Livestock Keeper Satisfaction and Communication Survey Results

Prepared for:

AHVLA

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Contents

1 Executive Summary

This section provides a brief summary of the research project conducted. Further detail is available within the specific sections referenced in brackets.

Introduction *(Section 2)*
ORC International was commissioned by the Animal Health and Veterinary Laboratories Agency (AHVLA) in February 2014 to conduct a satisfaction and communication survey with livestock keepers.

Methodology *(Section 3)*
The findings in this report are based on 403 telephone interviews conducted with livestock keepers across Great Britain between Wednesday 5 March 2014, and Friday 28 March 2014. The response rate for this survey was 33%.

Key Driver Analysis was also conducted in order to determine the aspects of the customer experience that had the strongest association with overall satisfaction with AHVLA.

Respondent profile *(Section 4)*
A broad range of livestock keepers were surveyed across England, Scotland and Wales with a range of different job titles, ages, and livestock. Seven in ten livestock keepers surveyed kept cattle (70%), more than four in five (45%) kept sheep, and nearly four in ten (36%) kept poultry or birds.

Respondents had different means of accessing AHVLA services; a third were direct service users (34%) a further third used AHVLA services via an intermediary (31%), and a smaller proportion (23%) both used AHVLA services directly and via an intermediary. The remaining twelve per cent reported that they did not use or have experience of AHVLA services.

Awareness of and Interactions with AHVLA *(Section 5)*
When asked about AHVLA's role and responsibilities, 50% of respondents said that AHVLA was responsible for providing advice and information about animal health and welfare, 31% said that they conducted on farm testing (31%), and 24% said that AHVLA was responsible for prevention of disease and disease outbreak. These figures represent a marked increase from figures reported in 2012, suggesting an increase in awareness of AHVLA's responsibilities.

The frequency of interaction with AHVLA reported by AHVLA service users varied. Current service users reported interacting with AHVLA "regularly" (defined as monthly with only 8% of current service users providing this answer), "sometimes" (defined as once every two to three months; 17%), or "rarely" (once or twice a year; 48%). A further quarter of AHVLA service users (26%) were defined as lapsed users, as they had used AHVLA services in the past, but were not using them currently.

Current AHVLA service users reported using a range of AHVLA services. The service most likely to be used directly was issuing licenses (56%), and the services most likely to be used indirectly (via an intermediary, or agent) were laboratory testing (52%) and on farm testing (50%).Figures for service usage compared favourably to 2012, and suggested an increase in usage across several service areas.

Satisfaction with AHVLA Services *(Section 6)*

Current AHVLA service users rated satisfaction with AHVLA services as relatively consistent across all service areas. AHVLA's laboratory testing service received the highest satisfaction rating (scoring 8.1 out of 10), and AHVLA's compensation payments service received the lowest satisfaction rating (7.0).

One in five AHVLA service users (18%) reported that they were dissatisfied with AHVLA's written communications.

Current AHVLA service users rated the importance of all customer service factors very highly, however actual satisfaction with these customer service factors was more muted. The largest disparities between stated importance, and rated satisfaction related to time taken to respond to queries and issues, and the quality of resolution to queries and issues.

As outlined in Section 7, Key Driver Analysis calculated the derived importance of satisfaction with AHVLA services and customer service factors in relation to overall satisfaction with AHVLA.

Overall satisfaction with AHVLA *(Section 7)*

Overall satisfaction with AHVLA was rated as 7.4[1] out of 10. Overall customer satisfaction with AHVLA is in line with the performance recorded against comparable Government Departments and Agencies who provide business to business services, as recorded on ORC International's benchmarking database.

Areas of strength for AHVLA include AHVLA staff and information, which our analysis also indicated as the top key driver of overall satisfaction with AHVLA, and an area where AHVLA is performing well.

Key Driver Analysis also highlighted a number of areas where AHVLA should look to improve: query resolution and written communications were found to be the second and third

[1] This is in line with the overall satisfaction score reported in 2012, although these scores are not directly comparable due to differences in sampling between the 2012 and 2014.

key drivers (respectively) of overall satisfaction with AHVLA. Due to the strength of association between these areas and overall satisfaction with AHVLA, we would expect any service improvements in these areas to also contribute to an increase in overall satisfaction with AHVLA.

Overall perceptions of AHVLA *(Section 8)*

Perceptions of AHVLA were mixed, with AHVLA service users more likely to agree that AHVLA is an organisation that they can trust (7.8), than an organisation they hear good things about (6.6), or an organisation that understands their business needs.

Advocacy was strong, as four in five users of AHVLA's advice service (78%) would recommend the advice service to other farmers, and a similar proportion of AHVLA's general service users (81%) would speak well of AHVLA's services to other farmers.

Sources of Information and Advice *(Section 9)*

Most livestock keepers reported using two (61%), or three or more (37%) sources of information and/or advice on animal health and welfare related issues. The most popular source of advice was private veterinary surgeons (83%). One in ten respondents (10%) reported normally seeking information from AHVLA.

Preferences for routine correspondence were dominated by post (54%) and email (33%). In an emergency, preferred communications channels were telephone (69%), email (15%), and SMS text message (8%).

Eight in ten respondents (80%) reported having used the internet over the past 12 months, whilst only two in ten respondents (20%) used Facebook, and one in ten respondents (9%) used Twitter.

Conclusions *(Section 10)*

Whilst AHVLA is performing well, and overall satisfaction is in line with both satisfaction recorded in 2012, and ORC International's Government Departments and Agencies benchmark, two main areas have been identified as areas for improvement. Improvements in query resolution and written communications could help to transform AHVLA's services from being in line with other organisations, to being recognised as delivering best practice services with wider Defra.

Recommendations *(Section 11)*

Three areas for action have been identified:

1. **Promote and celebrate high satisfaction with AHVLA staff and information**, so that success is shared with AHVLA staff, they recognise the importance of the high

quality service provided to AHVLA customers, and can maintain the current high standards in this area.

2. **Improve query resolution**, as any improvements in this area are expected to increase overall satisfaction with AHVLA (based on our Key Driver Analysis).

3. **Improve written communications,** as any improvements in this area are expected to increase overall satisfaction with AHVLA. Further research may be beneficial in this area to uncover any specific issues with written communications.

2 Introduction

2.1 Background

ORC International was commissioned by the Animal Health and Veterinary Laboratories Agency (AHVLA) in February 2014 to conduct a satisfaction and communication survey with livestock keepers.

AHVLA is an executive agency working on behalf of the Department for the Environment, Food & Rural Affairs (Defra), Scottish Government and Welsh Government. The agency was formed in April 2011, following the merger of Animal Health and the Veterinary Laboratories Agency.

As Defra increasingly looks to operate as 'one business' – in line with the Defra Network Strategic Alignment - the department needs to develop a future business model that is more strategic, flexible and resilient. This will involve increased coordination across the structures, systems and processes of Core Defra and its Network to deliver a better customer experience at a lower cost. As part of this work, AHVLA are introducing transformational changes and establishing common 'best practice' across all its activities. The ultimate aim is to reduce costs, increase revenues, improve customer service, manage relationships more effectively and create sustained increases in organisational capability.

A key element involves delivering improved customer service built upon a stronger customer focus that will ultimately deliver beneficial knock-on impacts in terms of overall organisational performance. In providing improved customer service AHVLA will look to develop a:

"… greater understanding of the needs of its service user and policy customers; and the practical actions taken to become more responsive to these needs to improve the 'customer experience' of interactions with the Agency."

This focus on improving customer experience is taking place at a time of increased change and challenge across the public sector with ongoing spending cuts and a requirement to transfer customers to more cost-effective forms of online service delivery and away from more resource intensive channels such as call centre helplines and face-to-face enquiry centres (in line with 'digital by default' agenda). At the same time there is also a need for Government agencies to realise further efficiencies through the provision of excellent customer service: enabling customers to enjoy streamlined, accurate interactions, thus reducing the need for follow-up support, interventions and enforcement activity (getting it right first time).

All of these issues have a clear relevance to AHVLA's requirements to improve their customer services to their end user customers.

2.2 Research Aims and Objectives

The overall aim for the research survey was to gain an in-depth understanding of customer perceptions, experiences, attitudes and motivations in relation to their interactions with the AHVLA.

Beyond this, the key research objectives were to:

- Establish awareness and perceptions of the purpose and role of the agency which could positively influence AHVLA communications with service users.
- Establish levels of satisfaction with AHVLA services and interactions. This will also need to account for the key drivers of satisfaction and understanding what is most important when dealing with AHVLA from the customer perspective.
- Identify the preferred ways of communicating in different situations and possibly with different customer groups.
- Establish levels of engagement with newer media to gain insight to support the digital by default agenda and to better understand the sources of guidance that livestock keepers might refer to.
- Establish levels of trust in the agency and other providers of information and advice.
- Measure performance standards against AHVLA's published customer service standards based upon the outcome of customer experience.
- Gain key insights into key issues related to each species group, and by country and region.

Where possible, the research also aimed to maintain consistent questions, where further performance and any changes could be tracked in relation to previous customer survey work completed for AHVLA.

3 Methodology

The findings in this report are based on 403 telephone interviews conducted with livestock keepers across Great Britain between Wednesday 5 March 2014, and Friday 28 March 2014. The response rate for this survey was 33%.

Key Driver Analysis was also conducted in order to determine the aspects of the customer experience that had the strongest association with overall satisfaction with AHVLA.

This project was conducted in compliance with ISO 20252.

Full details on the methodology, response rate and research materials are included in Appendix A.

3.1 Reporting Conventions

Differences in findings are only noted where they are significant at the 95 per cent confidence level. A 'significant' difference is statistically valid, and so likely to be due to real differences in the population and not due to chance. The measure used means that we can be 95 per cent confident that significant differences reported are not due to chance.

The report focuses on the main findings from the 2014 Livestock Keeper Satisfaction and Communication Survey. It includes sub group analysis by:

- **Location:** split by South West England, South East England, Midlands, North England, Wales and Scotland.
- **Type of Farming:** across cattle, sheep, poultry/bird, pig and horse keepers[2]. Analysis is also included by whether the respondent kept one or two or more types of animals, and whether the respondent was a livestock farmer (where farming provided their main income), or a hobby farmer (where farming did not provide their main income).
- **Age of Livestock Keepers:** 24 and under, 25-44, 45-64, 65+.
- **Overall nature of relationship with AHVLA:** respondents were classified as direct users, those who access AHVLA via an intermediary, those who access some services directly, and others via an intermediary, and those with no experience of AHVLA services. Please note, those who have experience of accessing AHVLA

[2] Where a respondent is referred to a specific type of animal keeper (for example a cattle keeper, or a pig keeper), they may or may not also keep other animals.

services (either directly, via an intermediary, or a mixture of both) are referred to as ***AHVLA service users.***

- **Frequency of relationship with AHVLA:** defined as “regular” users (once a month or more), those who “sometimes” access AHVLA services (once every 2-3 months), those who “rarely” access AHVLA services (once or twice a year), and those who are not currently using AHVLA services (known as ***lapsed users***). Those who use AHVLA’s services regularly, sometimes or rarely, are collectively known as ***current AHVLA service users*****.**

Previous trend data

Where relevant, comparisons are drawn to previous trend data. Where trend data is shown in relation to previous customer satisfaction surveys completed for AHVLA, it has been taken from the 2012 survey carried out by Kadence International.

Any comparisons drawn between 2012 and 2014 data, are only done so on an indicative basis, rather than as direct comparisons due to the differences in sample construction outlined below:

- **Respondent groups:** In 2014, AHVLA and ORC International agreed to focus the survey solely on the views of livestock keepers. *In 2012, livestock keepers made up 76% of all completed interviews, and interviews were also completed with individuals in the following areas: animal by products, industry groups, importers, egg production, food / pharmaceuticals, and private labs and transport.*[3]
    - Any comparisons between 2012 and 2014 results have therefore been based solely on findings related to livestock keepers reported in 2012, rather than on overall level results, which also included the additional respondent groups as detailed above.
- **Sample source:** In 2014, AHVLA and ORC International agreed to source the sample from an external sample provider on the basis of location, and specific Standard Industrial Classification 2007 codes (as explained further in Appendix A). *In 2012, respondents were sourced from the Farmers Panel run by Kadence International.*[4]
    - This further limits any comparisons between 2012 and 2014 results, as the livestock keepers surveyed in each year have been recruited from different sources (Kadence International’s Farmer Panel in 2012, and an external sample provider in 2014) and it is unclear how the sample sourced in 2012

[3] Kadence International (2012), *AHVLA Customer Insight Research*, page 18.

[4] Kadence International (2012), *AHVLA Customer Insight Research*, page 9.

differs from the sample sourced in 2014 in terms of location and specific Standard Industrial Classification 2007 codes.

Where appropriate, existing questions from the 2012 questionnaire were retained in the questionnaire designed by ORC International in 2014, in order to be able to make indicative comparisons on trend data.

4 Respondent Profile

Summary

- A broad range of livestock keepers were surveyed across England, Scotland and Wales across various job titles, ages, and livestock.
- Seven in ten livestock keepers surveyed kept cattle (70%), more than four in five (45%) kept sheep, and nearly four in ten (36%) kept poultry or birds. The 2014 respondent profile was slightly different to the 2012 respondent profile, and included a higher proportion of poultry keepers, and a lower proportion of cattle keepers[5].
- Nearly nine in ten livestock keepers (88%) reported that farming was their main income, and a similar proportion (86%) reported that they had been farming for over 20 years.
- Respondents had different means of accessing AHVLA services; a third were direct service users (34%), a further third used AHVLA services via an intermediary (31%), and a smaller proportion (23%) both used AHVLA services both directly and via an intermediary (23%). The remaining twelve per cent reported that they did not use or have experience of AHVLA services.

This section focuses firstly on a profile of the livestock keepers surveyed, secondly on the animals kept by these livestock keepers, and finally on the relationship that these livestock keepers had with AHVLA.

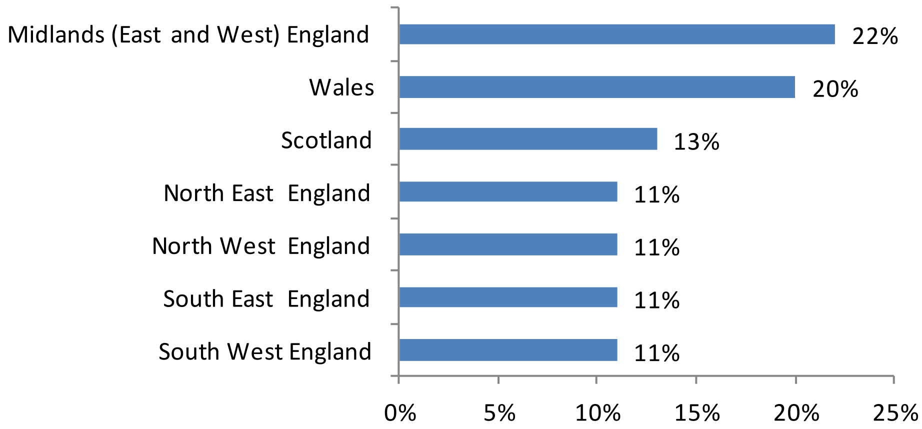
4.1 Livestock Keepers

Location

The animal keepers who participated in the survey were located across England, Scotland and Wales. As outlined overleaf in Figure 4.1, one in five respondents were located in the Midlands (22%), a further one in five (20%) were located in Wales, and the remainder were split relatively evenly between Scotland (13%), North East, North West, South East, and South West England (all 11%).

[5] Please refer to Appendix A for further detail on the sample requested. The changes in the proportions of poultry and cattle keeper respondents compared to 2012 were due to the natural fall out of the sample.

Figure 4.1 Location

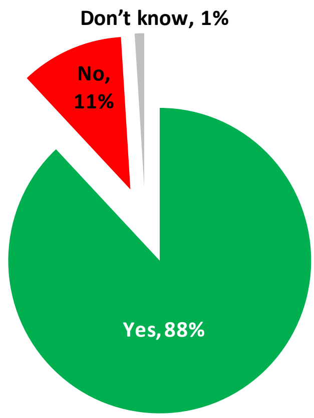


Location was taken from the sample. Base: 403 – All respondents.

Income

All respondents were asked whether farming was their main income or not. As illustrated below in Figure 4.2, nearly nine in ten (88%) reported that farming was their main income. Throughout the rest of the report, these respondents are referred to as "livestock farmers". The remaining one in ten respondents (12% overall) are referred to as "hobby farmers" throughout this report, as they either reported that farming was not their main income, or they did not know whether or not farming was their main income.

Figure 4.2 Income

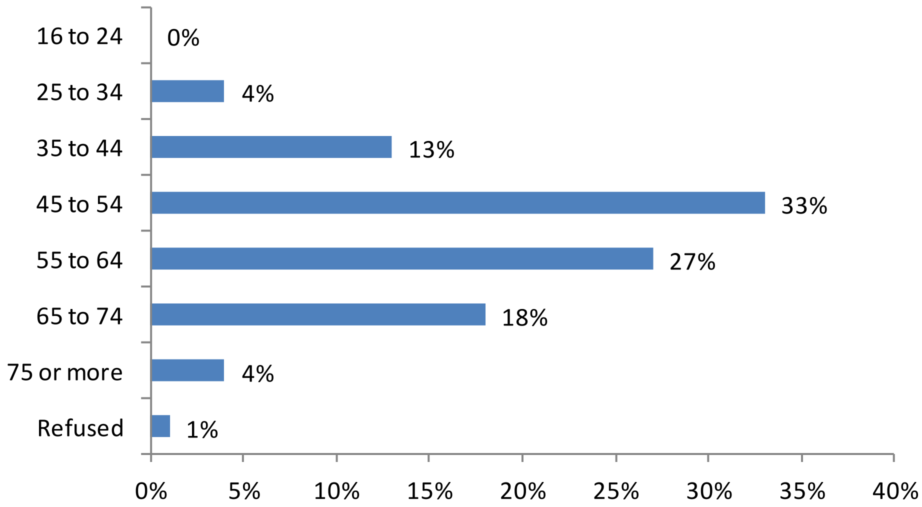


A8. Is farming your main income? Base: 403 – All respondents.

Age and Farming Experience

As outlined overleaf in Figure 4.3, half all respondents (49%) reported that they were aged 55 or more. Further to this, nearly all respondents (86%) reported that they had over 20 years of farming experience.

Figure 4.3 Age

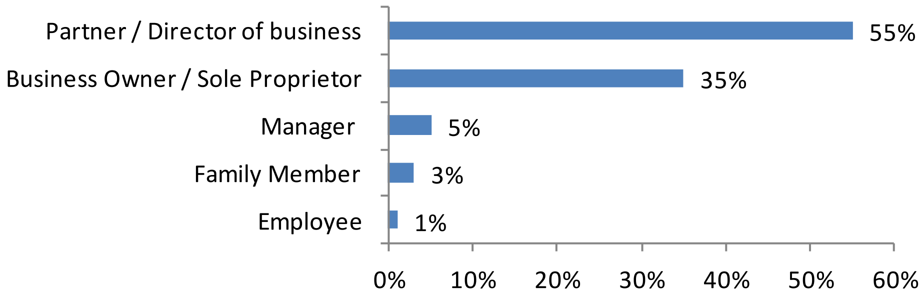


L1.Could you tell me which of the following age brackets you fall into? Base: 403 – All respondents.

Role in the Business

As illustrated below in Figure 4.4, respondents were generally in senior positions within their own business. Just over half reported that their role was akin to a partner or director of the business (55%), whilst a third reported that their role was more focussed on that of a business owner, or sole proprietor (35%).

Figure 4.4 Role in the Business



L2. What is your role in your business? Base: 403 – All respondents.

