

# Annual Customer Satisfaction Survey 2017

## Detailed results

**KANTAR** MILWARD BROWN

Final report prepared for Invest Northern Ireland

# Summary & Conclusions

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## Key messages and recommendations

At 86%, overall satisfaction remained consistent with the high levels of 2014 and 2015. Although 2016 findings were marginally lower than 2015 in relation to those claiming to be 'very' satisfied, the encouraging trend that had emerged over the previous years remained. (53% in 2016, 56% in 2015; 47% in 2014; 37% in 2013; 37% in 2012). Levels of dissatisfaction were low at 2%.

In terms of customer advocacy, 2016 findings were on par with 2015 albeit still down on 2014 (2016 79%; 2015 80%; 2014 83%). Encouragingly, there was a much higher proportion in 2016 compared to previous years who would speak highly of Invest NI without being prompted (46% in 2016; 33% in 2015; 37% in 2014; 23% in 2013).

There was a downward trend in terms of the Net Promoter Score which had fallen from '51' in 2015 to '48' in 2016. The NPS score was highest amongst those customers from the Stage of Development division (54). This division also had the highest mean score for overall satisfaction at 4.48.

# Summary & Conclusions

## Image and associations

In terms of Invest NI's remit, the organisation was perceived to perform best in terms of encouraging innovation and investment in research and development (75% in 2016) and helping businesses to develop in export markets (75% in 2016). Similar to 2015, the area with most room for improvement was helping reduce costs and improve efficiencies with 53% of customers in 2016 rating Invest NI as good in this field. Levels in 2016 remain similar to the 2015 level of 54%.

In terms of the organisations image, Invest NI was most strongly linked with the same attributes as in 2015, however there was marginal declines in agreement in some areas. Invest NI was most strongly associated with being polite and friendly (95% agreed; 96% in 2015; 97% in 2014; 93% in 2013), acting professionally and with integrity (94% agreed; 93% in 2015; 94% in 2014; 90% in 2013) as well as treating customers fairly (89% agreed; 85% in 2015; 87% in 2014; 84% in 2013).

The mean scores calculated for both attributes, treating customers fairly (4.44 in 2016; 4.34 in 2015) and offering appropriate solutions (3.95 in 2016 and 3.85 in 2015) experienced a notable uplift in 2016.

# Summary & Conclusions

## Communication

Satisfaction with communication between Invest NI and its customers remained high, although experienced a marginal decline in 2016 (85% in 2016; 88% in 2015; 89% in 2014). Of the 3% dissatisfied with communication, the main criticisms were the lack of regular contact (19%) and speedier turnaround in terms of contact (19%).

Satisfaction with all key aspects of communication remained high and on par with 2015 findings. Speaking to the most appropriate staff member (84%) and the ease with which they can find the correct contact for their query (78%) remained the top 2 aspects customers were most satisfied with. When analysing by mean score, there was a notable increase in satisfaction with the speed in which enquiries are dealt with (4.15 in 2016; 4.05 in 2015; 4.03 in 2014; 3.99 in 2013).

## Marketing materials

Overall satisfaction with the content of digital communications received from Invest NI sat at 66% in 2016, a marginal increase to the 2015 level at 64%.

# Summary & Conclusions

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## Websites

2 in 5 (41%) customers claimed they had visited Investni.com in the last 3 months, compared to almost 1 in 4 (25%) who had visited nibusinessinfo.co.uk in the same period. When questioned about the aspect they particularly liked about the websites the result was similar across both websites with the content coming out on top (40% for investni.com; 49% for nibusinessinfo.co.uk).

# Summary & Conclusions

## Team and main contact

Satisfaction with the Invest NI team and customers' main contacts remained fairly consistent with the 2015 levels achieved. Almost 9 in 10 were satisfied with the team (87% in 2016; 88% in 2015; 89% in 2014; 84% in 2013; 80% in 2012; 73% in 2011). While customers remained satisfied with all aspects regarding their main contact's performance; marginal levels of decline were experienced in each. These Invest NI contacts performed extremely well at being trustworthy (92% satisfied; 94% in 2015) and responsive (87% satisfied; 90% in 2014).

Majority of customers stated their main Invest NI contact made it clear from the start how INI could assist their business (86% agree) and were provided with realistic timescales (85% agree).

Over three quarters (79%) had communicated with their main contact at least once every 3 months over the last year, with 30% communicating on a monthly basis. The more frequent the contact with the team, up to at least every 3 months, the more likely the customer was to be satisfied. Contacting customers more than once a quarter will not necessarily improve satisfaction levels. Some 87% agreed communication at least once every 3 month was ideal frequency with email (53%), face to face (26%) and telephone (20%) the preferred methods of contact by most.

# Summary & Conclusions

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## **Invest NI programmes and advisory services**

Almost 3 in 4 customers (74%) were satisfied with the quality of programmes and advisory services offered by Invest NI; decreasing from the 2015 level of 78%.

## **Financial assistance and claims' process**

Over half of customers (56%) sought funding in 2016 (down from 65% in 2015). Of these, 76% were satisfied with the application process (up from 72% in 2015). Some 72% were content with the time taken to approve their application (marginally down from 73% in 2015).

The preliminary advice visit continued to be rated the strongest performing area of the financial assistance process. Upward trends were evident across most metrics. Communication with the claims teams experienced a decline in both overall satisfaction (77% in 2016; 86% in 2015) and mean score (4.24 in 2016; 4.37 in 2015).

Satisfaction varied across the metrics when it came to the level of financial assistance customers were seeking. The aspect with the greatest differential in satisfaction was in relation to the claim being processed with 30 days. Those seeking more than 100K were much less satisfied (67%) compared to those seeking less than 100K (81%).

# Summary & Conclusions

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## **Complaints and feedback process**

Almost 3 in 5 (58%) customers were aware of the complaints and feedback process, up from 54% in 2015 and 49% in 2014. Reassuringly almost all (98%) had never had to make a complaint.

Almost 2 in 5 (39%) had used the new single claims form, with 63% claiming the form made it easier to claim (up from 50% in 2015). 10% stated it made the process more difficult and 28% felt it made no difference.

## **Improvements customers want to see**

While almost half (49%) were unable to suggest any improvements, a better claims process and more grant updates were most commonly mentioned (9%). Some 8% felt there could be an improvement in terms of direct communication and support. Further clarity into application forms (5%), more frequent updates and further types of funding (4%) were all suggested improvements.

# Agenda

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- **Study Set-up**
- Overall Satisfaction, Familiarity and Advocacy
- Image dimensions
- Overview satisfaction KPIs
- Communication
- Team and main contact
- Programmes & Advisory services
- Financial assistance and claims process
- Complaints & Feedback Process
- Suggested Improvements

## Study Set-Up

- 320 telephone interviews were conducted between 27<sup>th</sup> February to 24<sup>th</sup> March 2017.
- Quotas were placed on division. The table below shows the breakdown of the sample achieved.

Division	% in universe	% of sample	Achieved sample
Advanced Manufacturing and Engineering	39%	38%	126
Food and Drink Division	17%	16%	53
Life Sciences and Scaling	3%	3%	10
Stage of Development	27%	26%	85
Technology and Services	14%	17%	46
<b>Total</b>			<b>320</b>

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.

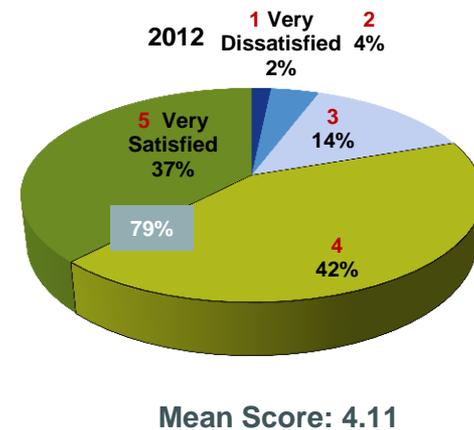
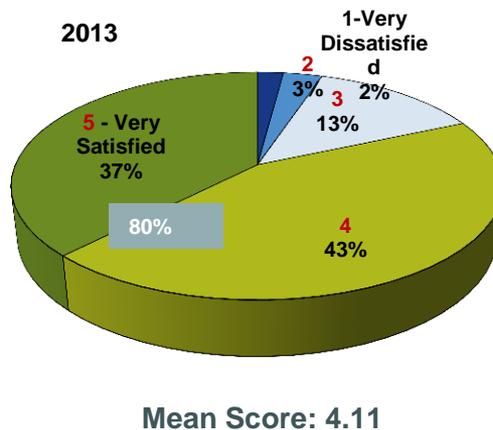
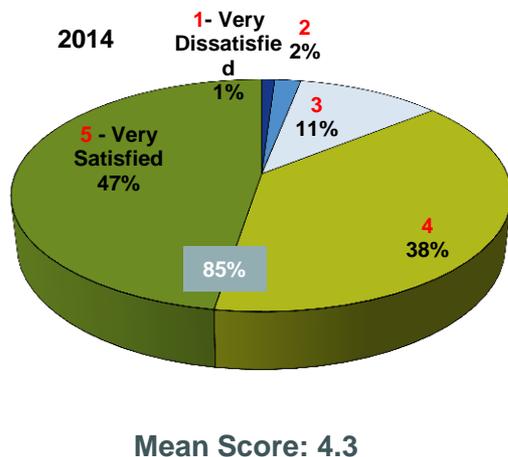
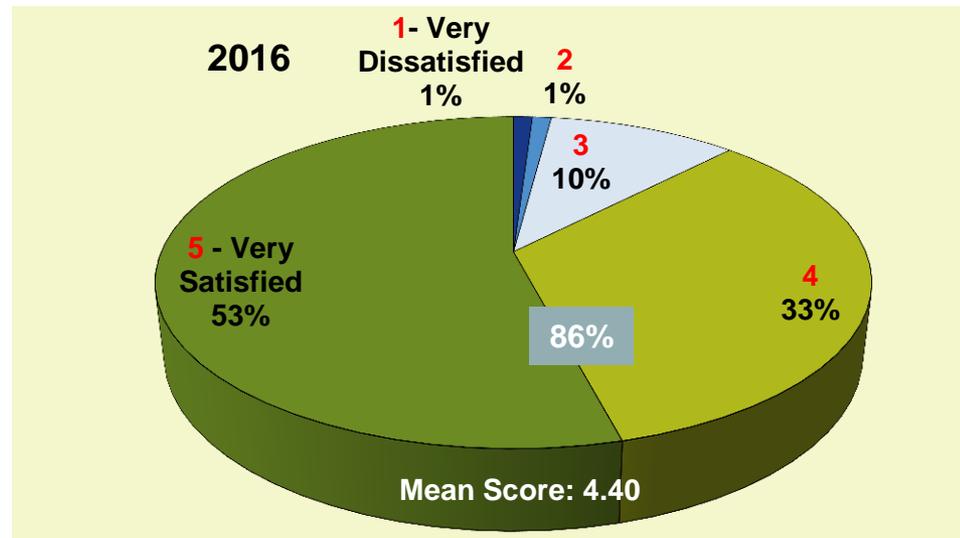
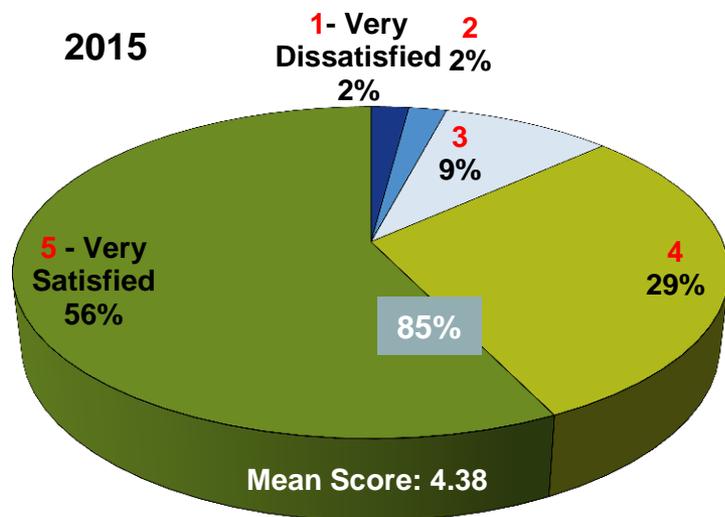
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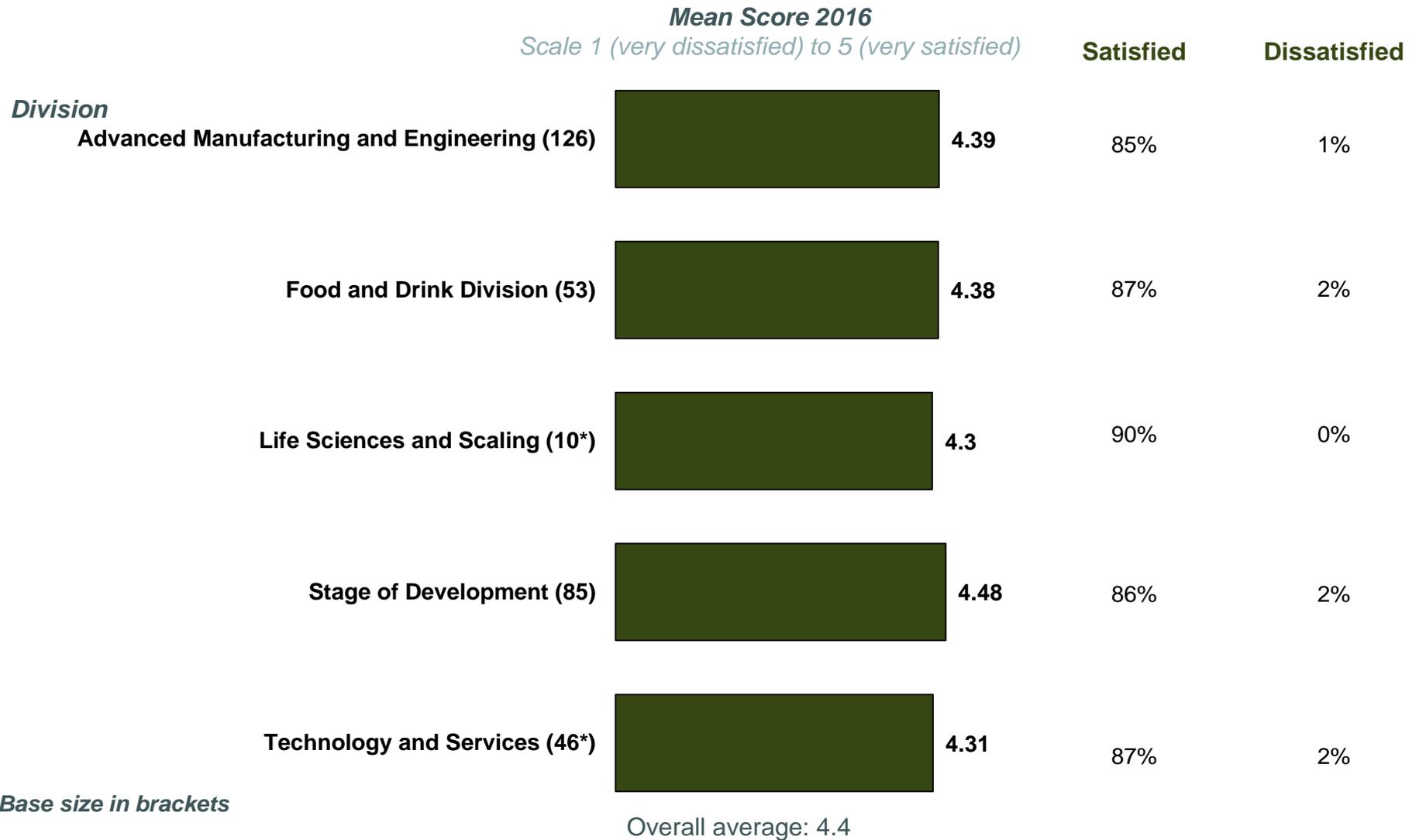
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Encouragingly, the proportion claiming to be satisfied with Invest NI continued to increase in 2016.

1=very dissatisfied \ 5=very satisfied

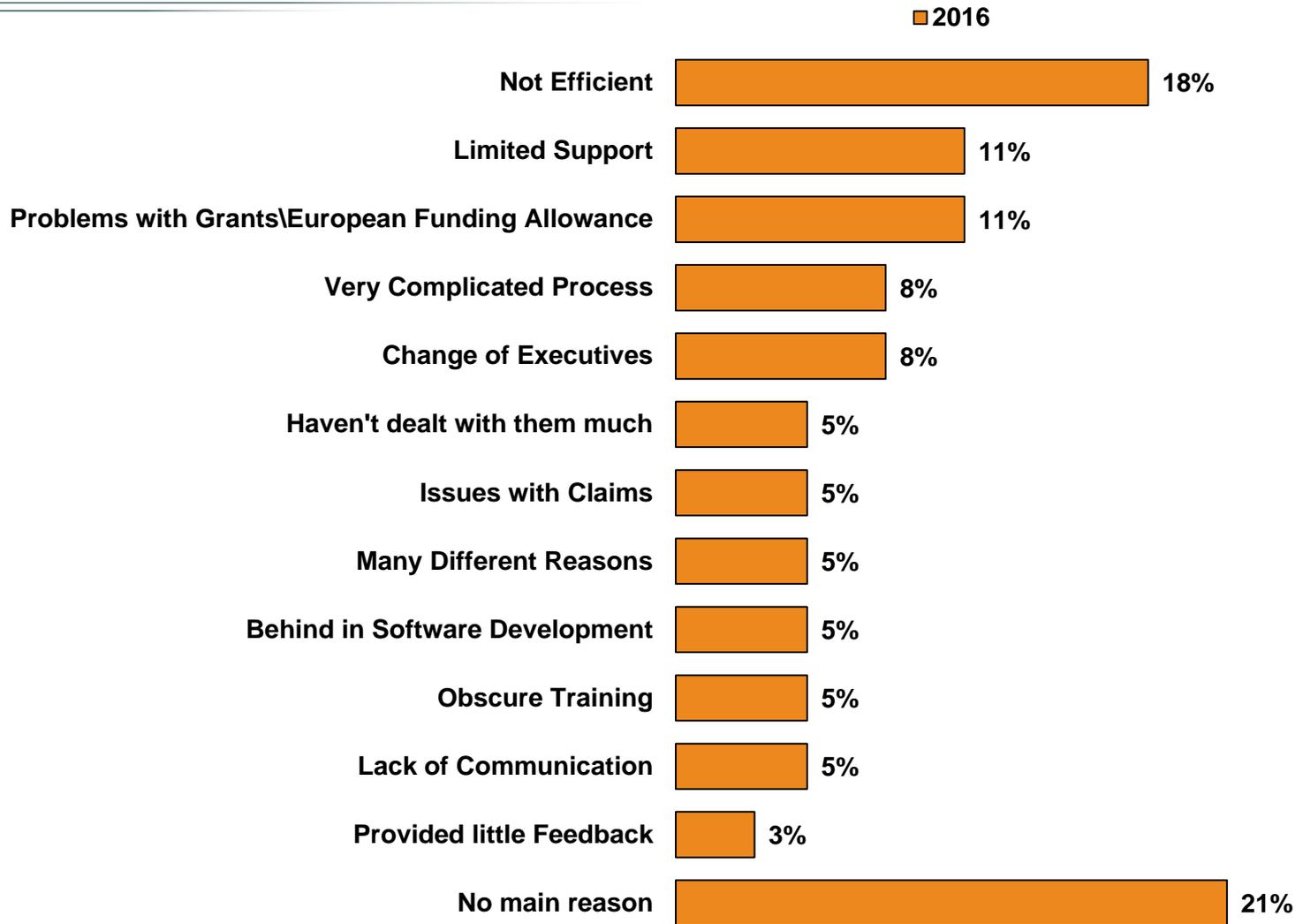


All divisions achieved satisfaction scores of at least 85%. *The highest score was 90%, however the base size for this division is too small to draw any conclusions from.*



\*Small Base

The top 3 reasons cited for being dissatisfied with the service received were lack of efficiency, limited support and problems with grants and funding allowance.



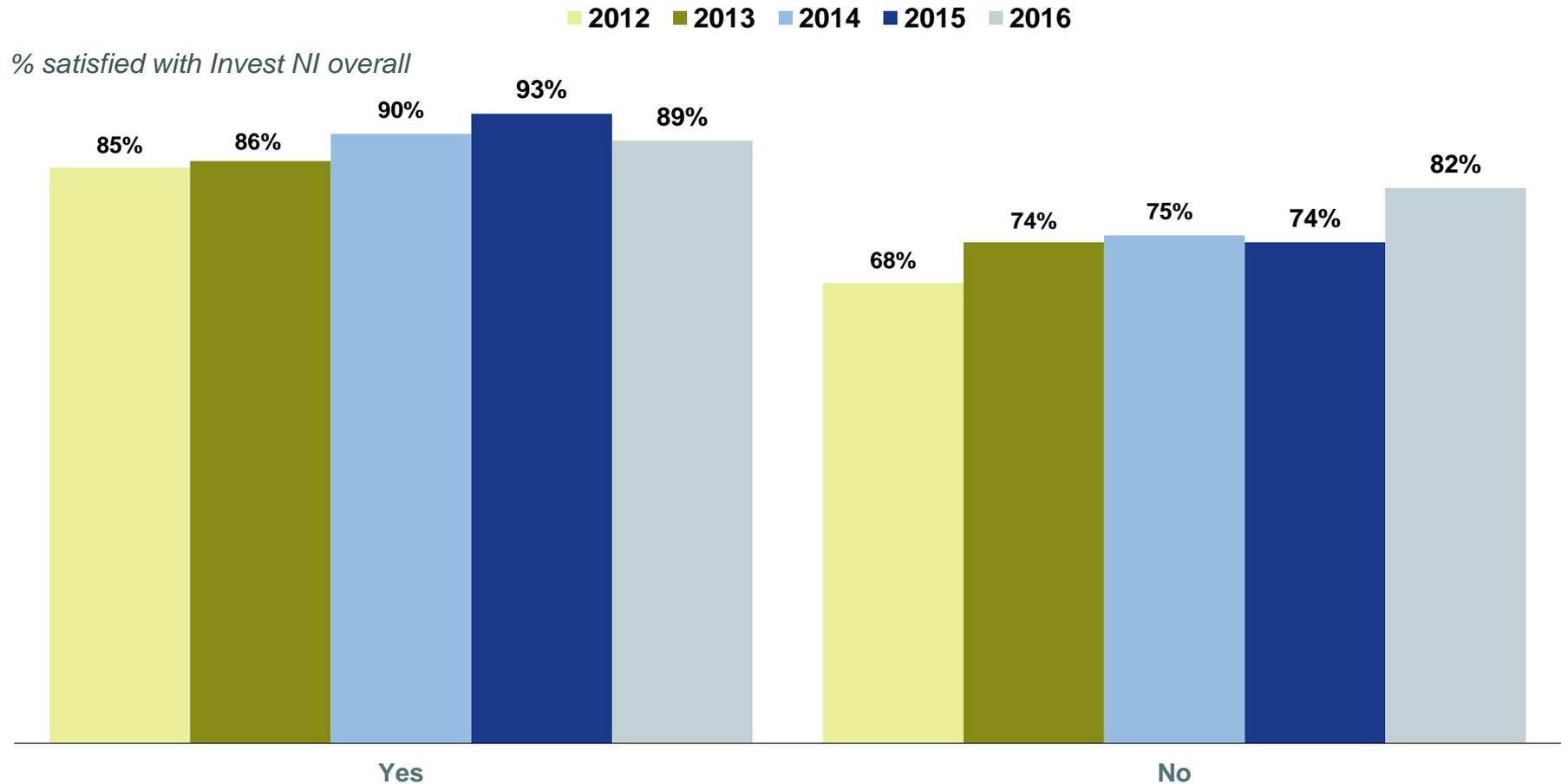
Is there a specific reason for saying that?

[ Base: Dissatisfied with the service you have received from Invest NI in the past 12 months n=38 ]

Those with more frequent contact were more likely to be satisfied at an overall level. However, the difference in level of satisfaction was not as great as previous years have shown.

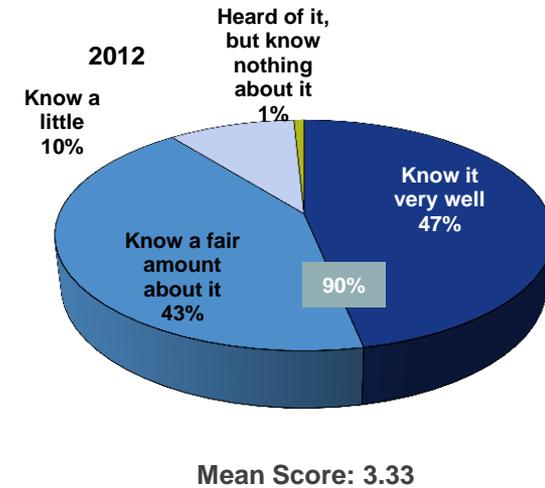
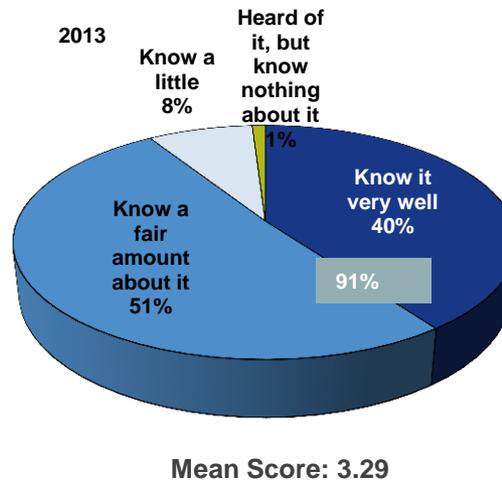
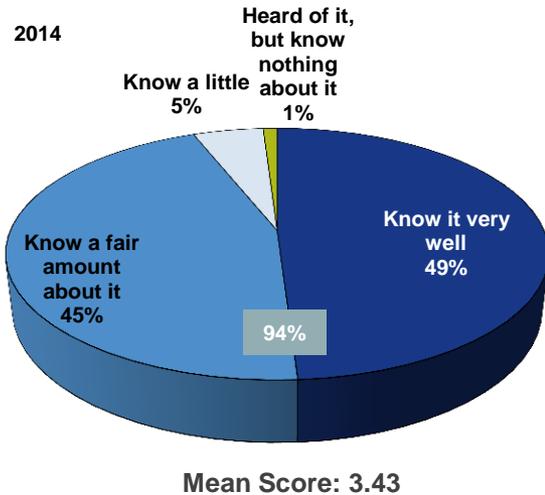
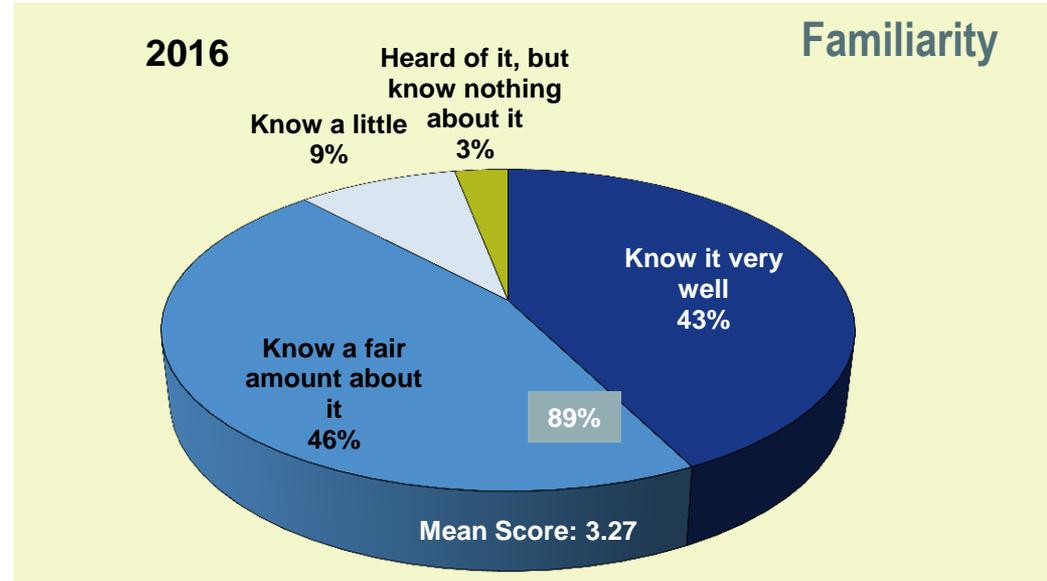
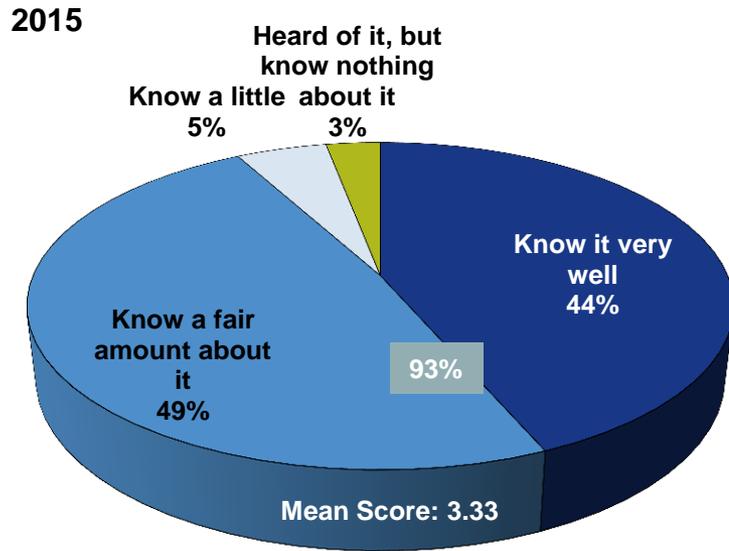
Overview: Impact of frequent contact on overall satisfaction

Contact with main contact at least once every three months



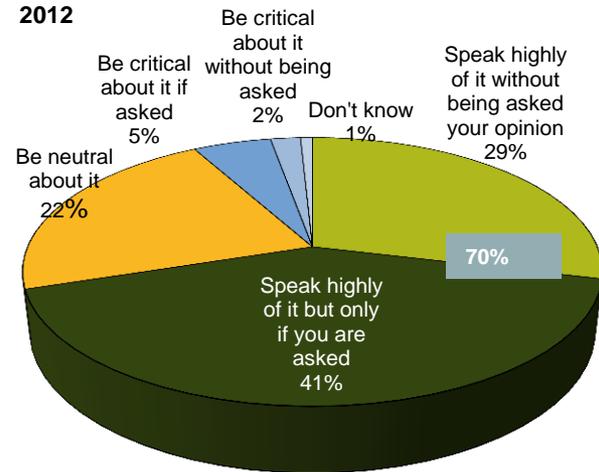
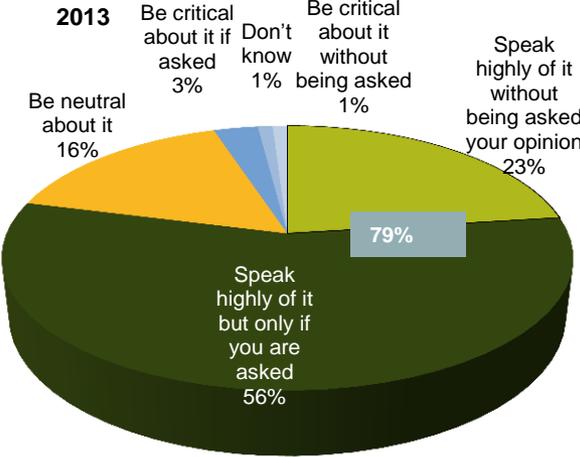
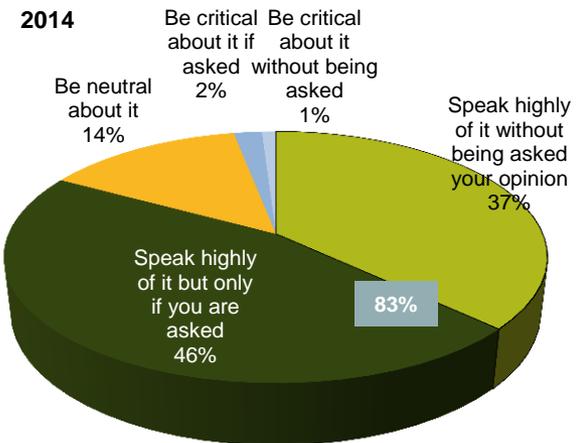
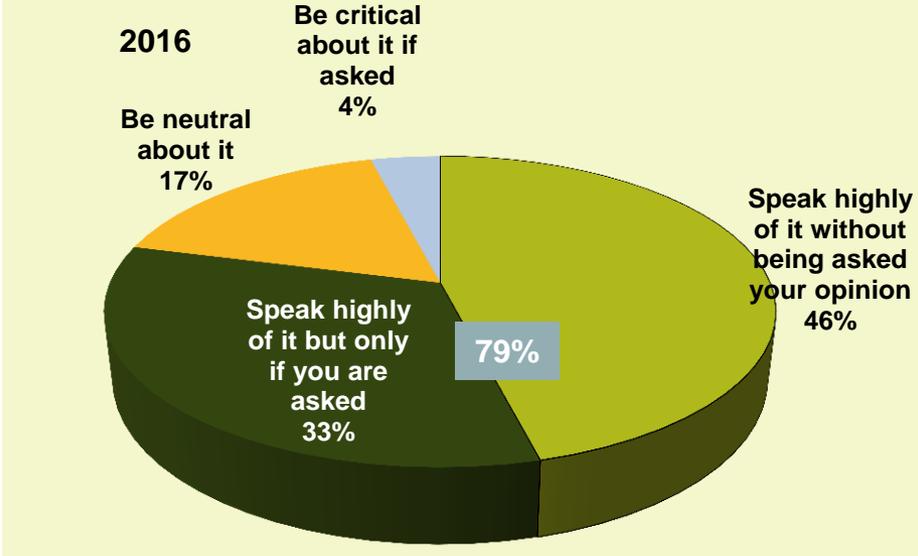
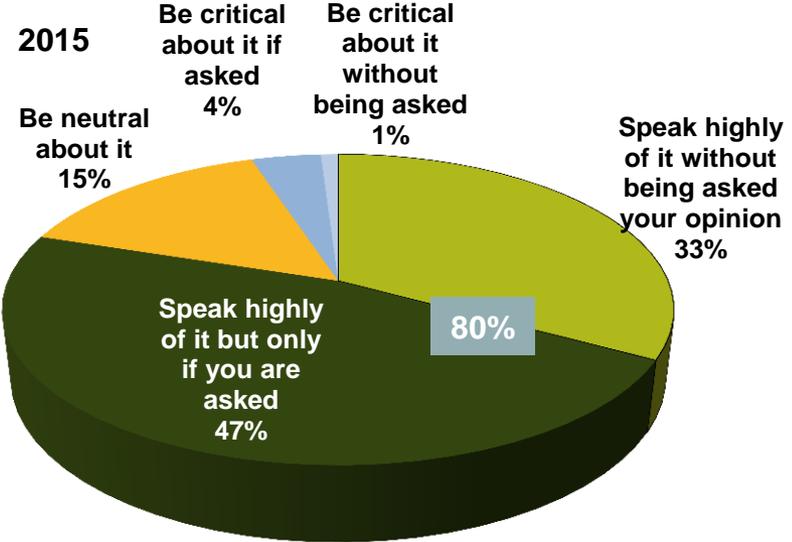
Overall, how satisfied or dissatisfied are you with the service you have received from Invest NI in the past 12 months? [ Base: All Invest NI customers n=320 ]

Levels of familiarity with Invest NI dropped in 2016. Compared to the previous two years, a higher proportion were more likely to say they 'know a little' about Invest NI.



