

Annual Customer Satisfaction Survey

Final report prepared for Invest
Northern Ireland

29 March 2012

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1. Summary and conclusions

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1. Summary and conclusions

Methodology

750 telephone interviews were conducted with Invest NI customers between 3rd and 17th February 2012 in order to assess customers' satisfaction with the services provided. Quotas were set on customer type and division.

Key messages and recommendations

At 68% overall satisfaction is at its highest level, continuing in the positive trend that has emerged in the last number of years (68%; 64% in 2010; 62% in 2009; 61% in 2008; 59% in 2007). Meanwhile, the proportion of customers who are dissatisfied has gradually declined in recent years (9%; 12% in 2010; 15% in 2009; 21% in 2008).

Overall, six factors emerge as impacting overall satisfaction. However, three of these have much greater impact than the others. Satisfaction with the team of people, responsiveness and helping to develop customers' businesses all strongly influence overall satisfaction ratings. The application process, helping businesses develop in export markets, and helping businesses define and develop their strategy also impact overall satisfaction but to a much lesser extent.

In addition, at 61% customer advocacy has also increased in 2011, rising from 55% in 2009 and 2010. Furthermore, more customers would speak highly of Invest NI without being asked this year.

Image and associations

Many areas associated with Invest NI's image have improved in 2011. Invest NI remains strongly associated with professionalism and integrity (84% agree) and it has become more associated with playing a key role in Northern Ireland's economy (77% in 2011; 67% in 2010), offering a good range of programmes and support (67% in 2011; 61% in 2010), having knowledgeable staff (62% in 2011; 55% in 2010) and being customer focussed (59% in 2011; 52% in 2009).

In terms of Invest NI's remit, the vast majority of customers are aware that it helps businesses to develop in export markets and encourages innovation and investment in research and development.

However, a considerably smaller proportion of customers is aware that Invest NI can assist businesses in reducing costs and improving efficiencies.

Although there has been an increase in the share of customers aware of this Invest NI service, there remains scope to communicate cost saving and efficiency ideas to its customers, particularly given the continued economic downturn.

Communication and Marketing materials

Satisfaction with communication between Invest NI and its customers has increased in 2011 (70% compared to 66% in 2010). Of the 12% dissatisfied with communication, the main criticism is the lack of personal contact with Invest NI staff.

Customers remain content with key aspects of satisfaction such as speaking to the most appropriate staff member and the ease with which they can find the correct contact for their

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query. Although, customers are generally satisfied in terms of the amount and frequency with which they receive marketing materials and the quality of these publications, fewer than half (48%) feel these are relevant to their business.

Similar to 2010, satisfaction with communication is highly dependent on queries being answered by the most appropriate member of staff, the relevance of the marketing communications, the speed enquiries are dealt with and the ease with which customers can obtain information they require.

As highlighted in 2010, it is important that Invest NI continues to focus on the recurring issue of how relevant marketing material is to its customers, ensuring that, where possible, it is tailored for various customer types. This is particularly important this year, as the relevance of the marketing materials has become an even more influential driver of satisfaction with communication in 2011.

Websites

Similar to 2010, almost two thirds of Invest NI customers have accessed investni.com during 2012 (65% compared to 62% in 2010 and 69% in 2009), while the proportion of customers visiting nibusinessinfo.co.uk has increased significantly over the last year (53% compared to 46% in 2010). Additionally, 20% of customers have already visited Invest NI's latest website boostingbusiness.com.

Despite, fewer customers visiting both nibusinessinfo.co.uk and boostingbusiness.com, both are considered more useful than investni.com (67%, 60% and 55% respectively).

Reported of usage of nibusinessinfo.co.uk and boostingbusiness.com continues to be lower than that of invest.com, despite both being considered more useful. Therefore it may be beneficial to continue promoting both websites, as sources of business information in order to increase this in 2012.

Team and main contact

Satisfaction with the Invest NI team and customers' main contacts continue to be high. 73% of customers praise the Invest NI team they work with, while 81% are satisfied with their main contact.

Four in five (84%) have communicated with their main contact in the last year and after reported decreases in frequency of communication since 2008 (40% in 2008; 33% in 2009; 28% in 2010), 39% of customers say they are now communicating with Invest NI on a monthly basis.

How responsive the main contact is, the clarity with which the main contact explains if and how Invest NI can assist, ease of contact and their knowledge of customers' businesses all impact how satisfied customers are with their main contact. In 2011, Invest NI has performed strongly in all of these areas.

Suggestions to improve communication with the main contact focus on increasing contact further, being more proactive and generally being more helpful. Therefore, in order to increase satisfaction with this aspect during 2012, it would be beneficial to maintain the current frequency of contact reported by customers and, if feasible, increase how often all customers are contacted.

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Invest NI programmes and advisory services

Three in five customers (59%) are satisfied with the programmes and advisory services offered by Invest NI; an increase from 53% in 2010. Similar to 2009 and 2010, satisfaction with programmes and advisory services varies considerably depending on whether or not Invest NI customers participated in or used a programme or service.

As was reported in 2010, the Invest NI advisor's ability to make proactive suggestions is the main driver of satisfaction with programmes and advisory services offered. Other factors which influence satisfaction with programmes and advisory services, but to a lesser extent, are responsiveness of the Invest NI advisor, knowledge about their business specialism, and interest in and knowledge of the customer's business.

After a decrease in 2010, there has been a marginal increase in participation levels of programmes and advisory services this year. In addition, satisfaction with several programmes has increased in 2011. In terms of individual programmes, 'Grants for R&D' and 'Support for Market Visits' remain the best known and most commonly used. As previously mentioned, satisfaction with Invest NI's programmes is very high in 2011 and although the 'Property Assistance Programme' is the least well known and least popular programme, satisfaction with it has increased substantially from 44% in 2010 to 78%.

Potentially, a combination of both an increase in participation and satisfaction with specific programmes could potentially explain the rise in overall satisfaction with programmes and services this year.

The challenge for Invest NI in 2012 will be to increase awareness of some of the lesser known programmes, encourage participation in these, while trying to sustain the levels of satisfaction reached in 2011.

Similar to 2010, 82% of customers are satisfied with the advice they received from Invest NI (82% in 2010).

Focusing on specific advisory services, Trade and Marketing Advisors (84%) is best known by a long way. Other services that are well known include Innovation Vouchers (75%), ICT advice (70%), the Business Information Service (67%) and the Business Health Check (61%). These services are also most popular with Invest NI customers.

The Property Search and Advice service continues to be the least well known (29% have heard of it) compared to 30% in 2010.

Financial assistance and claims' process

The process of seeking and claiming financial assistance from Invest NI has improved in 2011. Just over half (55%) sought funding in 2011, an increase of five percentage points from 2010. Of these 68% are satisfied with the application process and 62% are content with the time taken to approve their application, which has increased from 57% in 2010.

The preliminary advice visit continues to be rated the strongest performing area of the financial assistance process. In addition, there has been an increase in the proportion of customers satisfied with the length of time taken between the initial visit and the submission of the claims' form and that their claim was processed within 30 days.

Given the increases in the various aspects of the claims' process this year, it would be important to continue with the measures Invest NI have implemented during the last year, in order to retain or increase satisfaction in this area.

2. Methodology

2. Methodology

2.1. Methodology

750 telephone interviews were conducted with Invest NI customers between 3rd and 17th February 2012 in order to assess customers' satisfaction with the services provided by Invest NI. To ensure representativeness quotas were placed on customer type and division as outlined below:

Division	% in universe	% of sample	Achieved sample
Engineering & Business Services	8	7	54
Transport & Construction	14	12	90
International Investment	3	2	15
Life Sciences and Creative	10	9	66
Food	14	13	98
Regional Office Network	52	57	427
Customer type	% in universe	% of sample	Achieved sample
Strategic & Impact	7	7	51
Development	31	28	212
Entry	40	39	294
Managed	22	26	193
Total	100	100	750

Key Driver Analysis (KDA) was conducted to evaluate the impact of Invest NI's performance with regard to various aspects of customers' satisfaction with

- Invest NI overall;
- communication between customers and Invest NI;
- the main contact within Invest NI;

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- the advisor.