Internet access

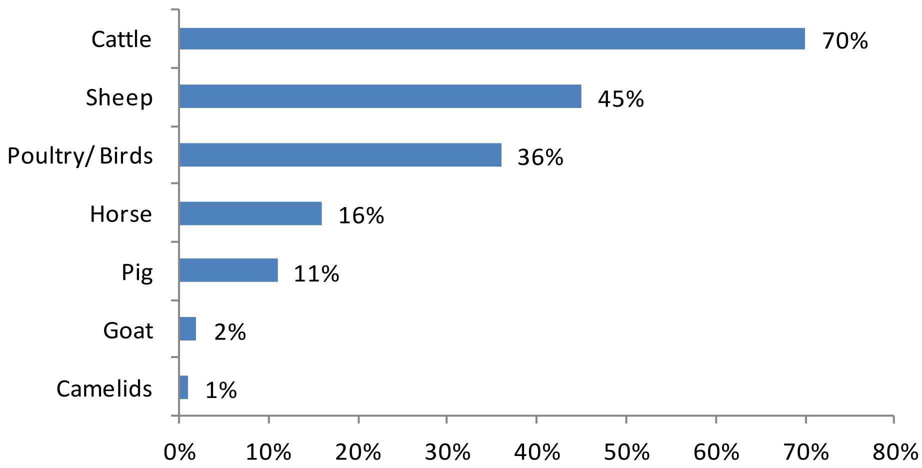
Nearly all respondents (91%) reported that they had access to the internet. Those least likely to have access to the internet (9%) were located in Scotland (17%), Wales (15%), and the North West (13%).

4.2 Animals kept by Livestock Keepers

Types of animals kept

At an overall level, as illustrated below in Figure 4.5, seven in ten respondents kept cattle (70%), between four in ten and five in ten kept sheep (45%), and nearly four in ten (36%) kept poultry or birds. Smaller groups of respondents reported keeping horses (16%), pigs (11%), goats (2%), and/or camelids (1%).

Figure 4.5 Livestock



A3. Which of the following animals do you have on your farm / business or premises? Base: 403 – All respondents (multicode).

At an overall level, a comparison to the profile of animals kept by livestock keepers who participated in the 2012 study revealed several notable differences, including significant increases in the proportions of poultry keepers (up from 14% in 2012, to 31% in 2014[6]) and horse keepers (up from 10% in 2012 to 16% in 2014), and a corresponding decrease in the proportion of cattle keepers surveyed (down from 80% in 2012, to 70% in 2014)[7]. This change in the breakdown of the livestock keeper interviews may further affect any comparability between the 2012 and 2014 data.

Focussing in on the 2014 results, nearly half of all respondents (47%) reported that they kept one type of animal, whilst a third (34%) kept two types of animal.

As could be expected, several regional variations was noted in the type of animals kept. Respondents with cattle were more likely to be located in Scotland (83%) or Wales (83%) than the Midlands (57%) or North East (47%). A similar geographical pattern was discovered for respondents who kept sheep (69% were based in Scotland, and 60% in Wales, compared to only 26% in the Midlands, and 36% in the North East). By contrast, the

[6] The figure of 36% in Figure 4.5 relates to Poultry/Bird keepers. The figure of 31% referred to in the text relates solely to poultry (chicken) keepers, and provides a closer comparison to 2012.

[7] Kadence International (2012), *AHVLA Customer Insight Research*, page 66.

Midlands and North East were more popular amongst respondents who kept poultry and/or birds (48% and 51% respectively), compared to Scotland and Wales (27% and 20% respectively).

Where respondents reported that they kept poultry or birds, they were also asked to identify the numbers of which other types of poultry or bird they kept. The most popular poultry or birds to keep were chickens, which were kept by nearly all (84%) of those who reported keeping poultry or birds. In comparison to the figures provided previously in Figure 4.5, this translates to three in ten (31%) of all respondents.

Smaller numbers of respondents also reported that they kept turkeys (26 respondents), ducks (25 respondents), geese (19 respondents), and/or pheasants (13 respondents). Due to the small base numbers here, it is not possible to offer any further analysis for these groups.

Numbers of animals kept

As outlined below in Table 4.6, the mean number of animals kept varied by the type of animal.

Table 4.6 Mean number of animals kept

Type of animal[8]	Mean number of animals kept	Base (Number of animal keepers)
Poultry/birds	15,831	144
Chickens[9]	13,232	123
Pigs	6,384	42
Sheep	687	181
Cattle	192	280
Horses	8	65

A4. Approximately how many of these animals do you keep in your farm/business when fully stocked? A7. Approximately how many of the following types of birds do you keep in your farm/business when fully stocked? Base: As above – all respondents keeping each type of animal (multicode).

A comparison to the livestock keepers who participated in the 2012 study again revealed several differences in the average number of animals kept. These changes were most pertinent in relation to the mean number of chickens kept (up from 4,437 in 2012 to13,232 in 2014), and the mean number of horses kept (down from 69 in 2012 to 8 in 2014)[10]. It is unclear whether these changes are indicative of wider changes in the populations of chicken and/or horse keepers, or due to differences in sampling between 2012 and 2014.

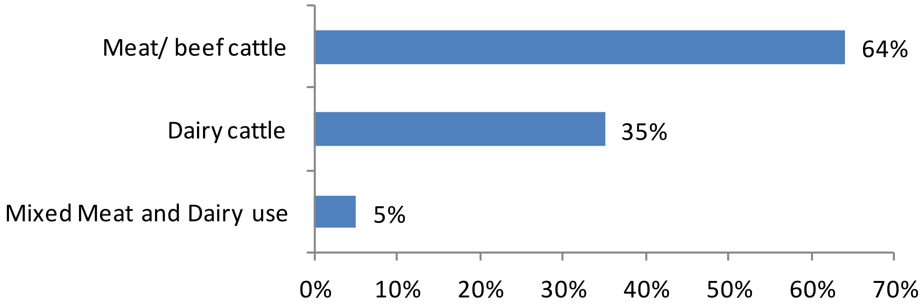
[8] The numbers for respondents who kept the following types of animals are not shown due to the following low base numbers: turkeys (26), ducks (25), geese (19), pheasants (13), goats (8) and camelids (5).

[9] Chickens make up the majority of the poultry/bird group outlined above.

[10] Kadence International (2012), *AHVLA Customer Insight Research*, page 66.

Animal specialisms
Where respondents kept cattle or sheep, they were asked which specific types of these animals they kept most of. As outlined overleaf in Figure 4.7, there was a clear distinction amongst respondents keeping cattle, with nearly two thirds of respondents (64%) specifically keeping meat or beef cattle, and just over a third (35%) keeping dairy cattle.

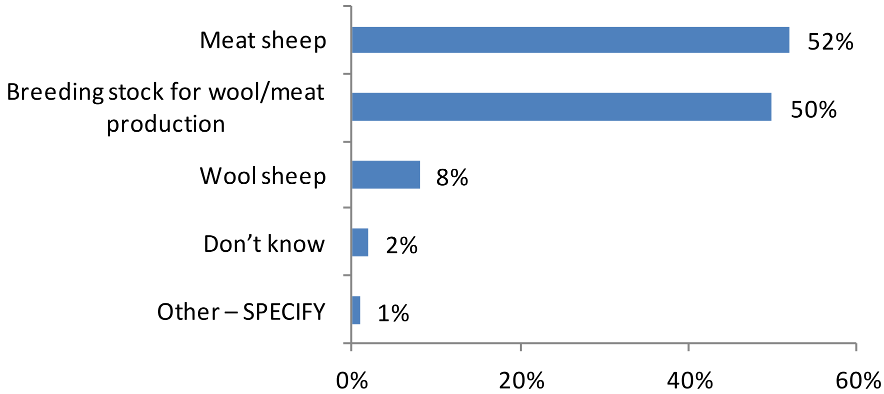
Figure 4.7 Types of Cattle



A5. Which of the following type of cattle do you have most of? Base: All respondents who kept cattle - 281 (multicode).

In contrast, as outlined overleaf in Figure 4.8, the respondents who kept sheep were evenly split between those who kept meat sheep (52%), and those who kept breeding stock for wool or meat production (50%). Nearly one in ten respondents who kept sheep kept wool sheep (8%).

Figure 4.8 Types of Sheep



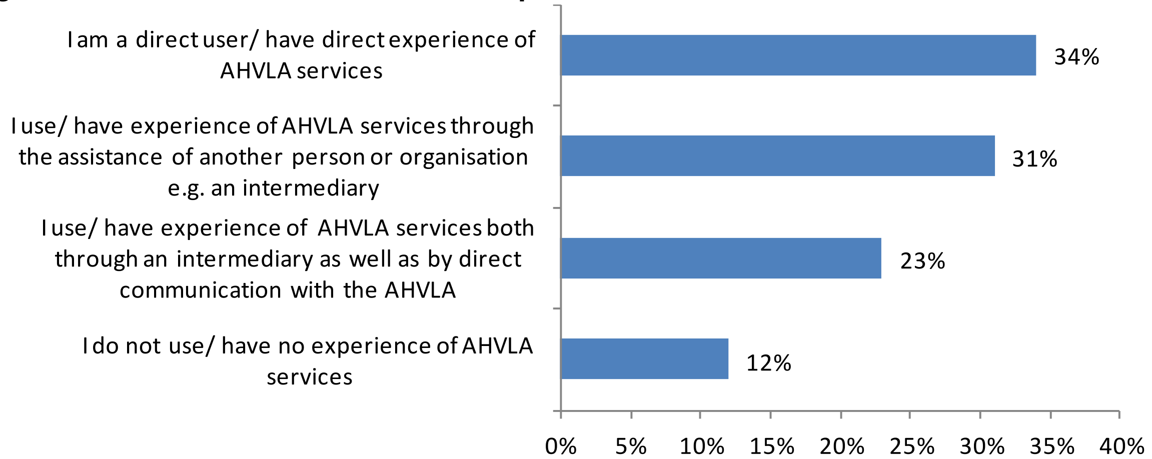
A6. Which of the following type of sheep do you have most of? Base: All respondents who kept sheep - 183 (multicode).

4.3 Relationship with AHVLA

All respondents were asked to what extent they were responsible for dealing, directly or indirectly, with various animal health / environmental agencies or similar organisations. Two thirds of respondents (65%) reported that they took full "responsibility" for dealing with such organisations, whilst the remaining third of respondents (35%) deemed that they took "some responsibility" for this liaison.

Respondents were also asked about the overall nature of their relationship with AHVLA. As illustrated below in Figure 4.9, a third of respondents reported that they were direct service users (34%), and a further third that they used AHVLA services via an intermediary (31%)[11]. Just over two in ten respondents noted that they both used AHVLA services directly and via an intermediary (23%), whilst the remaining twelve per cent reported that they did not use AHVLA services.

Figure 4.9 Overall Nature of Relationship with AHVLA



B3 Which of the following best reflects the overall nature of your relationship with AHVLA? Base: All respondents - 403.

Respondents who were most likely to be direct users (34%) were typically located in the South West, Midlands and North East (49%, 44% and 42% respectively), compared to the North West (22%) and Wales (16%). Those who kept pigs were also more likely to be direct users than respondents who kept cattle or sheep (51% vs. 32% and 33% respectively).

Those using an intermediary (31%) were most likely to be located in the North West (47%, compared to 11% in the South East). In contrast, those in the South East were most likely to report that they used AHVLA services both through an intermediary as well as with direct contact with AHVLA (42%).

Direct and indirect use of specific services is analysed in further detail in Section five.

[11] These figures are in line with the equivalent figures reported in 2012.

5 Awareness of and interaction with AHVLA

Summary

- Respondents perceived that AHVLA was responsible for providing advice and information about animal health and welfare (50%), on farm testing (31%), and prevention and control of diseases and disease outbreak (24%) amongst a range of other issues. These figures compare favourably to those recorded in 2012, and suggest an increasing awareness amongst livestock keepers of AHVLA's responsibilities.
- The frequency of interaction with AHVLA reported by AHVLA service users varied. Half of all service users "rarely" interacted with AHVLA (48%, stating that they were in contact once or twice a year), and a quarter (26%) reported that they were not current service users. Smaller proportions of AHVLA customers accessed services "regularly" (8%, monthly), or "sometimes" (17%, once every two to three months).
- Current AHVLA service users reported using a range of AHVLA services. The service most likely to be used directly was issuing licenses (56%), and the services most likely to be used indirectly were laboratory testing (52%), on farm testing (50%) and animal disease surveillance (47%). These figures represent a change to 2012 with increases in usage reported across several service areas, although it is unclear whether this represents a change in the sample composition, or actual increases in usage since 2012.

This section focuses on respondents' perceptions of what AHVLA is responsible for, and explores the frequency of AHVLA service users' interactions with AHVLA. This section also profiles which services were used by these service users, and whether the services were typically accessed directly, via an intermediary, or a mixture of the two.

As in order to have some knowledge of AHVLA, respondents first needed to be aware of AHVLA and the services it provides, any respondents who reported that they were not aware of AHVLA were screened out of the survey.

5.1 Perceptions of AHVLA Responsibilities

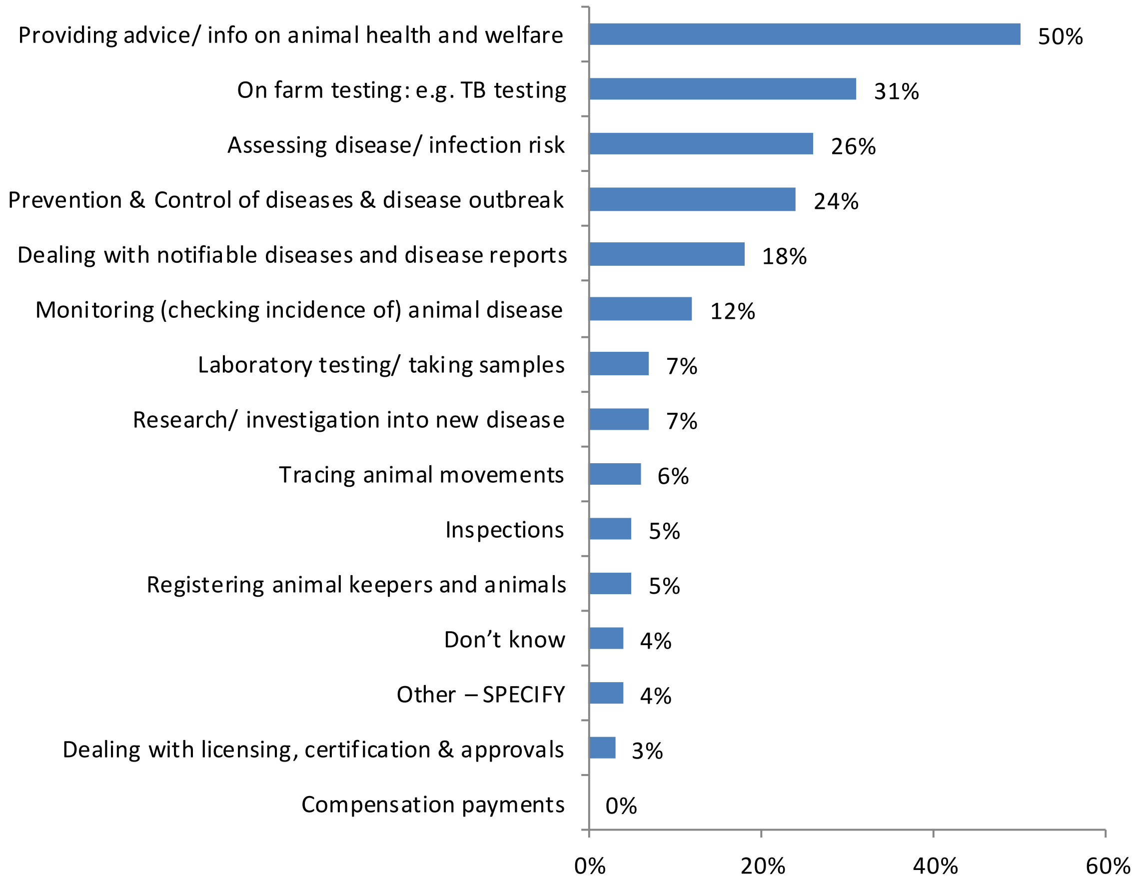
All respondents were asked what they perceived AHVLA to be responsible for. A list of options was not provided, so therefore the responses provided represent spontaneous thoughts from respondents.

As outlined in Figure 5.1 overleaf, a wide variety of responses were received, which covered the main areas defined by AHVLA as areas of responsibility. The main areas of responsibility highlighted by respondents were:

- Providing advice or information on animal health and welfare (50%);
- On farm testing (e.g. TB testing) (31%); and
- Tacking animal disease by assessing disease/infection risk (26%), prevention and control of disease (24%), dealing with notifiable diseases and disease reports (18%), and/or monitoring animal disease (12%).

Fewer than one in ten respondents mentioned other areas such as laboratory testing (7%), research into new diseases (7%), tracing animal movements (6%) and/or inspections (5%).

Figure 5.1 Perceptions of AHVLA Responsibilities



B2 What would you say the Animal Health and Veterinary Laboratories Agency is responsible for? Base: All respondents - 403 (multicode).

These results are broadly in line with those reported in 2012[12], apart from several notable increases, which suggest that livestock keepers may be better informed about areas which AHVLA is responsible for. Specifically, these increases were recorded for:

[12] Kadence International (2012), *AHVLA Customer Insight Research*, page 18.

- Providing advice / information on animal health and welfare (up from 6% in 2012 to 50% in 2014; an eight-fold increase).
- TB testing (up from 16% in 2012 to 31% in 2014[13]), which is particularly pertinent given that a smaller proportion of achieved interviews were completed with cattle keepers in 2014 than in 2012.
- Prevention and control of disease outbreaks (up from 6% in 2012 to 24% in 2014[14]).
- Dealing with notifiable diseases and disease reports (up from 7% in 2012 to 18% in 2014[15]).

Focussing on the 2014 data, several variations were noted by region, and by type of farming, suggesting that AHVLA may be used in different ways by different groups of livestock keepers.

For example, whilst a similar proportion of respondents in all regions perceived that it was AHVLA's responsibility to provide advice or information on animal health and welfare, on farm testing (31%) was more widely cited as one of AHVLA's responsibilities in the South West, Midlands and Wales (42%, 38% and 38% respectively) than it was in the North East or Scotland (16% and 12% respectively). In terms of disease, prevention and control (24%) was more widely cited in the Midlands (29%) than North East or South West England (both 13%), and research and investigation into new diseases (7%) was noted more in North West and South East England (22% and 20% respectively[16]) than any other region (all other regions 4% and below).

In terms of type of farming, horse keepers were most likely to cite providing advice and information on animal health and welfare as an area AHVLA has responsibility for (64%, compared to 48% for cattle keepers and 49% for sheep keepers), and cattle keepers were most likely to focus on farm testing (38%, compared to 28% for sheep keepers, 24% for poultry/bird keepers and 16% for pig keepers).

[13] In 2012, the data grouping referred to "TB Testing/ monitoring".

[14] Please note the slight change in the data grouping since 2012. The 2012 grouping referred to "Controlling diseases / disease outbreaks".

[15] Please note the change in the data grouping since 2012. The 2012 text referred to "Dealing with all animal notifiable diseases".

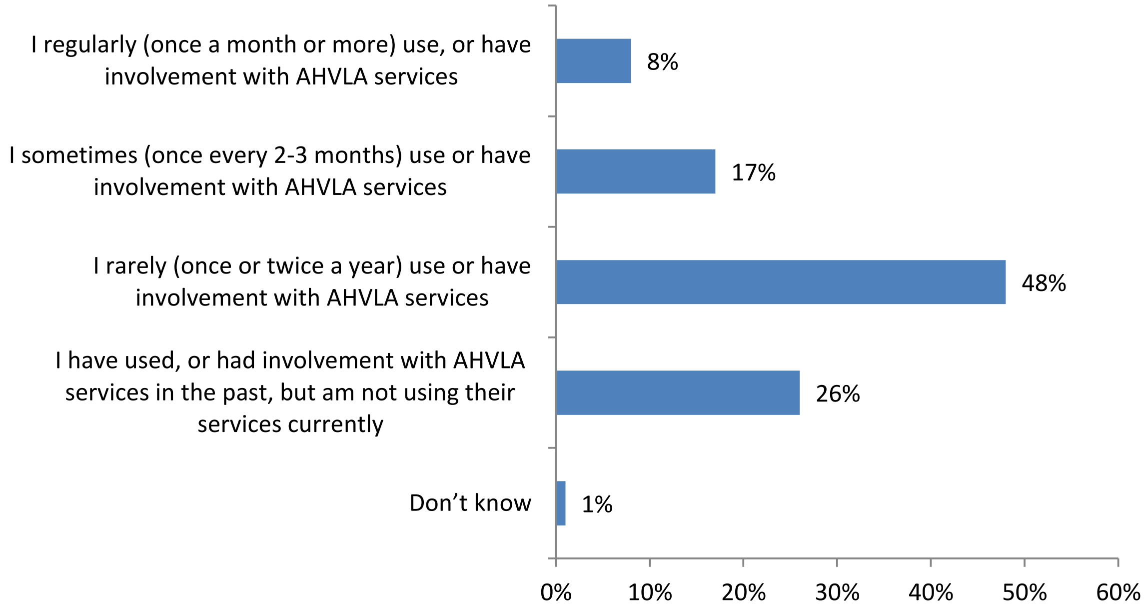
[16] Please note the low base size of 28 for this area.

