

NetRegs Awareness Survey 2016 Northern Ireland Results

Draft Report

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Executive Summary

To be completed when report content finalised

1. Background and Objectives

1.1 Background

SEPA, the Scottish Environment Protection Agency, is a public sector agency that acts as the environmental regulator and flood warning authority in Scotland. In partnership with the Northern Ireland Environment Agency (NIEA), SEPA provides the NetRegs website NetRegs.org.uk, which offers free guidance to businesses in Scotland and Northern Ireland on corporate environmental responsibility, applicable key legislation and economical benefits related to adopting a responsible environmental approach to business. The website provides guidance for all businesses but is targeted mainly at small to medium-sized enterprises (SMEs).

The previous NetRegs website (NetRegs.gov.uk) catered for all four constituent countries of the UK and included input from the Environment Agency in England and Wales, which exited the partnership in 2010.

Since 2002, SEPA has commissioned a number of telephone surveys of SMEs in the UK to gauge awareness of the NetRegs website, knowledge of environmental legislation, and environmental performance. Over the course of the research, its scope has narrowed from 28 business sectors to focus on 15 in 2005/7 and then just 10 in 2009. This allowed for a more representative data set across each of the four countries that make up the UK.

The 2013 survey also focused on 10 business sectors but was only conducted in Scotland and Northern Ireland, in keeping with the exit of the Environment Agency from the NetRegs partnership. This used a telephone survey with an online option and a total of 412 responses were received. Because of the small sample size in 2013, the focus of comparisons in the current research is with the larger 2009 survey.

Progressive was commissioned to conduct the 2016 research among SMEs in Scotland and Northern Ireland, to provide an up to date picture of current attitudes and awareness in relation to the NetRegs website and environmental issues.

1.2 Aims and objectives

The research aimed to measure:

- Awareness and usage of the NetRegs website
- Attitudes towards respondents' own companies' environmental impact
- Internal systems, policies and/or behaviours relating to environmental management
- Perceived benefits attached to improved environmental performance
- Awareness of existing environmental legislation
- Previous interactions with external organisations regarding environmental issues
- The most effective channels through which information about environmental issues can be sent.

The research was designed to meet current information requirements while bearing in mind the desire to provide time series analysis to track change since the 2009 survey.

This report outlines 2016 findings from the survey of SMEs in Northern Ireland; an equivalent report is available outlining findings from Scotland. A combined report provides analysis comparing the data from each country and time series analysis has also been provided separately.

2. Method and Sample

2.1 Introduction

A total of 506 interviews were conducted with Northern Irish SMEs during February 2016. The survey was conducted by Progressive's telephone interviewers using Computer-Aided Telephone Interviewing (CATI). The questionnaire was largely based on the 2009 version although it was amended slightly to include new areas of interest to both SEPA and NIEA. A copy of the survey questionnaire is included in Appendix 1.

2.2 Sampling

The sample was designed to ensure a good spread of SMEs were included in relation to industry sector and business size. The survey script also ensured that interviewers spoke to the person in the business who deals with environmental issues and decisions, such as waste management or water and energy use. The final sample profile is outlined in Table 1. The sample was designed to focus on agriculture, construction, healthcare, hotels and restaurants, and transport. These were also the core sectors included in the 2009 survey.

Table 1: Sample profile

Industry sector	No.	%
Agriculture	81	16%
Construction	81	16%
Healthcare	79	16%
Hotels and restaurants	82	16%
Transport	53	10%
Education	42	8%
Equipment and machinery	18	4%
Financial services	21	4%
Food and drink manufacturer	19	4%
Retail and wholesale	30	6%
Business size	No.	%
<10	273	54%
10-49	151	30%
50+	82	16%

Respondent Job Title	No.	%
Owner/MD/Partner	271	54%
Office manager/personnel manager/Admin/Secretary/PA etc	90	18%
Director/Company secretary	55	11%
Works/production/site/farm manager	23	5%
Technical manager/officer (e.g. health and safety, quality, contracts)	16	3%
Environmental manager/officer	7	1%
Other	44	9%

Base (all): 506

A note on business size

A sample of businesses in Northern Ireland was purchased to be used as the sampling frame for the research. This sample had business size and sector detailed for each contact on the file and this information was used for quota control purposes, to ensure a good spread of businesses was included in the research. However, a question was also asked in the survey about the number of employees the business had, and this data has been used for analysis and reporting (rather than the business size detailed on the sample file). In instances where the respondent did not know their business size, the sample categorisation information has been used. The overall spread is broadly similar, although there are slightly more very small businesses (<10 employees) and slightly fewer mid-size businesses (10-49 employees) in the Northern Irish sample when using respondents' own estimates compared to the quota targets derived using the sample file data.

In the 2016 research, it was agreed not to screen businesses of 250+ employees out of the survey, as had been the case in 2009. However, the final number of organisations over 250 was small (11 respondents in the Northern Irish sample).

The overall sample size of 506 provides a dataset with a margin of error of between $\pm 0.87\%$ and $\pm 4.36\%$, calculated at the 95% confidence level (the market research industry standard)¹.

2.3 Analysis and reporting

This report outlines the 2016 survey findings for the whole sample, providing analysis by industry sector (with a focus on the core sectors noted earlier, where larger sample sizes allow sub-group analysis) and business size.

Raw data and cross-tabulations have been provided under separate cover.

Reporting conventions

Throughout this report, any differences noted between sub-groups are statistically significant to the 95% confidence level.

Standard notification is used in tables with '*' used to indicate results of less than 1% and '-' used to indicate no respondents gave a particular answer. For ease of reading the results, '1%' and '2%' notations have been left off the charts.

For questions using ratings scales, mean scores have been calculated as follows:

- Usefulness: scored from 1 (of no use) to 4 (very useful) or from 1 (not at all useful) to 4 (very useful), depending on the question wording
- Likelihood: scored from 1 (very unlikely) to 4 (very likely)
- Satisfaction: scored from 1 (very dissatisfied) to 4 (very satisfied).

Where such mean scores are presented, these exclude all 'don't know / not applicable' responses.

¹ Please note that the survey did not use random sampling which means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined should therefore be treated as indicative, based on an equivalent probability sample.

3. Research Findings

3.1 Measures to address environmental issues

Measures taken to prevent or reduce harm to the environment

Respondents were asked what, if any, practical measures their organisation had ever introduced aimed at preventing or reducing harm to the environment. Interviewers first coded respondents' spontaneous, top of mind responses and then prompted them with a list of measures. Across the sample as a whole, 74% spontaneously mentioned at least one measure their business had implemented. However, when prompted with a list of possible measures, this figure rose to 92% overall.

As illustrated by Table 2, there was some variation in responses across core industry sectors and by business size. The smallest organisations were least likely to report implementing any of these measures, either spontaneously or when prompted. Businesses in the transport sector were least likely to have taken any practical measures, although 79% did identify measures taken when prompted. The hotel and restaurant sector was the most likely to think of any actions taken to reduce harm to the environment, both spontaneously and when prompted.

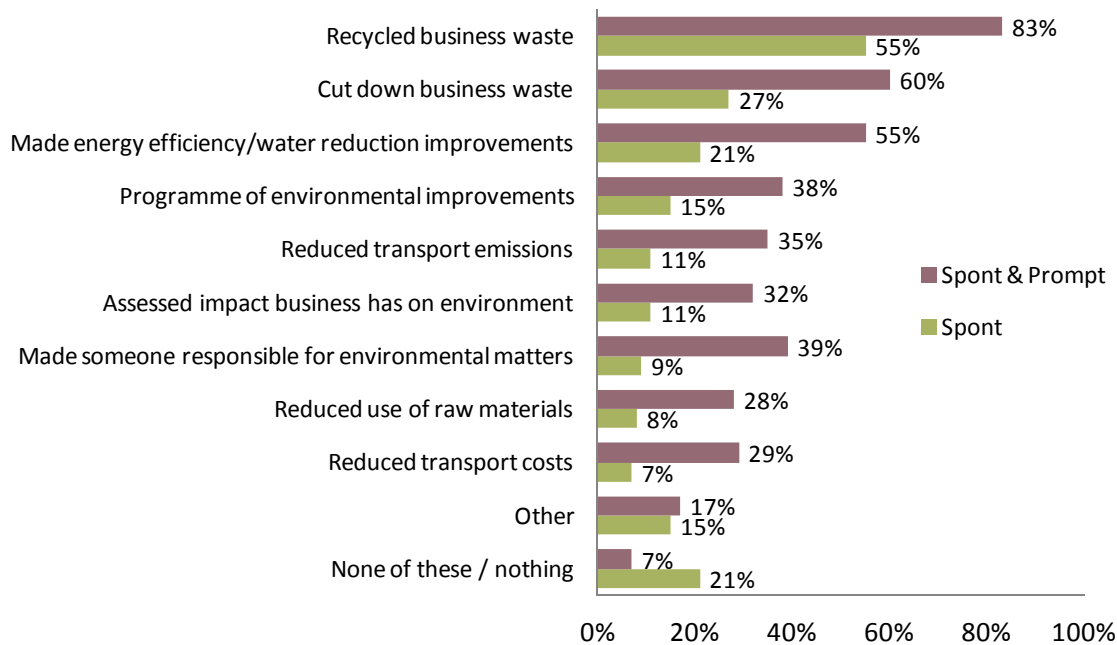
Table 2: Whether companies reported introducing practical measures aimed at preventing or reducing harm to the environment (spontaneous and all responses)

Business size	Proportion taking at least 1 action		Base
	Spontaneous	Spont & prompt	
<10	69%	89%	273
10-49	76%	95%	151
50+	87%	98%	82
Core sector			
Agriculture	77%	93%	81
Construction	69%	89%	81
Healthcare	72%	92%	79
Hotels & restaurants	84%	98%	82
Transport	62%	79%	53
Sample average	74%	92%	506

Figure 1 shows the detailed responses to this question; as can be seen here, the most common spontaneous responses were recycling business waste (mentioned by 55%), cutting down business waste (27%) and making energy efficiency or water reduction improvements (21%). Relatively small proportions spontaneously mentioned any other kind of activity to prevent or reduce harm to the environment.

However, upon prompting with the list of practical measures, a higher proportion reported undertaking each of these activities – with the majority reporting recycling (83%), cutting down waste (60%) and making energy efficiency/water reduction improvements (55%). While a fifth (21%) of respondents initially said they had not introduced any practical measures to reduce their impact on the environment, when prompted with the list of possible measures this fell to 7%.

Figure 1: Practical measures introduced aimed at preventing or reducing harm to the environment (spontaneous and prompted)



Base (all): 506

‘Other’ responses were given by 53 respondents spontaneously; the main categories of responses mentioned by 5 or more people were:

- Better waste storage/disposal (mentioned by 9 respondents)
- Solar panels (6)
- Use of third party advice/guidelines (5).

Respondents from the smallest organisations were significantly less likely than those from medium or larger organisations to mention a number of the measures, including assessing their impact on the environment, carrying out a programme of improvements, making someone in the company responsible for environmental matters, making energy efficiency or water reduction improvements, cutting down waste and recycling waste.

As detailed in Table 3, there was also some variation in responses across the core industry sectors. For example, construction businesses were most likely to report reducing their use of raw materials (41%), while hotels and restaurants were more likely than others to report recycling business waste (94%) or making energy efficiency / water reduction improvements (68%). Those from transport companies were the most likely to say they had not introduced any of these measures (21%).

