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Animal and Plant Health Agency

Livestock Keeper Satisfaction & Communication Survey 2015

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Aims and Objectives

Aim

To understand how APHA, its services and ways of communicating are perceived by its end user customers and to identify areas for improvement. To gain an in-depth understanding of customer perceptions, experiences, attitudes and motivations in relation to the work of the agency that they have cause to interact with.

Objectives

- Establish awareness of the agency (APHA)
- Establish awareness and perceptions of the purpose and role of the agency which could positively influence communications with service users
- Establish levels of satisfaction with APHA's services and interactions. Including Key Drivers of Satisfaction
- Establish preferred ways of communicating in different situations
- Establish levels of engagement with newer media to gain insight to support the digital by default agenda and to better understand sources of insight
- Establish levels of trust in the agency and other providers of information and advice
- Establish what's important to the respondent in dealing with APHA
- Measure performance standards against APHA'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

Methodology

Fieldwork

A total of 401 telephone (CATI) interviews were undertaken. Fieldwork took place between Wednesday 11th February 2015 and Monday 9th March 2015. Each interview took around 15 minutes to complete.

Target Group

The target group was livestock keepers in England, Scotland and Wales. Sample was obtained from two different sample providers and was selected to be representative of APHA's customers in terms of livestock kept and region. Quotas were placed on region, livestock type and relationship with APHA. Data was not weighted.

Response Rate

Overall, a response rate of 28% was achieved.

Pieces of Sample	Sample Contacted	Successful Interviews	Response Rate
3,906	1,433	401	28%

Quality

This project was conducted in compliance with ISO 20252.

- Satisfaction with the majority of aspects of APHA and its services was high and, in a number of cases (although not always significant), was higher than the previous year's findings.
- 78% of livestock keepers felt satisfied with the overall service provided by APHA, of which a quarter (24%) described themselves as very satisfied. This was in line with findings from both 2014 and 2012.
 - Overall satisfaction was found to vary by region: livestock keepers in Scotland were found to be significantly more satisfied than those in South East and North England. Overall satisfaction was not found to vary according to livestock type or relationship with APHA.
- The key drivers of overall satisfaction in 2015 were found to mirror those uncovered in 2014.
 - Four strengths that were driving high overall satisfaction were found to be: APHA Staff and Information; APHA Processing Registrations, Approvals and Compensation, and Providing Advice and Guidance; Timeliness; and Animal Disease and Testing.
 - Three areas in need of improvement were found to be: APHA Openness and Accessibility; Written Communications; and Query Resolution.
- Although three quarters (74%) of livestock keepers agreed that they would speak well of APHA's services to other livestock keepers, 60% still felt that APHA could improve.
 - When asked to specify one thing APHA could do to improve its service, 40% felt that more and clearer communication was needed.
- Livestock keepers in Scotland and, to a lesser extent, Wales were found to be significantly more satisfied with APHA than livestock keepers in each of the four regions of England. This was the case for a wide number of different areas that included APHA staff, the ease of access to services and the right people, the provision of information and query resolution.
 - In addition, livestock keepers in Wales were the most likely to feel well informed in terms of protecting their business from animal disease risks, whilst those in Scotland were most likely to agree that they felt well informed protecting their cattle from Bovine TB.
- Livestock keepers who dealt with APHA via an intermediary were found to be significantly more satisfied than those who dealt with APHA directly in a number of areas that included the way that APHA deals with notifiable diseases and the extent to which they felt informed about protecting their cattle from Bovine TB, APHA's provision of information and its reputation within farming circles.
- In general, levels of satisfaction were not found to vary significantly by the type of livestock kept.



Communication

- Two thirds (65%) of livestock keepers were satisfied with APHA's written communications, whilst a fifth (21%) stated that they were dissatisfied. This was consistent with the findings from the survey in 2014 and the mean satisfaction score remained constant at 7.2. Satisfaction with written communication was not found to change according to region, livestock type or relationship with APHA.
- Post (41%) and email (40%) were the most popular forms of communication for routine matters, whilst for emergencies over three quarters (76%) of livestock keepers preferred to be contacted via telephone.
- 30% of livestock keepers had visited the animal health and welfare-related pages on GOV.UK to obtain information and advice, although the majority (62%) had not visited any websites.
- The majority (93%) of livestock keepers had access to the internet, however private veterinary surgeons were still the main sources of advice for three quarters (74%) of livestock keepers.

Awareness

- Around a third (30%) of livestock keepers were aware of the merger between Animal Health and Veterinary Laboratories Agency (AHVLA) and parts of the Food and Environment Research Agency (FERA) to create the Animal and Plant Health Agency (APHA).
 - Livestock keepers in the South East (36%) and the North of England (35%) were significantly more likely to be aware of the changes compared to those in Scotland (18%).
- 44% of livestock keepers thought that APHA were responsible for 'providing advice/ information on animal health and welfare', 31% thought they were responsible for the 'prevention and control of diseases and disease outbreak', whilst 18% thought they were responsible for 'on farm testing'.

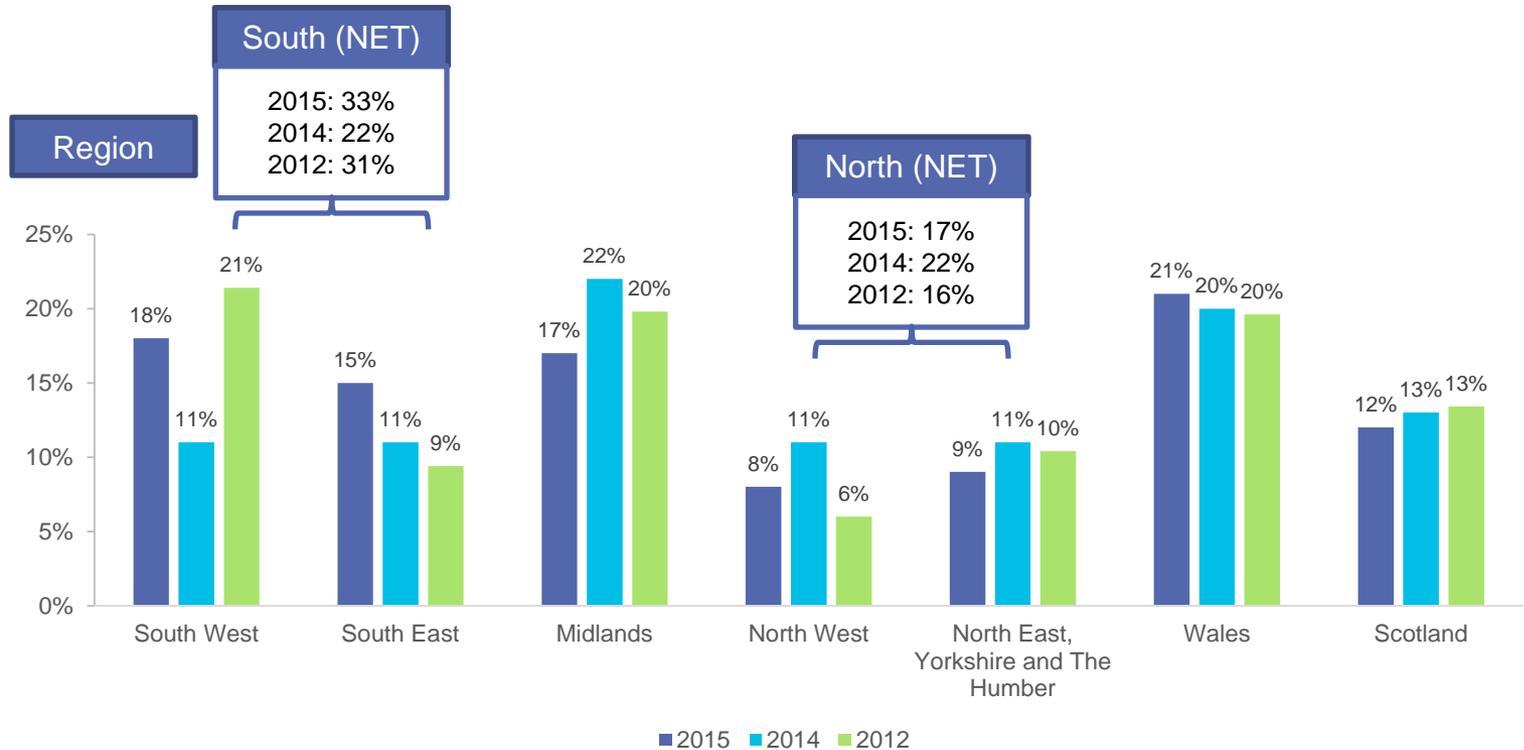


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Respondent Profile



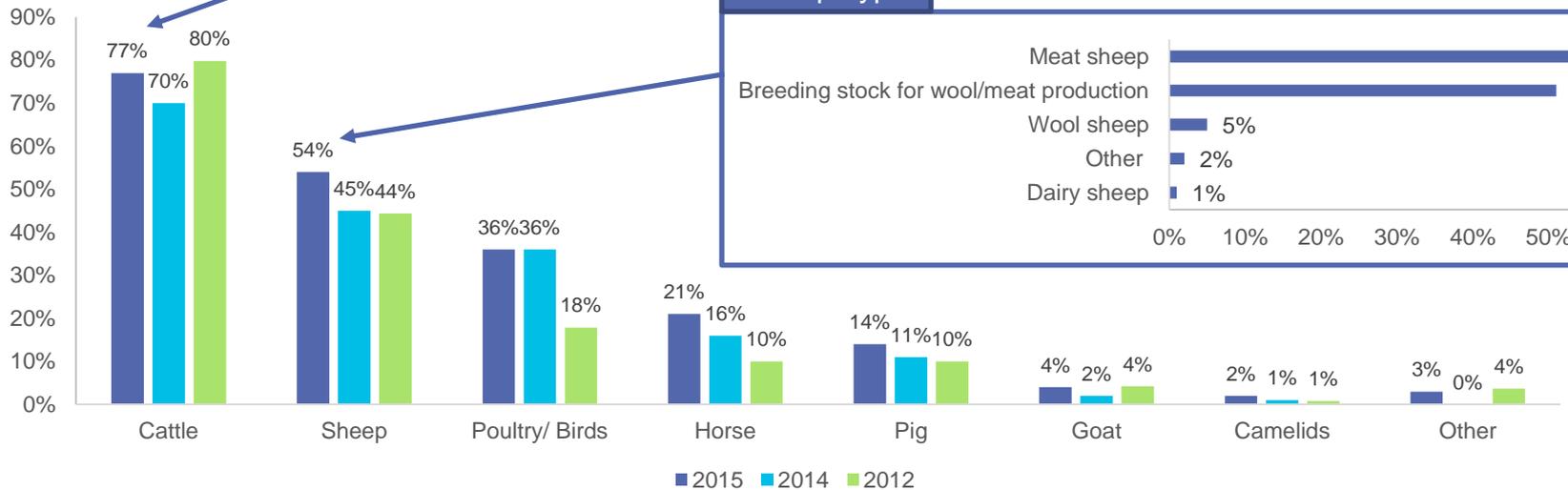
Respondent Profile - 1



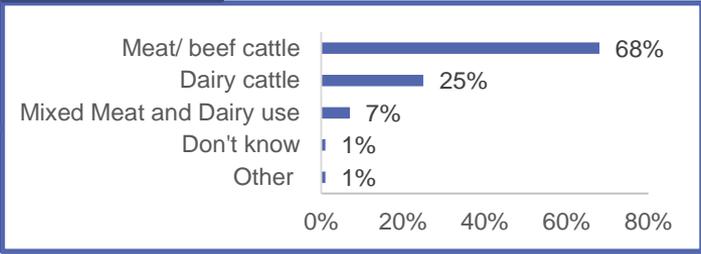
Quotas were set to ensure that the survey achieved a good spread of livestock keepers across all regions. As such, the regional profile of livestock keepers who responded to the 2015 Satisfaction and Communication Survey was broadly similar to that of both the 2014 and 2012 surveys.

Respondent Profile - 2

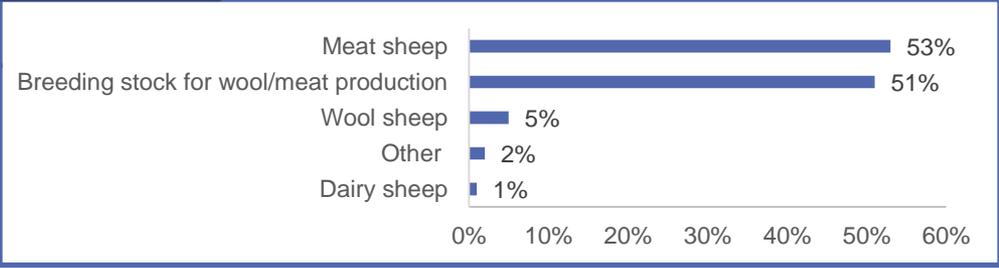
Livestock Kept



Cattle Type



Sheep Type

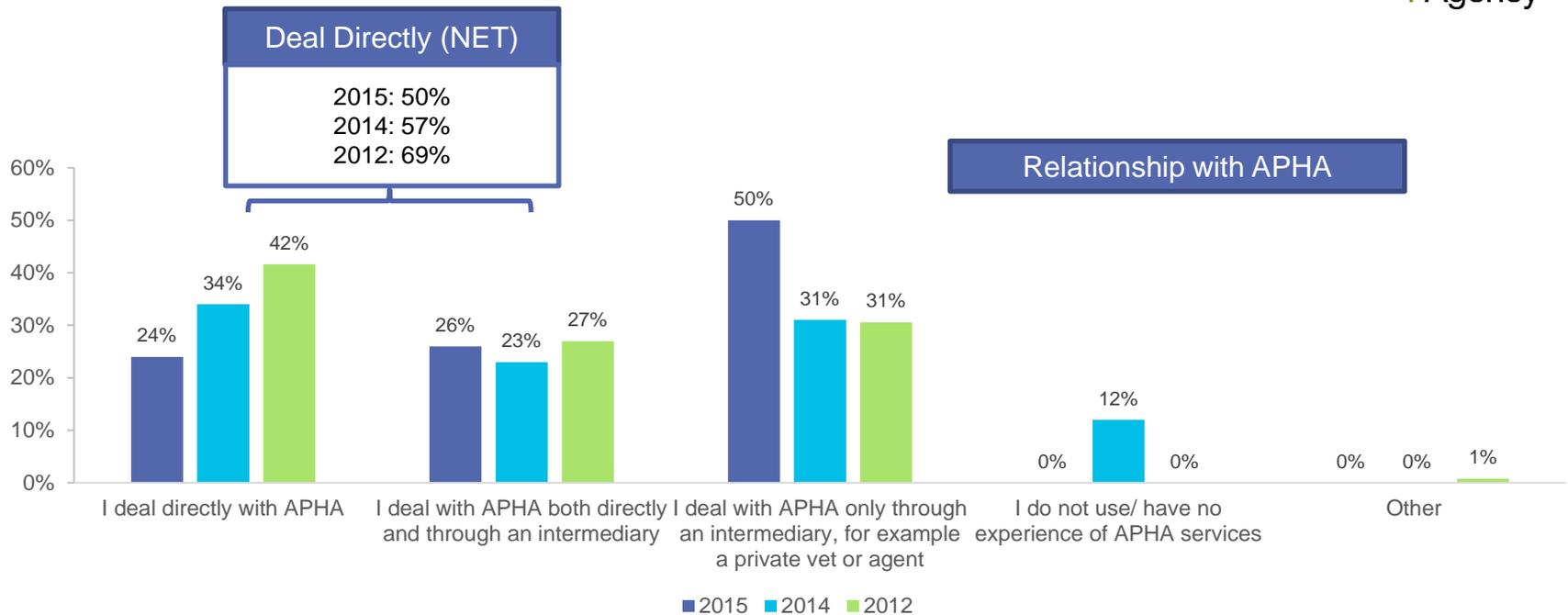


Quotas were set on the type of livestock kept to ensure that the sample profile reflected the overall population. This mirrored the methodology used in the previous year's survey, thereby enabling a valid comparison of survey findings.

