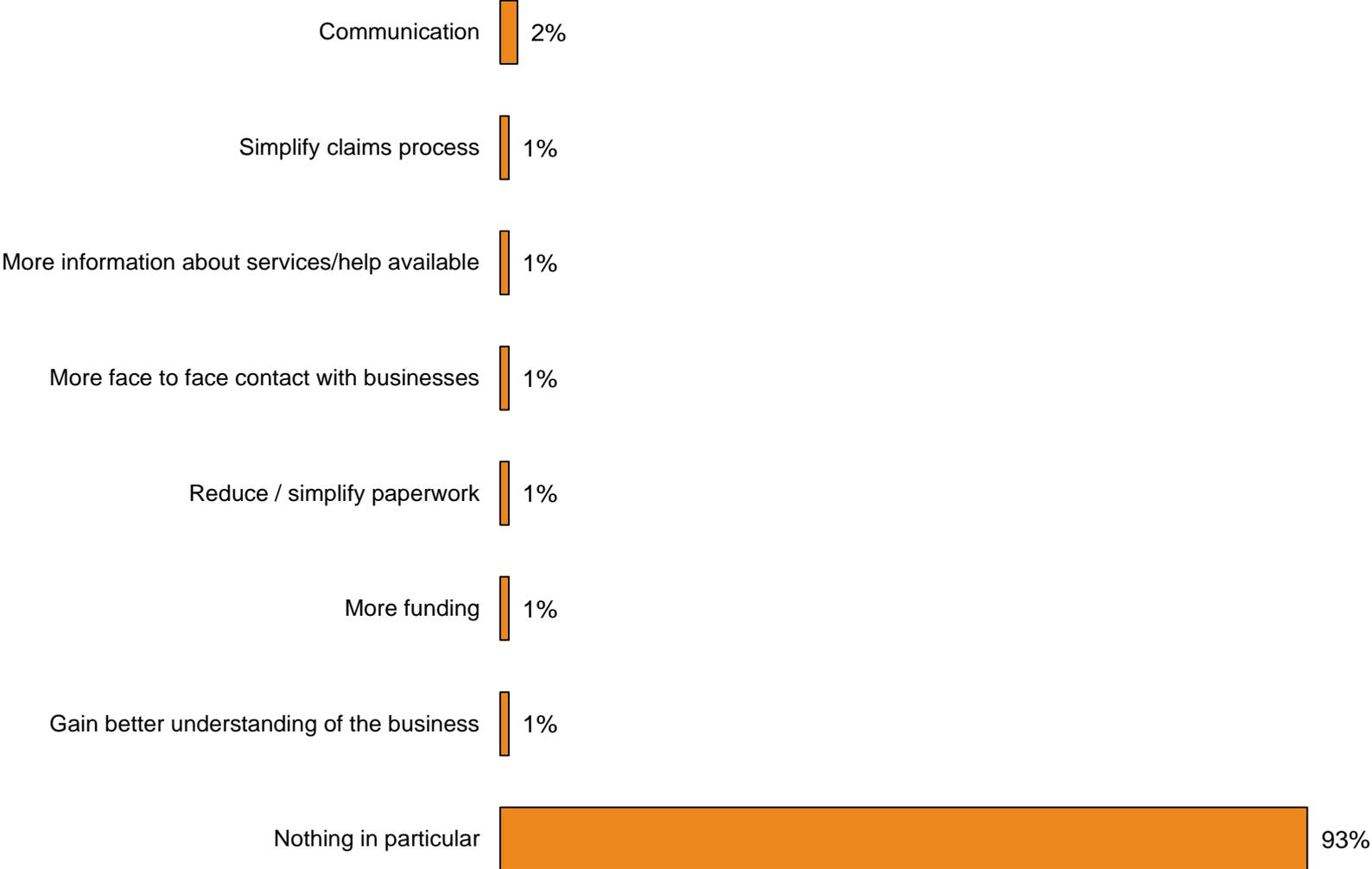
‘Anything organisation could have done better’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done better?
[Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