Table 3: Practical measures undertaken by core industry sector

Practical measures to protect / reduce harm (spontaneous and prompted)	Agriculture	Construction	Healthcare	Hotels & restaurants	Transport
Assessed impact business has on the environment	36%	31%	22%	28%	19%
Carried out a programme of environmental improvements	36%	33%	29%	32%	26%
Made someone in the company responsible for environmental matters	32%	40%	38%	45%	40%
Made any energy efficiency or water reduction improvements	58%	44%	56%	68%	32%
Cut down business waste	57%	67%	56%	68%	45%
Recycled business waste	77%	84%	84%	94%	64%
Reduced transport emissions	28%	44%	10%	16%	51%
Reduced transport costs	23%	43%	9%	13%	32%
Reduced use of raw materials	28%	41%	14%	23%	13%
Other environmental activity	14%	7%	10%	16%	11%
None of these / nothing	7%	11%	8%	2%	21%
Base	81	81	79	82	53

Reasons for not taking measures to reduce harm to the environment

Those who had never introduced any measures to reduce harm to the environment were asked what had prevented them from doing so. As shown in Table 4, the most common reason, given by a third of these respondents (33%) was that they did not have time to think about it or it is not a business priority. Around a quarter (23%) said they had just never thought about it, and a similar proportion (20%) said they did not know what actions to take. However, the small base size for this question should be noted (n=40).

Table 4: Reasons for not taking measures to reduce harm to the environment

Industry sector	%
Don't have time to think about it / it is not a priority for the business	33%
Have never thought about it	23%
Don't know what actions to take	20%
It is too expensive / cost issues	5%
Other	10%
Don't know	25%
Base	40*

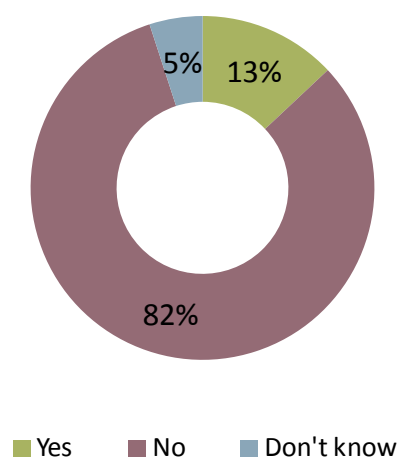
* Caution: small base

3.2 Implementation of an Environmental Management System (EMS) or Environmental Policy

Whether companies have an Environmental Management System

Across the sample as a whole, 13% said their company had an Environmental Management System such as an ISO 14001, BS 8555 or Green Dragon standard (see Figure 2). Five per cent said they did not know, but most (82%) said they did not have an EMS.

Figure 2: Whether companies have implemented an Environmental Management System



Base (all): 506

The proportion of companies with an EMS varied in relation to business size and core industry sector, as outlined in Table 5. Those with fewer than 10 employees were less likely to have an EMS (7%), compared to medium sized (17%) and larger organisations (26%). Respondents working in the construction industry were considerably more likely to report having an EMS (25%) than respondents working within any of the other sectors.

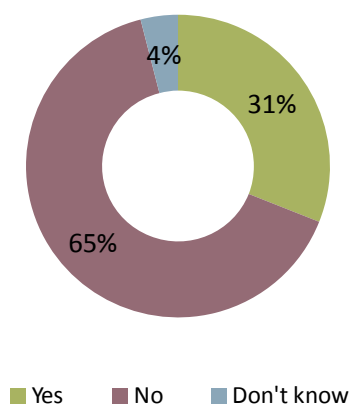
Table 5: Whether companies had an EMS by business size and core industry sector

Business size	Proportion with an EMS	Base
<10	7%	273
10-49	17%	151
50+	26%	82
Core sector		
Agriculture	6%	81
Construction	25%	81
Healthcare	10%	79
Hotels & restaurants	9%	82
Transport	11%	53
Sample average	13%	506

Whether companies have an Environmental Policy

Those who did not have an EMS in place were asked if they had an Environmental policy and around three in ten (31%) said yes (see Figure 3).

Figure 3: Whether companies without an EMS have an environmental policy



Base (all who did not have an EMS): 440

Taking these two questions together, 40% of the sample overall had either an EMS or an environmental policy in place.

Again, there was some variation between businesses in terms of size and sector in relation to having this kind of policy in place. As shown in Table 6, the largest organisations were most likely to have an EMS or environmental policy (65%), as were those in the agriculture (42%), construction (42%) and healthcare (41%) sectors.

Table 6: Whether companies had an EMS/environmental policy by business size and core industry sector

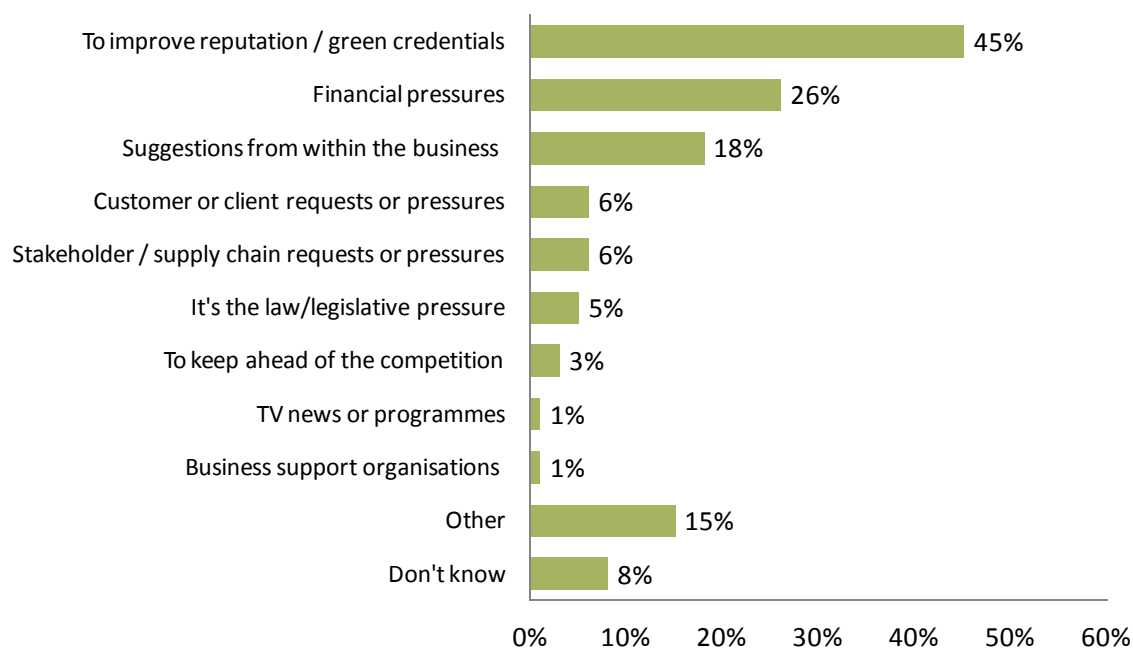
Business size	Proportion with EMS / environmental policy	Base
<10	28%	273
10-49	48%	151
50+	65%	82
Core sector		
Agriculture	42%	81
Construction	42%	81
Healthcare	41%	79
Hotels & restaurants	30%	82
Transport	32%	53
Sample average	40%	506

What prompted improvements to environmental performance

Respondents who had mentioned taking any actions to improve their environmental performance, or who had an EMS or environmental policy in place, were asked what had prompted them to take these steps. As illustrated in Figure 4, improving their reputation / green credentials was the most common prompt to take action, mentioned by 45%. Financial pressures (26%) and suggestions from

within the business (18%) were also commonly reported reasons for taking steps to improve environmental performance.

Figure 4: What prompted respondents to take steps to improve their environmental performance



Base (all who had taken at least one action to improve performance, and/or who had an EMS or environmental policy): 467

In total, 69 respondents mentioned an 'other' response to this question. The most common reasons given were:

- Comments relating to a general awareness of environmental issues and/or the importance of the environment (mentioned by 35 respondents)
- Comments relating to greater profit / improved business (8)
- Mentions of specific policy initiatives (6).

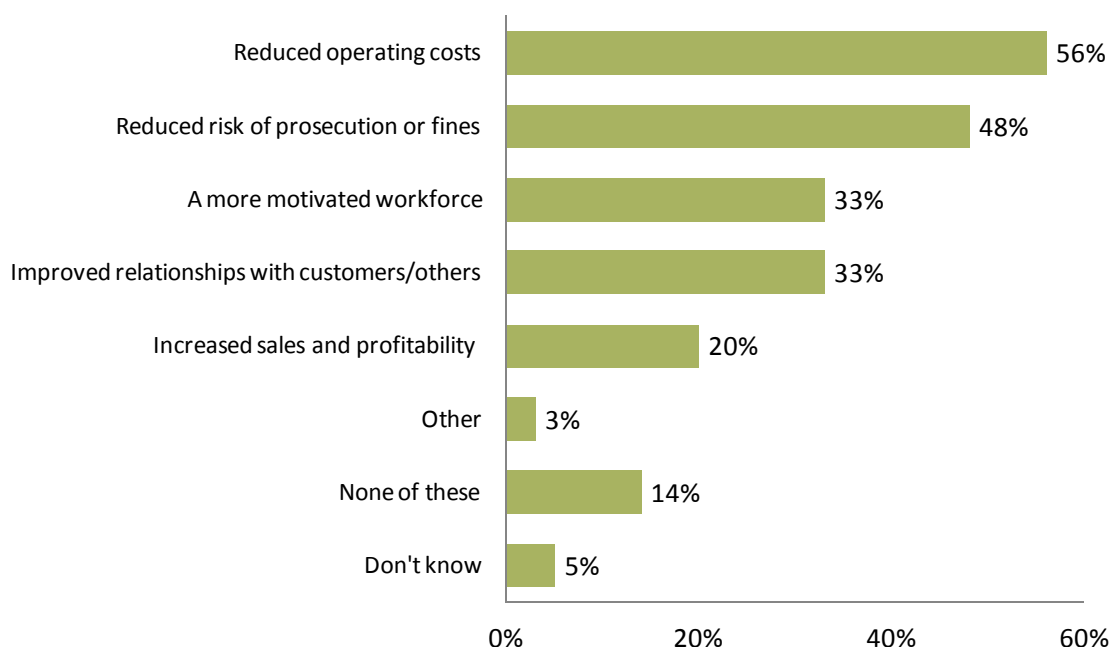
The smallest organisations were least likely to mention suggestions from within the business (12% of those with <10 employees said this, v 25% of medium or larger businesses) and customer or client requests or pressures (5% v 13% of 50+).

In relation to the core industry sectors, healthcare business were the most likely to mention suggestions from within the business (30%), respondents from the construction sector (50%) and hotels/restaurants (48%) were the most likely to mention improving their reputation / green credentials, and those from agriculture businesses were most likely to highlight legislative requirements (20%).

Benefits of making environmental improvements

These respondents were also asked whether their business had benefited as a result of taking steps to improve environmental performance. The most commonly reported benefits were reduced operating costs (mentioned by 56%) and reduced risk of prosecution or fines (48%) – see Figure 5.

Figure 5: Benefits to the business of environmental improvements



Base (all who had taken at least one action to improve performance, and/or who had an EMS or environmental policy): 467

There was very little difference between businesses of different sizes in terms of the reported benefits; the only difference was that the smallest organisations were least likely to mention reduced operating costs (47% of <10 v 64% 10-49 and 68% 50+).