**Familiarity**

Advocacy levels remained fairly consistent in 2016. Encouragingly, the number claiming they would speak highly of Invest NI without being prompted experienced an upward trend.



# Net Promoter Score- 2016

## NPS by Division

	Overall	Advanced Manufacturing and Engineering	Food and Drink Division	Life Sciences and Scaling	Stage of Development	Technology and Services
n=	320	126	53	10	85	46
Promoters	56	57	57	30	61	50
Passives	36	36	36	50	32	42
Detractors	8	7	8	20	7	8
<b>NPS (promoters-detractors)</b>	48	50	49	10	54	42

- Better than overall NPS
- Worse than overall NPS

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: All Invest NI customers n=320 ]

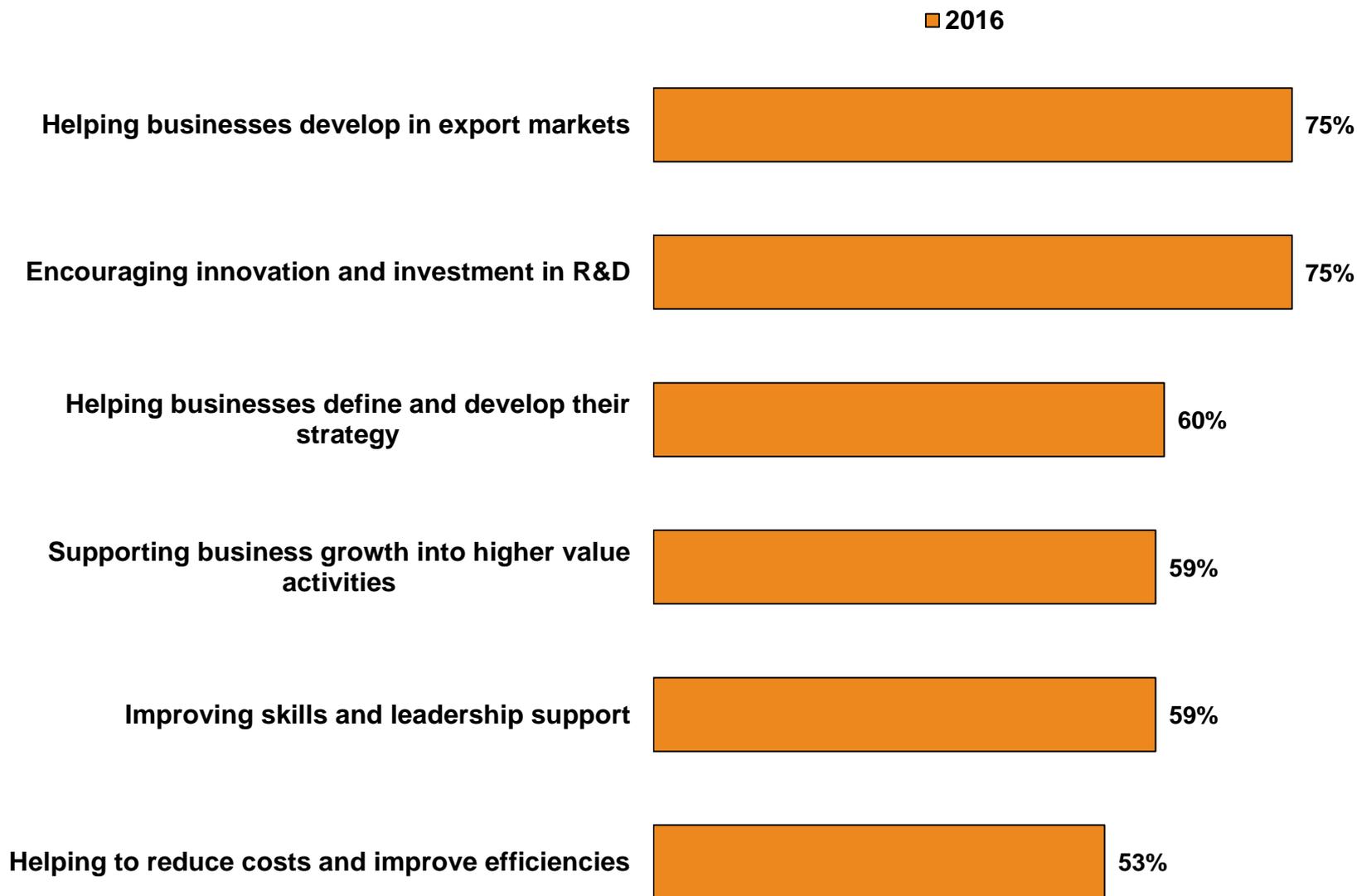
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Invest NI's top 2 strongest areas of performance were perceived as being business development in export markets and encouraging innovation.

### How Invest NI performs in these areas



Invest NI remains strongly associated with being polite and friendly, acting professionally and with integrity as well as treating customers fairly. Regarding 'treating customers fairly', the mean score for this image experienced a notable uplift on 2015.

Image dimensions (1 of 2)

Invest NI ...	Mean Score 2016	Mean Scores				Agree					Disagree				
		2015	2014	2013	2012	2016	2015	2014	2013	2012	2016	2015	2014	2013	2012
Polite and friendly	4.68	4.61	4.72	4.48	-	95%	96%	97%	93%	-	1%	1%	1%	1%	-
Acts with professional and integrity	4.57	4.49	4.56	4.33	4.27	94%	93%	94%	90%	86%	1%	2%	2%	2%	3%
Treated you fairly	4.44	4.34	4.4	4.21	-	89%	85%	87%	84%	-	3%	4%	3%	4%	-
Has a key role to play in the success of the NI economy	4.29	4.27	4.32	4.15	4.08	81%	83%	84%	79%	75%	4%	4%	4%	6%	7%
Is a customer focussed organisation	4.27	4.24	4.22	4.06	3.81	81%	83%	82%	77%	67%	3%	5%	5%	7%	10%
Staff are knowledgeable and bring expertise to your business	4.22	4.21	4.21	3.91	3.77	82%	83%	82%	73%	66%	4%	4%	4%	7%	11%
Is adding value to your business	4.1	4.04	4.04	3.83	3.72	77%	75%	76%	68%	62%	7%	8%	7%	10%	12%

Invest NI was also associated with being responsive to customers business needs and being an ideal business partner, with a slight uplift in these perceptions since 2015. It is worth noting the derived mean score for offering appropriate solutions to customers also experienced a weighty uplift on 2015.

Image dimensions (2 of 2)

Invest NI ...	Mean Score 2016	Mean Scores					Agree					Disagree				
		2015	2014	2013	2012	2011	2016	2015	2014	2013	2012	2011	2016	2015	2014	2013
<p>Scale 1 (strongly disagree) to 5 (strongly agree)</p> <p><b>Is responsive to your business needs</b></p>  <p><b>4.07</b></p>	4.02	3.8	3.8	3.66	3.5	79%	74%	74%	69%	59%	7%	7%	7%	11%	13%	
<p><b>Is an ideal business partner</b></p>  <p><b>4.03</b></p>	4.01	4	3.7	3.6	3.5	71%	74%	74%	60%	56%	8%	7%	7%	12%	13%	
<p><b>They are easy to do business with</b></p>  <p><b>4.03</b></p>	3.90	3.93	3.76	3.68	3.5	75%	71%	71%	67%	63%	9%	11%	11%	12%	15%	
<p><b>Offers appropriate solutions for your business</b></p>  <p><b>3.95</b></p>	3.85	3.84	3.71	3.53	3.5	72%	67%	67%	61%	54%	8%	7%	7%	10%	15%	
<p><b>Is an important contributor to the success of your business</b></p>  <p><b>3.86</b></p>	3.88	3.85	3.61	3.46	3.5	68%	66%	66%	59%	50%	12%	12%	12%	15%	18%	
<p><b>Provides a robust challenge to your business</b></p>  <p><b>3.64</b></p>	3.68	3.67	3.41	3.22	3.5	54%	54%	54%	47%	37%	15%	12%	12%	18%	22%	

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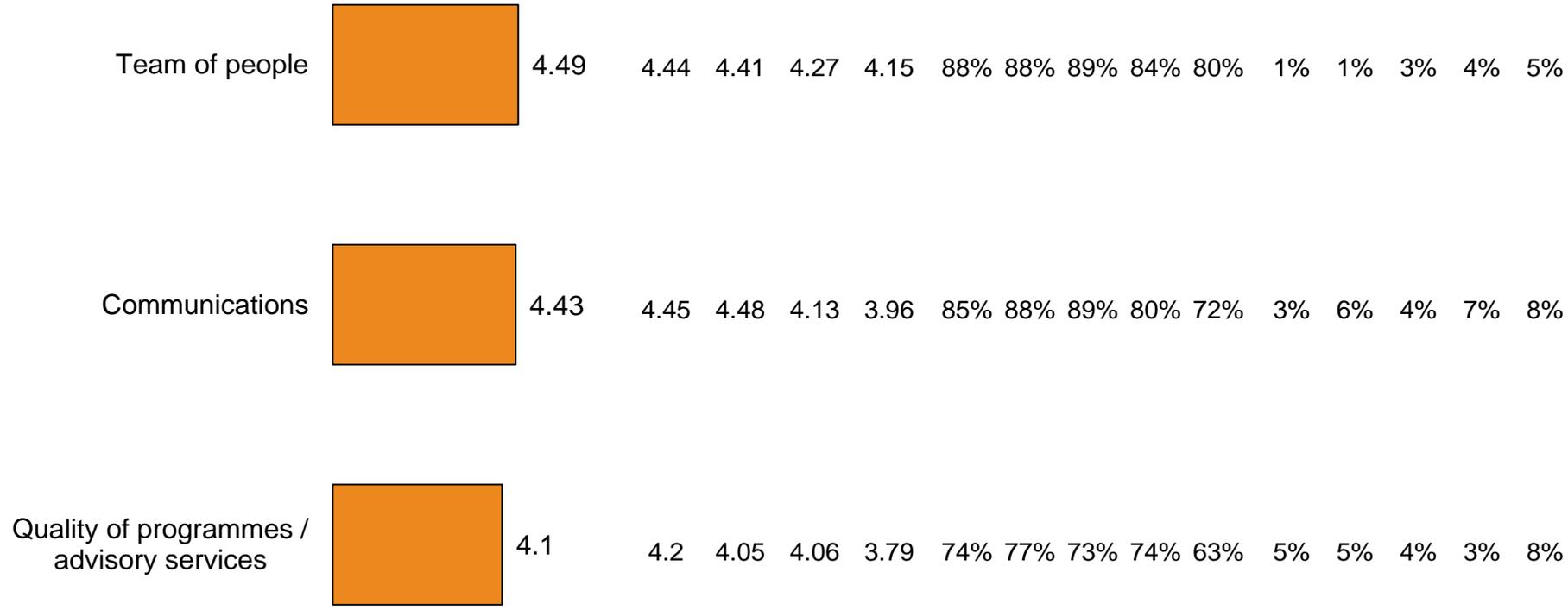
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Satisfaction with their team of people is on par with 2015 findings. However, satisfaction levels in relation to communication with main contact and quality of programmes and advisory services experienced a marginal decline.

Satisfaction by area

**Mean Score 2016**  
*Scale 1 (very dissatisfied) to 5 (very satisfied)*

Mean Scores					Satisfied					Dissatisfied				
2015	2014	2013	2012	2016	2015	2014	2013	2012	2016	2015	2014	2013	2012	



How satisfied or dissatisfied are you with the ... offered by Invest NI?  
 [ Base: All Invest NI customers n=320 ]

# Satisfaction levels in all areas - 2016

## Satisfaction by Division

### Mean Score 2016

Scale 1 (Very dissatisfied) to 5 (Very satisfied)

	TOTAL	Advanced Manufacturing and Engineering	Food and Drink Division	Life Sciences and Scaling	Stage of Development	Technology and Services
Team of people	4.49	4.46	4.49	4.2	4.56	4.49
Communication	4.43	4.51	4.49	4.3	4.38	4.26
Quality of programmes / advisory services	4.1	4.18	4.06	3.78	4.12	3.98

- Better than overall average
- Worse than overall average

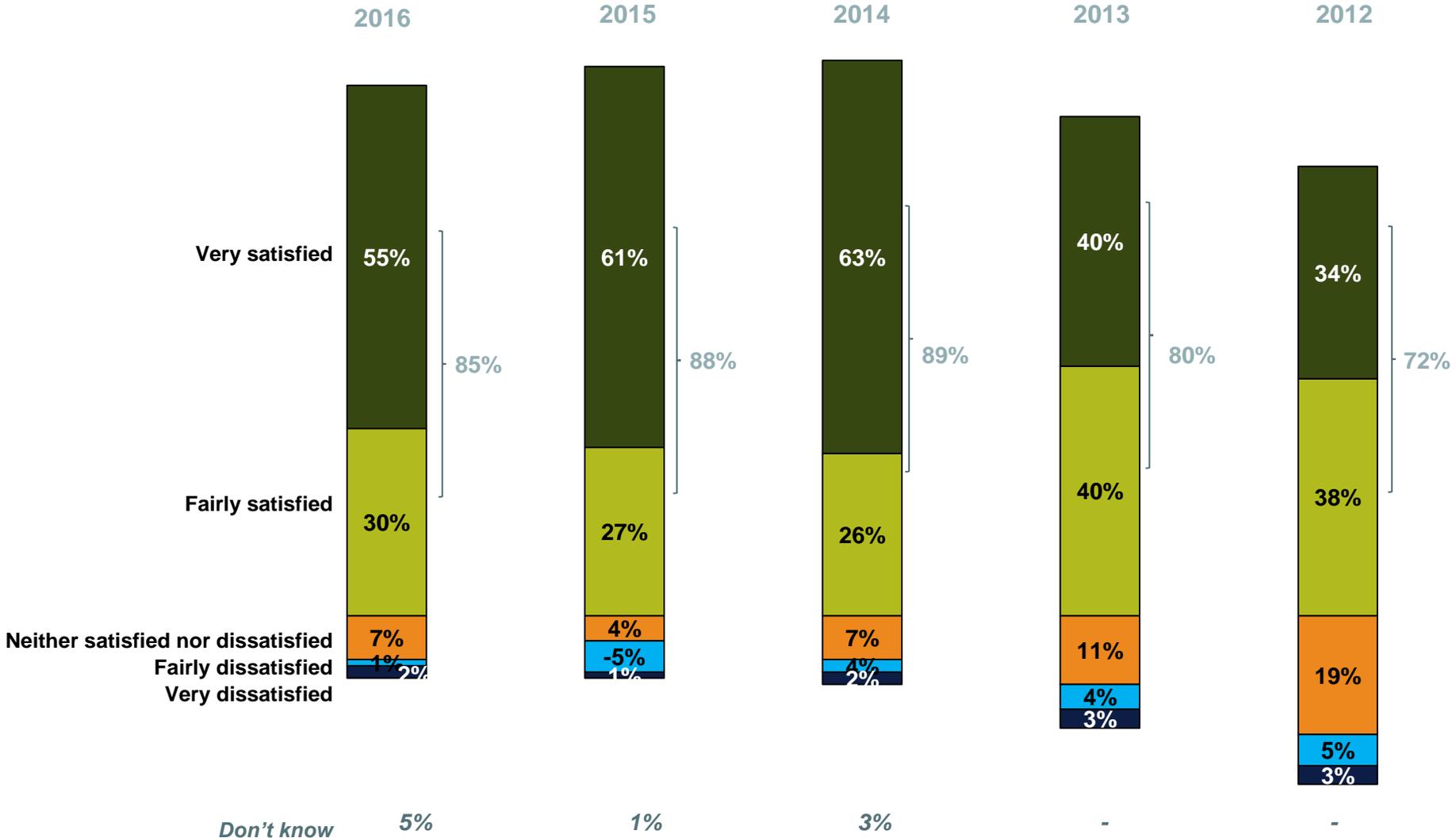
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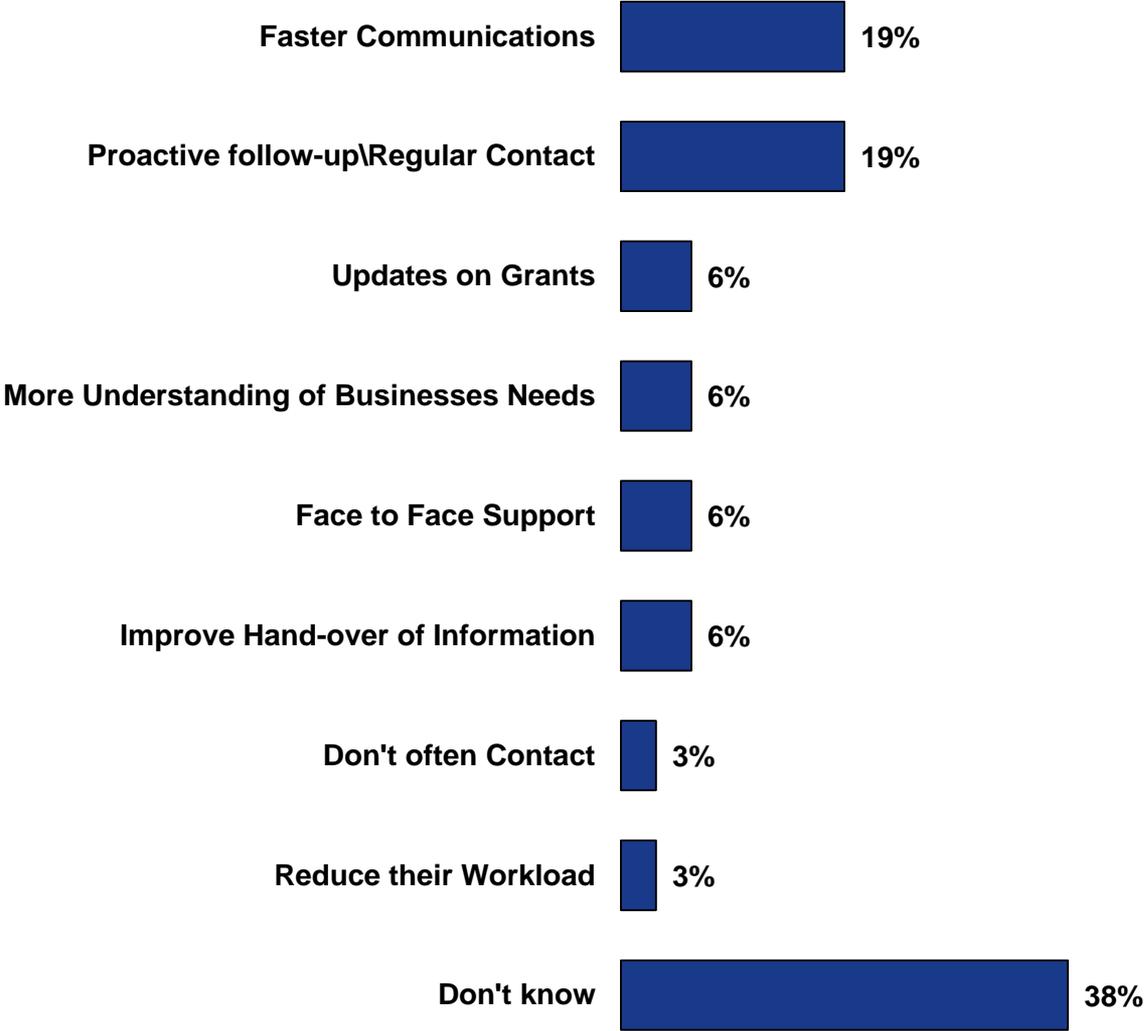
# Satisfaction with communication declined marginally in 2016.

## Overall satisfaction with communication

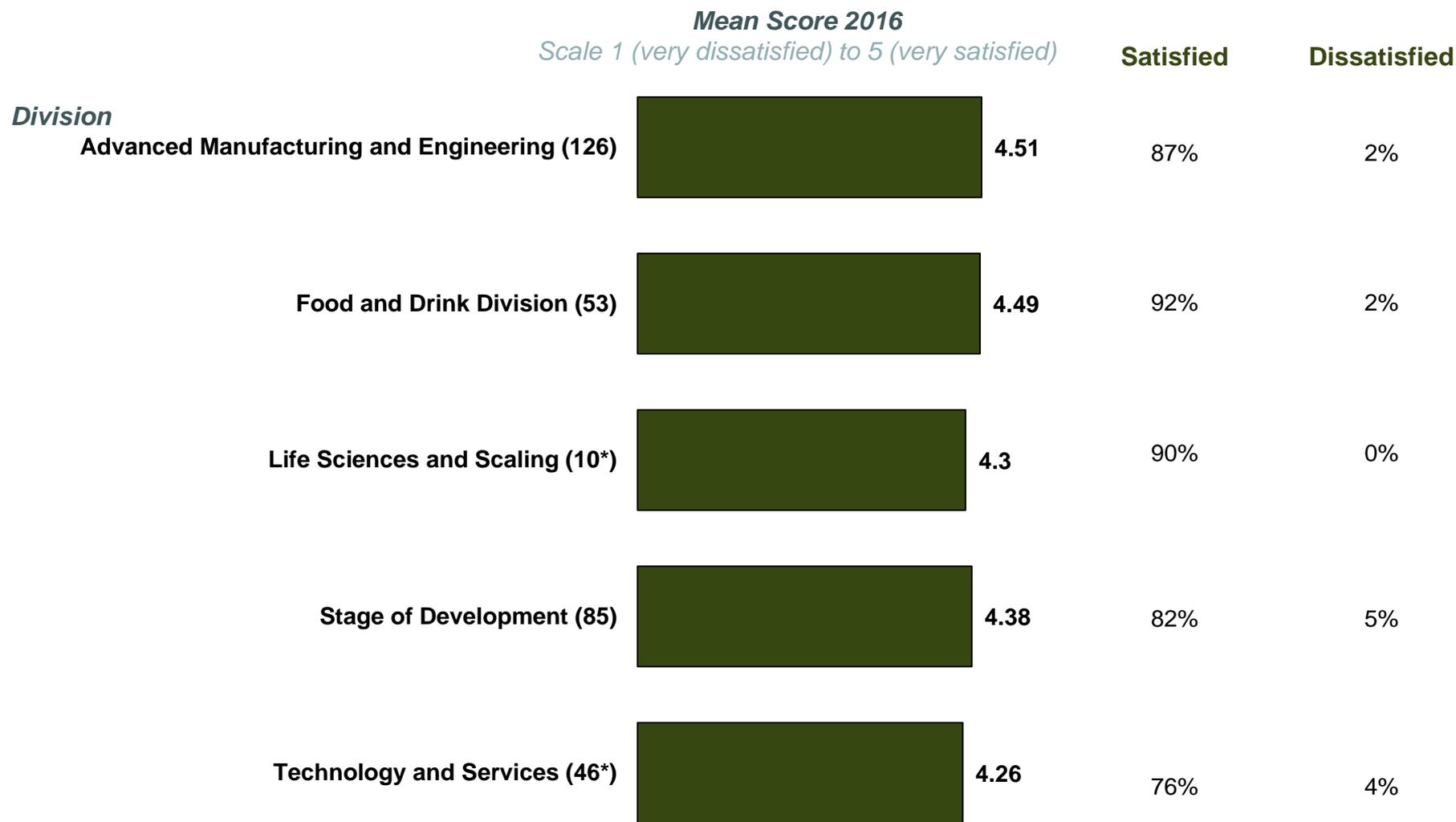


Overall how satisfied or dissatisfied are you with the communication between yourself and your main Invest NI contacts over the last 12 months? [ Base: All Invest NI customers n=320 ]

Some 32 customers were not satisfied with the communication with their main Invest NI contacts. By far the biggest driver of dissatisfaction was lack of communication.



Advanced manufacturing and engineering and Food and Drink customers were most satisfied with communication in terms of mean scores. *Sample size for Life Sciences and Scaling was too small to draw any conclusions from.*



Base size in brackets

Overall how satisfied or dissatisfied are you with the communication between yourself and you main Invest NI contacts over the last 12 months?

\*Small Base

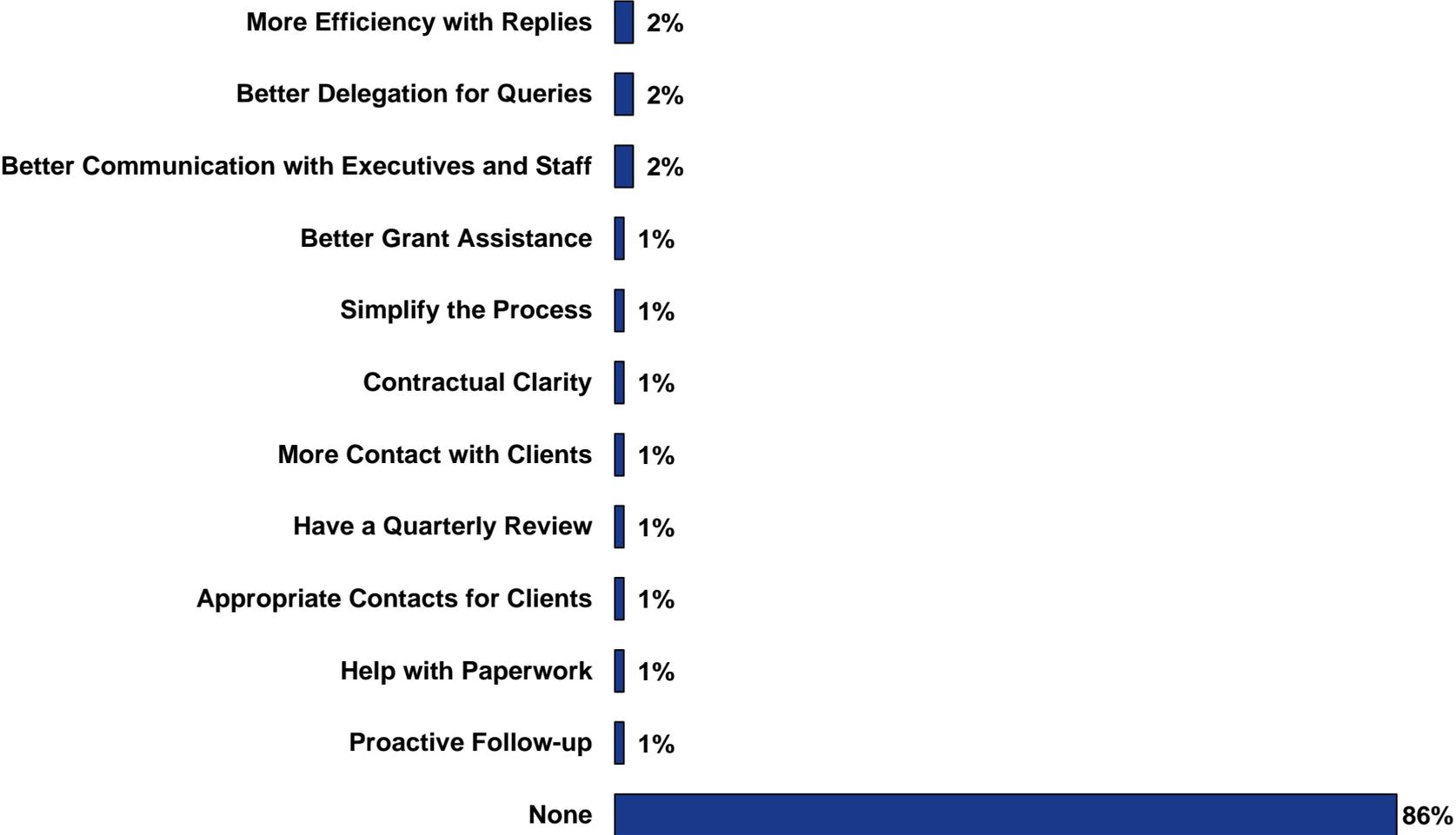
There were high levels of satisfaction with all areas of communication with all scores fairly consistent with 2015. Encouragingly, there was a notable increase in satisfaction in terms of mean score with the speed in which enquiries are dealt with.

Satisfaction with communication aspects

	Mean Score 2016 <i>Scale 1 (Very dissatisfied) to 5 (Very satisfied)</i>	Mean Scores				Satisfied					Dissatisfied				
		2015	2014	2013	2012	2016	2015	2014	2013	2012	2016	2015	2014	2013	2012
Overall satisfacton with communication	4.43	4.45	4.48	4.13	3.96	85%	88%	88%	80%	72%	3%	6%	4%	7%	8%
Your queries are dealt with by the most appropriate Invest NI personnel	4.29	4.26	4.26	4.13	4.08	84%	82%	85%	80%	77%	3%	2%	3%	4%	6%
Ease of finding the corect contact within Invest NI	4.17	4.13	4.1	4.05	3.98	78%	77%	77%	78%	71%	4%	5%	5%	6%	7%
The speed your enquiries are dealt with	4.15	4.05	4.03	3.99	3.93	79%	76%	75%	75%	71%	4%	8%	7%	7%	8%
Ease of obtaining the information your require	4.08	4.05	3.99	3.98	3.9	75%	76%	73%	72%	69%	5%	5%	5%	5%	8%

Overall how satisfied or dissatisfied are you with ...between yourself and Invest NI over the last 12 months? [ Base: All Invest NI customers n=320]

Below is a list of suggested improvements in relation to communication. Becoming more efficient in terms of replying to customers and better delegation of customer queries were some of the suggestions offered. Reassuringly the majority had no suggestions.



Two thirds of customers were satisfied with digital communications from Invest NI. There were low levels of dissatisfaction and almost a sixth remained neutral.

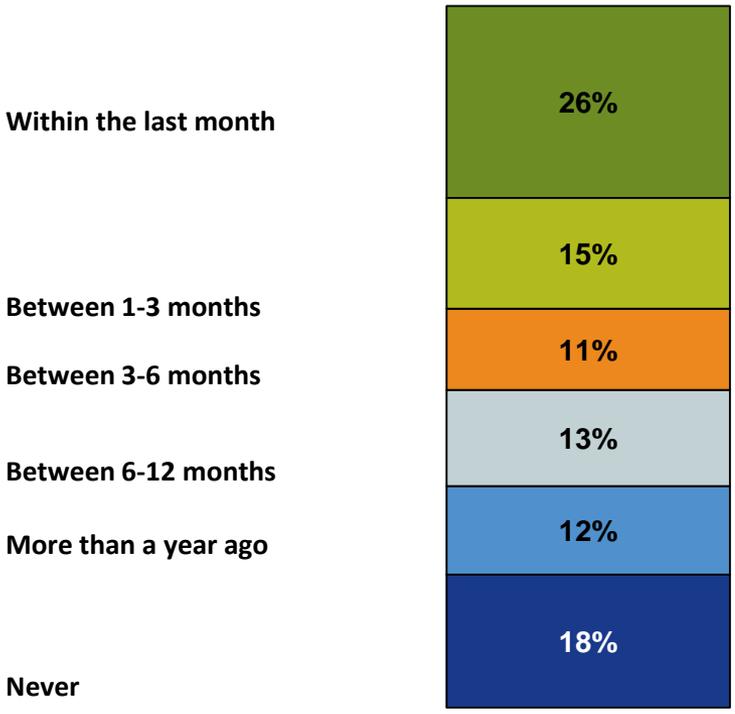


Customers were more likely to have visited investni.com than nibusinessinfo.co.uk, with it being more likely to have been viewed recently also.