5.2 Frequency of interactions with AHVLA

After being asked what they thought AHVLA was responsible for, respondents were then asked to describe the overall nature of their relationship with AHVLA. As noted in the respondent profile in Section 4, whilst nearly nine in ten respondents (88%) reported that they interacted with AHVLA directly, via an intermediary, or using a mix of the two, the remaining one in ten respondents (12%) had no experience of using AHVLA services. The rest of this section is therefore only based on the views of those who did have some experience of interacting with AHVLA, described throughout the rest of this report as "AHVLA service users".

AHVLA service users were asked to describe the frequency of their interactions with AHVLA. As illustrated below in Figure 5.2, half of all AHVLA service users reported that they "rarely" had contact with AHVLA, and accessed services only once or twice a year (48%). The remaining service users were evenly split between those who used services more frequently (8% used services "regularly" once a month or more, and 17% used services "sometimes" once every two to three months), and "lapsed users" who had previously used AHVLA services, but were not currently using them (26%).

Figure 5.2 Frequency of Interaction with AHVLA



B4 Which of the following best describes the frequency of your interactions with AHVLA? Base: AHVLA service users – 354.

The profile of AHVLA service users who regularly and sometimes had involvement with AHVLA services recorded in 2014 was in line with the profile reported in 2012. The two key differences noted between 2014 and 2012 were the increase in lapsed users (up from 7% in 2012 to 26% in 2014), and the corresponding decrease in those who rarely had involvement with AHVLA's services (down from 64% to 48%[17]). As noted in the 2012 report, this difference in lapsed users is due to different quotas being agreed for lapsed users in 2012 and 2014[18], and does not reflect the wider population of animal keepers.

Focussing on the 2014 data, due to the low base size of only 28 respondents (8%) who reported that they "regularly" used AHVLA services, the scope for further analysis here is limited. Whilst no significant differences were noted by region, "regular" service users were more likely to keep one type of animal (12%) than more than one type of animal (5%), and/or use AHVLA services directly (16%, compared to 2% who used an intermediary, and 3% who accessed services directly, but also used an intermediary).

AHVLA service users who "sometimes" used AHVLA services (17%) were most likely to be located in South West England (38%, compared to a maximum of 17% for all other regions), keep poultry/birds (24%, compared to 13% of sheep keepers), and/or be direct service users (24%, rather than 10% who used the service via an intermediary).

Those who "rarely" used AHVLA services (48%) tended to be located in Scotland or Wales (63% and 57% respectively), keep cattle and/or sheep (both 53% compared to 41% for poultry/bird keepers), and/or access services both directly and via an intermediary (55%), rather than only accessing them directly (40%).

Lapsed users (26%) were more likely to be located in the North West (44%) or North East (40%), and access AHVLA services via an intermediary (37%, compared to 18% who accessed AHVLA services directly).

For the purposes of this report, those who regularly, sometimes or rarely used AHVLA services are known as "current AHVLA service users".

5.3 AHVLA Services used

Current AHVLA service users were asked to review a list of eight AHVLA services[19] and state whether they used them directly, indirectly, or had no experience of using them.

As illustrated overleaf in Figure 5.3, the services which respondents reported the most experience of were on farm testing of animals (used directly by more than three in ten current service users (35%), and indirectly by five in ten current service users (50%)), advice

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[17] Kadence International (2012), *AHVLA Customer Insight Research*, page25.

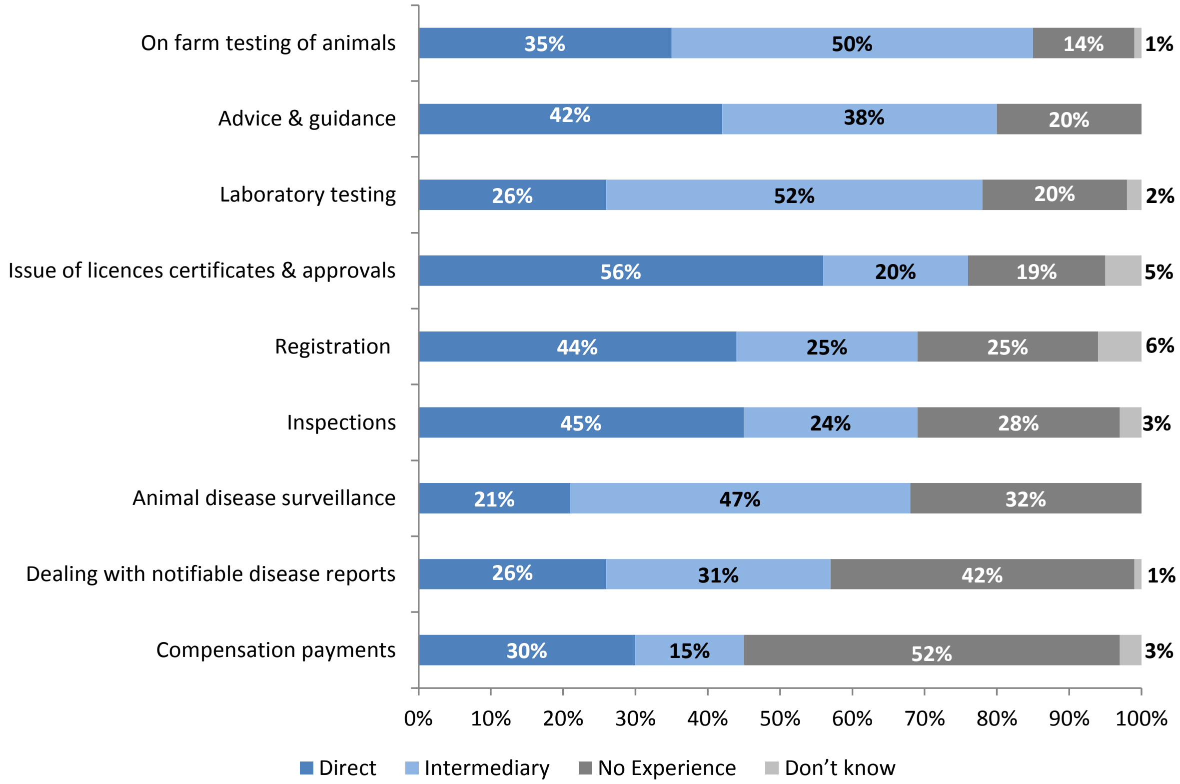
[18] The 2012 questionnaire suggests that a 5% quota was placed on lapsed users, whereas in 2014, no quotas were agreed for lapsed users.

[19] Cattle keepers were also asked about a ninth service – Compensation payments.

and guidance (used directly by four in ten current service users (42%) and indirectly by a similar proportion (38%)), and laboratory testing (used directly by 26%, and indirectly by 52% of current service users).

The service most likely to be used directly was issuing licenses (56%), and the services most likely to be used indirectly were laboratory testing (52%), on farm testing (50%) and animal disease surveillance (47%).

Figure 5.3 Use of AHVLA Services



B5. In which of the following areas do you have any experience of dealing (liaising/ interacting) with AHVLA? For each area please can you let me know if contact is either directly made with AHVLA or whether this is completed through an intermediary? Base: current AHVLA service users – 262. (Only cattle keepers were asked about compensation payments – the base here is 190).

Where comparisons with 2012 were possible[20], several increases in the overall level of service usage were noted:

- Advice and guidance; up from 67% in 2012 to 80% in 2014[21].

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[20] Kadence International (2012), *AHVLA Customer Insight Research*, page27.

[21] Referred to as "providing guidance and information on animal health and welfare" in 2012.

- Laboratory testing; up from 55% in 2012 to 78% in 2014.
- Compensation payments; up from 34% in 2012 to 45% in 2014.
- Registration; up from 60% in 2012 to 68% in 2014.

It is unclear whether these increases noted between 2012 and 2014 were a result of an actual increase in the number or proportion of livestock keepers accessing AHVLA's services, or due to differences between the 2012 and 2014 respondents.

6 Satisfaction with AHVLA Services

Summary

- Current AHVLA service users rated satisfaction with AHVLA services as relatively consistent across all service areas. AHVLA's laboratory testing service received the highest satisfaction rating (8.1), and AHVLA's compensation payments service received the lowest satisfaction rating (7.0). There were no significant differences in satisfaction mean scores by whether specific services were used directly, or via an intermediary, or agent.
- Satisfaction with AHVLA's written communication was rated at 7.2 by AHVLA service users overall. One in five AHVLA service users (18%) reported dissatisfaction with AHVLA's written communications.
- Current AHVLA service users rated the importance of all customer service factors very highly, whilst satisfaction with these customer service factors was more muted, and satisfaction scores for all areas were significantly lower than the deemed importance of the area.
- The largest disparities between satisfaction and importance related to the time taken to respond to queries or issues (where 13% of AHVLA service users were dissatisfied), and the quality of resolution to queries or issues (where 12% of AHVLA service users were dissatisfied).
- The relationship between customer service factors, satisfaction with AHVLA processes and overall satisfaction with AHVLA is explored further in Section 7 using Key Driver Analysis.

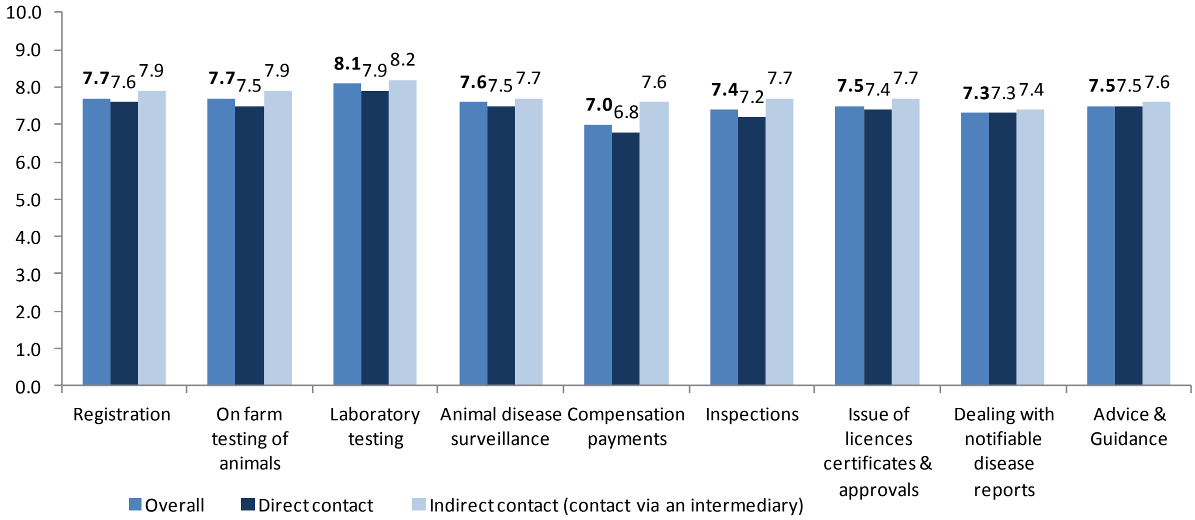
This section focuses on two main areas; firstly satisfaction with specific AHVLA services, and secondly perceptions of customer service factors relating to interacting with AHVLA on a more general basis.

6.1 Satisfaction with AHVLA Services

Satisfaction with AHVLA Services

All current AHVLA service users who reported that they had experience of one of the nine specific AHVLA service areas (either directly, or via an intermediary) were asked to rate their satisfaction with the processes in this service area. Whilst all satisfaction scores were relatively consistent across all service areas, as outlined overleaf in Figure 6.1, satisfaction with laboratory testing (8.1) was notably higher than satisfaction with compensation payments (7.0).

Figure 6.1 Satisfaction with AHVLA services (mean score)



C1. Overall, how satisfied are you with this/these processes? Please could you give me a satisfaction rating of between 1 and 10, where 1 is not at all satisfied, and 10 is extremely satisfied? Base: current AHVLA service users who use each service either directly or via an intermediary – 28 -147. (*please note the low base for current service users who accessed compensation payments via an intermediary).*

Figure 6.1 also illustrates the relevant satisfaction scores for each service area depending on whether it was accessed directly, or via an intermediary. Although the results for those who accessed services via an intermediary appear higher than those who accessed services directly, no significant differences were noted between these groups across these services. This suggests that service standards, and/or expectations were comparable between these two groups.

At an overall level, satisfaction mean scores were compared to the 2012 scores to see if there had been any change in satisfaction. Where a comparison was possible[22], only one significant change in satisfaction was detected, as satisfaction with registration had decreased from 8.3 in 2012 to 7.7 in 2014.

This data is also outlined overleaf in Figure 6.2, which shows satisfaction with AHVLA services by the points of the satisfaction scale.

Figure 6.2 helps to highlight the areas of highest and lowest satisfaction at an overall level. One example of this is the lower levels of satisfaction, and higher levels of dissatisfaction recorded in relation to compensation payments. Given the nature of compensation payments, it is perhaps unsurprising that one in twelve (8%) livestock keepers who had needed to access AHVLA's compensation service reported that they were very dissatisfied, and a slightly larger proportion (9%) reported that they were dissatisfied.

Due to the low base size of 15 current AHVLA service users who reported their dissatisfaction with compensation payments, it is not possible to profile this group further.

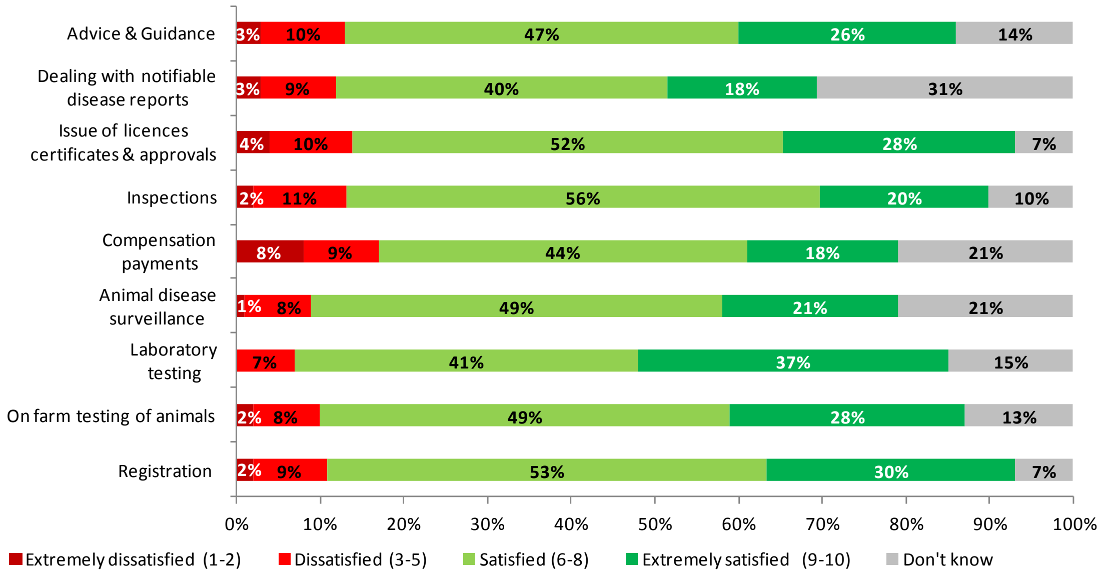
[22] As the following areas were new additions to the questionnaire in 2014, no trend data is available: on farm testing, inspections and animal disease surveillance.

Two verbatim comments were received relating to perceived improvements for AHVLA's compensation service[23]. As outlined below, these comments focus on understanding the parameters of the compensation service provided:

- *"The TB testing could be made a lot more thorough. The test said my animals had TB when in fact they haven't. They were killed without compensation even when they tested negative."* ***Cattle and Sheep Keeper in the South West***

- *"They could pay some more compensation and do more TB prevention consultancy on the farm."* ***Cattle, Poultry and Horse Keeper in Wales***

Figure 6.2 Satisfaction with AHVLA services (satisfaction scale)



C1. Overall, how satisfied are you with this/these processes? Please could you give me a satisfaction rating of between 1 and 10, where 1 is not at all satisfied, and 10 is extremely satisfied? Base: current AHVLA service users who use each service – 85 – 224.

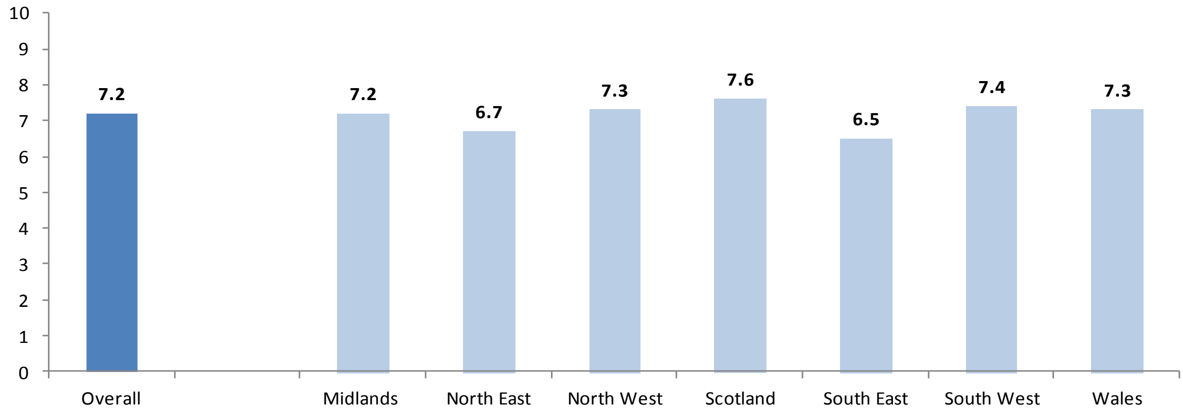
Figure 6.2 also highlights areas of high satisfaction, such as the almost two in five current AHVLA service users (37%) who were very satisfied with the laboratory testing service. There were no significant differences amongst current service users who were very satisfied with the laboratory testing service, suggesting service provision was consistent across different groups of livestock keepers.

Satisfaction with Written Communications

All AHVLA service users (including lapsed service users) were asked to rate their satisfaction with AHVLA's written communication over the past 12 months. At an overall level, satisfaction with AHVLA's written communications received a mean score of 7.2, as illustrated overleaf in Figure 6.3.

[23] Improvements to AHVLA services are discussed further in Section 7.

Figure 6.3 Satisfaction with written communications (mean score)

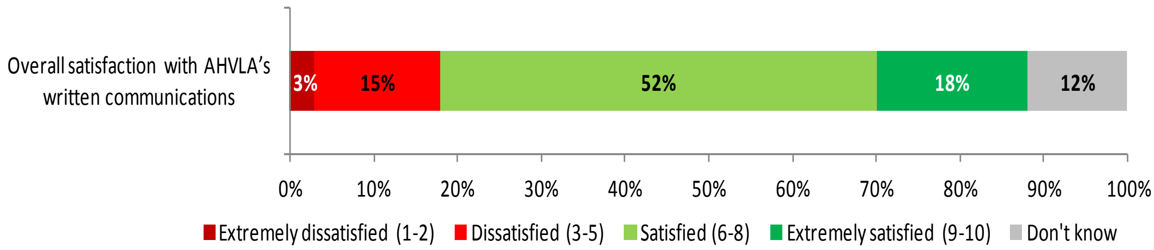


D4. Thinking about the last 12 months, how satisfied overall are you with AHVLA's written communications (paper/email)? Please answer based on a scale of 1-10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: AHVLA service users – 354.

Figure 6.3 also shows the variation in satisfaction with written communications by region. AHVLA service users in Scotland (7.6) were significantly more likely to be satisfied with AHVLA's written communications than those located in the North East (6.7) and South East (6.5).

Figure 6.4 below displays this satisfaction across the points of the satisfaction scale. Here, it is possible to see that whilst one in five AHVLA service users (18%) reported that they were extremely satisfied with AHVLA's written communication, a further one in five (18%) reported dissatisfaction.