Comparisons with the annual survey in 2010 are made where possible.

The questionnaire is appended to this document.

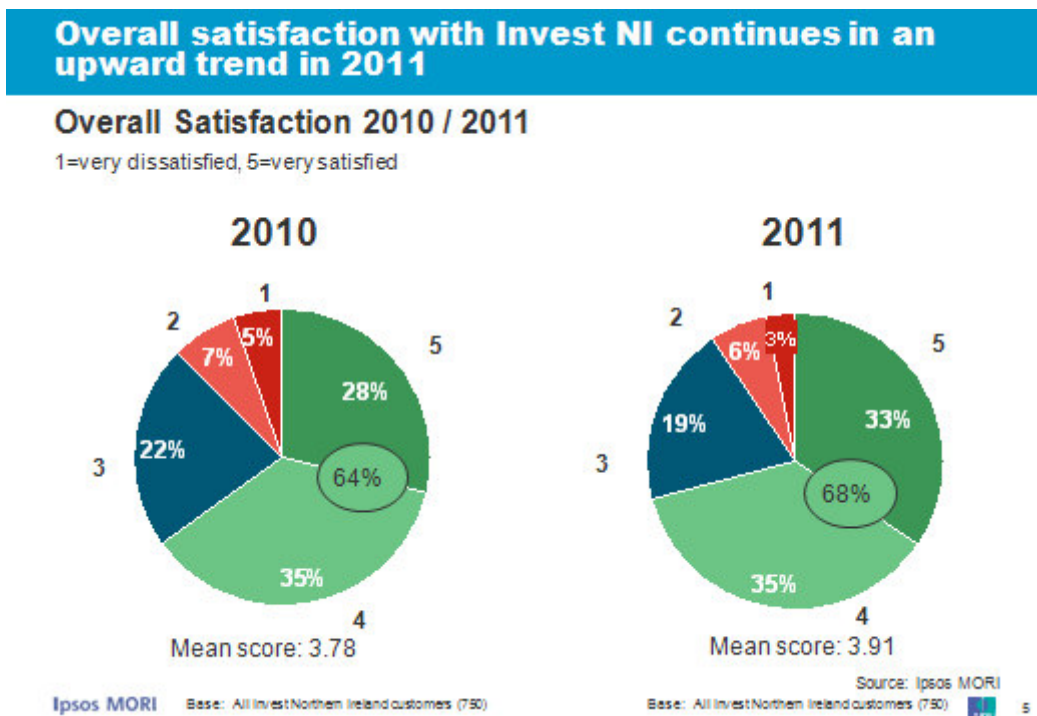
3. Key findings

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3.1. Overall satisfaction, advocacy and familiarity

Overall satisfaction remains at a high level in 2011; 68% of customers are very or quite satisfied with the service they have received from Invest NI during the past 12 months. This year the positive trend of steady year-on-year increases with overall satisfaction has continued (59% satisfied in 2007; 61% in 2008; 62% in 2009; 64% in 2010). In addition, the proportion of customers who are dissatisfied is also decreasing each year (21% in 2008; 15% in 2009 and 12% in 2010; 9% in 2011).

Customers involved with the Life Science and Creative division are most satisfied with the service they received in 2011 (85% compared to 73% in 2010). Meanwhile, Engineering and Business Service and Managed customers are least satisfied (63% and 52% respectively).



In contrast to 2010, six areas of Invest NI’s service are having an impact on overall satisfaction ratings. Satisfaction with the team of people, responsiveness and helping to develop customers’ businesses have the greatest impact on overall satisfaction, while the application process, helping businesses develop in export markets, and helping businesses define and develop their strategy also influence satisfaction but not to the same extent.

However in 2010 the key areas driving overall satisfaction were how responsive Invest NI staff are to customers’ business needs, the team of people the customer liaises with, satisfaction with communication between the customer and Invest NI, the organisation’s professionalism and integrity and the ease of completing the claims form.

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As would be expected, customers feel they know the organisation well. Nine in ten know at least a fair amount about it (90%), with 9% admitting they know just a little.

Advocacy has increased considerably since 2010, rising from 55% to 61%. Interestingly, a larger proportion of customers would speak highly without prompting in 2011, increasing from 21% to 26%. A similar proportion of customers would be critical of Invest NI this year (14%; 15% in 2011).

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3.2. Image and associations

In 2011, it is clear that customers' perceptions of and associations with Invest NI have improved, with increases in the proportion of customers agreeing with the image statements presented.

With regard to how Invest NI is perceived among its customer base, the vast majority agrees that it acts with professionalism and integrity (84%); Development customers are most likely to agree with this (91%), while Managed customers are much less likely to agree (73%).

Customers also believe that Invest NI has a key role to play in the success of the local economy (77%) and agreement with this has increased ten percentage points from 2010.

Two thirds of customers (67%) agree that Invest NI offers a good range of programmes and support, while a sizeable proportion consider staff to be knowledgeable and bring expertise (62%). Invest NI is perceived to be more customer focused this year and are more likely to be associated with helping to develop customers' businesses.

In 2011, just two in five (40%) agrees that Invest NI has responded effectively to the economic downturn, with one in five (21%) disagreeing with this statement. Larger proportions of customers who have consulted with the Engineering and Business Services and Life Sciences and Creative divisions are more likely to agree that Invest NI has responded well to the downturn (50% and 55% respectively), while Regional Office Network customers are most likely to disagree that there has been an effective response to the recession (23%).

In 2011, Invest NI is strongly associated with professionalism and integrity and playing a key role in the success of the economy...

Image dimensions (1 of 2)

Invest NI ...	Mean score Scale 1 (strongly disagree) to 5 (strongly agree)	% agree	% disagree
...acts with professionalism and integrity	(4.19*) 4.27	84% (82%*)	5% (6%*)
...has a key role to play in the success of the NI economy	(3.87*) 4.12	77% (67%*)	10% (13%*)
...offers a good range of programmes and support	(3.72*) 3.86	67% (61%*)	11% (12%*)
...staff are knowledgeable and bring expertise	(3.53*) 3.70	62% (55%*)	15% (17%*)
...is a customer focused organisation	(3.52*) 3.66	61% (53%*)	15% (17%*)
...is helping to develop your business	(3.43*) 3.59	59% (52%*)	21% (17%*)
...is responsive to your business needs	(3.34*) 3.54	57% (49%*)	20% (24%*)

Base: All Invest Northern Ireland customers (750); * 2010 figures.
Ipsos MORI

Source: Ipsos MORI



...but is much less associated with creativity and challenging customers' business plans

Image dimensions (2 of 2) ...is responsive to your business needs

Invest NI ...	Mean score Scale 1 (strongly disagree) to 5 (strongly agree)	% agree	% disagree
...is adding value to your business	(3.36*) 3.52	56% (50%*)	21% (25%*)
...offers appropriate solutions for you business	(3.29*) 3.42	50% (49%*)	21% (24%*)
...is an important contributor to the success of your business	(3.16*) 3.30	49% (43%*)	28% (31%*)
...responded effectively to the economic downturn	3.27	40%	21%
...provides a robust challenge to your business plan	(3.07*) 3.16	37% (36%*)	26% (30%*)
...uses creativity and imagination to help you grow	(3.03*) 3.15	38% (35%*)	26% (29%*)