2016 Usage of websites

www.investni.com

www.nibusinessinfo.co.uk



Don't Know 5%

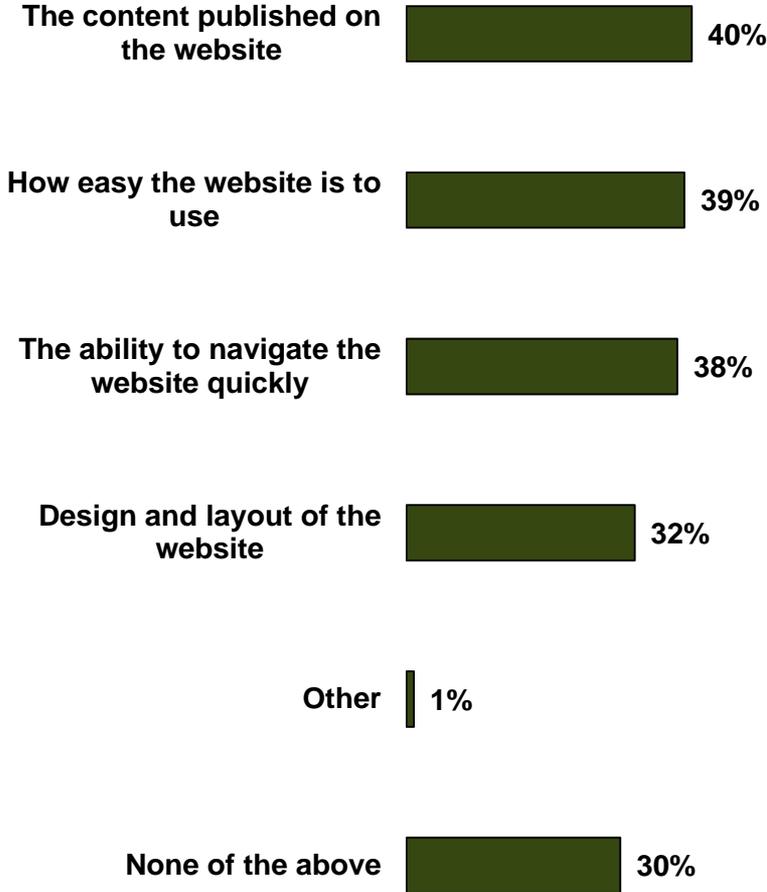
6%

When did you last visit the following websites...

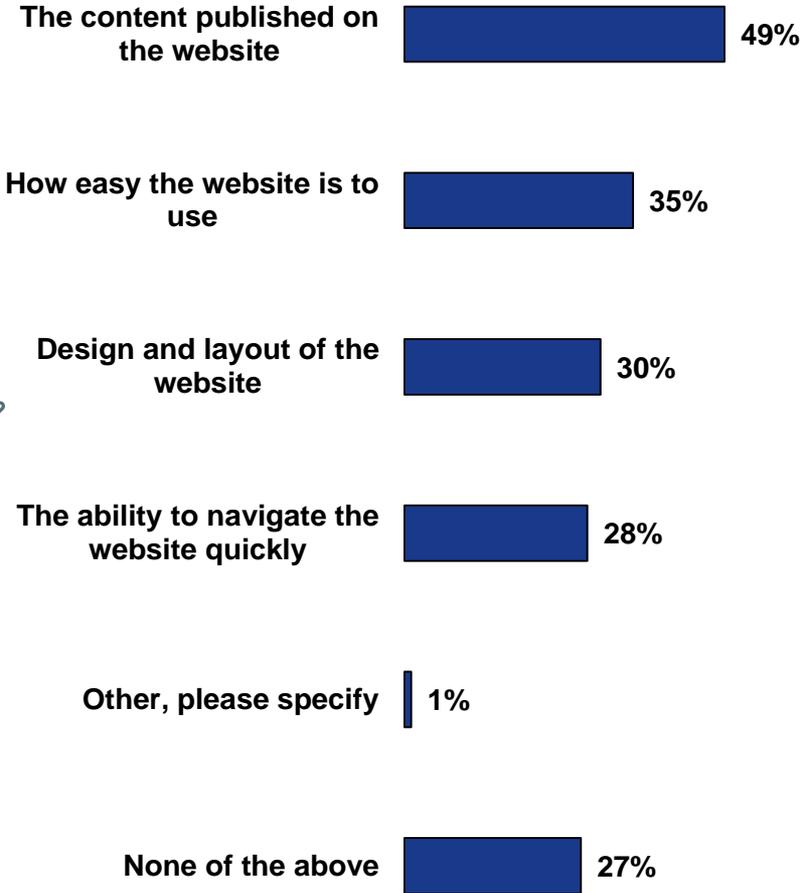
[ Base: All Invest NI customers n=320 ]

The content published was the aspect most favoured by users for both websites.

www.investni.com



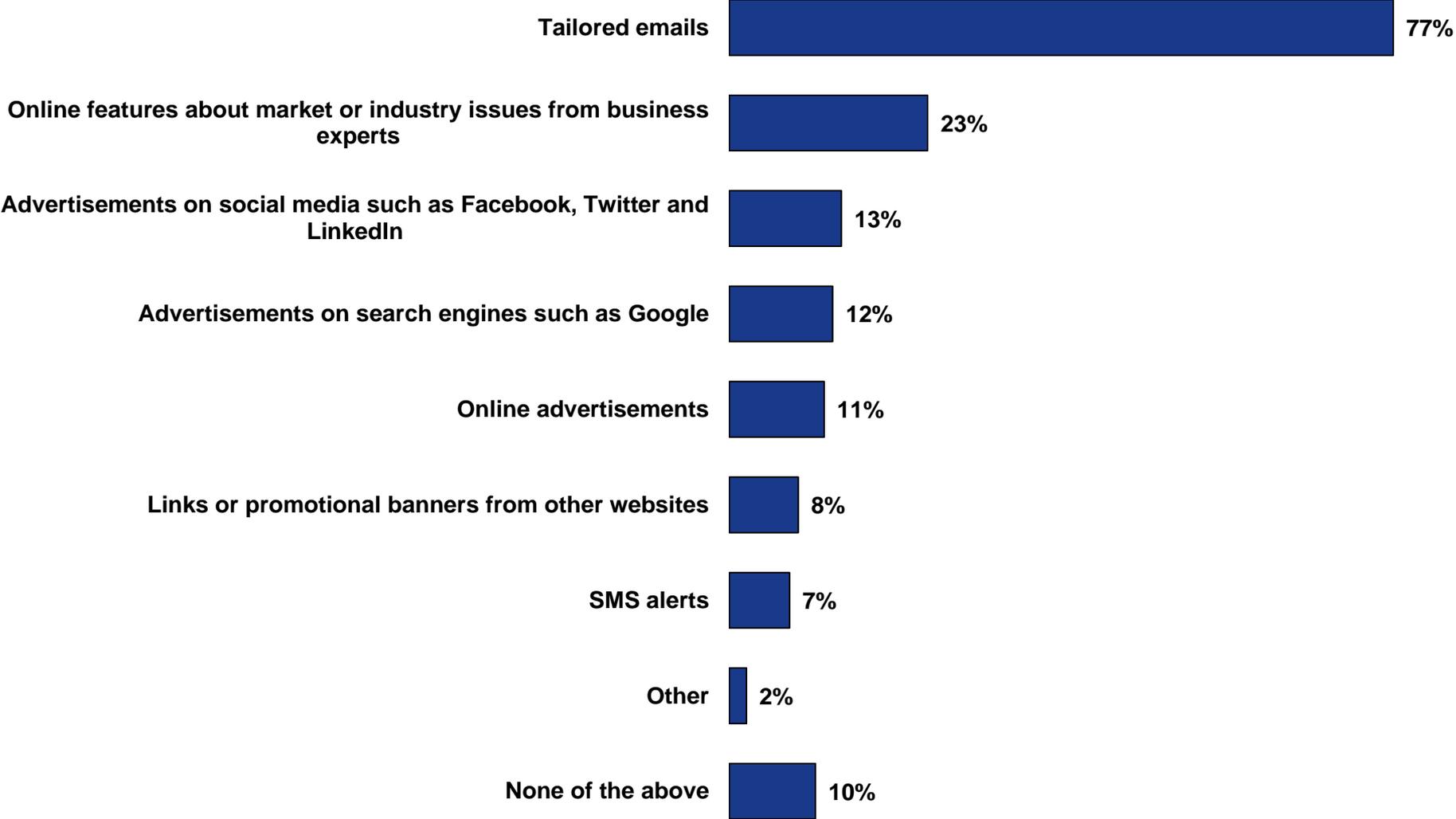
nibusinessinfo.co.uk



Which of the following aspects did you particularly like about the website?

[ Base: All who used either website n=133, n=79]

Tailored emails were, by far, considered the most likely method of encouraging them to visit the websites.



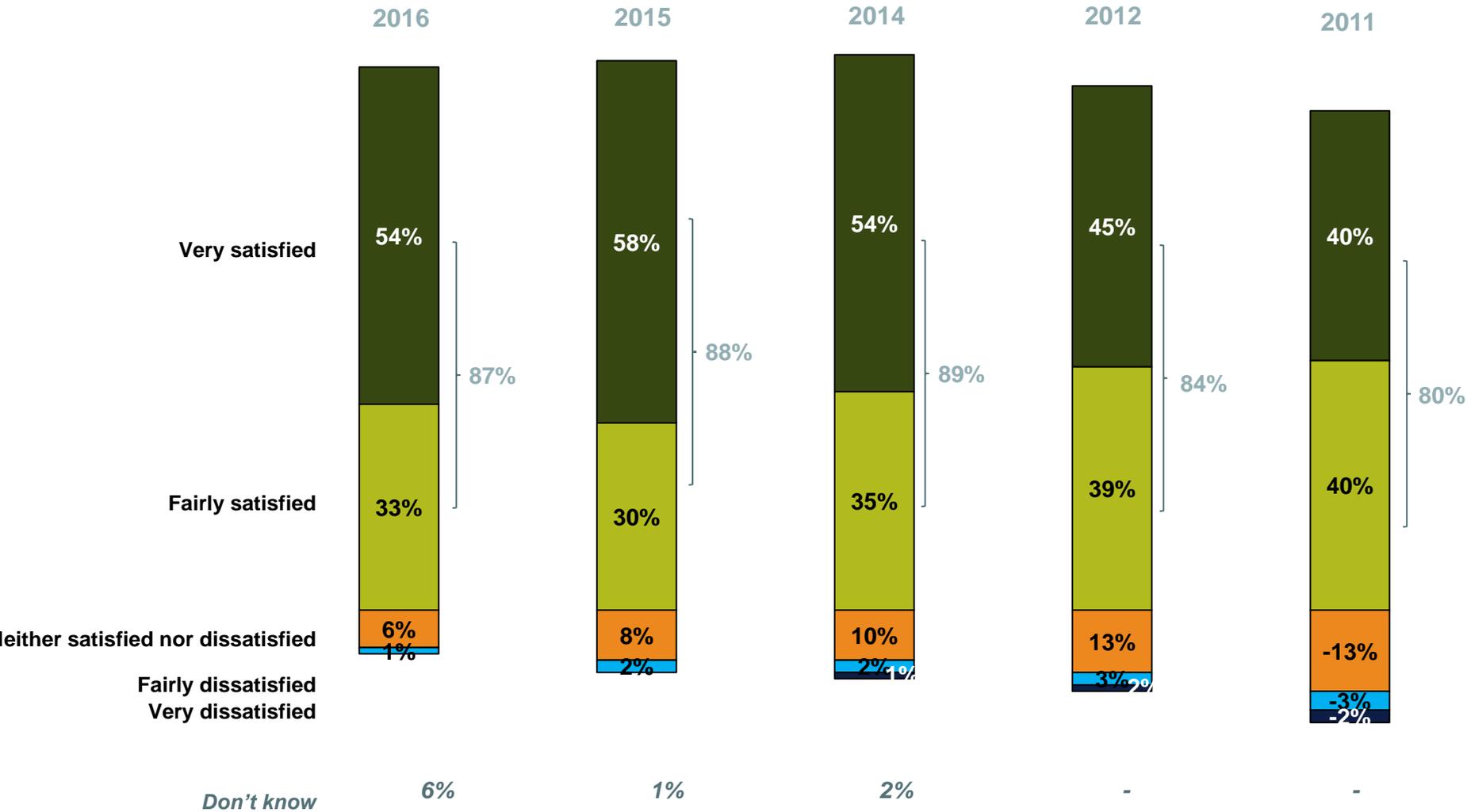
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# Overall satisfaction with the team of people worked with was fairly on par with 2015.

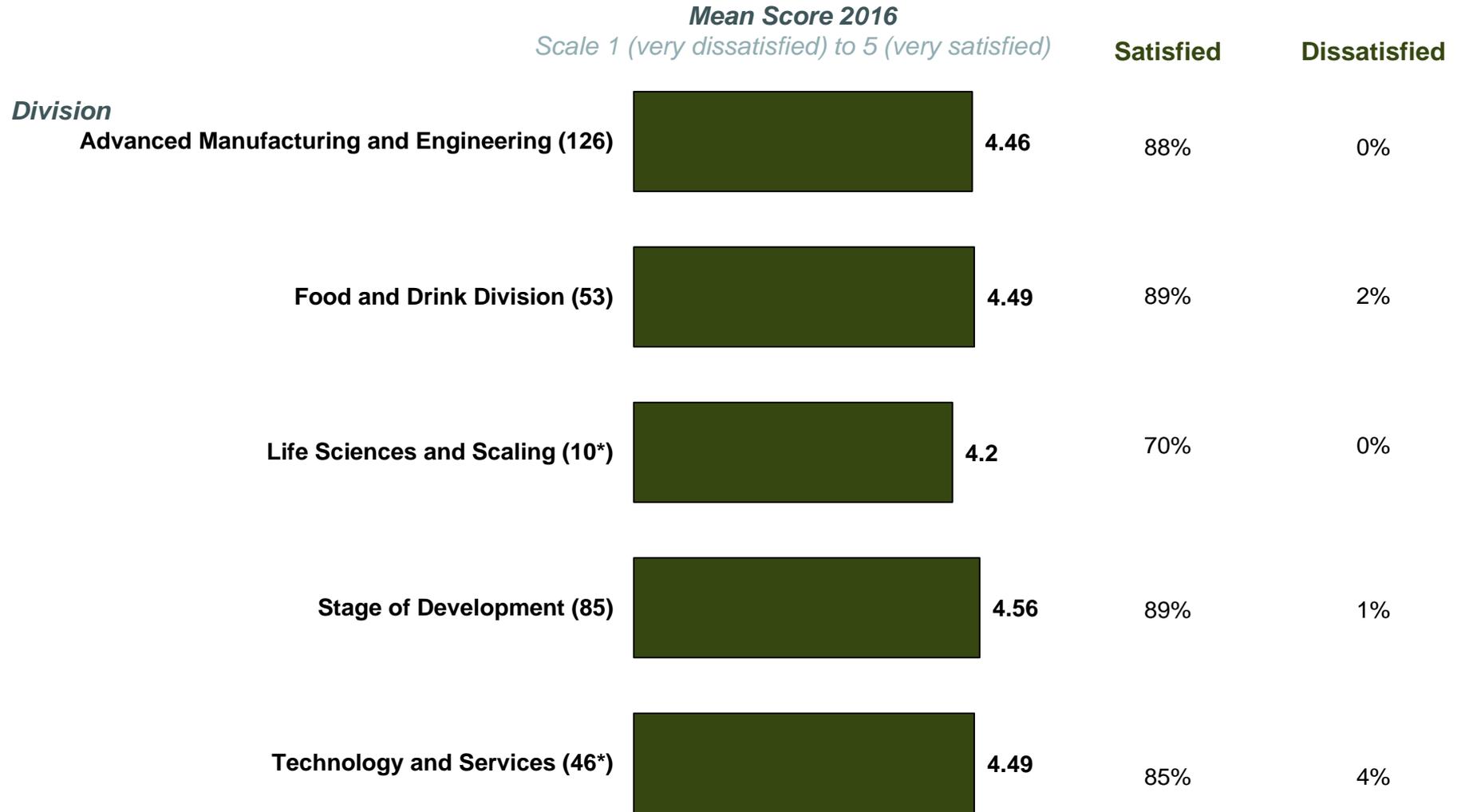
## Satisfaction with Invest NI team



Overall, how satisfied or dissatisfied are you with the service provided by the team of people you have been working with at Invest NI in the last 12 months? [ Base: All Invest NI customers n=320 ]

Satisfaction with the team of people they work with was high across all divisions. The division that achieved the highest mean score was the Stage of Development division. *Sample size for Life Sciences and Scaling was too small to draw any conclusions from.*

Satisfaction with team by division



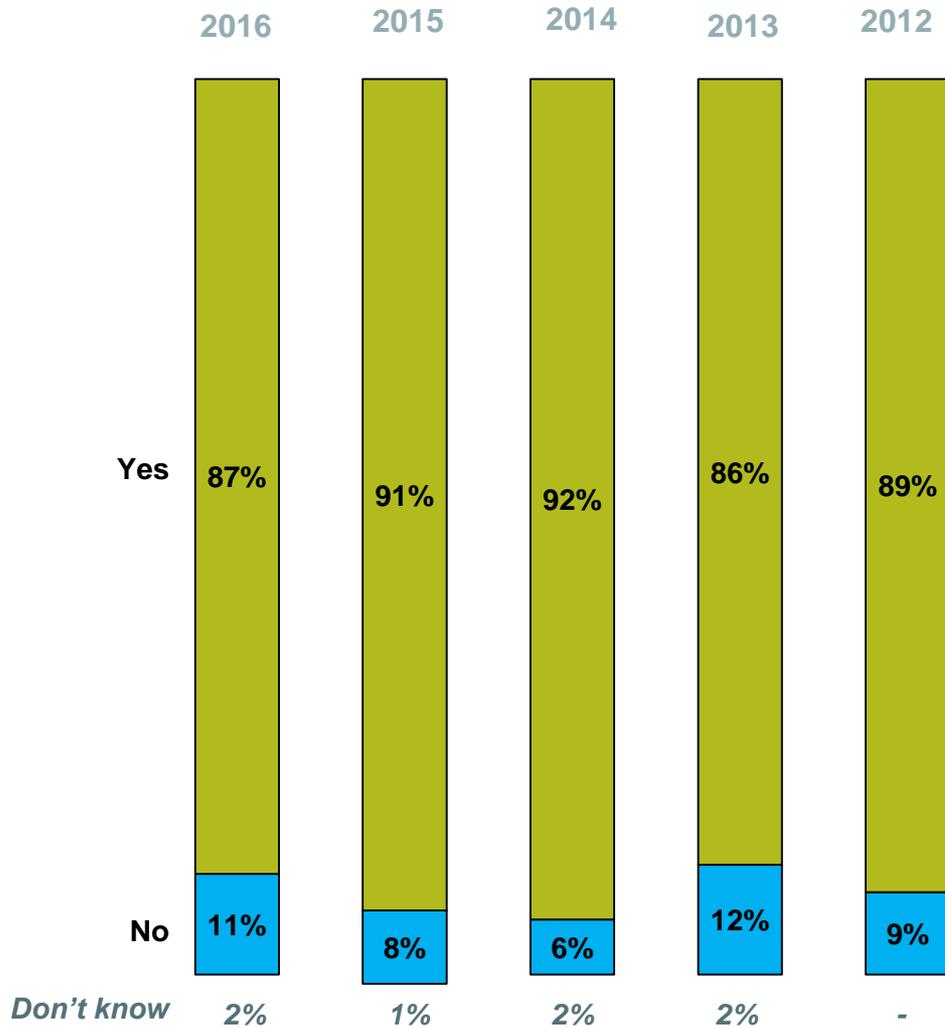
Base size in brackets

Overall average: 4.49

Overall, how satisfied or dissatisfied are you with the service provided by the team of people you have been working with at Invest NI in the last 12 months?

\*Small Base

Almost 9 in 10 customers had been in contact with their direct liaison in the last 12 months, with the most common frequency being at least every 3 months.



Have you met with your company's main contact within Invest NI in the last 12 months?

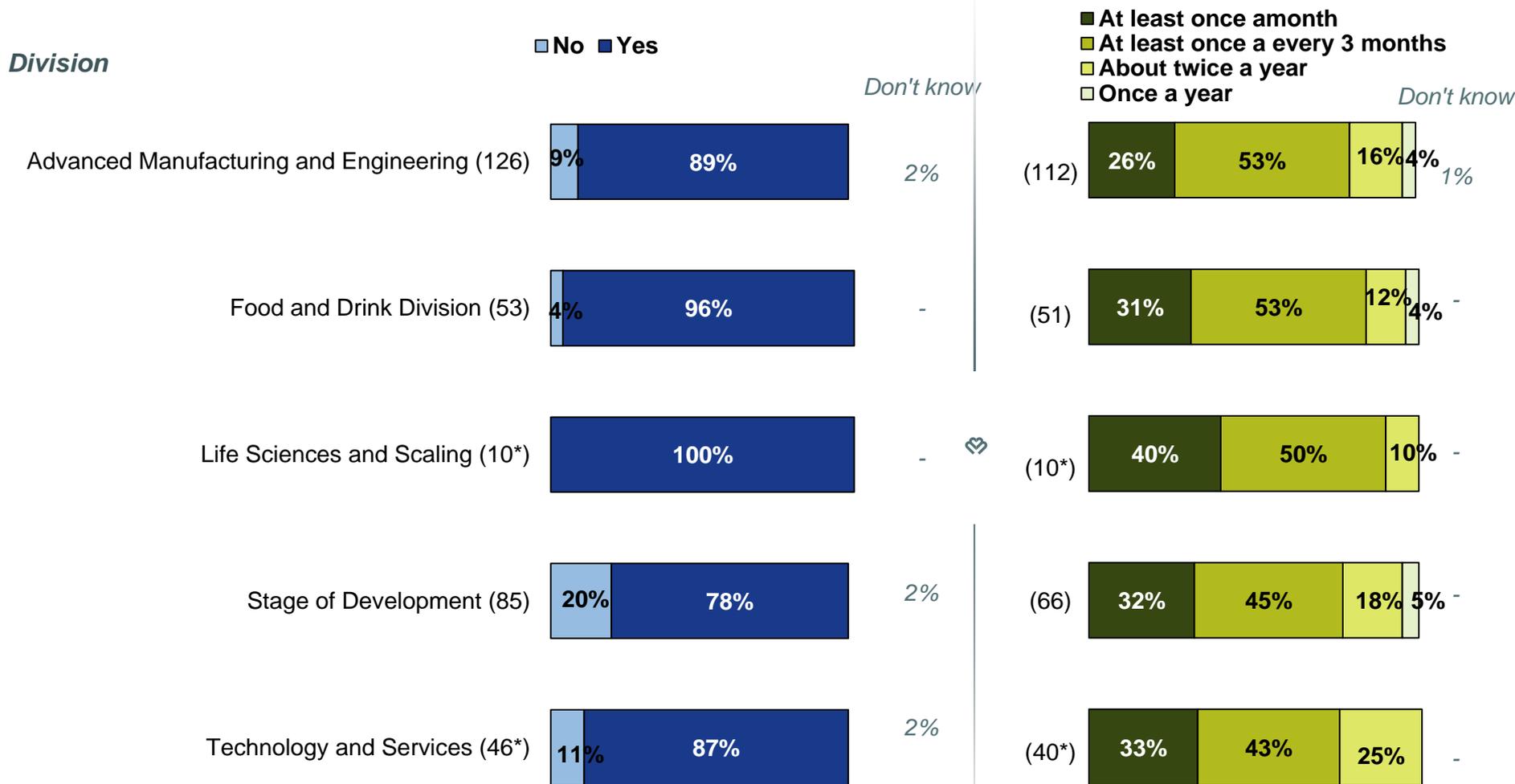
[ Base: All Invest NI customers n=320 ]

How proactive has your main contact been communicating with you over the last year?

[ Base: All in contact over last 12 months n=279 ]

In terms of contact with their direct liaison, 1 in 5 Stage of Development customers claimed to have not had any direct contact in the last 12 months. Proactivity can vary across division, however the majority of customers were being contacted at least once every 3 months.

Contact intensity with main contact by segments



Base size in brackets

Have you had any direct liaison with your company's main contact within Invest NI in the last 12 months?

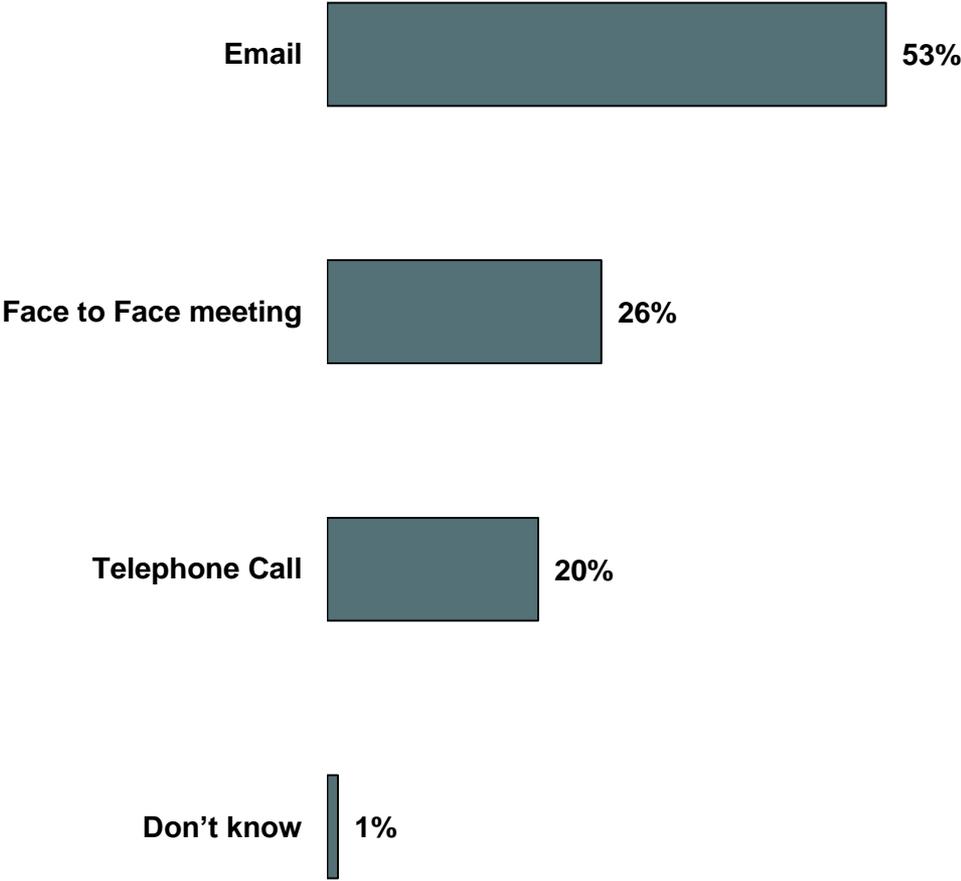
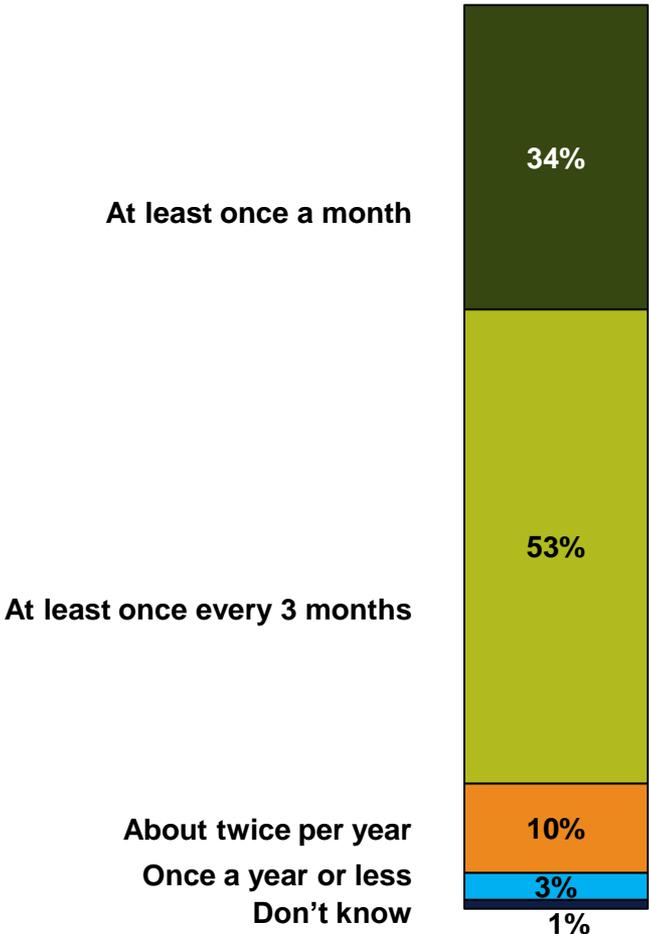
[ Base: All Invest NI customers n=320 ]

How proactive has your main contact been communicating with you over the last year?

[ Base: All with main contact n=279 ]

At least once every 3 months was preferred frequency of contact for the majority, with the largest proportion citing email as their preferred method of communication.

Ideal Frequency and preferred method of Contact



What would be your ideal frequency of communication with your main contact?

[ Base: All with main contact n=279 ]

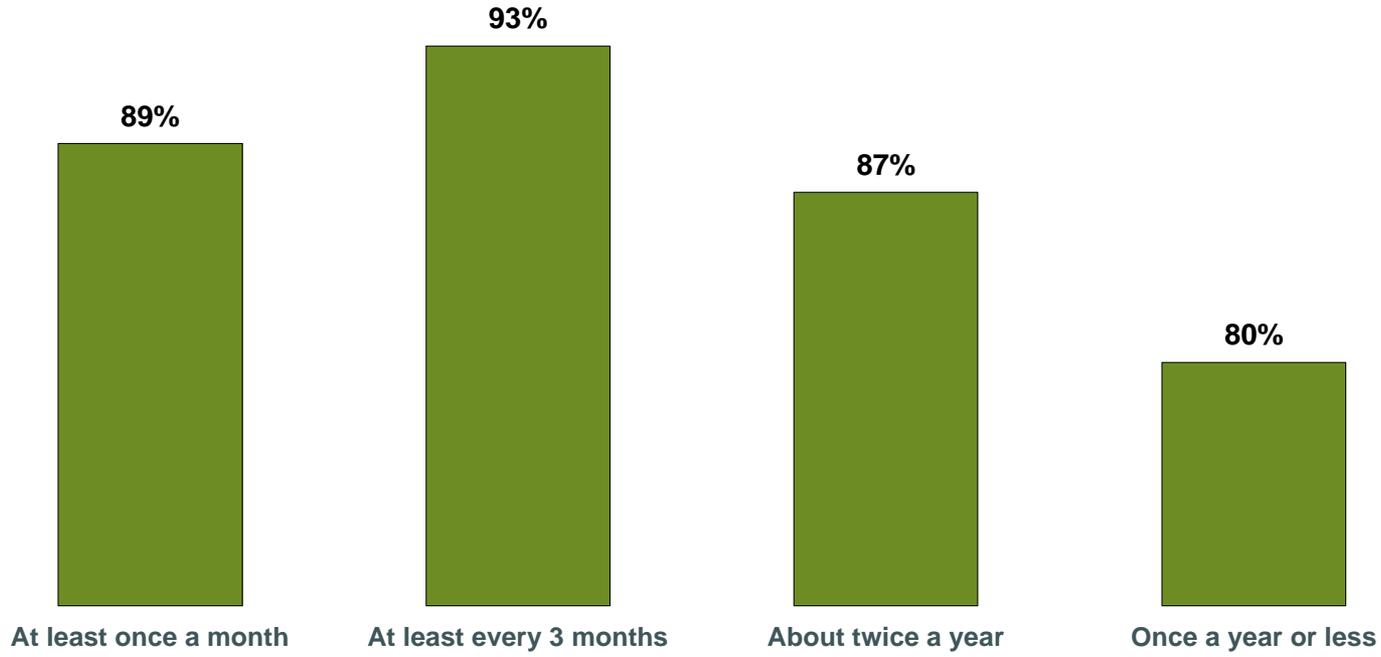
What would be your preferred method of communication?

[ Base: All with main contact n=279 ]

More frequent contact of at least every 3 months can be correlated with higher levels of satisfaction with the Invest NI team. However, contacting customers more than once a quarter will not necessarily improve satisfaction levels.

Customer satisfaction by contact intensity

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



Overall, how satisfied or dissatisfied are you with the service provided by the team of people you have been working with at Invest NI in the last 12 months?

[ Base: All Invest NI customers n=320 ]

Although overall satisfaction remained high across the attributes for the main contact, the trends experienced marginal declines on 2015 scores. Satisfaction levels were highest with the main contacts trustworthiness and responsiveness.