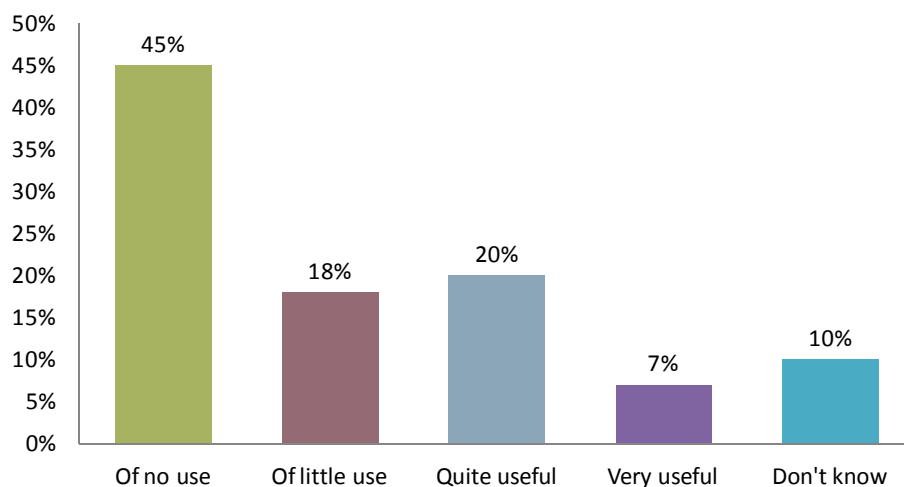
Among the core industry sectors, the following patterns emerged:

- Hotels and restaurants (60%) were the most likely of all the core sectors to report reduced operating costs
- Businesses from the construction sector were the most likely to report increased sales and profitability (32%), improved relationships with customers/others (53%) and reduced risk of prosecution or fines (58%).

Perceived usefulness of an EMS or Environmental Policy

The survey also asked those **who did not** have an EMS or environmental policy how useful they felt such a policy would be. The majority did not feel this would be useful (64% overall said it would be of no use or of little use). Only 26% felt it would be quite or very useful, although 10% said they did not know (see Figure 6).

Figure 6: How useful an EMS or environmental policy would be



Base (all **without** an EMS or environmental policy): 304

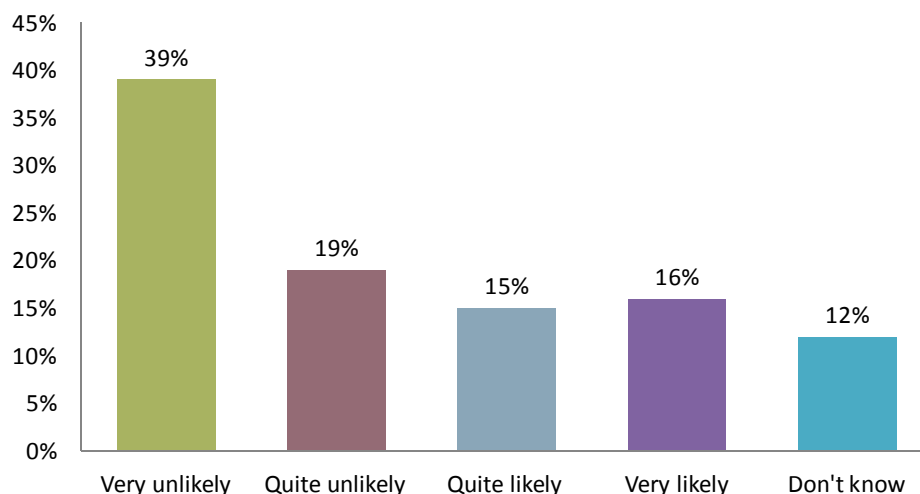
There was variation in responses to this question by business size, with the smallest organisations being significantly more likely than others to report an EMS or environmental policy would be of little or no use (72% of those with fewer than 10 employees said this, compared to 49% of 10-49 and 48% of 50+).

Of the core industry sectors, businesses who did not already have a policy in place in the hotels and restaurants sector or in healthcare were the most likely to think this would be useful (32% of respondents from both of these sectors said it would be quite or very useful).

Likelihood to invest in environmental performance

All respondents were asked how likely they were to invest money in improving their environmental performance over the next 12 months. More than half (57%) reported that they were very or quite unlikely to invest, while 31% said they were quite or very likely to do this, and 12% said they did not know (see Figure 7).

Figure 7: Likelihood to invest in environmental performance in the next 12 months



Base (all): 506

There was a clear pattern in responses to this question based on the size of the organisation, the largest organisations being most likely to predict investment in their environmental performance (50% of those with 50+ employees said it was very or quite likely) compared to the medium sized firms (29% of those with 10-49 employees) and the smallest organisations (26% of those with <10).

3.3 Awareness of the environment and legislation

Activities that may harm the environment

Respondents were asked what activities, if any, their organisation undertakes which could be regarded as harmful to the environment. Across the whole sample, 29% spontaneously mentioned at least one activity their business did which could be regarded as harmful to the environment, although this rose to 72% when prompted with a list of potentially harmful activities.

There was some variation in responses across core industry sectors, as outlined in Table 7. Transport companies appeared to have the best top of mind awareness of potentially harmful activities; 53% spontaneously cited at least one. When prompted with a list of activities the highest proportions of respondents stating their company undertakes at least one were within transport (83%) and constructions (84%) companies. There were not any significant variations in findings by size of company.

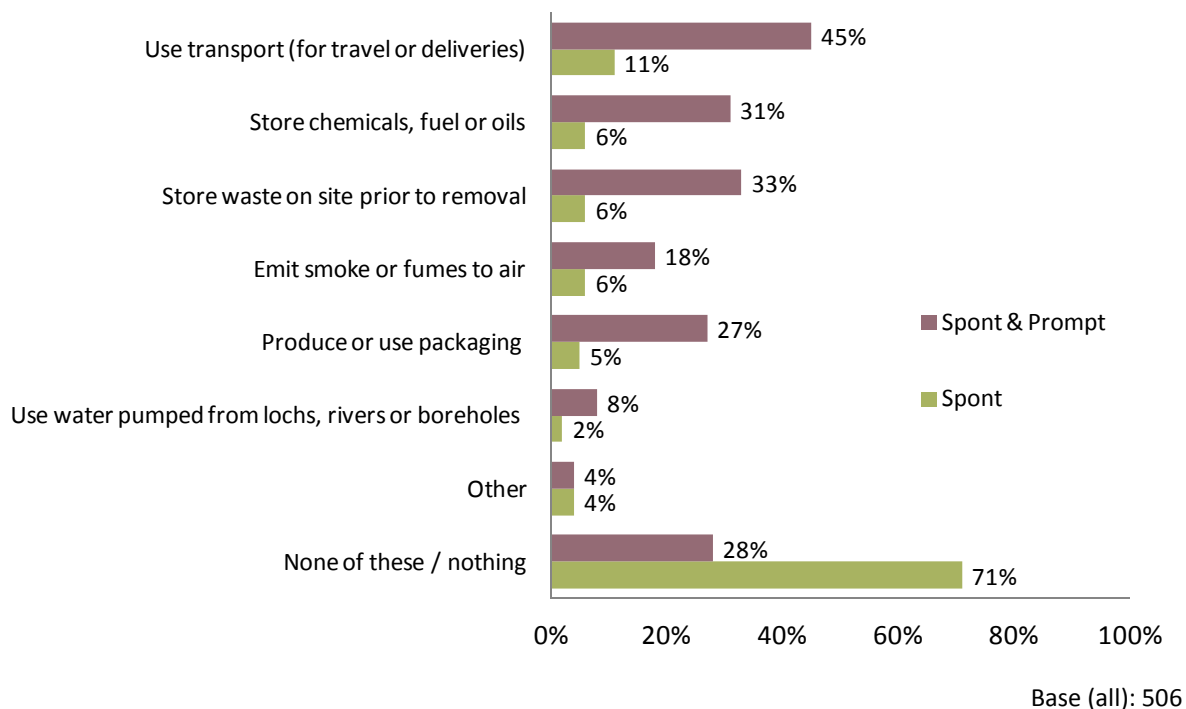
Table 7: Whether companies reported undertaking harmful activities by business size and core industry sector (spontaneous and all responses)

Business size	Proportion undertaking at least 1 harmful activity		Base
	Spontaneous	Spont & prompt	
<10	26%	70%	273
10-49	33%	75%	151
50+	34%	76%	82
Core sector			
Agriculture	33%	78%	81
Construction	35%	84%	81
Healthcare	23%	58%	79
Hotels & restaurants	18%	68%	82
Transport	53%	83%	53
Sample average	29%	72%	506

Figure 8 shows the detailed responses to this question. The majority (71%) said 'none' when asked to spontaneously cite activities their company undertakes which could be harmful to the environment. The most common activity mentioned spontaneously was using transport for travel or deliveries, mentioned by 11% spontaneously.

However, when prompted with the list, a higher proportion mentioned each of these harmful activities. Taking the spontaneous and prompted responses together, 45% mentioned transport, 33% said they store waste on site prior to removal, 31% store chemicals, fuels or oils and 27% reported producing or using packaging. Just over a quarter (28%) reported doing none of these things even when prompted with the list.

Figure 8: Activities undertaken which could be regarded as harmful to the environment (spontaneous and prompted)



Among the 19 respondents who spontaneously mentioned an 'other' activity that may harm the environment, the most common responses were:

- Electricity overuse/heating (mentioned by 4 respondents)
- References to waste collection (2)
- Use of chemicals/pesticides on land (2)
- Reference to livestock/slurry (2)
- Reference to vehicles (2).

Taking spontaneous and prompted responses together, the smallest organisations were the least likely to report storing waste on site prior to removal (25% <10 said they did this, v 41% of 10-49 and 49% of 50+), producing or using packaging (20%, v 34% and 40%) or emitting smoke or fumes (15%, v 26% of the largest organisations).