Base: All Invest Northern Ireland customers (750); * 2010 figures.
Ipsos MORI

Source: Ipsos MORI
Ipsos 14

Source: Ipsos MORI

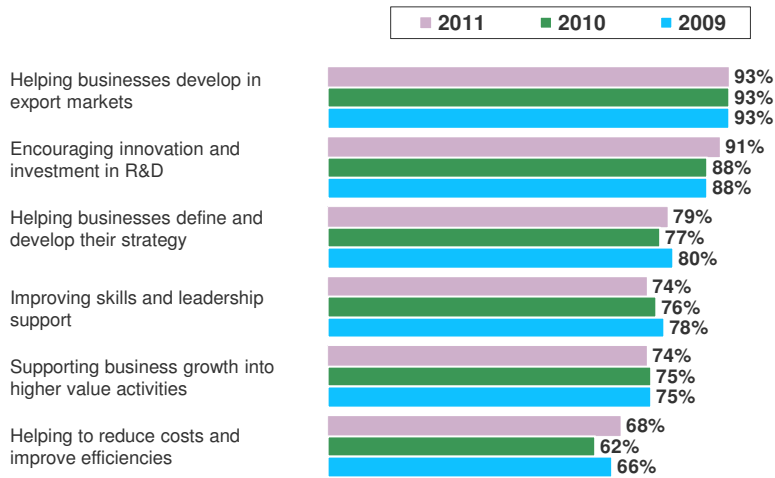
Perceptions of Invest NI's remit remain unchanged in 2011. The overwhelming majority of customers are aware that Invest NI helps businesses develop in export markets (93%; 93% in both 2010 and 2009). The vast majority also knows that it encourages innovation and investment in research and development (91% compared to 88% in 2010 and 2009).

A large proportion of customers recognise that Invest NI can help businesses define and develop their strategies, while three quarters (74%) are aware that it can assist in improving skills and provide leadership support and can support businesses to grow into higher value activities.

Invest NI is less associated with helping businesses reduce their costs and improve efficiencies (68%), although the proportion of customers recognising that this is part of Invest NI's remit has increased from 2010 (62%).

Similar to both 2010 and 2009, Invest NI is most commonly associated with helping businesses in export markets and R&D

Areas businesses believe Invest NI is involved in



Base: All Invest Northern Ireland customers (750).
Ipsos MORI

Source: Ipsos MORI
Ipsos 11

Invest NI is perceived to perform particularly well in two of these areas; helping businesses develop in export markets (69%) and encouraging innovation and investment in research and development (68%).

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3.3. Communication

Overall, seven in ten (70%) are satisfied with the communication they have had with Invest NI throughout the last 12 months; an increase from 2010 (66%). Customers of the Life Sciences and Creative division (76%) are most satisfied with Invest NI’s communication, while Regional Office Network customers are least satisfied (67%).

With regard to specific aspects of Invest NI’s communication, customers are content that the most appropriate member of staff answers their queries and satisfaction with this aspect has increased steadily from 2009 (73% in 2011; 71% in 2010; 69% in 2009).

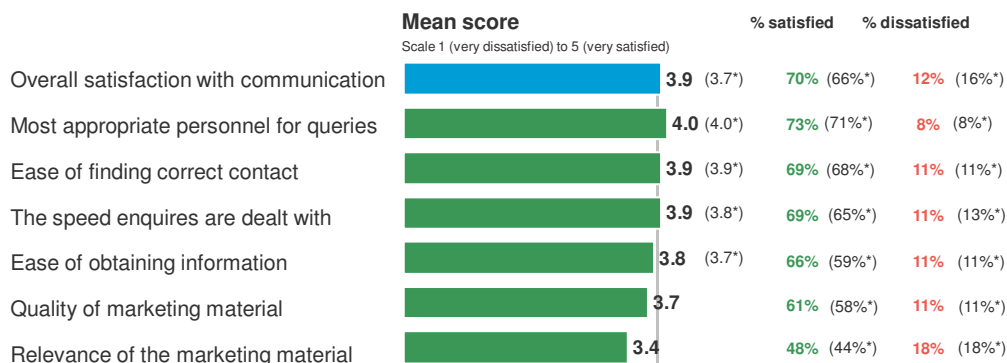
Similar proportions of customers find it easy to speak to the required staff member and praise the speed with which their queries are dealt with (69% for both aspects).

Satisfaction with Invest NI’s marketing materials is substantially lower than other aspects of communication. Although, these materials are considered to be high quality (61%), they are not necessarily relevant to customers’ businesses (48%).

In 2011, four factors drive overall satisfaction with communication; namely queries dealt with by the correct person is the main driver, satisfaction with the relevance of marketing material, the speed with which queries are dealt with, and the ease of obtaining required information. These key drivers of overall satisfaction have remained broadly similar to 2010.

Only half of Invest NI’s customers (48%) are satisfied with the relevance of its marketing material

Satisfaction with communication aspects



Base: All Invest Northern Ireland customers (750); * 2010 figures.
Ipsos MORI

Source: Ipsos MORI
Ipsos 22

Those who are dissatisfied with Invest NI’s communication cited a variety of reasons to explain this. The main criticism stems from infrequent contact with customers (55%) and this has increased five percentage points from 2010. More specifically, customers feel there is a lack of personal contact (18%) and response to queries can be slow (18%).

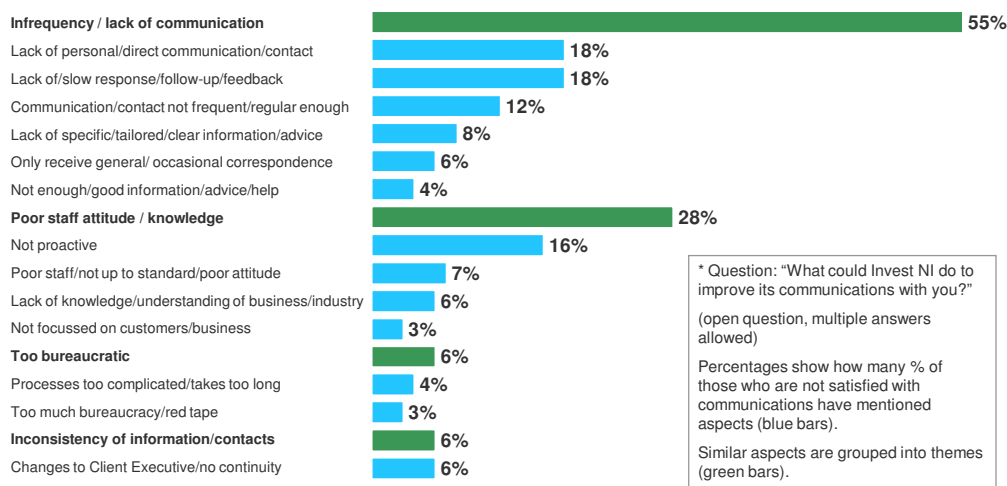
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A lack of frequent communication appears to be a particular issue for Life Sciences and Creative division customers and those involved with the Regional Office Network (60% for both divisions).

Over a quarter of those dissatisfied with communication believe that staff attitude and knowledge could be improved (28% increasing from 16% in 2010). In particular, customers feel that staff could be more proactive than they currently are (16%).

Lack of frequent contact with customers is the main reason for dissatisfaction with communication

Reasons for dissatisfaction with communication*



* Question: "What could Invest NI do to improve its communications with you?" (open question, multiple answers allowed)
 Percentages show how many % of those who are not satisfied with communications have mentioned aspects (blue bars).
 Similar aspects are grouped into themes (green bars).