The livestock profile of keepers who took part in the 2015 Satisfaction and Communication Survey was, therefore, in line with the profile of those who took part in the 2014 and 2012 surveys. As per previous years, the most frequently kept livestock type was cattle (77%), followed by sheep (54%) and poultry/ birds (36%).

Two thirds (66%) of livestock keepers kept more than one type of livestock: 37% kept two types of livestock; 19% kept three types; whilst 10% kept four or more types of livestock.

Respondent Profile - 3



All livestock keepers were asked whether they dealt with APHA directly, through an intermediary (for example a private vet or agent) or both directly and via an intermediary. Amongst livestock keepers who took part in the 2015 survey, all had some experience as a customer of APHA. Those who did not use or had no experience of APHA were screened out of the survey in 2015.

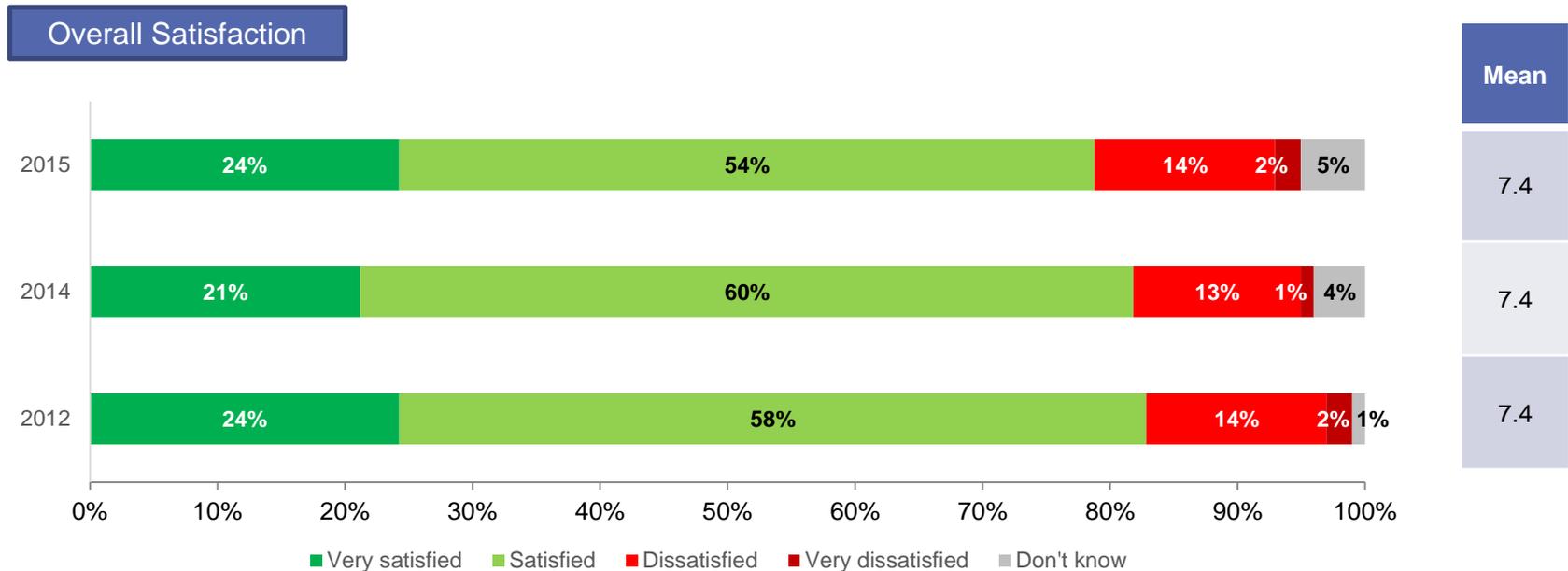
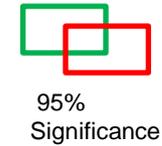
As per the previous 2014 survey, the responses of livestock keepers who dealt with APHA directly and both directly and through an intermediary in 2015 were combined.



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Overall Satisfaction

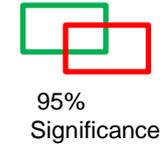
Overall satisfaction with APHA



All livestock keepers were asked how satisfied they were with the service received from APHA. 78% of livestock keepers felt satisfied overall, of which a quarter (24%) described themselves as very satisfied. This was in line with findings from both the 2014 and the 2012 surveys. The mean satisfaction score also remained unchanged at 7.4.

Overall satisfaction was found to only differ significantly by region and remained similar regardless of livestock type or relationship with APHA.

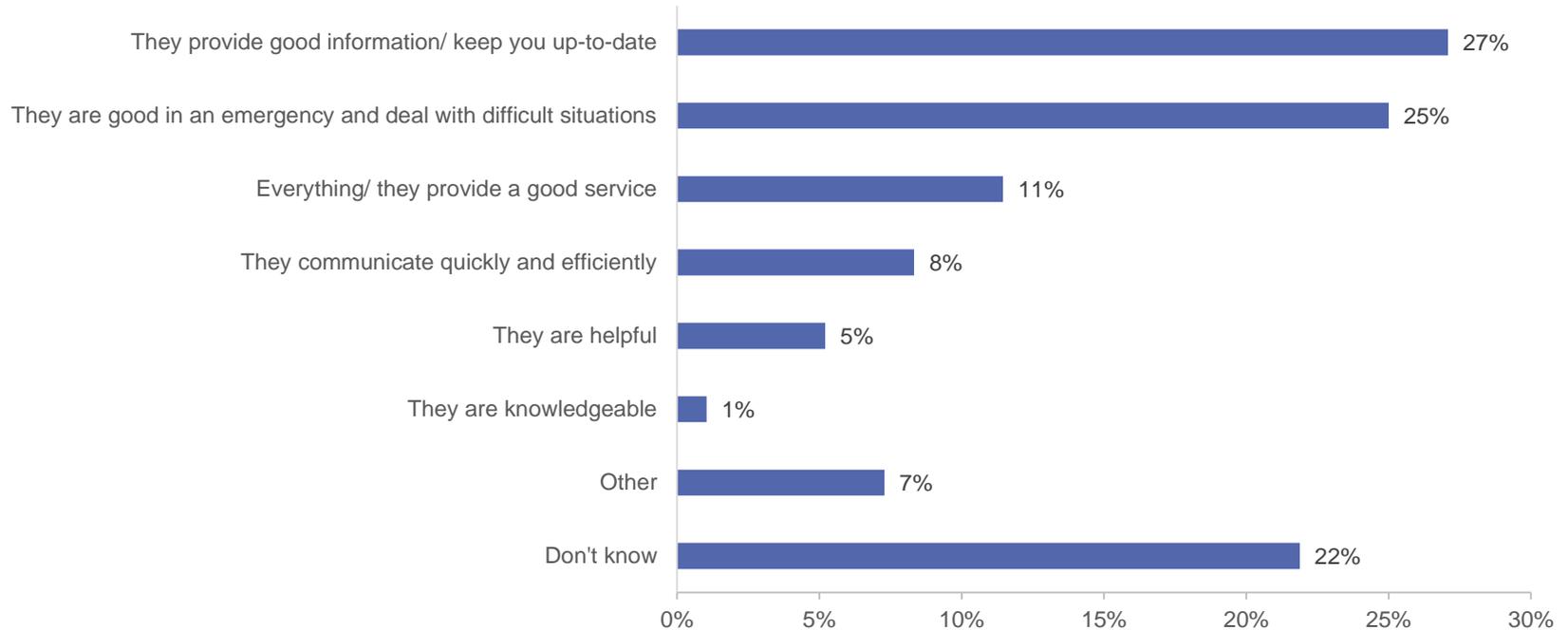
Overall satisfaction with APHA: By Region



Mean overall satisfaction scores were above 7.0 for each of the main regions. Livestock keepers in Scotland (7.9) were found to be significantly more satisfied than those in South East (7.2) and Northern (7.1) England.

Reasons for Satisfaction with the Service from APHA

Strengths



All livestock keepers who stated that they were very satisfied with the service provided by APHA were asked to specify what it was they felt APHA did well. 27% of livestock keepers felt that APHA provided good information and kept service users up-to-date, whilst a quarter (25%) felt that APHA were good in an emergency and in difficult situations.

Reasons for Satisfaction with the Service from APHA: Verbatim Responses

They provide good information

"I know what is going on and they let me know what is important."

"They are always providing regular information on animal health, welfare and disease surveillance."

"Keeping you up to date with information on diseases, rules and regulations."

"Generally they are a good source of information for farmers and are very diligent when they are doing post mortems."

"My main contact with them is about TB, they are always very efficient and are always very willing to help out, they are knowledgeable in what they do."

"They tell you about all the latest information you might need. The information comes through the post, it is informative."

They are good in an emergency

"We had a outbreak of TB and they looked after us well."

"We have had the testing on the odd cattle, getting it tested and getting it done quickly."

"They do well in emergencies, they come in to me immediately."

"They are very good at hard science and veterinary science. They are very good with care and approach to animals. Their level of expertise is pretty impressive."

They communicate quickly and efficiently

"Whenever I have had a problem they came out and responded to it promptly and dealt with it in a professional manner."

"They are very prompt with any information you require. They come back to you very quickly. They remind you of any TB testing."

Everything/ They provide a good service

"They look after farmers. They support them."

"They are there when you need them, they're around and helpful when you need them."

Reasons for Dissatisfaction with the Service from APHA

Weaknesses



Livestock keepers who were dissatisfied with the service received from APHA were asked to state the main reasons for this. Of the 24 dissatisfied livestock keepers, five mentioned a lack of communication or provision of information by APHA, four mentioned difficulties in getting through to the right person at APHA and four mentioned the lack of knowledge and professionalism of staff.

Reasons for Dissatisfaction with the Service from APHA: Verbatim Responses

Lack of communication

"I never hear from them. I have to drive the designation application myself. I got phoned three weeks after an outbreak."

"Lack of communications, not notified of changes, the number of inspections too frequent."

Getting through to the right person

"Very hard to get hold of a person to answer question. The staff are often rude and ignorant. Staff can only read from protocol and do not use common sense. It is very frustrating that TB testing is a farce."

"Finding the right person to answer your query."

Lack of knowledge

"The lack of knowledge of the people you speak to when you ring up for help and guidance."

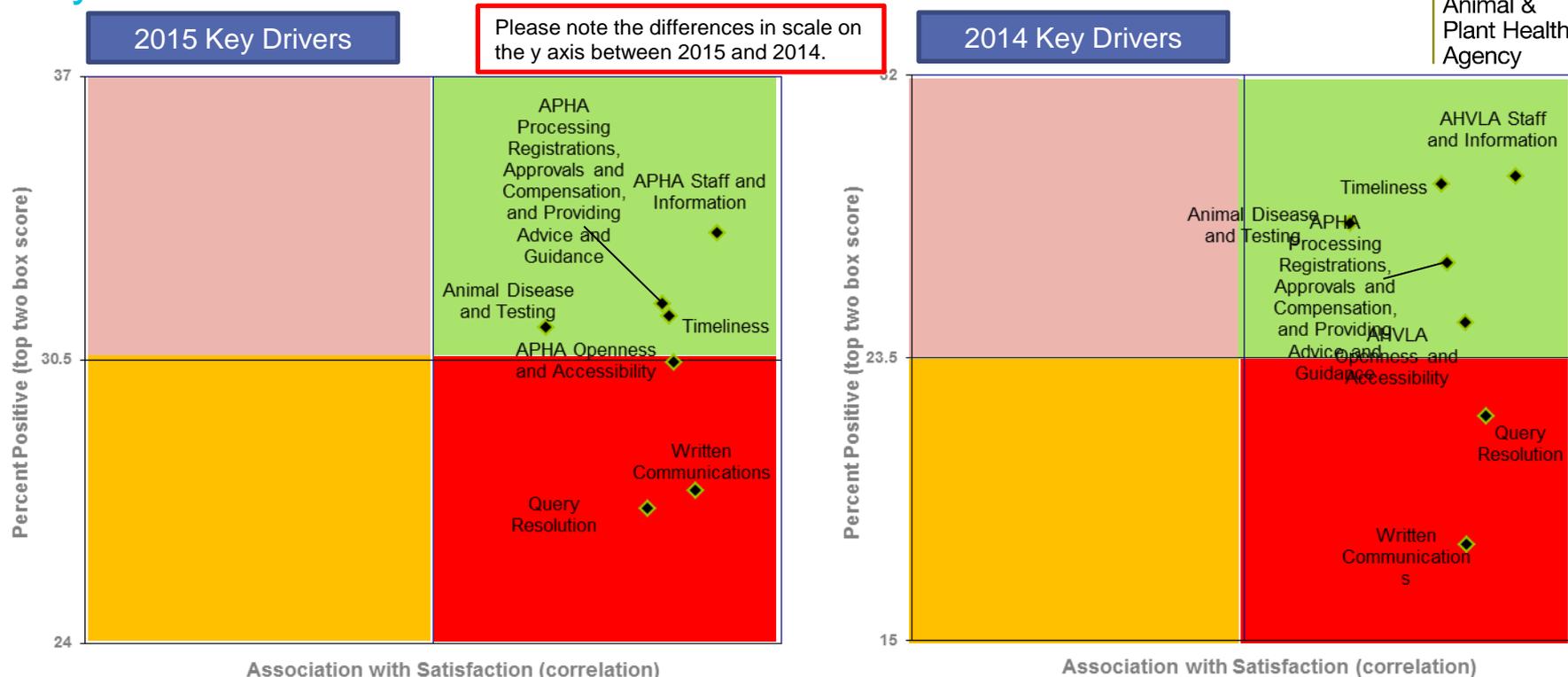
Unclear guidance

"Their guidance notes on TB regulations on livestock ... movements are very unclear."

Service is out-of-touch

"I don't feel that the service they provide is relevant to the modern farming industry. They are far too out of touch..."