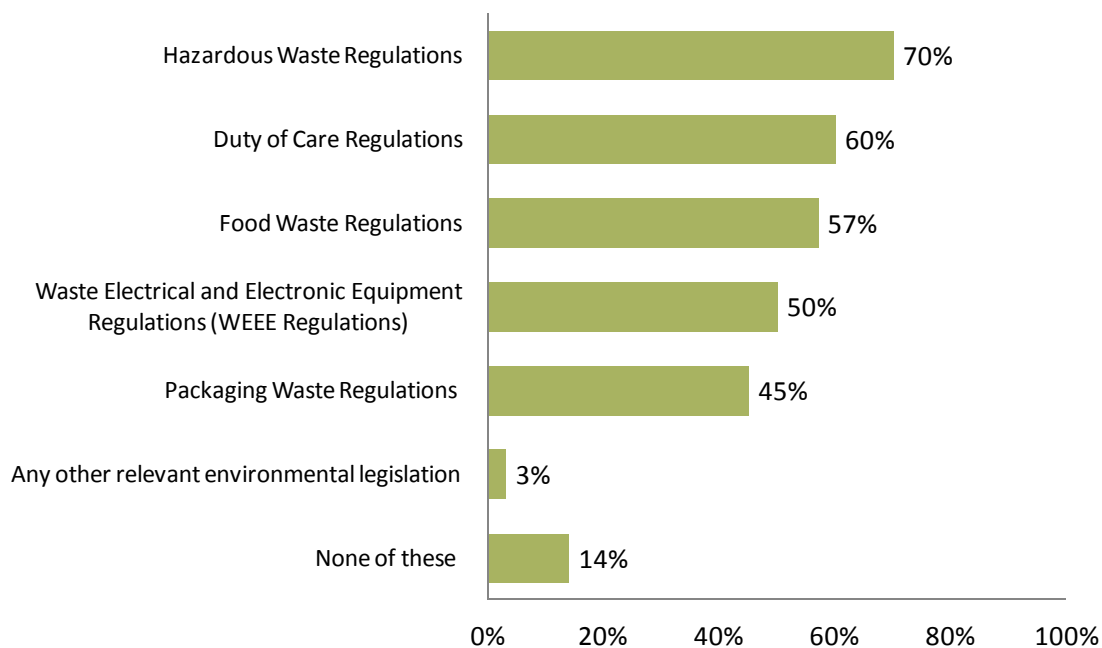
Perhaps unsurprisingly, the activities undertaken varied by industry sector. Among the core industry sectors, the following patterns emerged:

- Hotels and restaurants were the most likely to store waste on site prior to removal (40%), or produce or use packaging (37%)
- Transport companies and construction businesses (both 75%) were the most likely to use transport for travel or deliveries
- Transport companies were also the most likely to report emitting smoke or fumes (40%)
- Agriculture businesses were the most likely to report using water pumped from lochs, rivers or boreholes (32%) and to store chemicals, fuels or oils (49%).

Awareness of environmental regulation and legislation

The survey also addressed awareness of relevant legislation; respondents were therefore asked which of the following environmental regulations / legislation they had heard of. Awareness was highest of the Hazardous Waste Regulations (70%), Duty of Care Regulations (60%) and Food Waste Regulations (57%). Fourteen per cent said they had not heard of any of these regulations.

Figure 9: Environmental regulation or legislation respondents had heard of



Base (all): 506

There was a very clear pattern in responses across business size for this question, with the largest organisations being the most aware of each of the regulations / legislation. Overall, 18% of organisations with fewer than 10 employees had not heard of any of these regulations, compared to just 5% of those with 50+ employees.

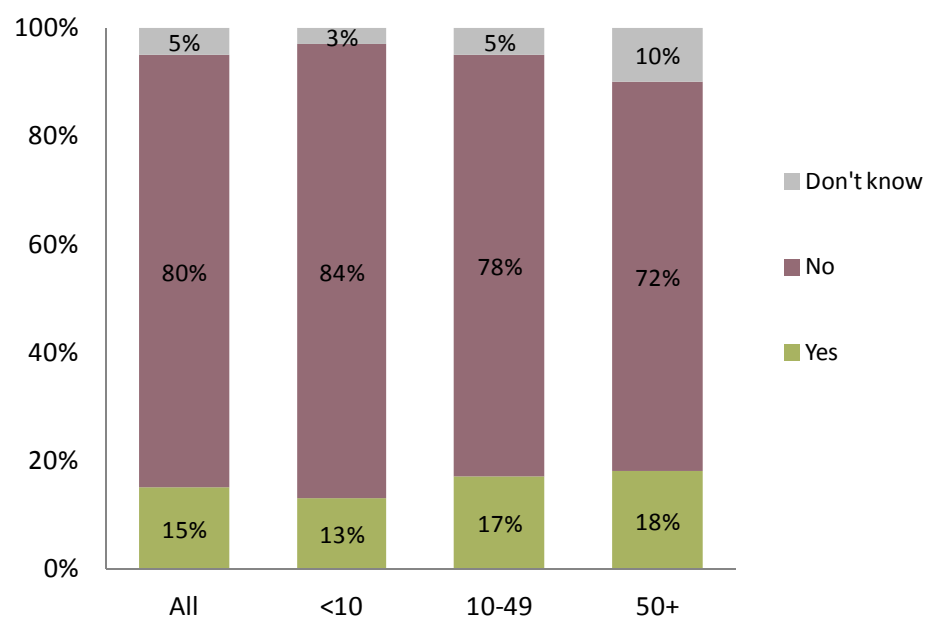
Among the core industry sectors:

- Hotels and restaurants were the most likely to be aware of the Food Waste Regulations (73%)
- Construction businesses (58%) and those in healthcare (56%) were the most likely to have heard of the WEEE regulations
- Healthcare businesses were the most likely to be aware of Hazardous Waste Regulations (84%)
- Respondents from the transport sector (26%) were the most likely to say they had not heard of any of these regulations or legislation.

Permits, licences and exemptions

All respondents were asked whether their business requires a permit, licence or exemption from NIEA in order to carry out its activities. Overall, 15% confirmed that this is a requirement (see Figure 10). This finding was broadly consistent across the different sizes of business in the sample (differences are not statistically significant).

Figure 10: Whether respondents' companies need a permit, licence or exemption from NIEA



Base (all): 506

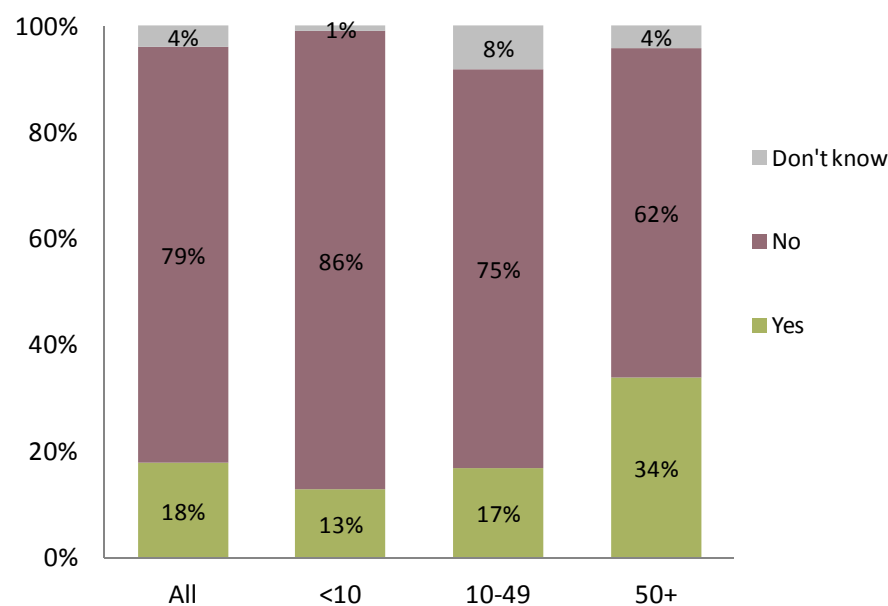
Among the core industry sectors, agriculture and construction businesses were the most likely to report needing a permit (22% and 21% respectively), while hotels and restaurants were the least likely to say this (7%).

3.4 Sources of information, advice and support

Contact with business support organisations

Respondents were asked whether they had ever been in contact with any business support organisations to discuss environmental issues, and overall 18% said that they had (see Figure 11). The largest organisations were more likely to have sought support (34% of companies with 50+ employees) than the medium sized (17%) and smaller companies (13%).

Figure 11: Contact with business support organisations to discuss environmental issues



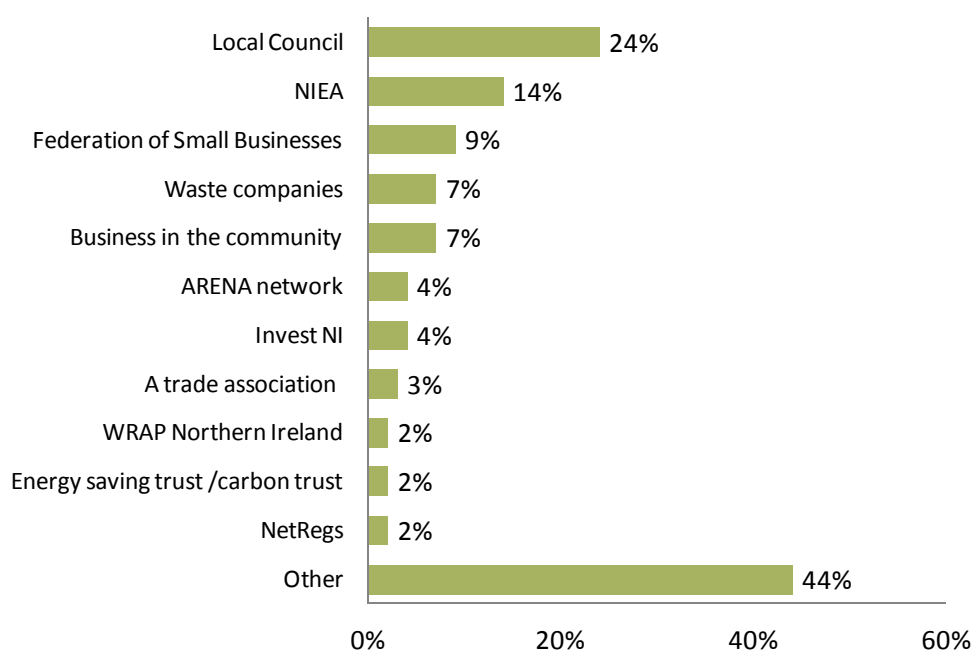
Base (all): 506

Among the core industry sectors, those from the hotel/restaurant sector (21%) and agriculture sector (20%) were most likely to have contacted some kind of business support organisation, while transport businesses were the least likely to have done this (2%).

Business support organisations contacted

Those respondents who had sought support or advice were asked to specify which organisations they had contacted. The most commonly mentioned organisation by these respondents was the local council (24%), followed by NIEA (14%). A large proportion of respondents (44%) also mentioned other support organisations not listed, although there was no consistent pattern to emerge in this data. Instead a wide range of specific organisations were listed. A full list has been provided separately.

Figure 12: Business support organisations contacted



Base (all who had contact with a business support organisation): 90

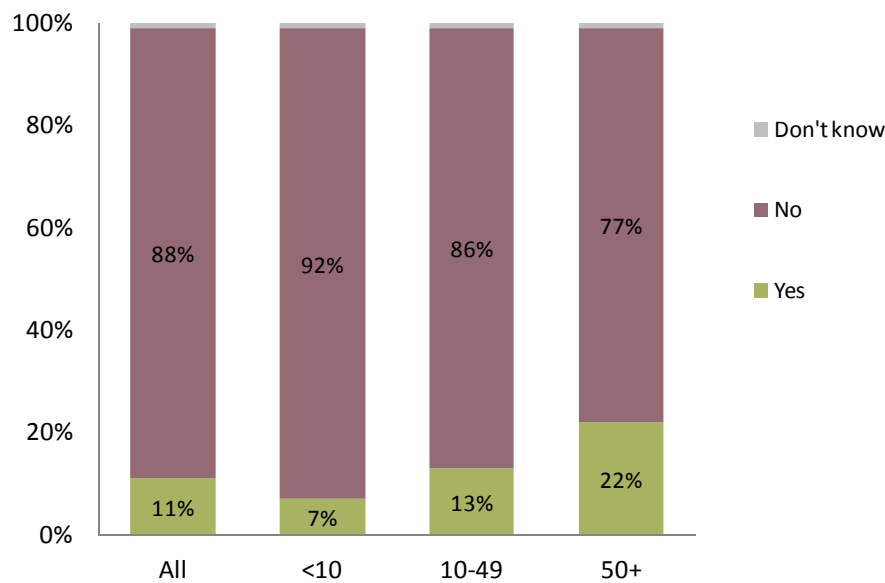
The only significant difference seen in the sub-group analysis for this question was that the smallest businesses were less likely than medium sized businesses to have contacted their local council (42% of those with 10-49 employees, compared to 11% of those with fewer than 10).