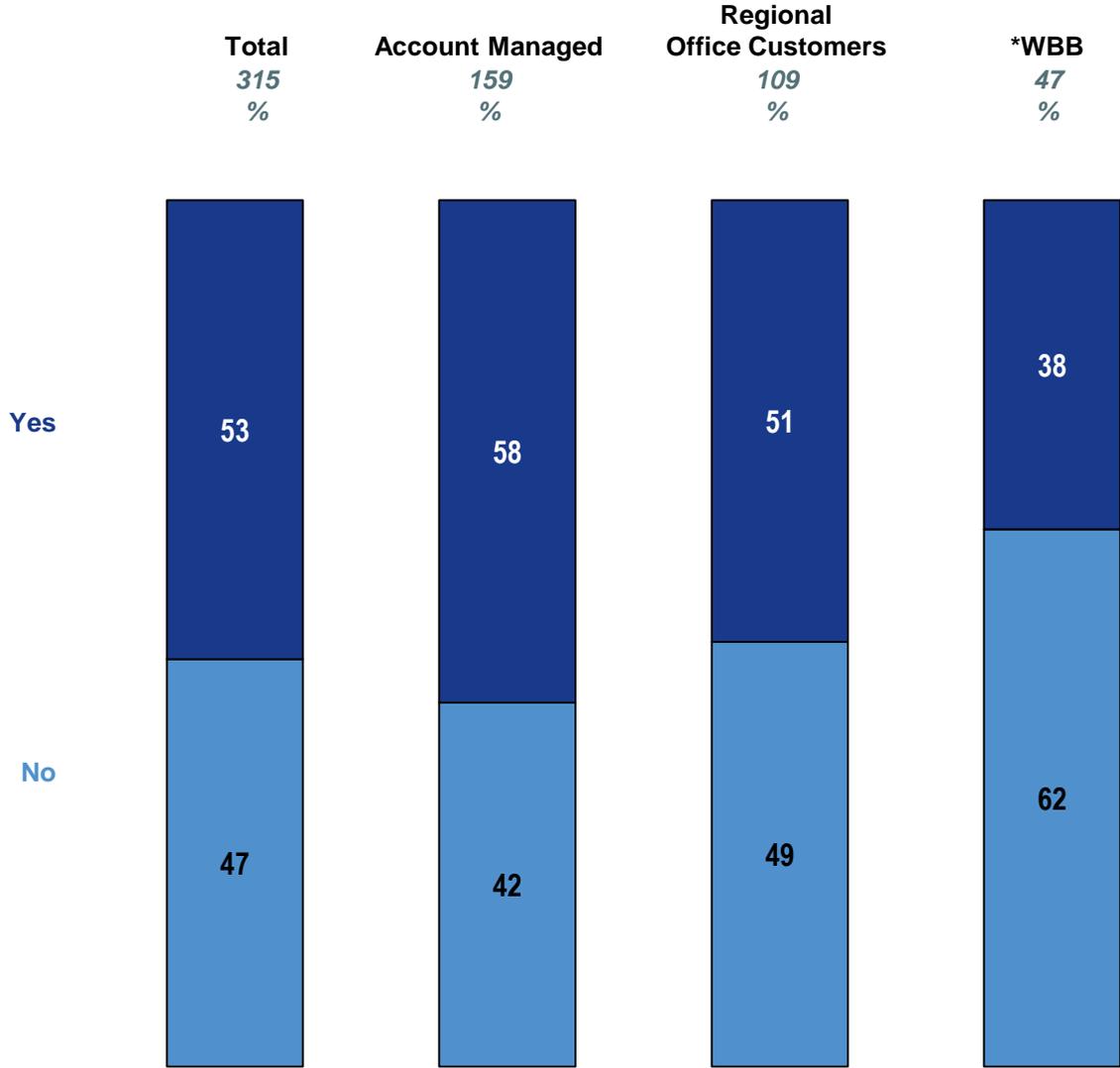
Key Performance Indicator – Performance

‘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: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

Actively Discussing Application for Additional Support



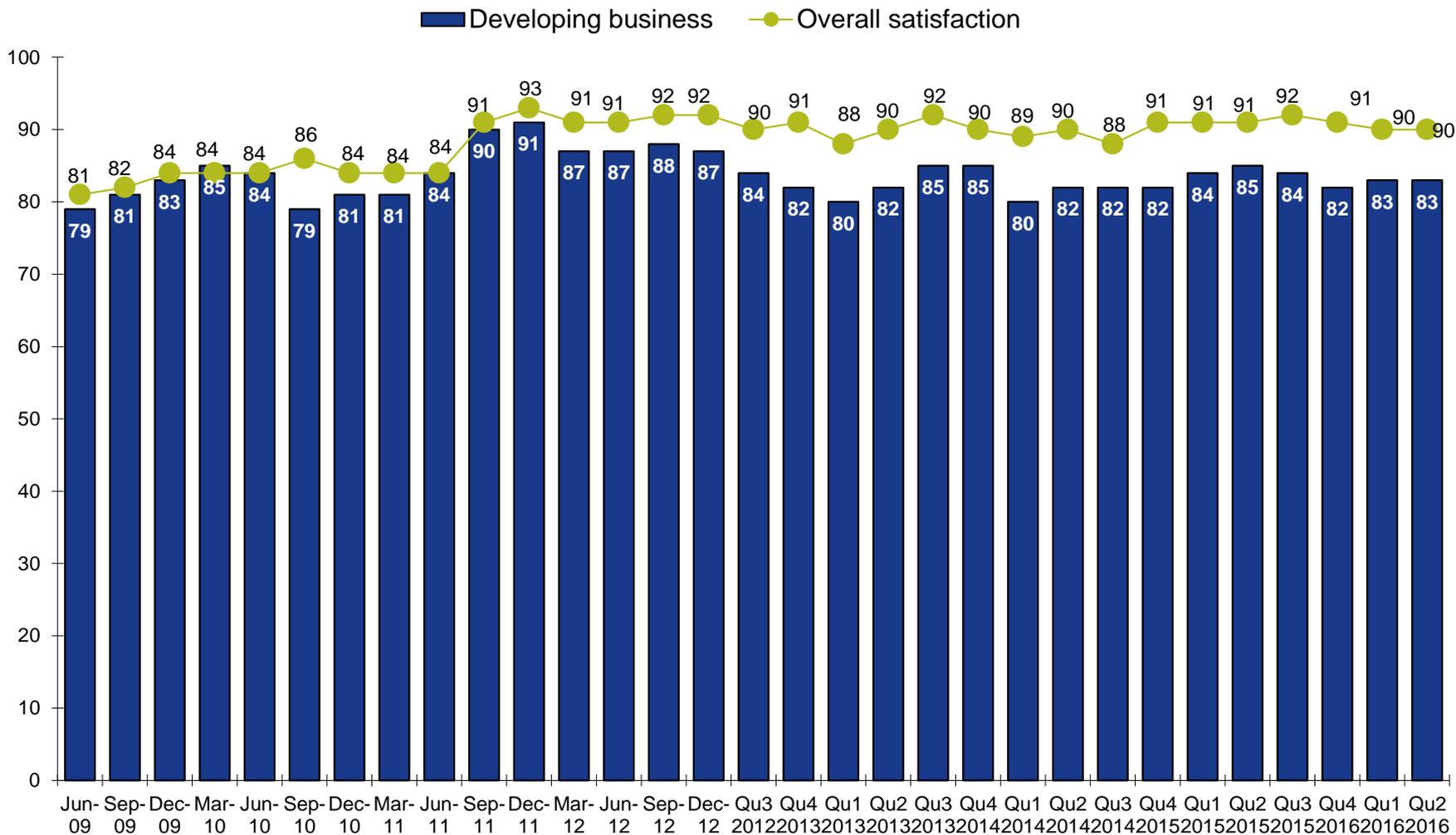
Are you actively discussing an application for additional support services at present?
 [Base: 315 July-Oct '16 (159 Account Managed, 109 Regional Office Customers and 47 WBB)]