Key Drivers of Overall Satisfaction



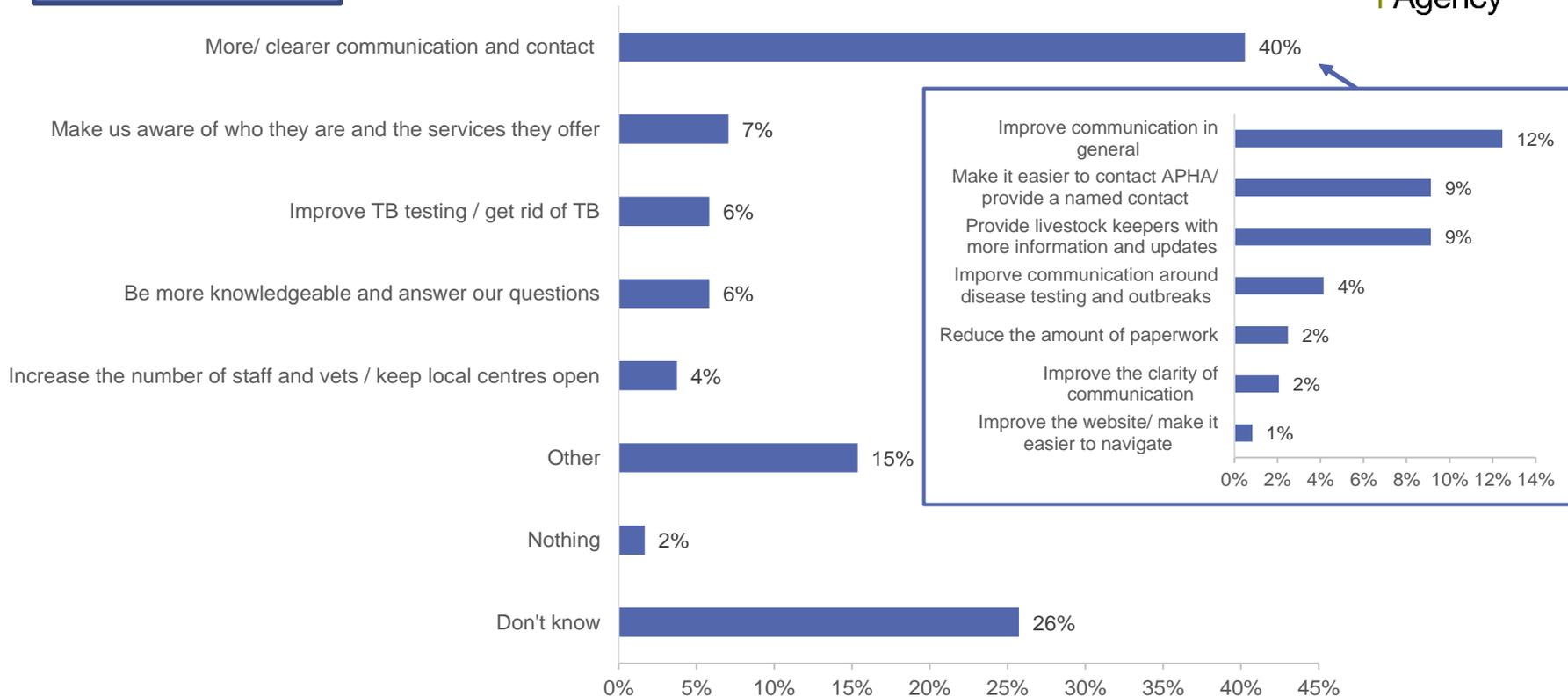
The main drivers of overall satisfaction amongst livestock keepers in 2015 were very similar to those in 2014:

- Four of the factors that were found to drive high satisfaction had higher levels of satisfaction and so were located in the 'strengths' area of the plot. These were: APHA Staff and Information; APHA Processing Registrations, Approvals and Compensation, and Providing Advice and Guidance; Timeliness; and Animal Disease and Testing. As such, these are factors that APHA can celebrate and promote.
- Three factors were found to drive overall satisfaction but had lower levels of satisfaction and so were located in the 'improvements' area of the plot. These were: APHA Openness and Accessibility; Written Communications; and Query Resolution. These are areas that APHA should look to improve if overall satisfaction with the service received from APHA is also to be improved.

Note that the positioning of factors on the quad plots are relative to each other and that the y-axis is set relatively each time. The minimum and maximum of the percentage positive scores of the variables in that model are taken and 5% added either side. The y axis is then set at these values.

Suggestions for Improvement

Improvements



60% of livestock keepers felt that APHA could improve its services. Those who thought that APHA could improve its services were asked to specify one thing that APHA could do to achieve this.

- 40% of livestock keepers felt that APHA should provide more and clearer communication and contact, of whom:
 - 12% wanted communication improved in general
 - 9% wanted it to be easier to contact APHA and requested a named contact to be provided
 - 9% wanted APHA to provide livestock keepers with more information and updates



Suggestions for Improvement: Verbatim Responses

More/ clearer communication and contact

"Provide more information about TB testing, new rules and regulations are coming in: things like advanced warning of legislation coming for animal health."

"Communication and accessibility and less delays in speaking to someone."

"They could be quicker notifying everyone that needs to be told about diseases."

"More direct communication they need to speak people more, liaising with the industry more frequently."

"Give feedback and results much quicker."

"I would like a named contact person so I can speak to the same person rather than a different person every time."

"A bit more communication, newsletters, more information."

"A bit more explanation in their findings ... put it into layman terms, explaining what my next steps should be instead of giving me the results and leaving it at that."

"Better communication with the vets who then pass the information on to the customer."

Be more knowledgeable

"Get people that know what they are talking about when answering the phone, get somebody with a bit of knowledge."

"They need to find themselves some people who know about farming."

Local centres

"Easier access to them, there's no local contact anymore, they are closing far too many local offices."

Awareness of APHA and services

"More in the farming press about the mergers to reiterate what happened and what they do."

"Make themselves more public at cattle markets and livestock shows, get themselves seen a bit, not just on the end of a phone."

Improve TB testing

"Sort out TB, if they concentrated on the wildlife and sorted that out, there wouldn't be problems with TB in cattle."

"They could come up with a TB testing scheme that works."

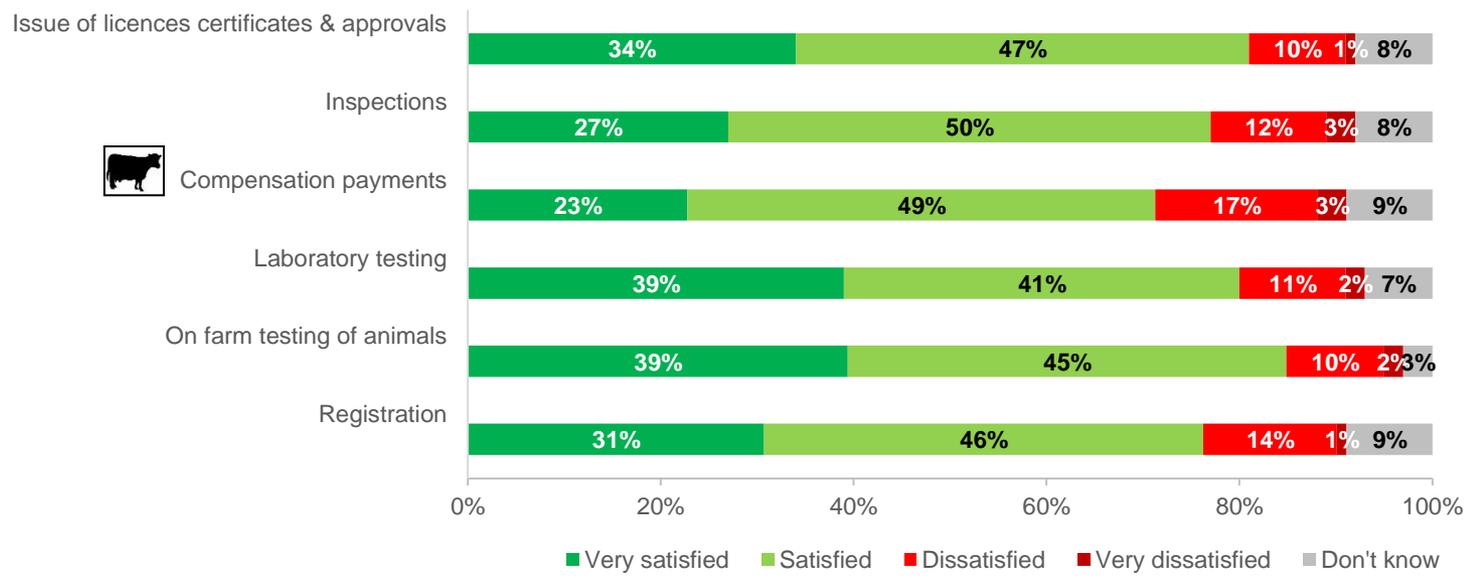


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Satisfaction with Services

Satisfaction with Livestock Keeper Services

Livestock Keeper Services



2015 Mean	2014 Mean
7.8	7.5
7.5	7.4
7.3	7.0
7.9	8.1
7.9	7.7
7.7	7.7

Again, livestock keepers with either direct or indirect experience of the areas above were asked to rate their levels of satisfaction. Satisfaction with all areas of livestock keeper services remained consistently high between 2014 and 2015. Although not significant, satisfaction with all aspects of livestock keeper services, with the exception of laboratory testing and registration, was found to have increased.

Levels of satisfaction were greatest for on-farm testing of animals (84% satisfied, mean score 7.9), and laboratory testing (81% satisfied, mean score 7.9), and lowest for compensation payments (72% satisfied, mean score 7.3).

Satisfaction with livestock keeper services was found to vary significantly by region and livestock type, but not according to livestock keepers' relationship with APHA.

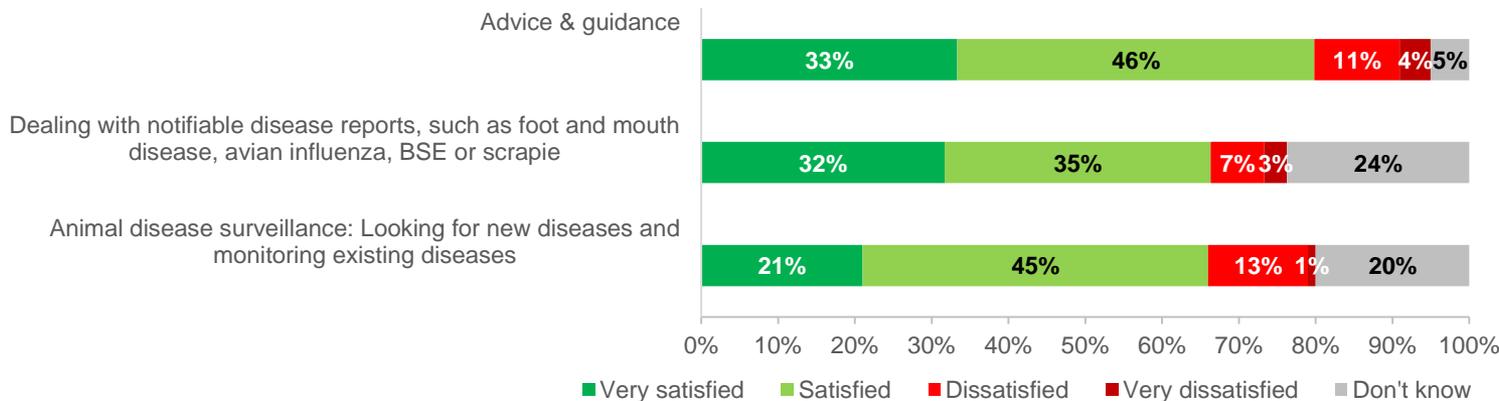
C1. Overall, how satisfied are you with this/these process(es)? Please could you give me a satisfaction rating of between 1 and 10, where 1 is not at all satisfied and 10 is extremely satisfied. Base: C1_1 Registration: 200, C1_2 On farm testing of animals: 245, C1_3 Laboratory testing: 228, C1_4 Animal disease surveillance: Looking for new diseases and monitoring existing diseases: 205, C1_5 Compensation payments: 109, C1_6 Inspections: 213, C1_7 Issue of licences certificates & approvals: 231, C1_8 Dealing with notifiable disease reports, such as foot and mouth disease, avian influenza, BSE or scrapie: 178, C1_9 Advice & guidance: 239

Satisfaction with Disease Surveillance and Notification



Animal & Plant Health Agency

Disease Surveillance and Notification



2015 Mean	2014 Mean
7.6	7.5
7.9	7.3
7.5	7.6

95% Significance

Only livestock keepers *with experience* of dealing with APHA in the areas above (either directly or via an intermediary) were asked to rate their level of satisfaction with each area on a scale of one to ten, where one was not at all satisfied and ten was extremely satisfied.

- **Dealing with notifiable diseases:** Satisfaction in this area increased significantly from a mean satisfaction score of 7.3 in 2014 to a score of 7.9 in 2015. 67% of livestock keepers with experience of dealing with APHA in this area rated themselves as satisfied, however a quarter (24%) felt unable to provide a rating.

Satisfaction was found to vary significantly by region and relationship with APHA, but not by livestock type.

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. Base: C1_4 Animal disease surveillance: Looking for new diseases and monitoring existing diseases: 205, C1_8 Dealing with notifiable disease reports, such as foot and mouth disease, avian influenza, BSE or scrapie: 178, C1_9 Advice & guidance: 239

Satisfaction with Disease Surveillance and Notification (Continued)

Verbatim

"I never hear from them. I have to drive the designation application myself. I got phoned three weeks after an outbreak."

"Keep me more up to date with control of outbreaks and any possibility of vaccinations in the area."

"Make keepers and livestock keepers aware of the services they provide."

"I get all of the information I need from the farming press."

"Keep me informed of notifiable diseases."

"We use private vets [to protect business from animal disease risks]."

"I'm a farmer, I know what [diseases] I need to protect my animals from."

"If they could send all farmers an email, more information to protect animals."

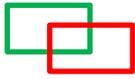
"Just updates what's happening instead of finding out after it's happened."

The proportion of livestock keepers who were unable to provide a rating for dealing with notifiable disease and animal disease surveillance did not differ significantly according to region, livestock type or whether they dealt with APHA directly or via an intermediary in these areas, however, although *not significant*:

- **Dealing with notifiable diseases:** Livestock keepers in Scotland (37%) were the most likely to feel unable to provide a rating, compared with 31% in the South East, 24% in the North, 23% in the South West and Midlands, and 11% in Wales. Horse keepers (24%) were the most likely to not provide a rating, compared with 22% of cattle and poultry/ bird keepers, 21% of sheep keepers and 12% of pig keepers. Those who dealt with APHA either only directly (28%) or both directly and via an intermediary (25%) were the most likely to not provide a rating, compared with those who only dealt with APHA via an intermediary (21%).
- **Animal disease surveillance:** Livestock keepers in the South East (33%) were the most likely to feel unable to provide a rating, compared with 26% in Scotland, 21% in the South West, 16% in the Midlands, 14% in the North and 11% in Wales. Poultry/ bird (22%) and sheep (21%) keepers were the most likely to not provide a rating, compared with 18% of cattle and horse keepers and 7% of pig keepers. The proportion of livestock keepers who felt unable to provide a rating was similar regardless of whether they dealt with APHA only directly (20%), both directly and via an intermediary (20%) or only via an intermediary (19%).