Figure 6.4 Satisfaction with written communications (satisfaction scale)



D4. Thinking about the last 12 months, how satisfied overall are you with AHVLA's written communications (paper/email)? Please answer based on a scale of 1-10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: AHVLA service users – 354.

In line with the regional findings shown in Figure 6.3, those most likely to be dissatisfied with AHVLA's written communications (18%) tended to be based in the North East and South East (30% and 25%, compared to Wales (10%)).

6.2 Perceptions of interacting with AHVLA

Importance of customer service factors

All current AHVLA service users were asked to rate the importance of several customer service factors when dealing with AHVLA. It is interesting to note the strength of the ratings provided in relation to these nine customer service factors; as outlined overleaf in Figure 6.5, all factors were deemed very important to current AHVLA service users.

In ORC International's experience across a wide range of other customer studies, high ratings across multiple attributes can often occur when respondents are asked to state the importance of different service components in isolation. In other words, when given the opportunity to do so, respondents typically rate many areas as very important where they have not been asked to rank attributes in relation to one another or consider any element of trade-off.[24]

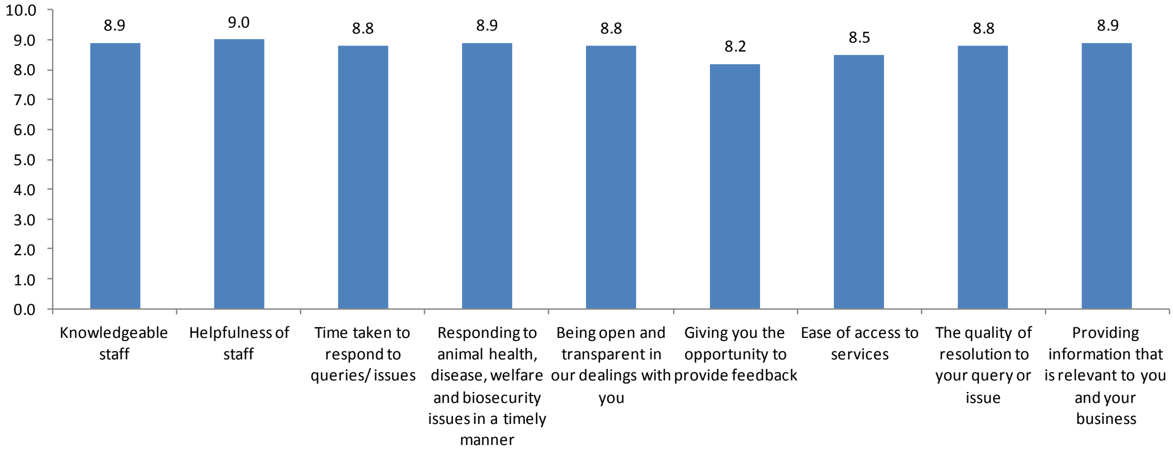
A further reason for high ratings across multiple areas can be because respondents may be concerned that by rating a service area as less important, it may be reduced or discontinued by the agency whilst still of value to the customer.

With this in mind, whilst an analysis of the importance of different customer service factors from the customer perspective is offered below, ORC International recommend that a clearer and more accurate assessment of the importance of different service attributes can be found in section 7, where we explore Key Driver Analysis results. Rather than asking respondents to clearly state the importance of several attributes, Key Driver Analysis works to statistically derive the most important attributes (in this case) which are associated with overall satisfaction with AHVLA.

As outlined overleaf in Figure 6.5, AHVLA service users perceived the most important customer service attributes to be the helpfulness of staff (9.0), knowledgeable staff and providing information that is relevant to you and your business (both 8.9).

[24] In this particular research, stated importance was used (as opposed to tanked importance) in order to retain the ability to compare 2014 data to trend data collected in 2012. Respondents were not asked to rank areas of importance within this survey as it can prove challenging for people to recall and accurately rank a long list over the telephone. Respondents typically find this type of exercise much easier when they can see a list and have time to consider different options and service packages against one another.

Figure 6.5 Importance of factors when dealing with AHVLA (mean score)

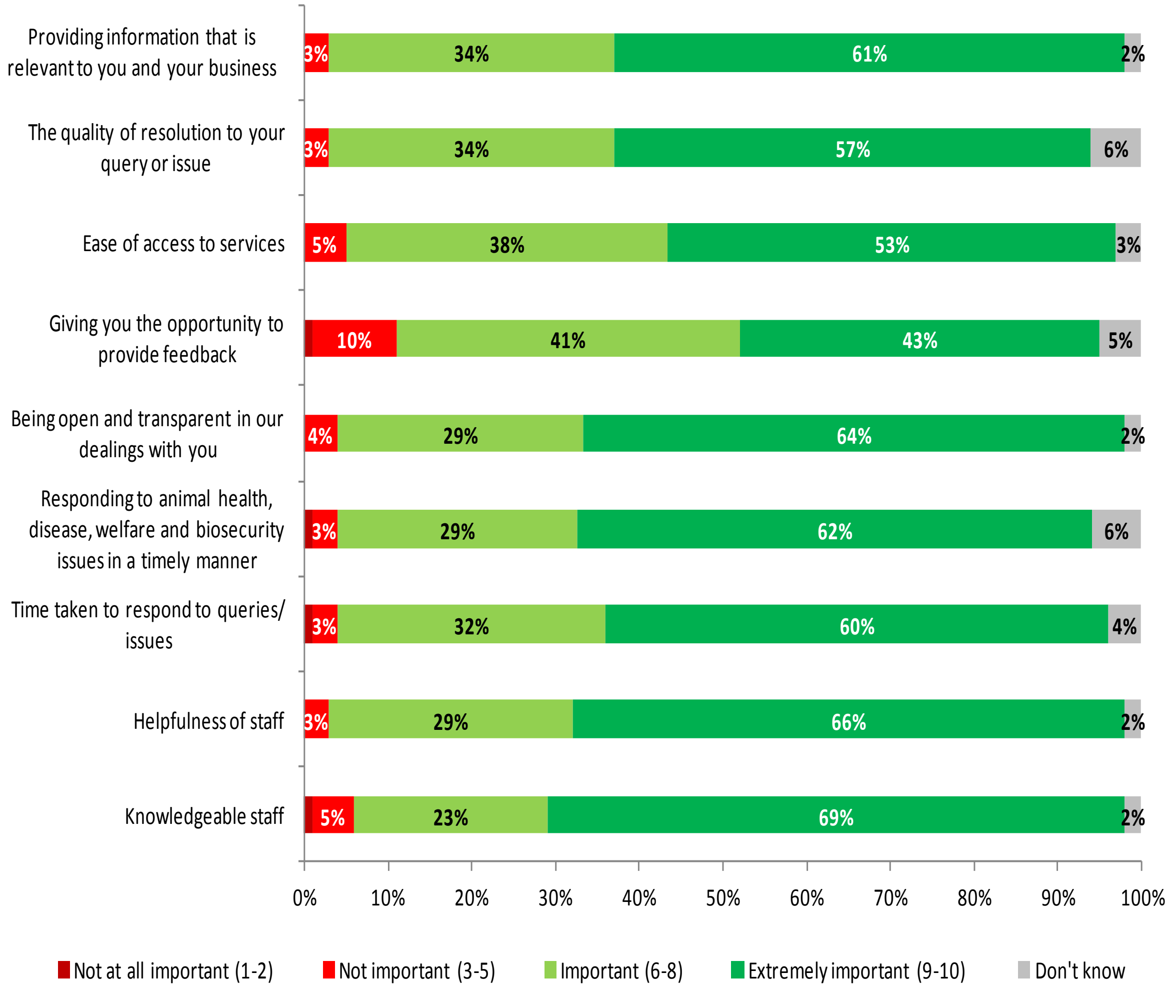


C2 . In general how important is each of the following factors to you when dealing with AHVLA? Please answer based on a scale of 1-10 where 1 means 'not at all important' and 10 means 'extremely important'. Base: Current AHVLA service users – 262.

The customer service factor deemed to be of the least importance was "giving you the opportunity to provide feedback", which received a mean score of 8.2; significantly lower than all other factors. As outlined in Figure 6.6. although more than one in ten current AHVLA service users (11%) rated being given the opportunity to provide feedback as not at all important or not important, as this group only includes 28 individual respondents no further profiling is possible.

Figure 6.6 overleaf illustrates these scores on a satisfaction scale.

Figure 6.6 Importance of factors when dealing with AHVLA (satisfaction scale)

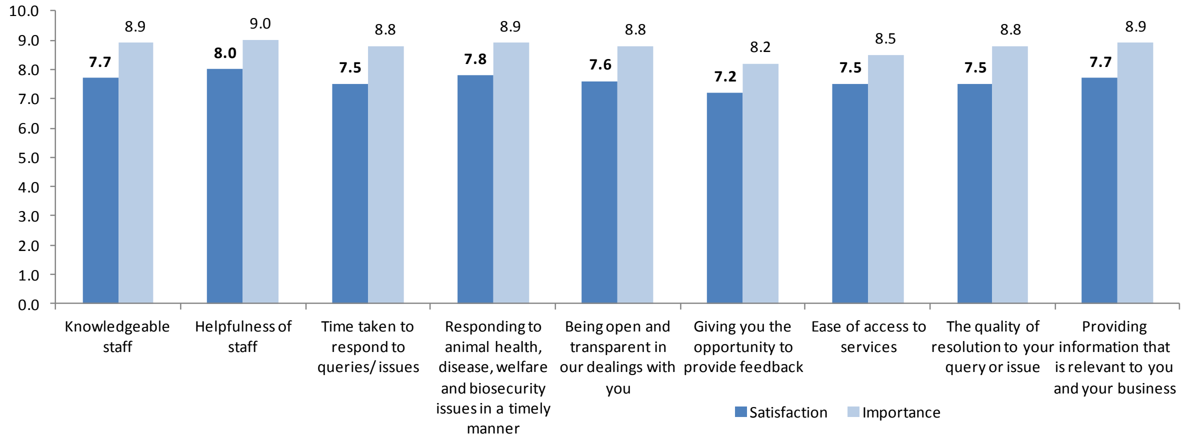


C2 . In general how important is each of the following factors to you when dealing with AHVLA? Please answer based on a scale of 1-10 where 1 means 'not at all important' and 10 means 'extremely important'. Base: Current AHVLA service users – 262.

Satisfaction with customer service factors

Once current AHVLA service users had rated the importance of customer service factors when dealing with AHVLA, they were asked to rate their satisfaction with AHVLA's performance against each of the customer service factors. These satisfaction ratings are illustrated overleaf in Figure 6.7, alongside the importance ratings to provide a comparison.

Figure 6.7 Satisfaction with factors when dealing with AHVLA (mean score)



C3 . And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? Please answer based on a scale of 1-10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: Current AHVLA service users – 262.

As outlined above, current service users typically rated satisfaction with each customer service factor as significantly lower than the importance placed on the same factor. This is partially a reflection of the importance placed on all customer service attributes by current AHVLA service users, but also suggests that improvements to these customer service factors would be welcomed.

Potential areas for improvement are illustrated overleaf in Figure 6.8, which sets out satisfaction with customer service attributes on a satisfaction scale.

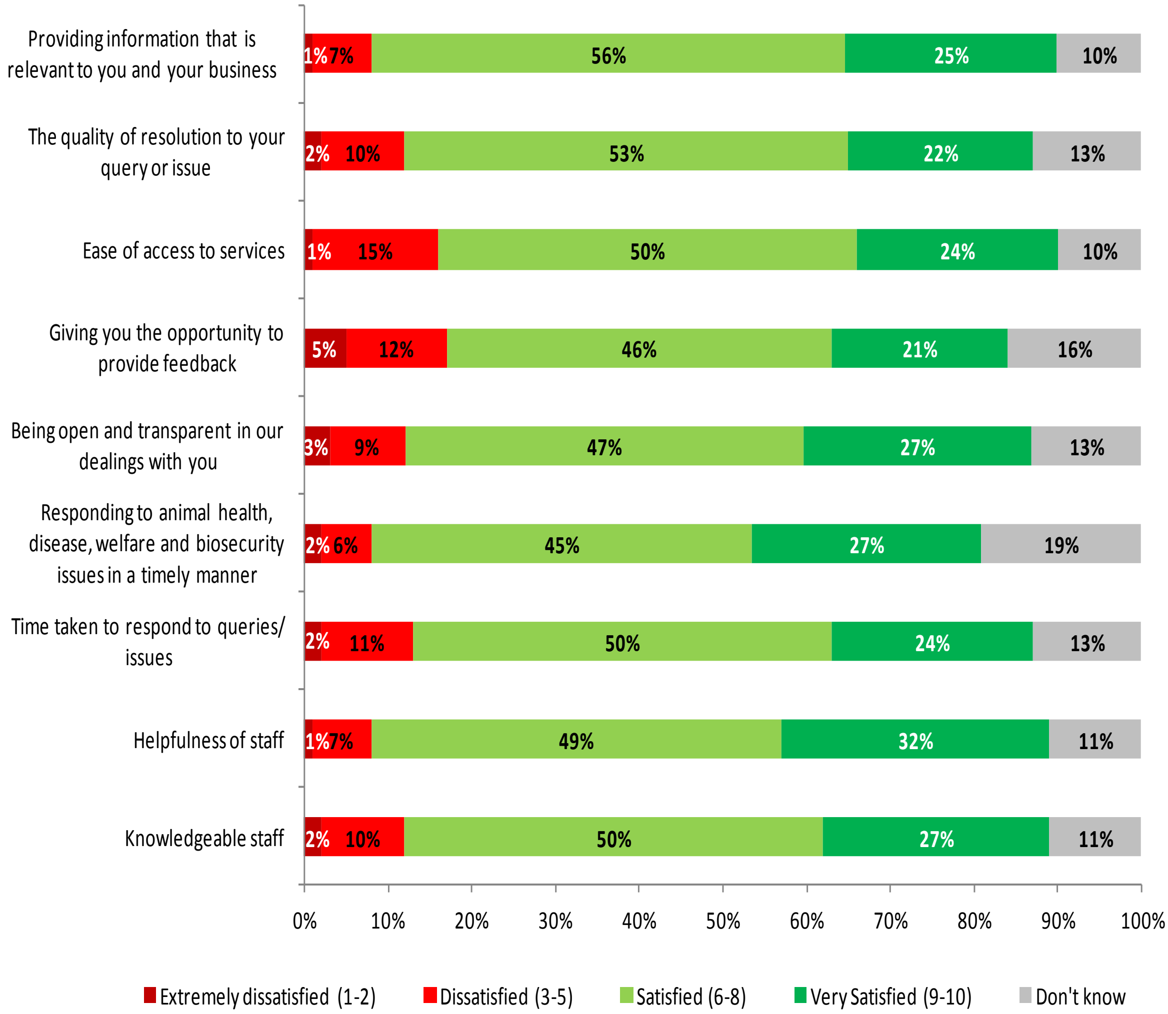
One of the largest disparities between satisfaction and importance related to the time taken to respond to queries or issues (satisfaction rated as 7.5, importance rated as 8.8; a difference of 1.3). Figure 6.8 shows that one in eight current AHVLA service users (13%) was dissatisfied with this area. Those who reported dissatisfaction with the time taken to respond to queries or issues were most likely to be located in the South East (27%, compared to only 3% in Scotland), pig keepers (32%), direct AHVLA service users (19%, compared to those who accessed services via an intermediary, or agent, 8%), and those aged under 45 (20%).

A further disparity between satisfaction and importance was noted in relation to quality of resolution to a customer's query or issue. As reported in relation to the time taken to respond to queries or issues, satisfaction with the quality of resolution to a customer query was rated as 7.5, whilst importance was rated an average of 1.3 points higher at 8.8.

As illustrated in Figure 6.8, more than one in ten current AHVLA service users (12%) reported dissatisfaction with the quality of resolution to their query or issue. These current service users were most likely to be located in the South East (17%, compared to 3% in Scotland), keep pigs (24%, compared to cattle (9%), sheep (7%), or those who kept two or more types of animals (7%)), be direct service users (19%), and aged 45 – 64 (15%, compared to 4% aged 65+).

Due to these two similar profiles of respondents, it appears that the quality of query resolution, and the time taken to respond to queries or issues may be related. This would suggest that any improvement actions to be taken forward in this area by AHVLA should consider the query resolution process as a whole.

Figure 6.8 Satisfaction with factors when dealing with AHVLA (satisfaction scale)



C3 . And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? Please answer based on a scale of 1-10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: Current AHVLA service users – 262.

7 Overall Satisfaction with AHVLA Services

Summary

- Overall satisfaction with AHVLA was rated as 7.4. This is in line with the overall satisfaction score reported in 2012, although these scores are not directly comparable due to differences in sampling, and question scales between the 2012 and 2014.
- Overall satisfaction with AHVLA (74%) was also found to be in line with overall satisfaction for business to business customer groups, as recorded on ORC International's Government Departments and Agencies benchmarking database (also 74%).
- In order to further understand overall satisfaction with AHVLA, Key Driver Analysis was completed to assess the correlation between overall satisfaction with AHVLA and satisfaction with different AHVLA processes, written communications, and different customer service factors.
- Areas of strength for AHVLA include AHVLA staff and information, which is the top key driver of overall satisfaction with AHVLA, and an area where AHVLA is performing well. This is further supported by the verbatim comments relating to satisfaction with providing a good service (7%), and being helpful and knowledgeable (5% and 4% respectively).
- Areas where AHVLA should look to improve are query resolution and written communications, which are the second and third key drivers (respectively) of overall satisfaction with AHVLA. Query resolution and written communications were also prevalent in both the verbatims comments of dissatisfied customers, and to a lesser extent, areas where all AHVLA service users requested improvements (communicate and respond to issues quickly (5%), and newsletters (3%)). Due to the strength of association between these areas and overall satisfaction with AHVLA, we would expect any improvements in these areas to also increase overall satisfaction with AHVLA.

This section summarises AHVLA service users' overall thoughts on their satisfaction with AHVLA. Results are presented and explored via Key Driver Analysis, and the analysis of open comments provided by AHVLA service users.

7.1 Overall satisfaction with AHVLA

Overall satisfaction

All AHVLA service users were asked to rate their overall satisfaction with the service received from AHVLA. A mean score of 7.4 was achieved, which is in line with the overall satisfaction mean score for livestock keepers reported by Kadence in 2012[25].

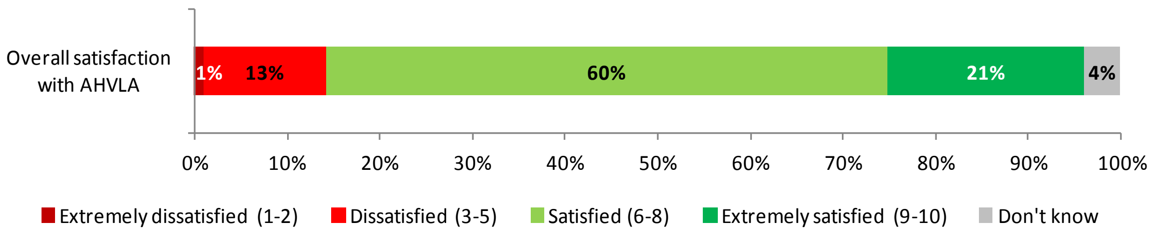
Figure 7.1 below illustrates how overall satisfaction differed by region. AHVLA service users located in Scotland (7.8), the North West (7.6) and Wales (7.6) were significantly more satisfied than AHVLA service users located in the North East (6.6) and the South East (6.9).

Figure 7.1 Overall Satisfaction with AHVLA (by mean score and region)

E1. Please provide a rating for your overall satisfaction with the service you receive from AHVLA on a scale from 1 to 10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: AHVLA service users – 354.

Figure 7.2 outlines this data in a different way, by showing how satisfaction varied across different points of the satisfaction scale.

Figure 7.2 Overall Satisfaction with AHVLA (by satisfaction score)



E1. Please provide a rating for your overall satisfaction with the service you receive from AHVLA on a scale from 1 to 10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: AHVLA service users – 354.

[25] Kadence International (2012), *AHVLA Customer Insight Research*, page 39. Please note that due to differences in sampling and question scales, these results are not directly comparable.

At an overall level, four in five AHVLA service users (81%) stated that they were either very or fairly satisfied with the service they received from AHVLA, and one in seven (15%) that they were very or fairly dissatisfied.

