

# CBI Membership Research 2012/13

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- **This report presents the findings from a programme of research carried out among CBI members in late 2012. It focused on defining the value of CBI membership and exploring perception of how the organisation communicates with its members.**
- **An additional aspect of the research assessed the state of the business nation, capturing their priorities for 2013 and asking what they believe the CBI should be focusing on.**
- **The elements of the research were:**
  - An online survey with responses from 625 CBI members;
  - 30 in-depth interviews with a range of members;
  - Two workshop discussions including 40 participants from a North West regional council meeting held in Liverpool and the Chairman's Committee in London.
- **Throughout this report we have referred to CBI members by size (number of employees<sup>1</sup>), industry sector and region. In addition we have used overall ratings of satisfaction as a baseline measure for comparisons against other aspects.**



## Management summary



# The state of the business nation

- **Increased business and consumer confidence are critical for the success of CBI members in 2013. Their key words for 2013 are: growth, sustainability, and profitability – with maintaining their position or holding steady being key.**
- **Large organisations tended to focus on business demand, recruitment, ‘predictable government policy’, improved infrastructure and pensions. SMEs on ‘availability of finance.’**
- **A third reported steady growth in 2013 and just 7% decline, with over half (53%) describing themselves as ‘holding steady.’**
- **But a quarter are not very confident about the next 12 months - a third of those in the manufacturing and production sectors.**
- **In their view the CBI should focus on the ‘state of the economy’ in 2013, but also ‘making the UK an attract place to invest’ and ‘international competitiveness.’**

# The value of CBI membership

- **Two-thirds are satisfied with CBI membership but a third are neither satisfied or dissatisfied (the 'passives') with very few dissatisfied.**
- **The 'passives' are similar to others in terms of region, size and sector, but vary in their attitudes. They are twice as likely to have never attended national events and even less likely to have attended regional ones. A third of them have never accessed survey / forecast or business trend data.**
- **The value of political / economic intelligence and perceptions of the 'wider importance of the CBI to the business community' are especially strongly correlated to satisfaction with membership. Of the services, using data and reports is more closely related to satisfaction than the value of lobbying or attending events.**
- **Members believe the CBI has credibility, it provides the 'voice of business', but some are unsure how they can influence its decisions and whether it always listens to them.**
- **Those who attend events and are in the regional structure feel engaged, those outside tend to be less satisfied.**

# Communicating effectively

- **Perceptions are that the CBI is good at communicating at a high-level but this does not always translate into keeping members informed and engaged.**
- **A third feel that regional events could be improved – 42% of the ‘passives’ with comments focused on content, promotion, location and cost.**
- **A fifth attend 5 or more CBI events on average, but a similar proportion none. The ‘passives’ and SMEs have been reducing their attendance in the last 12 months.**
- **Policy updates are widely read, particularly by manufacturing / production businesses, but one or two e-mails per week is the maximum number tolerated.**
- **A third of members are using a tablet or smartphone as their main method of accessing CBI or other business e-mails, whilst there is a demand for engagement through LinkedIn and Twitter to a lesser extent.**
- **Communications should be targeted with strong summaries, half would welcome more sector specific events and short briefings. Others talked about opportunities to interact through forums and blogs.**