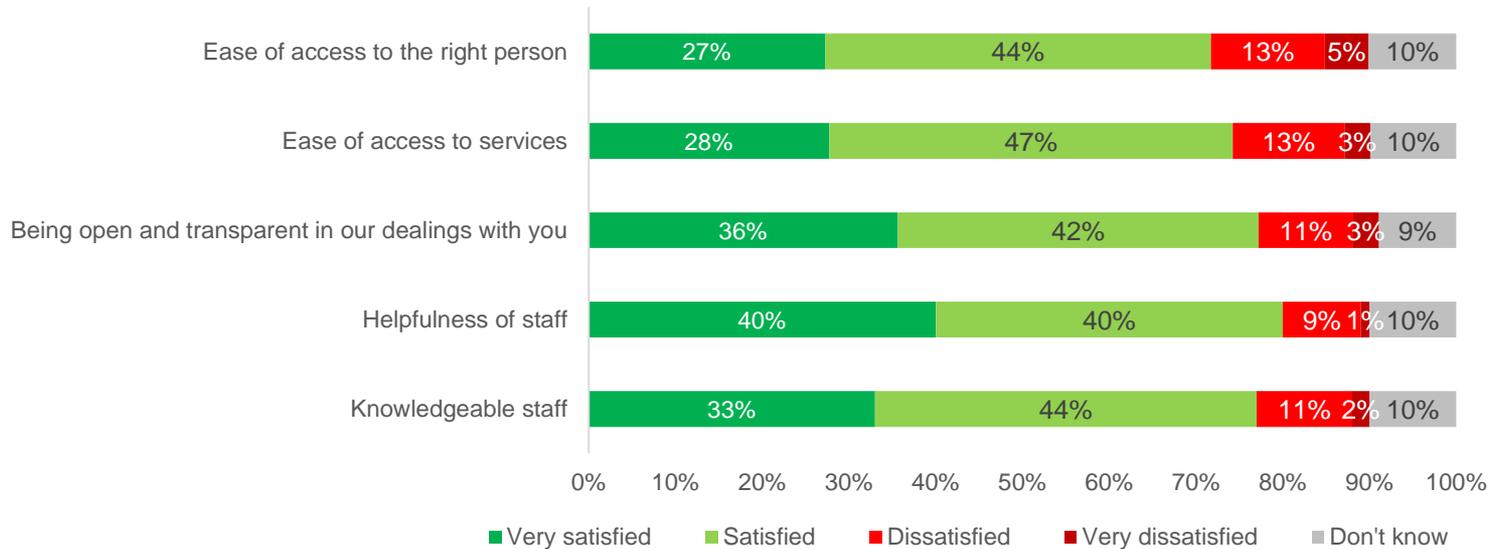
C1. Overall, how satisfied are you with this/these process(es)? Please could you give me a satisfaction rating of between 1 and 10, where 1 is not at all satisfied and 10 is extremely satisfied. Base: C1_4 Animal disease surveillance: Looking for new diseases and monitoring existing diseases: 205, C1_8 Dealing with notifiable disease reports, such as foot and mouth disease, avian influenza, BSE or scrapie: 178, C1_9 Advice & guidance: 239; E2. What were the main reasons you were dissatisfied with the service from APHA? Base: 24; E4a. What one thing could APHA do to improve its service? Base: 241; F1a. What information do you feel you need to help you protect your business from animal disease risks? Base: 35; F1b. What information do you feel you need to help you protect your cattle from bovine TB? Base: 55

Satisfaction with APHA Staff, Timings and Access



95%
Significance

Satisfaction with APHA Staff, Timings and Access



2015 Mean	2014 Mean
7.3	-
7.5	7.5
7.8	7.6
8.1	8.0
7.7	7.7

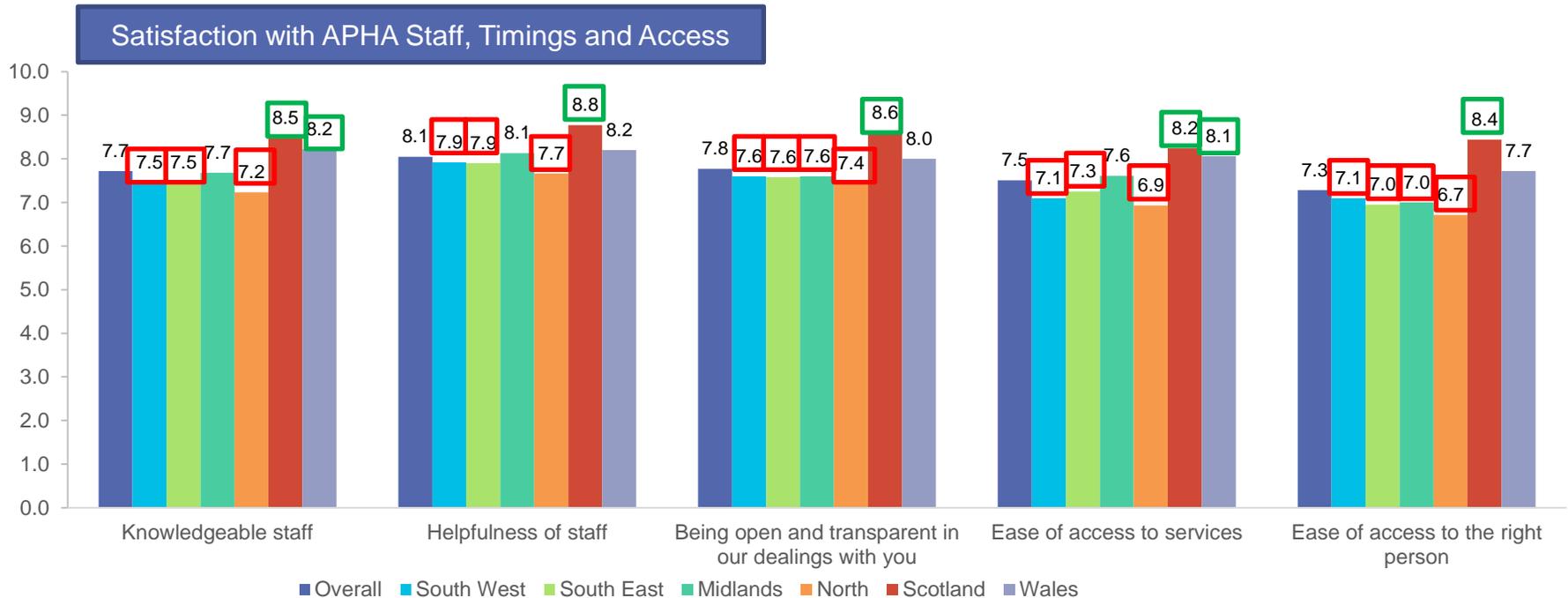
Although not significant, satisfaction with the openness and transparency of APHA and the helpfulness of staff was found to have increased between 2014 and 2015.

Satisfaction with APHA staff, timings and access was high with around three quarters of current APHA service users satisfied with each factor. Satisfaction levels were highest for the helpfulness of APHA staff, with a mean satisfaction score of 8.1 and 80% of livestock keepers rating themselves as satisfied, whilst satisfaction was lowest for the ease of access to the right person (mean satisfaction score: 7.3; 71% satisfied).

Satisfaction with APHA staff, timings and access was found to vary significantly by region, but not by relationship with APHA or livestock type.

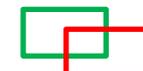
C3 And based on your experience how satisfied would you say you are with APHA's performance against these factors? Base: C3_1 Knowledgeable staff: 285, C3_2 Helpfulness of staff: 285, C3_5 Being open and transparent in our dealings with you: 285, C3_7 Ease of access to services: 285, C3_9 Providing information that is relevant to you and your business: 285, C3_10 Ease of access to the right person: 285

Satisfaction with APHA Staff, Timings and Access: By Region



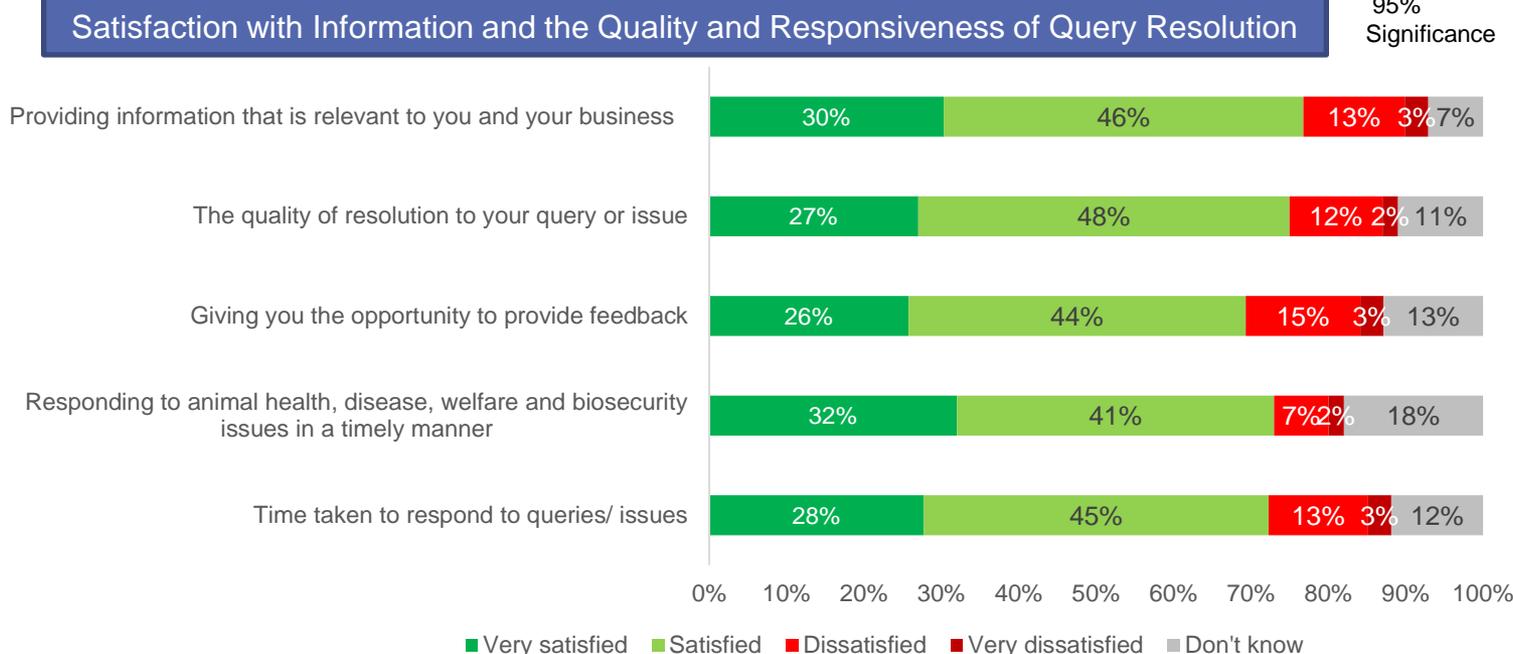
- **Knowledgeable staff:** Livestock keepers in Scotland (8.5) and Wales (8.2) were significantly more satisfied than those in the South West (7.5), South East (7.5) or North (7.2).
- **Helpfulness of staff:** Livestock keepers in Scotland (8.8) were significantly more satisfied than those in the South West (7.9), South East (7.9) and North (7.7).
- **Being open and transparent:** Livestock keepers in Scotland (8.6) were significantly more satisfied than those in England (South East, South West & Midlands: 7.6; North: 7.4).
- **Ease of access to services:** Livestock keepers in Scotland (8.2) and Wales (8.1) were significantly more satisfied than those in the South West (7.1), South East (7.3) and North (6.9).
- **Ease of access to the right person:** Livestock keepers in Scotland (8.4) were significantly more satisfied than those in England (South West: 7.1; South East & Midlands: 7.0; North: 6.7).

Satisfaction with Information and the Quality and Responsiveness of Query Resolution



95% Significance

2015 Mean	2014 Mean
7.6	7.7
7.6	7.5
7.3	7.2
7.9	7.8
7.5	7.5



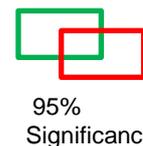
Levels of satisfaction with information and the quality and responsiveness of query resolution remained in line with those of the 2014 survey. Although not significant, it was found that satisfaction increased for the quality of query resolution, the opportunity to provide feedback and responding to animal health, disease, welfare and biosecurity issues in a timely manner, but decreased for the provision of relevant information.

Satisfaction levels amongst livestock keepers were highest for the quality of resolution to your query or issue (mean satisfaction score: 7.6; 75% satisfied) and responding to animal health, disease, welfare and biosecurity issues in a timely manner (mean score: 7.9; 73% satisfied). Satisfaction levels were lowest for giving livestock keepers the opportunity to provide feedback (mean score: 7.3; 70% satisfied).

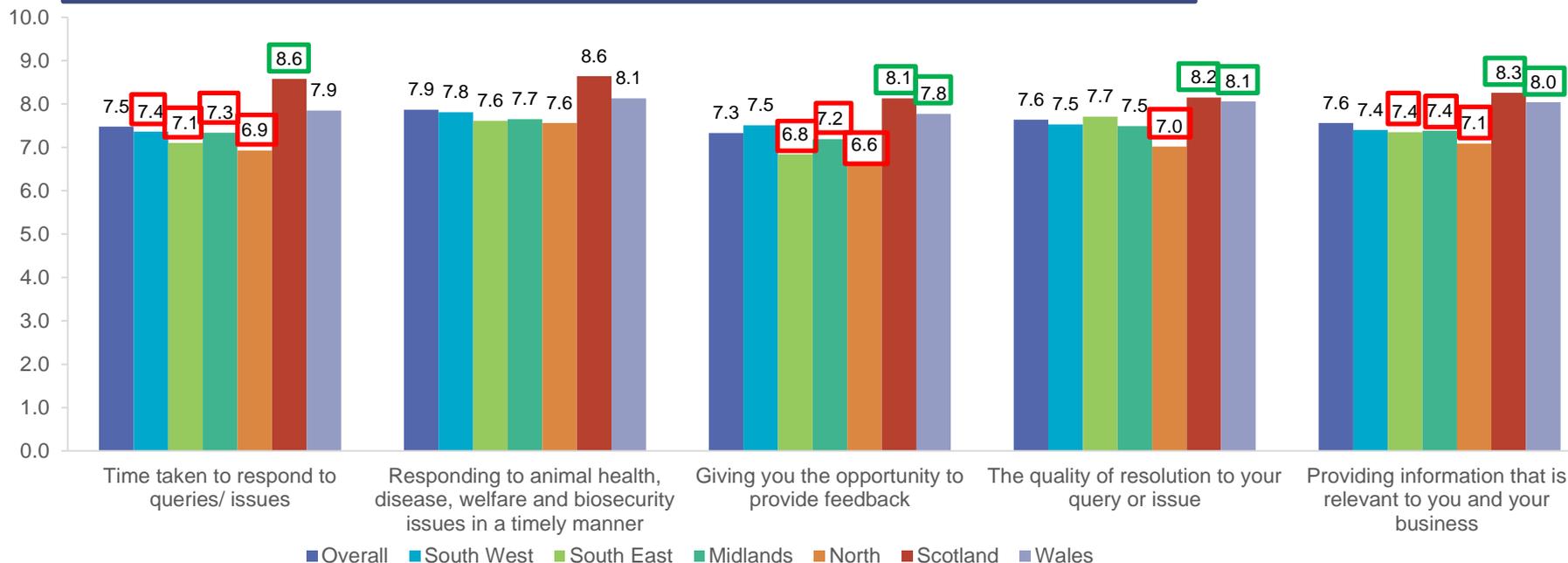
Satisfaction with information and the quality and responsiveness of query resolution was found to vary significantly by region and relationship with APHA, but not livestock type.