Base: All who are neutral/dissatisfied with communications (216)

Source: Ipsos MORI

Ipsos MORI

Ipsos 21

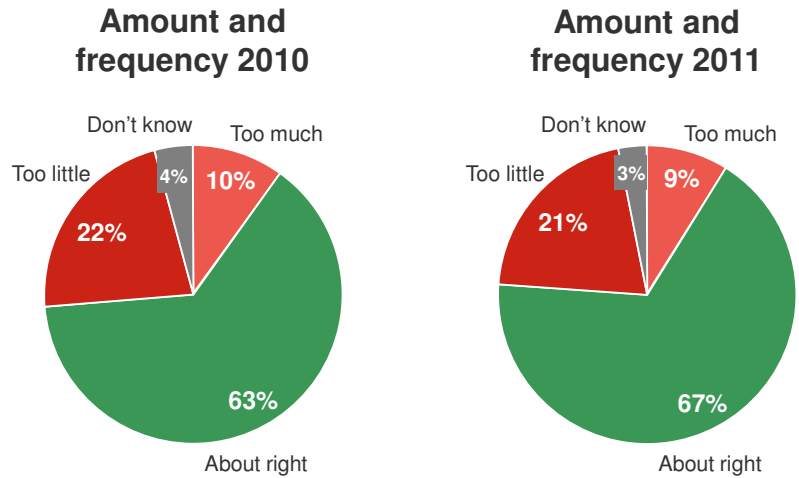
Marketing materials

Two thirds of customers (67%) are content with the amount and frequency of the marketing materials they receive from Invest NI compared to 63% in 2010. However, a sizeable proportion still claims that they do not receive enough.

As previously mentioned, marketing materials are considered high quality by many customers (61% satisfied). However, although the proportion of customers rating marketing materials as relevant has increased in 2011, satisfaction with this remains relatively low and therefore it would be important to review the material that has been distributed to customers during the previous twelve months to establish whether this could be tailored further.

Two thirds are content with the amount and frequency of marketing material

Amount and frequency of receiving marketing material



Base: All Invest NI customers (750)

Ipsos MORI

Source: Ipsos MORI

Ipsos 23

investni.com, nibusinessinfo.co.uk and boostingbusiness.com

Both investni.com and nibusinessinfo.co.uk are clearly well used among Invest NI’s customer base. Almost two thirds (65%) have logged onto invest.com in the past 12 months, while 53% visited nibusinessinfo.co.uk. In addition, one in five (20%) have visited Invest NI’s latest website boostingbusiness.com.

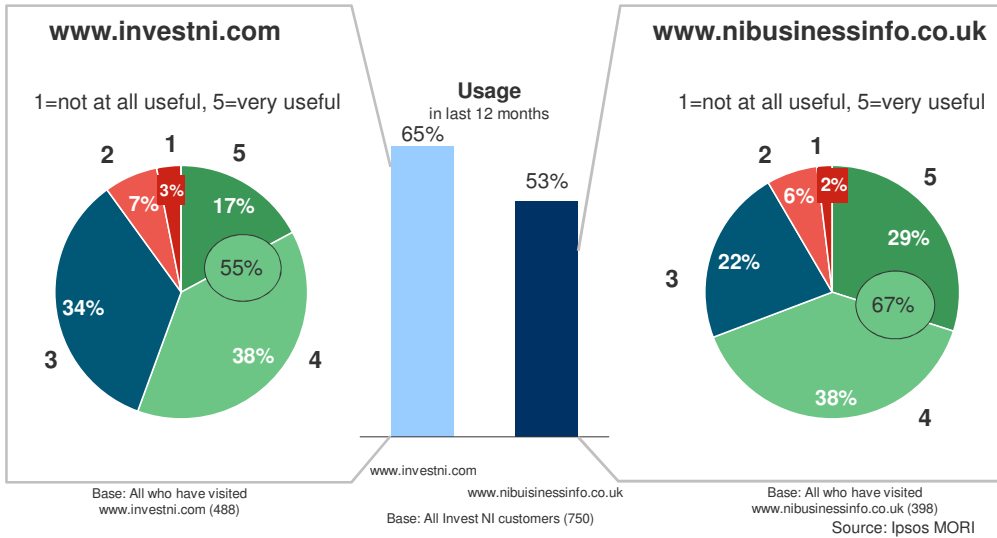
Usage of investni.com has remained relatively consistent with 2010, however, visitation to nibusinessinfo.co.uk has risen significantly over the last year, increasing from 46% to 53% this year.

Interestingly, the perceived usefulness of each website has increased for both investni.com and nibusinessinfo.co.uk in 2011. This year, 55% of those who have accessed investni.com rate it as useful compared to 50% in 2010, while 67% of those who visited nibusinessinfo.co.uk in the last 12 months rate it as useful versus 59% in 2010.

With regard to boostingbusiness.com, three in five (60%) who visited it consider it useful.

Similar to 2010, investni.com is the more commonly used website, while nibusinessinfo.co.uk is perceived to be more useful

2011 Usage and ratings of websites



Ipsos MORI

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3.4. Team and main contact

Satisfaction with the Invest NI team has increased significantly over the last two years. In 2009, 68% of customers were satisfied with the team they were liaising with which increased to 70% in 2010 and 73% in 2011. A similar proportion remains dissatisfied with the Invest NI team (8%).

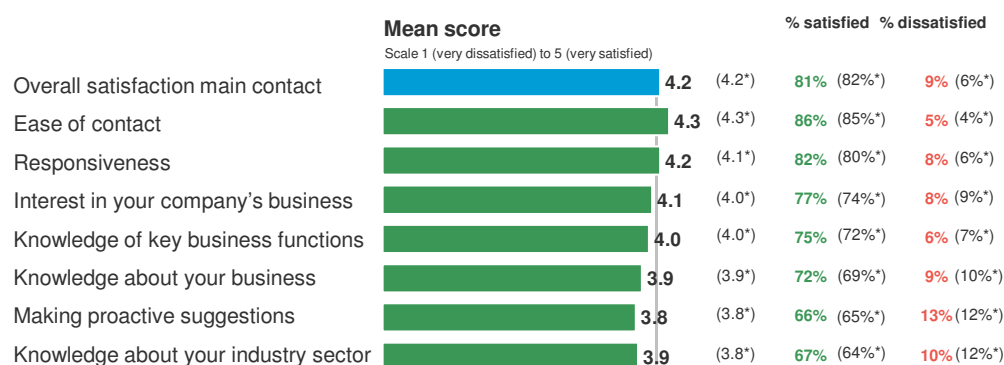
With regard to the customer’s main contact, satisfaction remains consistently high in 2011 (81%), after having increased substantially between 2009 and 2010 (75% to 82%).

In terms of specific areas of performance, all ratings remain at a very high level. Main contacts are generally easy to contact (86%) and responsive to customers (82%), while three quarters feel that their main contact is interested in their business (77%) and has a good understanding of key business functions (75%).

In 2011, by far the main driver of satisfaction with communication is responsiveness of the main contact, followed by making it clear at the outset if and how Invest NI could assist the customer’s business, ease of contact and knowledge about the customer’s business.

Main customer contacts are easy to speak to and are generally responsive. However, there is potentially scope to improve industry knowledge and proactivity

Satisfaction with aspects regarding main contact



Base: All who have had direct liaison with the company’s main contact within INI (631); * 2010 figures
Ipsos MORI

Source: Ipsos MORI 34

In addition, the majority of customers say that their main contact made it clear from the outset if and how Invest NI could assist them (80%), while 74% say that their main contact discusses and agrees realistic timescales for planned activities.

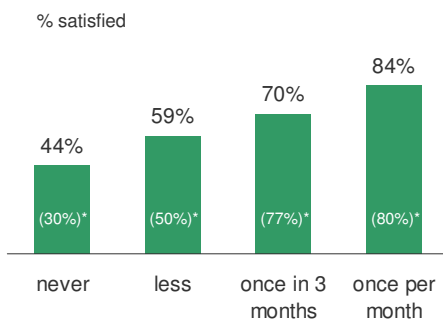
Among those dissatisfied with their main contact, over a quarter feel that their communication needs to improve.

As has been the trend in previous waves of this research, a strong relationship exists between frequency of contact and overall satisfaction and satisfaction with the team of people. Customers who have regular contact with Invest NI i.e. at least once every three months and/or are satisfied with the Invest NI team report substantially higher levels of overall satisfaction.