ROLLING AVERAGES



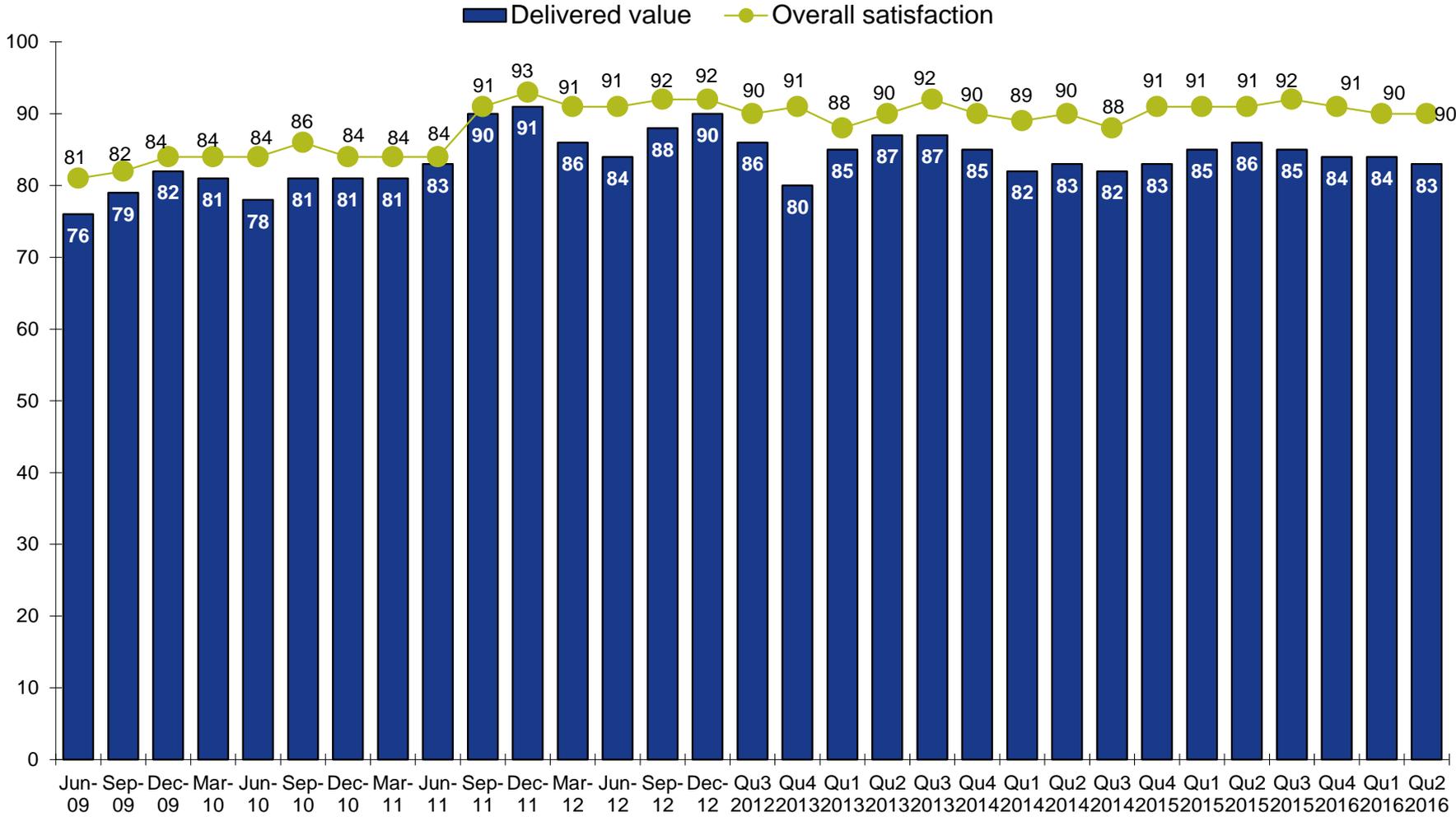
Satisfaction and key driver variables: INI is helping to develop my business