Satisfaction with aspects regarding main contact

Mean Score 2016

Scale 1 (Very dissatisfied) to 5 (Very satisfied)

	Mean Score 2016	Mean Scores				Satisfied					Dissatisfied				
		2015	2014	2013	2012	2016	2015	2014	2013	2012	2016	2015	2014	2013	2012
Invest NI advisor trustworthy	4.57	4.66	4.69	4.55	4.61	92%	94%	95%	94%	93%	2%	1%	-	1%	1%
Responsiveness	4.42	4.53	4.47	4.31	4.25	87%	90%	90%	87%	82%	3%	1%	2%	3%	4%
Proactivity	4.31	4.41	4.32	4.07	3.97	82%	86%	85%	77%	69%	3%	5%	5%	7%	8%
Knowledge about your business	4.29	4.41	4.22	4.16	4.05	85%	86%	83%	82%	71%	4%	1%	1%	5%	6%
Ability to offer tailored solutions	4.14	4.32	4.13	-	-	77%	81%	77%	-	-	6%	3%	5%	-	-
Worked with me to put a business plan in place	4.06	4.07	4.07	4.01	-	64%	63%	60%	63%	-	10%	11%	8%	10%	-

Satisfaction with main contact's performance?

[ Base: All who have had contact n=279 ]

On the whole, main contacts made it clear how Invest NI can assist the business and provide realistic timelines.

Expectancy management and timescale planning

Your main contact ...

**Mean Score 2016**

Scale 1 (strongly disagree) to 5 (strongly agree)

**... makes it clear from the outset if and how Invest NI could assist your business**  **4.43**

**... discusses and agrees realistic timescales for planned activities**  **4.36**

Mean Scores					Agree					Disagree				
2015	2014	2013	2012	2016	2015	2014	2013	2012	2016	2015	2014	2013	2012	
4.42	4.44	4.33	4.3	88%	86%	89%	88%	83%	2%	4%	3%	4%	3%	
4.42	4.35	4.24	4.21	83%	85%	80%	80%	80%	4%	5%	4%	5%	4%	



Agreement ...

[ Base: All who have had contact n=279 ]

# Agenda

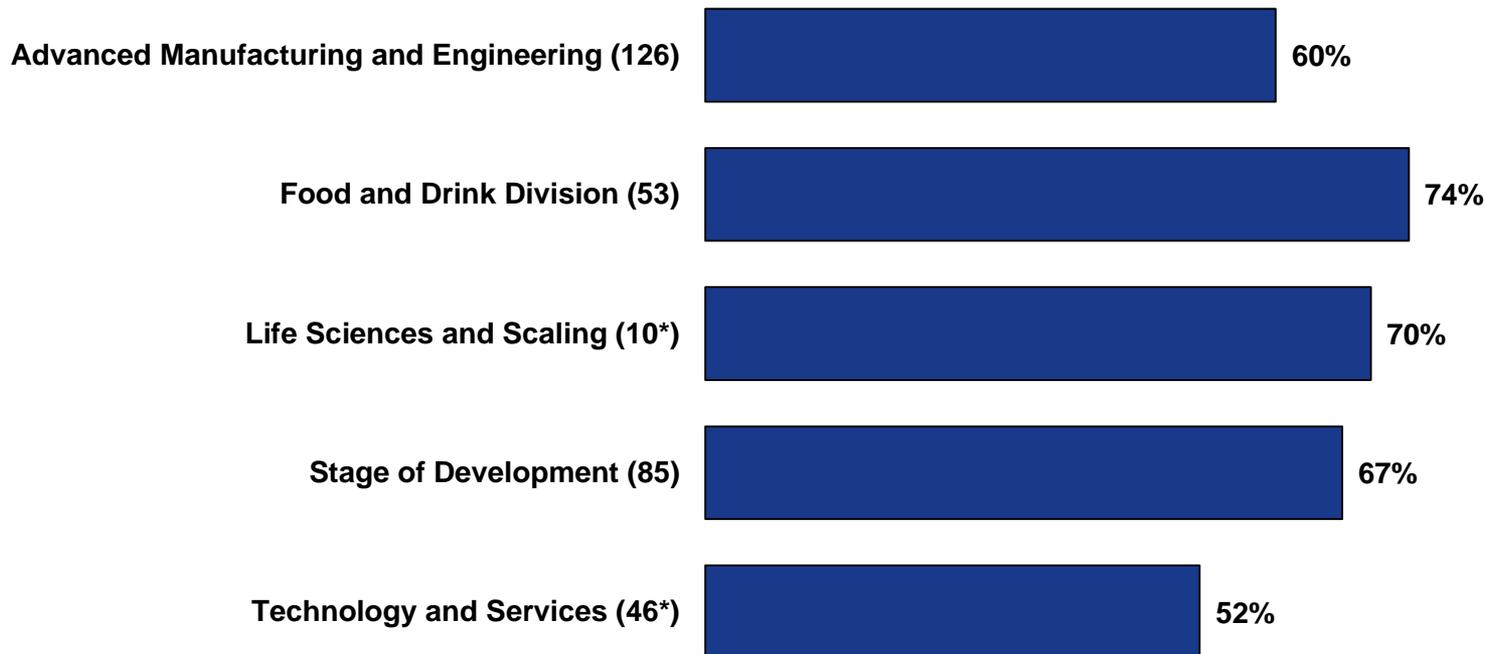
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- Study Set-up
- Overall Satisfaction, Familiarity and Advocacy
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- Financial assistance and claims process
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- Suggested Improvements

Food and Drink, and Stage of Development customers were most likely to have sought support.  
*Sample size for Life Sciences and Scaling was too small to draw any conclusions from.*



**Division**



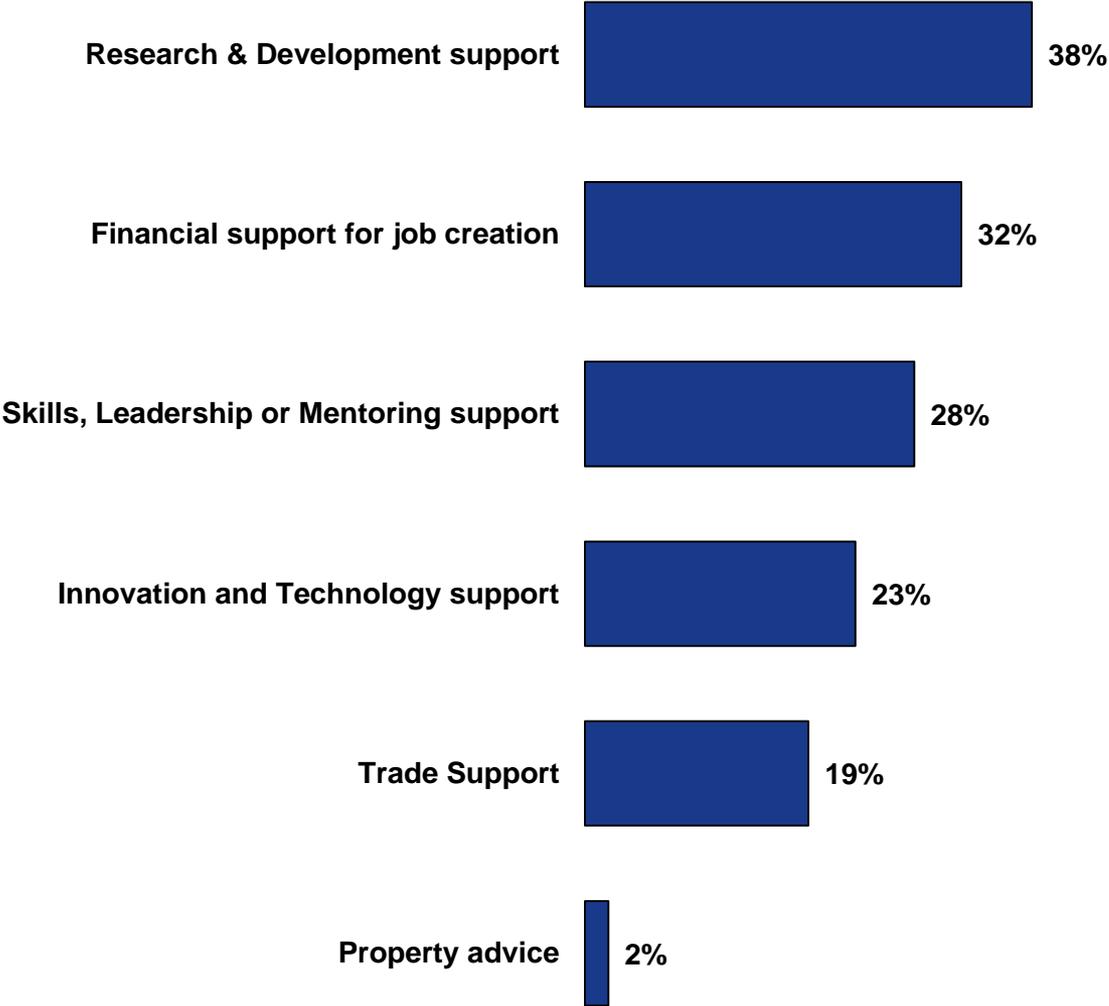
*Base size in brackets*

Did you access any Invest NI support this year?

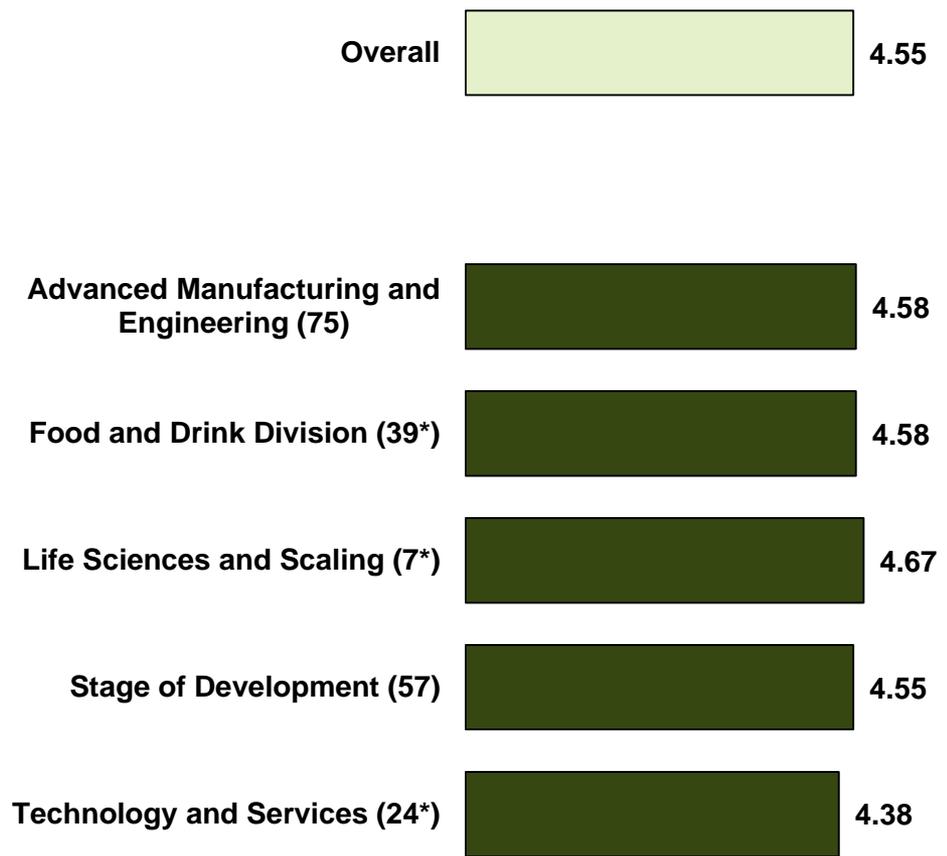
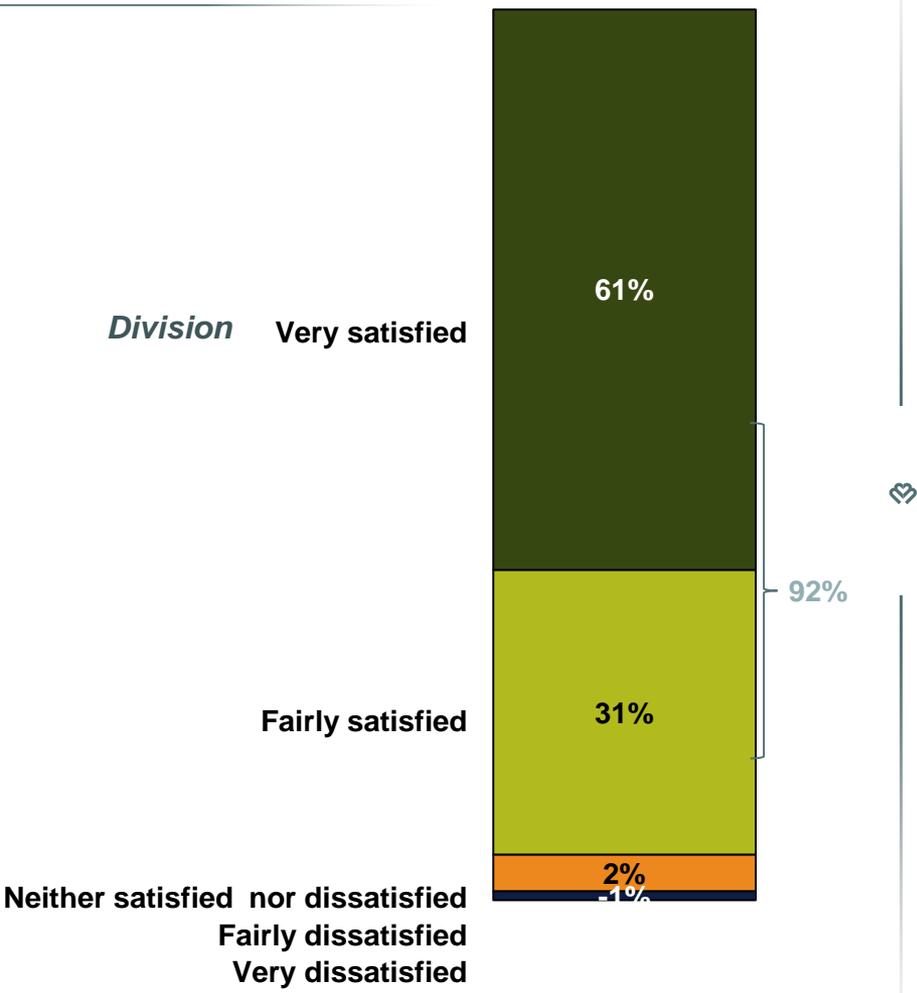
[ Base: All Invest NI customers n=320 ]

*\*Small Base*

The most commonly utilised support areas were research and development support and financial support for job creation.



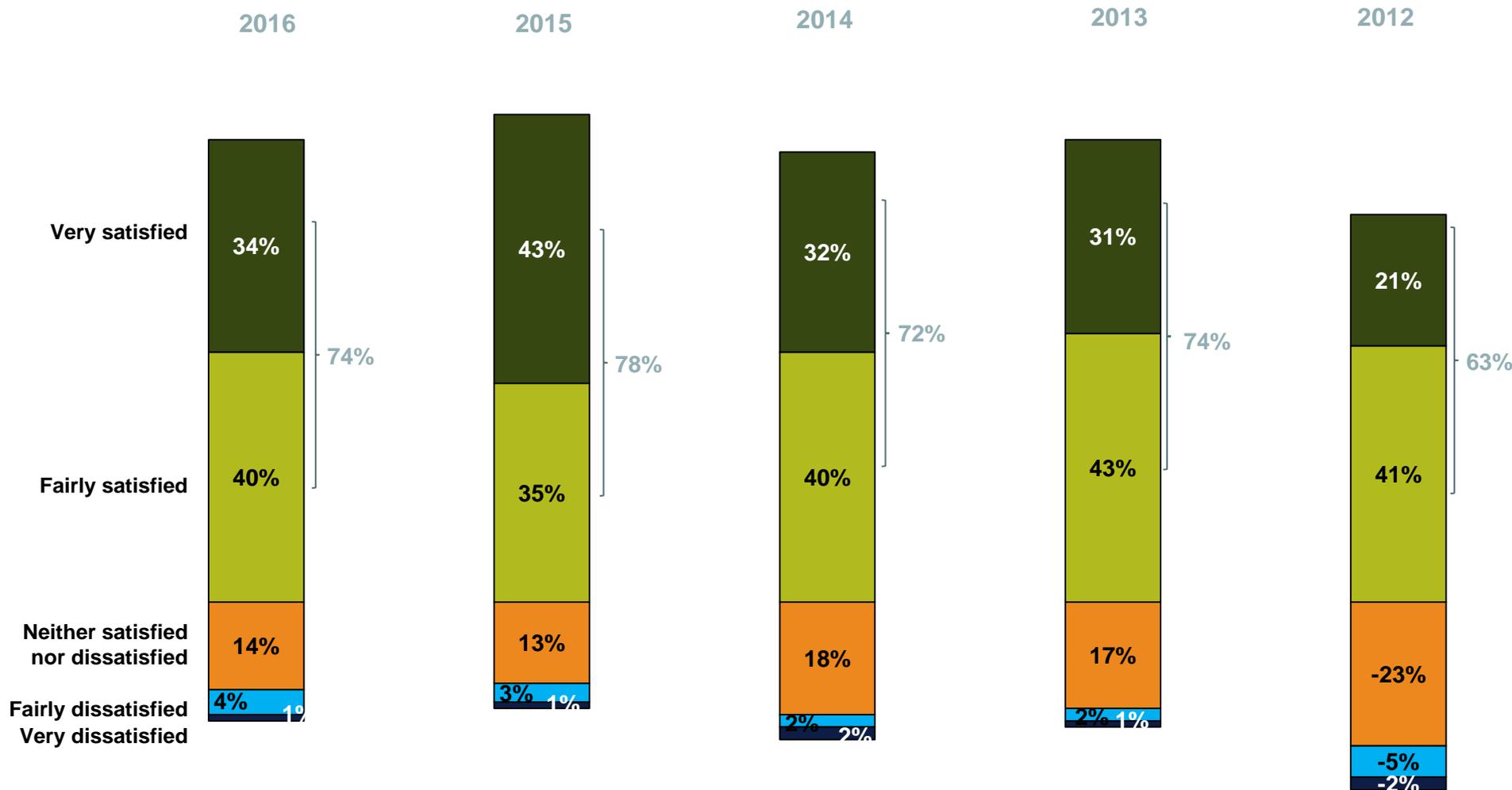
There was high levels of satisfaction with the support received, with the largest proportion very satisfied.



Base size in brackets

The level of satisfaction with the quality of programmes and advisory services had declined since 2015 and was more on par with 2013/2014 findings.

Satisfaction with quality of programmes & advisory services



How satisfied or dissatisfied are you with the quality of programmes and advisory services offered by Invest NI? [ Base: All Invest NI customers n=320 ]

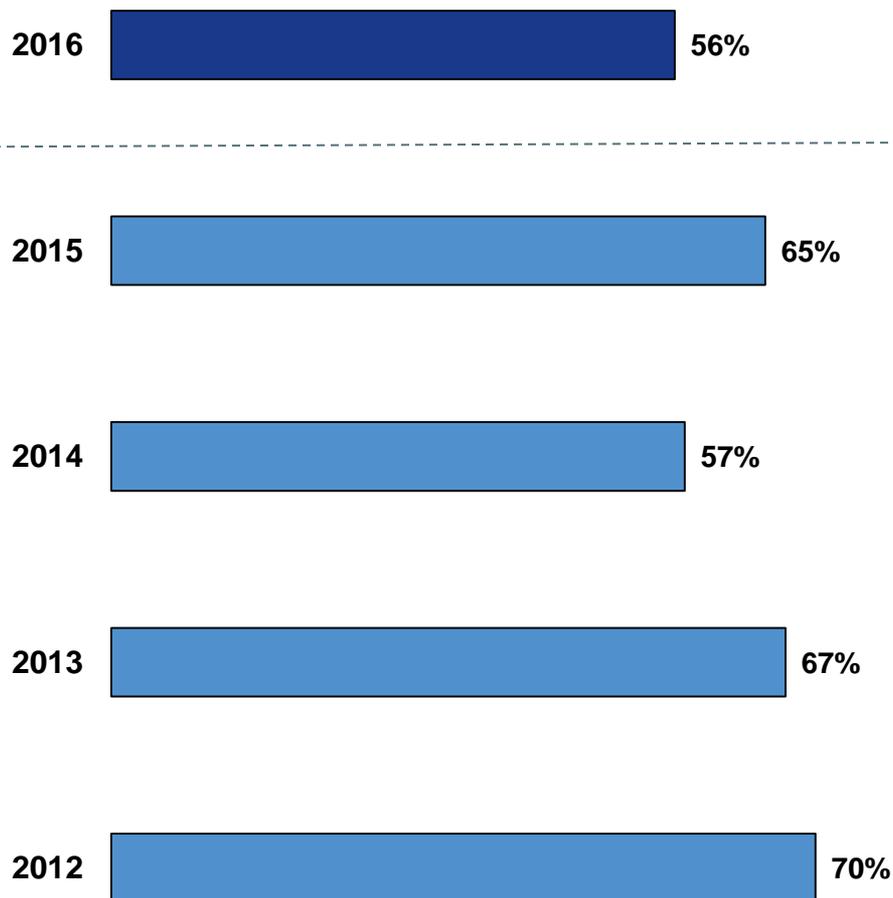
# Agenda

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The proportion of customers in 2016 who had sought financial assistance to help expand or develop their business was down on 2015 and more in line with 2014 figures.

Seeking financial assistance by year

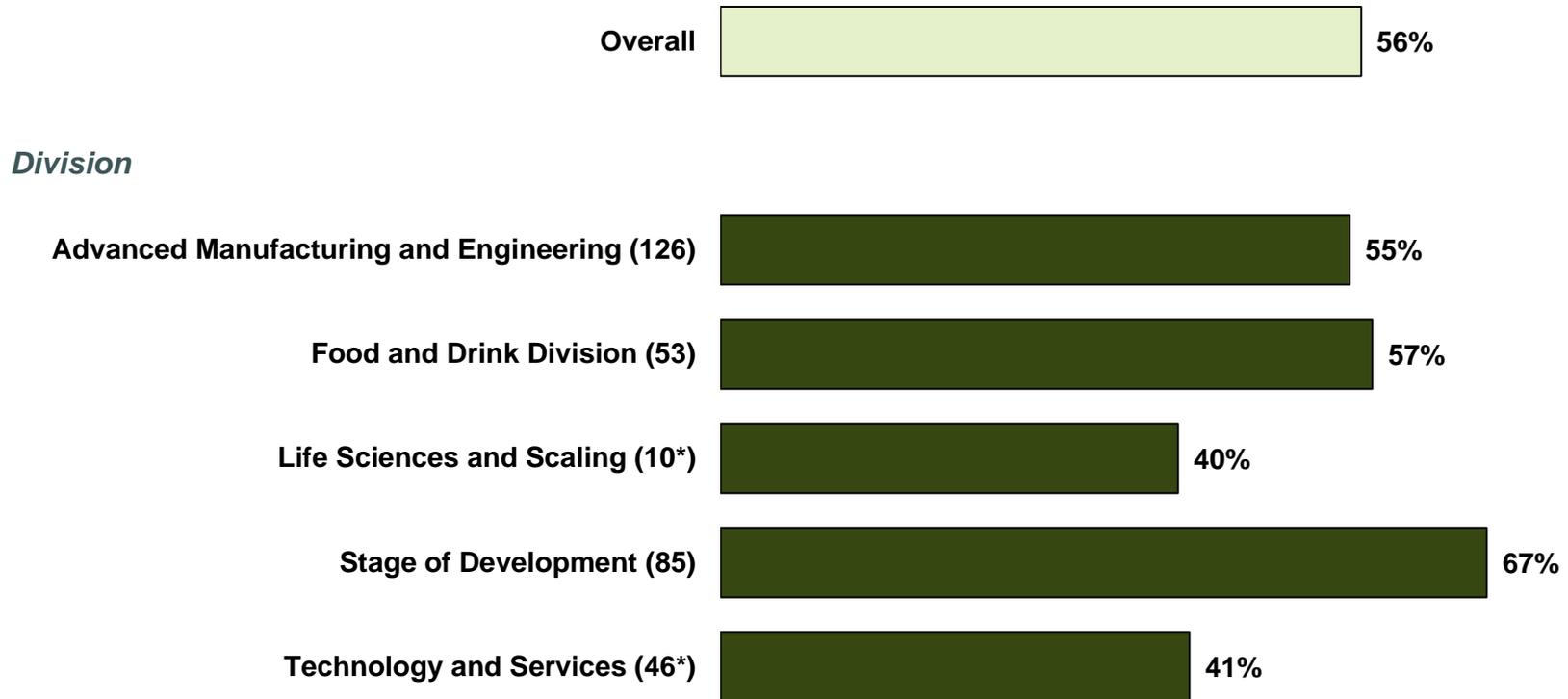


Have you sought financial assistance in the past 12 months to help you expand or develop your business (includes Growth Accelerator Programme)?

[ Base: All Invest NI customers n=320 ]

Stage of Development customers were much more likely to have sought financial assistance in 2016. *Sample size for Life Sciences and Scaling was too small to draw any conclusions from.*

### 2016 seeking financial assistance by division



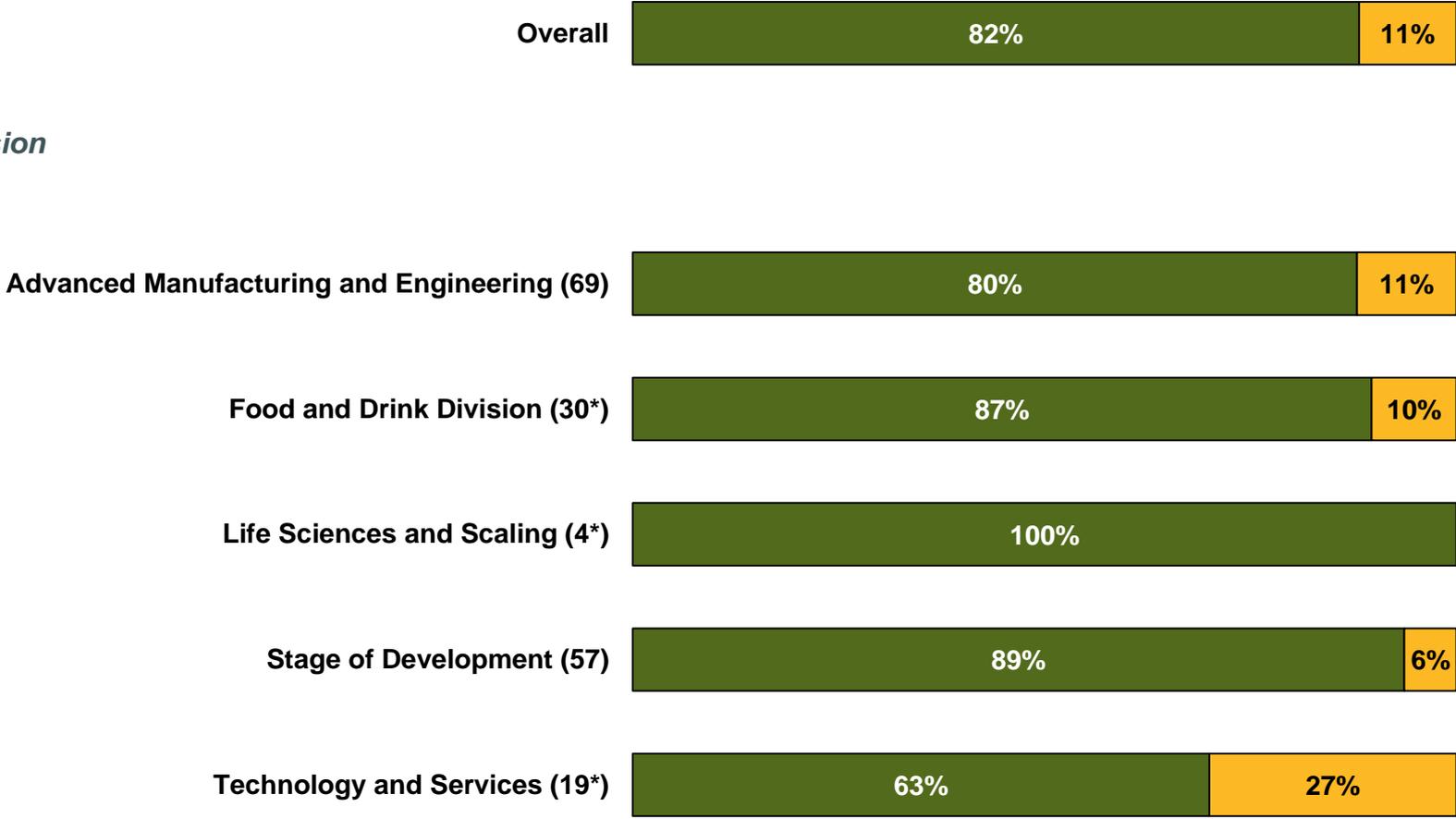
*Base size in brackets*

On average, around 4 in 5 customers seeking assistance sought levels of financial assistance less than £100,000. Albeit the base is small, over a quarter of the technology and services division customers sought financial assistance of over £100,000

Amounts applied for by division - 2016

■ Less than £100,000 ■ £100,000+

Division



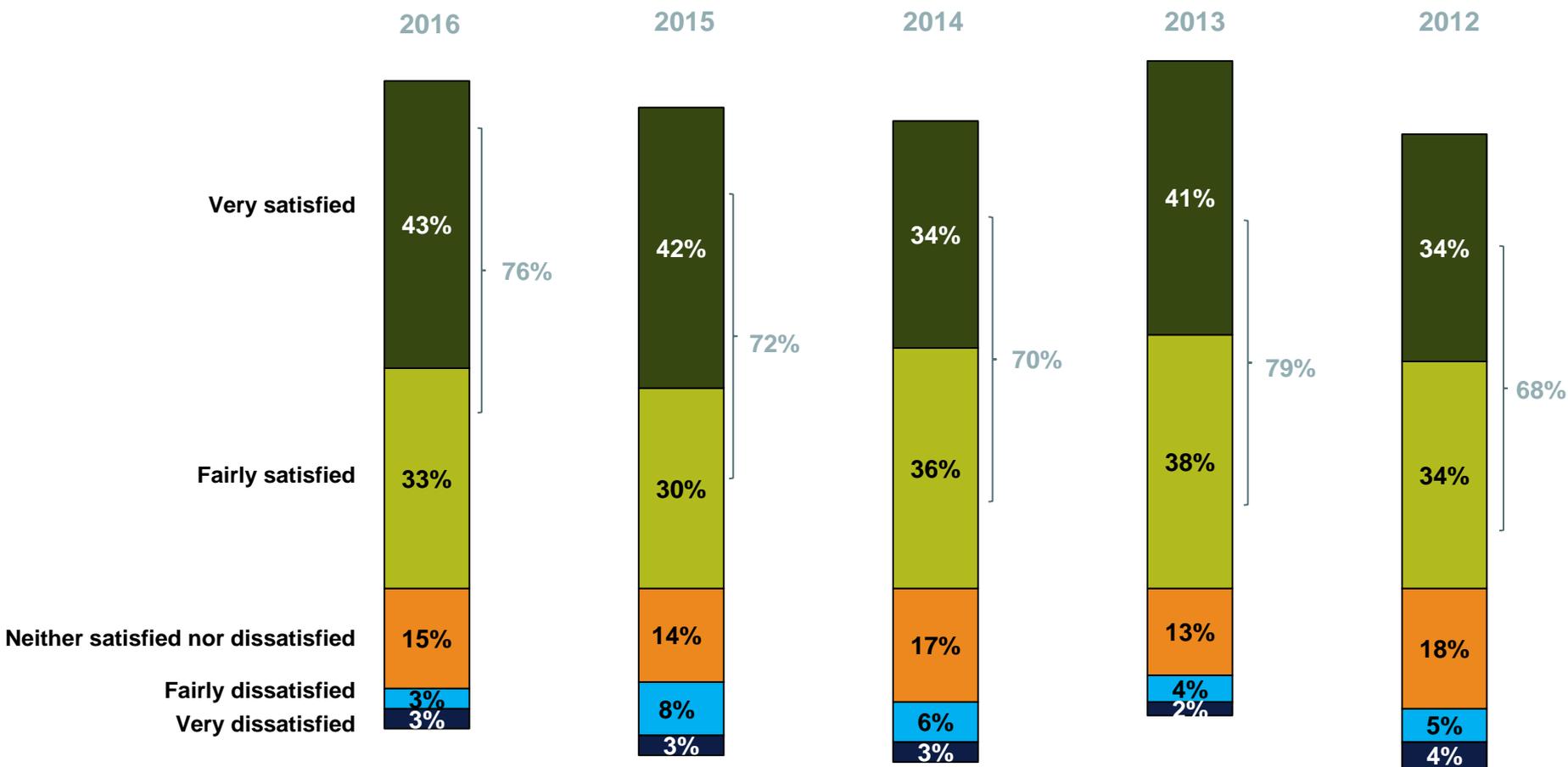
How much was the amount you sought?