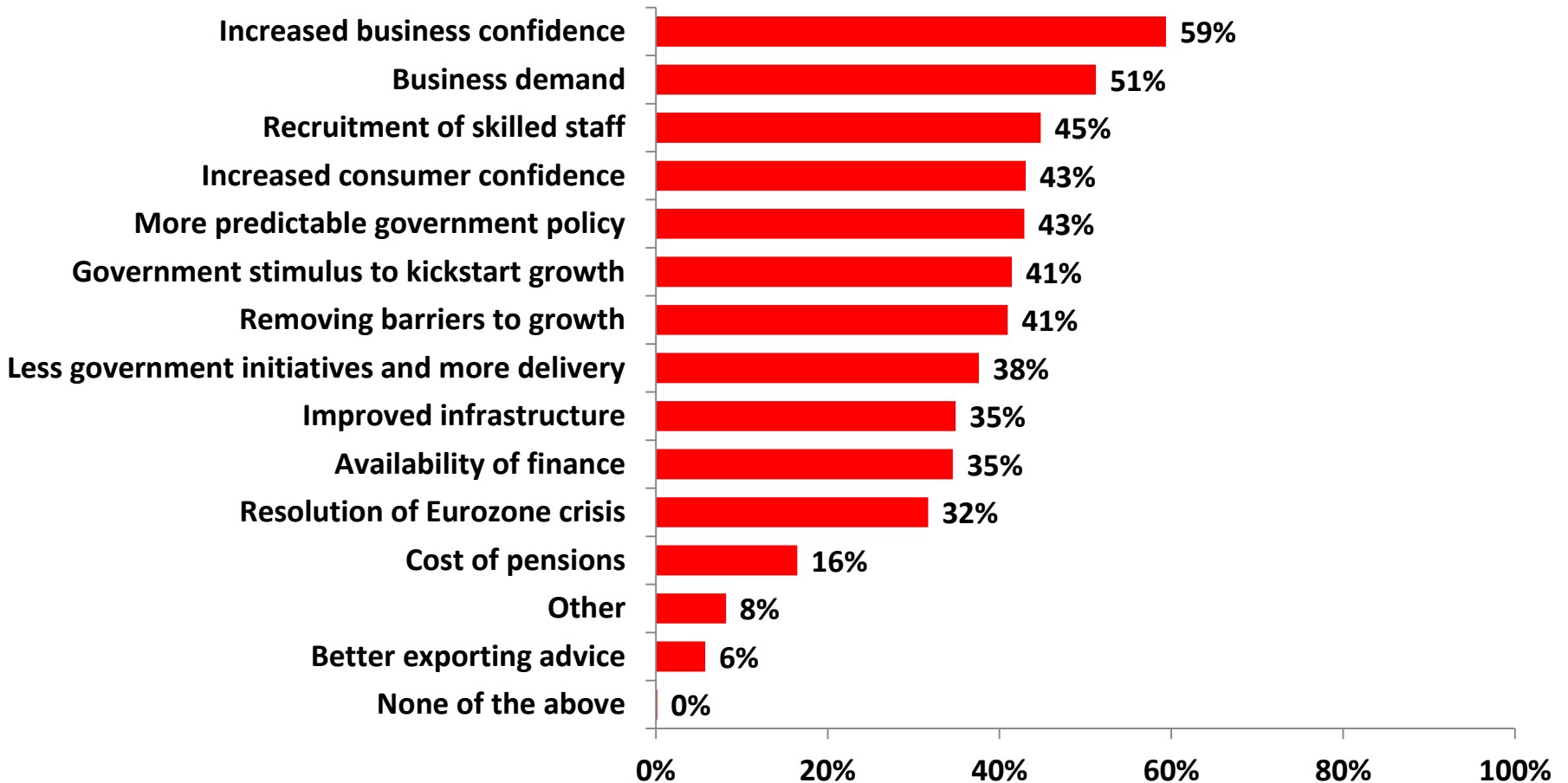


## **Section A: The economy and state of business**



# Increased business confidence is the key success factor for the majority of CBI members

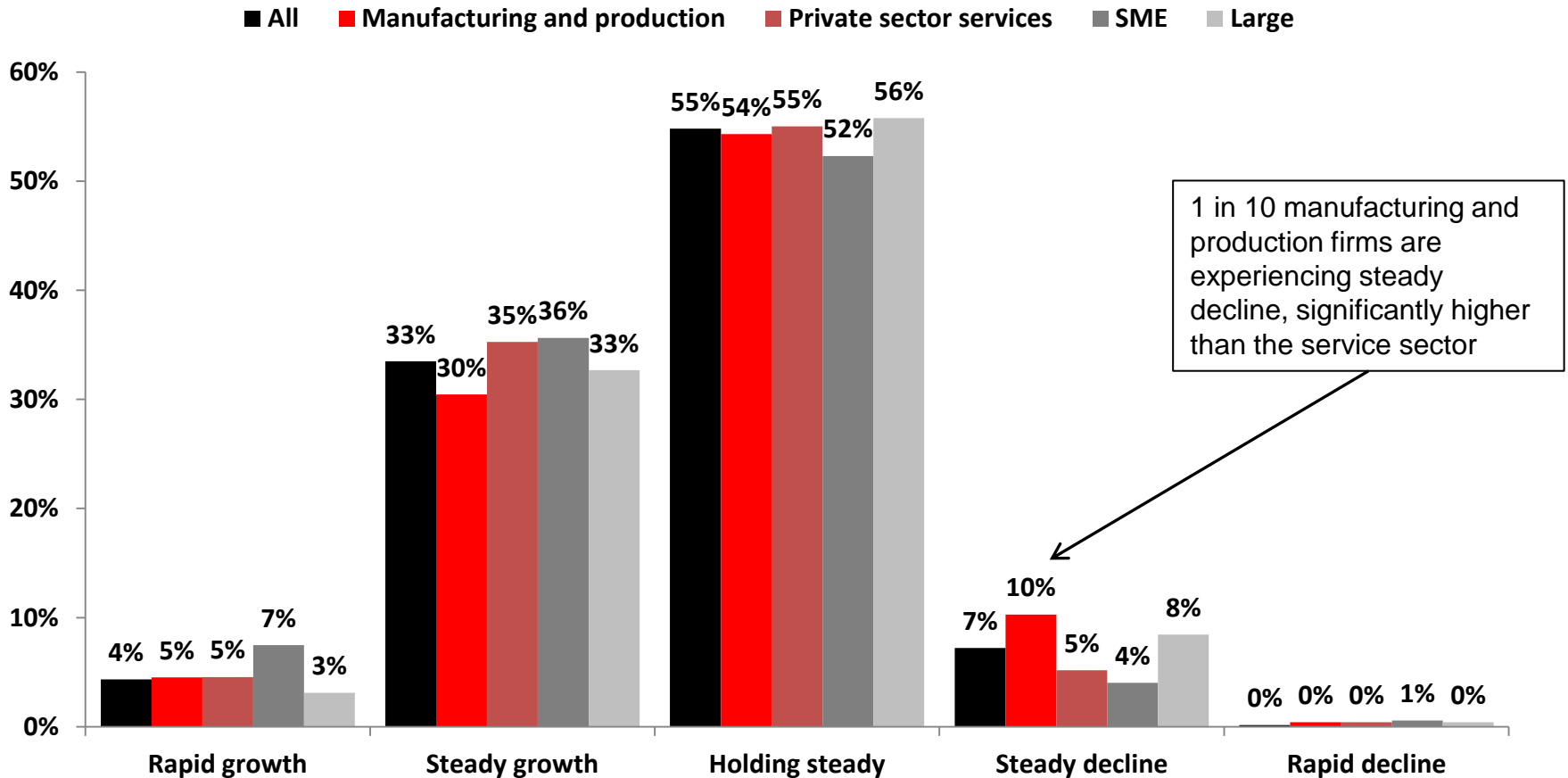
Which of the following, if any, are key success factors for achieving your company's business objectives?





# It has been a challenging year but over half of organisations are holding steady and a third reported steady growth

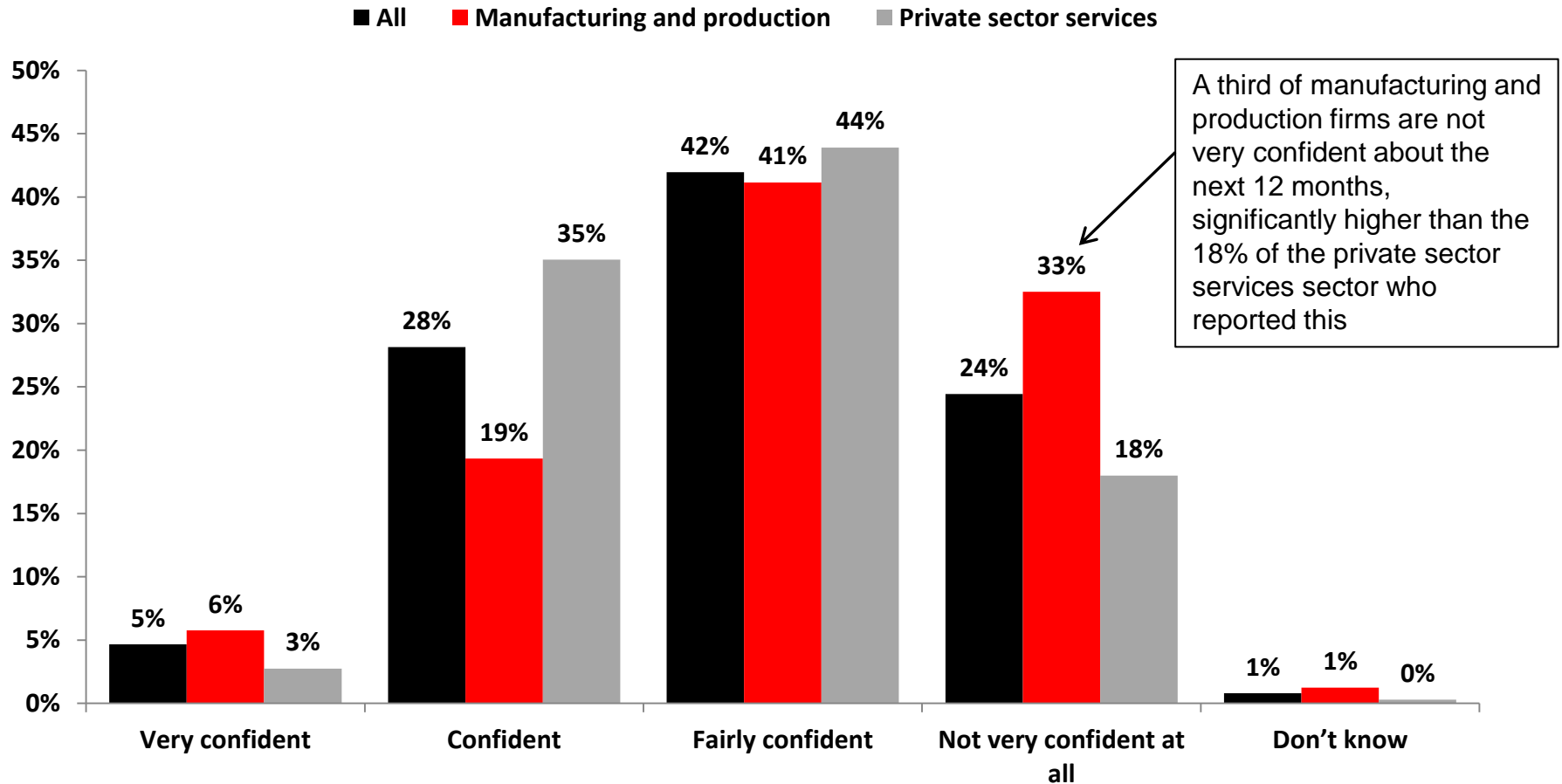
Which of the following best describes the growth of your business over the last 12 months?



Base = All (n=625), Manufacturing and production (n=244), private sector services (n=329), SME's (n=174), Large (n=451)

# Future confidence is stronger with seven out of 10 CBI members confident or fairly confident about their growth prospects

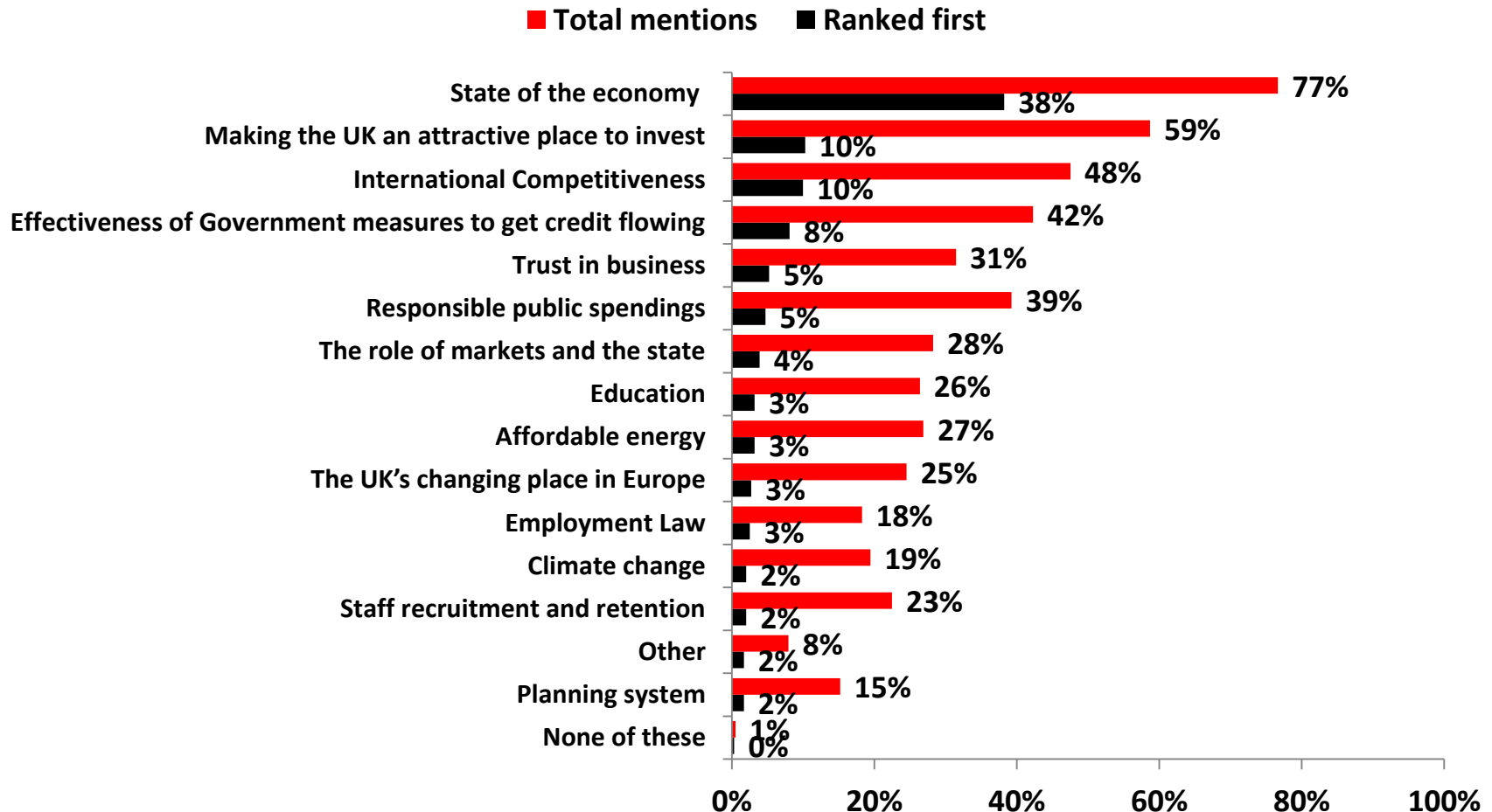
How confident do you feel about the growth prospects of your organisation in the next 12 months?