Six month rolling average



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

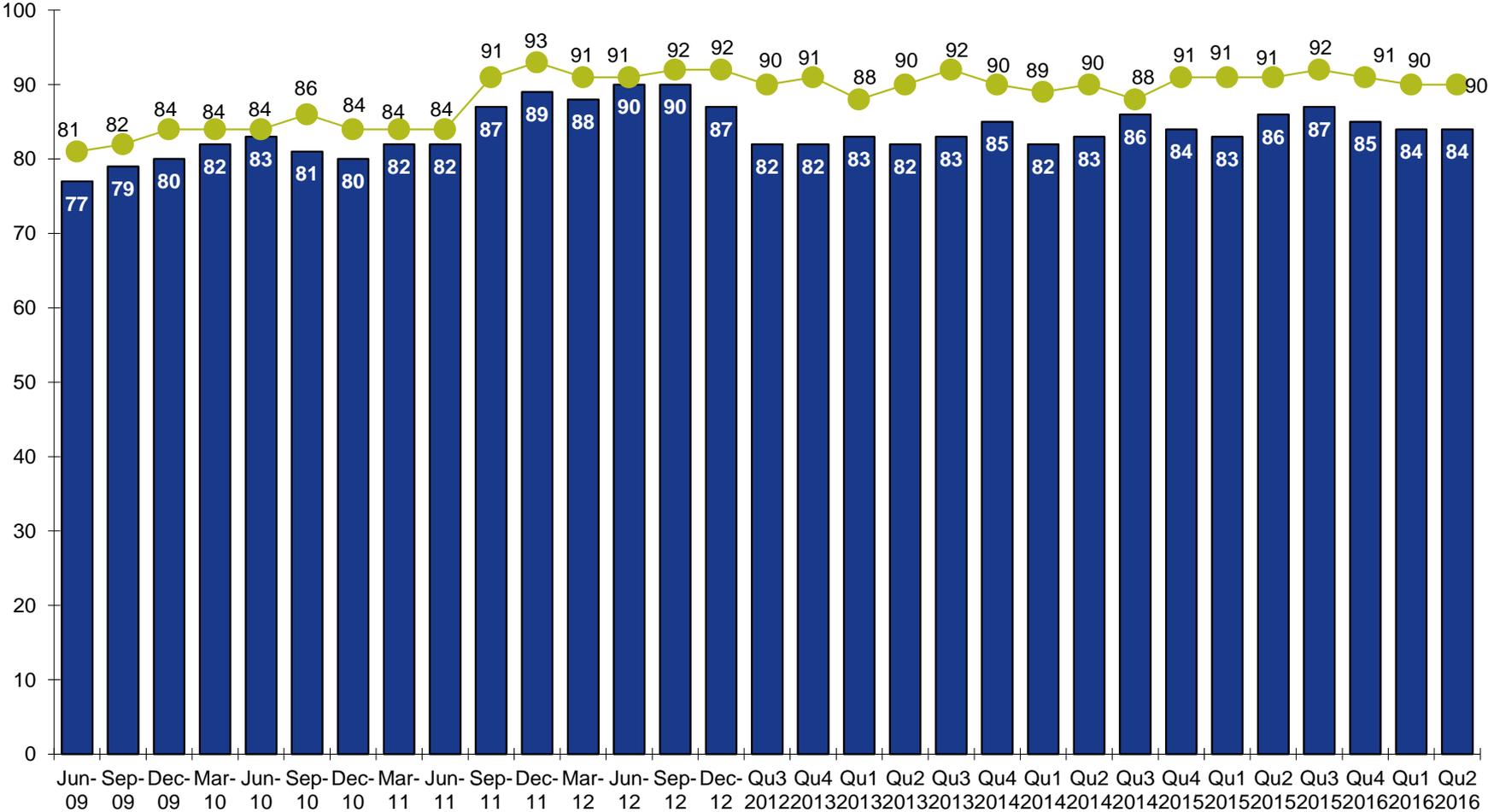
Six month rolling average



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

Six month rolling average

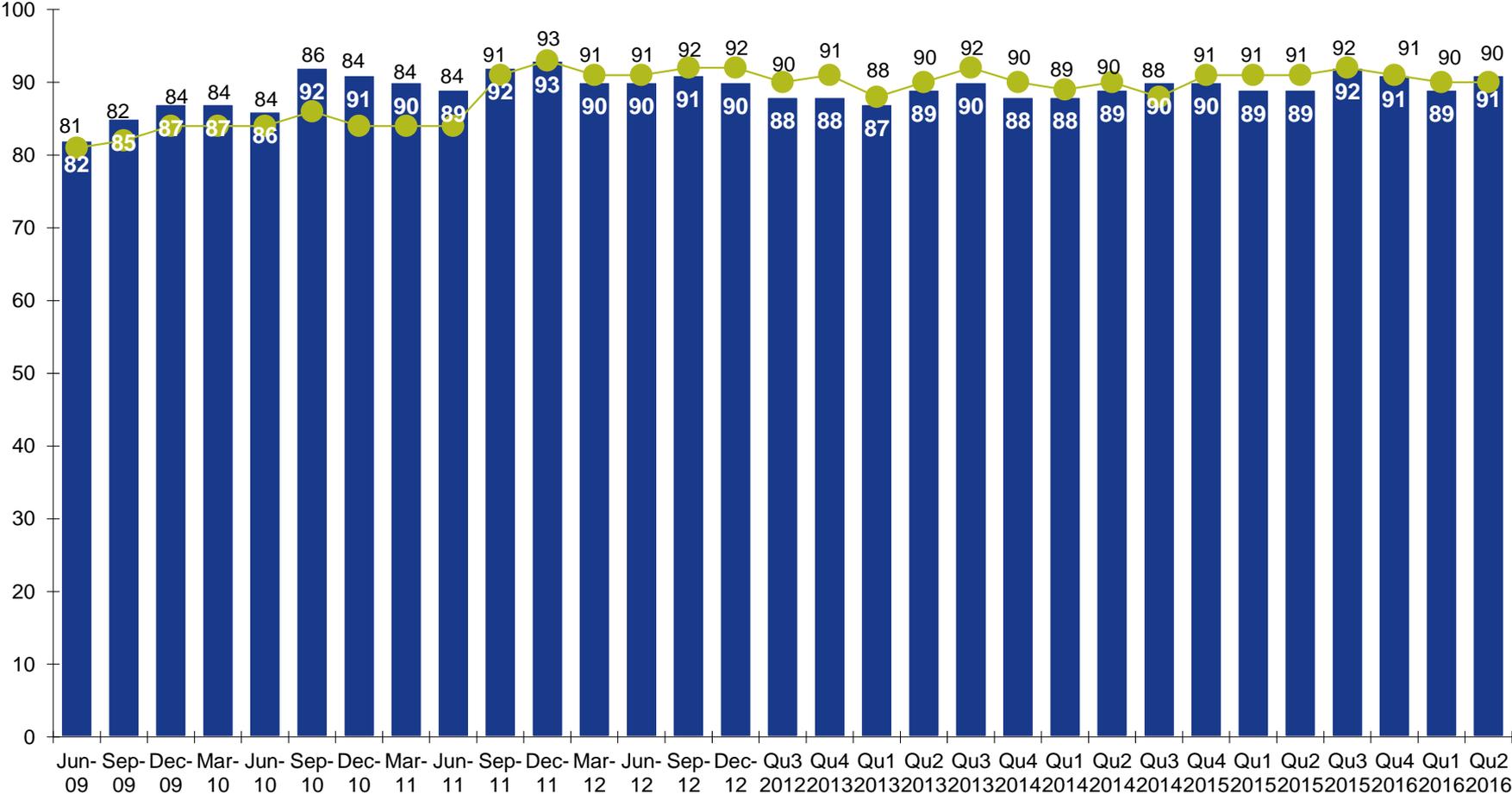
■ Tailored responses to meet business needs ● Overall satisfaction