C3 And based on your experience how satisfied would you say you are with APHA's performance against these factors? Base: C3_3 Time taken to respond to queries/ issues: 285, C3_4 Responding to animal health, disease, welfare and biosecurity issues in a timely manner: 285, C3_6 Giving you the opportunity to provide feedback: 285, C3_8 The quality of resolution to your query or issue: 285.

Satisfaction with Information and the Quality and Responsiveness of Query Resolution: By Region



Satisfaction with Information and the Quality and Responsiveness of Query Resolution



- **Time taken to respond to queries/ issues:** Livestock keepers in Scotland (8.6) were significantly more satisfied than those in England (South West: 7.4; South East: 7.1; Midlands: 7.3; and North: 6.9).
- **Giving you the opportunity to provide feedback:** Livestock keepers in Scotland (8.1) and Wales (7.8) were significantly more satisfied than those in the South East (6.8), Midlands (7.2) and North (6.6).
- **The quality of resolution to your query or issue:** Livestock keepers in Scotland (8.2) and Wales (8.1) were significantly more satisfied than those in the North of England (7.0).
- **Providing information that is relevant:** Livestock keepers in Scotland (8.3) and Wales (8.0) were significantly more satisfied than those in the South East (7.4), Midlands (7.4) and North (7.1).

C3 And based on your experience how satisfied would you say you are with APHA's performance against these factors? Base: C3_3 Time taken to respond to queries/ issues: 285, C3_4 Responding to animal health, disease, welfare and biosecurity issues in a timely manner: 285, C3_6 Giving you the opportunity to provide feedback: 285, C3_8 The quality of resolution to your query or issue: 285.



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Perceptions of APHA

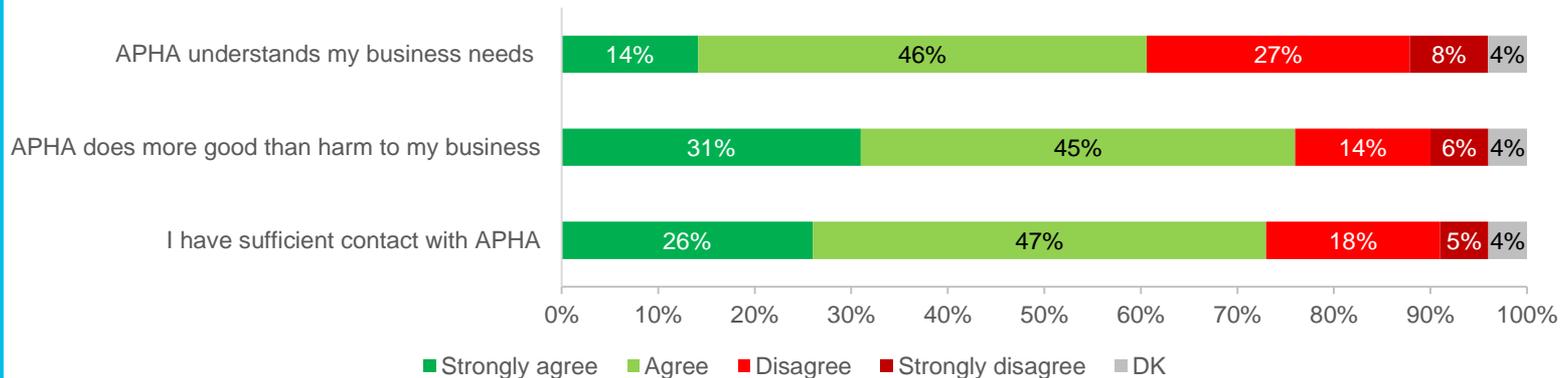
Perceptions of APHA: Contact and Understanding



Animal & Plant Health Agency

95% Significance

Perceptions of APHA: Contact and Understanding



2015 Mean	2014 Mean
6.3	6.7
7.4	7.7
7.2	7.5

Perceptions of APHA decreased when compared to the findings from the previous 2014 survey. In particular:

- **Understanding business needs:** Livestock keepers who agreed that APHA understood their business needs decreased significantly from a mean agreement score of 6.7 in 2014 to a mean score of 6.3 in 2015. Although in 2015 the majority (61%) of livestock keepers agreed that APHA understood their business needs, over a third (35%) disagreed.
- **APHA does more good than harm:** Agreement that APHA did more good than harm decreased amongst livestock keepers from a mean agreement score of 7.7 in 2014 to a mean score of 7.4 in 2015. Three quarters (76%) of livestock keepers in 2015 agreed with the statement, whilst a fifth (20%) disagreed.

Perceptions of APHA were found to vary significantly by region and relationship with APHA, but not by livestock type.

Perceptions of APHA: Contact and Understanding (Continued)

APHA understands my business needs

"I don't feel that the service they provide is relevant to the modern farming industry they are far too out of touch."

"The lack of knowledge of the people you speak to when you ring up for help and guidance."

"Give more helpful advice with regards to my particular circumstance."

"The reasons they implement decision making and understanding of farmers financial business and how their decisions affect the finances of famers."

"Staff can only read from protocol and not use common sense."

"Extend their hours, don't just work from 9-5 because farmers never do."

"Get people that know what they are talking about when answering the phone, get somebody with a bit of knowledge."

APHA does more good than harm to my business

"They don't listen when you tell them something. You report things to them then you get a letter saying you haven't done this or that."

"You used to be able to talk sense, and if you had one shed with TB you could sell animals on another farm. Now once your down your down, nobody wants to listen."

"Unhelpful attitude in resolving issues. They are very keen on telling you have broken the law rather than helping you, there is an aggressive nature to the delivering of information."

"Just constant change Defra failing to take responsibility for anything and passing onto a nameless agency to hide behind geographically... people don't have adequate responsibility to make decisions, they are just left spouting the usual unhelpful line."

"I don't think they do anything for animal health."

"Misinformation, indecision, not being able to contact, not being able to consult people, being told one thing by one person, one thing by another. Lackadaisical attitude, a complete lack of understanding of what implications there are on farm through APHA restriction."

"We are looking for a pragmatic approach to assistance onsite rather than regulations being thrown at us, general welfare issues or related to animal health and welfare."

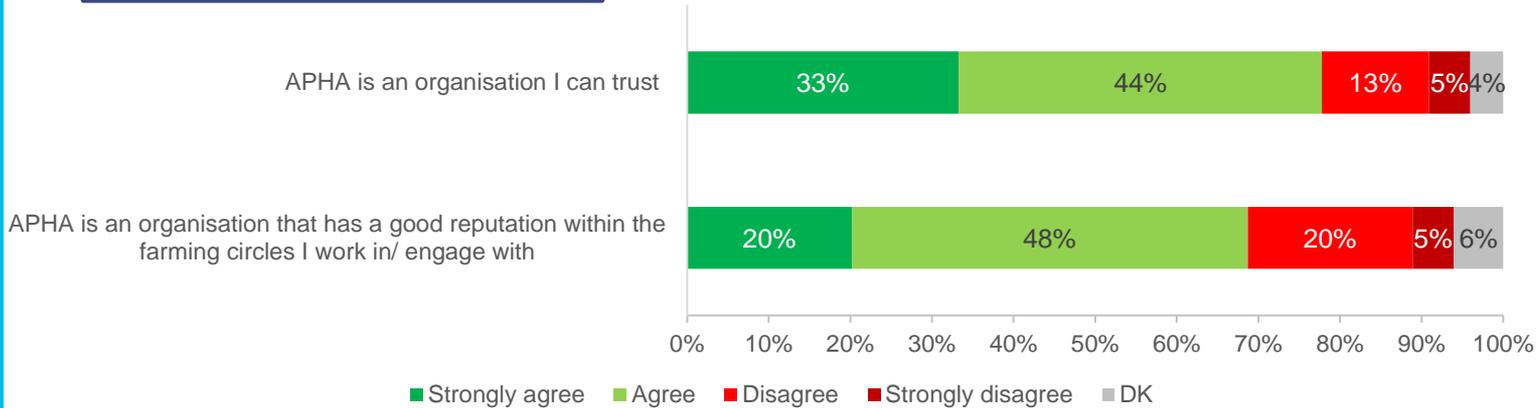
"Listen to people and don't prejudge issues as we know more than they do."

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: F1_3 I have sufficient contact with APHA: 401, F1_5 APHA does more good than harm to my business: 401, F1_6 APHA understands my business needs: 401; E2. What were the main reasons you were dissatisfied with the service from APHA? Base: 24; E4a. What one thing could APHA do to improve its service? Base: 241



Perceptions of APHA: Reputation

Perceptions of APHA: Reputation



2015 Mean	2014 Mean
7.5	7.8
6.8	6.6

95%
Significance

77% of livestock keepers agreed that APHA was an organisation that they could trust, whilst 18% disagreed. Agreement remained consistent with the previous survey findings (mean agreement scores: 7.5 in 2015; 7.8 in 2014). A quarter (25%) of livestock keepers disagreed that APHA had a good reputation within the farming circles they worked in, whilst 69% agreed. Again, agreement remained consistent with the previous survey findings (mean agreement scores: 6.8 in 2015; 6.6 in 2014).

Perceptions of APHA were found to vary significantly by region and relationship with APHA, but not by livestock type.

Verbatim

- "Spread the word about themselves."
- "A higher profile amongst the industry."
- "Be more visible, make people aware of their existence and what they do."
- "Make themselves more public at cattle markets and livestock shows, get themselves seen a bit, not just on the end of a phone."
- "In terms of awareness within the farming industry, who they are and what they do."

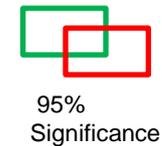
F1 To what extent do you agree / disagree with the following statements? Please score on a scale of 1 to 10 where 1 is strongly disagree and 10 is strongly agree. F1_4 APHA is an organisation I can trust : 401, F1_7 APHA is an organisation that has a good reputation within the farming circles I work in/ engage with: 401; E4a. What one thing could APHA do to improve its service? Base: 241



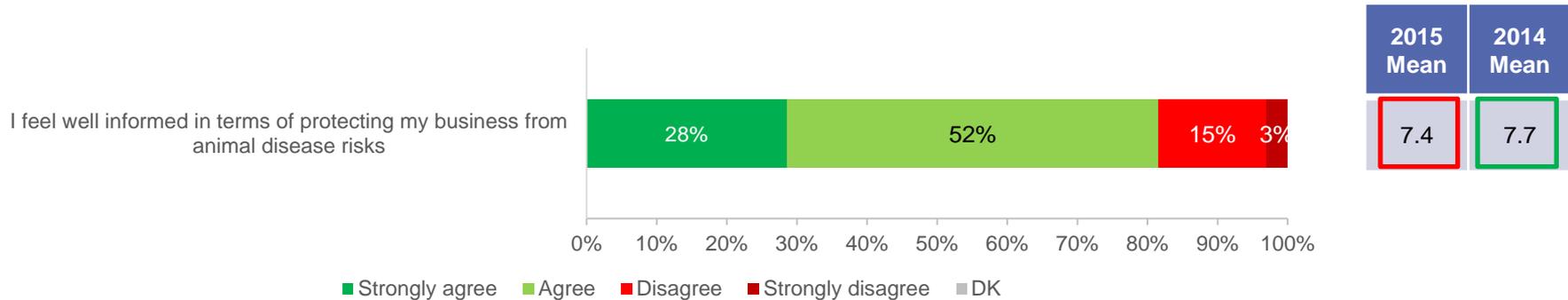
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Protecting business from animal disease risks

Perceptions of APHA: Protecting Business from Animal Disease Risks



Perceptions of APHA: Protecting Business from Animal Disease Risks

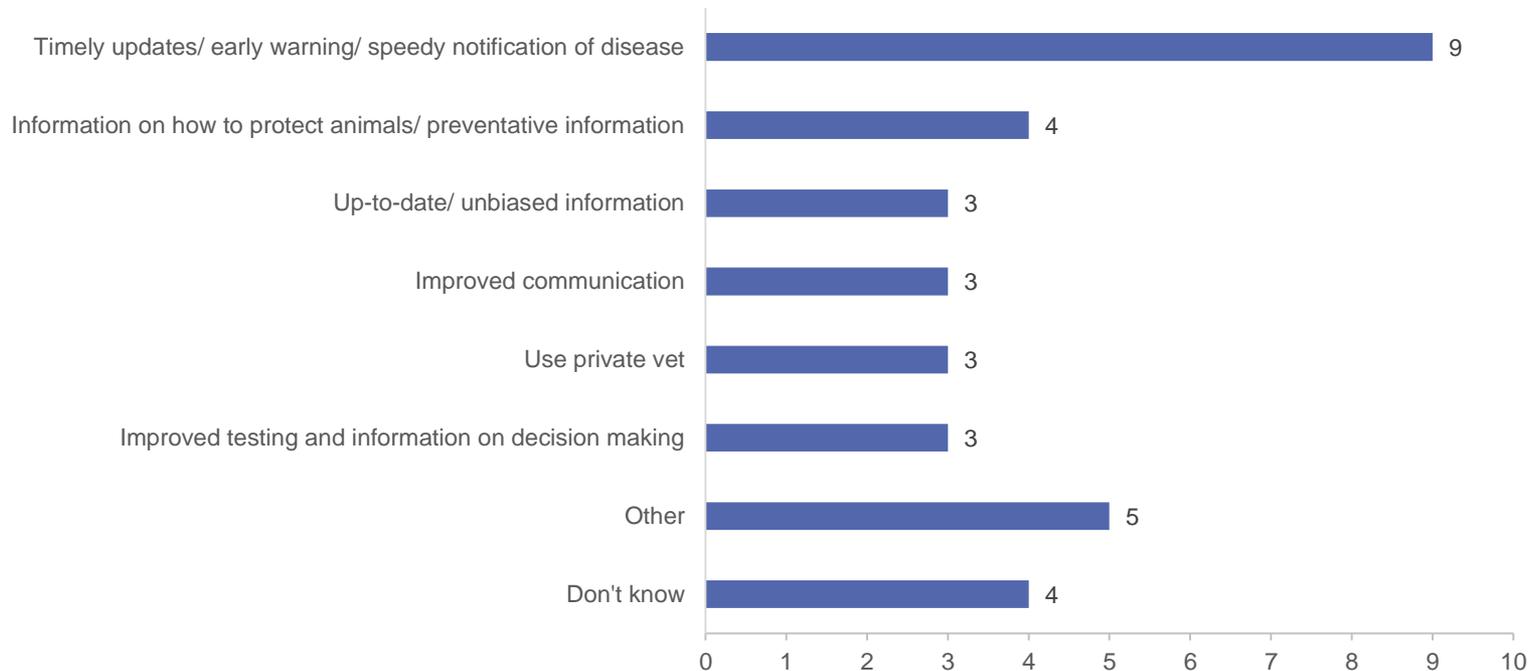


Agreement with the statement 'I feel well informed in terms of protecting my business from animal disease risks' decreased between 2014 and 2015: a mean agreement score of 7.7 was calculated for 2014; whilst this decreased to 7.4 in 2015. Although in 2015 the majority (81%) of livestock keepers agreed that they felt well informed in terms of protecting their business from animal disease risks, a fifth (19%) did not feel well informed. When differences in mean agreement were looked at by sub-group, this was found to differ significantly by region only:

- Livestock keepers in Wales (7.9) were significantly more likely to agree that they felt well informed in terms of protecting their business from animal disease risks than those in the South West (6.9).
- Whether or not livestock keepers agreed that they felt well informed about protecting their business from animal disease risks did not vary by livestock type or livestock keepers' relationship with APHA.