Base = All (n=625), Manufacturing and production (n=244), private sector services (n=329), SME's (n=174), Large (n=451)

# The state of the economy is overwhelmingly the issue that CBI members would like the CBI to focus on in 2013.

Based on your own priorities, which of the following issues would you like CBI to focus on in 2013?

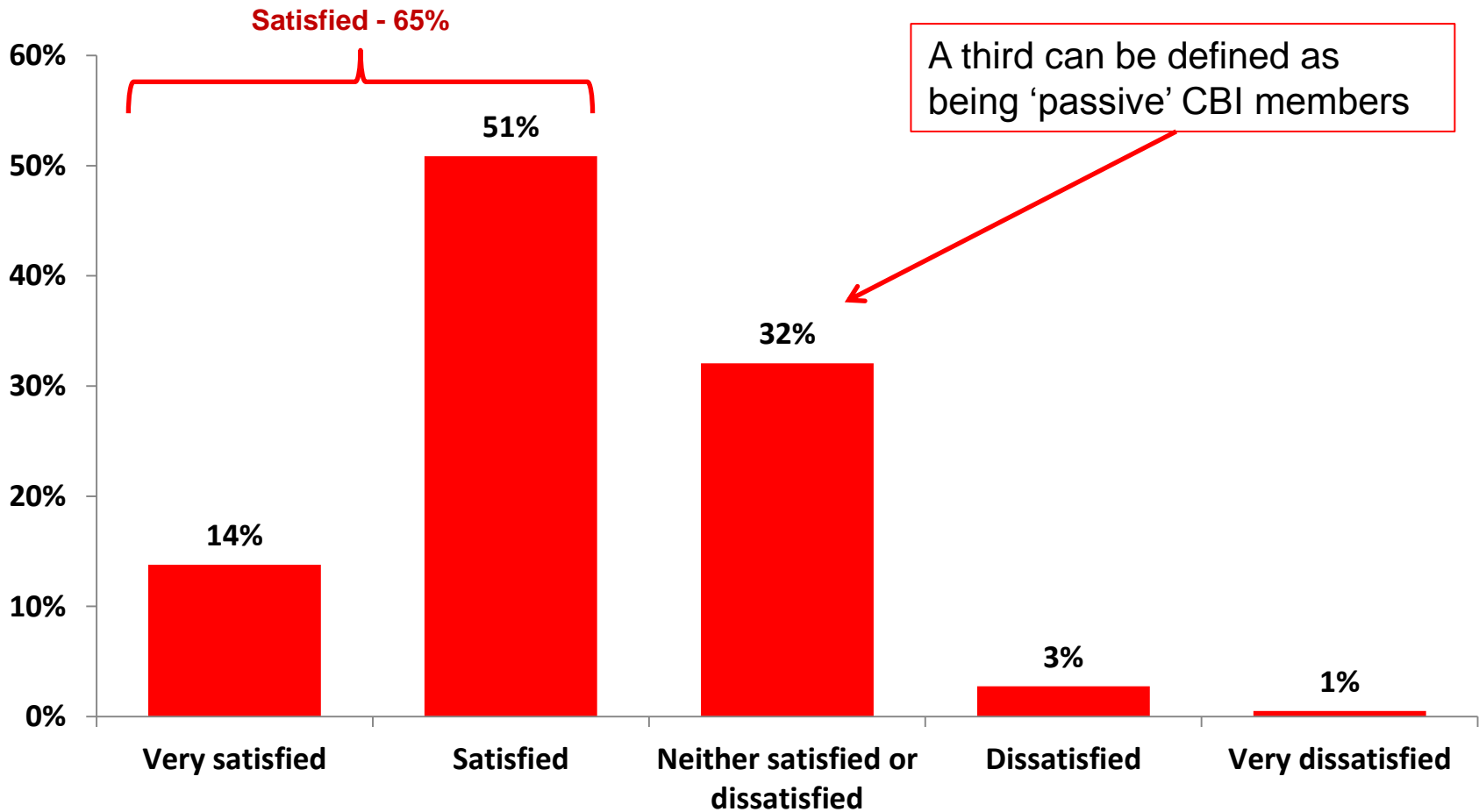




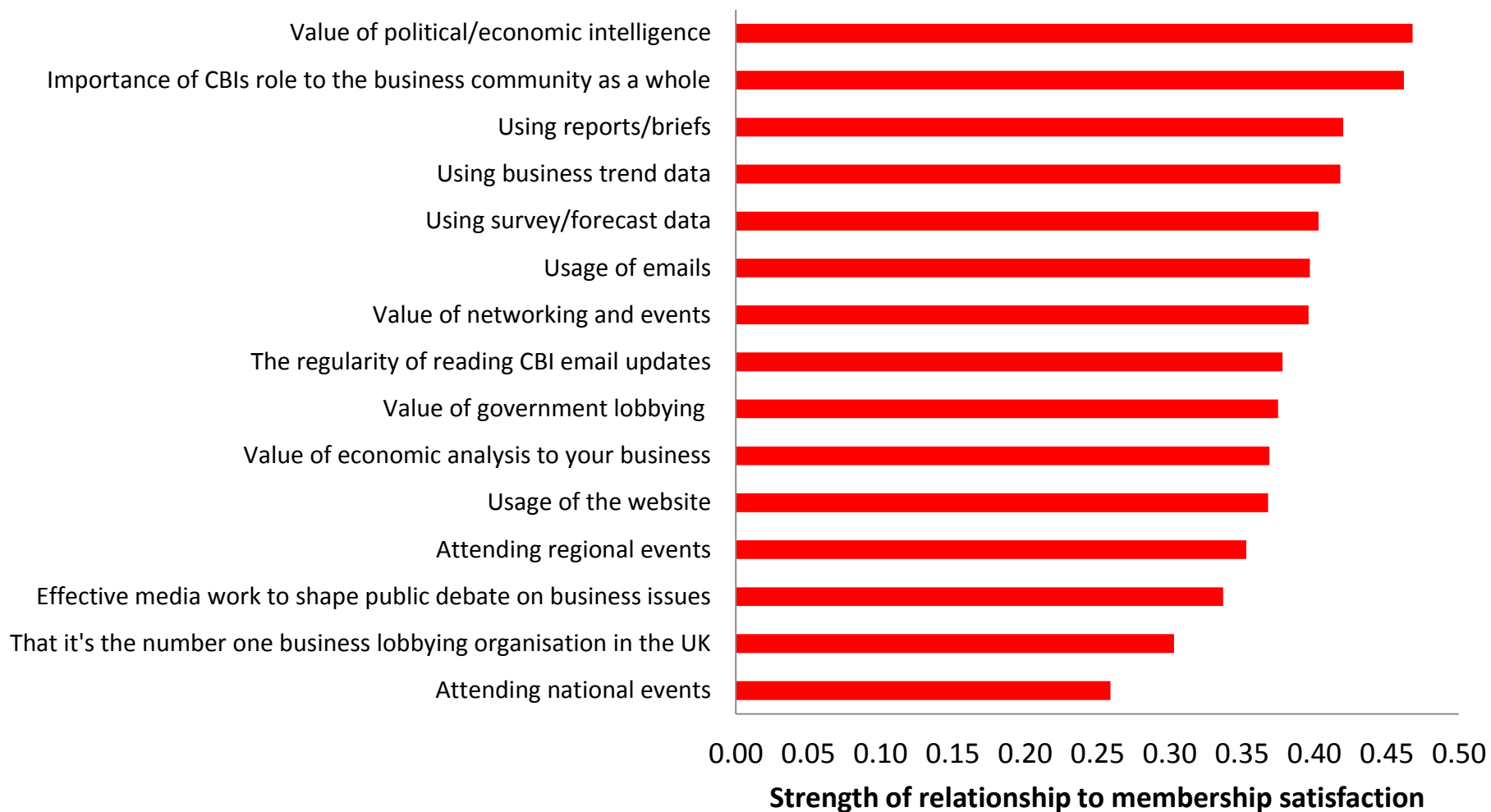
## **Section B: Assessing the value of CBI membership**