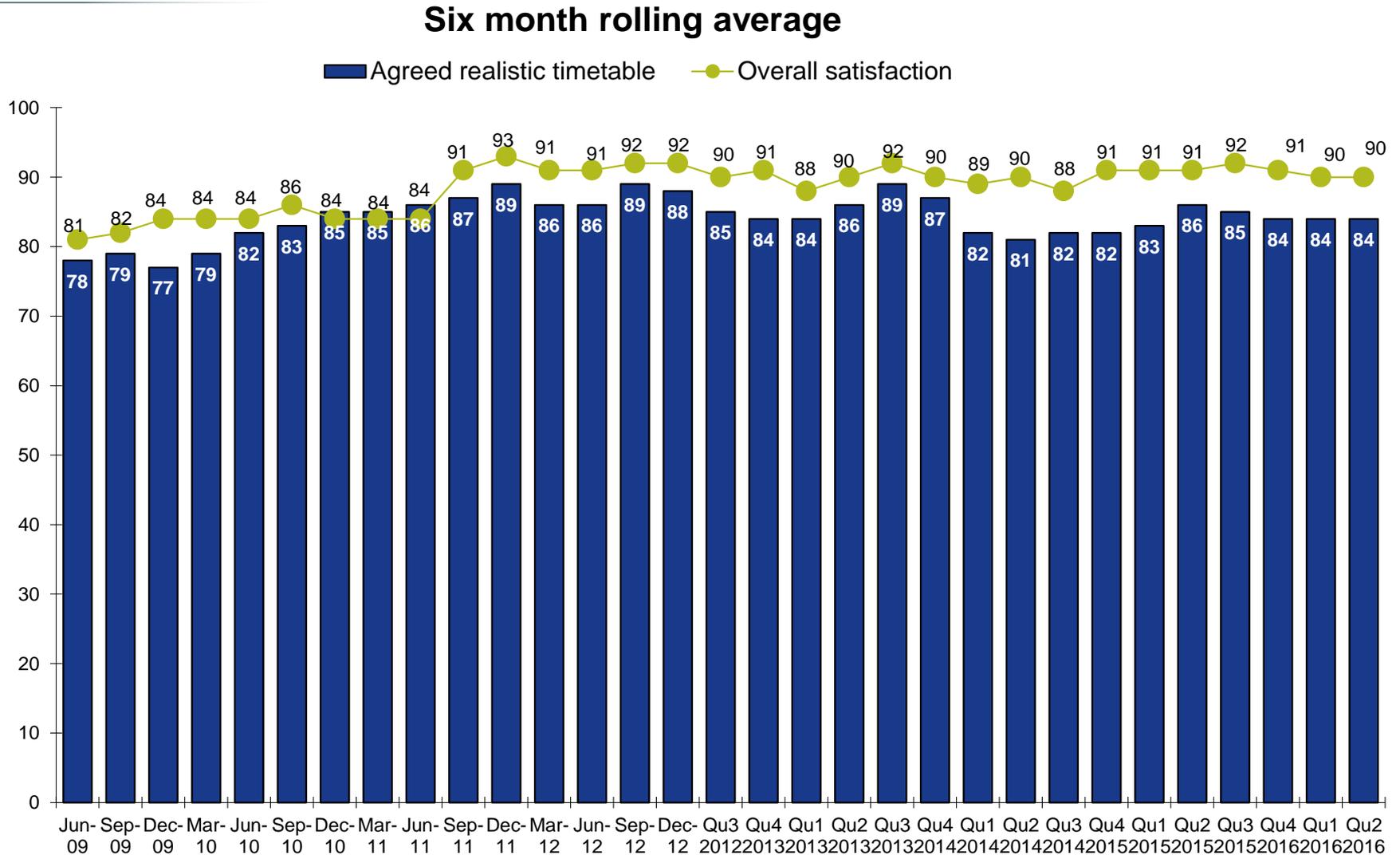
Satisfaction and key driver variables: Satisfaction with Client Executive