[ Base: All Invest Northern Ireland customers who have applied for financial assistance in the last 12 months n=179 ]

\*Small Base

There has been an upward trend in relation to satisfaction with the application process since 2014.

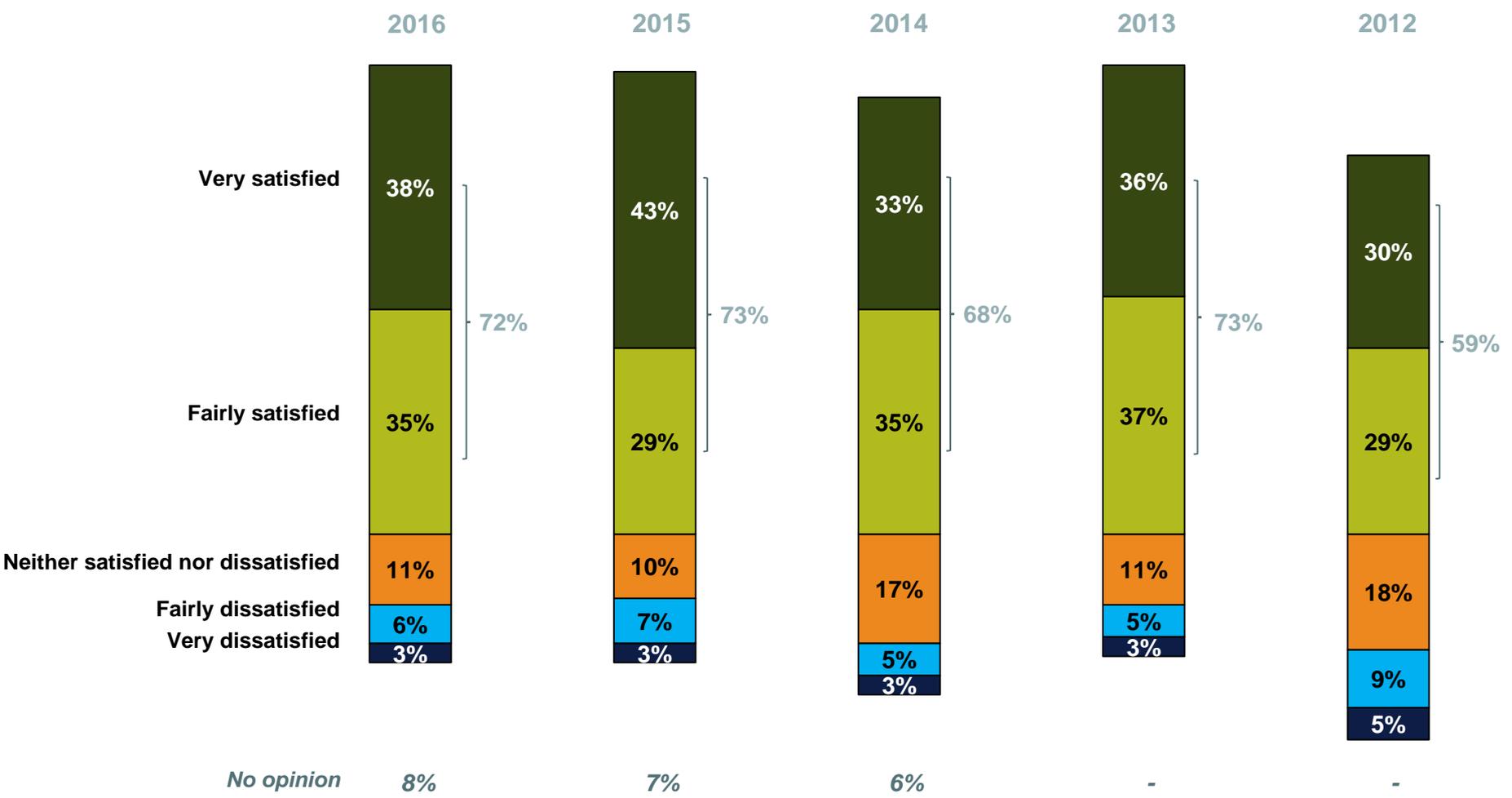
### Satisfaction with application process



How satisfied or dissatisfied were you with the following aspects of applying for financial assistance – the application process? [Base: All Invest Northern Ireland customers who have applied for financial assistance in the last 12 months n=179]

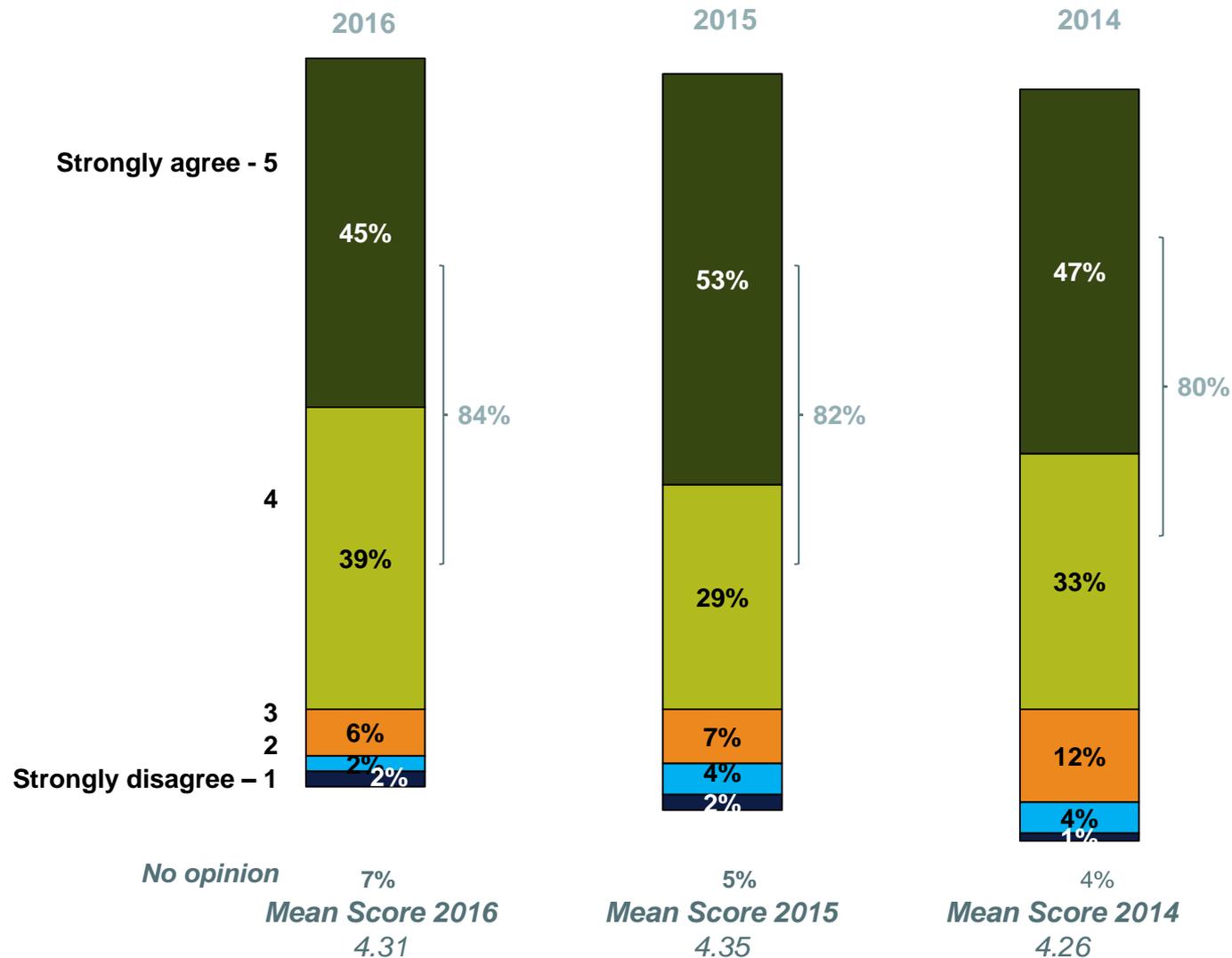
With over 7 in 10 satisfied with the application approval time, satisfaction levels are in line with 2015 findings.

Satisfaction with funding application approval time



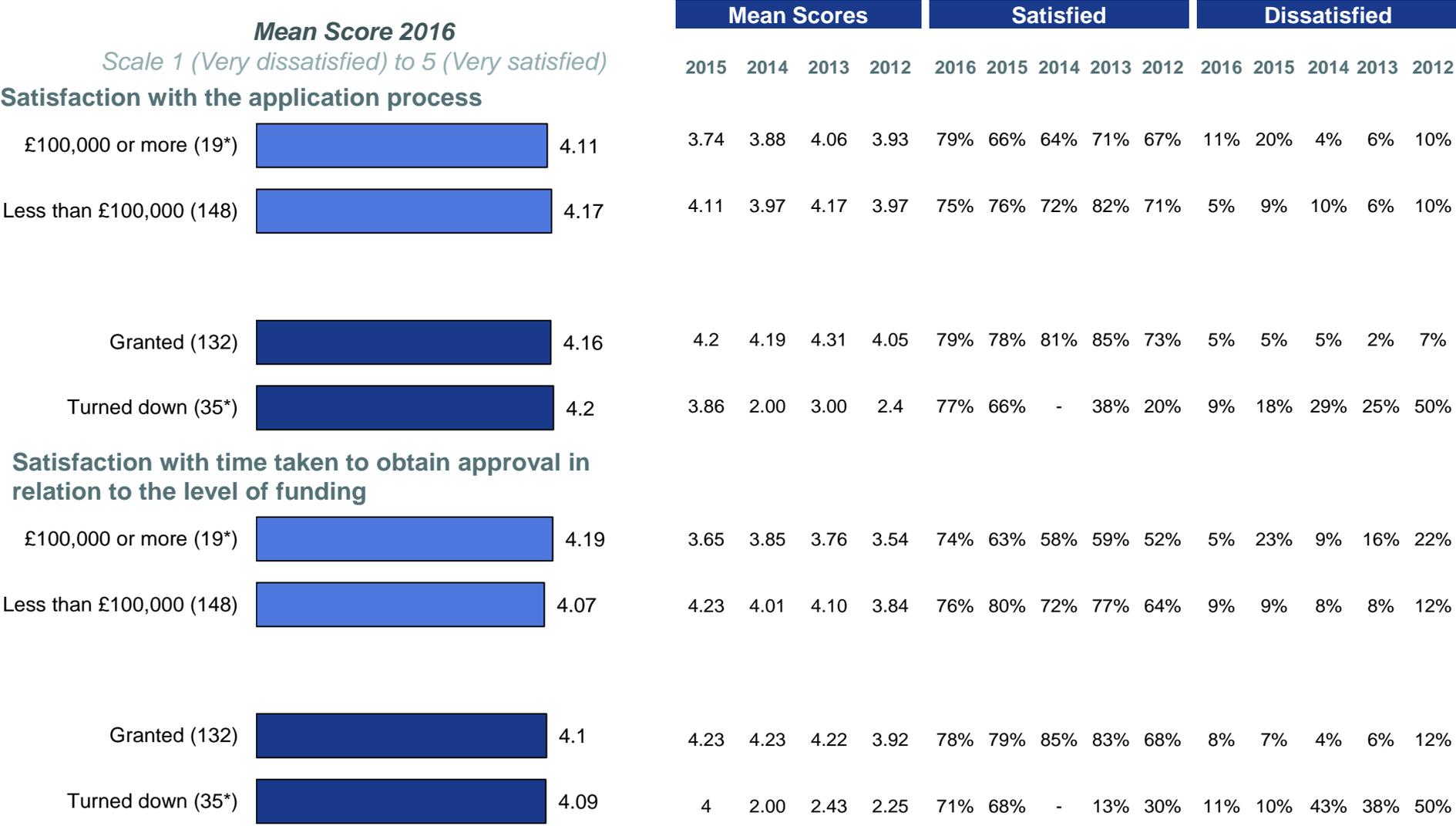
How satisfied or dissatisfied were you with the following aspects of applying for financial assistance – The time taken to obtain approval in relation to the level of funding? [ Base: All Invest Northern Ireland customers who have applied for financial assistance in the last 12 months n=179 ]

There was a marginal increase in overall agreement regarding being kept informed by the Invest NI team of their application, however, the proportion of customers who strongly agreed with this experience a decline.



To what extent do you agree or disagree with each of the following statements about Invest NI - The Invest NI team kept me informed on the progress of my application for support as it went through the approvals process? [ Base: All Invest Northern Ireland customers who have applied for financial assistance in the last 12 months n=179 ]

Unlike previous years when the differences were greater, there was marginal differences in satisfaction levels with both the application process and approval time, between those customers who had their funding granted and those that were turned down.



Levels of satisfaction with *most* aspects of the claims process remained similar to 2015. However, communication with the claims teams experienced a decline in both overall satisfaction and mean score.

Satisfaction with aspects regarding claims process

Mean Score 2016

Scale 1 (Very dissatisfied) to 5 (Very satisfied)

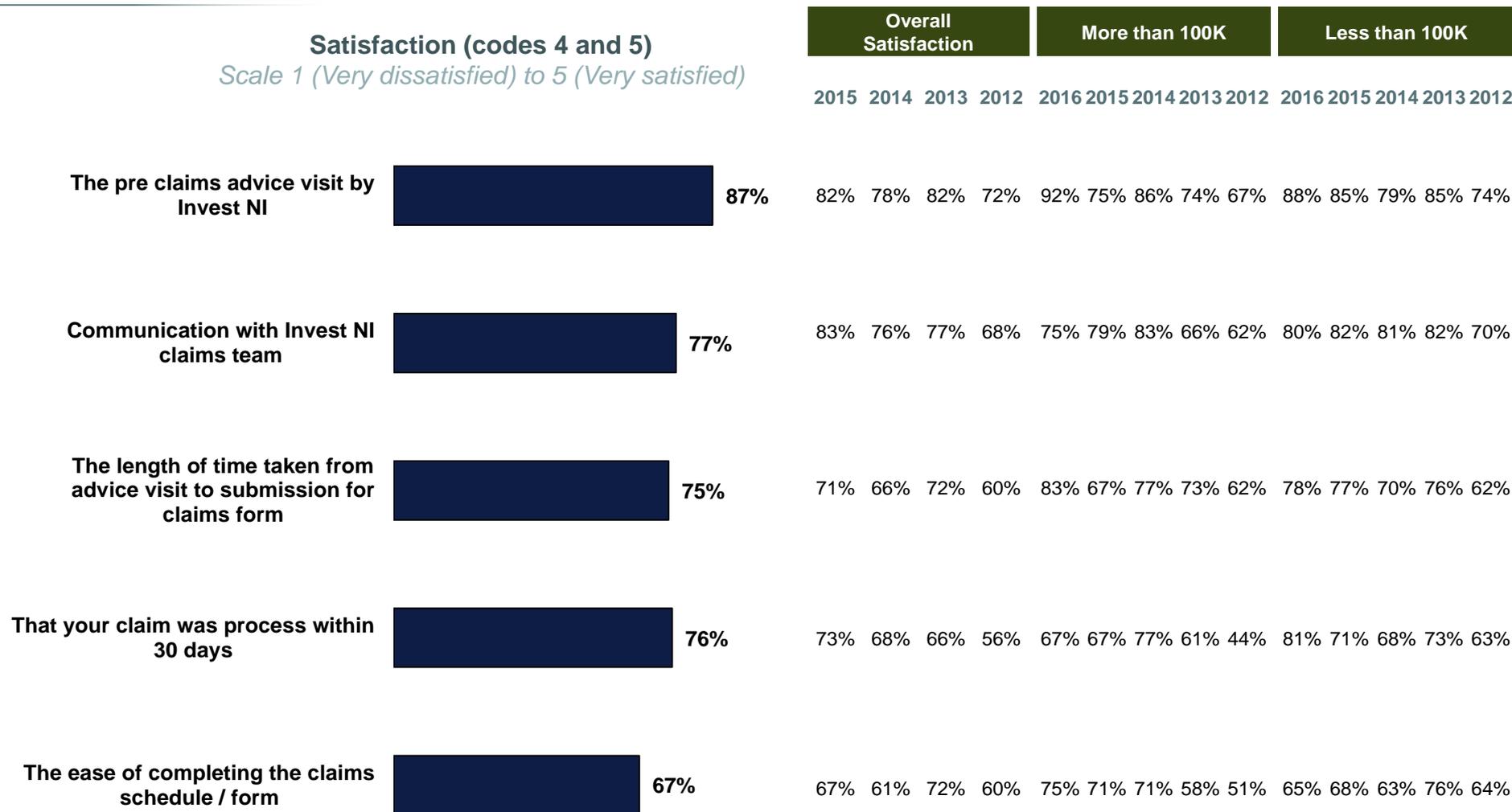
	Mean Score 2016	Mean Scores					Satisfied					Dissatisfied				
		2015	2014	2013	2012	2016	2015	2014	2013	2012	2016	2015	2014	2013	2012	
The pre claims advice visit by Invest NI	4.42	4.4	4.27	4.24	4.13	87%	82%	78%	82%	72%	1%	2%	3%	4%	6%	
Communication with Invest NI claims team	4.24	4.37	4.14	4.14	3.94	77%	83%	76%	77%	68%	7%	5%	6%	6%	11%	
That your claim was process within 30 days	4.2	4.18	4.05	3.89	3.69	76%	73%	68%	66%	56%	9%	10%	10%	14%	18%	
The length of time taken from advice visit to submission of claims form	4.12	4.04	3.93	3.99	3.82	75%	71%	66%	72%	60%	9%	8%	8%	9%	11%	
The ease of completing the claims schedule / form	3.92	3.92	3.73	3.98	3.72	67%	67%	61%	72%	60%	10%	11%	13%	8%	15%	

58 How satisfied or dissatisfied were you with each of the following aspects of the process?

[ Base: All who have sought/claimed funding from Invest NI in the past 12 months n=161 ]

Communication with the claims team experienced higher levels of satisfaction amongst those seeking financial assistance of less than 100K. Satisfaction was also much higher amongst those seeking financial assistance of less than 100K when it came to the processing of their claim within 30 days.

Aspects regarding claims process by amount applied for



59 How satisfied or dissatisfied were you with each of the following aspects of the process?

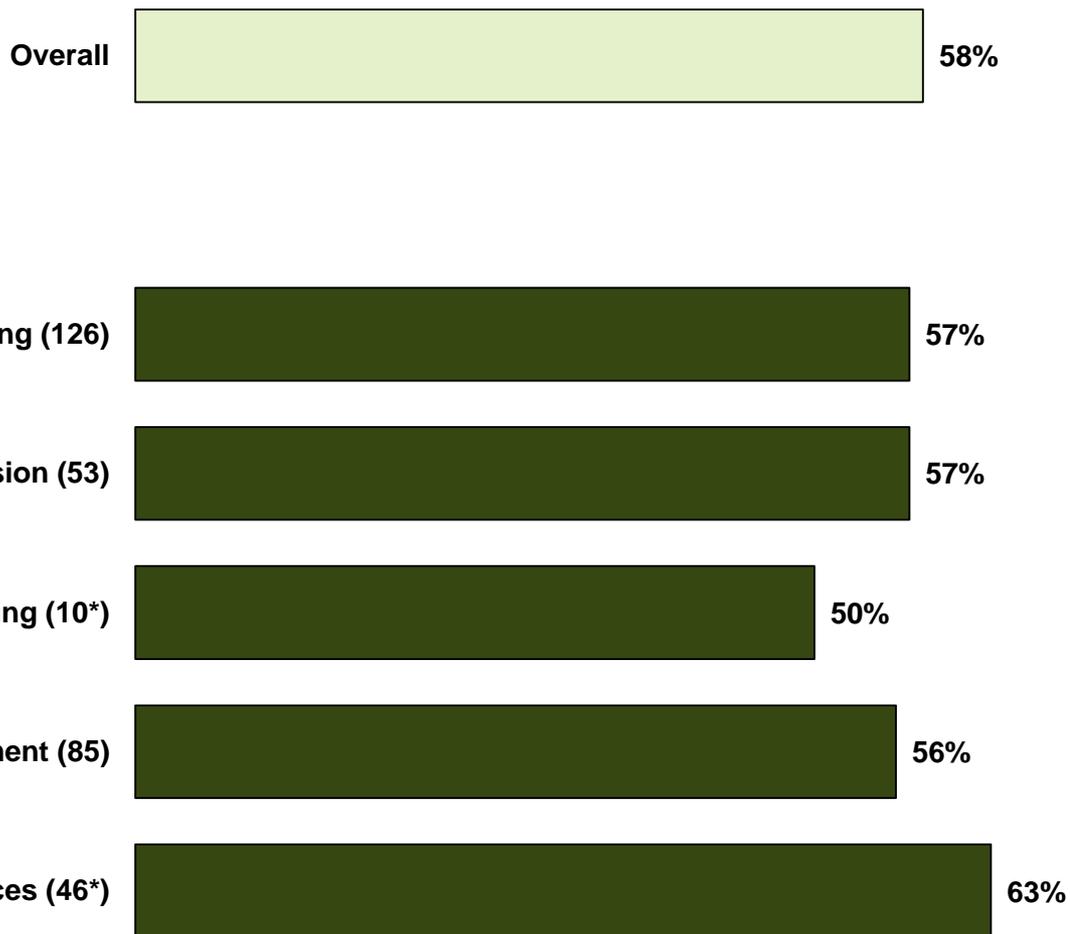
[ Base: All who have sought / claimed funding from Invest NI in the past 12 months n=161 ]

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- **Complaints & Feedback Process**
- Suggested Improvements

Awareness of the complaints and feedback process was highest among Technology and Services customers. Almost 3 in 5 customers were aware of this process.



**Division**

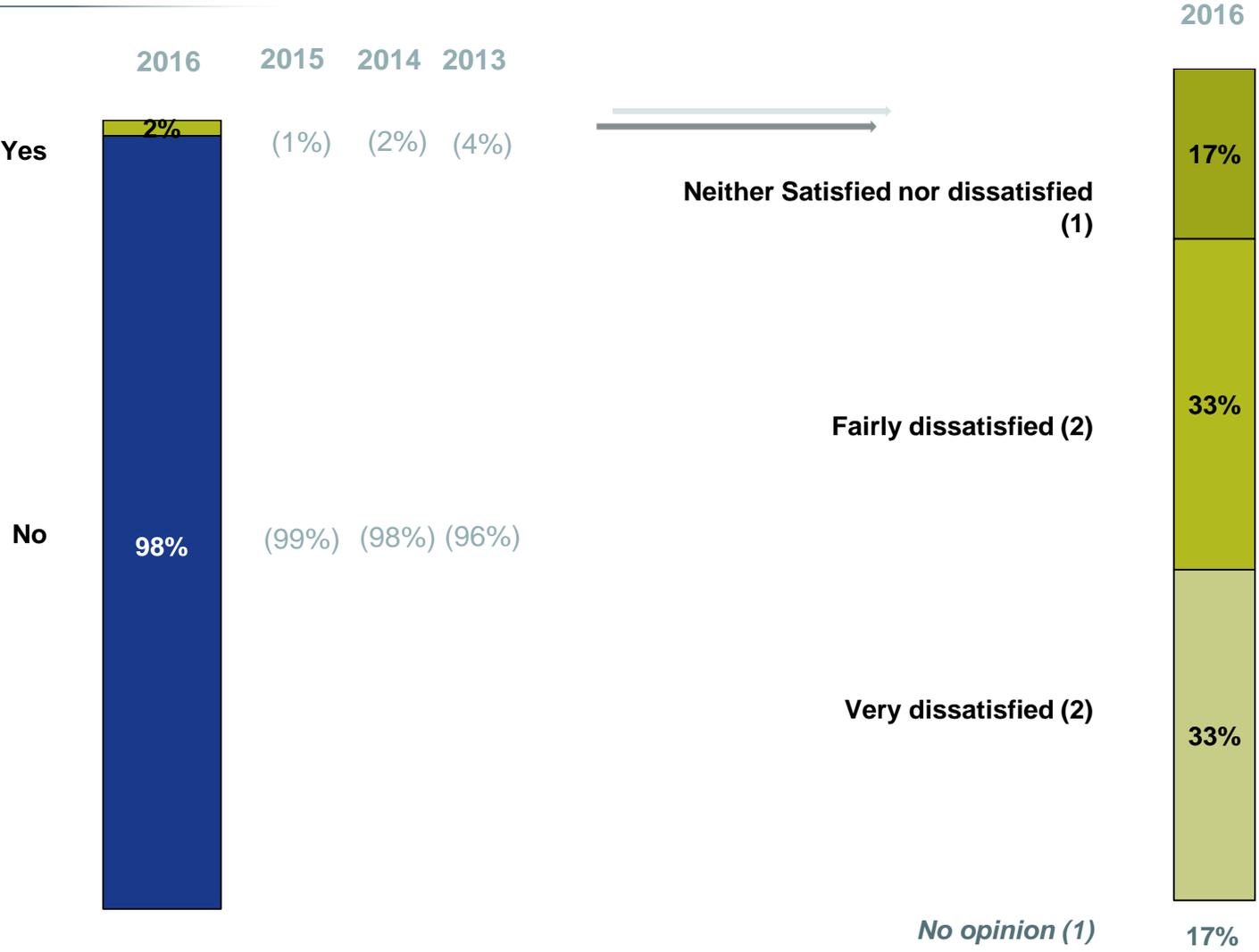
*Base size in brackets*

Do you know that Invest NI has complaints and feedback process?

[ Base: All Invest NI customers n=320 ]

*\*Small Base*

Only 6 of the 320 customers had to make a complaint during the past year. 4 of which expressed some level of dissatisfaction with how it was dealt.



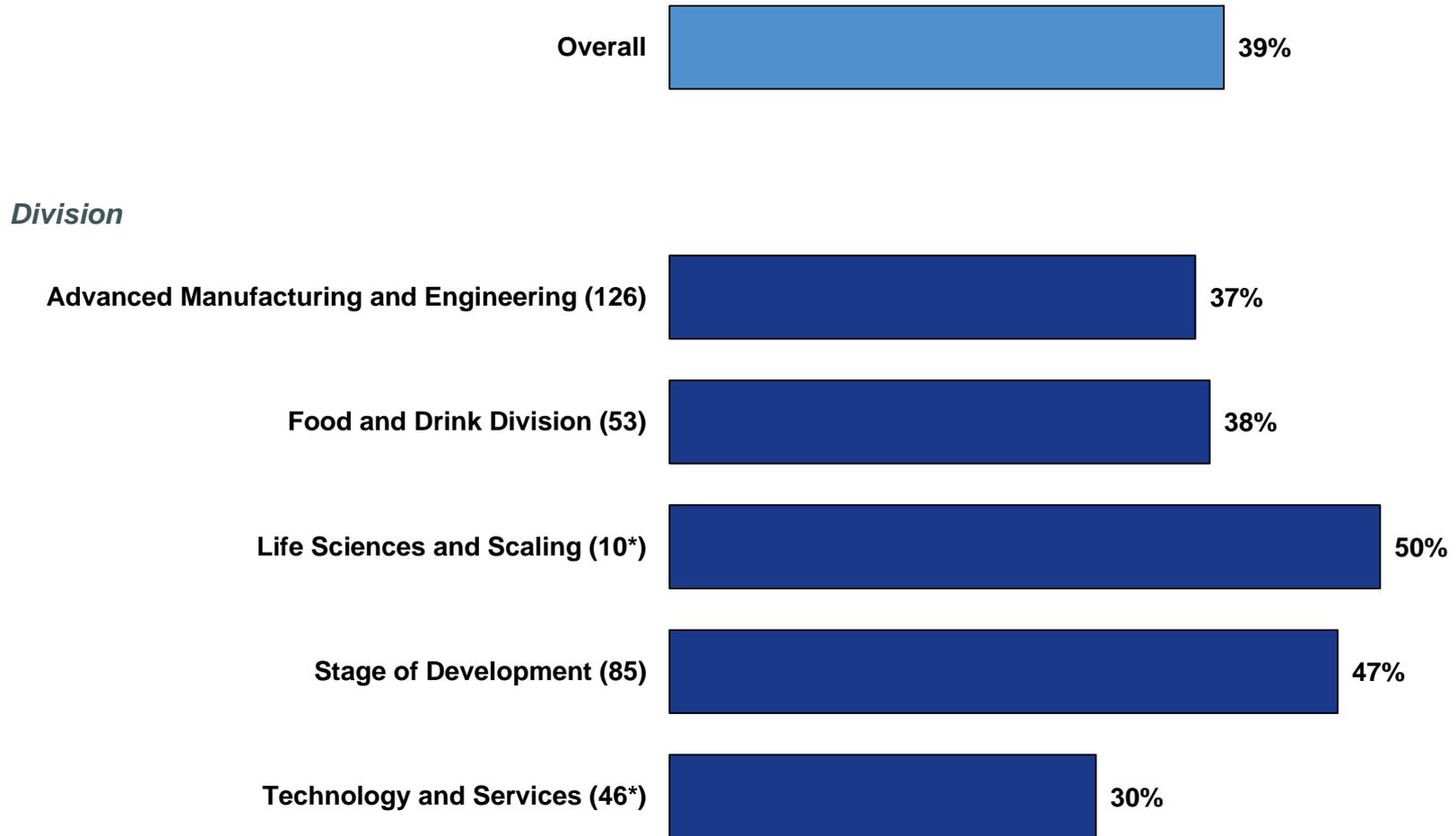
Have you had to make a complaint to invest NI at any time during the past year?

[ Base: All Invest NI customers n=320 ]

How satisfied or dissatisfied were you with the way this complaint was handled?

[ Base: All who made complaint =6 ]

Stage of Development customers were more likely to have used the new single claims form since its introduction. *Sample size for Life Sciences and Scaling was too small to draw any conclusions from.*



*Base size in brackets*

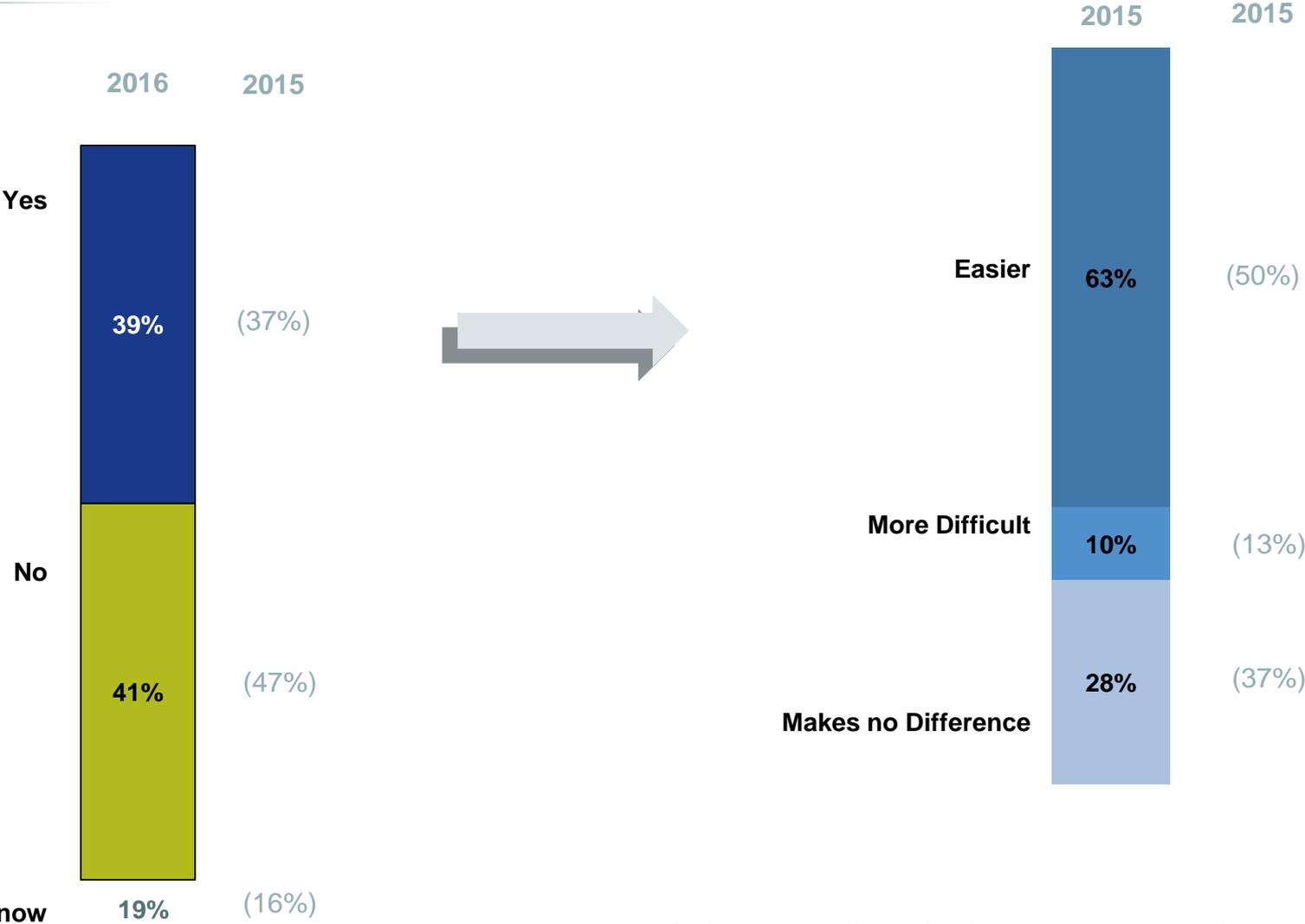
The new Invest NI single claims form was introduced in August 2015. Have you used the new Invest

*\*Small Base*

63 NI single claims form since it was introduced?

[ Base: All Invest NI customers n=320 ]

Almost two thirds of those who had used the new single claims form considered it easier to make claims utilising it. An increase on 2015 findings.