# The majority of CBI members are satisfied with their membership but a third are currently neither satisfied or dissatisfied

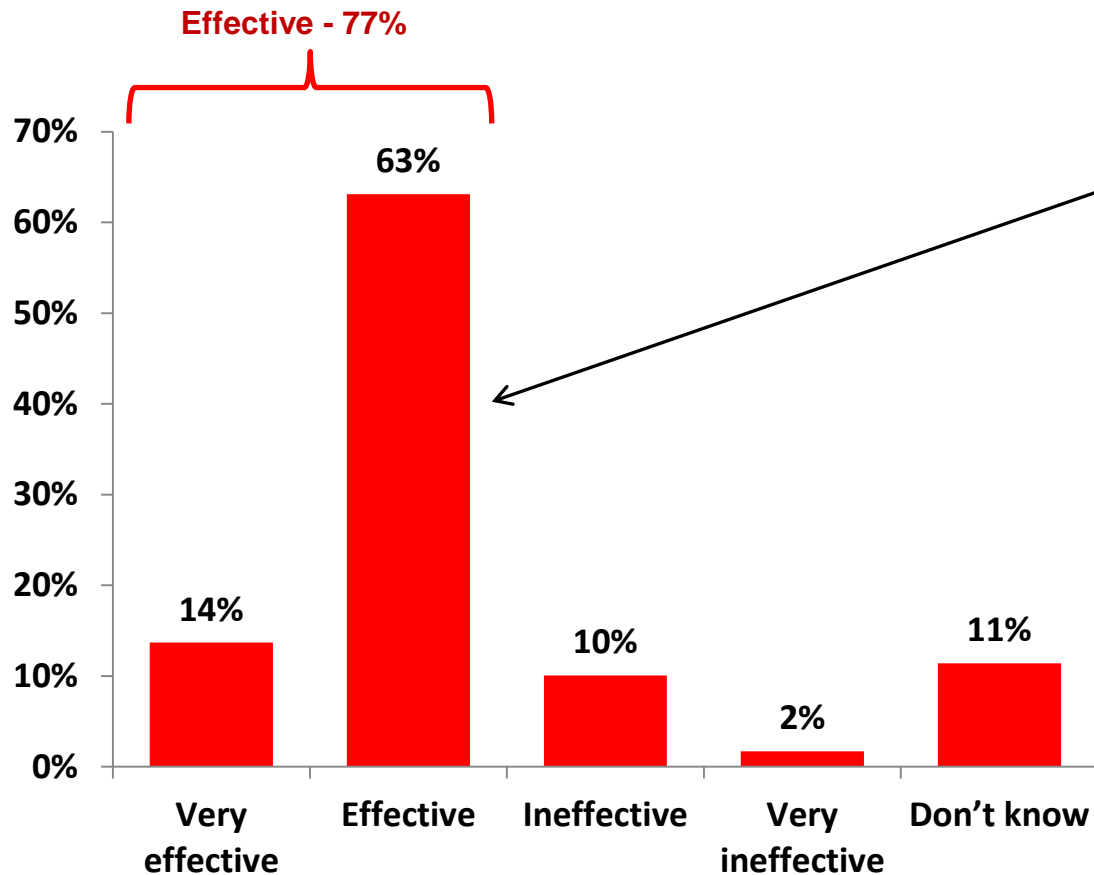


# Many aspects of membership are significant, but the value of political / economic intelligence and the wider importance to business community are especially strong



# The CBI's media work is perceived as effective by over three quarters of members

How effective or ineffective do you think the CBI's media work is in helping to shape the public debate on major business issues?

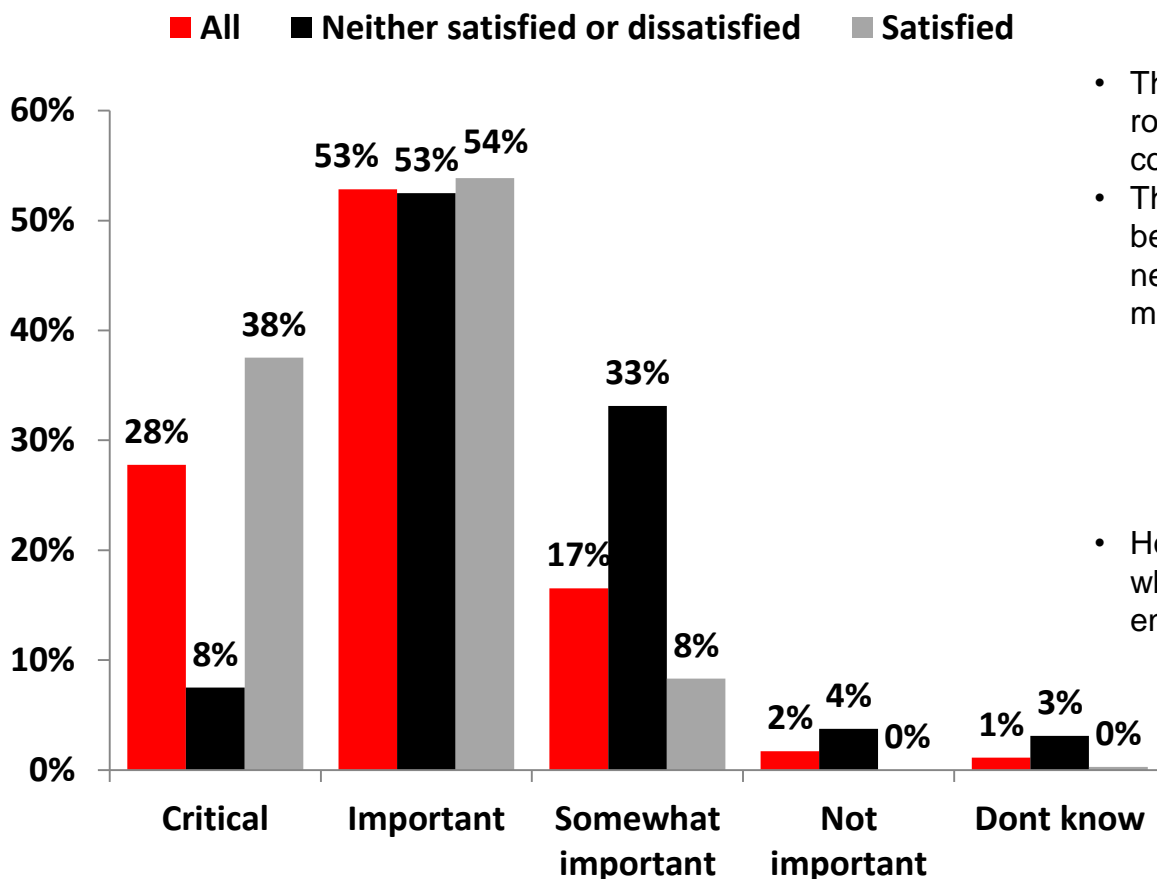


Manufacturing and production firms are more likely to feel that the CBI's media work is effective than the private sector services sector (81% of manufacturing and production compared with 74% of private sector services)

Base = All (n=526)

# Over a quarter of CBI members feel that the CBIs role is critical to the business community

How important do you believe the CBIs role is to the business community as a whole?