Six month rolling average

■ Satisfaction with Customer Executive ● Overall satisfaction

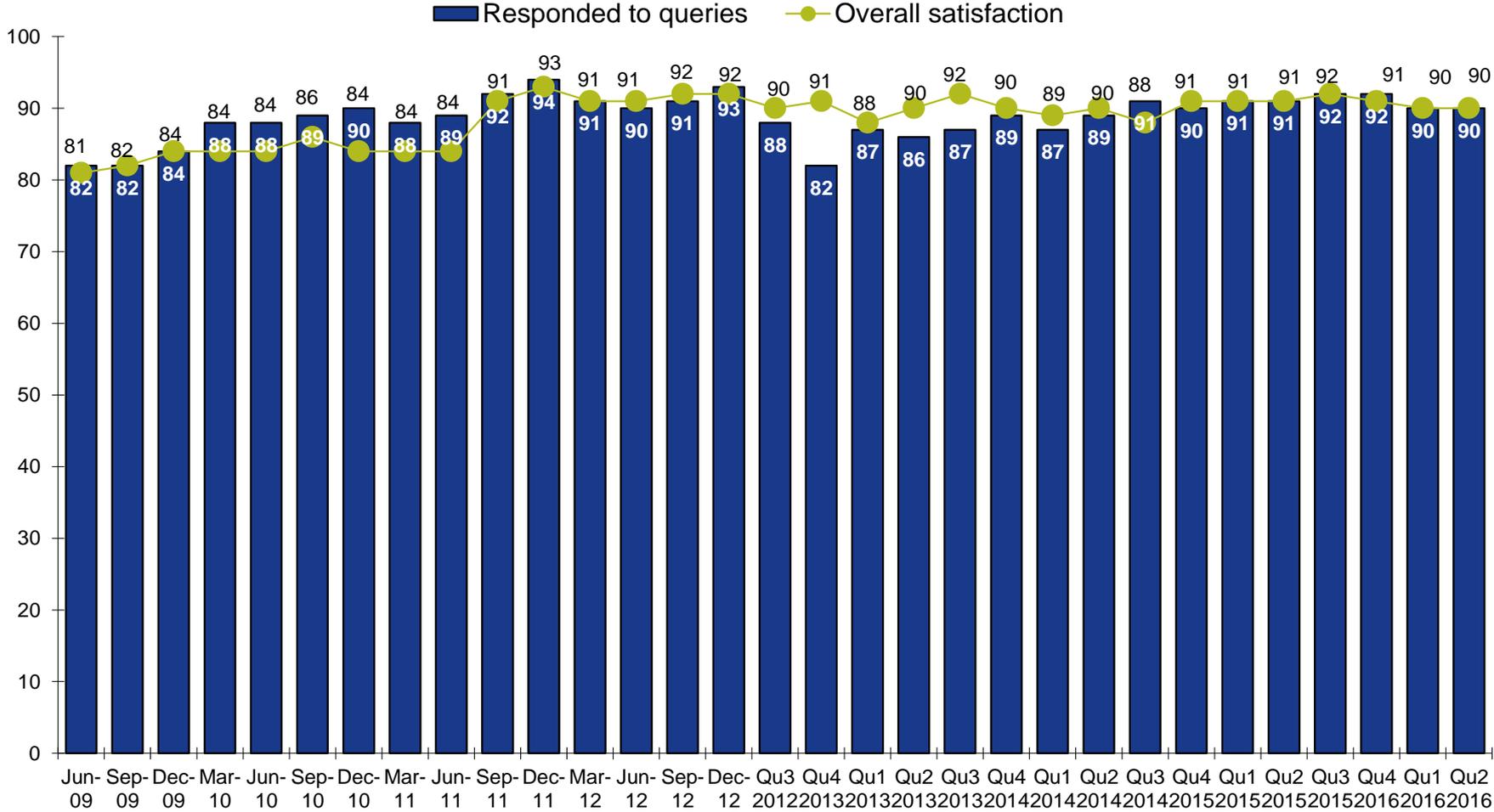


Satisfaction and key driver variables: INI discussed and agreed a realistic timetable for planned activities



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

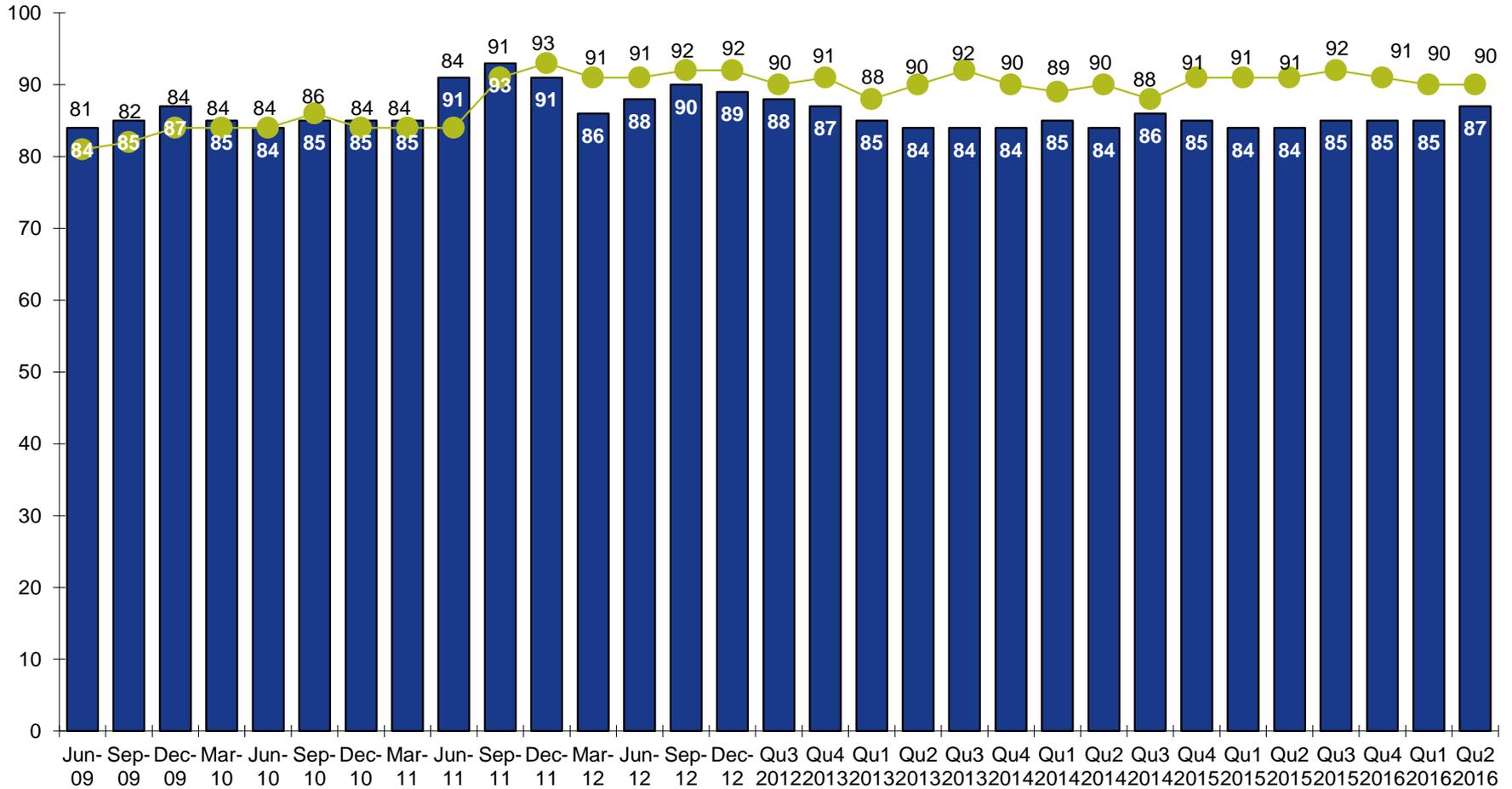
Six month rolling average



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

Six month rolling average

■ Made it clear at the start ● Overall satisfaction



DETAILED PERFORMANCE MEASURES



Performance Overall

Average Rating	
Jan-Mar '16	4.43
Apr-Jun '16	4.46
Jul-Oct '16	4.33

Customers



Process - Management



■ July-Oct

Process - Communication



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: 315 July-Oct '16]