AHVLA's most satisfied service users (21% very satisfied) were typically located in Scotland, the Midlands and Wales (30%, 27% and 25% respectively), and/or livestock keepers aged over 65 years old (30%, compared to 14% for livestock keepers aged under 45 years).

In contrast, dissatisfied AHVLA service users (15% dissatisfied) tended to be located in the North East (25% dissatisfied) and/or keep one type of animal (19% dissatisfied , compared to 11% who kept two or more types of animals). These service users were also more likely to access AHVLA's services via an intermediary (20%, compared to 9% who accessed services both directly, and via an intermediary), and/or not currently be using AHVLA's services (18% of lapsed users were dissatisfied, compared to 7% of those who reported more frequent contact with AHVLA every two to three months).

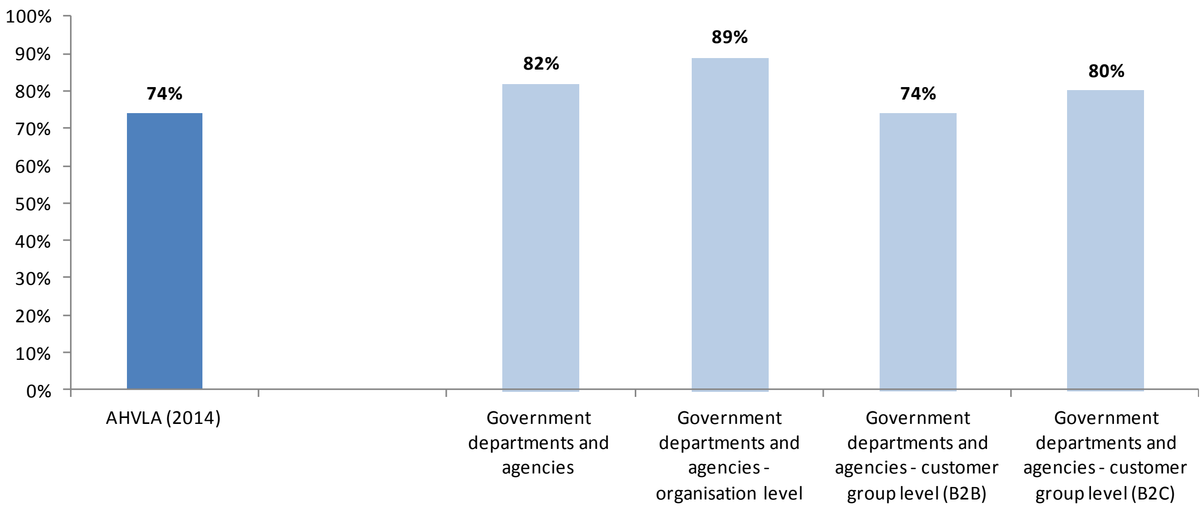
Specific reasons for dissatisfaction are explored via an exploration of verbatim comments later on in this section.

Benchmarking satisfaction

In order to benchmark satisfaction with AHVLA against ORC International's Government Departments and Agencies benchmarking database, the raw data for overall satisfaction with AHVLA was re-coded into a five point scale, excluding don't know. The top two points of this scale (mapping back to points 7, 8, 9 and 10 on AHVLA's ten point satisfaction scale) were then combined to provide a NET satisfied percentage of 74%.

Figure 7.3 below sets out a comparison between this figure for AHVLA, and the relevant benchmarking norms.

Figure 7.3 Benchmarking norms comparison



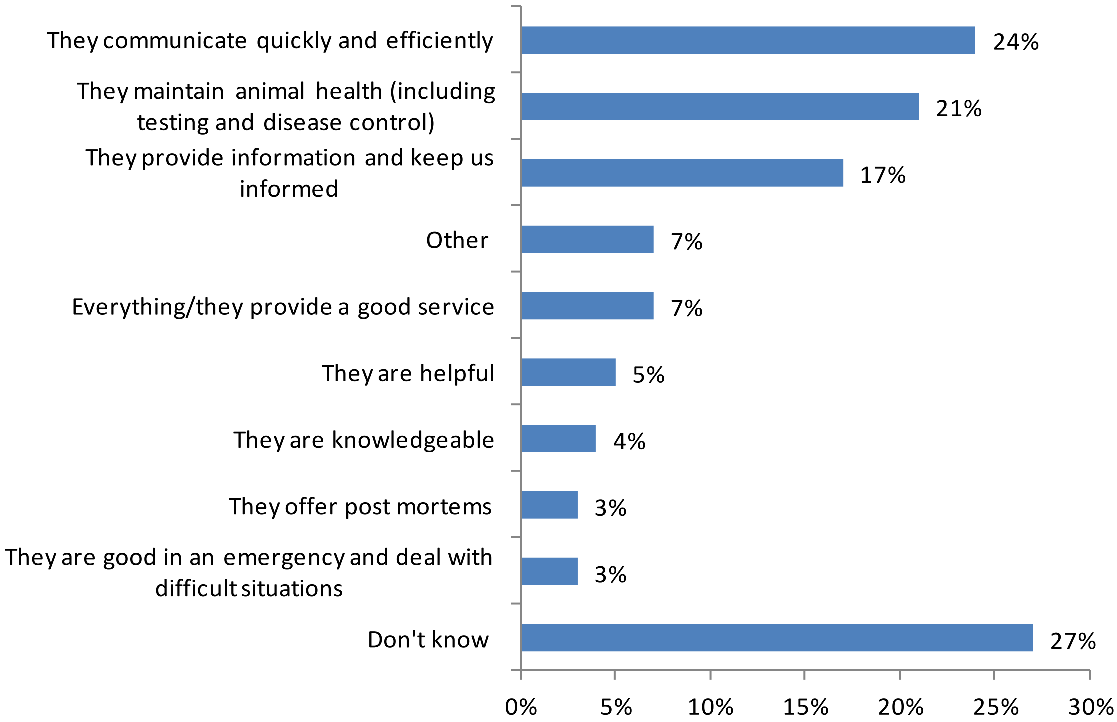
E1. Please provide a rating for your overall satisfaction with the service you receive from AHVLA on a scale from 1 to 10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'. Base: AHVLA service users, *excluding don't know – 339. Comparison with overall satisfaction as recorded on ORC International's Government Departments and Agencies benchmarking database.*

As illustrated in Figure 7.3, overall satisfaction with AHVLA is in line with overall satisfaction recorded for Government Departments and Agencies at customer group level for business to business customers (both 74%). These benchmarking comparisons can be used as the basis for further discussion at AHVLA, with the potential that one of the higher benchmarks such as overall satisfaction recorded for Government Departments and Agencies at customer group level for business to consumer customers (80%) could be used as a stretch target for AHVLA.

Areas of Strength for AHVLA

All AHVLA service users who rated their satisfaction with AHVLA as nine or ten on a scale of one to ten were asked what AHVLA does well. As illustrated overleaf in Figure 7.4, where very satisfied service users were able to explain what AHVLA does well, positive feedback was recorded for quick and efficient communications (24%), maintaining animal health (21%), and providing information and keeping customers informed (17%).

Figure 7.4 Areas of Strength for AHVLA



E3. What is it that AHVLA does well? Base: AHVLA service users who provided a score of nine or ten out of ten to rate their overall satisfaction with AHVLA – 75.

In line with Figure 7.4, as outlined below, specific examples of positive comments recorded from service users typically related to strong communication, timely updates, and speedy query resolution:

- *"They communicated well. When TB broke out, they acted on the query very quickly"* ***Cattle keeper in the South West***

- *"They are very good at contacting you and letting you know what's going on".* ***Cattle and Sheep keeper in the Midlands***

- *"They are professional, prompt and answer queries quickly."* ***Cattle keeper in the Midlands***

7.2 Areas for improvement

Reasons for dissatisfaction with AHVLA

AHVLA service users who rated their overall satisfaction with AHVLA as four or below on a scale of one to ten were asked to outline the main reasons why they were dissatisfied with the service from AHVLA. Positively, only ten AHVLA service users rated their overall satisfaction with AHVLA as four or below, and were required to answer this question.

Five of these ten comments related to dissatisfaction with specific issues service users had experienced in dealing with AHVLA, often relating to unresolved queries, and written communication, as illustrated below:

- *"We don't get the answer that we want. The result of the post mortem wasn't accurate. We don't know enough information and the service they provide to farmers."* ***Pig keeper in the South East***

- *"AHVLA are too vigorous in applying criteria for application for a breeder licence".* ***Pig keeper in the North East***

- *"Because we have an outstanding bill and I don't believe they did anything."* ***Poultry/bird keeper in the North East***

- *"Level of transparency. An application of common sense might be good."* ***Poultry/bird keeper in the South East***

- *"Just general paperwork"* ***Sheep and Poultry/bird keeper in the North West***

Other comments related to the changing landscape of animal health, and being able to access information elsewhere :

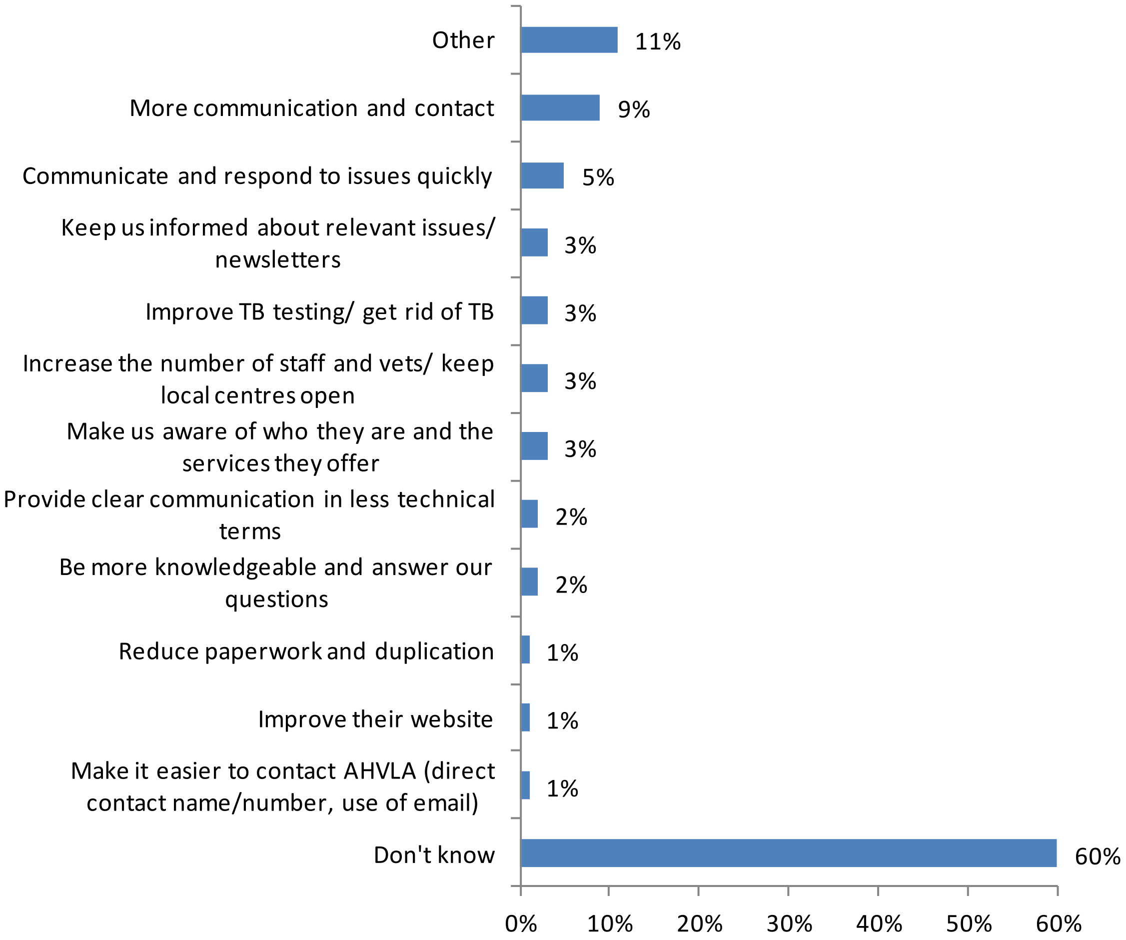
- *"Because they are cutting the animal health places. I think it is really wrong because you have fewer sites. [If you want] post mortems done there are fewer places to go."* ***Cattle and poultry/bird keeper in the North East***

- *"They are irrelevant. I can get the information elsewhere."* ***Cattle, sheep and horse keeper in Scotland***

Areas for improvement

All AHVLA service users were asked which one thing AHVLA could do to improve its service. As outlined overleaf in Figure 7.5, positively three in five service users (60%) could not pin point any improvements they wanted AHVLA to make. Where service users were able to suggest improvements, these centred around increased communication and contact from AHVLA (9%), and ensuring communication and a speedy response to any issues (5%).

Figure 7.5 Areas for improvement



E4. What one thing could AHVLA do to improve its service? Base: AHVLA service users – 354.

7.3 Key Driver Analysis

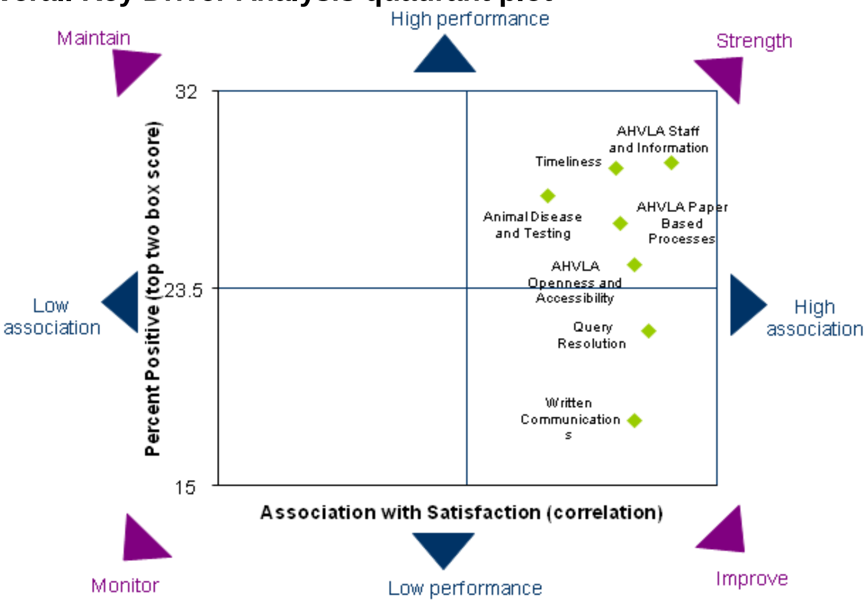
In order to further understand overall satisfaction with AHVLA, Key Driver Analysis was completed to assess the correlation between overall satisfaction with AHVLA (the dependent variable), and other independent variables, including satisfaction with different AHVLA processes, AHVLA's written communications, and different customer service factors (explored earlier in section 6).

Key Driver Analysis is a statistical approach to identifying the factors most strongly linked to overall satisfaction, and hence which aspects should be targeted for improvement. Broadly, the independent variables outlined above were grouped into seven "factors", which each related to different areas of AHVLA's processes and customer service. Correlation analysis was then undertaken to identify which of these factors had the highest association with overall satisfaction with AHVLA. Further detail on the methodology for this Key Driver Analysis, and the factor groupings is available in Appendix 1.

The Key Driver Analysis was based on the views of two specific groups of AHVLA customers: those who reported that they were a direct user, or had direct experience of AHVLA services, and those who reported that they had experience of AHVLA services both through an intermediary as well as by direct communication with AHVLA. Those who had accessed AHVLA services solely through an intermediary were excluded from this analysis, as it was unclear whether they would be able to differentiate sufficiently between the performance of AHVLA and the performance of their intermediary.

As outlined below in Figure 7.6, the results of this Key Driver Analysis show that all seven factors identified have a high association with overall satisfaction with AHVLA, as they are all located on the right hand side of the quadrant plot. It is positive news for AHVLA that of these seven factors, five are located in the "strengths" quadrant (as they are high performing, and have a high association with overall satisfaction), and only two factors are located in the "improve" quadrant (as they are lower performing, but have a high association with overall satisfaction).

Figure 7.6 Overall Key Driver Analysis quadrant plot



Focussing now on the top three key drivers:

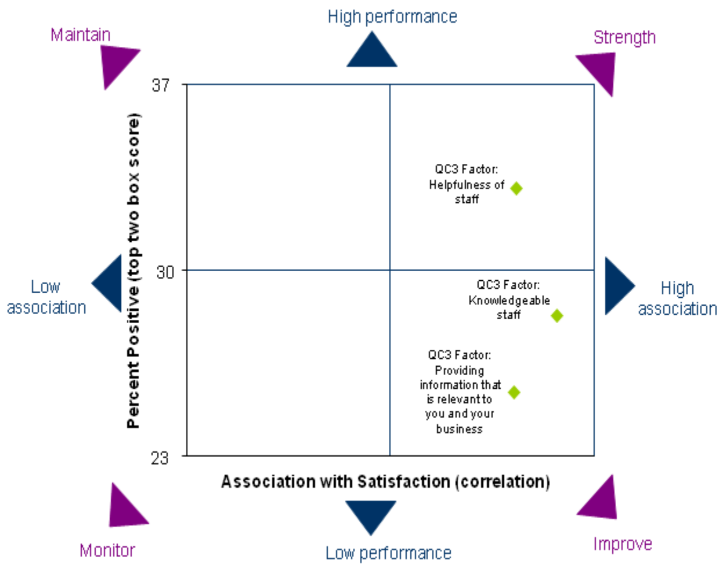
1. AHVLA Staff and Information

AHVLA staff and information is the top key driver, and an area where AHVLA is performing well. AHVLA's positive performance in this area, especially relating to the helpfulness of staff, should be celebrated and shared with AHVLA staff.

A further model for this area, outlined overleaf in Figure 7.7, shows that the individual questions within this area relate to helpfulness of staff (which is a strength for AHVLA), and knowledgeable staff and providing information that is relevant to you and your business, both of which are areas for improvement for AHVLA.

Whilst overall, AHVLA staff and information is a strength for AHVLA, due to the strength of the association between this factor and overall satisfaction with AHVLA, we would expect any improvements in staff knowledge, and/or AHVLA providing information that is relevant to farm businesses to also increase overall satisfaction with AHVLA.

Figure 7.7 AHVLA staff and information Key Driver Analysis quadrant plot



2. Query resolution

Query resolution is the second key driver, and an area where AHVLA should look to improve. Due to the strength of the association between query resolution and overall satisfaction with AHVLA, we would expect any improvements in query resolution to also increase overall satisfaction with AHVLA.

Query resolution was a standalone factor in the Key Driver Analysis, and was not part of a wider factor grouping, therefore no quadrant plot diagram is available. Further information on the factor groupings is available in Appendix A.

As noted in Section 6, key customer groups to focus on in terms of dissatisfaction with query resolution were pig keepers, those located in the South East, and direct service users.

3. Written communications

Written communications is the third key driver, and a further area where AHVLA should look to improve. As noted with query resolution, given the clear association between written communications and overall satisfaction with AHVLA, we would recommend that any efforts in improving written communications will also lead to an increase in overall satisfaction with AHVLA.

As with query resolution, written communications was a standalone factor, and not part of a wider factor grouping.

As noted in Section 6, one in five AHVLA service users (18%) reported dissatisfaction with AHVLA's written communications. AHVLA's most dissatisfied customers were typically located in the North East and South East (30% and 25% respectively).

8 Overall Perception of AHVLA

Summary

- Perceptions of AHVLA were mixed, with AHVLA service users more likely to agree that AHVLA is an organisation that they can trust (7.8), as opposed to being an organisation they hear good things about (6.6), or an organisation that understands their business needs (6.7). Whilst the positive perceptions of trust represent a strong endorsement of AHVLA as an organisation, it is concerning that three in ten AHVLA service users actively disagreed that AHVLA is an organisation they hear good things about, and or that AHVLA understand their business needs.