3.5 Awareness and use of NetRegs

Awareness of NetRegs

A number of questions were asked specifically about the NetRegs website. Firstly, respondents were asked whether they had heard of the NetRegs website. As shown in Figure 13, only a minority of 11% of the total sample was aware of NetRegs, although awareness was higher among the larger organisations (22% had heard of it, compared to only 7% among the smallest companies).

Figure 13: Whether respondents had heard of the NetRegs website



Base (all): 506

The proportions who had heard of NetRegs were broadly consistent among the core industry sectors, with the exception of those in the hotels and restaurants sector who were less likely than any others to have heard of the website (2%).

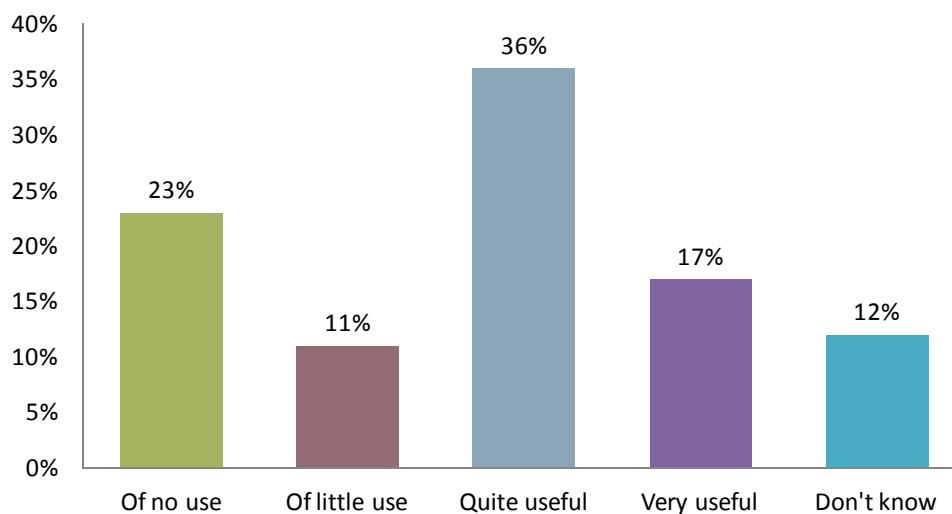
Perceived usefulness of NetRegs

Those who had not heard of NetRegs were given the following description:

“The NetRegs site provides free, plain English guidance to help small and medium sized businesses comply with their environmental responsibilities”.

They were then asked how useful their organisation would find this service. As shown in Figure 14, the majority (53%) thought this would be quite or very useful. Thirty four per cent thought it would be of little or no use, while 12% said they didn’t know.

Figure 14: How useful respondents think NetRegs would be



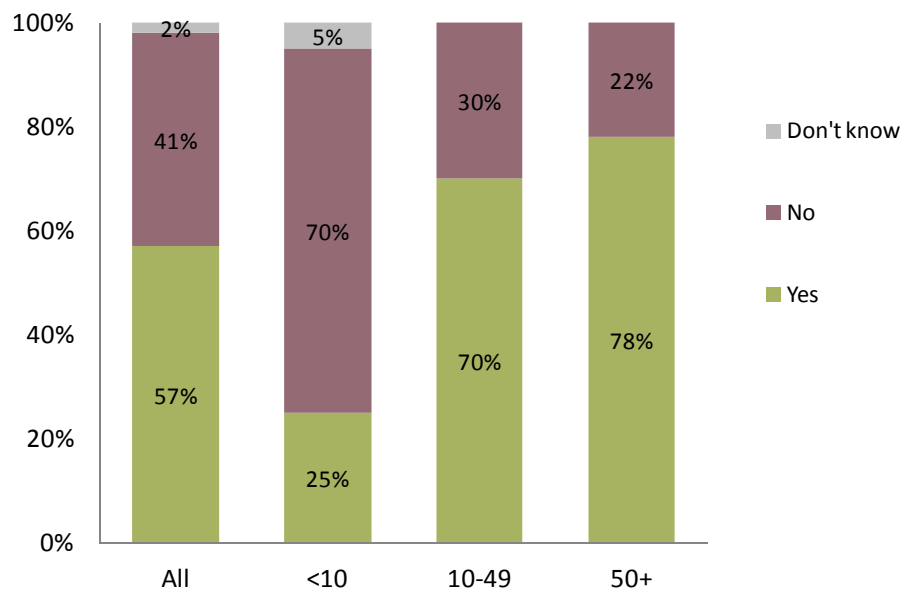
Base (all not aware of NetRegs): 473

There was no significant difference in perceptions of how useful NetRegs would be based on the size of the business. Respondents from the agriculture sector (63%) and hotels and restaurants (59%) were the most likely to think it would be useful.

Use of NetRegs

Those who had heard of NetRegs were asked if they had ever used the website, and over half (57%) said that they had done so. This equates to 7% of the total sample of 506 respondents who had used the NetRegs website. Use was highest among the largest organisations, although there are some very small base sizes for this question which should be borne in mind when interpreting the findings (see Figure 15).

Figure 15: Whether respondents had used the NetRegs website

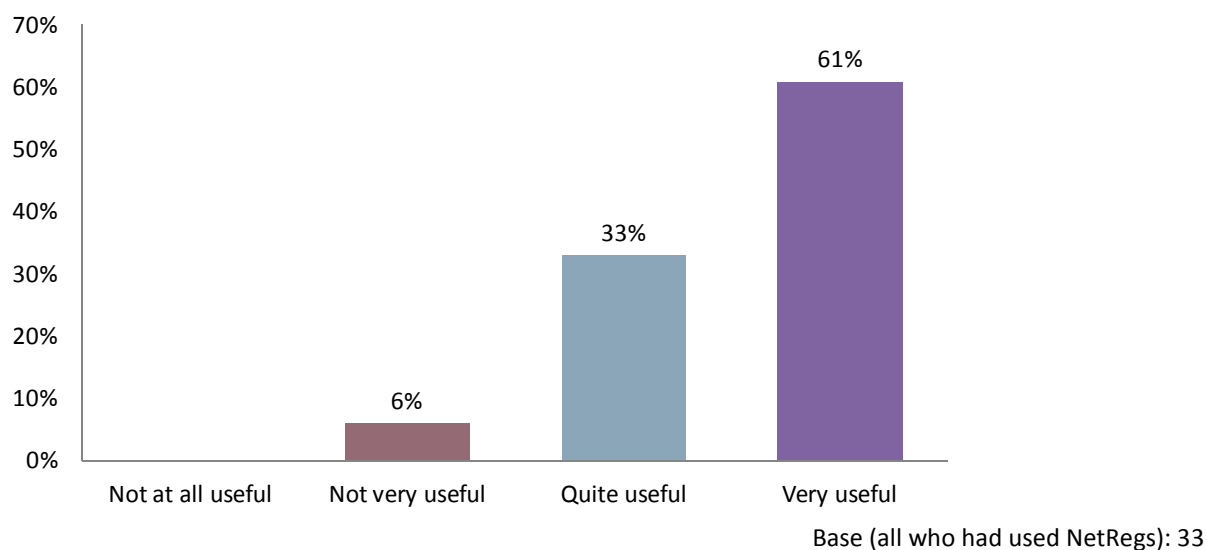


Base (all who had heard of NetRegs): 58

Ratings of NetRegs

These respondents were also asked how useful they found the NetRegs website and very positive feedback was received: 94% reported it was very or quite useful. Caution should be exercised in the interpretation of these findings due to the very small base size (see Figure 16).

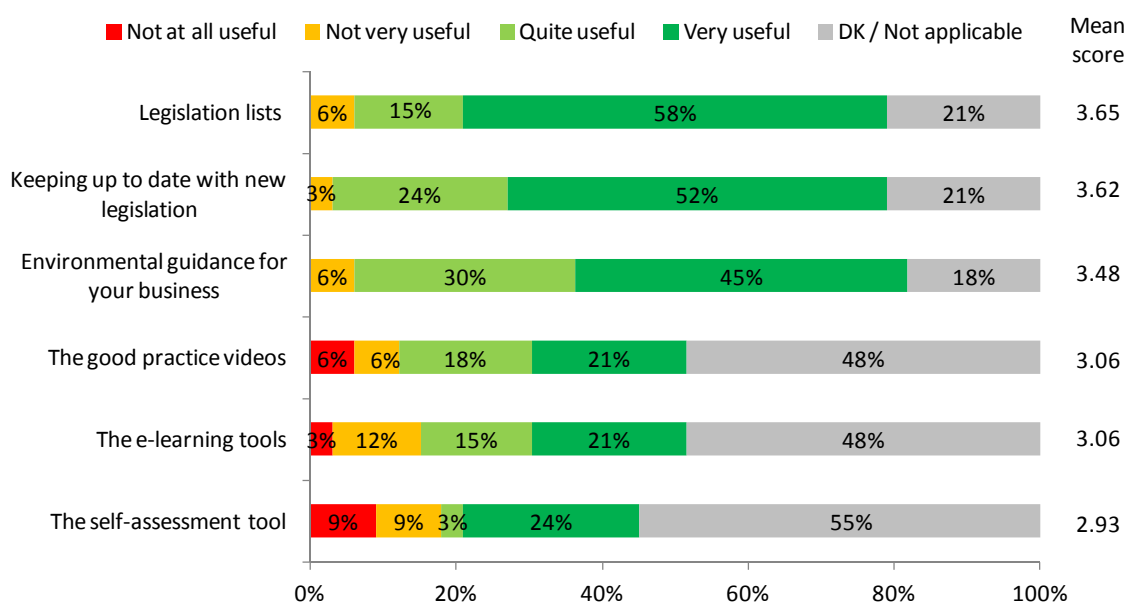
Figure 16: How useful respondents find the NetRegs website



Those who had used the NetRegs website were also asked to rate various aspects of the content of the website in terms of their usefulness. Please note that these findings should be treated as indicative only due to the very small base sizes involved (only 33 respondents had used the website).

As shown in Figure 17, the highest ratings were given for legislation lists, keeping up to date with new legislation and environmental guidance. The good practice videos, e-learning tools and self-assessment tool were given slightly lower ratings, although it should be noted that they were not used by as many respondents – the largest proportions answered ‘don’t know / not applicable’.