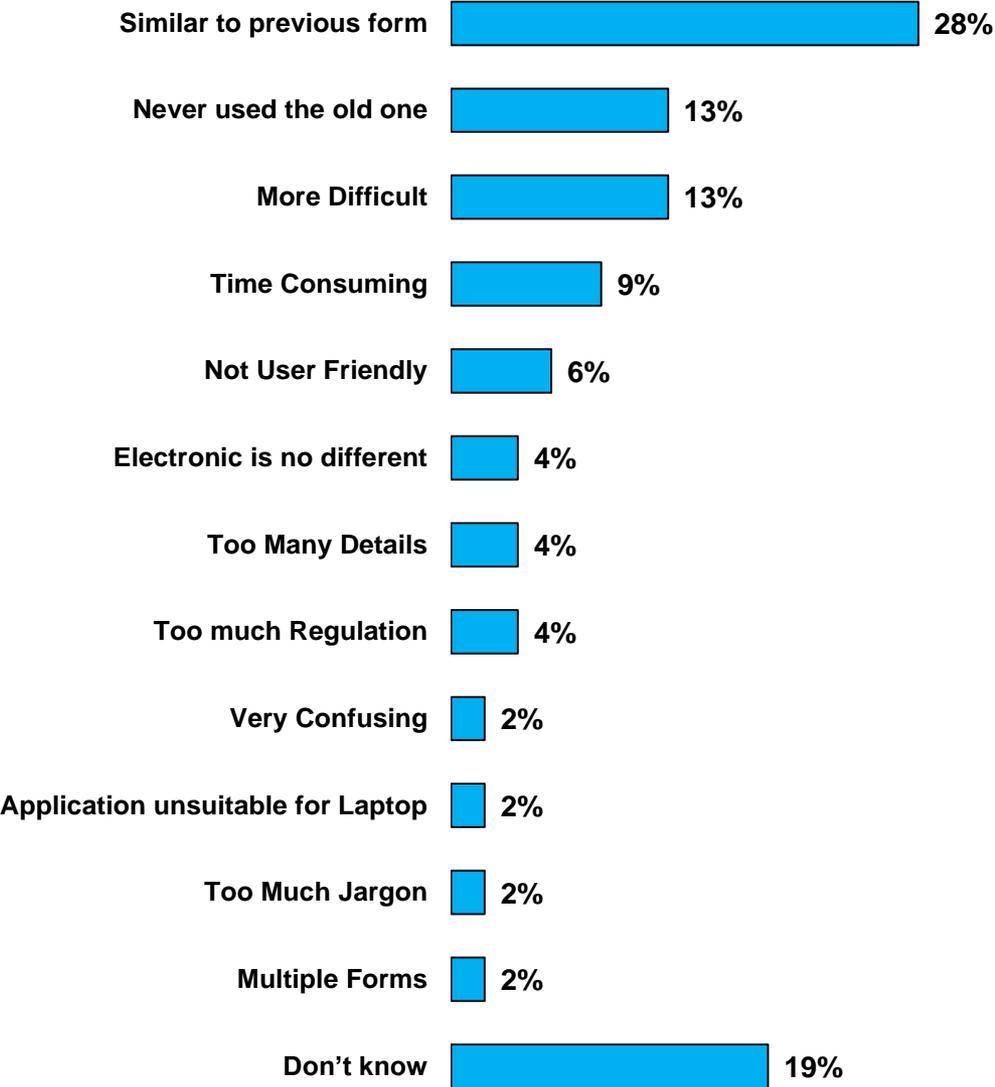
Have you used the new Invest NI single claims form since it was introduced?

[Base: All Invest NI customers n=320]

Does this form make it easier for you to make claims, more difficult or make no difference?

[Base: All who used form n=126]

The main reason the new form was regarded as not making the claims process easier was due to the similarities with the old form.

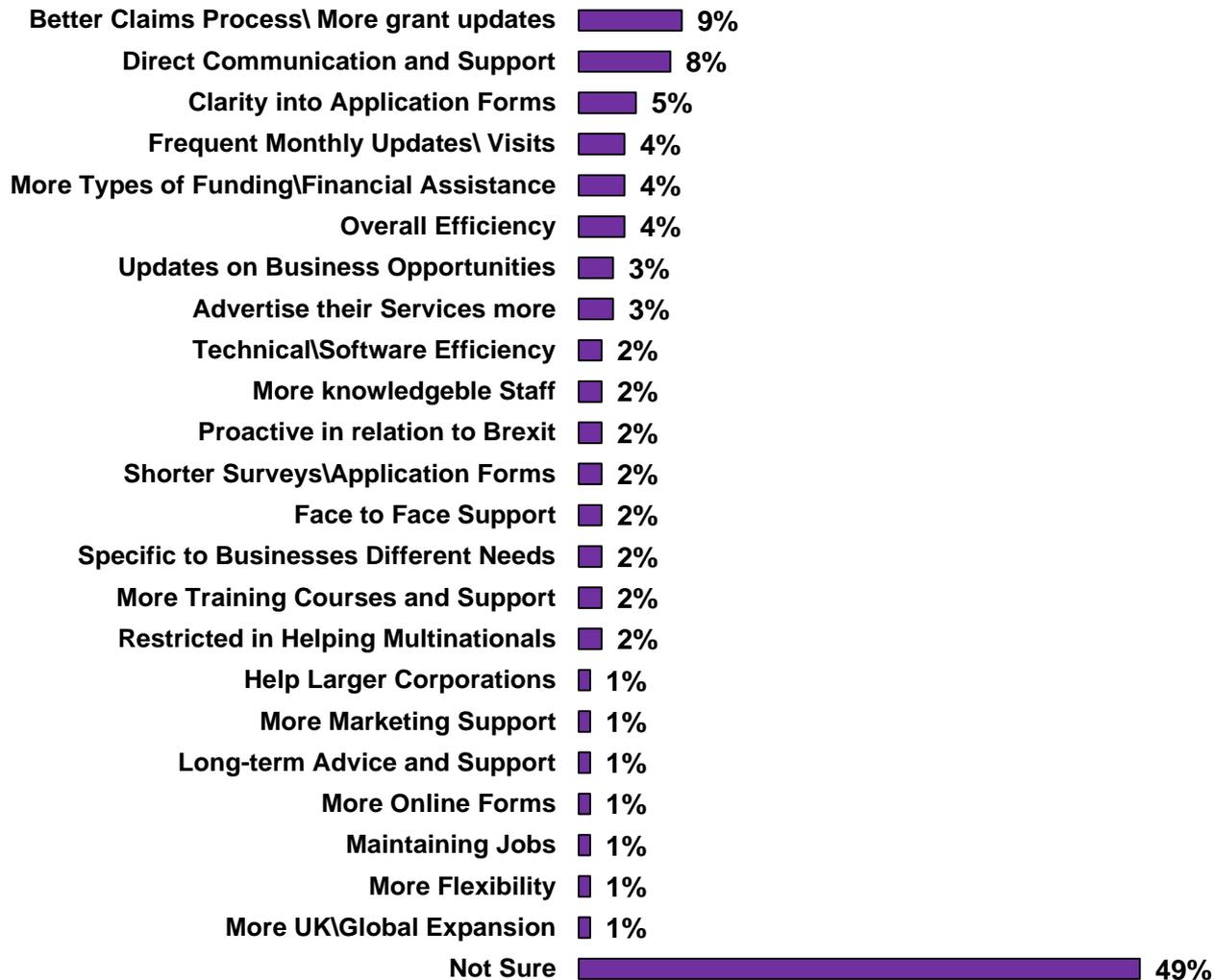


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- Complaints & Feedback Process
- **Suggested Improvements**

Suggestions of improvements customers would like to see are highlighted below.



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# Regional Office Network Customers

**KANTAR** MILWARD BROWN

# Summary & Conclusions

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## Key messages and recommendations

Levels of overall satisfaction were high with over 4 in 5 Regional Office Network Customers (86%) satisfied with the services they had received from Invest NI. Over half (53%) were 'Very' Satisfied.

In terms of customer advocacy, almost 3 in 4 (72%) would speak highly of Invest NI. Encouragingly, over 2 in 5 (42%) would claim to do this without being asked. The Net Promoter Score amongst Regional Office Network Customers was '44' with 14% being identified as detractors.

## Image and associations

In terms of Invest NI's remit, the organisation was perceived to perform best in terms of encouraging innovation and investment in research and development (68%) and helping businesses to develop in export markets (70%).

In terms of the organisations image, Invest NI was most strongly associated with being polite and friendly (mean score 4.7 out of 5), acting professionally and with integrity ( mean score 4.59 out of 5) as well as treating customers fairly (mean score 4.36 out of 5).

# Summary & Conclusions

## Communication

Almost 9 in 10 Regional Office Network customers (88%) expressed some level of satisfaction with Invest NI's communication.

Satisfaction levels with all key aspects of communication were high and achieved mean scores greater than 4 out of 5. Speaking to the most appropriate staff member (85%) was the top aspect customers were most satisfied with.

## Marketing materials

Overall satisfaction with the content of digital communications received from Invest NI sat at 66%.

## Websites

Over half (57%) of Regional Office Network Customers claimed they had visited Investni.com in the last 3 months, compared to almost a third (32%) who had visited nibusinessinfo.co.uk in the same period. When questioned about which aspect they particularly liked about each website, most aspects were preferred by around half of the visitors. The one aspect that was least preferred on both sites, was the ease of use of the websites (42% for investni.com; 41% for nibusinessinfo.co.uk).

# Summary & Conclusions

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## Team and main contact

Satisfaction with the Invest NI team and main contacts was high amongst its Regional Office Network Customers, with over 4 in 5 satisfied with the team (85%). These Invest NI contacts performed extremely well at being trustworthy (93% satisfied), responsive (87% satisfied) and proactive (83% satisfied).

Majority of customers stated their main Invest NI contact made it clear from the start how INI could assist their business (83% agree) and were provided with realistic timescales (88% agree).

Almost 3 in 4 (71%) had communicated with their main contact at least once every 3 months over the last year, with 23% communicating on a monthly basis. A majority of 53% agreed communication at least once every 3 months was the ideal frequency, 28% preferred at least monthly. Email (48%), face to face (28%) and telephone (24%) were the preferred methods of contact by most.

# Summary & Conclusions

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## **Invest NI programmes and advisory services**

Almost 3 in 4 customers (72%) were satisfied with the quality of programmes and advisory services offered by Invest NI.

## **Financial assistance and claims' process**

Over half (57%) sought funding of which 79% were satisfied with the application process and 70% were content with the time taken to approve their application. Over 4 in 5 (84%) expressed satisfaction with being kept informed regarding their application.

Communication with the claims team (86%) and the claims being processed within 30 days (82%) were the top 2 rated performing areas of the financial assistance process.

# Summary & Conclusions

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## **Complaints and feedback process**

Almost half of the Regional Office Network customers (48%) were aware of the complaints and feedback process. Reassuringly almost all (98%) had never made a complaint in 2016.

Over 4 in 5 (45%) had used the new single claims form, with 31% claiming the form made it easier to claim. When customers were asked why they did not find the form easier to use, over a quarter (29%) acknowledged they had no experience of using the old one.

## **Improvements customers want to see**

While almost half (61%) of Region Office Network customers were unable to suggest any improvements, some 7% felt there could be an improvement in terms of direct communication and support. Better claims process (5%), more frequent updates (5%) and further clarity when it came to application forms (5%) were all suggested improvements.

# Study Set-Up

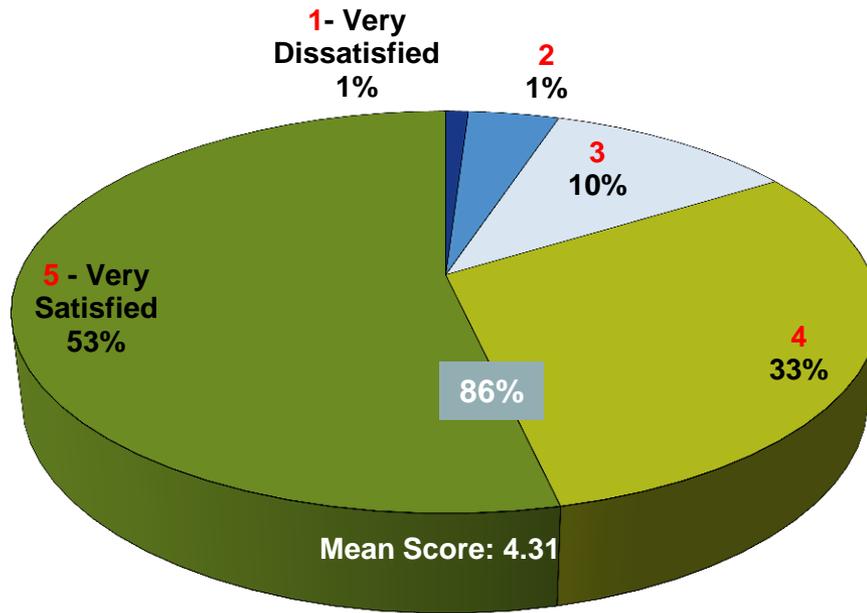
- 100 telephone interviews were conducted between 27<sup>th</sup> February to 24<sup>th</sup> March 2017.

Division	Number in universe (after deduping)	% of universe sampled	Achieved sample
Regional Office Network	437	22%	100

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.

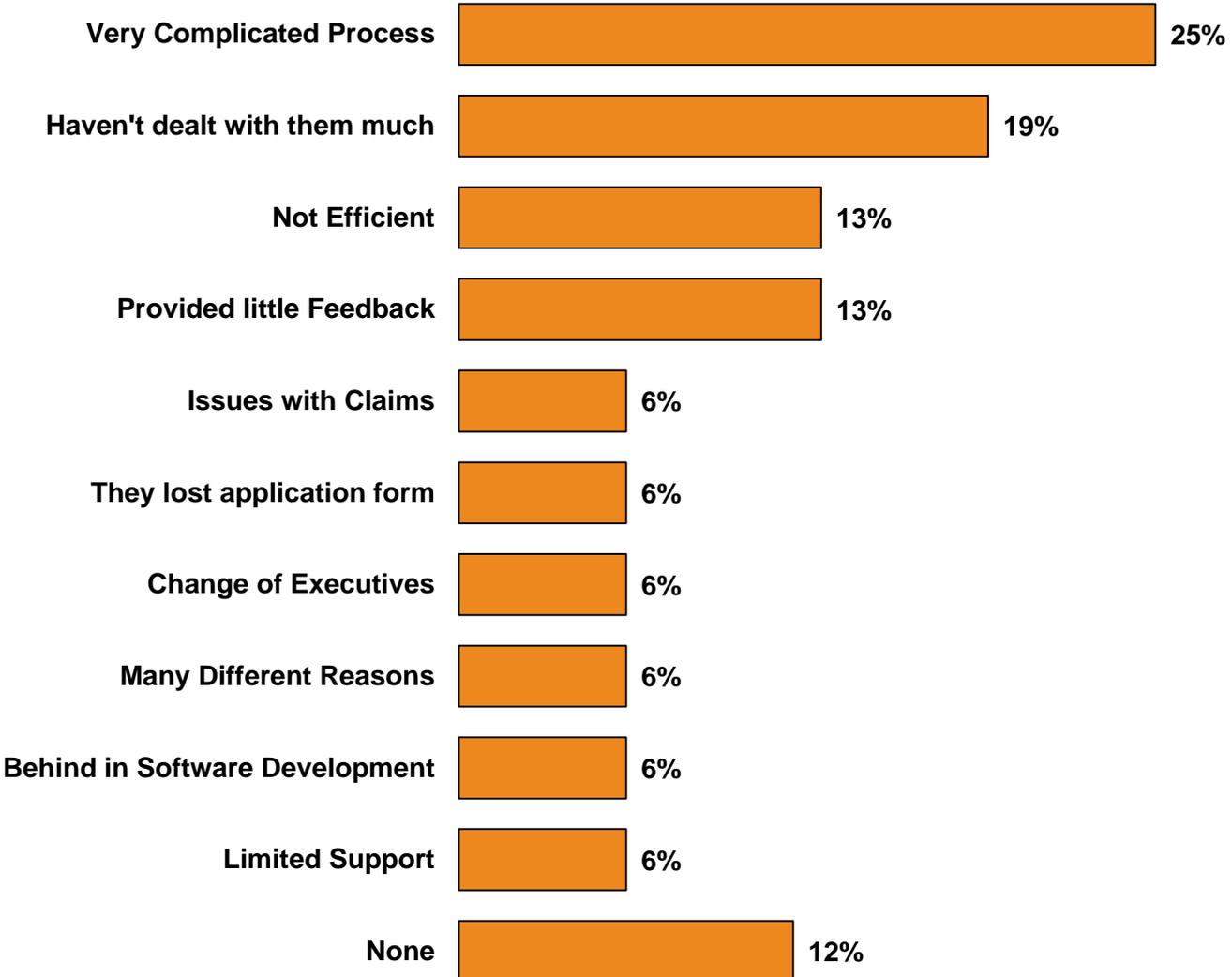
# Levels of Satisfaction were high with over 4 in 5 claiming to be satisfied with Invest NI

1=very dissatisfied \ 5=very satisfied



Overall, how satisfied or dissatisfied are you with the service you have received from Invest NI in the past 12 months? [ Base: Regional Office Network Customers n=100 ]

The top 3 reasons cited for being dissatisfied were complicated procedures, poor contact and inefficiencies.



Is there a specific reason for saying that?

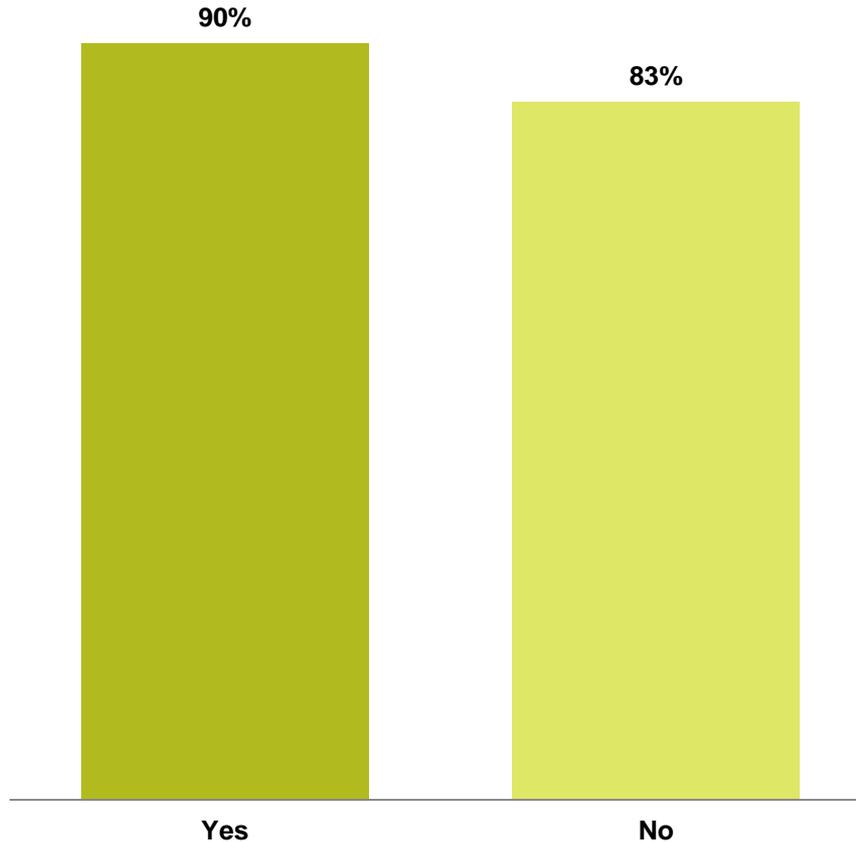
[ Base: Dissatisfied with the service you have received from Invest NI in the past 12 months n=16\* ]

Those with more frequent contact were much more likely to be satisfied at an overall level.

Overview: Impact of frequent contact on overall satisfaction

Contact with main contact at least once every three months

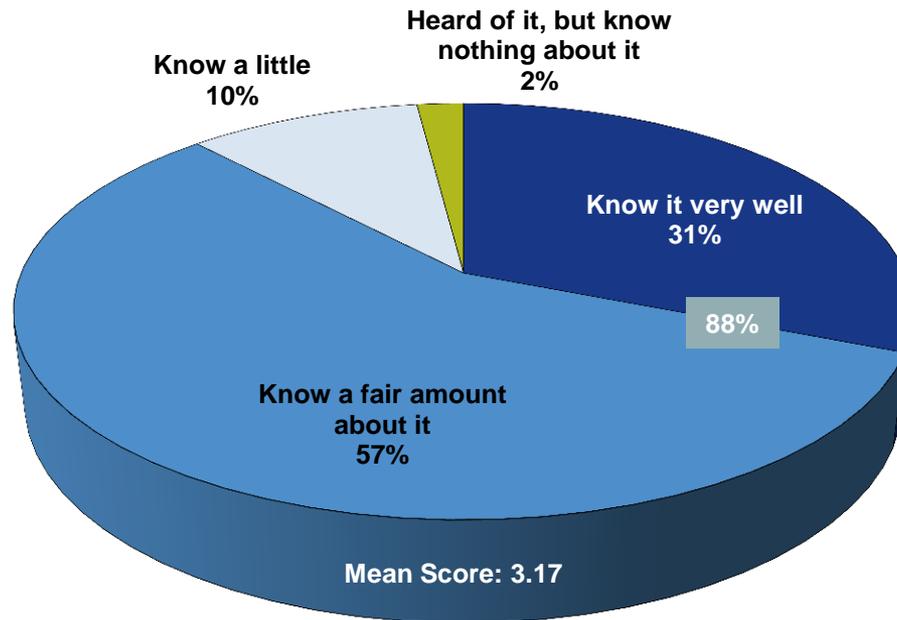
% satisfied with Invest NI overall



Overall, how satisfied or dissatisfied are you with the service you have received from Invest NI in the past 12 months? [ Base: Regional Office Network Customers n=100 ]

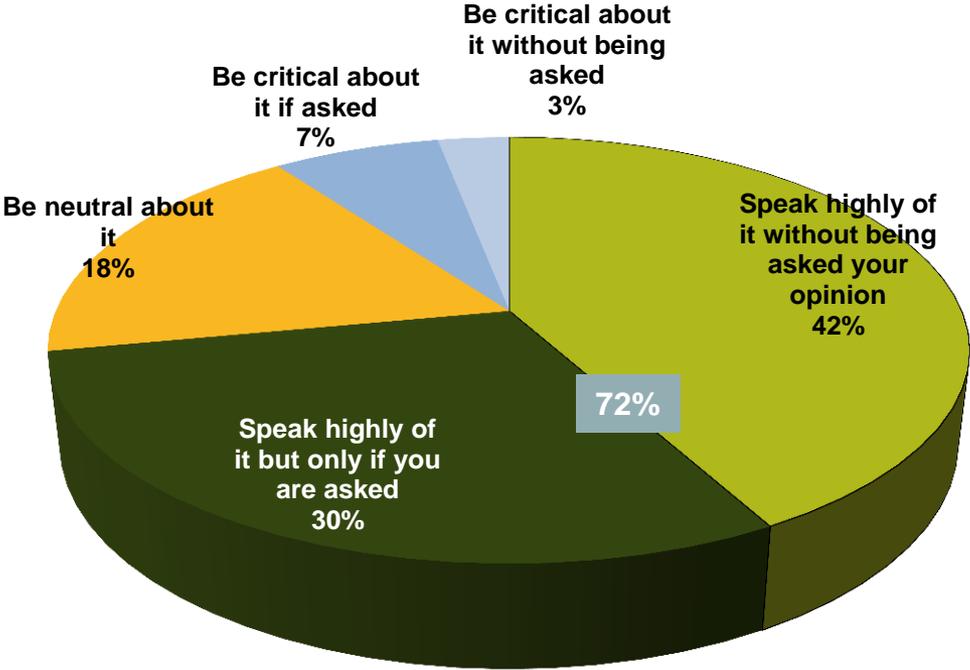
Levels of familiarity with Invest NI were high with almost 9 in 10 claiming to know at least a fair amount about the company.

## Familiarity



Almost 3 in 4 customers would speak highly of Invest NI with 2 in 5 claiming they would 'speak highly of it without being asked'.

## Advocacy



# Net Promoter Score- 2016

## NPS by Division

	Regional Office Network
n=	100
Promoters	58
Passives	28
Detractors	14
<b>NPS (promoters-detractors)</b>	<b>44</b>

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: Regional Office Network Customers n=100 ]

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Invest NI's top 2 strongest areas of performance were perceived as being business development in export markets and encouraging innovation.

How Invest NI performs in these areas



Amongst Regional office Network customers Invest NI was strongly associated with being polite and friendly, acting professionally and with integrity and treating customers fairly.

Image dimensions

**Invest NI ...** **Mean Score 2016**

Scale 1 (strongly disagree) to 5 (strongly agree)



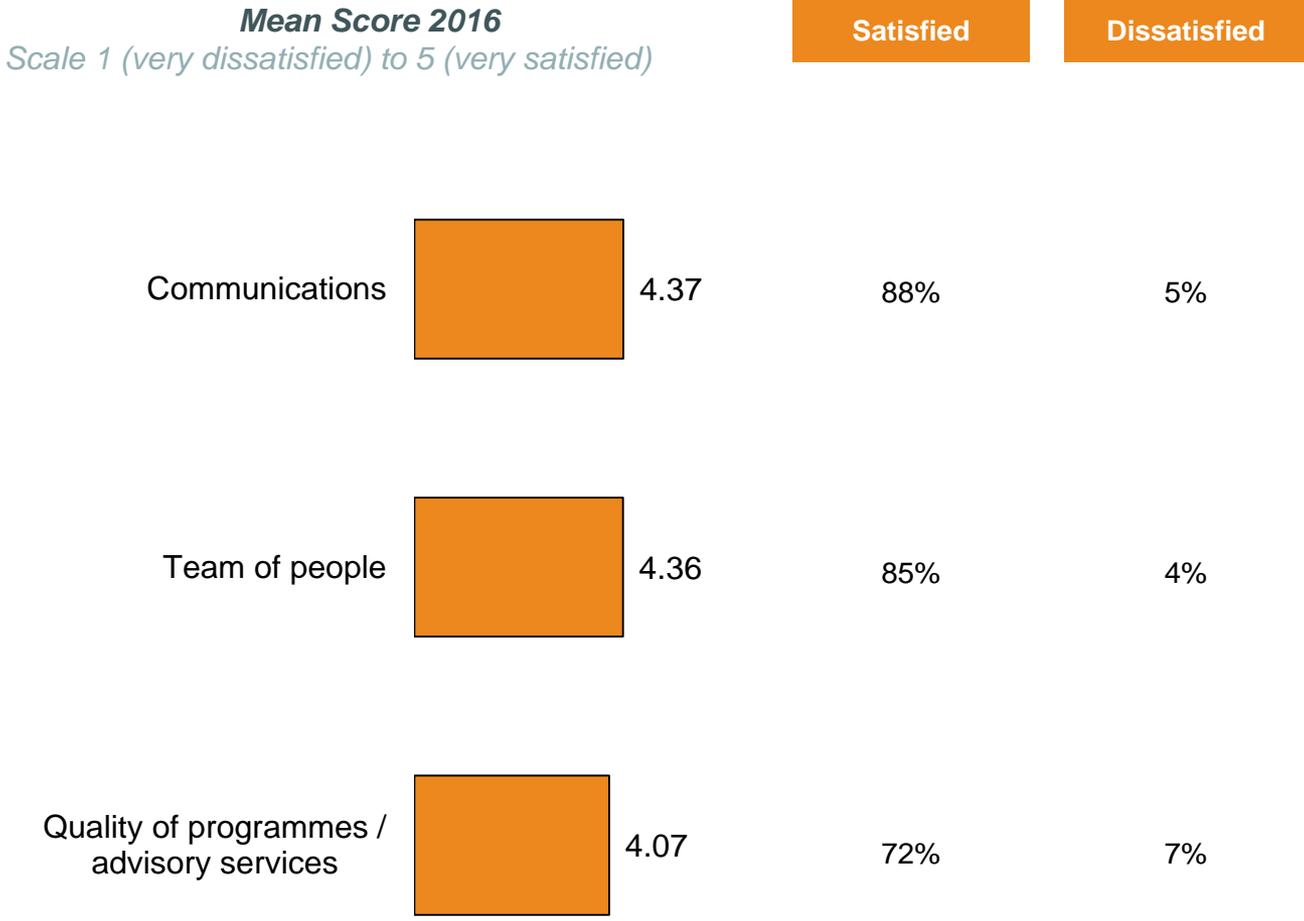
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High levels of satisfaction were achieved for all three KPIS. The KPI with the highest level of satisfaction was communications.

Satisfaction by area



How satisfied or dissatisfied are you with the ... offered by Invest NI?  
[ Base: Regional Office Network Customers n=100 ]

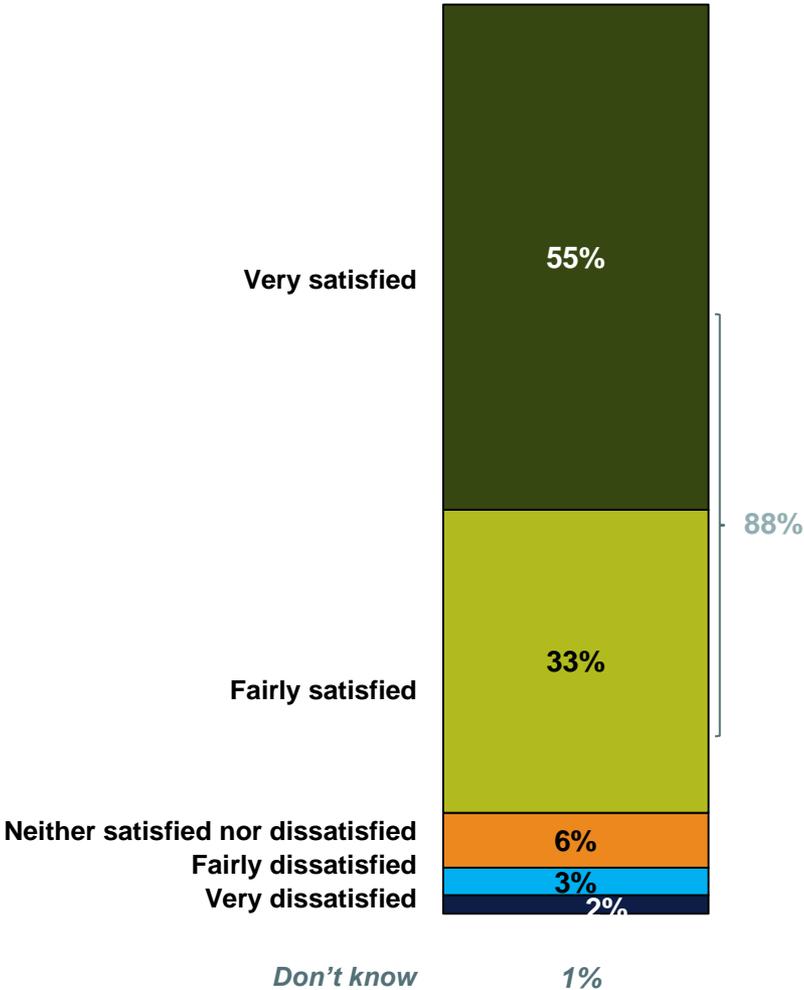
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Satisfaction with communication was high with almost 9 in 10 expressing some level of satisfaction.