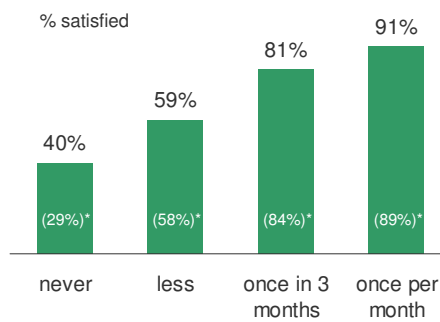
Customers who have been contacted by Invest NI at least once every three months report considerably higher levels of satisfaction

Customer satisfaction by contact intensity

Overall satisfaction with Invest NI by frequency of contact with main contact



Satisfaction with team of people by frequency of contact with main contact

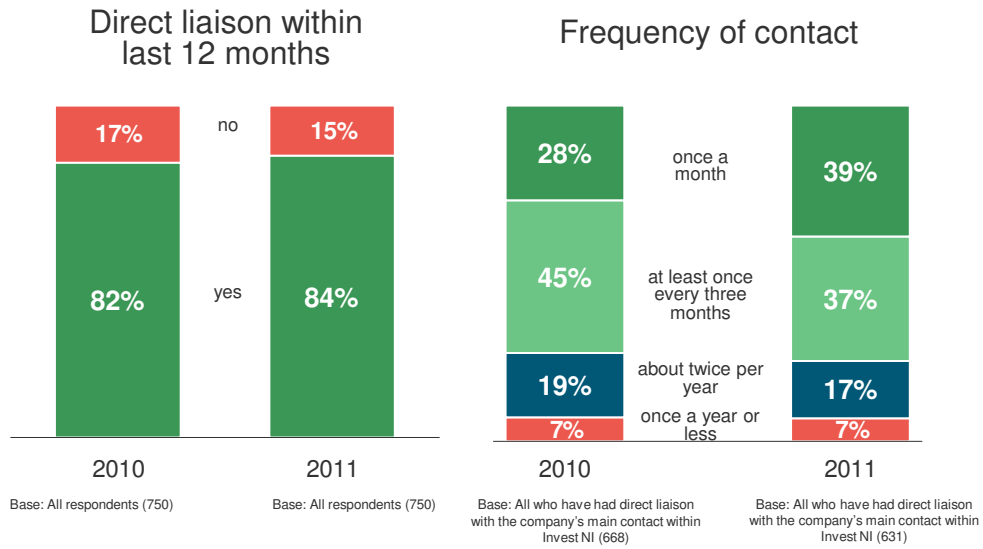


Base: All Invest Northern Ireland customers (750); *2010 figures
Ipsos MORI


Source: Ipsos MORI Ipsos 33

In previous years there had been a sharp decline in the frequency of contact between Invest NI and customers. In 2008, 40% of customers had monthly contact with Invest NI, however, this fell to 33% in 2009 and 28% in 2010. In 2011, frequency of contact appears to have returned to similar levels to those experienced in 2008, and 39% of customers now say that Invest NI is in contact at least once a month.

Frequency of contact with main executive has increased since 2010.



Ipsos MORI

Source: Ipsos MORI  31

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3.5. Invest NI Programmes and Advisory Services

63% took part in at least one programme during 2011, while 70% of customers used at least one advisory service. Participation and usage of both have increased from 2010, after having declined considerably from 2009 (59% and 63% respectively).

Having decreased between 2009 and 2010, satisfaction with the quality of programmes and advisory services has increased to levels previously witnessed in 2009 (59% in 2011; 53% in 2010; 59% in 2009).

As may be expected, there are considerable differences in levels of satisfaction with programmes and advisory services depending on whether or not Invest NI customers participated in or used either. Amongst those who participated in a programme, 67% are very/quite satisfied with the quality of programmes on offer. This drops to 47% amongst those who haven't participated. In addition, there is also a considerable difference in satisfaction depending on whether a customer has used an advisory service; 66% of those who have compared to 43% of those who haven't.

3.5.1. Programmes

In 2011, the average number of programmes that each Invest NI customer participated in has increased marginally to 1.3, compared to 1.1 and 1.57 in 2009. Customers of the Engineering and Business Services division and Strategic, Impact and Development customers have participated in more programmes, on average, than other customers.

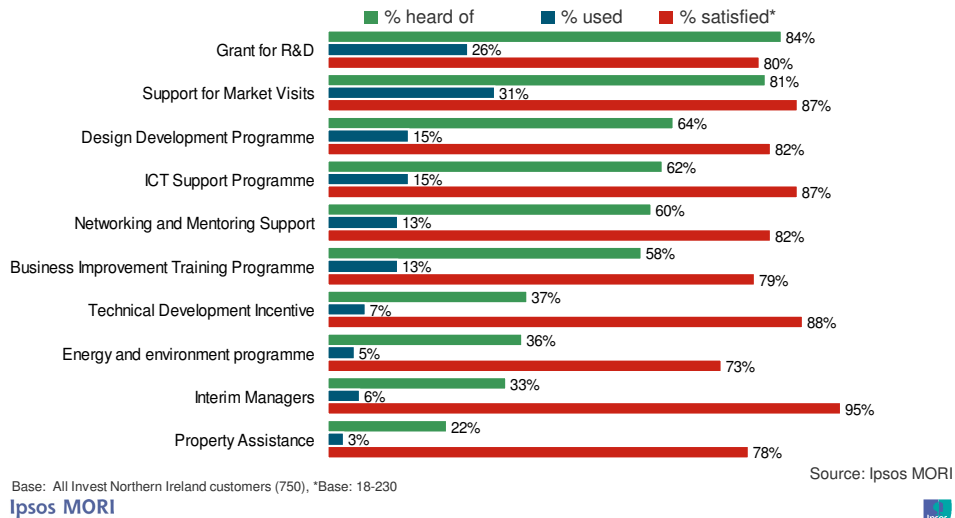
Awareness of Invest NI's most popular programmes increased in 2011. 84% of customers have now heard of '*Grants for Research and Development*', compared to 72% of customers in 2010. Meanwhile, awareness of '*Support for Market Visits*' continues to be high (81%). In addition, customers are much more likely to have participated in these programmes.

Satisfaction with the majority of individual programmes remains high in 2011, with some ratings having increased since 2010. Notable increases are apparent with the '*Interim Managers Programme*' with satisfaction rising from 82% to 95% this year, the '*Technical Development Incentive Programme*' increasing from 82% to 88%, and the '*Business Improvement Training Programme*' rising from 71% to 79%.

Despite being one of the least popular programmes, satisfaction with the '*Property Assistance Programme*' recorded an overwhelming increase this year, moving from 44% in 2010 to 78% in 2011.

Although awareness of some programmes is low, satisfaction is very high across all Invest NI programmes

2011 awareness of, usage of and satisfaction with programmes



3.5.2. Advisory services

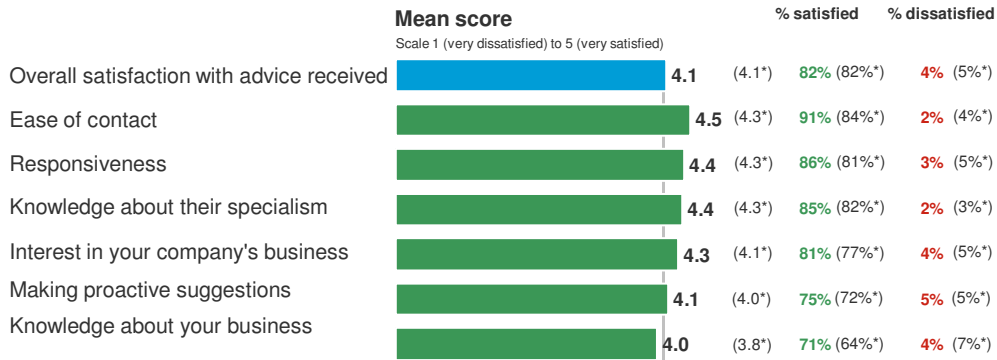
In a similar picture to 2010, the vast majority of customers (82%) who have used an advisory service are satisfied with the advice they receive with only 4% dissatisfied.