Figure 17: Usefulness of aspects of NetRegs



Base (all who had used NetRegs): 33

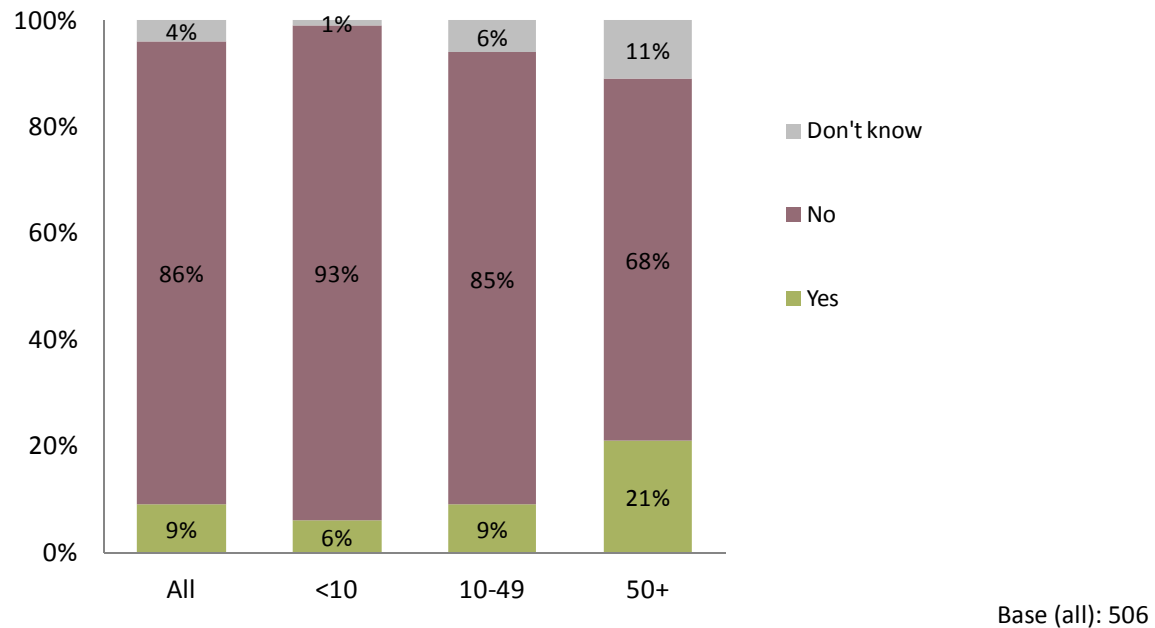
Please note that base sizes were too small to conduct meaningful sub-group analysis for the questions on ratings of NetRegs.

3.6 Current and future support from NIEA

Support received from NIEA

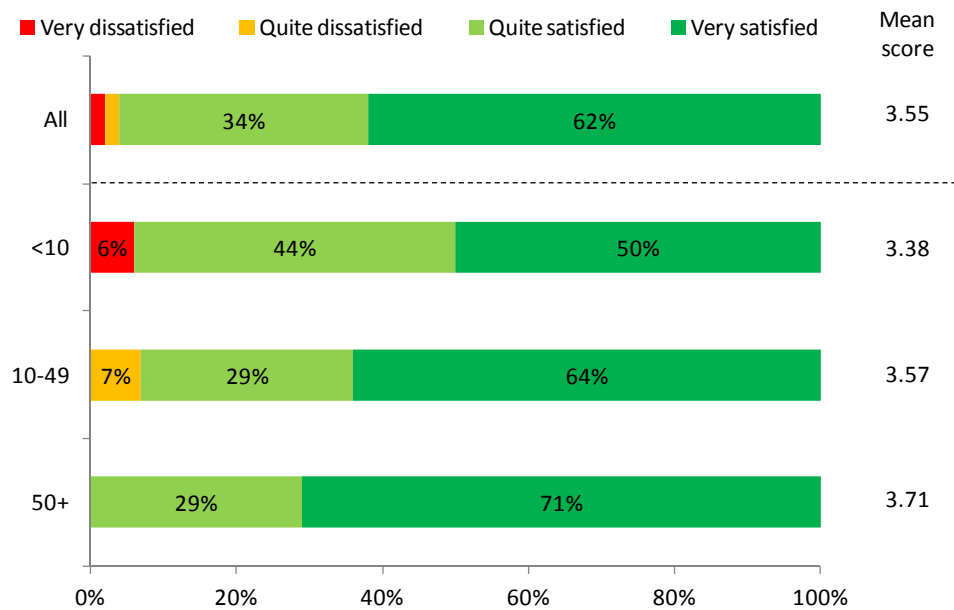
When respondents were asked whether they had ever received support from NIEA to help them deal with environmental issues, only 9% said that they had (see Figure 18). Those from the largest organisations were most likely to report receiving such support (21% of those with 50+ employees).

Figure 18: Whether respondents had received support from NIEA



Those who had received support were asked how satisfied they were with the support provided. As shown in Figure 19, high ratings were given – 96% reported that they were very or quite satisfied with NIEA’s support. Data is presented by business size although it should be noted that base sizes are very small (<10 = 16; 10-49 = 14; 50+ = 17).

Figure 19: Satisfaction with support provided by NIEA



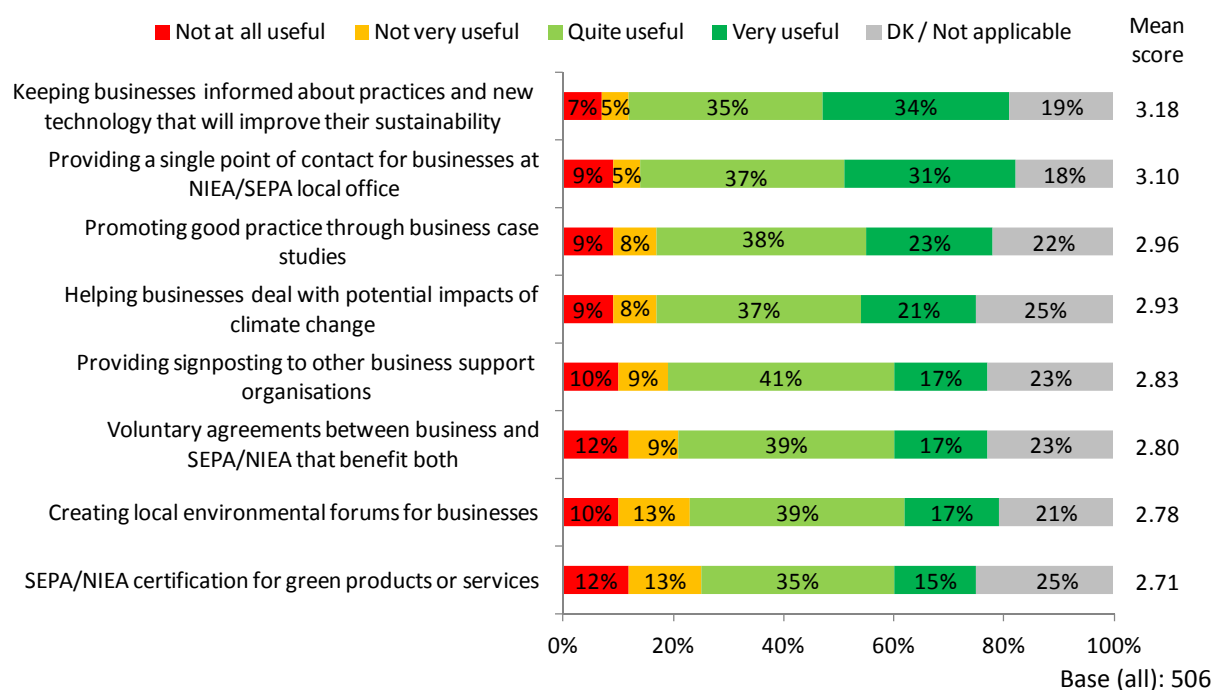
Base (all who had received support from NIEA): 47

Future support from NIEA

NIEA was interested in gauging levels of support for various proposed actions that are under consideration to help businesses generate opportunities from environmental improvements. The survey gave a list of possible actions and asked respondents how useful they would find these. As shown in Figure 20, there was broad support for all of the proposed actions, with only very small proportions saying they thought these would be not very or not at all useful.

The most popular suggestions were keeping businesses informed about practices and new technology that will improve their sustainability (with a mean score 3.18 out of 4) and providing a single point of contact at a NIEA local office (3.10). All other suggestions received only marginally less support; between 51% and 61% of respondents stated each would be very or quite useful.

Figure 20: How useful NIEA’s proposed actions would be



Significant differences emerged in responses to this question by business size, with the largest organisations being most positive about the proposed actions and the smallest organisations being least positive. As shown in Table 8, the proportions stating each improvement would be very or quite useful were higher among organisations of 10+ employees than among organisations of <10 employees.

Table 8: Proportion rating suggestions as very/quite useful by business size

Proposed actions to help generate business opportunities from environmental improvements	<10	10-49	50+
Keeping businesses informed about practices and new technology that will improve their sustainability	64%	72%	78%
Providing a single point of contact for businesses at SEPA / NIEA local office	60%	77%	76%
Promoting good practice through business case studies	54%	65%	77%
Helping businesses deal with potential impacts of climate change	54%	62%	63%
Providing signposting to other business support organisations	52%	63%	65%
SEPA / NIEA certification for green products or services	48%	54%	52%
Voluntary agreements between business and SEPA / NIEA that benefit both	51%	65%	60%
Creating local environmental forums for businesses	51%	59%	65%
Base	273	151	82

Respondents were asked whether there were any other actions that NIEA could take to help them generate business opportunities from environmental improvements, and overall 12% said yes. Of the 59 respondents making suggestions, the most common types of response related to:

- More regular contact / updates with changes / more contact in general (mentioned by 10 respondents)

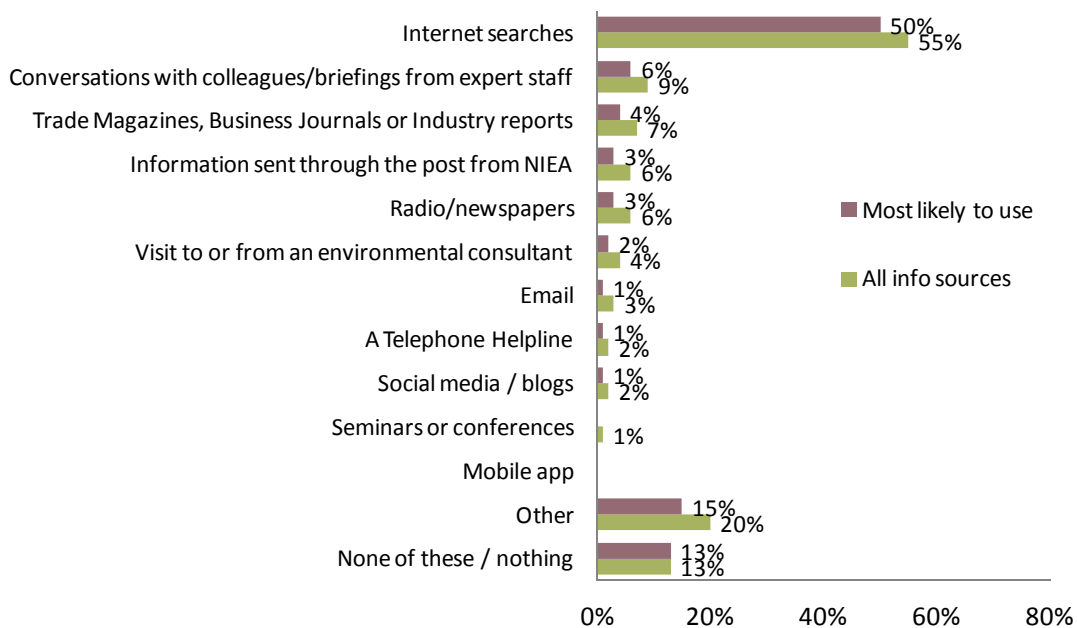
- Help to save money / source funds (9)
- Requests for information on specific topics (6)
- Be more positive in advice, not just punitive (3)
- Promote environmental issues/ make clients aware of responsibilities (3)
- Tougher enforcement (3).