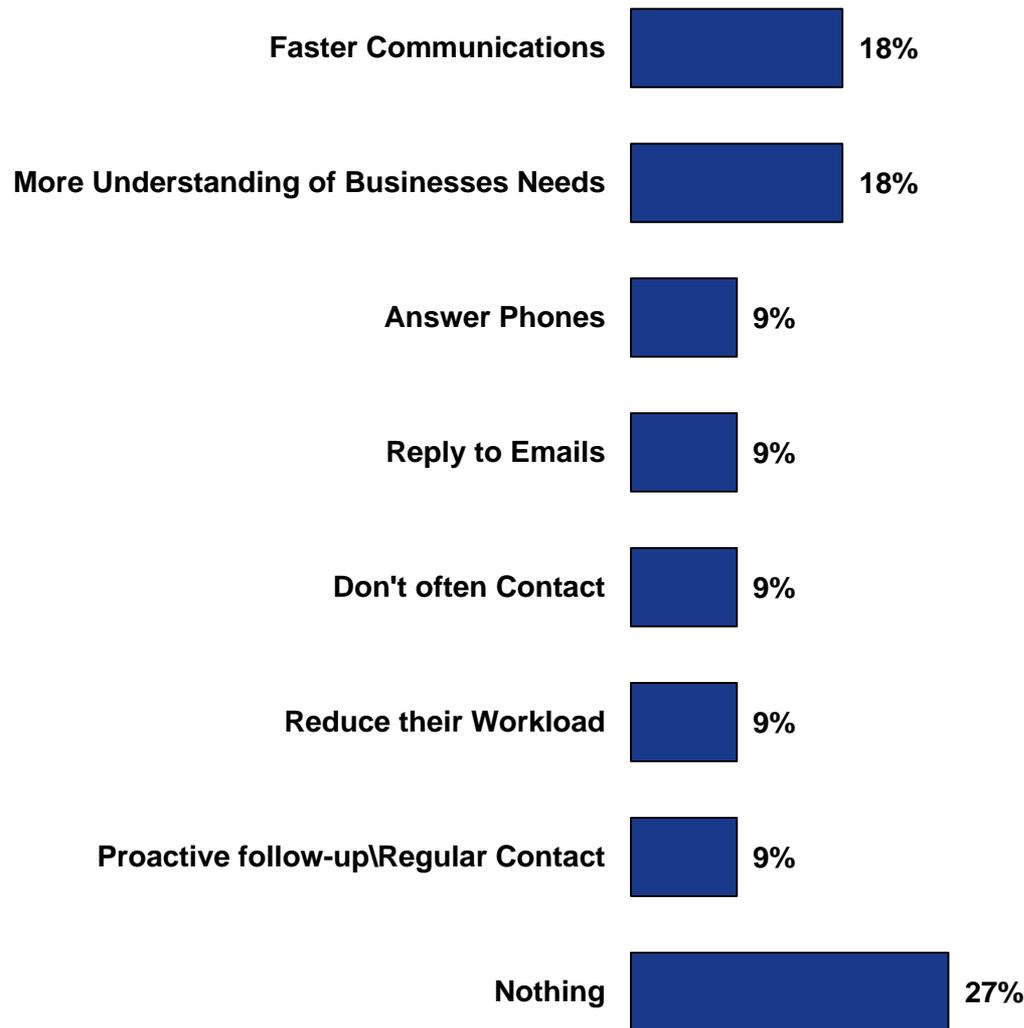
Overall satisfaction with communication



Mean Score: 4.37

Overall how satisfied or dissatisfied are you with the communication between yourself and your main Invest NI contacts over the last 12 months? [ Base: Regional Office Network Customers n=100 ]

Some 11 customers were not satisfied with the communication with their main Invest NI contacts. Suggestions of how communications could be improved are highlighted below.



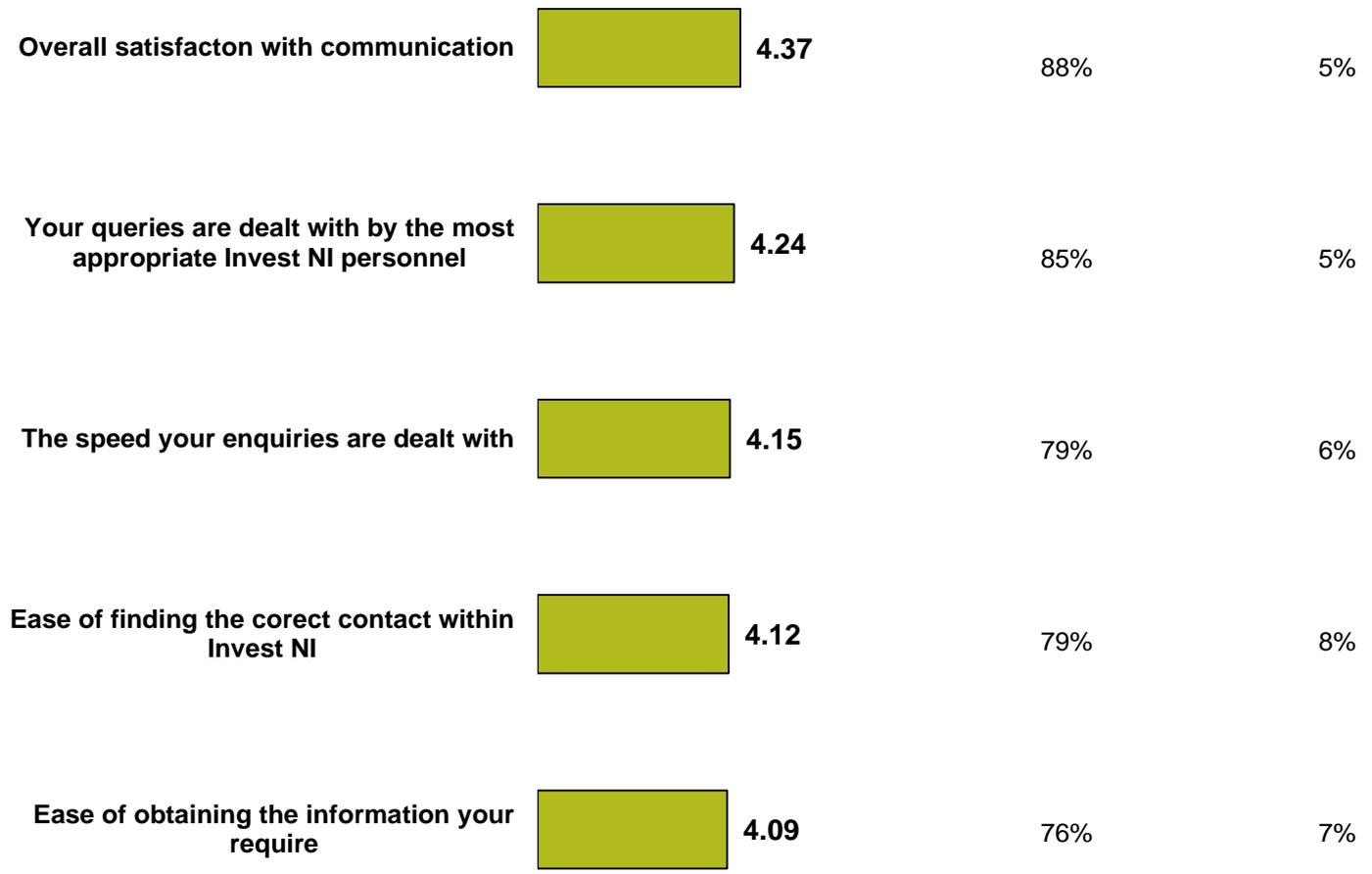
There was high levels of satisfaction with all areas of communication.

Satisfaction with communication aspects

Mean Score 2016

Scale 1 (Very dissatisfied) to 5 (Very satisfied)

Satisfied Dissatisfied

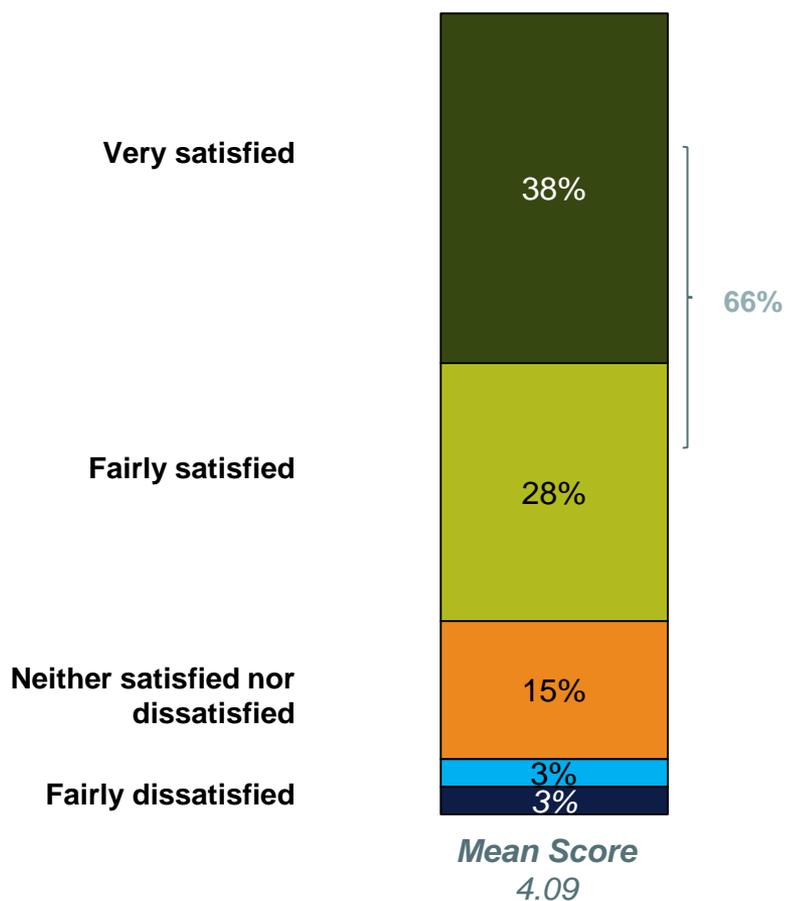


Overall how satisfied or dissatisfied are you with ...between yourself and Invest NI over the last 12 months? [ Base: Regional Office Network Customers n=100 ]

Below is a list of suggested improvements in relation to communications. Better delegation of queries and more tailored communications for smaller businesses were some of the suggestions offered. Reassuringly the majority had no suggestions.



Two thirds of customers were satisfied with digital communications from Invest NI. There were low levels of dissatisfaction and almost a sixth remained neutral.



How satisfied or dissatisfied are you with the content of the digital communications, such as the Ezines, you received from Invest NI?

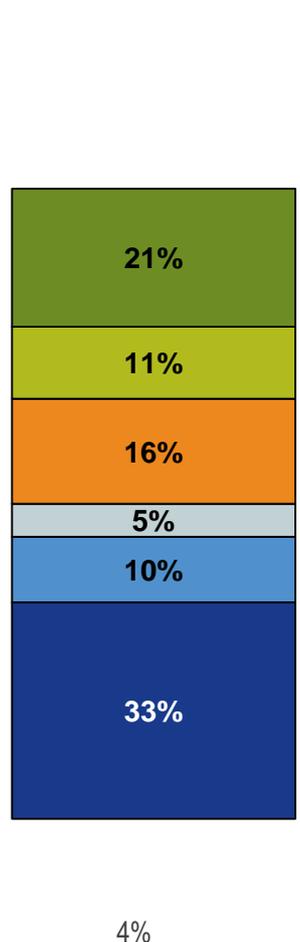
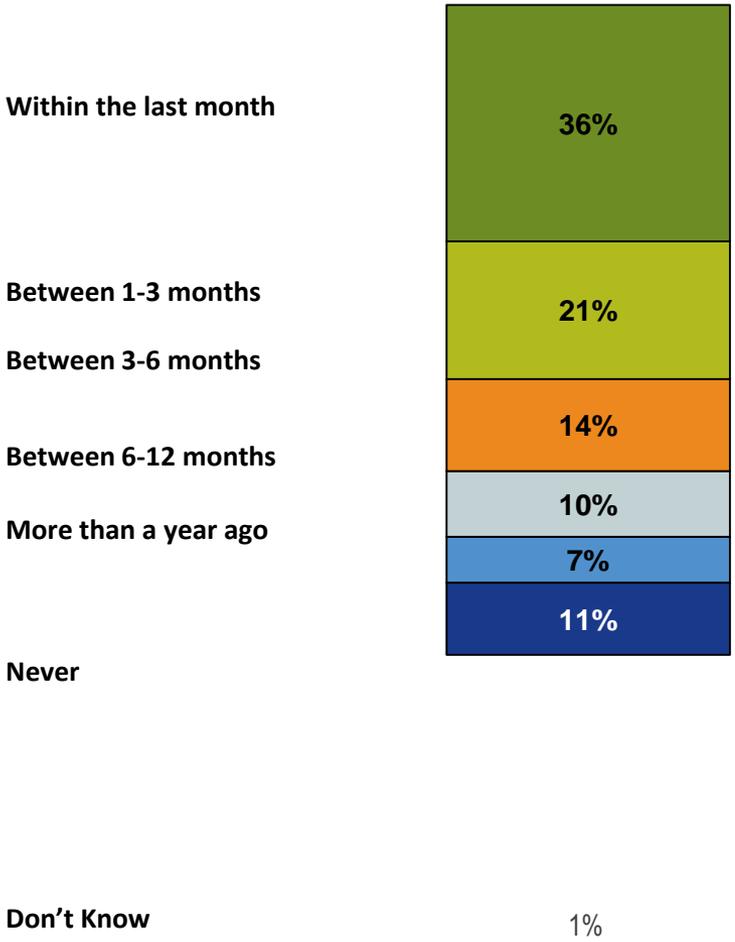
[ Base: Regional Office Network Customers n=100 ]

Customers were more likely to have visited investni.com than nibusinessinfo.co.uk, with it being more likely to have been viewed recently also.

2016 Usage of websites

www.investni.com

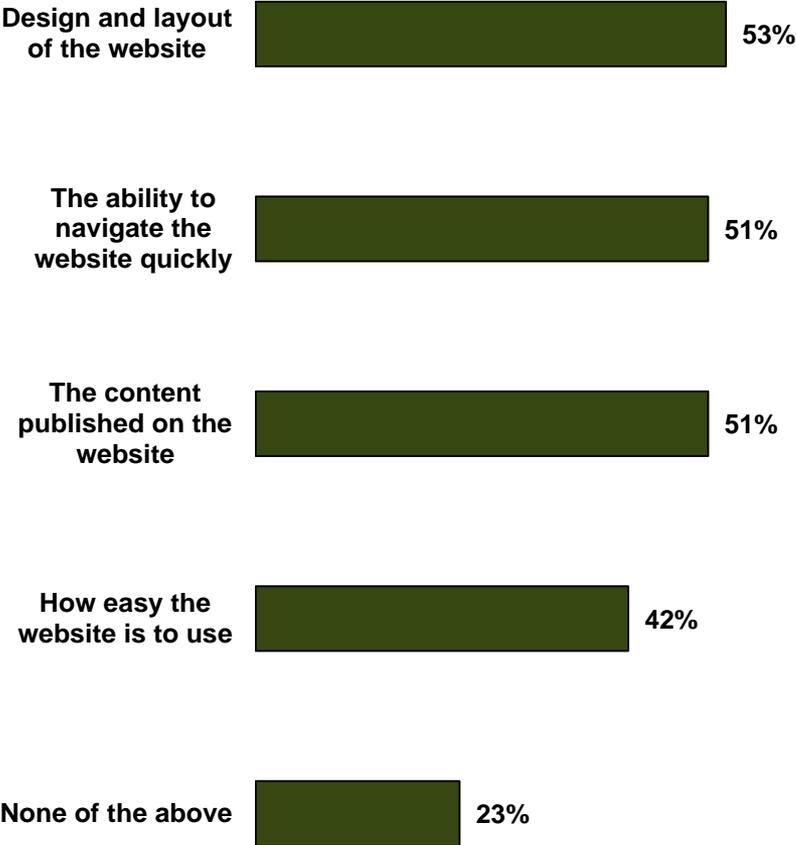
www.nibusinessinfo.co.uk



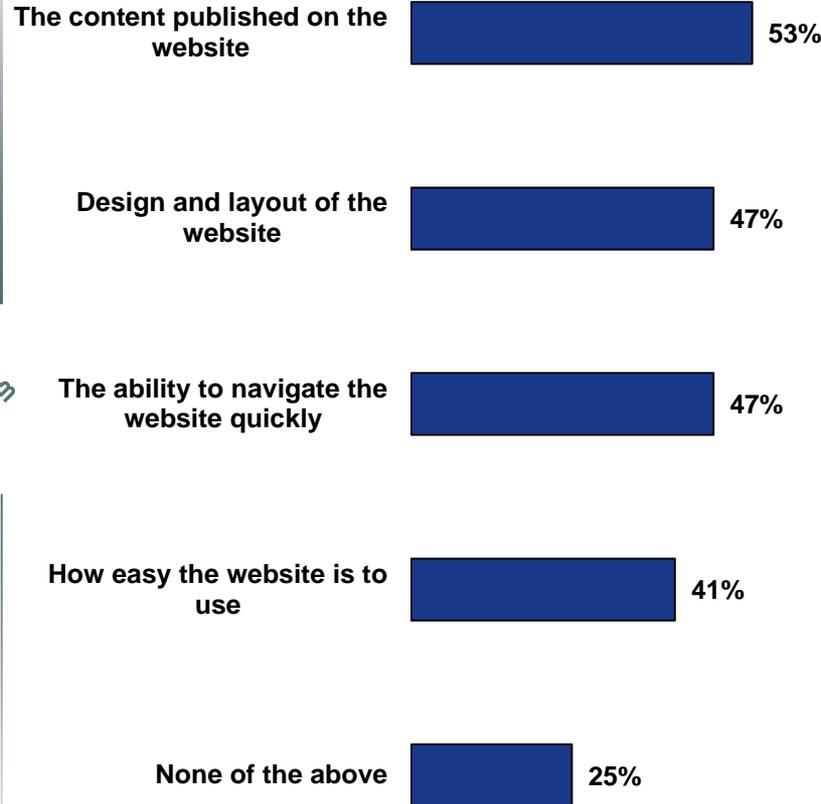
When did you last visit the following websites...  
[ Base: Regional Office Network Customers n=100 ]

Most aspects of each website were preferred by around half of visitors.

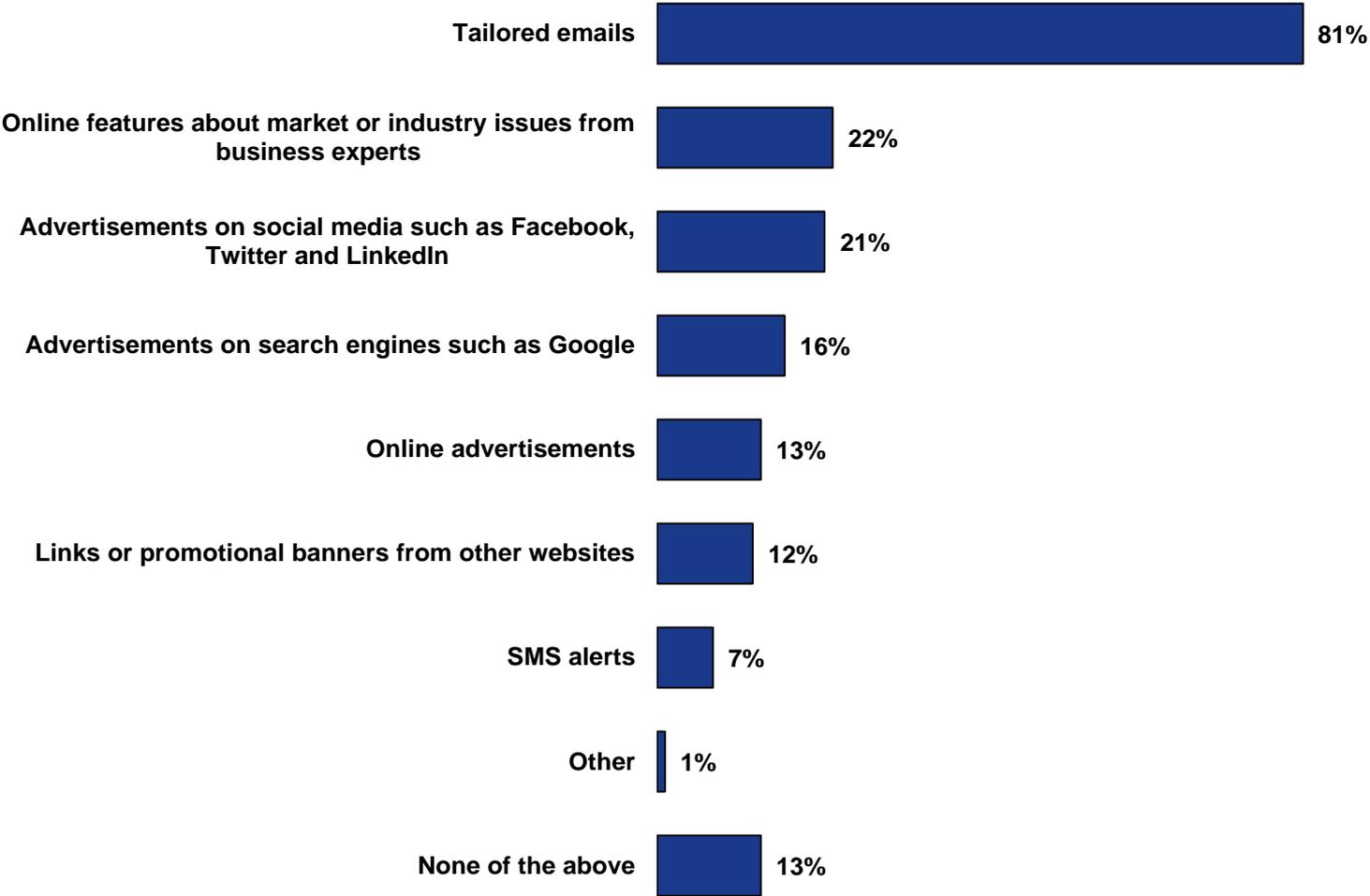
[www.investni.com](http://www.investni.com)



[nibusinessinfo.co.uk](http://nibusinessinfo.co.uk)



Tailored emails were, by far, considered the most likely method of encouraging them to visit the websites.



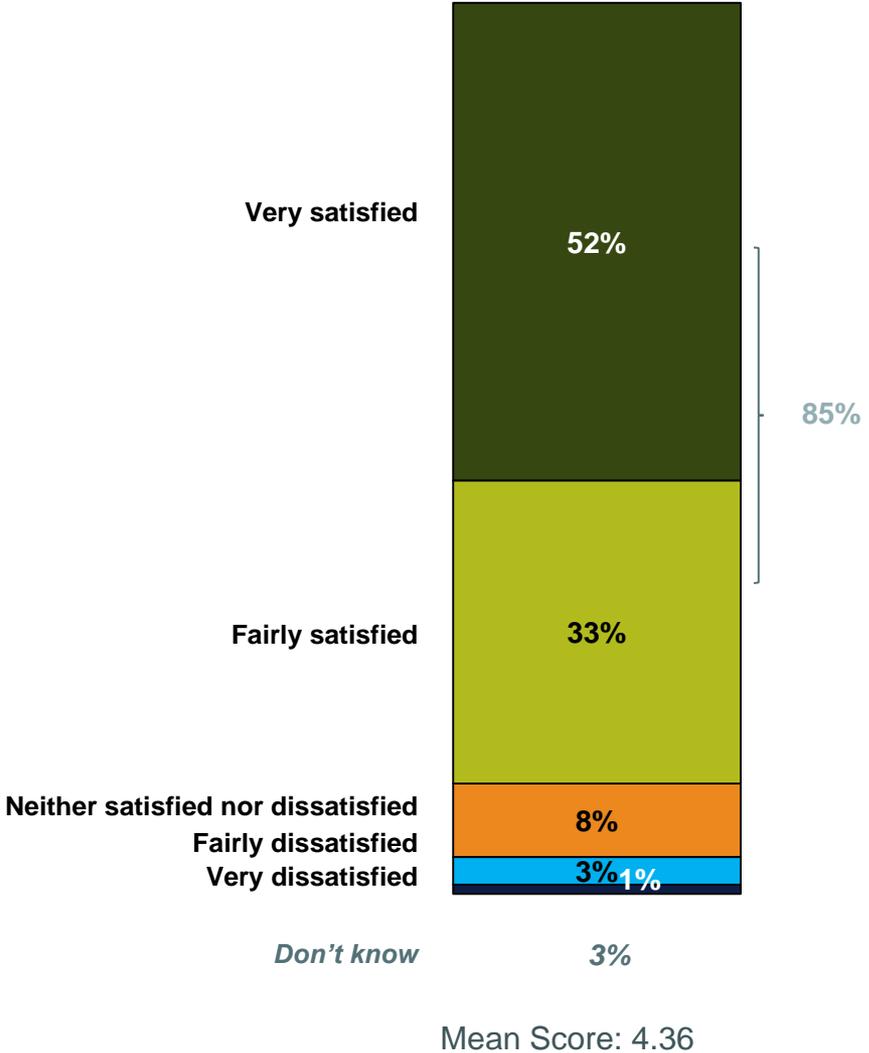
# Agenda

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- Study Set-up
- Overall Satisfaction, Familiarity and Advocacy
- Image dimensions
- Overview satisfaction KPIs
- Communication
- **Team and main contact**
- Programmes & Advisory services
- Financial assistance and claims process
- Complaints & Feedback Process
- Suggested Improvements

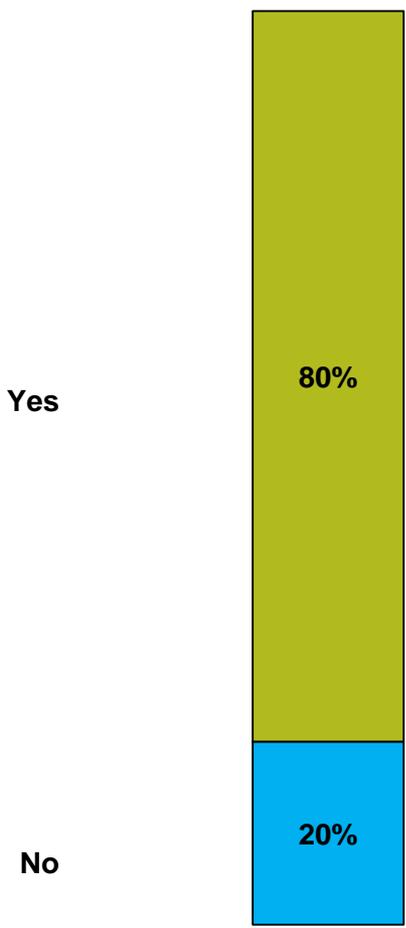
Overall satisfaction with the team of people customers work with was high, with over half claiming to be 'very' satisfied.

Satisfaction with Invest NI team

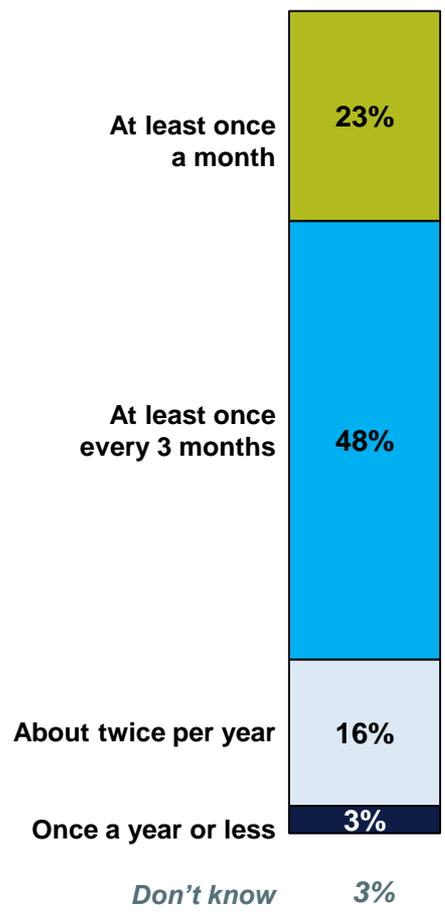


Overall, how satisfied or dissatisfied are you with the service provided by the team of people you have been working with at Invest NI in the last 12 months? [ Base: Regional Office Network Customers n=100 ]

Some 4 in 5 customers had been in contact with their direct liaison in the last 12 months, with the most common frequency being at least every 3 months.



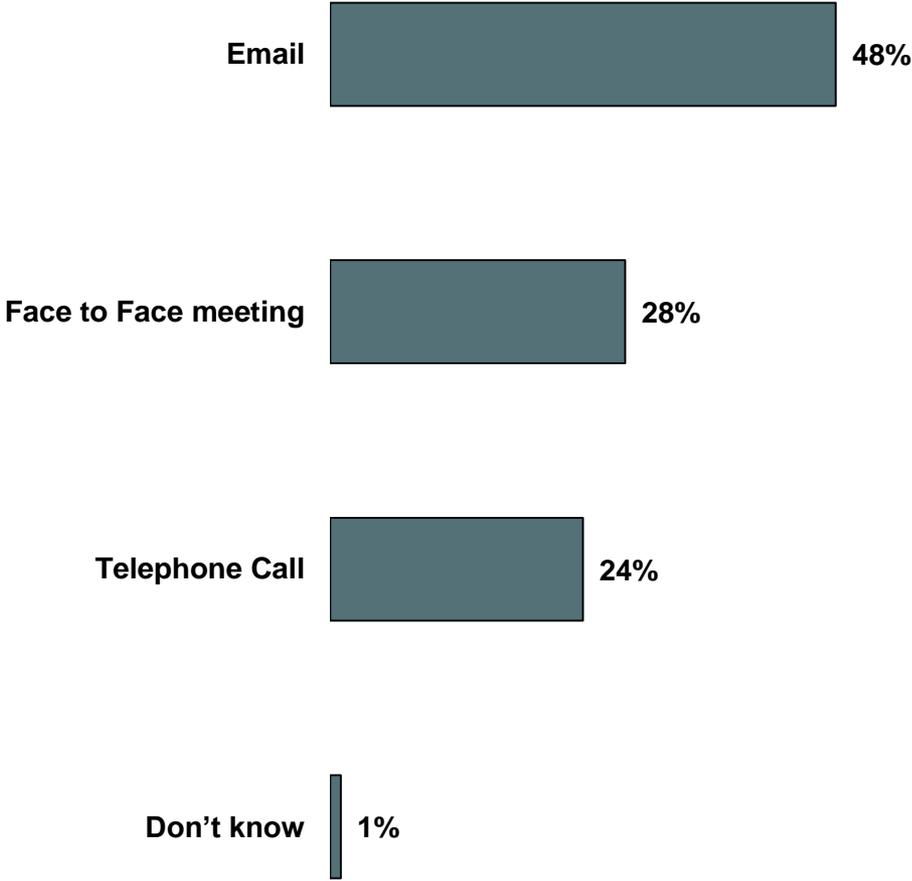
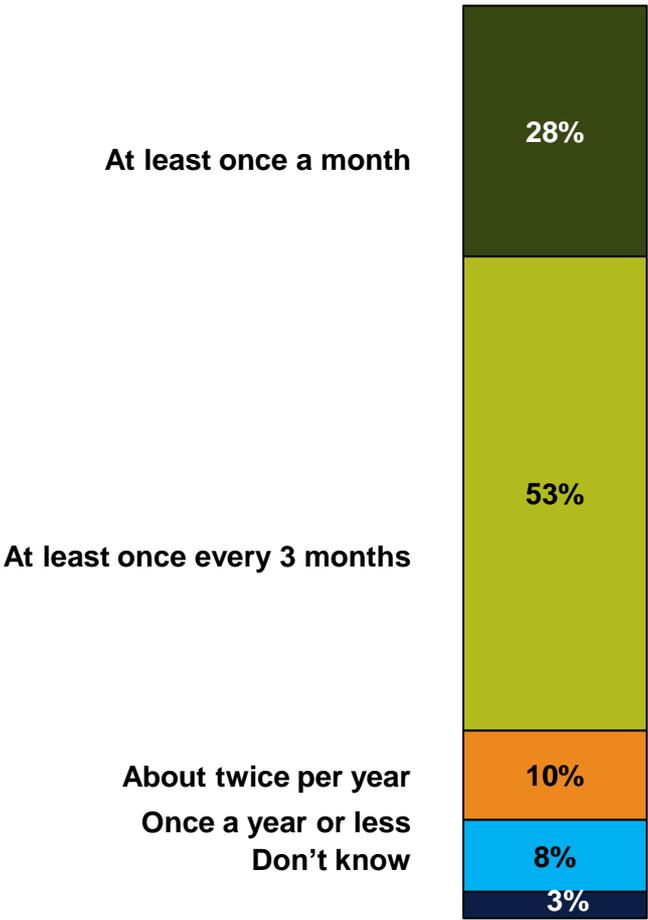
Have you met with your company's main contact within Invest NI in the last 12 months?  
[ Base: Regional Office Network Customers n=100 ]



How proactive has your main contact been communicating with you over the last year?  
[ Base: Regional Office Network Customers in contact over last 12 months n=80 ]

At least once every 3 months was the preferred frequency of contact for the majority, with the largest proportion citing email as their preferred method of communication.