In terms of the strongest areas of the advisor’s performance, many of these have improved in 2011. An overwhelming majority are satisfied at how easily advisors can be contacted (91% compared to 84% in 2010) and how responsive advisors are (86% compared to 81% in 2010). Customers have also been more impressed with the advisor’s knowledge about their businesses in 2011, having increased from 64% to 71%.

The advisor’s ability to make proactive suggestions to customers is a key driver of satisfaction with the advice received. How responsive the advisor is, their knowledge about the customer’s business specialism, level of interest shown in and knowledge about customer’s businesses also impact how satisfied customers will be with advice they received.

Invest NI customers are very favourable towards advisors across all aspects of service

Satisfaction with aspects regarding Invest NI advisor



Base: All Invest Northern Ireland customers who have used an advisory service (366).
Ipsos MORI

Source: Ipsos MORI  44

There are considerable differences in awareness of Invest NI’s advisory services. Trade and Marketing advice is, by far, the most well known with 84% of customers having heard of this. This is followed by Innovation Advisors (75%), ICT advice (70%), Business Information Service (67%) and the Business Health Check (61%).

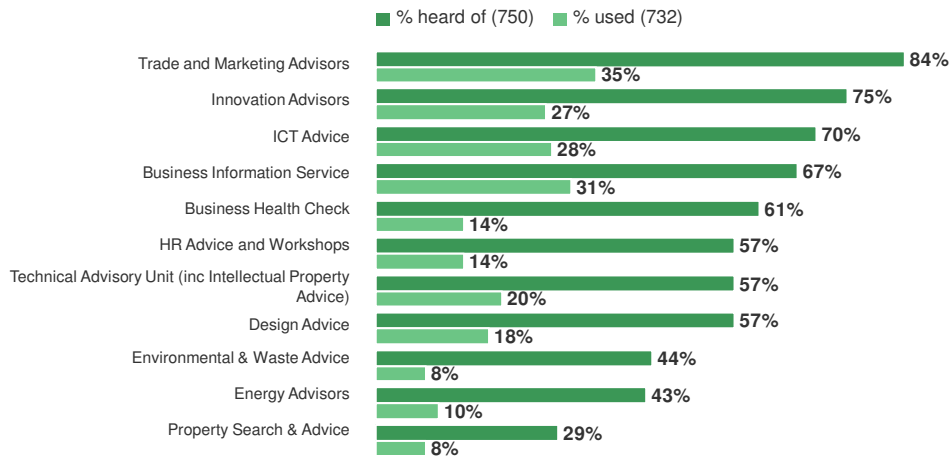
Property Search and Advice is the least well known, with just under a third (29%) saying they have heard of this particular service.

With regard to the most commonly used services, Trade and Marketing Advisors remains the most popular service this year (35%; 30% in 2010), followed by the Business Information Service (31%; 27% in 2010), ICT Advice (28%) and Innovation Advisors (27%).

Despite awareness being relatively high, the Environmental and Waste Advice Service and the Property Search and Advice Service are the least popular (8% have used each).

Trade and Marketing Advisory services are best known and most used

Awareness and usage of advisory services 2011



Base in brackets
Ipsos MORI

Source: Ipsos MORI



Source: Ipsos MORI

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3.6 Financial assistance and claims process

Seeking financial assistance

There has been an increase in the proportion of customers seeking financial assistance in the last 12 months. 55% have sought assistance in 2011, compared to 50% in 2010.

Generally customers are satisfied with the process, especially in terms of applying for a grant (68%) and the time taken to approve the funding application (62%).

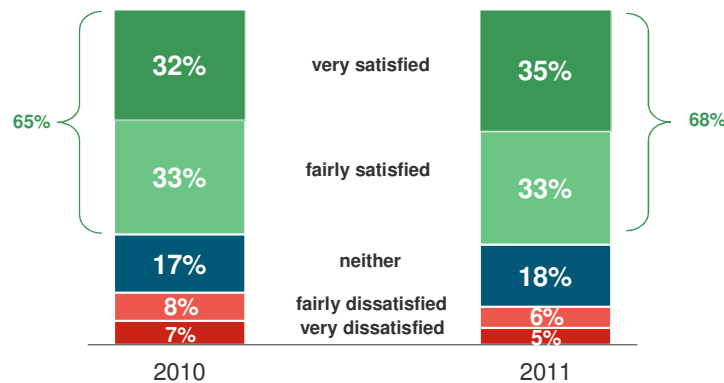
Previously, there had been a decrease in satisfaction with approval time; however, in 2011 this has increased from 57% to 62%.

Similar to previous waves, those receiving less than £100,000 in assistance are more likely to rate the application process better than those receiving more than £100,000. This could potentially be attributed to the length of time it takes for grant approval. Despite satisfaction with the application process having improved over the last year, customer applying for grants in excess of £100,000 are much less satisfied than those applying for financial assistance under £100,000 (48% compared to 65%).

Furthermore and perhaps not surprising, the application process is higher rated among customers whose application was successful (75% compared to 24% whose application was rejected).

Satisfaction with the application process remains similar to 2010...

Satisfaction with application process



Base: All who have sought financial assistance in the past 12 months (412)

Source: Ipsos MORI

Ipsos MORI

Ipsos 30

Half of customers (51%) proceeded to claim funding from Invest NI in 2011. Among those who have claimed funding from Invest NI, the strongest performing area is the preliminary visit by Invest NI (76% in 2011; 76% in 2010; 78% in 2009).

Other key areas of the claims' process have seen significant increases in satisfaction this year. Almost two thirds (65%) found the claims' schedule form easy to complete (61% in

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2010), two thirds (67%) are content with the length of time taken from the initial advice visit to the submission of the claims' form (61% in 2010), and over two thirds (69%) believe that their claim was processed within 30 days after claim submission (62% in 2010).,

Those receiving less than £100,000 in financial assistance record considerably higher levels of satisfaction at all stage of the claims' process.

Communication between the customer and the Invest NI claims' team is also very high in 2011 (76%).

Appendix

Appendix

11-019760 Invest NI Annual Customer Satisfaction Survey

Introduction and screener

Good morning/afternoon/evening. My name is from Ipsos MORI, the research organisation. Could I speak to

Ipsos MORI has been commissioned by Invest Northern Ireland (Invest NI) to conduct an independent study to monitor customer's satisfaction with its performance in order to make improvements. You should have received a letter from Invest NI about the survey already [OFFER TO RESEND IF NECESSARY. FAX/EMAIL COPY AVAILABLE]

Invest NI are interested in understanding how their customers view the organisation and what they think about it's activities and services.

This survey will take about 20 minutes to complete. Is now a good time to speak? [IF NOT, OFFER TO RE-ARRANGE FOR MORE CONVENIENT TIME]

All of Ipsos MORI's surveys are conducted under the Market Research Society's Code of Conduct - your answers will be treated as completely anonymous and we will only be reporting back aggregate data to our client.

S1 Could you please tell me, are you the most appropriate person to speak to in relation to your businesses dealings with Invest NI?

Yes	1	CONTINUE
No	2	ASK FOR DETAILS OF APPROPRIATE CONTACT

Section 1: Overall familiarity and satisfaction

Q1. Q1 How well do you know Invest NI? READ OUT. REVERSE ORDER

Know it very well	1
Know a fair amount about it	2
Know a little	3
Heard of it, but know nothing about it	4

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Q2. Overall, how satisfied or dissatisfied are you with the service you have received from Invest NI in the past 12 months? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied

1 – Very satisfied	1
2	2
3	3
4	4
5 – Very dissatisfied	5
Don't know	6

()

IF DISSATISFIED 3-5 AT Q2

Q2A Is there a specific reason for saying that? PLEASE RECORD VERBATIM

Q3. Which of the following comes closest to how you would speak about Invest NI? READ OUT. REVERSE ORDER

Speak highly of it without being asked your opinion	1
Speak highly of it but only if you are asked	2
Be neutral about it	3
Be critical about if asked	4
Be critical about it without being asked	5
Don't know	6

Q4. In which, if any, of the following areas do you think Invest NI is currently involved? READ OUT A-F. ROTATE ORDER. MULTICODE OK.