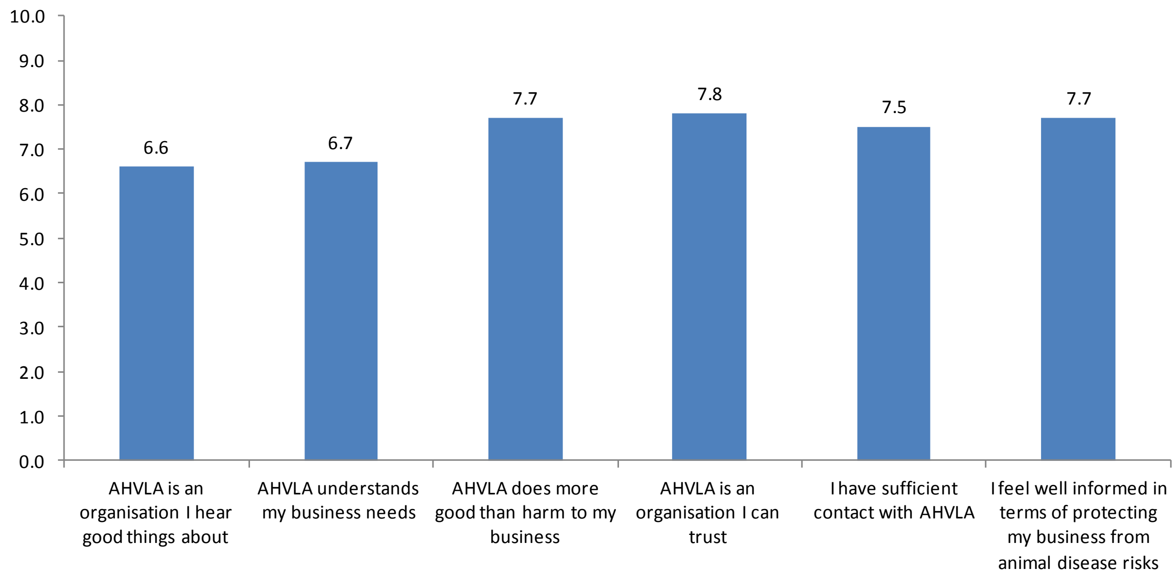
- Advocacy was strong, as four in five users of AHVLA's advice service (78%) would recommend the advice service to other farmers, and a similar proportion of AHVLA's general service users (81%) would speak well of AHVLA's services to other farmers.

This section focuses on the perceptions of AHVLA service users of AHVLA, both in terms of their thoughts on AHVLA as an organisation, and whether they would recommend or speak well of AHVLA to other farmers or livestock keepers.

8.1 Perceptions of AHVLA

All AHVLA service users were asked about their perceptions of AHVLA as an organisation. As outlined below in Figure 8.1, AHVLA service users were more likely to be positive about AHVLA as "an organisation I can trust" (7.8), than an organisation that they had sufficient contact with (7.5), an organisation that understands their business needs (6.7), and/or an organisation they hear good things about (6.6).

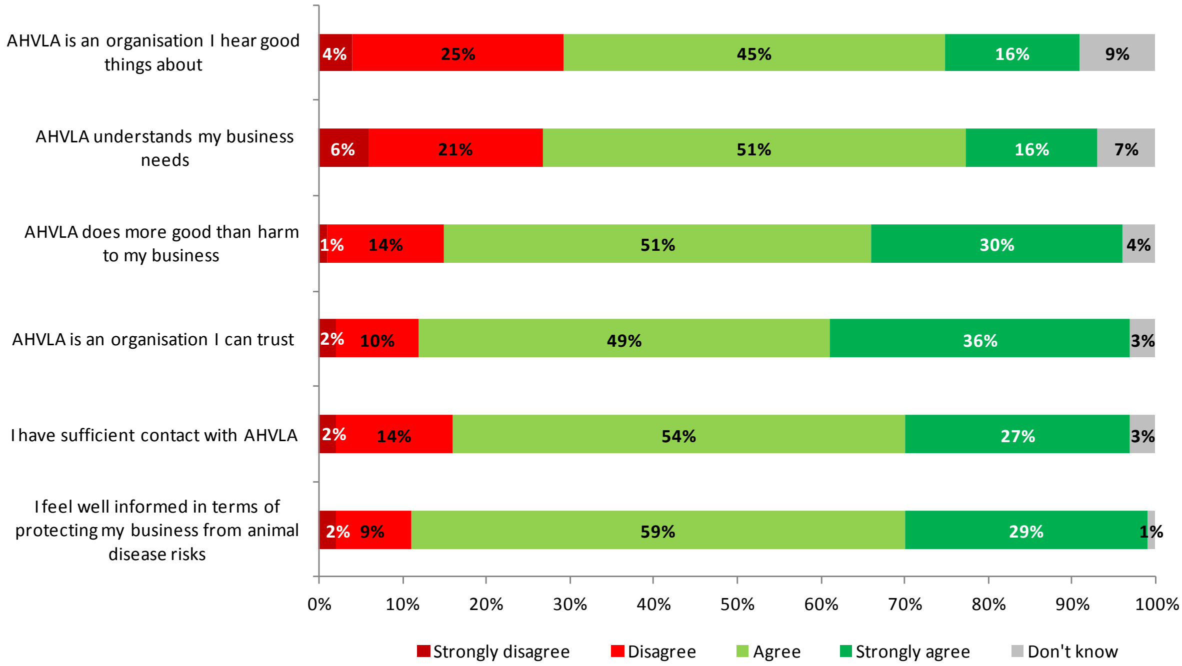
Figure 8.1 Perceptions of AHVLA (Mean Score)



F1. To what extent do you agree / disagree with the following statements? Please score on a scale of 1 to 10 where 1 is strongly disagree and 10 is strongly agree. Base: AHVLA service users – 354.

Figure 8.2 below also shows perceptions of AHVLA across the satisfaction scale.

Figure 8.2 Perceptions of AHVLA (Satisfaction Scale)



F1. To what extent do you agree / disagree with the following statements? Please score on a scale of 1 to 10 where 1 is strongly disagree and 10 is strongly agree. Base: AHVLA service users – 354.

Areas for AHVLA to improve were being an organisation service users hear good things about, where three in ten (29%) AHVLA service users were in disagreement, and understanding business need, where nearly three in ten (27%) AHVLA service users were in disagreement.

Those who were most likely to disagree that AHVLA was an organisation they hear good things about (29%) tended to be located in the South East or North East (43% and 38%, compared to Scotland, 15%), pig keepers (44%), and those aged under 45, or 45 – 64 (36% and31% respectively, compared to 18% for AHVLA service users aged 65+).

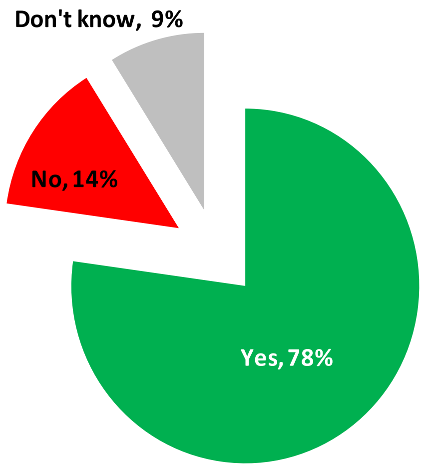
Those who were most likely to disagree that AHVLA understands their business needs (26%) were most likely to be located in the South East (45%, compared to 11% in Scotland, and 22% in the Midlands) pig keepers (41%) and hobby farmers (47%, compared to 23% for livestock farmers).

8.2 Advocacy

AHVLA's Advice service

AHVLA service users who reported that they had used AHVLA's advice services were asked whether they would recommend AHVLA's advice service to other farmers[26]. As outlined below in Figure 8.3, nearly four in five AHVLA service users who had used the advice service would recommend the advice service to other farmers (78%). One in seven (14%) AHVLA service users who had used the advice service would not recommend it to other farmers.

Figure 8.3 Views on recommending AHVLA's advice service to other farmers



F2a. Would you recommend AHVLA's advice service to other farmers? Base: Users of AHVLA's advice service – 209.

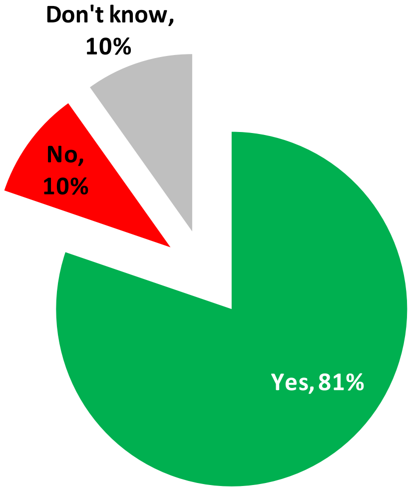
No significant differences were noted in relation to views on recommending AHVLA's advice service to other farmers, suggesting that AHVLA's advice service is provided in a consistent manner across all livestock keepers.

AHVLA's Services in general

All AHVLA service users who had used AHVLA's general services were asked whether they would speak well of AHVLA's services to other farmers. As illustrated overleaf by Figure 8.4. whilst eight in ten (81%) general service users would speak well of AHVLA's general services to other farmers, one in ten (10%) would not, and the remaining one in ten (10%) were unsure.

[26] "AHVLA's advice service" encompasses all advice provided by AHVLA to livestock keepers on a day to day basis.

Figure 8.4 Views on speaking well of AHVLA's general services to other farmers



F2b. Would you speak well of AHVLA's services to other farmers? Base: Users of AHVLA's general services – 261.

Those who were least likely to speak well of AHVLA's general services to other farmers (10%[27]) were more likely to be located in the South West (21%, compared to 5% in Scotland, and 6% in Wales) and keep one type of animal (13%, compared to 5% for sheep keepers).

[27] Caution should be applied when analysing these findings, due to the low base of 25 respondents who reported that they would not speak well of AHVLA's advice services to other farmers.

9 Sources of Information and Advice

Summary

- Most livestock keepers reported using two (61%), or three or more (37%) sources of information and/or advice on animal health and welfare related issues. The most popular single source of advice was private veterinary surgeons (83%). One in ten respondents (10%) reported normally seeking information from AHVLA.

- Half of all respondents (49%) reported that they had not visited a government website in the last 12 months to obtain information and/ or advice on animal health and welfare related issues. Where websites had been visited, the Defra and Gov.UK websites were more popular than the AHVLA website (40%, 29% and 14% respectively across respondents).

- Preferences for routine correspondence were dominated by post (54%) and email (33%). In an emergency, preferred communications channels were telephone (69%), email (15%), and SMS text message (8%).

- Eight in ten respondents (80%) reported having used the internet, whilst only two in ten respondents (20%) used Facebook, and one in ten respondents (9%) used Twitter.

- Frequent internet users tended to be located in the Midlands (60%) and South East (64%), and use AHVLA services directly (53%), or used some services directly, and others via an intermediary or agent (59%). These respondents were also most likely to be aged either under 45 (67%), or 45 – 64 (54%), compared to those aged 65+ (21%).

This section focuses on where livestock keepers normally seek advice, reasons for visiting the AHVLA website, communications preferences, and usage of the internet and online social media like Facebook and Twitter.

9.1 Sources of information and advice

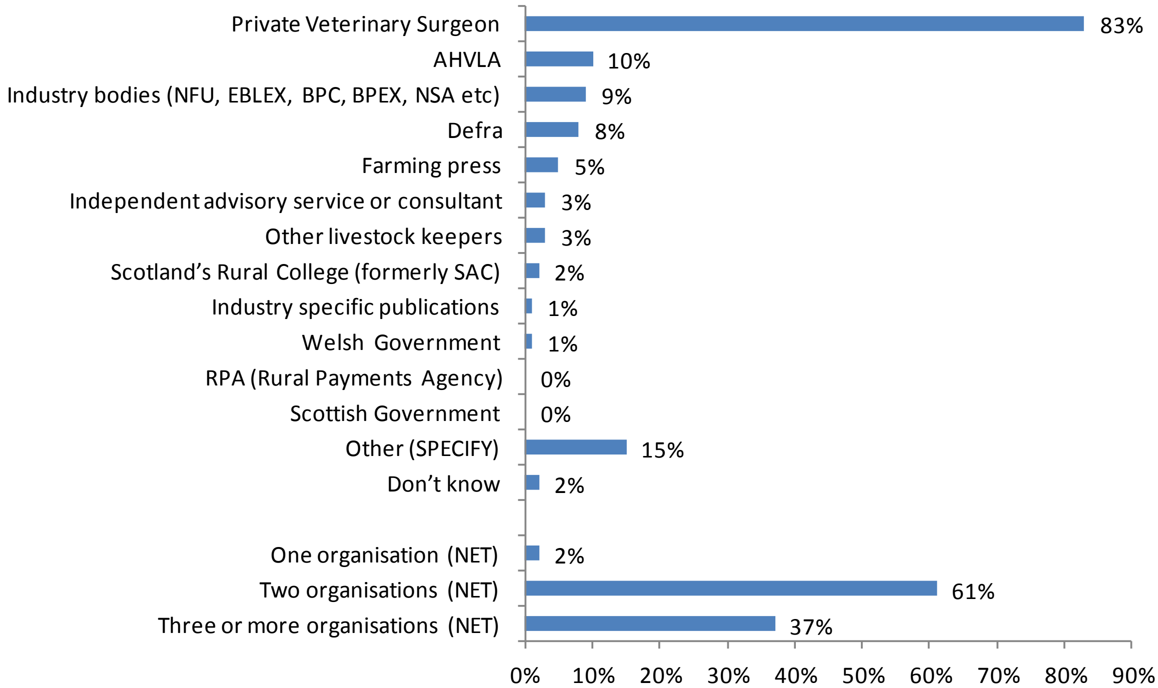
General sources

All respondents were asked from which organisations they normally sought advice and/or information on animal health and welfare related issues. As illustrated overleaf, in Figure 9.1, more than four in five animal keepers (83%) normally sought advice from their private veterinary surgeon. Other sources of advice and/or information included AHVLA (10%), industry bodies like the NFU (9%), Defra (8%), and the farming press (5%).

The proportion of respondents who reported normally seeking information from AHVLA has decreased markedly since 2012 (down from 45%[28] in 2012 to 10% in 2014).This could be explained by a slight change in the question between 2012 (when AHVLA was part of a read out list), and 2014, when respondents were not prompted by a read out list. As noted previously, the differences in the profiles of respondents between 2012 and 2014 mean that caution should be used when comparing results between 2012 and 2014.

Looking at the NET scores (also outlined below in Figure 9.1), it is interesting to note that very few livestock keepers (2%) only had one source of information and/or advice. It was much more common for livestock keepers to use either two, or three or more sources of information and/or advice (61% and 37% respectively).

Figure 9.1 Sources of information and/or advice on animal health and welfare related issues



D1 Firstly from which organisations do you normally seek information and/ or advice on animal health advice and welfare related issues? Base: All respondents – 403.

Those who reported normally seeking information and/or advice from AHVLA (10%) were more likely to be located in the South East, Wales, South West or Midlands (20%, 14%, 13% and 13% respectively, compared to Scotland (2%), and the North West (0%)), and/or keep pigs and or horses (21% and 18% respectively),.

As could be expected, those who reported seeking advice and/or information from AHVLA (10%) were also more likely to be direct service users (15%, compared to those who used an intermediary (6%), or had not accessed AHVLA's services (2%)), and be current service users (15% sometimes, 12% rarely) rather than lapsed users (2%).

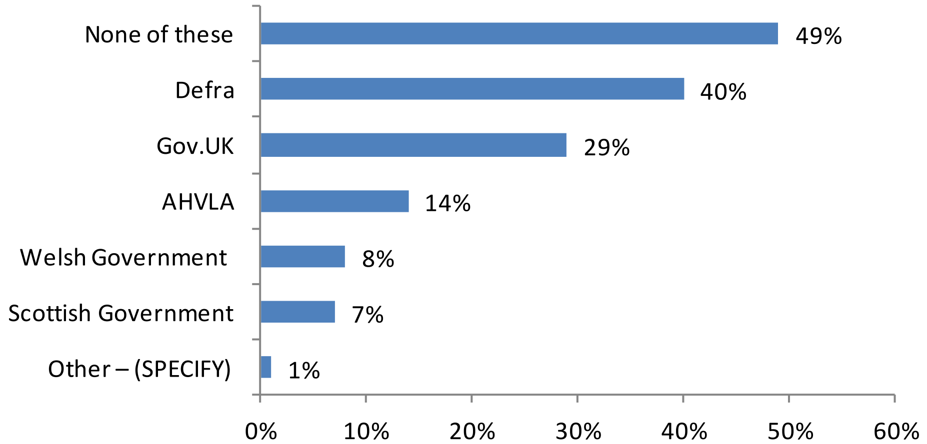
[28] Kadence International (2012), *AHVLA Customer Insight Research*, page 48.

Websites
All respondents were also asked whether they had visited any of a list of websites in the last 12 months to obtain information and/or advice on animal health and welfare related issues. As outlined below, half of all respondents (49%) had not visited any of the websites listed in the last 12 months.

Focussing in on those who had visited websites, four in ten (40%) of all respondents had visited the Defra website, three in ten (29%) the Gov.UK website, and just over one in ten (14%) the AHVLA website.

The proportion of visitors to the AHVLA website represents a significant decrease since 2012, when 22%[29] of livestock keepers reported having visited the AHVLA website. Again, this slight, but significant change could be due to a change in the question wording; in 2012, respondents were asked whether they visited any of the following websites, whilst in 2014, the wording was more prescriptive, and asked about websites visited in the last 12 months for information and/or advice on animal health and welfare related issues.

Figure 9.2 Websites visited for advice on animal health and welfare related issues



D2 Have you visited any of the following websites in the last 12 months in order to obtain information and/ or advice on animal health advice and welfare related issues? Base: All respondents – 403.

Those who had visited the AHVLA website (14%) tended to be located in the South East or Midlands (24% and 20%), keep pigs (28%), be current service users (19% direct, 12% via an intermediary, 15% both), and/or have more frequent interactions with AHVLA (16% sometimes and 15% rarely, compared to 5% of lapsed users).

9.2 AHVLA's website

Respondents who visited AHVLA's website were asked for the main reason for their visit. As outlined overleaf in Figure 9.3, the main reasons for visits were to read guidance on managing TB (29%), guidance on keeping animals (23%), learn more about the work of AHVLA (23%), and/or to read information about livestock diseases (21%).

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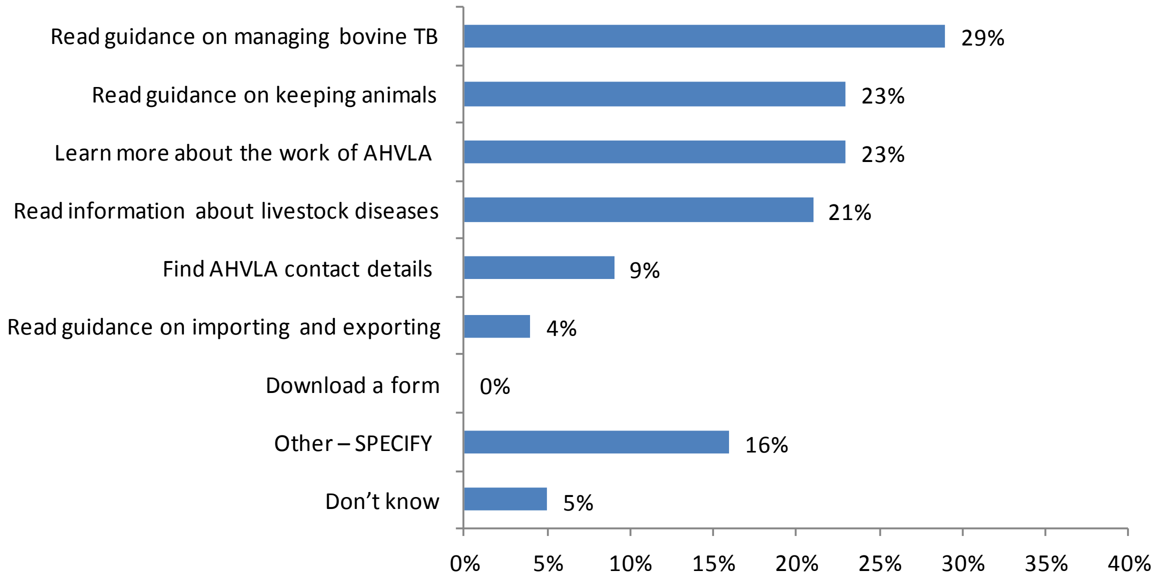
[29] Kadence International (2012), *AHVLA Customer Insight Research*, page 59.

Figure 9.3 Main reasons for visiting the AHVLA website



D3. What were the main reasons for visiting the AHVLA website? Base: All respondents who had visited the AHVLA website in the last 12 months – 56.