3.7 Information sources

Finally, the survey focused on information sources that respondents were likely to use to find out about environmental issues relating to their business. Respondents were asked which sources they would ever use (and could select as many as they wanted) and then which **one** of these they would be most likely to use.

As shown in Figure 21, the most commonly mentioned information source was internet searches – in total 55% identified the internet as something they would use, and 50% said this would be the one source they would be most likely to use. Very few respondents mentioned other sources of information, and indeed just over one in ten respondents (13%) stated they would not use any information sources at all.

Figure 21: Information sources (all sources, and those most likely to use)



Base (all): 506

In total, 100 respondents reported that they would be likely to use 'other' information sources. The most commonly mentioned were the local council (mentioned by 37 respondents) and a government department (11 respondents).

There were very few sub-group differences in response to these questions, with the exception of:

- The smallest organisations were more likely than medium sized organisations to say they would get information from radio/newspapers (8% <10 v 2% 10-49)
- The largest organisations were least likely to say they would use none of these information sources (4% of 50+ v 16% of <10 and 13% 10-49).

4. Summary and Conclusions

Progressive was commissioned to conduct the 2016 NetRegs awareness research among SMEs in Scotland and Northern Ireland, to provide an up to date picture of current attitudes and awareness in relation to NetRegs and environmental issues. A total of 506 interviews were conducted with Northern Irish businesses, covering a good spread of SMEs in relation to industry sector and business size. The sample was designed to focus on the core industry sectors of agriculture, construction, healthcare, hotels and restaurants, and transport, in line with previous surveys; however, other sectors, such as education, financial services and food and drink manufacturers, were also included to ensure the sample was broadly representative of all SME businesses in Northern Ireland.

4.1 Measures to address environmental issues

The vast majority of SME businesses in Northern Ireland have taken at least some action to reduce harm to the environment. When asked what, if any, practical measures their organisation had ever introduced aimed at preventing or reducing harm to the environment, the majority of respondents (74%) spontaneously mentioned at least one measure, and this figure rose to 92% when respondents were prompted with a list of possible measures. The most common measures implemented related to dealing with waste; either recycling waste (mentioned by 83%) or cutting down on waste (mentioned by 60%).

Respondents from the smallest organisations (those with less than 10 employees) were significantly less likely than those from medium or larger organisations to mention almost all of the measures.

Very few respondents reported that they had **never** introduced any measures to reduce harm to the environment. However, among those who had not the most common reason given was that they did not have time to think about it or it is not a business priority (mentioned by a third of these respondents).

4.2 Implementation of an Environmental Management System (EMS) or Environmental Policy

Across the sample as a whole, 13% said their company had an Environmental Management System such as an ISO 14001, BS 8555 or Green Dragon standard, although the proportion was much higher among the largest companies (26%). Respondents working in the construction industry were more likely to report having an EMS (25%) than those working within any of the other sectors.

When asked about environmental policies as well as an EMS, 40% of the sample overall had either an EMS or an environmental policy in place. Again, the largest organisations were most likely to have an EMS or environmental policy, as were those in the agriculture, construction and healthcare sectors.

The most common reasons given for taking steps to improve environmental performance were improving the business's reputation / green credentials (mentioned by 45%), financial pressures (26%) and suggestions from within the business (18%).

The most frequently reported benefits of taking these steps included reduced operating costs (56%) and reduced risk of prosecution or fines (48%) – these benefits could be highlighted in communications encouraging businesses to make improvements to improve their environmental performance.

The survey also asked those **who did not** have an EMS or environmental policy how useful they felt such a policy would be. The majority did not feel this would be useful (64% overall said it would be of no use or of little use). Only 26% felt it would be quite or very useful, although 10% said they did not know. The smallest organisations were significantly more likely than others to report an EMS or environmental policy would be of little or no use (72% of those with fewer than 10 employees said this, compared to 49% of 10-49 and 48% of 50+). Promoting the purpose and benefits of having an EMS or policy might help improve uptake, especially since a sizeable minority said they did not know whether it would be useful to their business or not.

As a further measure of the commitment of businesses to environmental harm reduction, respondents were also asked how likely they were to invest money in improving their environmental performance over the next 12 months. In total, 31% reported that they were very or quite likely to invest. Reflecting the general pattern of response, the smallest organisations were least likely to predict investment in their environmental performance (26% v 50% 50+). Therefore, targeting communications to smaller organisations to make it clear that environmental policies and/or investment is relevant to them might help improve rates of future investment.

4.3 Awareness of the environment and legislation

When respondents were asked to state (without any prompting) what activities, if any, their organisation undertakes which could be regarded as harmful to the environment, 29% spontaneously mentioned at least one. However, when prompted with a list of potentially harmful activities, the proportion reporting that their company undertook at least one rose to 72%. Clearly some of the harmful activities are not 'top of mind' among respondents, suggesting a need to raise awareness of these issues.

Taking the spontaneous and prompted responses together, the most commonly mentioned harmful activities were transport (mentioned by 45%), storing waste on site prior to removal (33%), storing chemicals, fuels or oils (31%) and producing or using packaging (27%).

It was also important to understand how aware SME businesses are of relevant environmental legislation. When prompted with a list of regulations and legislation the majority recognised at least one, with awareness highest for Hazardous Waste Regulations (70%), Duty of Care Regulations (60%) and Food Waste Regulations (57%).

There was a very clear pattern in responses across business size for this question, with the largest organisations being the most aware of each of the regulations / legislation. These findings provide further evidence of a need to raise awareness of environmental issues among the smallest businesses.

4.4 Sources of information, advice and support

Overall, 18% of the sample had ever been in contact with any business support organisations to discuss environmental issues – although this figure was higher among the largest organisations (34%, v 13% of the smallest organisations). The most commonly mentioned organisation was the local council (24%), although a large number of specific organisations were also listed.

4.5 Awareness and use of NetRegs

Only a minority of respondents (11%) reported that they were aware of NetRegs. Reflecting previous findings, awareness was higher among the larger organisations (22%, v 7% among the smallest

companies). The proportions who had heard of NetRegs were broadly consistent among the core industry sectors, with the exception of those in the healthcare sector who were less likely than any others to have heard of the website (2%). The research, therefore, suggests that there is some considerable scope to raise awareness of the NetRegs website and the benefits it can offer businesses.

Indeed, when those who had not heard of NetRegs were given a description of the service and then asked how useful they would find it, the majority (53%) thought the site would be quite or very useful. The highest levels of anticipated value were found in the construction (63%) and hotels and restaurants (59%) sectors. These findings suggest that lack of awareness is more of a barrier to uptake of the website than negative perceptions of the value of the site. Therefore, more widespread promotion of the NetRegs website is likely to lead to greater uptake.

Over half (57%) of those who had heard of NetRegs said that they had used it. Ratings of NetRegs were very positive, both in terms of its usefulness and also in terms of the individual elements of the website. The highest ratings were given for legislation lists, keeping up to date with new legislation and environmental guidance. The good practice videos, e-learning tools and self-assessment tool were given slightly lower ratings, although it should be noted that they were not used by as many respondents – the largest proportions answered ‘don’t know / not applicable’. All of the findings relating to ratings of NetRegs should be treated with caution as they are based on very small base sizes.

4.6 Current and future support from NIEA

When respondents were asked whether they had ever received support from NIEA to help them deal with environmental issues, only 9% said that they had, although this figure was higher among the largest organisations (21%). Ratings of the support received were generally high, with 96% reporting that they were very or quite satisfied. The survey did not explore awareness of NIEA or what the organisation does, although the fact that less than one in five respondents had sought help from NIEA suggests that promotion of the advice available may help raise awareness of NIEA’s services.

NIEA wanted to gauge levels of support for various proposed actions that could help businesses generate opportunities from environmental improvements. Respondents showed broad support for all of the proposed actions, with very small proportions saying they thought these would be not very or not at all useful.

The most popular suggestions were keeping businesses informed about practices and new technology that will improve their sustainability, providing a single point of contact at a NIEA local office and promoting good practice through business case studies. Reflecting a consistent pattern of response throughout the data, the largest organisations were the most positive about the proposed actions.

4.7 Information sources

Finally, the survey focused on information sources that respondents were likely to use to find out about environmental issues relating to their business. The most commonly mentioned information source was internet searches – in total 55% identified the internet as something they would use, and 50% said this would be the one source they would be most likely to use. Very few respondents mentioned other sources of information, and indeed just over one in ten (13%) stated they would not use any information sources at all. Any action that NIEA can take to ensure a good web presence when searching for relevant terms will help organisations find them as a source of advice.

4.8 Conclusions

SME business in Northern Ireland are clearly motivated to ensure that they operate in a way that minimises any harmful impact on the environment. Almost all respondents reported that their business had implemented measures to reduce environmental harm, although motivations to do so were varied. They also understand the business benefits of implementing environmental protection measures, such as reducing operating costs, reducing the risk of prosecution and improved relations with customers. However, there were significant variances in findings by size of company, with larger organisations (with more than 50 employees) the most aware of potentially harmful activities and the relevant legislation, and the most likely to have taken steps to reduce their environmental impact. The smallest companies (those with less than 10 employees) tended to have lower levels of awareness, and were also less likely to perceive value in implementing or investing in measures to reduce environmental impact.

The research, therefore, suggests that the smaller SMEs in Northern Ireland require information and advice on how their operations could potentially harm the environment, and how they could minimise these harms. There is also a need, however, to persuade these organisations of the business benefits and opportunities that investment in such harm reduction measures could bring.

One method which could be used to raise awareness amongst all SME businesses is the NetRegs website, particularly since the internet is the key source of information on environmental issues. However, the NetRegs site itself is not being widely utilised by SME companies, despite the fact that it is very well regarded amongst those who have used it. Awareness seems to be the main barrier preventing uptake, rather than a lack of relevance or perceived usefulness; the majority of those who had not used the site thought that it would be something that could be useful to their business.

The findings, therefore, provide clear evidence of the potential value of NetRegs, as well as the need for it, especially amongst smaller SMEs. Focused promotion of the site, and regarding the value of engagement in environmental harm reduction measures, on smaller SMEs will drive visits to the site and potentially lead to improved environmental performance within this sector.

Appendix 1: Survey Questionnaire

Introduction

Good morning/afternoon/evening, I am _____ from Progressive, an independent market research company who are carrying out a government survey funded by the [route from sample] Scottish Environment Protection Agency (SEPA) / Northern Ireland Environment Agency (NIEA).

This is an important study to find out what environmental issues are faced by UK businesses, and also how aware people are of the sources of help available.

This is a confidential survey which takes no more than 10 minutes to complete. Everyone who takes part will be entered into a prize draw to win £200. Would it be OK to ask you a few brief questions to ascertain your views on the subject?

SQ1. We're interested in speaking to the person in the business who deals with environmental issues and decisions, such as waste management or water and energy use in the business. Are you responsible for this kind of decision making in your business?

	CODE
Yes	1
No	2

IF YES, CONTINUE. IF NO, ASK TO SPEAK TO THE PERSON RESPONSIBLE AND/OR ARRANGE CALL-BACK.

SQ2. Calls may be recorded for quality control purposes. Are you happy with that?