Protecting Business from Animal Disease Risks: Suggestions

Protecting Business from Animal Disease Risks



Livestock keepers who felt ill informed about how to protect their business from animal disease risks were asked what information they felt they needed to feel more informed. Nine livestock keepers felt that they needed early warning of diseases, whilst four requested more preventative information. Three livestock keepers each felt they needed more up-to-date information and improved communication.

Protecting Business from Animal Disease Risks: Suggestions: Verbatim Comments

Timely updates/ early warning

"Just updates what's happening instead of finding out after it's happened."

"Precise and timely information, wider circulation of information to different organisations."

"Email at the first outbreak when its getting within 30 or 40 miles."

Information on how to protect animals

"If they could send all farmers an email ... more information to protect animals. They should text local vet to inform all farmers."

Information on control of the disease for non farming sectors and scientific information for protection against badgers."

Up-to-date information

"Up to date unbiased information. It depends on the disease you can have."

Improved communication

"To be better informed ... better communication."

Improved testing/ decision making

"The reasons they implement decision making and understanding of farmers financial business and how their decisions affect the finances of famers."

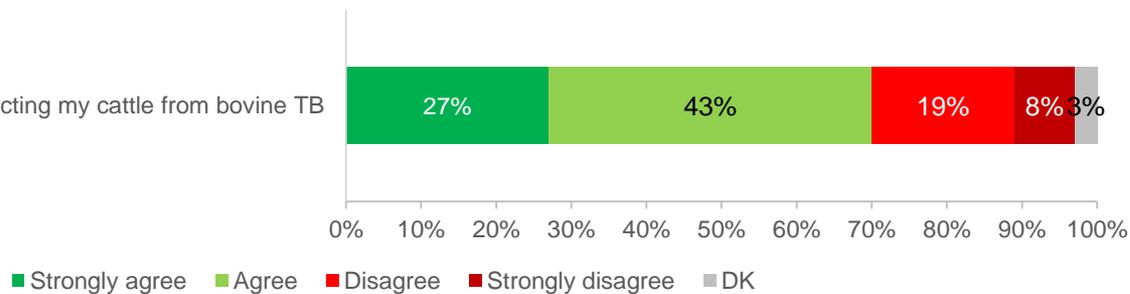
Perceptions of APHA: Protecting Cattle from Bovine TB



Perceptions of APHA: Protecting Cattle from Bovine TB



I feel well informed in terms of protecting my cattle from bovine TB

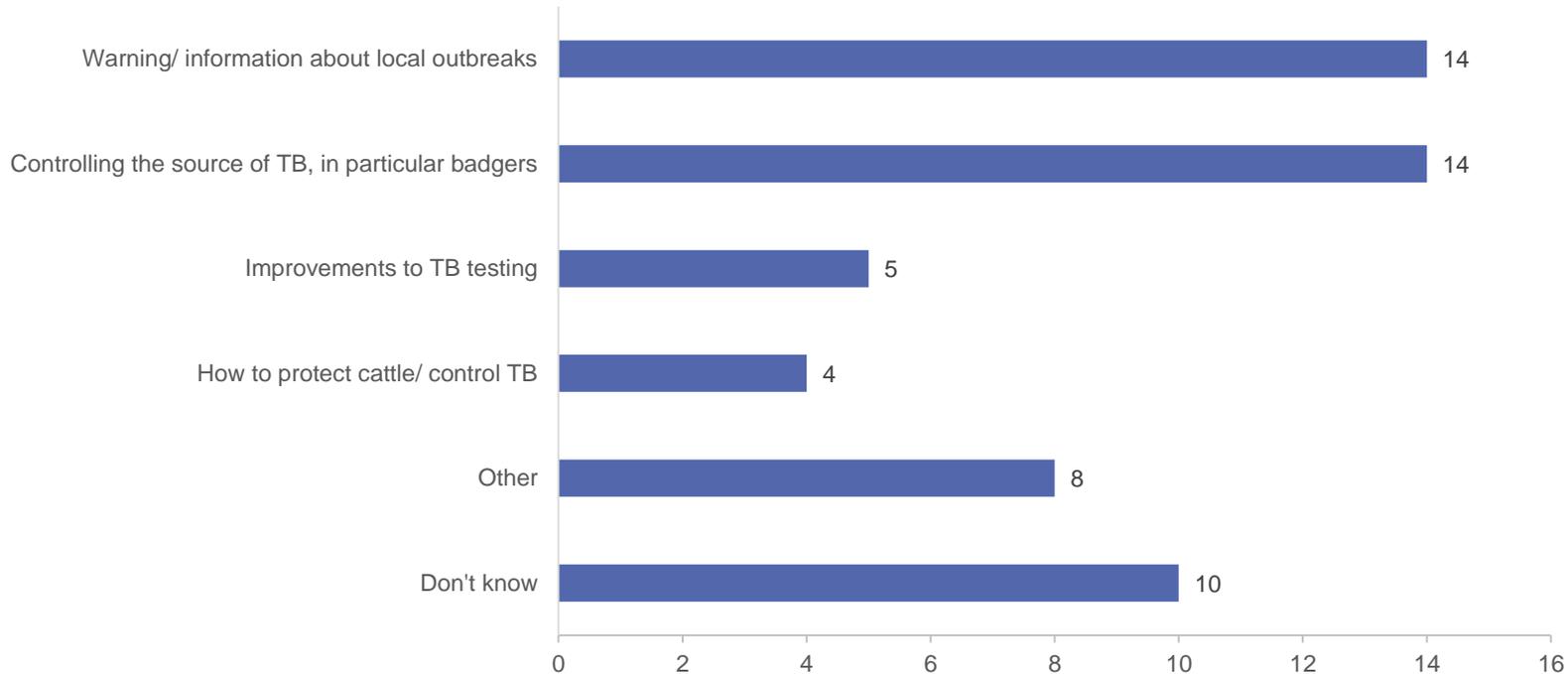


2015 Mean	2014 Mean
6.8	-

Cattle keepers were asked to what extent they agreed that they felt well informed in terms of protecting their cattle from Bovine TB. Whilst 70% of cattle keepers agreed that they felt well informed, 27% disagreed.

Protecting Cattle from Bovine TB: Suggestions

Protecting Cattle from Bovine TB



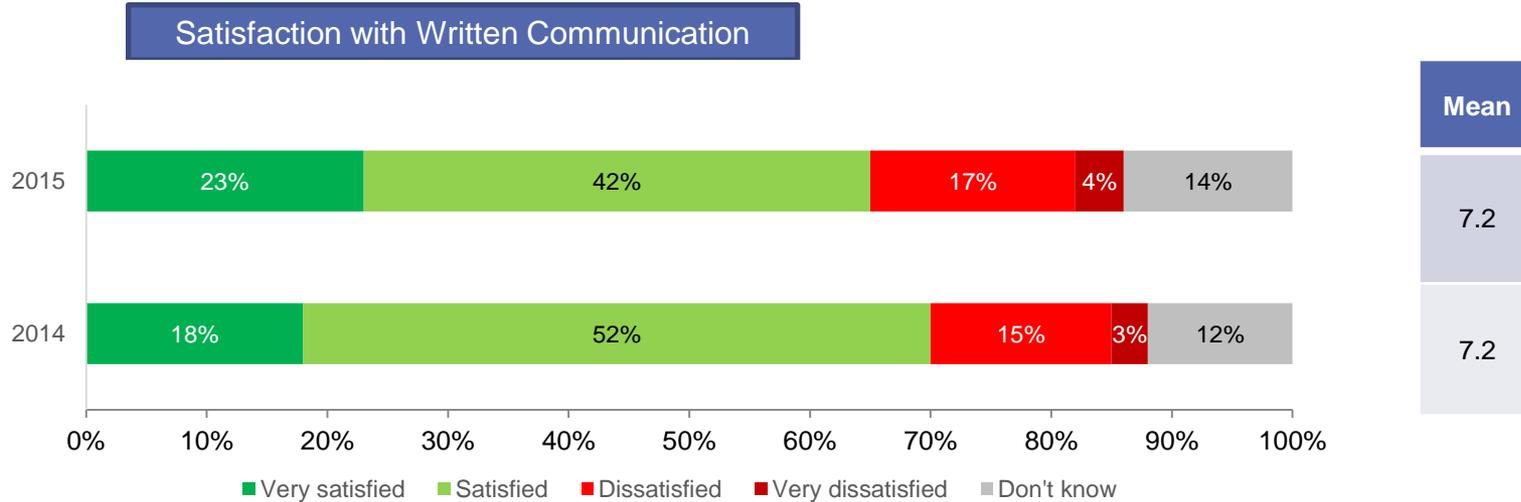
Cattle keepers who felt ill informed about how to protect their cattle from Bovine TB were asked what information they felt they needed. The two main forms of information were found to be warning about local outbreaks (suggested by 14 cattle keepers) and controlling the source of TB, in particular badgers (suggested by 14 cattle keepers).



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Communication

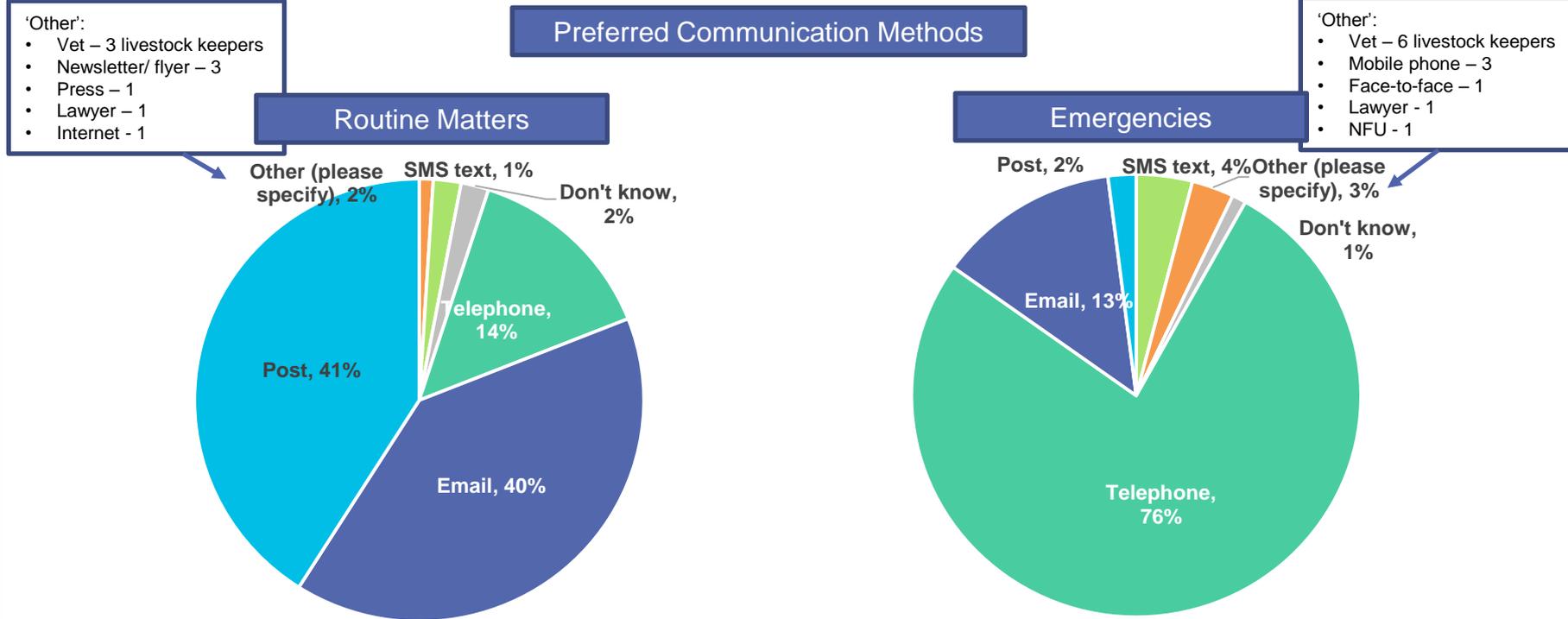
Satisfaction with Written Communication



When asked how satisfied they were with written communication, two thirds (65%) of livestock keepers described themselves as satisfied, whilst a fifth (21%) stated that they were dissatisfied. This was in line with the 2014 survey results with the mean satisfaction score remaining constant at 7.2. Satisfaction with written communication was found to be consistent regardless of region, livestock type or relationship with APHA.

Preferred Communication Methods

Preferred Communication Methods



All livestock keepers were asked to state their preferred method of communication for both routine matters and emergencies. Post (41%) and email (40%) were the most popular forms of communication for routine matters, whilst for emergencies over three quarters (76%) of livestock keepers preferred to be contacted via telephone.

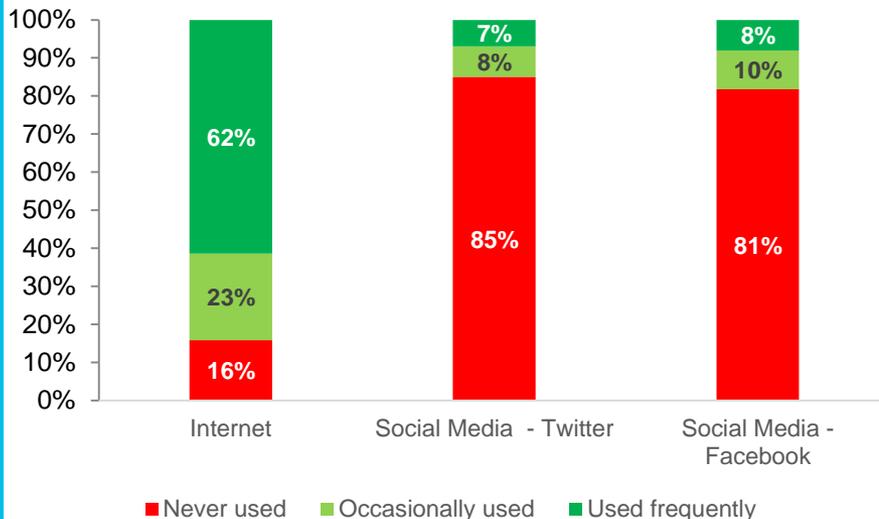
In line with the digital by default agenda, preference for routine communication by email was looked at by sub-group. It was found that those in the South East (51%) and Midlands (46%) were significantly more likely to prefer communication via email than those in Wales (28%); whilst pig keepers (60%) were significantly more likely to prefer to be contacted by email than cattle (36%) or sheep (34%) keepers.