Ideal Frequency and preferred method of Contact



What would be your ideal frequency of communication with your main contact?  
 [ Base: Regional Office Network Customers with main contact n=80 ]

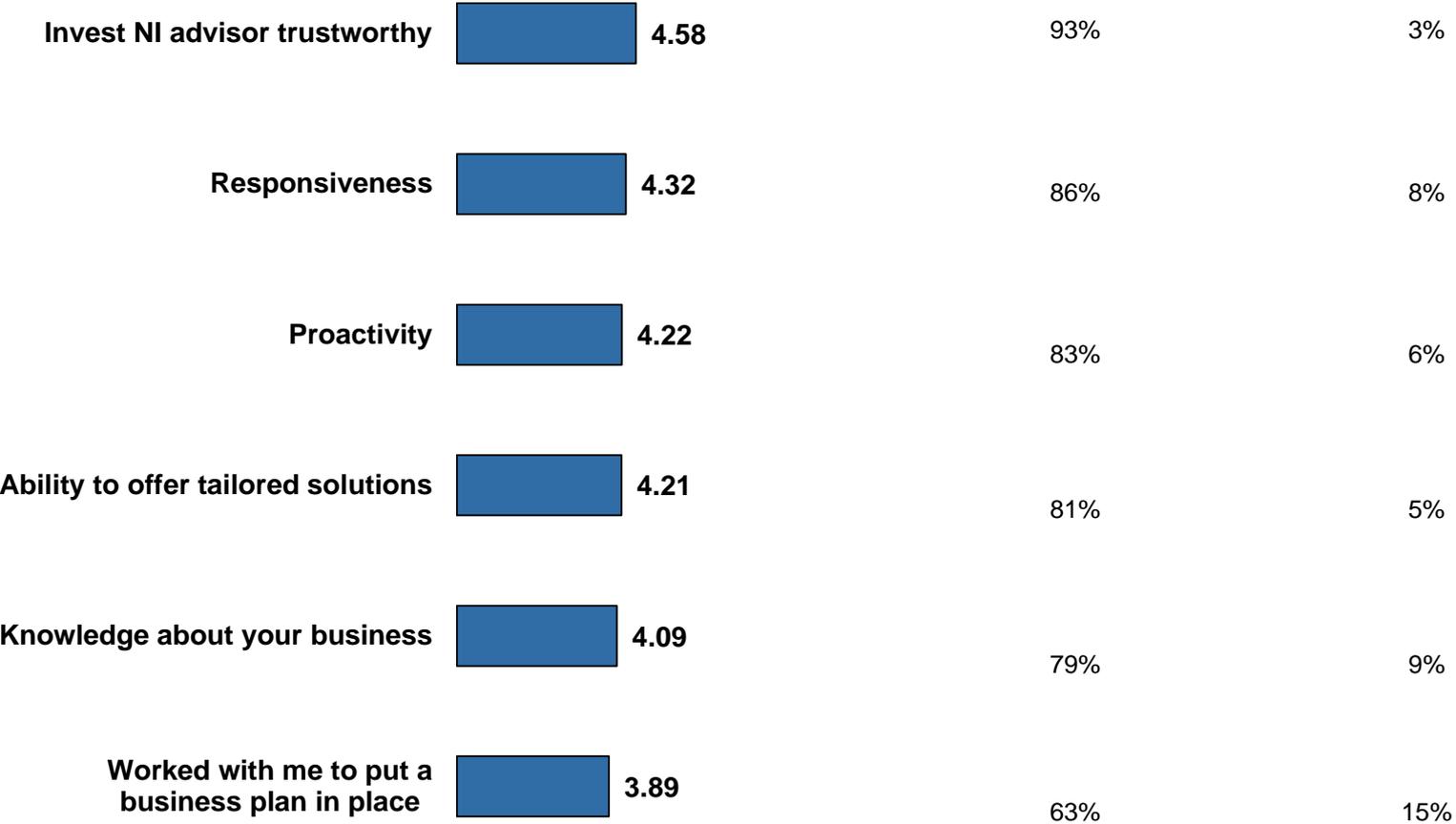
What would be your preferred method of communication?  
 [ Base: Regional Office Network Customers with main contact n=80 ]

Most aspects around the main contact achieved high levels of satisfaction. Levels peaked in terms of trustworthiness and responsiveness. However, one area where levels could be improved is the working with customers to put a business plan in place.

**Satisfaction with aspects regarding main contact**

*Mean Score 2016*

*Scale 1 (Very dissatisfied) to 5 (Very satisfied)*



**Satisfaction with main contact's performance?**

[ Base: Regional Office Network Customers with main contact n=80 ]

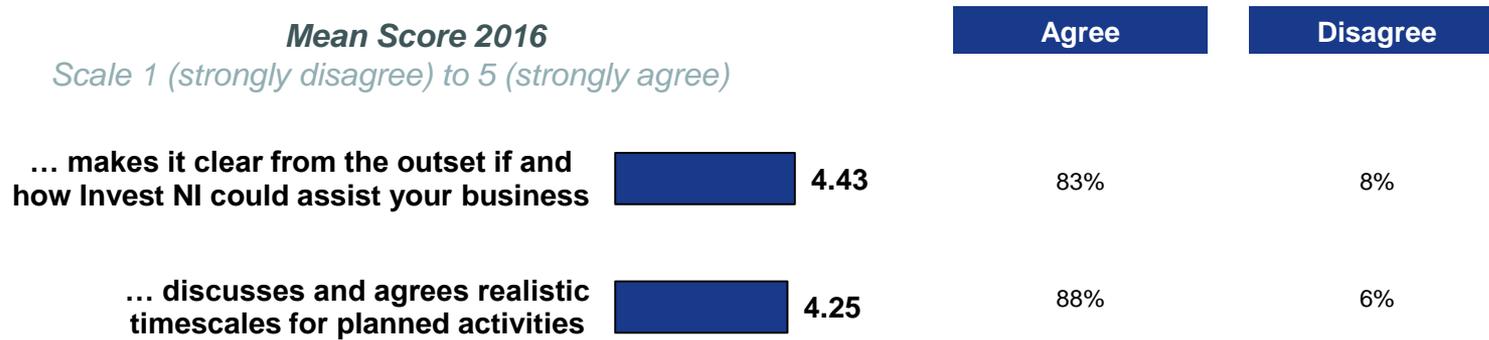
On the whole, main contacts made it clear how Invest NI can assist the business and provide realistic timelines.

Expectancy management and timescale planning

Your main contact ...

**Mean Score 2016**

Scale 1 (strongly disagree) to 5 (strongly agree)



Agreement ...

[ Base: Regional Office Network Customers in contact over last 12 months n=80]

# Agenda

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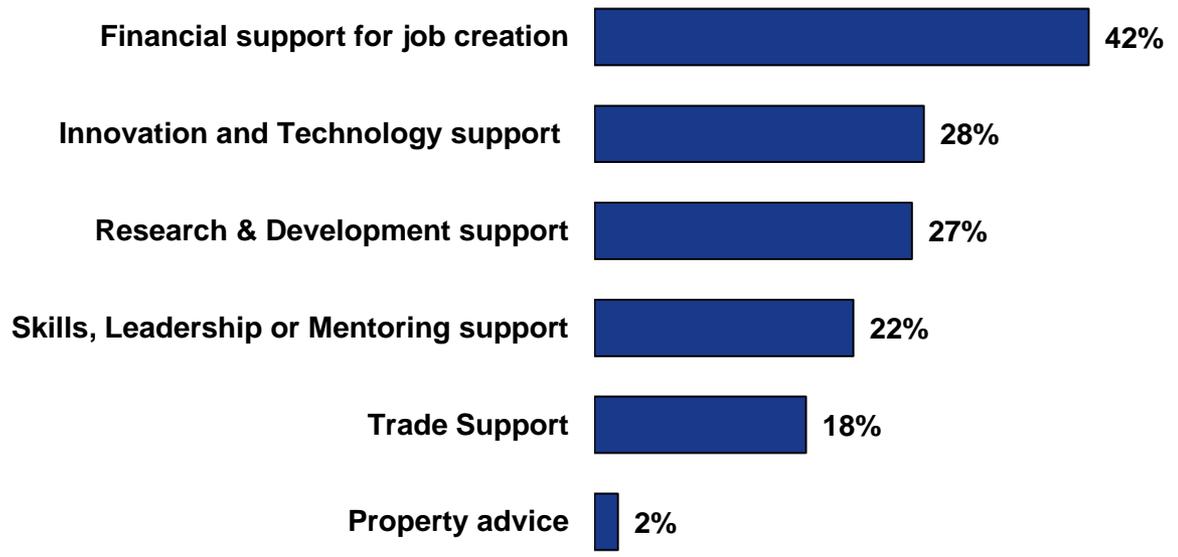
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# 3 in 5 Regional Office Network Customers sought support in 2016. Finance was the area where most customers sought support.

**Did you access any Invest NI support this year?**  
[Base: Regional Office Network Customers n=100]

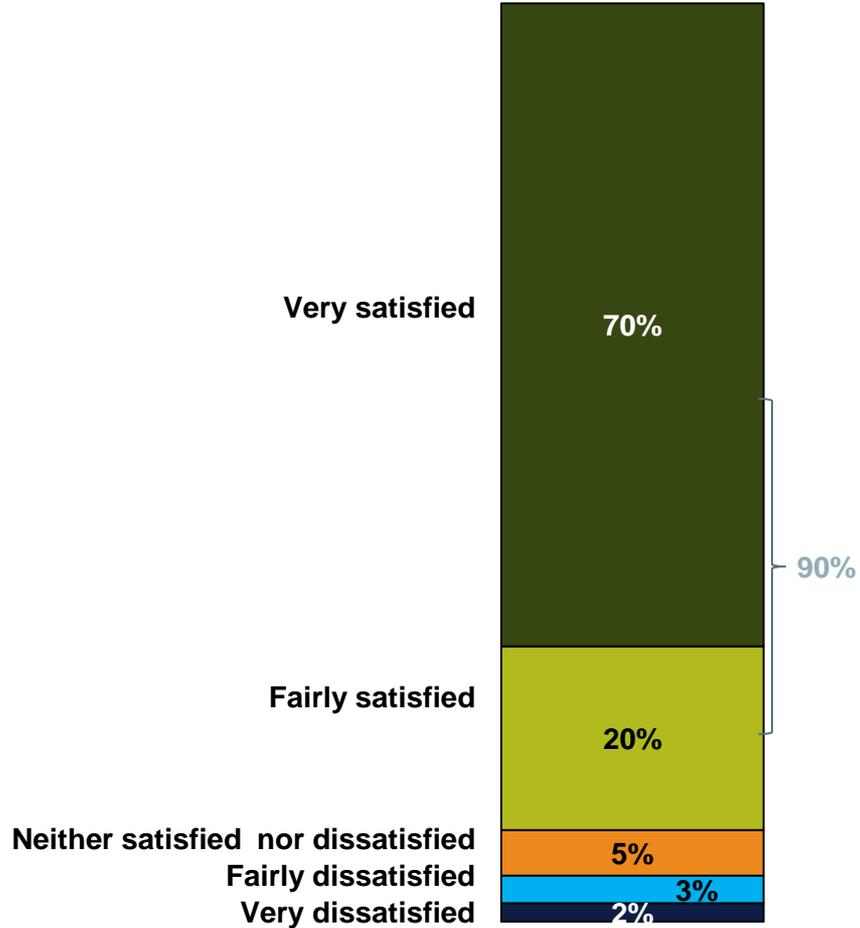


**What support area did you access?**  
[Base: Regional Office Network customers seeking support n=60]



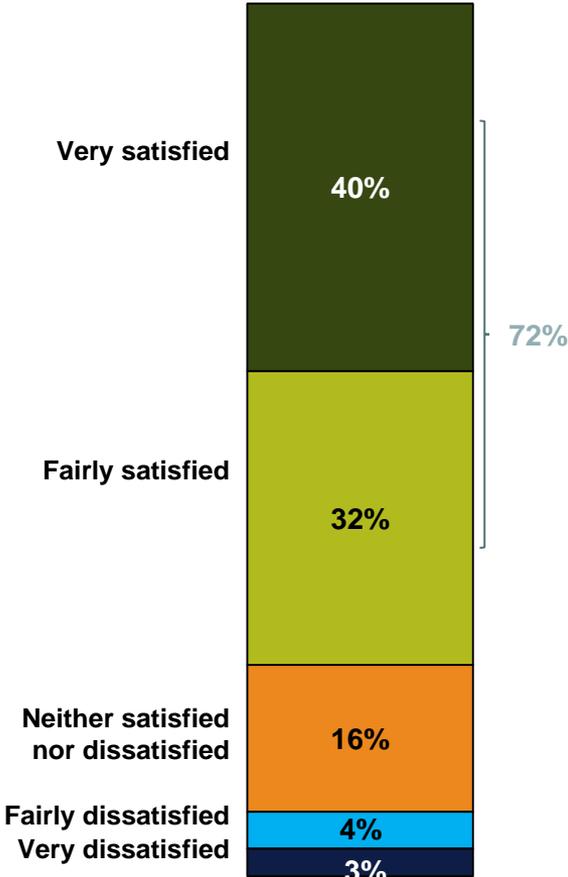
\*Small Base

9 in 10 were satisfied with the support they received, with the largest proportion very satisfied.



# Over 7 in 10 were satisfied with the quality of programmes and advisory services Invest NI offers

## Satisfaction with quality of programmes & advisory services



How satisfied or dissatisfied are you with the quality of programmes and advisory services offered by Invest NI? [Base: Regional Office Network Customers n=100]

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In 2016, almost 3 in 5 Regional Office Network customers had sought financial assistance to help expand or develop their business, with the majority seeking assistance of less than £100K

### Seeking financial assistance by year

Have you sought financial assistance in the past 12 months to help you expand or develop your business (includes Growth Accelerator Programme)? [Base: Regional Office Network Customers n=100 ]

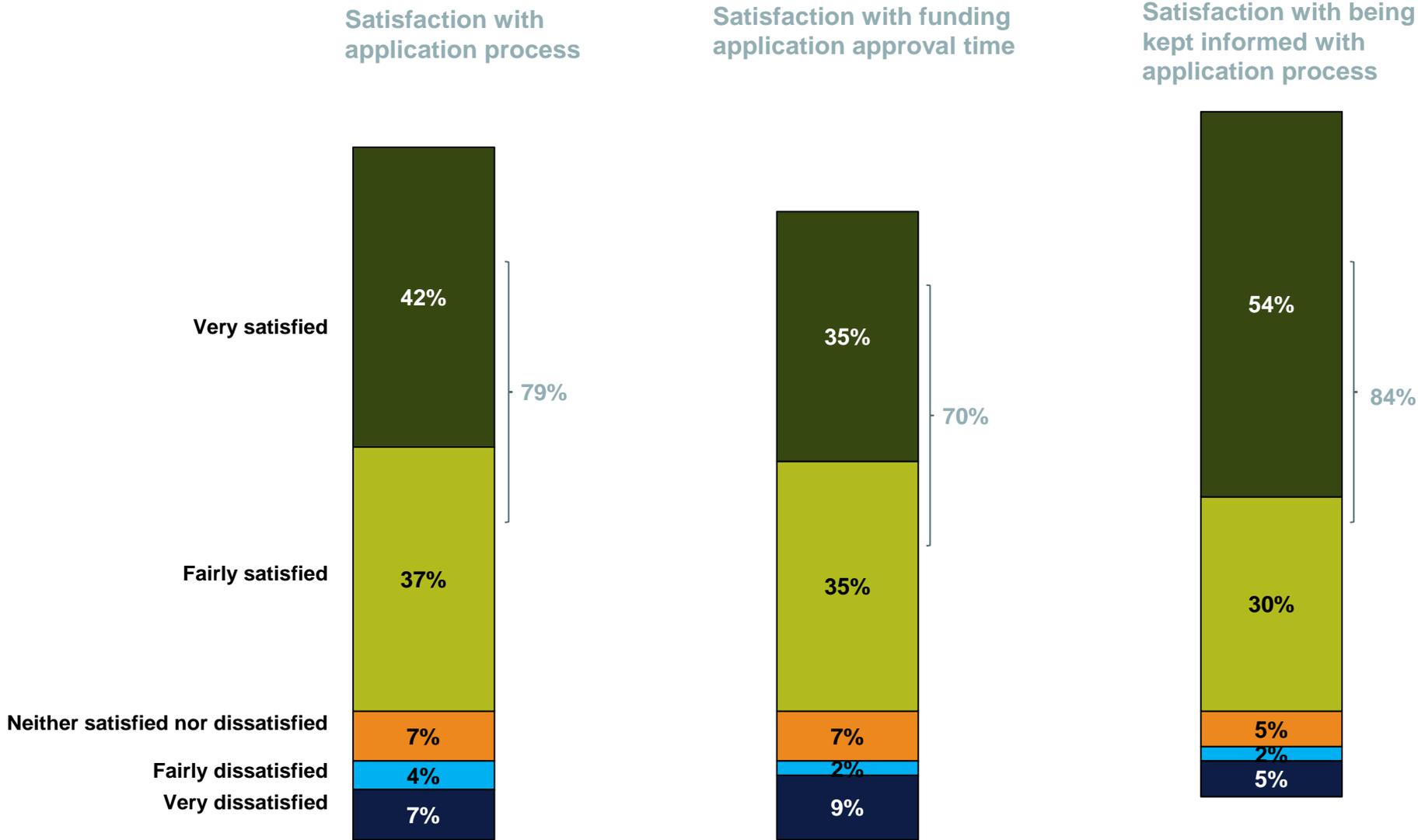


How much was the amount you sought?

[ Base: Regional Office Network Customers who have applied for financial assistance in the last 12 months n=57]



Being kept informed of the application process achieved high levels of satisfaction. However the application approval time could be improved as satisfaction levels were lower in comparison, with only 7 in 10 expressing some level of satisfaction.



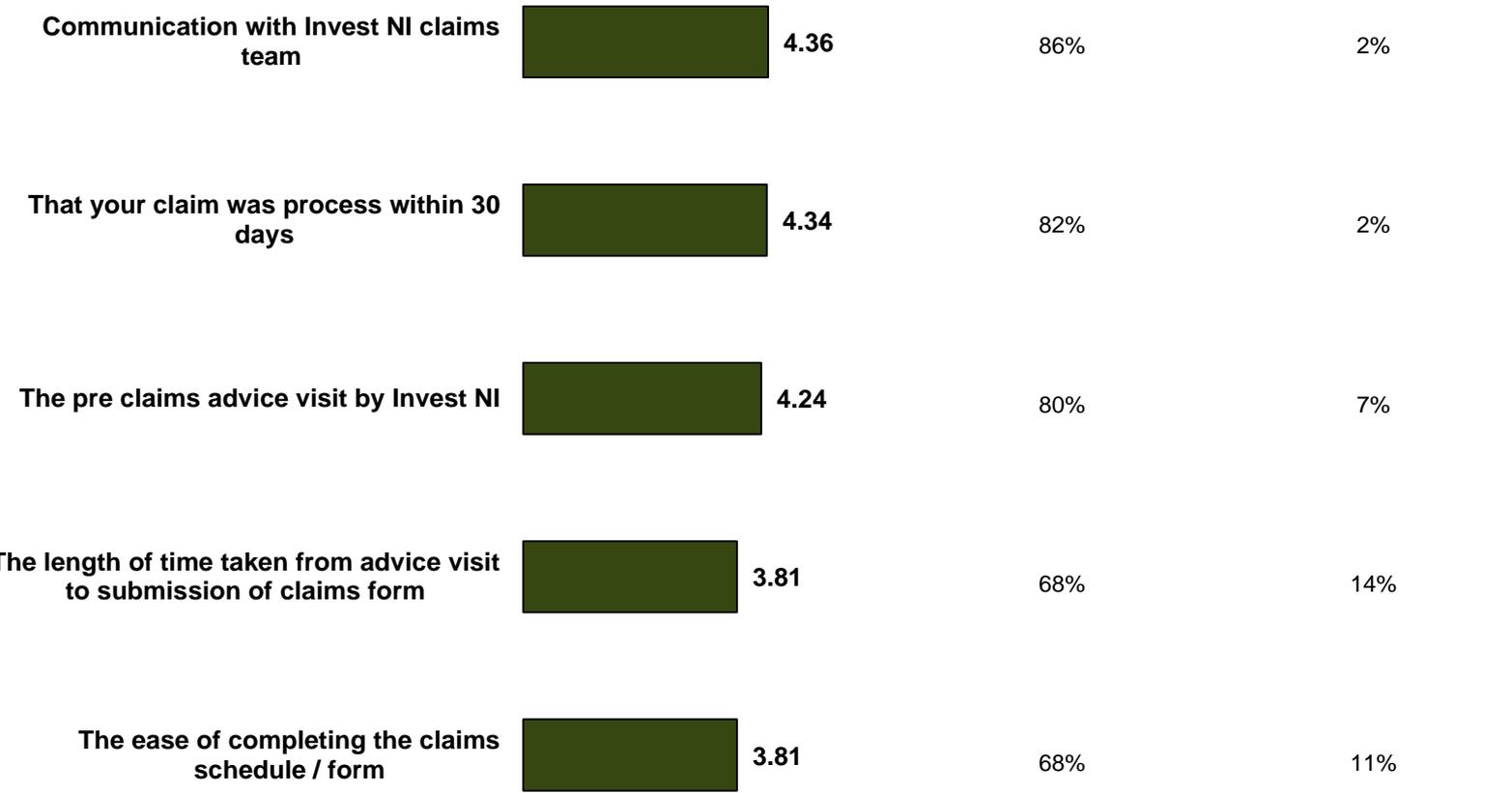
How satisfied or dissatisfied were you with the following aspects of applying for financial .....  
 [Base: Regional Office Network Customers who have applied for financial assistance in the last 12 months n=57]

Communication, processing of the claims and pre claims advice all achieved high levels of satisfaction of 80% or above. Those areas that fell below 80% were; the length of time from advice to submission and the ease of completing the schedules and forms.

**Satisfaction with aspects regarding claims process**

**Mean Score 2016**

Scale 1 (Very dissatisfied) to 5 (Very satisfied)



How satisfied or dissatisfied were you with each of the following aspects of the process?

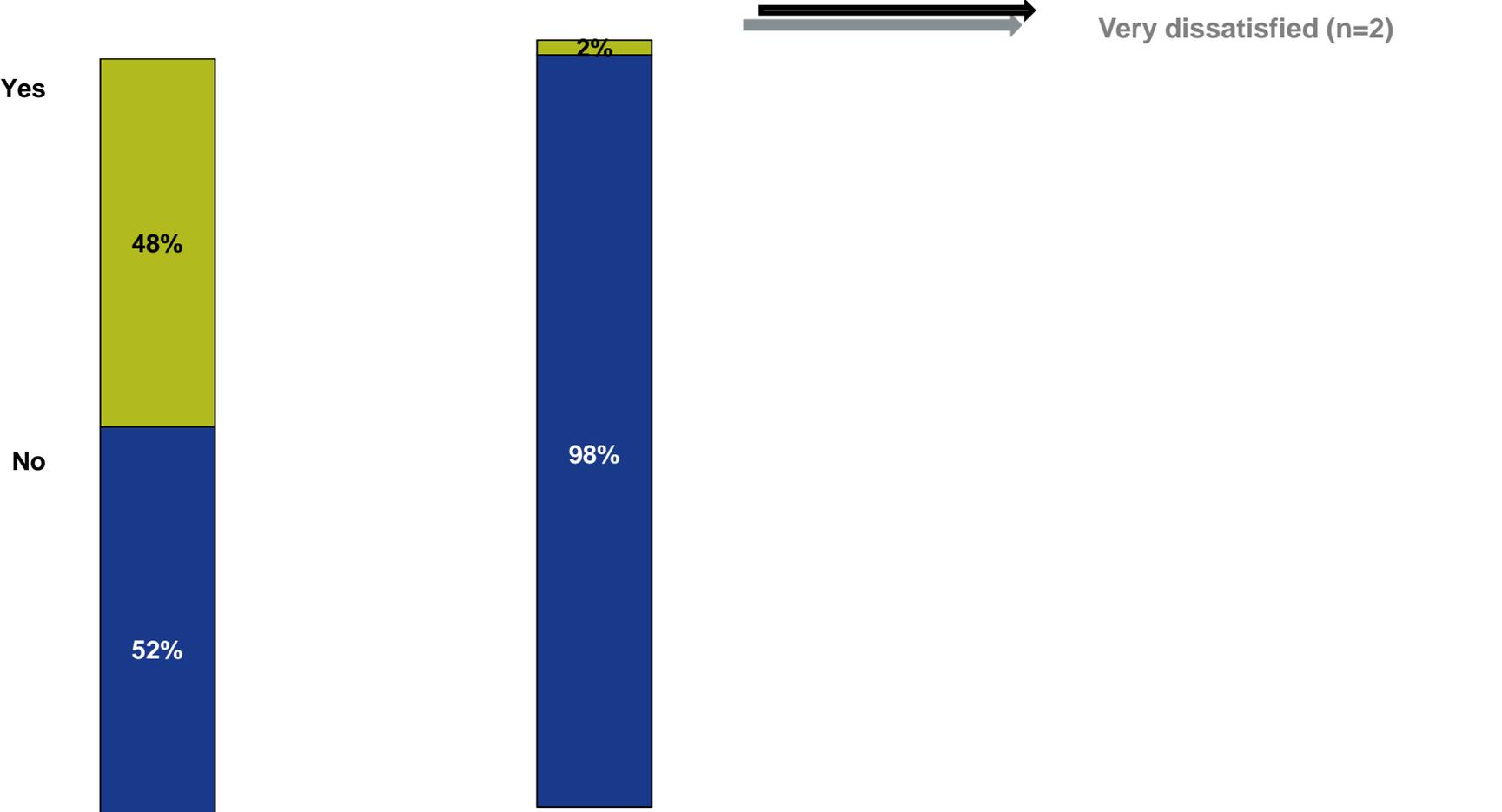
[ Base: All Regional Office Network Customers who have sought/claimed funding from Invest NI in the past 12 months n=44 ]

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- **Complaints & Feedback Process**
- Suggested Improvements

Only 2 of the 100 Regional Office Network customers had to make a complaint during the past year with both being very dissatisfied with how it was dealt with.

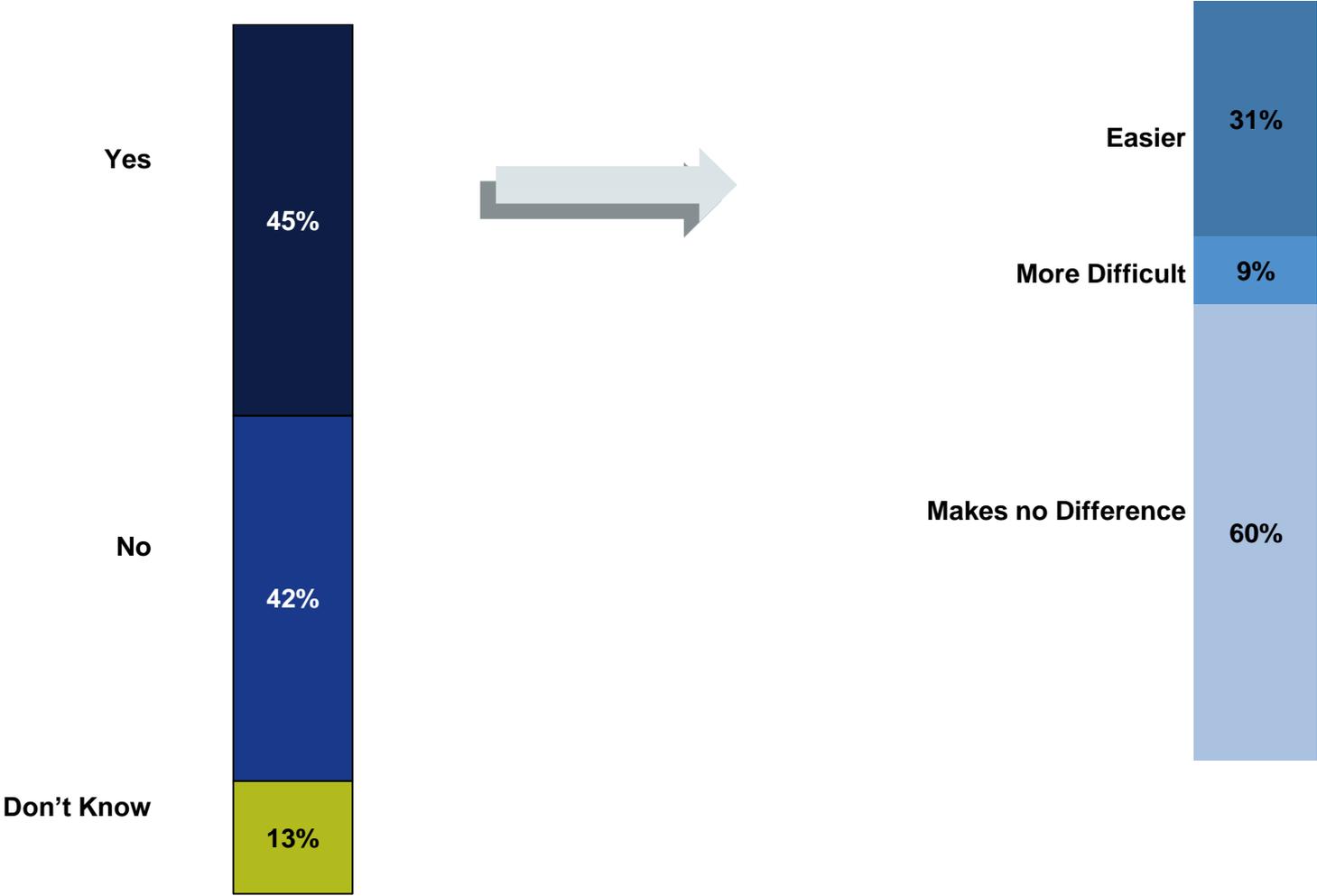


**Do you know that Invest NI has complaints and feedback process?**  
[ Base: Regional Office Network Customers n=100 ]

**Have you had to make a complaint to invest NI at any time during the past year?**  
[ Base: Regional Office Network Customers n=100 ]

**How satisfied or dissatisfied were you with the way this complaint was handled?**  
[ Base: All who made complaint =2 ]

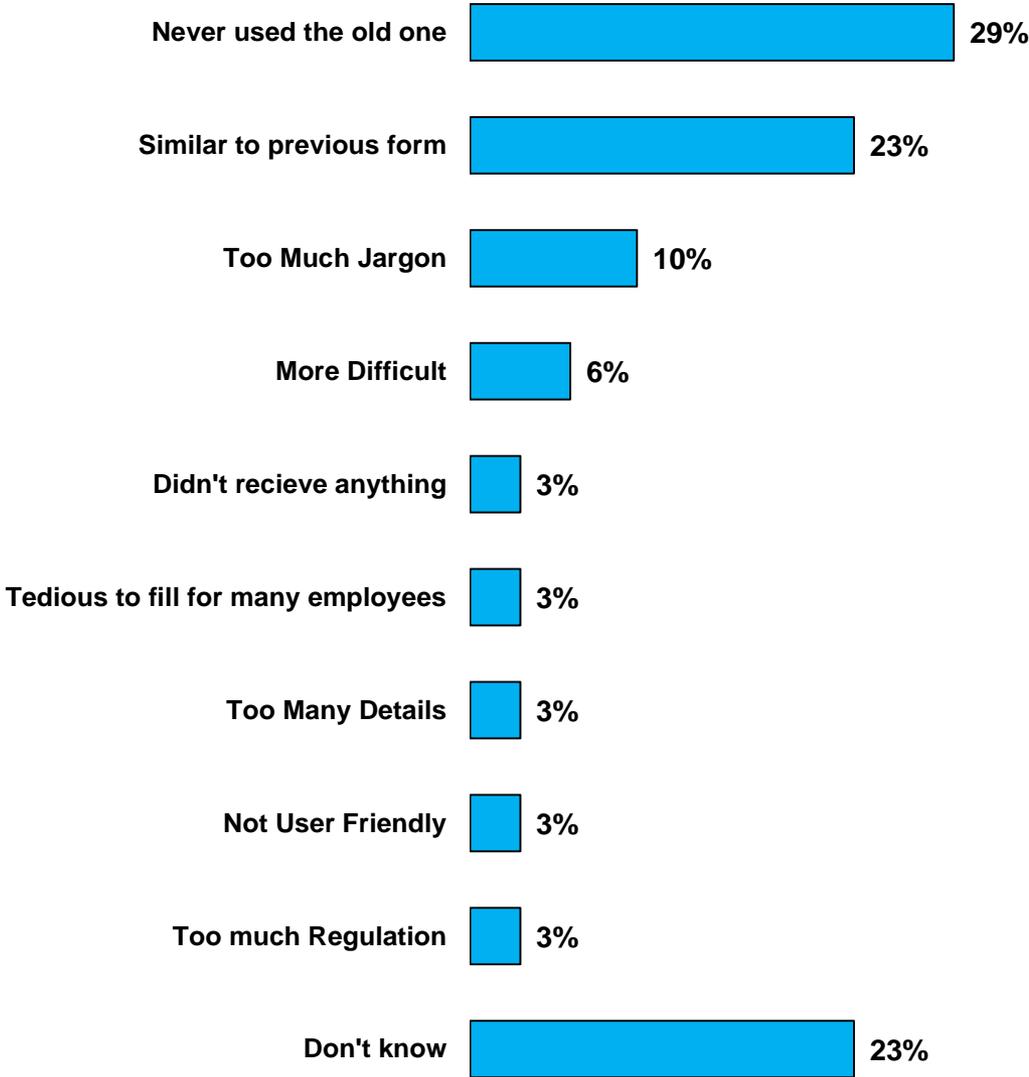
Some 3 in 10 who had used the new single claims form considered it easier to make claim utilising it.



The new Invest NI single claims form was introduced in August 2015. Have you used the new Invest NI single claims form since it was introduced? [ Base: Regional Office Network Customers n=100 ]

Does this form make it easier for you to make claims, more difficult or make no difference? [Base: All who used form n=45]

The main reason the new form was regarded as not making the claims process easier was due to either the similarities with the old form or no experience of using the old one.



Why does the form not make it easier for you to make claims?

[ Base: All not finding it easier n=31\* ]

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Suggestions of improvements Regional Office Network customers would like to see are highlighted below.