	CODE
Yes	1
No	2

IF NO (SQ2=2), ARRANGE CALL-BACK

Q1a) What, if any, practical measures has your organisation ever introduced aimed at preventing or reducing harm to the environment? [Do not read out, multicode]

Q1b) Has your organisation ever undertaken any of the following activities? [mask any already mentioned at Q1a] [Read out, multicode]

	Q1a (spont)	Q1b (prompt)
Assessed the impact your business has on the environment	1	1
Carried out a programme of environmental improvements	2	2
Made someone in the company responsible for environmental matters	3	3
Made any energy efficiency or water reduction improvements	4	4
Cut down your business waste	5	5
Recycled your business waste	6	6
Reduced transport emissions	7	7

Reduced transport costs	8	8
Reduced your use of raw materials	9	9
Other environmental activity (specify)	10	10
None of these / nothing	11	11

ASK IF NEVER TAKEN ANY ACTIVITIES (Q1a=11 and Q1b=11)

Q1c. What would you say has prevented you from undertaking any of these measures to reduce harm to the environment? [Do not read out, multicode]

	CODE
It is too expensive / cost issues	1
Don't have time to think about it / it is not a priority for the business	2
Don't know what actions to take	3
Have never thought about it	4
Other (specify)	5
Don't know	6

ASK ALL

Q2. Has your business set up an Environmental Management System such as an ISO 14001 [pronounced 'fourteen thousand and one'], BS 8555 [pronounced '8 triple 5'], or [route from sample] Green ticks [Scotland] / Green Dragon [Northern Ireland] standard?

	CODE
Yes	1
No	2
Don't know	3

ASK IF NO OR DK (Q2=2,3)

Q3. Does your business have an Environmental Policy in place?

	CODE
Yes	1
No	2
Don't know	3

ASK IF NO OR DK (Q3=2,3)

Q4. How useful do you feel an Environmental Management System or Environmental Policy would be to your business?

	CODE

Of no use	1
Of little use	2
Quite useful	3
Very useful	4
Don't know	5

ASK ALL

Q5. How likely are you to invest money in improving your environmental performance over the next 12 months?

	CODE
Very unlikely	1
Quite unlikely	2
Quite likely	3
Very likely	4
Don't know	5

ASK IF YES TO ANY OPTIONS @ Q1a/b, OR YES @ Q2 OR Q3

Q6. What prompted you to take steps to improve your environmental performance? [Do not read out, multicode]. Probe, anything else?

	CODE
Business support organisations (specify name of organisation)	1
Suggestions from within the business	2
Stakeholder / supply chain requests or pressures	3
Customer or client requests or pressures	4
TV news or programmes	5
Financial pressures	6
To keep ahead of the competition	7
To improve reputation / green credentials	8
Other (specify)	9
Don't know	10

Q7. As a result of taking steps to improve your environmental performance, has your business benefited from any of the following? [Read out, multicode] Probe – Anything else? Code under 'other'.

	CODE
Reduced operating costs	1

Increased sales and profitability	2
Improved relationships with customers/others	3
Reduced risk of prosecution or fines	4
A more motivated workforce	5
Other (specify)	6
None of these	7
Don't know	8

ASK ALL

Q8. Have you ever been in contact with any business support organisations to discuss environmental issues?

	CODE
Yes	1
No	2
Don't know	3

ASK IF YES (Q8=1)

Q8a. Which organisation(s) have you spoken to about environmental issues? [Do not read out, multicode]

Route from sample		CODE
ASK ALL	A trade association (specify)	1
ASK ALL	Federation of Small Businesses	2
ASK ALL	Business in the community	3
ASK ALL	NetRegs	4
ASK ALL	Local Council	5
ASK ALL	Waste companies	6
NI	WRAP Northern Ireland	7
NI	Invest NI	8
NI	NIEA	9
NI	ARENA network	10
NI	Energy saving trust / carbon trust	11
Scot	Resource Efficient Scotland / Zero Waste Scotland	12
Scot	Scottish Enterprise / HIE	13
Scot	SEPA	14

Scot	Energy saving trust / carbon trust Scotland	15
ASK ALL	Any other business organisation (specify)	16

Q9a) What activities, if any, does your organisation undertake which you think could be regarded as harmful to the environment? [Do not read out, multicode]

Q9b) Does your organisation undertake any of the following activities? [mask any already mentioned at Q9a] [Read out, multicode]

	Q9a (spont)	Q9b (prompt)
Store waste on site prior to removal	1	1
Use transport (for travel or deliveries)	2	2
Store chemicals, fuel or oils	3	3
Produce or use packaging	4	4
Use water pumped from lochs, rivers or boreholes	5	5
Emit smoke or fumes to air	6	6
Other (specify)	7	7
None of these / nothing	8	8

Q10. Have you heard of any of the following environmental regulations or legislation? [Read out, multicode]

Route from sample		CODE
ASK ALL	Food waste regulations	1
ASK ALL	Packaging Waste Regulations	2
ASK ALL	Duty of Care Regulations	3
ASK ALL	Waste Electrical and Electronic Equipment Regulations (WEEE Regulations)	4
NI	Hazardous Waste Regulations	5
Scot	Zero Waste Regulations (segregation of recyclable waste)	6
Scot	Special Waste Regulations	7
ASK ALL	Any other environmental legislation that applies to your business (specify)	8
ASK ALL	None of these [do not read out]	9

Q11. Does your business need any Permit, Licence or Exemption from [route from sample] SEPA / NIEA to carry out its activities?

	CODE
Yes	1

No	2
Don't know	3

Q12. Have you heard of the NetRegs website?

	CODE
Yes	1
No	2
Don't know	3

ASK IF HEARD OF NETREGS (Q12=1)

Q13. Have you used the NetRegs website?

	CODE
Yes	1
No	2
Don't know	3

IF HAVE NOT HEARD / NOT USED / DK (Q12=2,3 OR Q13=2,3)

Q14. The NetRegs site provides free, plain English guidance to help small and medium sized businesses comply with their environmental responsibilities. How useful would your organisation find this service?

	CODE
Of no use	1
Of little use	2
Quite useful	3
Very useful	4
Don't know	5

IF HAVE USED NETREGS (Q13=1)

Q15. How useful do you find the NetRegs website?

	CODE
Not at all useful	1
Not very useful	2
Quite useful	3
Very useful	4

Q16. And how useful do you find the following features of the site?

	Not at all useful	Not very useful	Quite useful	Very useful	DK / Not applicable
Environmental guidance for your business	1	2	3	4	5
Legislation lists	1	2	3	4	5
Keeping up to date with new legislation	1	2	3	4	5
The e-learning tools	1	2	3	4	5
The self-assessment tool	1	2	3	4	5
The good practice videos	1	2	3	4	5

ASK ALL

Q17. Have you ever received support from [route from sample] NIEA / SEPA to help you deal with environmental issues?

	CODE
Yes	1
No	2
Don't know	3

ASK IF RECEIVED SUPPORT (Q17=1)

Q18. How satisfied are you with the support you received from [route from sample] NIEA / SEPA?

	CODE
Very dissatisfied	1
Quite dissatisfied	2
Quite satisfied	3
Very satisfied	4

ASK ALL

Q19. [Route from sample] NIEA / SEPA are considering a list of possible actions that could help businesses generate business opportunities from environmental improvements. How useful would you find each of the following actions?

	Not at all useful	Not very useful	Quite useful	Very useful	DK / Not applicable
Voluntary agreements between business and SEPA/NIEA that benefit both	1	2	3	4	5

Providing a single point of contact for businesses at NIEA/SEPA local office	1	2	3	4	5
SEPA/NIEA certification for green products or services	1	2	3	4	5
Promoting good practice through business case studies	1	2	3	4	5
Helping businesses deal with potential impacts of climate change	1	2	3	4	5
Providing signposting to other business support organisations	1	2	3	4	5
Creating local environmental forums for businesses	1	2	3	4	5
Keeping businesses informed about practices and new technology that will improve their sustainability	1	2	3	4	5

Q20. Are there any other actions [route from sample] SEPA/NIEA could take to help you generate business opportunities from environmental improvements?

	CODE
Yes	1
No	2
Don't know	3

ASK IF YES (Q20=1)

Q21. What other actions [route from sample] could SEPA/NIEA take to help you generate business opportunities from environmental improvements?

Q22a) Which sources of information, if any, are you likely to use to find out about environmental issues that relate to your business? [Do not read out, multicode]. Probe – anything else?

Q22b) [Routed from options selected at Q24a] And which one of these are you **most** likely to use to find out about environmental issues that relate to your business?

	Q22a – all	Q22b – most
Internet searches	1	1
Social media / blogs	2	2
Email	3	3
Mobile app	4	4
Trade Magazines, Business Journals or Industry reports	5	5

Radio/newspapers	6	6
A Telephone Helpline	7	7
Visit to or from an environmental consultant	8	8
Seminars or conferences	9	9
Information sent through the post from SEPA/NIEA	10	10
Conversations with colleagues, or briefings from expert staff	11	11
Other (specify)	12	12
None of these	13	13

Q23. The final few questions are just for classification purposes to help with our analysis. Roughly how many permanent employees does your business have (including both full and part time staff)? _____

Q24. What is your position in the company?

	Code
Owner/MD/Partner	1
Director/company secretary	2
Works/production/site/farm manager	3
Environmental manager/officer	4
Technical manager/officer (e.g. Health and safety, quality, contracts)	5
Office Manager/Personnel manager/Admin/Secretary/PA etc	6
Other (specify)	7

Q25. The NetRegs website provides a free monthly email update on environmental guidance. Would you be interested in signing up?

	CODE
Yes	1
No	2

IFYES (Q25=1)

Q26. May I confirm your contact name and email address? This information will not be shared with any third parties and will be stored in accordance with the Data Protection Act.

Contact name _____

Email address _____

THANK AND CLOSE

Appendix 2: Technical Appendix

Quantitative

Methodology:

- The data was collected by CATI interviewing
- The target group for this research study was SMEs in Northern Ireland
- The sampling frame used for this study was a sample database provided by Prospect360
- The target sample size was 500 and the final achieved sample size was 506. The reason for the difference between these two samples was standard sampling procedures allowing for slight overage.
- Fieldwork was undertaken between 25th January and 25th February 2016.
- Respondents were selected using:
 - a stratified random sampling technique, whereby interviewers worked to specified quota controls on key sample criteria, and selected respondents randomly within these quotas
- An incentive of a £200 prize draw was used to encourage a positive response to the survey.
- In total, 27 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252.
 - Validation was achieved by recording all interviews and listening to a minimum of 10% of the interviews for each interviewer working on the study. In addition, interviewers were constantly monitored by the Telephone Unit Manager to ensure quality was maintained throughout each interview.
- None of the work for this project was sub-contracted.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Data Processing and Analysis:

- Quota controls were used to guide sample selection for this study. This means that we cannot provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample.
 - The overall sample size of 500 provides a dataset with an approximate margin of error of between $\pm 0.87\%$ and $\pm 4.36\%$, calculated at the 95% confidence level (market research industry standard).
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
 - For **CATI Questionnaires** these checks include:
 - All responses logged by the interviewers are checked for completeness and sense. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact respondents to check and, if necessary, correct the data.
 - Data is entered into our analysis package, SNAP, and data is stored on CATI booths until imported and stored in our secure workfiles.
 - A computer edit of the data is carried out prior to analysis, involving both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
 - Where 'other' type questions are used, the responses to these are checked against the parent question for possible up-coding.
 - Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
 - Our analysis package is used and a programme set up with the aim of providing the client with useable and comprehensive data. Cross breaks to be imposed on the data are discussed with the client in order to ensure that all information needs are being met.