In addition, the proportion of livestock keepers who preferred to be contacted by email for routine matters in 2015 (40%) represented a significant increase when compared to the findings in 2014 where 33% of livestock keepers selected this option.

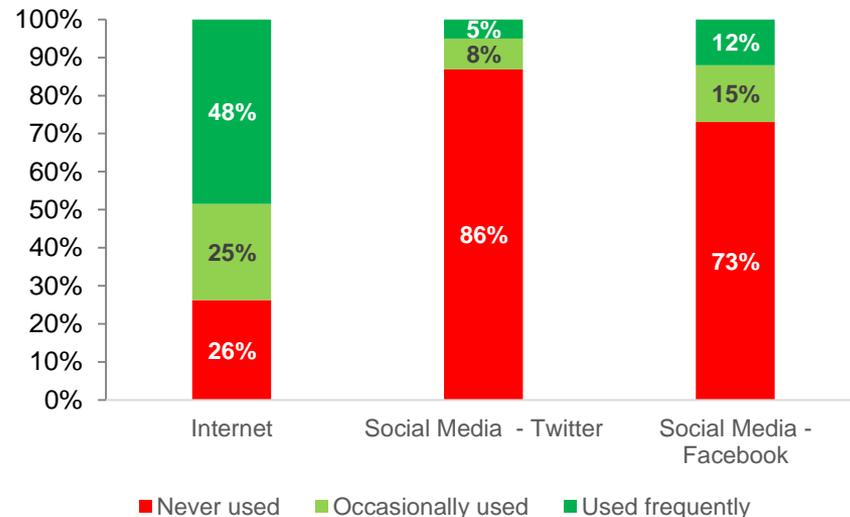
Use of the Internet



Use of the Internet: Farming Business



Use of the Internet: Social



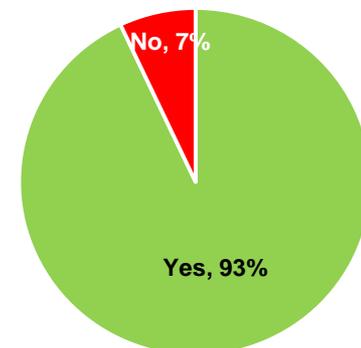
The majority (93%) of livestock keepers had access to the internet.

When asked whether they used the internet for farming business or social purposes it was found that although the majority of livestock keepers used the internet (farming business: 85%; social: 73%), the use of social media including Twitter (farming business: 15%; social: 13%) and Facebook (farming business: 18%; social: 27%) was far lower.

The proportion of livestock keepers who never used the internet for farming business differed by sub-group. Livestock keepers in Wales (25%) were found to be significantly more likely to *never* use the internet for farming business than those in all other regions (South West: 11%; South East: 10%; Midlands: 12%; Scotland: 10%) with the exception of the North of England (22%).

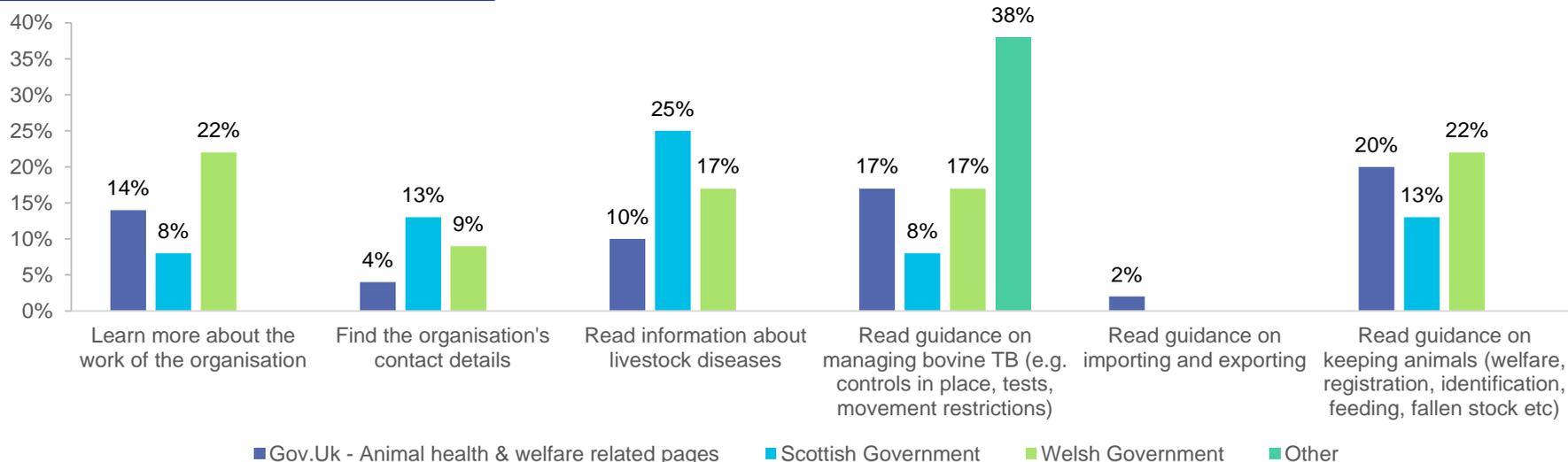
Sheep keepers (19%) were found to be significantly more likely to *never* use the internet for farming business than pig keepers (7%); whilst those who dealt with APHA via an intermediary (23%) were significantly more likely to *never* use the internet for farming business than those who dealt with APHA directly (9%).

Access to the Internet



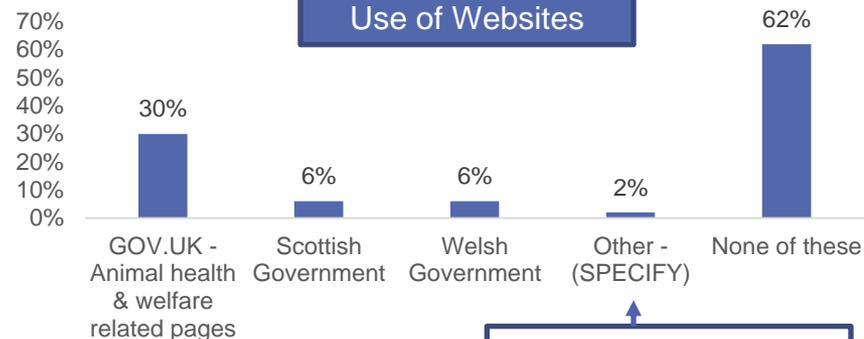
Website Usage and Reasons

Main Reasons for Visiting Websites



All livestock keepers were asked to specify whether they had visited a number of websites in the last six months. Those who had visited one or more website were then asked their main reasons for visiting. It was found that 62% of livestock keepers hadn't visited any of the websites listed. Livestock keepers who dealt with APHA via an intermediary (69%) were significantly more likely to have *not* visited any websites than those who dealt with APHA directly (54%).

The most popular website was the animal health and welfare-related pages on GOV.UK and had been visited by a third (30%) of those who took part in the 2015 survey. The main reason for using GOV.UK was to read guidance on keeping animals (20%).



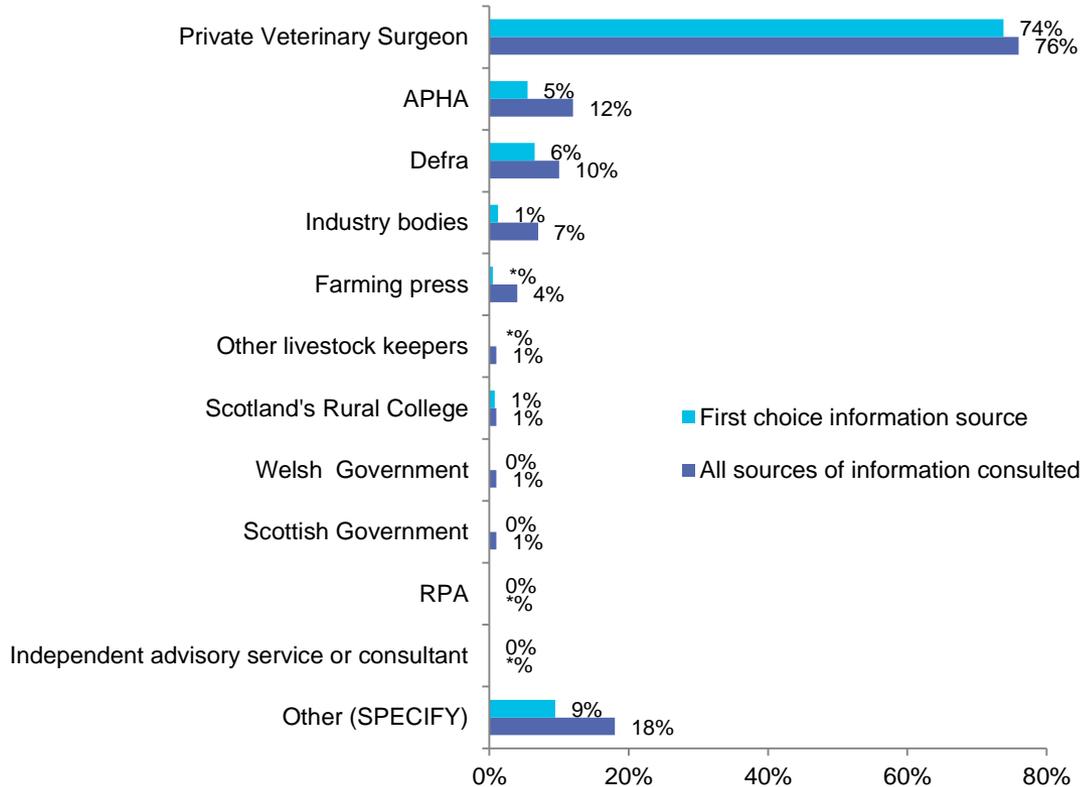
- 'Other':
- BCMS – 2 livestock keepers
 - Defra – 4
 - Farm Assured – 1
 - TB Support Groups – 1
 - BBC News Archive - 1

D2. Have you visited any of the following websites in the last 6 months in order to obtain information and/ or advice on animal health advice and welfare related issues? READ OUT Base: 401; D3. What were the main reasons for visiting these websites? Base: 153



Sources of information and advice

Sources of Information and Advice



'Other' Verbatim

- "I get rules and regulations sent to me and the TB test is sent to me."
- "Agent."
- "Freedom Foods, Red Tractor, Co-op Welfare Scheme."
- "RSPCA."
- "Farm Assurance Scheme."
- "Newsletters, neighbours, events."

All livestock keepers were asked where they normally sought information and advice on animal health and welfare related issues. Those who provided more than one organisation were asked which one was their first choice. Just over three quarters (76%) of livestock keepers sought advice from a private veterinary surgeon; for just under three quarters (74%) of livestock keepers, this was their only or first choice.

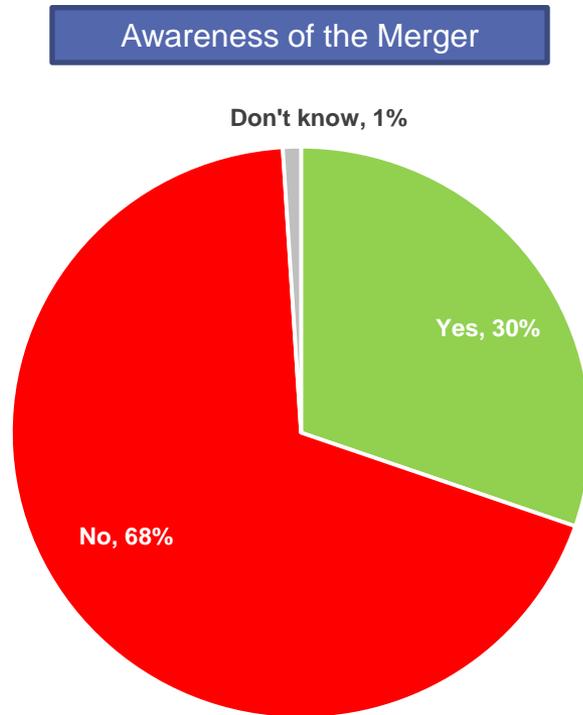
D1 Firstly, from which organisations do you normally seek information and/ or advice on animal health advice and welfare related issues? Base: 401; D1a Which of these organisations would usually be your first choice when seeking information and /or advice on animal health and welfare related issues? Base: 101



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Awareness

Awareness of the merger: Overall



Verbatim

“More in the farming press about the mergers to reiterate what happened and what they do.”

“To be a bit better known as I don't know much about them and I didn't realise they had changed to APHA.”

“Put something in Farmers Weekly to say who they are, I never had notification for all these changes.”

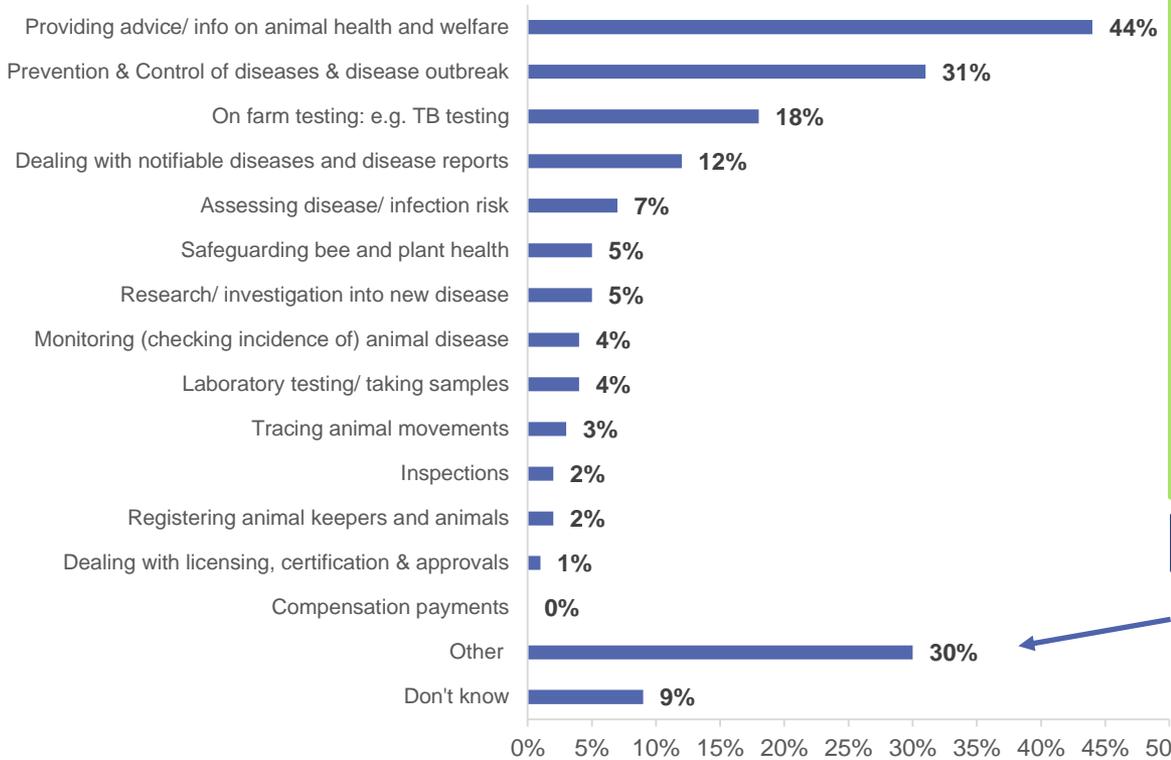
30% of livestock keepers were aware of the merger between Animal Health and Veterinary Laboratories Agency (AHVLA) and parts of the Food and Environment Research Agency (FERA) to create the Animal and Plant Health Agency (APHA).