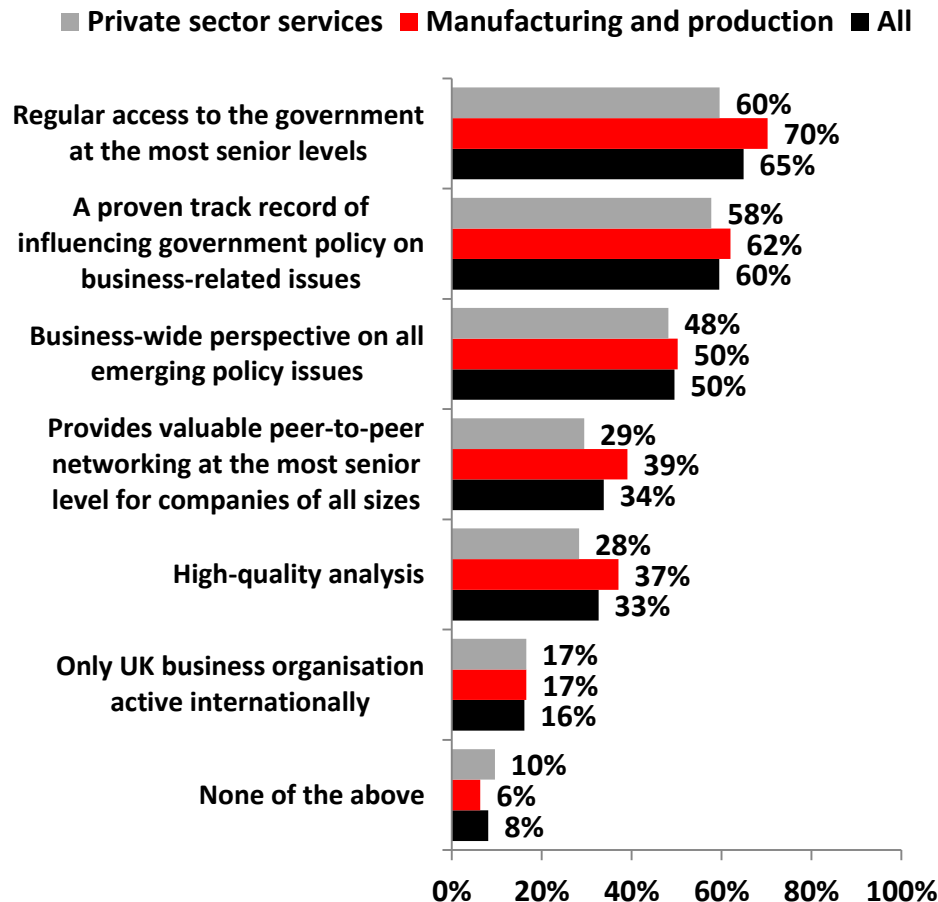


Base = All (n=526), neither satisfied or dissatisfied (n=160), satisfied (n=349)

- The broad consensus is that the CBIs role is important to the business community
- The difference in the strength of feeling between those satisfied and those neither satisfied or dissatisfied with their membership is clear:
  - 38% of those satisfied report the CBIs role is critical
  - Just 8% of those neither satisfied or dissatisfied feel the CBI has a critical role
- How do we energise the passive group who see the CBI role as important but engage less through their membership?

# 85% of CBI members are a member of another business representative group

In which of the following ways, if any, do you think the CBI is stronger than other business representative bodies?



- The CBI stands out as providing regular access to the Government at the most senior levels (65%) and in having a proven track record of influencing Government policy (60%)
- In comparison to other business representative groups, the CBI is considered to be less strong in providing Peer-to-peer networking (34%), high quality analysis (33%) and being the only UK business organisation active nationally (16%)
- The manufacturing and production sector is significantly more likely to report the CBI is stronger at peer-to-peer networking and high quality analysis than the private sector services sector

Base = All (n=521), Manufacturing and production (n=205), private sector services (n=272)

# The unrivalled voice of the CBI representing business is the top of mind value for most members

**BEST WAY OF LOBBYING WITH GOVERNMENT**



*"It allows us to put our views, in terms of what business needs, and the CBI portray those views to the government and a wider audience, a higher audience than we could achieve, based on the size of company we are.... the CBI's one that we feel has the biggest impact."*  
– Neither satisfied/nor dissatisfied member, Manufacturing (250 to 999 employees) - London

*"I mean certainly the policy and the lobbying side is absolutely front and centre of what the CBI is there to do, to represent British business in its entirety" [...]* "The impact on policy that the IOD or any other body have is a level down from what the CBI has." – Satisfied member, Energy, (250 to 999 employees) – North West

**BEST WAY OF GETTING NOTICED**



\*both cartoons from the Chairman's Committee workshop

# .. and is acknowledged as the nr. 1 lobbying organisation in the UK by most (satisfied and mixed respondents)

*"It's certainly unique in its access to senior politicians" - Satisfied member, Manufacturing, 1000+ employees, London*

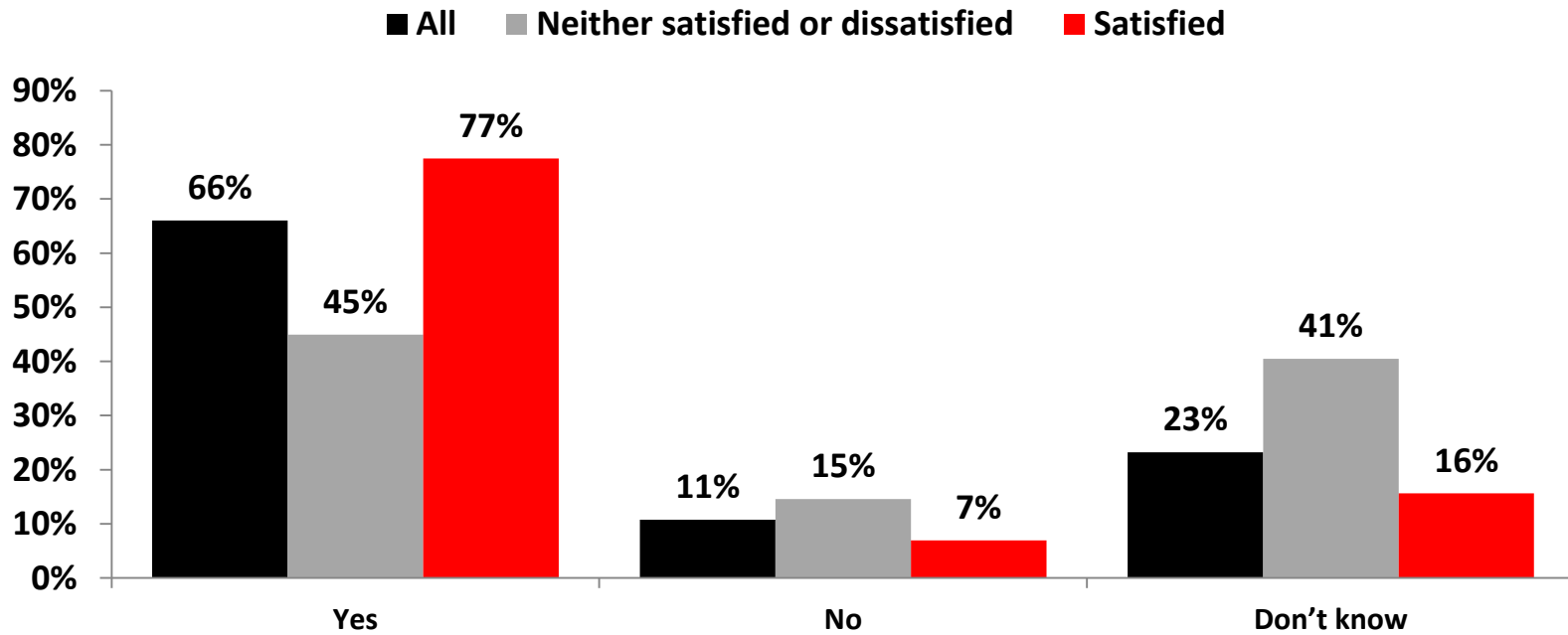


- **Lobbying is what most members associate CBI with – specifically lobbying for large business in the UK**
  - Some smaller organisations who have become members of the CBI recently have been surprised by the interest the CBI has shown to represent their business interests
  - CBI is seen as an ‘advocate of business’ and is seen to strengthen the ‘sector voice’
  - For international businesses [with head offices outside the UK) it is part of consolidating their position as part of the UK business community
- **The unrivalled access to senior politicians and the influence of senior members of the CBI were often quoted as setting the CBI apart from other organisations**
- **Beyond that, many feel that the CBI is better able to represent industry sectors to government than the industry groups are themselves**
  - CBI can contextualise its message to reflect the importance to the UK as a whole, which allows government to see beyond the motivations of the sector representing its narrower interests
  - CBI has also demonstrated its flexibility to adjust as and when policy issues emerge
  - Members value the opportunity to access debates on wider issues – education, climate change etc.

# In fact two thirds of CBI members feel that the CBI is the number one business lobbying organisation in the UK

- A much higher proportion of those members who are satisfied with the CBI feel they are the number one business lobbying organisation in the UK
- Two fifths of those that are neither satisfied or dissatisfied with their membership don't know whether the CBI is the number one business lobbying organisation in the UK – are they not engaged enough to know the role and impact of the CBI?