Q5. ASK Q5 FOR EACH CODED AT Q4

And how would you rate Invest NI's performance in each of these areas on a scale of 1 to 5, where 1 means very good and 5 means very poor? READ OUT. ROTATE ORDER OF STATEMENTS

	Q4 – Involved	Q5					
		1- Very good	2	3	4	5 - Very poor	Don't know
A Helping businesses define and develop their strategy	1	1	2	3	4	5	6
B Improving skills and leadership support	2	1	2	3	4	5	6
C Helping to reduce costs and improve efficiencies	3	1	2	3	4	5	6
D Encouraging innovation and investment in R&D	4	1	2	3	4	5	6
E Helping businesses	5	1	2	3	4	5	6

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develop in export markets							
F Supporting business growth into higher value activities	6	1	2	3	4	5	6
None of these	7	-	-	-	-	-	-

Q6. To what extent to do you agree or disagree with each of the following statements about Invest NI. Please use a scale of 1 to 5, where 1 means strongly agree and 5 means strongly disagree? READ OUT A-G. ROTATE ORDER. SINGLE CODE ONLY

		1 - Strong ly agree	2	3	4	5- Strongl y disagr ee	No opinio n	
A	Invest NI is helping to develop your business	1	2	3	4	5	6	()
B	Invest NI offers a good range of programmes and support	1	2	3	4	5	6	()
C	Invest NI is adding value to your business	1	2	3	4	5	6	()
E	Invest NI is responsive to your business needs	1	2	3	4	5	6	()
H	Invest NI offers appropriate solutions for your business	1	2	3	4	5	6	()
G	Invest NI has a key role to play in the success of the NI economy	1	2	3	4	5	6	()
I	Invest NI has responded effectively to the economic downturn	1	2	3	4	5	6	()

OPTION D HAS BEEN REMOVED, OPTION H HAS BEEN ADDED

Q7. And to what extent do you agree or disagree with each of the following? Please use a scale of 1 to 5, where 1 means strongly agree and 5 means strongly disagree? READ OUT A-F. ROTATE ORDER. SINGLE CODE ONLY

		1- Strong ly agree	2	3	4	5 - Strongl y disagr ee	No opinio n	
A	Invest NI acts with professionalism and integrity	1	2	3	4	5	6	()
B	Invest NI is a customer focused organisation	1	2	3	4	5	6	()
C	Invest NI uses creativity and imagination to help you grow your business	1	2	3	4	5	6	()

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D	Invest NI staff are knowledgeable and bring expertise to your business	1	2	3	4	5	6	()
G	Invest NI is an important contributor to the success of your business	1	2	3	4	5	6	()
F	Invest NI provides a robust challenge to your business plans	1	2	3	4	5	6	()

OPTION E REMOVED, OPTION G ADDED

Section 2: Communication

Q8. Overall how satisfied or dissatisfied are you with the communication between yourself and Invest NI over the last 12 months? This might include telephone calls, written communication or emails, meetings with staff or just receiving information from Invest NI.

Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied
SINGLE CODE ONLY

1 - Very satisfied	1		
2	2	GO TO Q10	
3	3		
4	4	GO TO Q9	
5 - Very dissatisfied	5		
Don't know	6	GO TO Q10	()

IF RATE COMMUNICATIONS 3-5 AT Q8

Q9. Why did you say that? What could Invest NI do to improve its communications with you? PROBE FULLY AND WRITE IN. ANY ANSWER (WRITE IN AND CODE '1) 1 ()

None/no answer X

Don't know Y (-)

ASK ALL

DRAFT

Q10. Please could you tell me how satisfied or dissatisfied you are with the following aspects in relation to general enquires you have made to Invest NI? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied. READ OUT. ROTATE ORDER. SINGLE CODE ONLY

		1 - Very satisfie d	2	3	4	5 - Very dissat- isfied	No opinio n	
A	The speed your enquires are dealt with	1	2	3	4	5	6	()
B	Ease of obtaining the information you require	1	2	3	4	5	6	()
C	Ease of finding the correct contact within Invest NI	1	2	3	4	5	6	()
D	Your queries are dealt with by the most appropriate Invest NI personnel	1	2	3	4	5	6	()

Q11 a How satisfied or dissatisfied are you with the quality of marketing communications you received from Invest NI? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied SINGLE CODE ONLY

1 - Very satisfied	1	
2	2	
3	3	
4	4	
5 - Very dissatisfied	5	
Don't know	6	()

Q11 b How satisfied or dissatisfied are you with the relevance of marketing communications you received from Invest NI? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied SINGLE CODE ONLY

1 - Very satisfied	1	
2	2	
3	3	
4	4	
5 - Very dissatisfied	5	
Don't know	6	()

Q12 Would you say that volume and frequency of marketing communications you receive from Invest NI is too much, about right or too little? SINGLE CODE ONLY

Too much	1	
About right	2	
Too little	3	
Don't know	4	()

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Q13 Have you visited any of the following websites in the last 12 months? READ OUT A-B. MULTICODE OK

		()
A	The Invest NI website: www.investni.com	1
B	www.nibusinessinfo.co.uk	2
	www.boostingbusinessni.com	3
	None	4
	Don't know	5

ASK FOR EACH USED AT Q13

Q14 How useful if at all did you find <...>. Please use a scale of 1 to 5 where 1 means very useful and 5 means not at all useful. READ OUT. SINGLE CODE ONLY

		1- Very useful	2	3	4	5 – Not at all useful	No opinio n	()
A	The Invest NI website: www.investni.com	1	2	3	4	5	6	()
B	www.nibusinessinfo.co.uk	1	2	3	4	5	6	()
C	www.boostingbusinessni.com	1	2	3	4	5	6	

Section 3: People

ASK ALL

Q15 Overall, how satisfied or dissatisfied are you with service provided by the team of people you have been working with at Invest NI in the last 12 months. Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied SINGLE CODE ONLY

1 - Very satisfied	1	
2	2	
3	3	
4	4	
5 – Very dissatisfied	5	
Don't know	6	()

Q16 Have you had any direct liaison with your company's main contact within Invest NI in the last 12 months? This could be your Client Executive, Manager or Officer.

Yes	1	GO TO Q18
No	2	GO TO Q22 (Q30 on script)
Don't know	3	()

IF YES AT Q16 (CODE 1)

Q17 How frequently have you been in contact with your main contact over the last 12 months? PROBE TO PRECODES. SINGLE CODE ONLY

At least once a month	1
-----------------------	---

At least once every three months	2
About twice per year	3
Once a year or less	4
Don't know	5

()

Q18 Overall how satisfied or dissatisfied are you with the service provided from your main contact in the last 12 months? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied. SINGLE CODE ONLY

1 - Very satisfied	1	GO TO Q20 (Q21 on script)
2	2	
3	3	
4	4	GO TO Q19 (Q20 on script)
5 - Very dissatisfied	5	
Don't know	6	

()

IF RATE CLIENT EXECUTIVE 3-5 AT Q18. OTHERS GO TO Q20

Q19 Why do you say that? What could Invest NI do to improve your overall level of satisfaction with your main contact? PROBE FULLY AND WRITE IN. ANY ANSWER (WRITE IN AND CODE '1')

()

1

None/no answer

X

Don't know

Y

(-)

ASK ALL WHO SAY YES AT Q16 (CODE 1)

Q20 And how satisfied or dissatisfied are you with your main contact's performance on each of the following aspects ? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied. READ OUT A-H. ROTATE ORDER SINGLE CODE ONLY

		1 - Very satisfied	2	3	4	5 - Very dissatisfied	No opinion	
A	Knowledge about your industry sector	1	2	3	4	5	6	()
B	Knowledge about your business	1	2	3	4	5	6	()
C	Knowledge about key business functions	1	2	3	4	5	6	()
D	Making proactive suggestions	1	2	3	4	5	6	
E	Interest in learning about	1	2	3	4	5	6	