Performance by Segment: Account Managed Customers

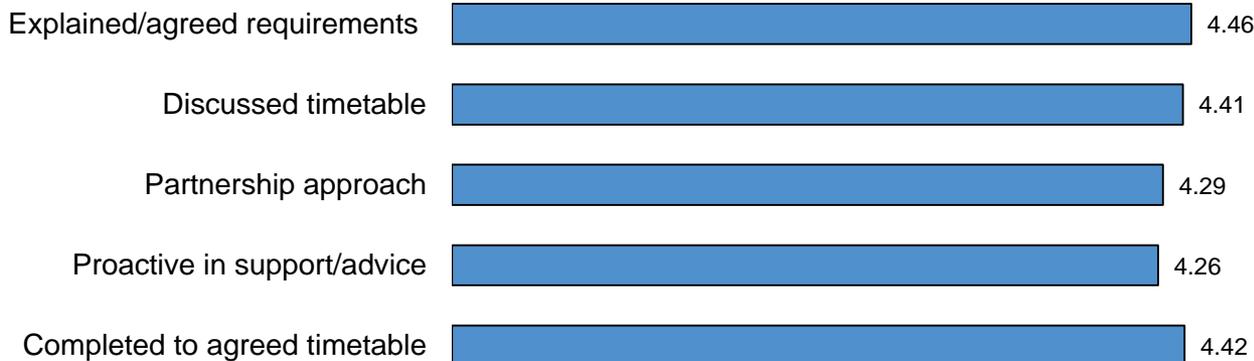
Base = 159

Average Rating	
Jan-Mar '16	4.45
Apr-Jun '16	4.58
Jul-Oct '16	4.41

Customers



Process - Management



Process - Communication



■ July-Oct

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 ...?

Performance by Segment: Regional Office Customers

Base = 109

Average Rating	
Jan-Mar '16	4.49
Apr-Jun '16	4.38
Jul-Oct '16	4.25

Customers



Process - Management



■ July-Oct

Process - Communication



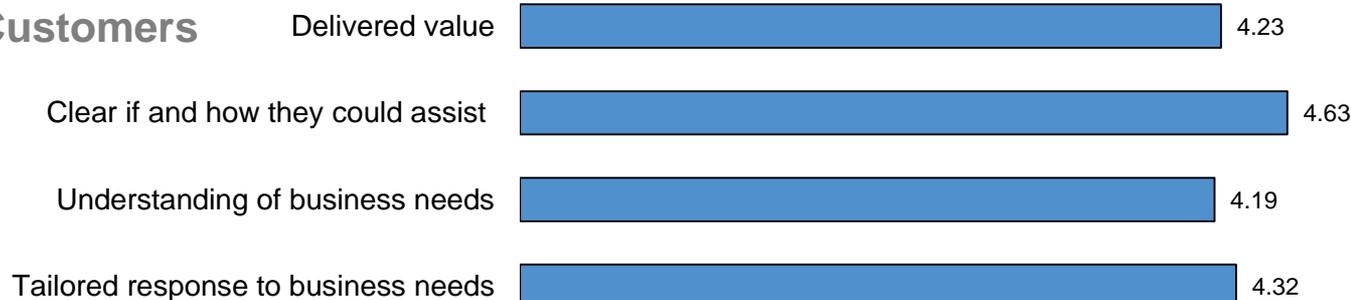
Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...?

Performance by Segment: Wider Business Base

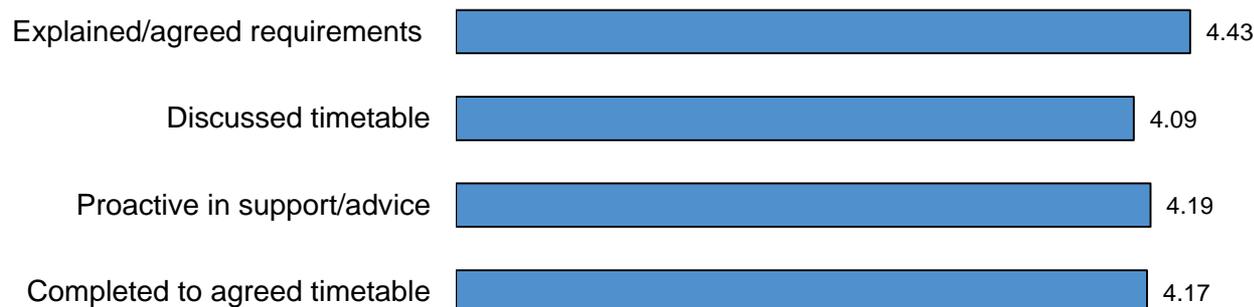
Base = 47*

Average Rating	
Jan-Mar '16	4.25
Apr-Jun '16	4.37
Jul-Oct '16	4.28

Customers



Process - Management



■ July-Oct

Process - Communication



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 ...?