**In your opinion, is the CBI the number one business lobbying organisation in the UK?**



Base = All (n=526, neither satisfied or dissatisfied n=160, satisfied n=349)

# On the flip side, some are unsure how to influence policy decisions and whether the CBI is always listening to members' needs



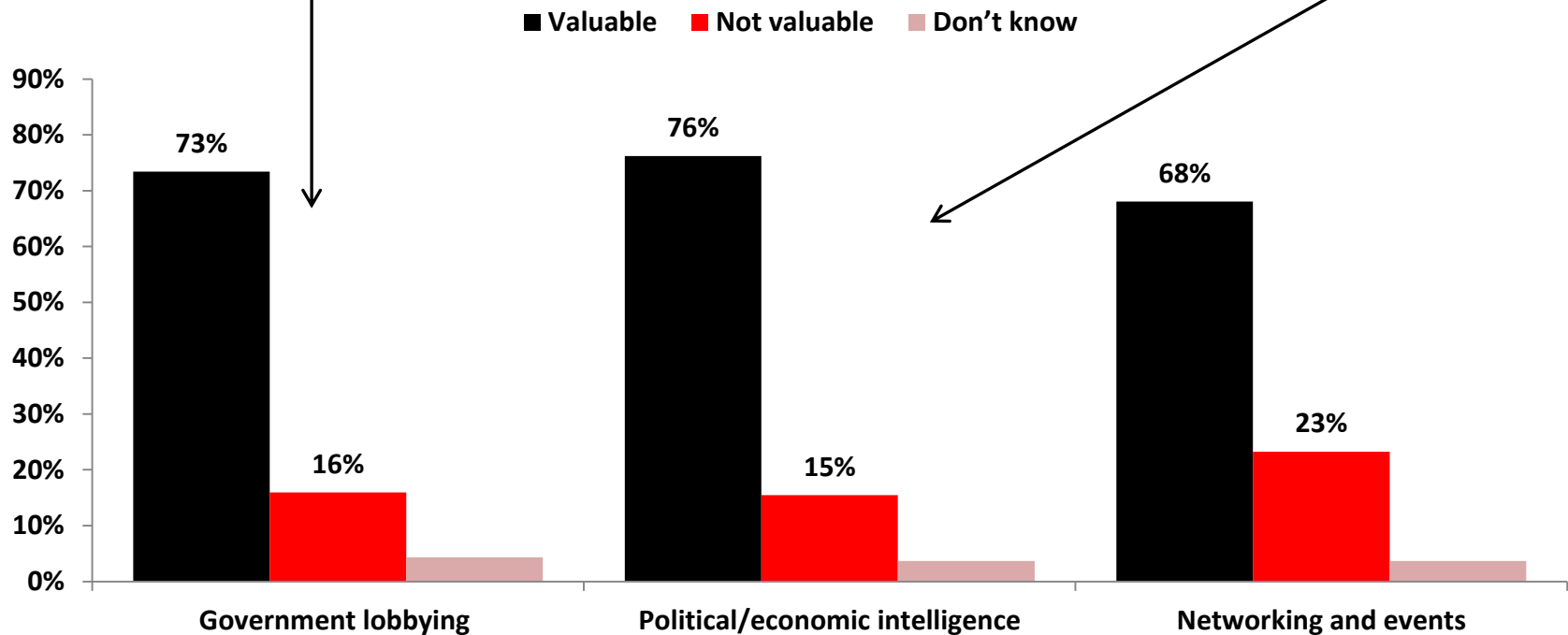
- **While for most the power and influence of the CBI into Whitehall is undisputed, this is not necessarily the most important element of the membership for all members.**
  - For big businesses whose interests are represented by multiple organisations, access to networking events and political/economic intelligence can be equally if not more important
  - Smaller businesses can feel removed from the 'macro' issues
- **Some acknowledge that lobbying was not a driver for membership initially – but have come to see the value and importance of the power of the CBI**
  - For some it has overcome a feeling of 'no-one listening to you'
- **The ability to contribute to government policy and in being the business groundswell the CBI is seen to have the power to affect change.**
  - However, while it is good that the CBI functions as a conduit for business voices, there is a concern that it needs to be more than that; a platform for debate
  - Some feel that not enough business opinion is fed bottom-up through the CBI and too much is coming top-down– it is not always evident where the debate is being driven from

# While all services are considered valuable, government lobbying and political/ economic intelligence top the list.

## How valuable are the following high-level CBI services to you personally?

- The Manufacturing and production sector (79%) are significantly more likely to find government lobbying valuable than the private sector services sector (67%)

- The Manufacturing and production sector (82%) are significantly more likely to find political/ economic intelligence valuable than the private sector services sector (71%)



Base = All (n=625), Manufacturing and production (n=244), private sector services (n=329), SME's (n=174), Large (n=451)

# The CBI has credibility – this is as much to do with the trusted public profile as trust in the content of its political & economic analysis

*"I just don't think there's anybody else who can walk into government at the same level as they can and get their points across. It really is quite astonishing when you just read down the list, somebody is seeing the Prime Minister, somebody is seeing the Chancellor, somebody is seeing a Secretary of State here, Secretary of State there, minister here, shadow minister there" – Satisfied member, Energy, (250 to 999 employees) – North West*

*"I certainly read the economic analyses very avidly as they come out, the weekly update on e-mail on, you know, economic background and major moves that the organisation is making-, are all extremely useful. The economic analysis is very good." – Satisfied member, manufacturing (10 - 20 employees), South West*



*"I do trust and read the CBI e-mails and supplements. I do read them because I believe that most of the members of CBI who fill out the surveys, do so with the genuine interest of reading them as well. So they are valid and useful and I do rely on them" - Satisfied member, manufacturing, 1000+ employees, South East*



Highly satisfied participants value the political and economic analysis and the role it plays in their business