9.3 Future communications preferences

All respondents were asked how they would like AHVLA to communicate with them for routine correspondence, and in an emergency. As outlined overleaf in Figure 9.4, preferences for routine correspondence were dominated by post (54%), and email (33%). In contrast, in an emergency, preferred contact channels were telephone (69%), email (15%), and SMS text message (8%).

Although these figures are not directly comparable to those reported in 2012, due to changes in the sample construction, the following significant differences were identified:

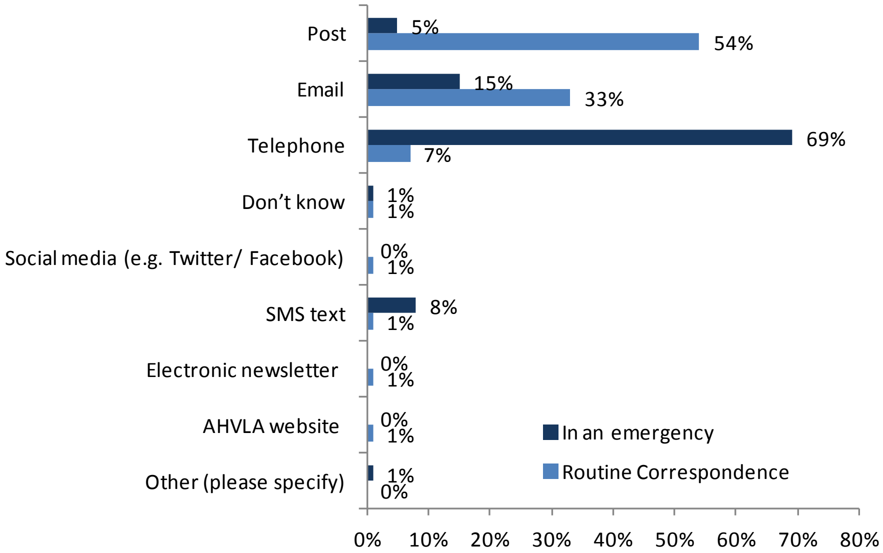
- There has been an increase in the proportion of respondents requesting communication by email for routine correspondence (up from 23% in 2012 to 33% in 2014), and a corresponding decrease in respondents requesting telephone communication for routine correspondence (down from 25% in 2012 to 7% in 2014)[30].

- There has been a decrease in requests for emergency communication via telephone (down from 79% in 2012[31], to 69% in 2014). Despite this decrease, emergency communication via telephone remained the preferred option for the majority of respondents.

30 Kadence International (2012), *AHVLA Customer Insight Research*, page 45.

31 Kadence International (2012), *AHVLA Customer Insight Research*, page 45.

Figure 9.4 Future communications preferences



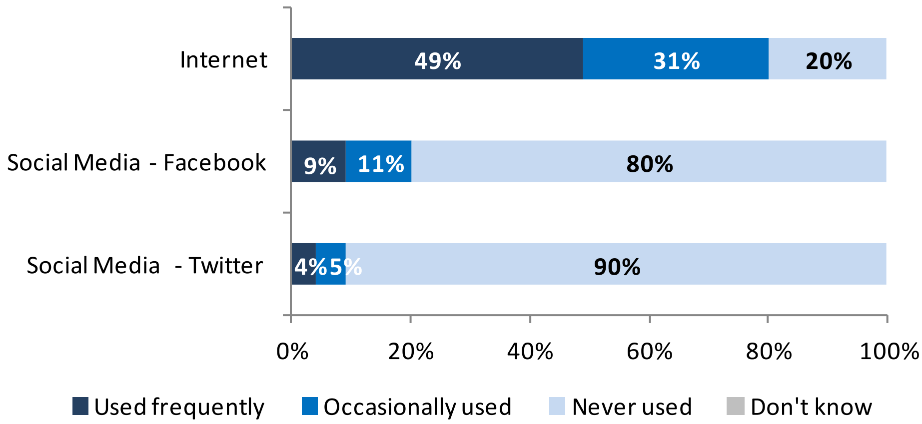
D5A In which of the following ways should AHVLA communicate with you for routine correspondence? Base: All respondents – 403. D5B In which of the following ways should AHVLA communicate with you in an emergency? Base: All respondents – 403.

9.4 Use of the internet and online social networks

Current use

All respondents were asked to describe their usage of the internet, and online social media. As illustrated below in Figure 9.5, whilst eight in ten respondents (80%) reported that they either frequently (49%) or occasionally (31%) used the internet, only two in ten respondents (20%) used Facebook, and one in ten respondents (9%) used Twitter.

Figure 9.5 Use of the internet and social media



D6. How would you describe your use of the following?: Internet, Social media – Facebook, Social media – Twitter. Base: All respondents – 403.

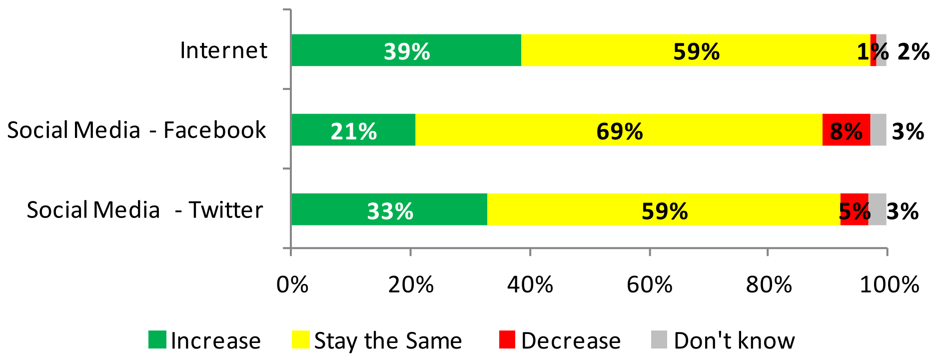
Those who were most likely to “frequently use” the internet (49%) tended to be located in the Midlands (60%) and South East (64%), keep pigs and/or horses (74% and 62% respectively). Perhaps because of their frequent internet use, these respondents were also typically direct users (53%), or used some services directly, and others via an intermediary or agent (59%). These respondents were also most likely to be aged either under 45 (67%), or 45 – 64 (54%), compared to those aged 65+ (21%).

It is a positive finding for AHVLA that a high proportion of respondents reported using the internet, and AHVLA should be encouraged that much of their customer base appears to have the capacity to interact with online services should they need to. This is likely to prove beneficial to AHVLA in light of the government’s Digital by Default agenda.

Future use

Those who currently used the internet, Facebook and/or Twitter either (frequently or occasionally) were asked whether they envisaged their future use to increase, stay the same, or decrease in the coming year. As outlined below in Figure 9.6, the vast majority of current internet, Facebook and/or Twitter users expected their use to either stay the same, or increase.

Figure 9.6 Future use of the internet and social media (current users)



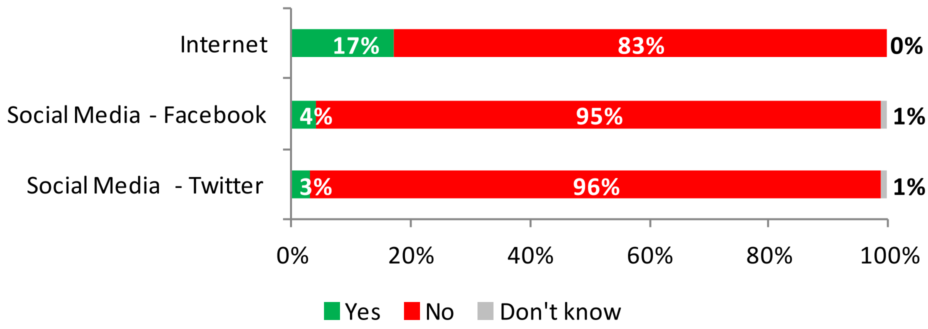
D7a. Do you envisage your use of the following to increase stay the same or decrease in the coming year?: Internet, Social media – Facebook, Social media – Twitter. Base: All respondents who reported frequent or occasional use – internet (322), Social media – Facebook (80), Social media – Twitter (39).

In contrast, those who reported that they did not use the internet, Facebook and/or Twitter were asked whether they envisaged using these services over the coming year.

As outlined overleaf in Figure 9.7, anticipated take up for these services was limited, and the vast majority of those who did not use Facebook and/or Twitter reported that they did not envisage using these services over the coming year (95% no for Facebook, and 96% no for Twitter).

One in six (17%) non internet users did, however, expect to use the internet over the coming year. As this 17% only represents 14 respondents, no further profiling of this group is possible.

Figure 9.7 Future use of the internet and social media (non users)



D7b. Do you envisage using the following during the coming year?: Internet, Social media – Facebook, Social media – Twitter. Base: All respondents who reported no use, or did not know – internet (81), Social media – Facebook (323), Social media – Twitter (364).

10 Conclusions

The overall aim for the research was to gain an in-depth understanding of customer perceptions, experiences, attitudes and motivations in relation to their interactions with the AHVLA.

We also aimed to explore awareness and perceptions of the purpose and role of AHVLA, satisfaction with AHVLA services and interactions, preferred communications channels, levels of engagement with sources of information and newer media, and levels of trust with AHVLA.

This section provides a synopsis of these findings:

A wide range of responsibilities for AHVLA were identified, and 50% regarded AHVLA as responsible for providing advice or information on animal health and welfare.

Although comparisons with 2012 data have only been made on an indicative basis, the increase in awareness amongst respondents of AHVLA's responsibilities is encouraging. AHVLA should capitalise on this increased awareness by reviewing any previous communications campaigns, and continuing to clearly outline their services to livestock keepers. The provision of further information about AHVLA's areas of responsibility could help livestock keepers to identify AHVLA as a source of information and/or services in the future, and also recognise when it is or is not appropriate for them to contact AHVLA.

Levels of satisfaction with AHVLA varied; whilst overall satisfaction was in line with 2012 (7.4), and ORC International's benchmark for satisfaction for business to business customer groups (74%), Key Driver Analysis identified the need for improvements in query resolution and written communications.

AHVLA's staff and information was identified as an area of strength, and the top key driver of overall satisfaction with AHVLA. In contrast, query resolution, and written communications were identified as the second and third key drivers, and areas for improvement. Our analysis indicated a high level of association between these areas and overall satisfaction with AHVLA, therefore any improvements here are likely to also result in an improvement in overall customer satisfaction.

In terms of specific sub groups to focus on, pig keepers appeared to report higher levels of dissatisfaction with timeliness and quality of query resolution, and AHVLA understanding their business needs. Furthermore, livestock keepers in the South East and North East reported high levels of dissatisfaction with written communications, and AHVLA as a organisation they hear good things about. Those in the North East also recorded high levels of overall dissatisfaction with AHVLA.

Preferred communications channels were post (54%) or email (33%) for routine correspondence, and telephone (69%), email (15%), or SMS text message (8%) in an emergency.

Private veterinary surgeons provided a key source of advice for livestock keepers, as more than four in five respondents (83%) reported that they normally sought advice from this group. Whilst most livestock keepers reported using two (61%), or three or more (37%) sources of information and/or advice, half (49%) had not visited a government website in the last 12 months to obtain information and/ or advice on animal health and welfare related issues. Therefore, any information on websites should also be supplemented by other channels. AHVLA should also consider how best to convey key messages via partners and other agencies when looking to influence the behaviour and activity of livestock keepers.

Four in five respondents (80%) had used the internet, but current usage and likely future usage of Facebook and Twitter appear limited.

Any future online communications activity should focus on the internet, rather than Facebook and Twitter. Whilst some livestock keepers do use Facebook and Twitter, they represent a minority (only 20% reported using Facebook, and 9% Twitter), and do not expect AHVLA to communicate via this channel. Furthermore, there is limited evidence of a significant increase in usage of these channels across the wider customer population.

This high internet usage amongst respondents is a positive finding given pressures on AHVLA to comply with the government's Digital by Default agenda. In order to maximise the success of any future online communications, these communications should be considered in line with the suggested improvements to query resolution and written communications identified previously.

Advocacy of AHVLA was strong, as four in five users of AHVLA's advice service (78%) would recommend the advice service to other farmers, and a similar proportion of AHVLA's general service users (81%) would speak well of AHVLA's services to other farmers.

Whilst agreement that AHVLA is a trusted organisation was positive (with an overall score of 7.8, and with 85% of respondents in agreement that AHVLA was a trusted organisation), perceptions of AHVLA as an organisation which respondents heard good things about (6.6; 29% disagreement), or an organisation that understands their business needs (6.7; 26% disagreement) were more negative.

10.1 Summary

As an overall synopsis, whilst AHVLA is currently performing well, and overall satisfaction is in line with both 2012, and ORC International's Government Departments and Agencies benchmark, this report has identified several areas where AHVLA could look to improve their performance.

In light of the Key Driver Analysis that was conducted, we anticipate that by targeting some specific improvements in key areas around query resolution, and written communications, AHVLA could improve the customer experience (and therefore overall satisfaction), and also look to contribute to the overall goals of reducing costs, increasing revenues, improving customer service, managing relationships more effectively and creating sustained increases in organisational capability.

We have found in other customer research for government organisations, that clients who invest time in ensuring that communications are as clear as possible and that customer interactions and enquiries are delivered effectively, can reap real benefits in reducing the need for further follow-up activity and reducing the overall costs of service delivery by enabling customers in getting their interactions 'right first time'.

11 Recommendations

Based on the analysis of the survey results, three areas for action have been identified:

1. **Promote high satisfaction with AHVLA staff and information**

This is the top key driver of overall satisfaction with AHVLA, and an area where AHVLA is performing strongly. Current AHVLA service users rated helpfulness of staff as the most important attribute (9.0), and also an area where AHVLA was performing well (8.0). This success should be shared with AHVLA staff to help them recognise the importance of the high quality service provided to AHVLA customers.

To ensure a consistently high service is provided to all customers, one area to improve which links to AHVLA staff and information is knowledge of staff, which was rated by current service users as very important (8.9), but where satisfaction was slightly lower (7.7).

2. **Improve query resolution**

Improving query resolution is the second key driver of overall satisfaction with AHVLA, and an area where AHVLA should look to improve. This is underlined by the verbatim comments provided by respondents who were dissatisfied with AHVLA focussing on issues with query resolution, and the request for improvement to ensure a speedy response to any issues (5%). This suggests that the quality of query resolution is also linked to perceptions of the time taken to respond to any queries or issues.

As noted in Section 6, key customer groups to focus on in terms of dissatisfaction with query resolution were pig keepers, those located in the South East, and direct service users.

Due to the strength of the association between query resolution and overall satisfaction, improvements in this area are anticipated to also increase overall satisfaction with AHVLA.

3. **Improve written communications**

Improving written communications is the third key driver of overall satisfaction with AHVLA, and an area where AHVLA should look to target improvements. As with query resolution, the Key Driver Analysis conducted indicated a strong association between written communications and overall satisfaction, therefore we would suggest that improvements in written communications would also increase overall satisfaction with AHVLA.

One starting point to improving AHVLA's written communications could be to review the significant differences in satisfaction with written communications by region, and potentially use the higher satisfaction with written communications in Scotland[32] as a case study to understand why communications are seen more favourably, and inform whether improvements could be targeted at livestock keepers in the North East and South East.

ORC International suggest that, where possible, standardising written communications across all regions, and ensuring that all language used is as clear as possible would be a sensible place to start. Increased clarity in AHVLA's written communication may also help AHVLA to realise additional benefits in a reduced amount of queries, higher levels of compliance with directions received from AHVLA, and communication which can be uploaded to the AHVLA and Gov.uk websites, in support of the government's Digital by Default agenda.

Further research could also help to uncover any specific issues with written communications relating to (for example) the particular language used, communication in relation to specific issues, specific locations, or specific teams, and or any suggestions for improvement from AHVLA service users.

[32] Much of AHVLA's written communications focus on TB services and compliance. One potential reason for higher satisfaction with written communications in Scotland could be the lower prevalence of TB, and the corresponding lower levels of written communication in relation to TB.

12 Appendix A: Detailed Methodology

This section details the methodological background to the sampling, telephone interviews, and statistical analysis completed by ORC International as part of this research project for AHVLA.

This project was conducted in compliance with ISO 20252.

12.1 Sampling

The target group for this research was livestock keepers. A total of 4000 pieces of sample were drawn from an independent sample provider based on both location, and Standard Industrial Classification (SIC) 2007. The sample requested by both of these variables is outlined below.

Figure A1 Sample Requested by Location

The sample requested by location was disproportionate to the population of livestock keepers, in order to enable to analysis across the six location groups outlined below.

Location	Number of sample records requested
Midlands	670
North	670
South East	670
South West[33]	670
Scotland	520
Wales	800
Total	*4,000*

[33] Excluding the following postcodes, which were classified as a HIGH flood risk by the Flood Forecasting Centre as at 21 February 2014: TA7 0AN, TA7 0AP, TA7 0AS, TA7 0AT, TA7 0AU, TA7 0AW, TA7 0AX, TA7 0DJ, TA7 0DJ, TA7 0LU, TA7 0RB, TA7 0RG, TA7 0RL, TA7 0RW, TA7 0SA, TA7 6JE.

Figure A2 Sample Requested by SIC 2007

The sample requested by SIC 2007 code was guided by the populations of livestock keepers keeping different livestock provided by AHVLA.

A discrepancy was identified that whilst AHVLA records multiple types of livestock per livestock keeper, SIC 2007 identifies livestock keepers only by their single main type of livestock (or as “mixed” or “other” livestock keepers).

A decision was taken to request sample to match AHVLA’s populations of livestock keepers as closely as possible, in order to enable the telephone interviews to fall out naturally and include as many types of livestock keeper as possible. The breakdown of sample against SIC code is provided in the table below:

SIC 2007 Code	AHVLA Population	Number of sample records requested
01.410 - Raising of dairy cattle	65,252	1181
01.450 - Raising of sheep and goats	108,218	50*
01.460 - Raising of swine/pigs	50,520	95*
01.470 - Raising of poultry	58,583	824*
01.430 - Raising of horses and other equines	2,194	61
01.490 - Raising of other animals	2,065	895
01.500 - Mixed farming	Included above	894[34]
Total	*172,273*[35]	*4,000*

[34] Excluding business activities for "Grow and Sell Agricultural Produce".

[35] Total number of livestock keepers according to AHVLA as at 13 February 2014. Please note that the sum of each type of livestock keeper adds up to more than the overall total, as some livestock keepers keep more than one species.

* All sample available requested.

12.2 Telephone Interviews

A total of 403 telephone interviews conducted with livestock keepers across Great Britain between Wednesday 5 March 2014, and Friday 28 March 2014.

The response rate for this survey was 33%. This was calculated based on 403 completed interviews, out of 1,219 pieces of sample which had been contacted and directly asked to participate in this research.

The data were not weighted, and no incentives were offered for participation in the survey.

12.3 Statistical Analysis

Key Driver Analysis was conducted in order to determine the aspects of the customer experience that had the strongest association with overall satisfaction with AHVLA. The specific techniques used were:

- **Factor Analysis**: to group the chosen survey questions into underlying factors (themes) that are measured across the questionnaire. The Key Driver Analysis follows the structure provided by the factor analysis to build a series of statistical models to help determine which factors are most related to Overall Satisfaction and then which questions are the "key drivers".
- **Correlation analysis**: to identify attributes with the highest association with overall satisfaction with AHVLA.

Figure A3 below illustrates the factors confirmed by the factor analysis for AHVLA:

Figure A3 Factors for Key Driver Analysis

#	Factor Name	Questions Included
1	Written Communication	• D4. Thinking about the last 12 months, how satisfied overall are you overall with AHVLA's written communications (paper/ email)?
2	AHVLA Staff and Information	C3. And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? • Knowledgeable staff • Helpfulness of staff • Providing information that is relevant to you and your business

#	Factor Name	Questions Included
3	Query Resolution	C3. And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? • The quality of resolution to your query or issue
4	AHVLA Openness and Accessibility	C3. And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? • Being open and transparent in our dealings with you • Ease of access to services • Giving you the opportunity to provide feedback
5	Timeliness	C3. And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? • Responding to animal health, disease, welfare and biosecurity issues in a timely manner • Time taken to respond to queries/ issues
6	AHVLA Paper Based Processes	C1. Overall, how satisfied are you with these processes? • Registration • Issue of licences certificates & approvals • Compensation payments • Advice & Guidance
7	Animal Disease and Testing	C1. Overall, how satisfied are you with these processes? • Dealing with notifiable disease reports, such as foot and mouth disease, avian influenza, BSE or scrapie • Animal disease surveillance: Looking for new diseases and monitoring existing diseases • On farm testing of animals • Laboratory testing • Inspections

13 Appendix B: Research Materials

This section includes the telephone questionnaire used to speak to 403 livestock keepers in February and March 2014.