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	your company's business						
F	Responsiveness	1	2	3	4	5	6
G	Ease of contact	1	2	3	4	5	6

Q21 And to what extent do you agree or disagree with the following statements about your main contact? Please use a scale of 1 to 5 where 1 means strongly agree and 5 means strongly disagree. READ OUT A-B. ALTERNATE ORDER. SINGLE CODE ONLY

		1 - Strong ly agree	2	3	4	5 - Strongl y disagr ee	No opinio n	
A	Your main contact discusses and agrees realistic timescales for planned activities	1	2	3	4	5	6	()
B	Your main contact makes it clear from the outset if and how Invest NI could assist your business	1	2	3	4	5	6	()

Section 4: Programmes and Advisory Services

ASK ALL

Q22 How satisfied or dissatisfied are you with the quality of programmes and advisory services offered by Invest NI? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied? SINGLE CODE ONLY

1 - Very satisfied	1	
2	2	
3	3	
4	4	
5 - Very dissatisfied	5	
Don't know	6	()

ASK ALL

Q23 Which of the following advisory services offered by Invest NI have you heard of? MULTICODE OK

Q24 ASK FOR EACH HEARD OF AT Q23
And which have you used in the last 12 months?

Q25 ASK IF USED MORE THAN ONE ADVISORY SERVICE
And which one have you used most recently? SINGLE CODE ONLY

	Q23 ()	Q24 ()	Q25
Business Information Service	1	1	1
HR Advice and Workshops	2	2	2
ICT Advice	3	3	3
Trade and Marketing Advisors	4	4	4

Energy Advisors	5	5	5
Technical Advisory Unit (incl Intellectual Property Advice)	6	6	6
Business Health Check	7	7	7
Environmental & Waste Advice	8	8	8
Design Advice	9	9	9
Innovation Advisors	10	10	10
Property Search & Advice	11	11	11
None of these	12	12	12
Don't know	13	13	13

()

ASK FOR ONE SERVICE CODED AT Q24/5. IF NOT USED ANY ADVISORY SERVICES AT Q23 (CODE 12/13) GO TO Q28

Q26 Thinking about the Invest NI Advisor you worked with on that service, how satisfied or dissatisfied are you with his/her performance on each of the following aspects? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied. READ OUT A-H. ROTATE ORDER SINGLE CODE ONLY

		1 - Very satisfie d	2	3	4	5 - Very dissat- isfied	No opinio n	
A	Knowledge about their business specialism	1	2	3	4	5	6	()
B	Knowledge about your business	1	2	3	4	5	6	()
C	Making proactive suggestions	1	2	3	4	5	6	
D	Interest in learning about your company's business	1	2	3	4	5	6	
E	Responsiveness	1	2	3	4	5	6	
F	Ease of contact	1	2	3	4	5	6	

Q27 How satisfied or dissatisfied were you with the advice that you received? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied. SINGLE CODE ONLY

1 - Very satisfied	1
2	2
3	3
4	4
5 - Very dissatisfied	5
Don't know	6

()

Q28 Which of the following programmes offered by Invest NI have you heard of? MULTICODE OK

Q29 ASK FOR EACH HEARD OF AT Q28. IF NOT HEARD OF ANY GO TO Q32 And which have you participated in the last 12 months? MULTICODE OK

Q30 ASK IF PARTICIPATED IN MORE THAN FIVE SERVICES AT Q29 Which five of these programmes have you participated in most recently CODE FIVE MOST RECENT - MULTICODE UP TO 5

Q28

Q29

Q30

Grant for R&D (formerly Compete, Product & Process Development, START)	1	1	1
Support for Market Visits	2	2	2
Design Development Programme	3	3	3
Business Improvement Training Programme	4	4	4
ICT Support Programme - Management Information Systems	5	5	5
Energy and environment programme	6	6	6
Technical Development Incentive	7	7	7
Property Assistance	8	8	8
Interim Managers	9	9	9
Networking and Mentoring Support	10	10	10
None of these	11	11	-
Don't know	12	12	-

()

ASK Q31 FOR EACH PROGRAMME PARTICIPATED IN AT Q29/30 (UP TO FIVE PROGRAMMES PER RESPONDENT). IF NOT PARTICIPATED IN ANY PROGRAMMES AT Q29 GO TO Q32

Q31 And how satisfied or dissatisfied were you with the following programmes. Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied
SINGLE CODE ONLY

	1 - Very satisfie d	2	3	4	5 - Very dissat- isfied	No opinio n	
Grant for R&D (formerly Compete, Product & Process Development, START)	1	2	3	4	5	6	()
Support for Market Visits	1	2	3	4	5	6	()
Design Development Programme	1	2	3	4	5	6	()
Business Improvement Training Programme	1	2	3	4	5	6	()
ICT Support Programme - Management Information Systems	1	2	3	4	5	6	()
Energy and environment programme	1	2	3	4	5	6	()
Technical Development Incentive	1	2	3	4	5	6	()
Property Assistance	1	2	3	4	5	6	()
Interim Managers	1	2	3	4	5	6	()
Networking and Mentoring Support	1	2	3	4	5	6	()

Section 6: Financial Assistance

Q33 Have you sought financial assistance in the past 12 months to help you expand or develop your business (includes Growth Accelerator Programme)?

Yes	1	GO TO Q34
No	2	GO TO Q37
Don't know	3	

()

ASK ALL WHO SAY YES AT Q36 (CODE 1)

Q34 How much was the amount you sought? SINGLE CODE ONLY. IF APPLIED MORE THAN ONCE IN LAST 12 MONTHS ASK FOR MOST RECENT APPLICATION

Less than £50,000	1
£50 – 100,000	2
£100,000 - £500,000	3
£500,000 - £1m	4
More than £1m	5
Don't know	6

()

Q35 Was funding granted or turned down?

Granted	1
Still being progressed	2
Turned down	3
Don't know	4

()

Q36 How satisfied or dissatisfied were you with the following aspects of applying for financial assistance? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied SINGLE CODE ONLY

		1 - Very satisfie d	2	3	4	5 - Very dissat- isfied	No opinio n	
A	The application process	1	2	3	4	5	6	()
B	The time taken to obtain approval in relation to the level of funding	1	2	3	4	5	6	()

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Section 7: Claims Process

Q37 Have you claimed funding from Invest NI in the past 12 months?

Yes	1	GO TO Q38	
No	2	GO TO Q39	
Don't know	3		()

IF YES AT Q37

Q38 How satisfied or dissatisfied were you with each of the following aspects of the process? Please use a scale of 1 to 5 where 1 means very satisfied and 5 means very dissatisfied. SINGLE CODE ONLY

		1 - Very satisfie d	2	3	4	5 - Very dissat- isfied	No opinio n	
A	The Pre claims advice visit by Invest NI	1	2	3	4	5	6	()
B	The ease of completing the claims schedule / form	1	2	3	4	5	6	()
C	The length of time taken from advice visit to submission of claims form	1	2	3	4	5	6	()
D	That your claim was processed within 30 days	1	2	3	4	5	6	()
E	Communication with Invest NI Claims team	1	2	3	4	5	6	()

Section 8: Final questions

ASK ALL

Q39 Are there any other comments you would like to make about the service you receive from Invest NI? PROBE FULLY AND WRITE IN. ANY ANSWER (WRITE IN AND CODE '1) 1 ()

None/no answer X

Don't know Y (-)

DRAFT

Q40 We may want to re-contact some people we've talked to on this survey on behalf of Invest NI, in order to explore some of these issues in more detail - again, this would be entirely voluntary and confidential. Would you be willing to take part in a further research exercise?

Yes	1
No	2

()

Thank you for taking the time to answer our questions. Your responses will be combined with others to get a consensus of opinion of these issues. Your specific answers will remain confidential