\*Liverpool cartoon

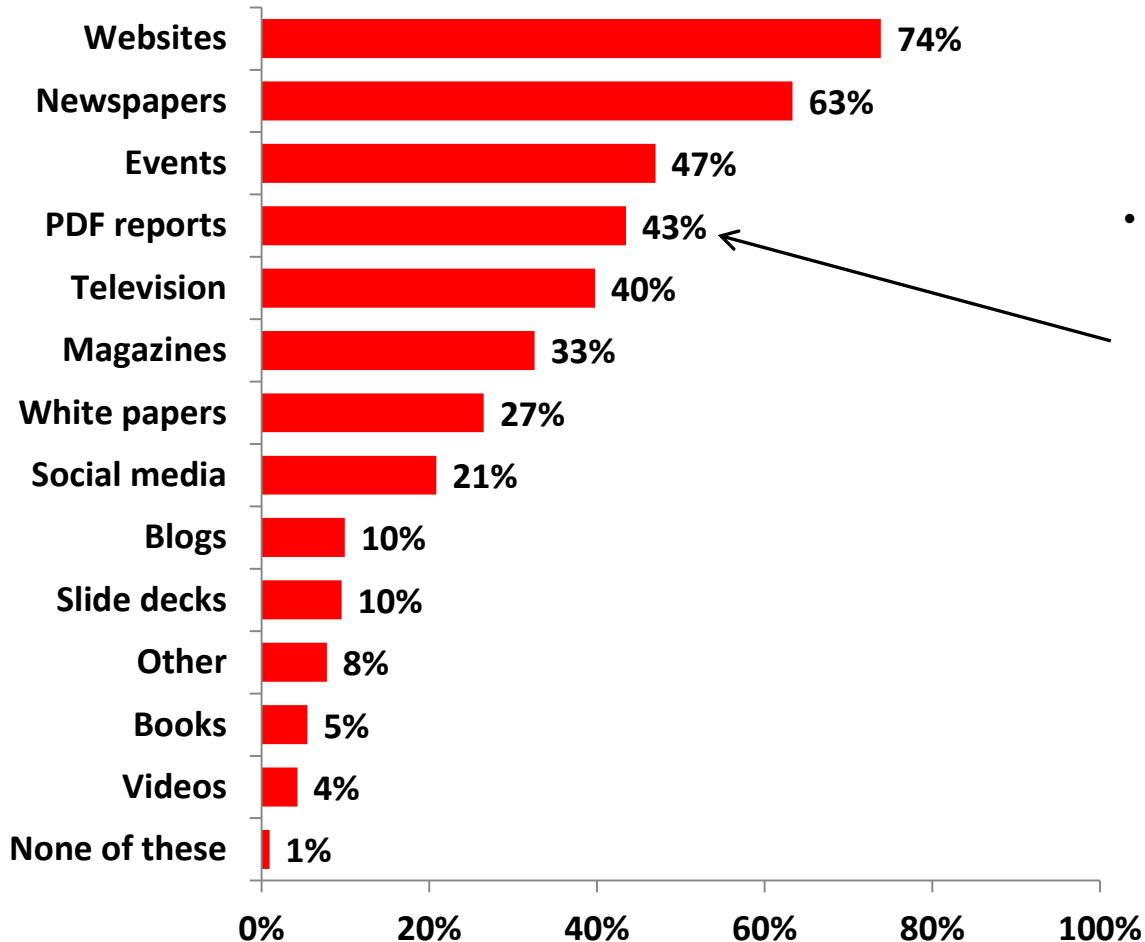


## Section C: Communicating



# Websites and print media remain the most important channels from which members gain business intelligence

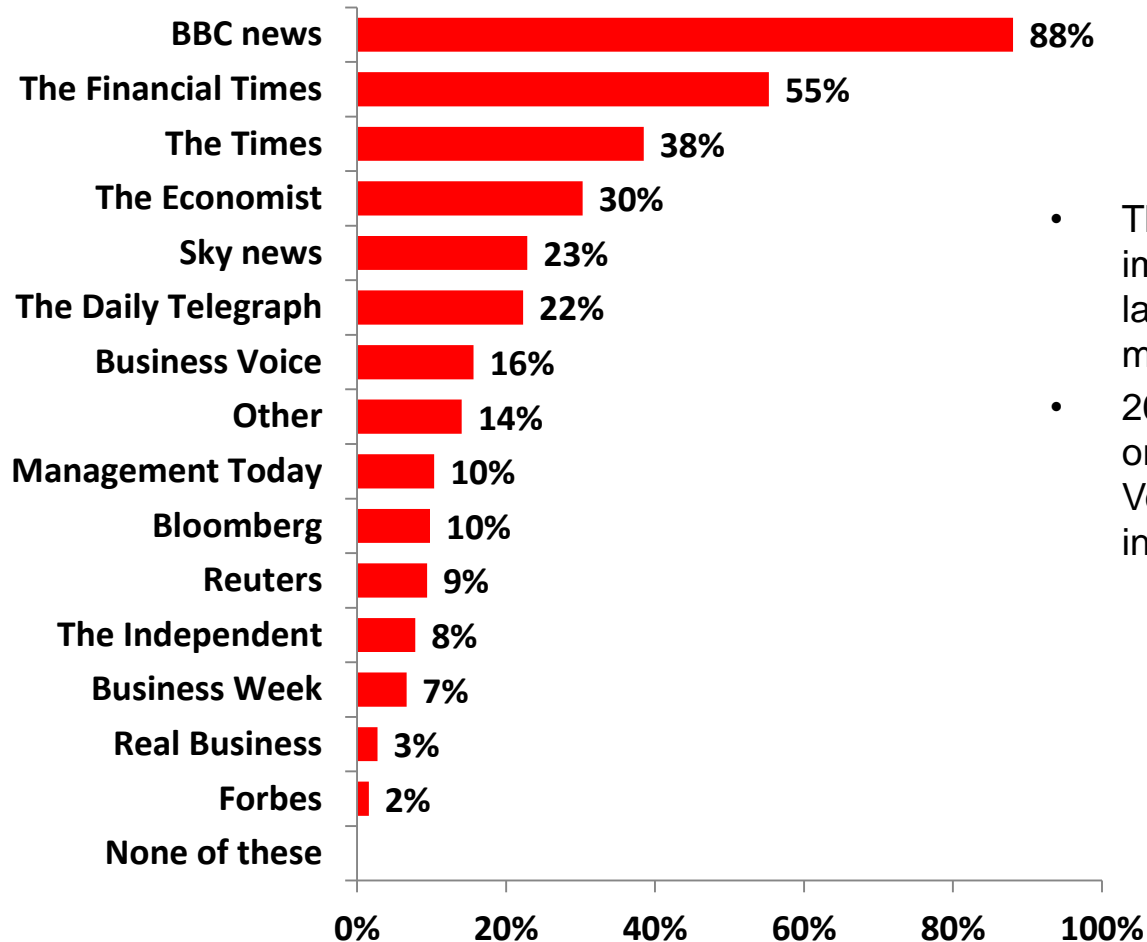
Thinking about your everyday business, which of the following business intelligence sources are most important to you?



- Members from the manufacturing and production sector (49%) and large organisations (47%) are significantly more likely to see PDF reports as an important source than the private sector service sector (39%) and SMEs (35%).

# BBC news stands out as being the most important business intelligence source

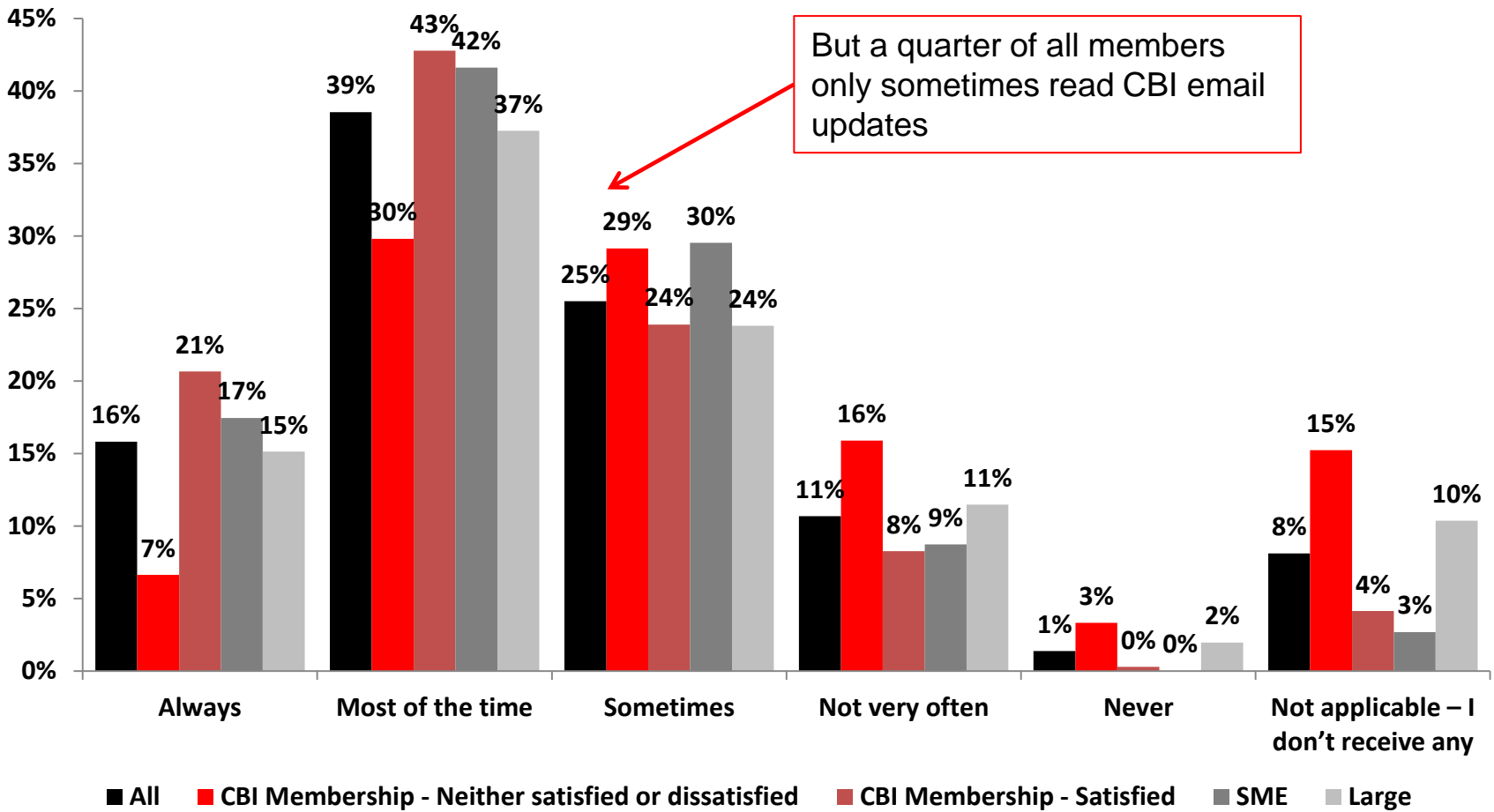
Thinking about your everyday business, which of the following business intelligence sources are most important to you?



- The Financial Times is a more important source for members from large organisations (59%) than members in SMEs (47%)
- 20% of SMEs and 14% of large organisations feel that Business Voice is an important business intelligence source