ORC International
AHVLA
Livestock Keeper Satisfaction and Communication Survey

IF SWITCHBOARD OR SECRETARY: Good morning/good afternoon, may I speak with NAMED CONTACT/PERSON (person who is responsible, in dealing, directly or indirectly, with various animal health / environmental agencies)

IF REFERRAL: May I please have the name and contact number for the person with whom I should speak?

WHEN THROUGH TO THE RIGHT PERSON: Good morning/afternoon, my name is _________________ and I'm calling from a market research company called ORC International. We are presently undertaking a study on behalf of the Animal Health and Veterinary Laboratories Agency (AHVLA) to give farmers an opportunity to express their views on the service that they deliver, in order to help AHVLA improve its performance.

This research study is being carried out in accordance with the Market Research Society guidelines and I can assure you that all of your comments are confidential and your details will not be shared with any third parties.

The survey will take no longer than 15 minutes. Would you be willing to take part?

IF FURTHER INFORMATION REQUESTED:

- Send email verifying the research
- (If preferred) contact details are:
- Cat York, Senior Research Executive, ORC International, 020 7675 1061, cat.york@orc.co.uk

IF WILLING TO PARTICIPATE CONTINUE WITH MAIN SURVEY

Section A: Classification and Screening

FROM SAMPLE – REGION

A1 In which country/ region are you based?

1	South West England	90 (LOOSE QUOTA)
2	South East England	
3	Midlands (East and West) England	90 (LOOSE QUOTA)
4	North West England	90 (LOOSE QUOTA)
5	North East England	
6	Scotland	80 (LOOSE QUOTA)
7	Wales	50 (LOOSE QUOTA)

8	OTHER	**THANK AND CLOSE**

ASK ALL		
A2 To what extent are you responsible, as part of your role, in dealing, directly or indirectly, with various animal health / environmental agencies or similar organisations? **READ OUT.SINGLE CODE.**		
1	Full responsibility	CONTINUE
2	Some responsibility	
3	No responsibility	**THANK AND CLOSE**

ASK ALL		
A3 Which of the following animals do you have on your farm / business or premises? **READ OUT. MULTICODE.**		
1	Cattle	CONTINUE
2	Sheep	CONTINUE
3	Pig	CONTINUE
4	Poultry/ Birds	CONTINUE
5	Camelids	CONTINUE
6	Goat	CONTINUE
7	Horse	CONTINUE
8	Other – SPECIFY (Interviewer to prompt for the largest other single species)	CONTINUE
9	Don't know	CONTINUE
10	None of the above	**THANK AND CLOSE**

ASK ALL		
A4 Approximately how many of these animals do you keep in your farm / business when fully stocked? Please think about each type of animal separately. **DP PRE-POPULATE WITH CODES SELECTED FROM A3 ONLY** **OPEN NUMERIC** **READ OUT. MULTICODE.**		
1	Cattle	---
2	Sheep	---
3	Pig	---
4	Poultry/ Birds	---
5	Camelids	---
6	Goat	---
7	Horse	
8	Other – SPECIFY (Interviewer to prompt for the largest other single species)	---
9	Don't know	---

IF A3=1 (CATTLE FARMERS)		
A5 Which of the following type of cattle do you have most of? **READ OUT. MULTICODE.**		
1	Dairy cattle	CONTINUE
2	Meat/ beef cattle	CONTINUE
3	Mixed Meat and Dairy use	CONTINUE
4	Other – SPECIFY	CONTINUE
5	Don't know	CONTINUE

IF A3=2 (SHEEP FARMERS)		
A6 Which of the following type of sheep do you have most of? **READ OUT. MULTICODE.**		
1	Dairy sheep	CONTINUE
2	Meat sheep	CONTINUE
3	Wool sheep	CONTINUE
4	Breeding stock for wool/meat production	CONTINUE
5	Other – SPECIFY	CONTINUE
6	Don't know	CONTINUE

IF A3=4 (POULTRY/ BIRD FARMERS)		
A7 Approximately how many of the following types of birds do you keep in your farm / business when fully stocked? **DP – Allow a numeric value to be added for each code** **READ OUT. MULTICODE**		
1	Chickens	CONTINUE
2	Geese	CONTINUE
3	Turkey	CONTINUE
4	Duck	CONTINUE
5	Pheasant	CONTINUE
6	Other – SPECIFY(Interviewer to prompt for the largest other single type of bird)	CONTINUE

ASK ALL		
A8 Is farming your main income? **DO NOT READ OUT. SINGLE CODE.**		
1	Yes	CONTINUE **(LIVESTOCK FARMERS)**
2	No	CONTINUE **(HOBBY FARMERS)**
3	Don't know	CONTINUE **(HOBBY FARMERS)**

Section B: Awareness of and interaction with AHVLA

ASK ALL		
B1 Firstly, before this call, were you aware of the Animal health and the Veterinary Laboratories Agency (AHVLA), which is a Defra Agency, and the services it provides? **DO NOT READ OUT. SINGLE CODE.**		
1	Yes	CONTINUE
2	No	**THANK AND CLOSE**
3	Don't know	CONTINUE

IF B1=1, 3 (AWARE OF AHVLA OR DK)		
B2 What would you say the Animal Health and Veterinary Laboratories Agency is responsible for? *Note to interviewer: throughout the questionnaire, by the name AHVLA we are referring to the agency which includes both the Animal health (AH) and the Veterinary Laboratories Agency (VLA).* **DO NOT READ OUT. MULTICODE.**		
1	Prevention & Control of diseases & disease outbreak	CONTINUE
2	Providing advice/ info on animal health and welfare	CONTINUE
3	Dealing with notifiable diseases and disease reports	CONTINUE
4	Assessing disease/ infection risk	CONTINUE
5	Research/ investigation into new disease	CONTINUE
6	Registering animal keepers and animals	CONTINUE
7	On farm testing: e.g. TB testing	CONTINUE
8	Laboratory testing/ taking samples	CONTINUE
9	Dealing with licensing, certification & approvals	CONTINUE
10	Inspections	CONTINUE
11	Tracing animal movements	CONTINUE
12	Compensation payments	CONTINUE
13	Monitoring (checking incidence of) animal disease	CONTINUE
14	Other – SPECIFY	CONTINUE
15	Don't know	CONTINUE

IF B1=1, 3 (AWARE OF AHVLA OR DK)		
B3 Which of the following best reflects the overall nature of your relationship with AHVLA? **If you are not a current AHVLA service user please answer based on your past experience (over 12 months ago) or future intention (planning to do so in the next 12 months).** **Interviewer note:** please read out if required: "By intermediaries we mean organisations or individuals that work with the AHVLA on your behalf, or provide services to you that fulfil AHVLA requirements that you need to meet". **READ OUT. SINGLE CODE.**		
1	I am a direct user/ have direct experience of AHVLA services	CONTINUE **(MINIMUM OF 200 INTERVIEWS)**

2	I use/ have experience of AHVLA services through the assistance of another person or organisation e.g. an intermediary	CONTINUE
3	I use/ have experience of AHVLA services both through an intermediary as well as by direct communication with the AHVLA	CONTINUE
4	I do not use/ have no experience of AHVLA services	**SKIP TO D1**
5	Other (Please specify)	CONTINUE

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES)

B4 Which of the following best describes the frequency of your interactions with AHVLA?

READ OUT. SINGLE CODE.

1	I regularly (once a month or more) use, or have involvement with AHVLA services	CONTINUE **(CURRENT USER)**
2	I sometimes (once every 2-3 months) use or have involvement with AHVLA services	CONTINUE **(CURRENT USER)**
3	I rarely (once or twice a year) use or have involvement with AHVLA services	CONTINUE **(CURRENT USER)**
4	I have used, or had involvement with AHVLA services in the past, but am not using their services currently	**SKIP TO D1 (LAPSED USER)**
5	Don't know	CONTINUE

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES)

B5. In which of the following areas do you have any experience of dealing (liaising/ interacting) with AHVLA? For each area please can you let me know if contact is either directly made with AHVLA or whether this is completed through an intermediary?

DP – ONLY ASK B5_5 IF AS=1 (CATTLE FARMERS)

READ OUT. SINGLE CODE PER AREA.

		DIRECT	INTERMEDIARY	DON'T KNOW	NO EXPERIENCE
1	Registration				
2	On farm testing of animals				
3	Laboratory testing				
4	Animal disease surveillance: Looking for new diseases and monitoring existing diseases				
5	Compensation payments				
6	Inspections				
7	Issue of licences certificates & approvals				
8	Dealing with notifiable disease reports, such as foot and mouth disease, avian influenza, BSE or scrapie				
9	Advice & guidance				

Section C: Satisfaction with AHVLA services

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES). IF B5= 1 TO 9=DIRECT OR INTERMEDIARY USERS

C1. Overall, how satisfied are you with this/these process(es)? Please could you give me a satisfaction rating of between 1 and 10, where 1 is not at all satisfied and 10 is extremely satisfied.
DP: PRE-POPULATE WITH ALL CODES SELECTED AT B5. ASK FOR EACH INTURN (B5_1 TO 10)
READ OUT, MULTI CODE.

1	Registration	**1-10, D/K**
2	On farm testing of animals	**1-10, D/K**
3	Laboratory testing	**1-10, D/K**
4	Animal disease surveillance: Looking for new diseases and monitoring existing diseases	**1-10, D/K**
5	Compensation payments	**1-10, D/K**
6	Inspections	**1-10, D/K**
7	Issue of licences certificates & approvals	**1-10, D/K**
8	Dealing with notifiable disease reports, such as foot and mouth disease, avian influenza, BSE or scrapie	**1-10, D/K**
9	Advice & Guidance	**1-10, D/K**

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES).

C2 In general how important is each of the following factors to you when dealing with AHVLA? Please answer based on a scale of 1-10 where 1 means 'not at all important' and 10 means 'extremely important'.

READ OUT.

1	Knowledgeable staff	**1-10, D/K**
2	Helpfulness of staff	**1-10, D/K**
3	Time taken to respond to queries/ issues	**1-10, D/K**
4	Responding to animal health, disease, welfare and biosecurity issues in a timely manner	**1-10, D/K**
5	Being open and transparent in our dealings with you	**1-10, D/K**
6	Giving you the opportunity to provide feedback	**1-10, D/K**
7	Ease of access to services	**1-10, D/K**
8	The quality of resolution to your query or issue	**1-10, D/K**
9	Providing information that is relevant to you and your business	**1-10, D/K**

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES).

C3 And based on your experience how satisfied would you say you are with AHVLA's performance against these factors? Please answer based on a scale of 1 – 10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'.
READ OUT.

1	Knowledgeable staff	**1-10, D/K**
2	Helpfulness of staff	**1-10, D/K**
3	Time taken to respond to queries/ issues	**1-10, D/K**
4	Responding to animal health, disease, welfare and biosecurity issues in a timely manner	**1-10, D/K**
5	Being open and transparent in our dealings with you	**1-10, D/K**

6	Giving you the opportunity to provide feedback	**1-10, D/K**
7	Ease of access to services	**1-10, D/K**
8	The quality of resolution to your query or issue	**1-10, D/K**
9	Providing information that is relevant to you and your business	**1-10, D/K**

Section D: Sources of information and advice

I'd now like to ask you a few questions on guidance information on animal health/ animal welfare, and your view on communications received from AHVLA.

ASK ALL

D1 Firstly, from which organisations do you normally seek information and/ or advice on animal health advice and welfare related issues?

DO NOT READ OUT. MULTICODE.

1	AHVLA (Animal Health and Veterinary Laboratories Agency)	CONTINUE
2	Defra	CONTINUE
3	Scottish Government	CONTINUE
4	Welsh Government	CONTINUE
5	Scotland's Rural College (formerly SAC)	CONTINUE
6	RPA (Rural Payments Agency)	CONTINUE
7	Private Veterinary Surgeon	CONTINUE
8	Industry bodies (NFU, EBLEX, BPC, BPEX, NSA etc)	CONTINUE
9	Other livestock keepers	CONTINUE
10	Independent advisory service or consultant	CONTINUE
11	Industry specific publications	CONTINUE
12	Farming press	CONTINUE
13	Other (SPECIFY)	CONTINUE
14	Don't know	CONTINUE

ASK ALL

D2. Have you visited any of the following websites in the last 12 months in order to obtain information and/ or advice on animal health advice and welfare related issues?

READ OUT. MULTICODE.

1	AHVLA	CONTINUE
2	Defra	CONTINUE
3	Scottish Government	CONTINUE
4	Welsh Government	CONTINUE
5	Gov.UK	CONTINUE
6	Other – (SPECIFY)	CONTINUE
7	None of these	SKIP TO D4

If D2=1 (VISITED AHVLA WEBSITE IN LAST 12 MONTHS)

D3. What were the main reasons for visiting the AHVLA website?

DO NOT READ OUT. MULTICODE.

1	Learn more about the work of AHVLA	CONTINUE
2	Find AHVLA contact details	CONTINUE
3	Read information about livestock diseases	CONTINUE
4	Download a form	CONTINUE

5	Read guidance on managing bovine TB (e.g. controls in place, tests, movement restrictions)	CONTINUE
6	Read guidance on importing and exporting	CONTINUE
7	Read guidance on keeping animals (welfare, registration, identification, feeding, fallen stock etc)	CONTINUE
8	Other – SPECIFY	CONTINUE
9	Don't know	CONTINUE

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES).

D4 Thinking about the last 12 months, how satisfied overall are you overall with AHVLA's written communications (paper/ email)?
Please answer based on a scale of 1 – 10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'.

1	Overall satisfaction with AHVLA's written communications	**1-10, D/K**

ASK ALL

D 5a In which of the following ways should AHVLA communicate with you for routine correspondence?
D5b In which of the following ways should AHVLA communicate with you in an emergency?

READ OUT. SINGLE CODE FOR D5A AND D5B.

1	Email	CONTINUE
2	Post	CONTINUE
3	AHVLA website	CONTINUE
4	Electronic newsletter	CONTINUE
5	SMS text	CONTINUE
6	Telephone	CONTINUE
7	Social media (e.g. Twitter/ Facebook)	CONTINUE
8	Other (please specify)	CONTINUE
9	Don't know	CONTINUE

ASK ALL

D6 How would you describe your use of the following?

READ OUT. SINGLE CODE FOR EACH.

1	Internet	1.Never used 2.Occasionally used 3. Used frequently 4. DK
2	Social Media - Twitter	1.Never used 2.Occasionally used 3. Used frequently 4. DK
3	Social Media - Facebook	1.Never used 2.Occasionally used 3. Used frequently 4. DK

IF D6_1 = 2,3, D6_2=2,3 AND/OR D6_3=2,3 ASK D7A

D7a Do you envisage your use of the following to increase, stay the same, or decrease in the coming year?

READ OUT. SINGLE CODE FOR EACH.

1	Internet	Increase, Decrease, Stay the same, DK
2	Social Media - Twitter	Increase, Decrease, Stay the same, DK
3	Social Media - Facebook	Increase, Decrease, Stay the same, DK

IF D6_1=1 OR 4, D6_2=1 OR 4 AND/ OR D6_3=1 OR 4 ASK D7B		
D7b Do you envisage using the following in the coming year? **READ OUT. SINGLE CODE FOR EACH.**		
1	Internet	Yes, No, Don't Know
2	Social Media - Twitter	Yes, No, Don't Know
3	Social Media - Facebook	Yes, No, Don't Know

Section E: Overall satisfaction with AHVLA

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES)		
E1 Please provide a rating for your overall satisfaction with the service you receive from AHVLA. on a scale from 1 to 10 where 1 means 'not at all satisfied' and 10 means 'extremely satisfied'		
1	Overall satisfaction with AHVLA	**1-10, D/K**

IF DISATISSFIED (E1= 4 OR BELOW)
E2. What were the main reasons you were dissatisfied with the service from the AHVLA?
OPEN VERBATIM

IF VERY SATISFIED (E1= 9 OR 10)
E3. What is it that AHVLA does well?
OPEN VERBATIM

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES)
E4. What one thing could AHVLA do to improve its service?
OPEN VERBATIM

Section F: Overall perception of AHVLA

We are nearing the end of the survey and just have a few more questions on your overall perceptions of AHVLA…

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES)		
F1 To what extent do you agree / disagree with the following statements? Please score on a scale of 1 to 10 where 1 is strongly disagree and 10 is strongly agree. **READ OUT.**		
1	I feel well informed in terms of protecting my business from animal	**1-10, D/K**

	disease risks	
2	I have sufficient contact with AHVLA	**1-10, D/K**
3	AHVLA is an organisation I can trust	**1-10, D/K**
4	AHVLA does more good than harm to my business	**1-10, D/K**
5	AHVLA understands my business needs	**1-10, D/K**
6	AHVLA is an organisation I hear good things about	**1-10, D/K**

IF B1=1 OR 3 AND B3=1,2,3,5 (USERS OF AHVLA SERVICES).

IF B5=9 (ADVICE SERVICES USED)
F2a Would you recommend AHVLA's advice service to other farmers?

IF B5=1-8 (USED GENERAL SERVICES)
F2b Would you speak well of AHVLA's services to other farmers?

Interviewer prompt: Based on your experience of AHVLA services.

DO NOT READ OUT, SINGLE CODE FOR BOTH F3A AND F3B

1	Yes	CONTINUE
2	No	CONTINUE
3	Don't know	CONTINUE

Section L: Demographics

Thank you for completing this survey – to help us understand the answers you have given us, we would like to ask you a few questions about yourself and your role.

ASK ALL

L1. Could you tell me which of the following age brackets you fall into?

READ OUT, **SINGLE CODE**

1	16 to 24	**CONTINUE**
2	25 to 34	**CONTINUE**
3	35 to 44	**CONTINUE**
4	45 to 54	**CONTINUE**
5	55 to 64	**CONTINUE**
6	65 to 74	**CONTINUE**
7	75 or more	**CONTINUE**
8	Refused	**CONTINUE**

ASK ALL, SINGLE CODE

L2. What is your role in your business?

READ OUT, **SINGLE CODE**

1	Business Owner / Sole Proprietor	**CONTINUE**
2	Partner / Director of business	**CONTINUE**
3	Manager	**CONTINUE**
4	Employee	**CONTINUE**
5	Family Member	**CONTINUE**
6	Other **(SPECIFY)**	**CONTINUE**

7	Refused	**CONTINUE**

ASK ALL, SINGLE CODE		
L3 **INTERVIEWER NOTE: DO NOT READ OUT, TICK GENDER**		
1	Male	
2	Female	

ASK ALL, SINGLE CODE		
L4. How long have you been farming? **DO NOT READ OUT.SINGLE CODE.**		
1	Less than a year	**CONTINUE**
2	1 – 5 years	**CONTINUE**
3	6 – 10 years	**CONTINUE**
4	11 - 20 years	**CONTINUE**
5	Over 20 years	**CONTINUE**
6	Refused	**CONTINUE**

ASK ALL , SINGLE CODE		
L5. Do you have access to the internet? **DO NOT READ OUT**, **SINGLE CODE**		
1	Yes	**CONTINUE**
2	No	**CONTINUE**
3	Don't know	**CONTINUE**

Section H: Close

ASK ALL		
END 1 **Thank you very much, that is the end of the survey.** Would you be happy for ORC International to call you again if AHVLA would like to conduct further research with farmers? **Interviewer prompt:** If we do call you again, we will provide further details on the research, and participation is voluntary. **DO NOT READ OUT. SINGLE CODE.**		
1	Yes	**CONTINUE**
2	No	**CONTINUE**
3	Don't know	**CONTINUE**

THANK AND CLOSE TEXT

Thank you very much for being willing to participate in this research. Unfortunately, you do not meet the criteria that we require for you to complete the survey. If you have any queries about this survey, I can give you the name and number of the research executive at ORC International, or if you'd like to verify our status I can give you a free phone number for the Market Research Society. Would you like these numbers?

If required read out:

Senior Research Executive, ORC International: Cat York 020 7675 1061
The Market Research Society: 0500 396 999