# Over half (55%) of CBI members always or most of the time read CBI email updates

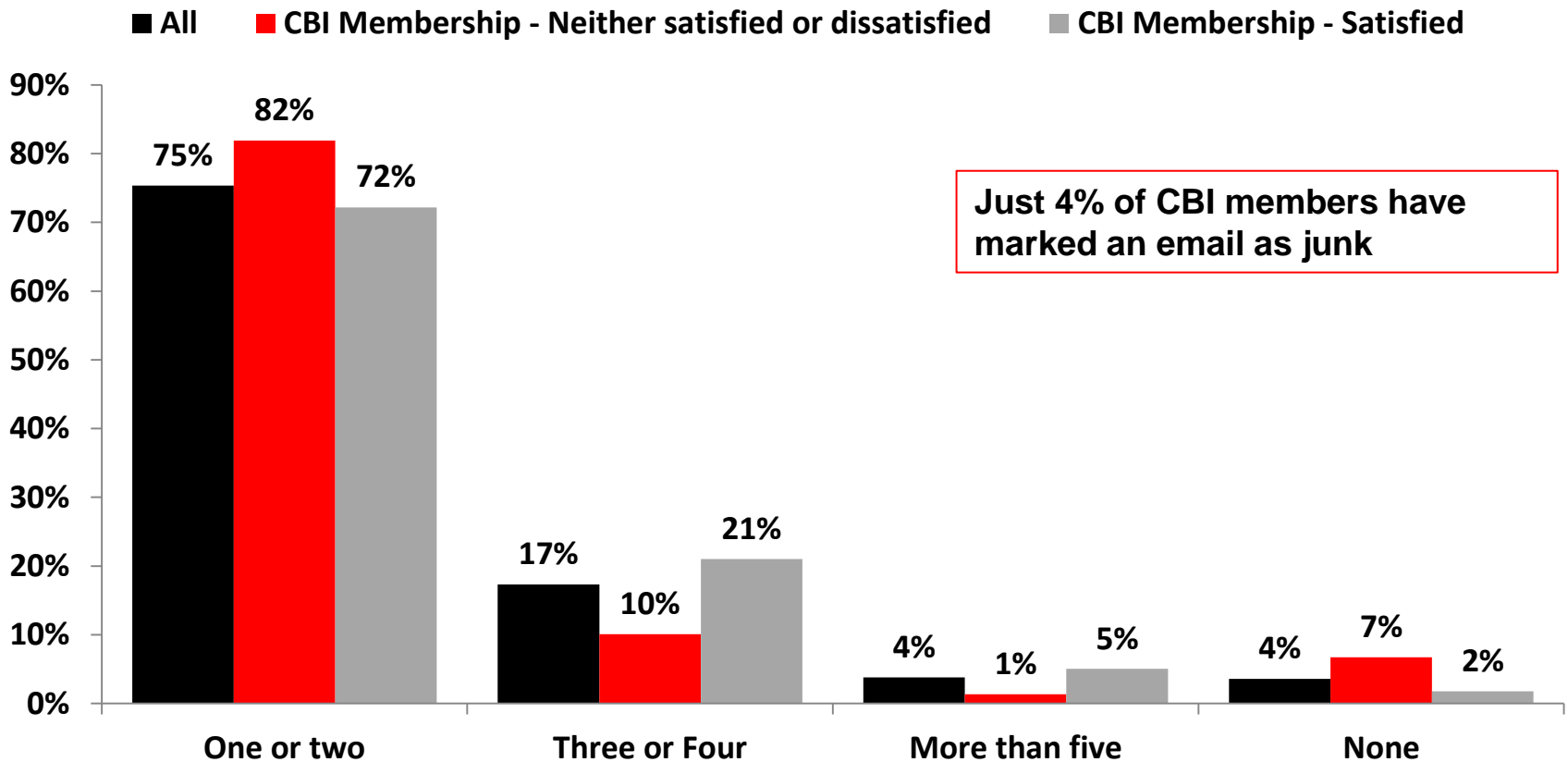
## How often do you read CBI email updates?



Base = All (n=506), neither satisfied or dissatisfied (n=151), satisfied (n=339), London (n=132), North (n=77), Midlands (n=84), South (n=99)

# One or two emails a week is the optimum number that CBI members are prepared to read each week

Ideally and to have the most impact, how many CBI emails are you prepared to read per week?



Base = All (n=503), neither satisfied or dissatisfied (n=149), satisfied (n=338)

# Digital communications/emails are most widely used as the primary source of information

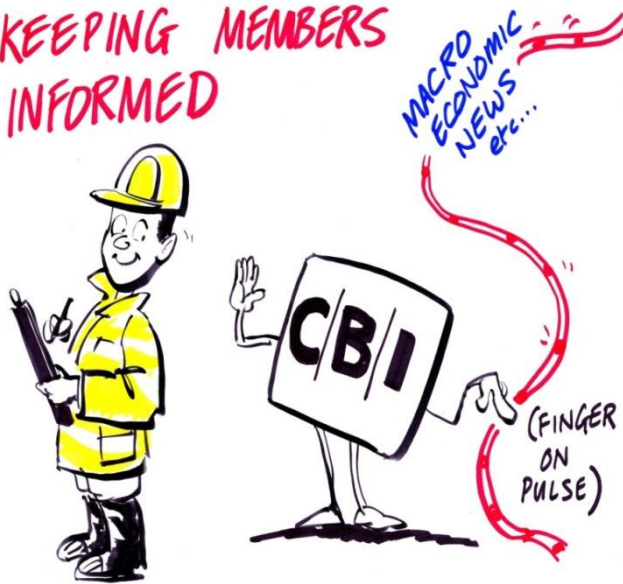
- **Emails are not always read but beyond face-to-face and phone interactions they are the preferred way to be kept up to date by the CBI**
  - Emails work because they can be read on the move from a variety of devices
  - However, not everyone reads their emails and some feel they are receiving too many emails – one email a week that is part tailored to members' needs and interests is seen as the optimum
- **Members are happy with the style and the quality of the writing but some admit they are not always tailored enough to their needs (= big picture + sector information for most)**
  - Tend to scan emails for information of interest – has to be short and concise – summary is important
- **Some members are not receiving any emails –others are only receiving some of the emails (and are worried they may be missing out on useful information)**
  - Members do not always know what information they can get access to – receiving an opt in/out email with all the available email subscriptions is seen as an easy solution to this

*“Yes, to be honest, if I was to receive more emails from the CBI, that wouldn't add any value, because I struggle to read the emails that I get today anyway. It would be quite hard-, you may know what it's like, we all get dumped with a whole load of information, and there's only so much you can actually sit down and process” - Dissatisfied member, Agriculture, forestry and fishing, 250 to 999 employees – South East*

*“The main issue for me, is getting sector specific information, and if it could be more targeted in that respect, it could be very useful. So the mechanism for getting the message to me, is less important than the structure of the targeting of the message” - Neither satisfied or dissatisfied member, Manufacturing, 250 to 999 employees, London*

# The CBI is great at communicating at a high level – but this does not always translate into keeping members included and informed

## KEEPING MEMBERS INFORMED



- Particularly those not already attending regional meetings can feel they are missing out
- There is a sense that not all members can influence opinion
  - A need for a more bottom up approach – rather than top down

- Call for a two – way communication flow
- Social media might provide opportunities to engage on a more regular basis, facilitating discussions online.



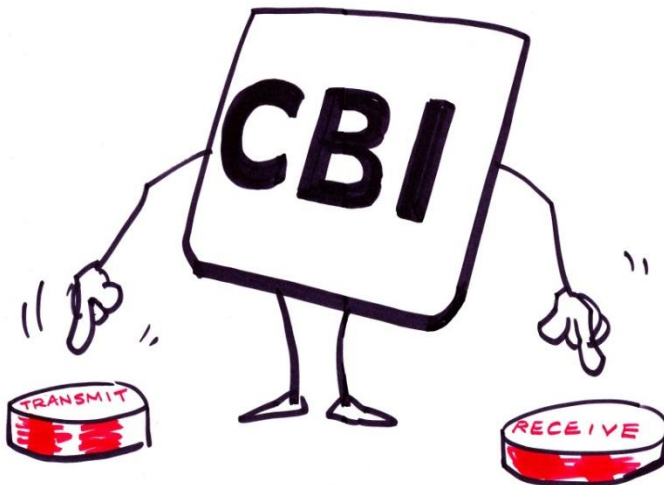
# The main communication issue is the flow of information TO the CBI FROM members and more targeting in dispersal of information

*"CBI folks can be very focused on the political side....I think sometimes they need to ask 'is this something we are interested in because we are the CBI or because it's something our members will be interested in?" - Satisfied member, manufacturing, 1000+ employees, London*

**•CBI is good at 'broadcasting' information but not receiving from members**

•The M-Club report has been a revelation in terms of engaging those who traditionally have not been very involved

**HAVE TO PRESS BOTH BUTTONS!**



*"I think they're absolutely right to think their real expertise is in influencing government policy and doing that rigorous thinking, but they need to do that not in an ivory tower, which is what they are in. They need to do that closer to their members, and they need to do bottom-up generation, both on the issues and on their policy thinking by engagement with members, rather than telling them." - Satisfied member, consultancy services, 2 -9 employees, North East*

# Improving communications

- **The CBI can send out a lot of information but it is not always targeted enough – granularity of information is key**
  - However for many, the CBI is about getting the information about ‘the bigger picture’
- **Podcasts are seen to be done well by the CBI’ and there is some interest in Webinars**
  - They have to be relevant, of high quality and well executed – e.g. podcasts by senior members of the CBI
- **Business briefing information – e.g. written in an executive summary style is the preferred format for members**
  - With limited time at their hands, having a one pager that sums up the key findings is what members are after
- **Other communications**
  - LinkedIn
  - More opportunities for members to interact – forums/blogs
  - Giving results back to members and sharing successes

*“Yes I can, particularly for perhaps the executive-, with the breakfast briefings and the lunches, there’s always a speaker. Now, if I can’t get to that particular one because of date clashes, or other commitments, I would welcome an opportunity to be able to see that, whether it be a webinar or podcast, so yes” - Neither satisfied or dissatisfied, Manufacturing, 250 to 999 employees, London*

*“It’s really hard work, but it’s about targeting information to the right members, because if you give me stuff that’s not sector relevant to me, unless it’s a game-changer in the economy, I’m not really bothered about it. I don’t want to have my time wasted, you know, deleting stuff that’s not relevant, so it’s really about, making sure when you’re sending data, that it’s sector relevant to me as a member” - Dissatisfied member, Agriculture, forestry and fishing. 250 to 999 employees, South East*