Awareness of the merger varied significantly by region and livestock type, but not by livestock keepers' relationship with APHA (i.e. whether they dealt with the Agency directly or via an intermediary).



Awareness of APHA's Responsibilities

Responsibility of APHA



'Other' Verbatim

"Welfare issue and how the animals are treated."

"Enforce regulations."

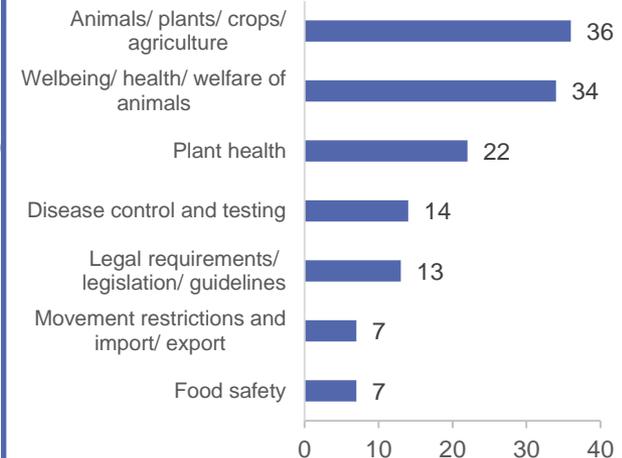
"National bio security, isolation units."

"Safety of the food to the consumer."

"What they're feeding to the animals."

"Everything! Maintain health and welfare of livestock within the UK in making sure we stay disease free. Quarantine controls, etc."

Other Responses



When asked what they would say APHA was responsible for, 'providing advice/ information on animal health and welfare' (44%) and the 'prevention and control of diseases and disease outbreak' (31%) were the most frequently cited responsibilities.



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Conclusions and Areas for Action

Conclusions - 1

- Overall satisfaction in 2015 remained in line with satisfaction levels in both 2014 and 2012. Satisfaction with APHA's processes and services, including written communication also remained consistent with previous findings. A number of (both significant and non-significant) increases were observed, however, some perceptions of APHA decreased significantly:
 - Agreement that APHA understands livestock keepers' business needs decreased between 2014 and 2015. 35% of livestock keepers disagreed with this statement in 2015
 - The perception that APHA does more good than harm to livestock keepers' businesses decreased between 2014 and 2015; 20% of livestock keepers disagreed with this in 2015.
- Key Driver Analysis suggests that the three factors that APHA need to continue to improve to drive up high overall satisfaction with the services provided by APHA were as follows:
 1. APHA Openness and Accessibility, consisting of:
 - Being open and transparent in our dealings with you
 - Ease of access to services
 - Giving you the opportunity to provide feedback
 - Ease of access to the right person
 2. Written Communications, consisting of:
 - Satisfaction with APHA's written communication
 3. Query Resolution, consisting of:
 - The quality of resolution to your query or issue

Note that satisfaction with each of the aspects within these factors either remained constant or increased (although not significantly) in 2015 when compared with the previous 2014 survey.
- It can be seen that these issues all broadly relate to communications. With the exception of satisfaction with APHA's written communication, livestock keepers in all four regions of England were found to have lower levels of satisfaction than those in Scotland and, to a lesser extent, Wales. Satisfaction with communications was also higher amongst those who access APHA via an intermediary than those who accessed APHA directly. Dissatisfaction with communications was reflected in verbatim comments.

Conclusions - 2

- The survey found that:
 - Post and email were the most popular forms of communication for routine matters and were suggested by two fifths of livestock keepers respectively, whilst for emergencies over three quarters of livestock keepers preferred to be contacted via telephone.
 - Over 90% of livestock keepers had access to the internet and 85% stated that they used the internet to conduct farming business. However, only a third of livestock keepers had accessed the animal health and welfare related pages of gov.uk within the last six months to obtain information and advice.
 - Despite this, for three quarters of livestock keepers, their primary source of information was a private veterinary surgeon.

Areas for Action

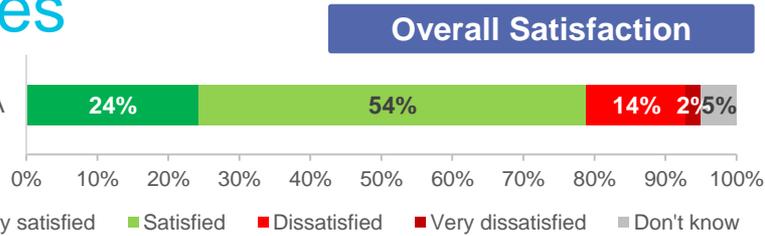
Area for Action	Suggestions
Written Communication	<ul style="list-style-type: none"> • Keep livestock keepers informed of APHA's services and issues that may affect them. Consider regular communication in the form of postal or email newsletters. • In addition, consider further communications regarding the merger between AHVLA and FERA, highlighting APHA's responsibilities. Awareness of the merger is currently low and requests for information explaining who APHA are and the services they offer was apparent in verbatim responses. Increasing awareness of APHA and the services offered may also help increase the reputation of the Agency within farming circles and could be used to inform livestock keepers of the different terminology used.
Query Resolution and Accessibility	<ul style="list-style-type: none"> • Ensure that service users are aware of the sources of information available to them, including web-based sources, as well as the channels through which they can contact APHA. • Consider the training of customer-facing staff or subject specialists to ensure that they have sufficient knowledge of farming and livestock keeping to answer any queries service users may have.
Digital By Default	<ul style="list-style-type: none"> • High levels of internet access and usage, combined with a relatively high proportion of livestock keepers requesting routine information via email, indicates that more services and information could be provided online. • Publicise the fact that APHA information is now on GOV.UK and encourage livestock keepers to access this channel. • It was found that the majority of livestock keepers preferred to receive notification of urgent issues, in particular those concerning TB and the spread of disease, via the telephone. This is an issue that would need to be addressed if APHA is to move towards communication via digital methods and is something that livestock keepers will need to be aware of.
Direct/ Intermediary Variations	<ul style="list-style-type: none"> • Liaise with stakeholders to understand the high levels of satisfaction amongst livestock keepers who access services via an intermediary, in order to inform best practice. Use the lessons learnt to improve satisfaction amongst direct users. • Consider further working with intermediaries, in particular private vets, to disseminate information and raise awareness of APHA and the services provided.
Regional Variations	<ul style="list-style-type: none"> • Consider conducting further research into why Welsh and, in particular, Scottish livestock keepers consistently demonstrate the highest levels of satisfaction. Focus group research could be utilised to inform best practice and apply the lessons learnt to those in the regions of England.



Appendix: Overview of Satisfaction

Satisfaction with Services

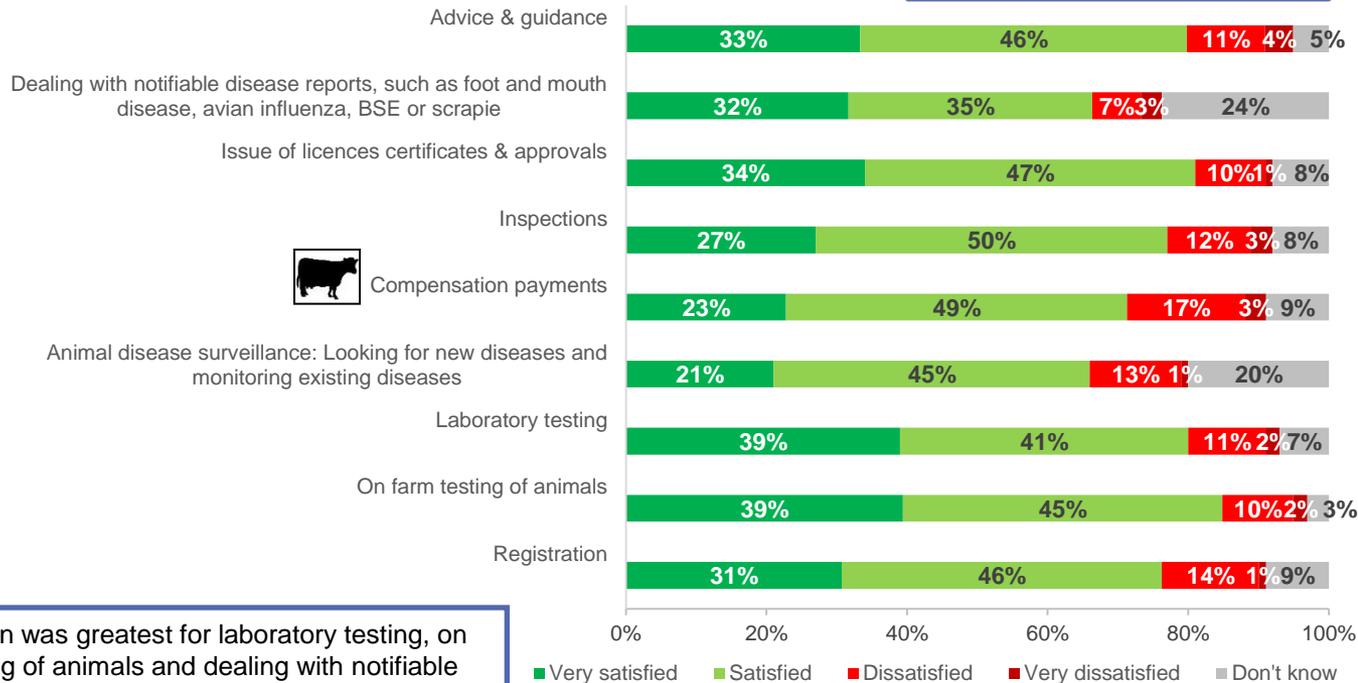
Overall satisfaction with the service you receive from APHA



2015 Mean	2014 Mean
7.4	7.4

Satisfaction with the majority of APHA's services in 2015 remained consistent with 2014 findings, with the exception of dealing with notifiable disease reports where satisfaction has significantly increased.

APHA Processes



2015 Mean	2014 Mean
7.6	7.5
7.9	7.3
7.8	7.5
7.5	7.4
7.3	7.0
7.5	7.6
7.9	8.1
7.9	7.7
7.7	7.7

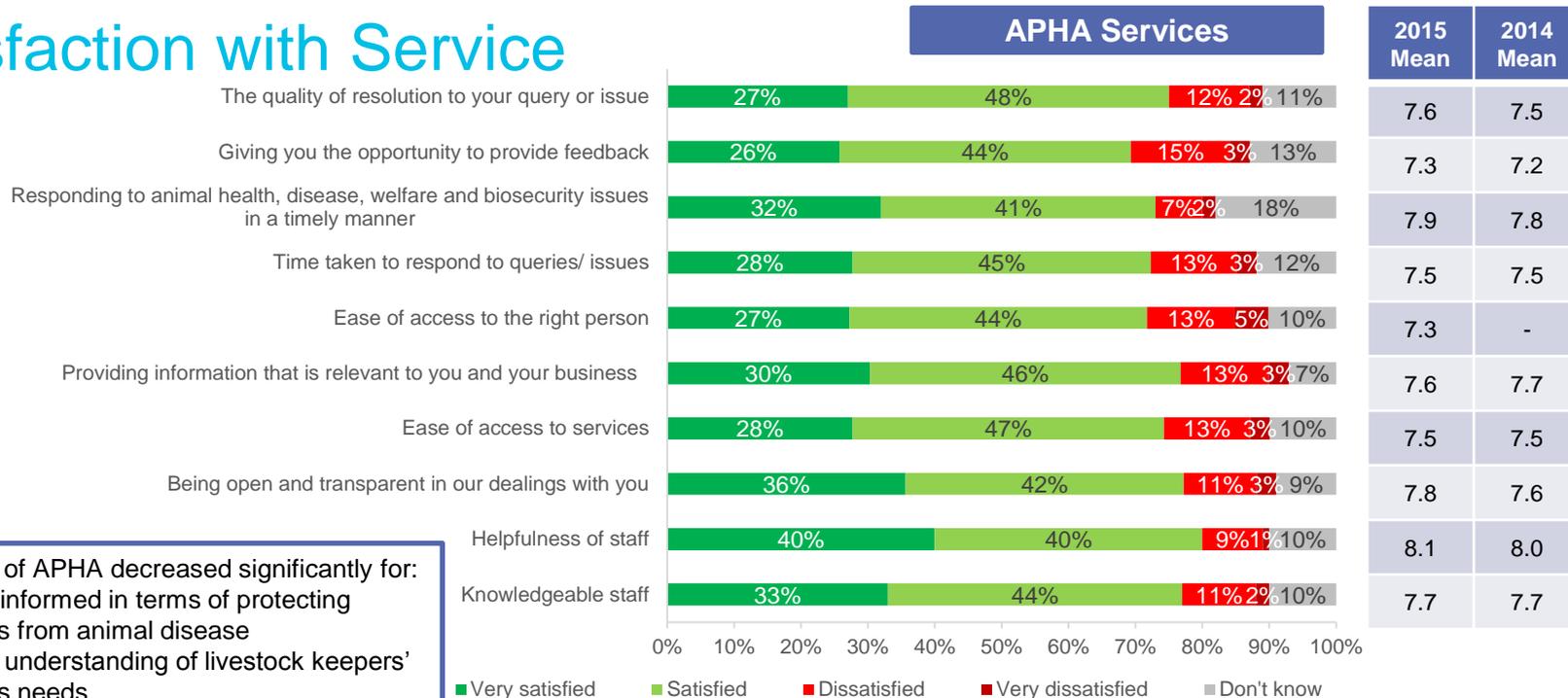
Satisfaction was greatest for laboratory testing, on farm testing of animals and dealing with notifiable disease reports. Satisfaction was lowest for APHA's written communication.

Written Communication



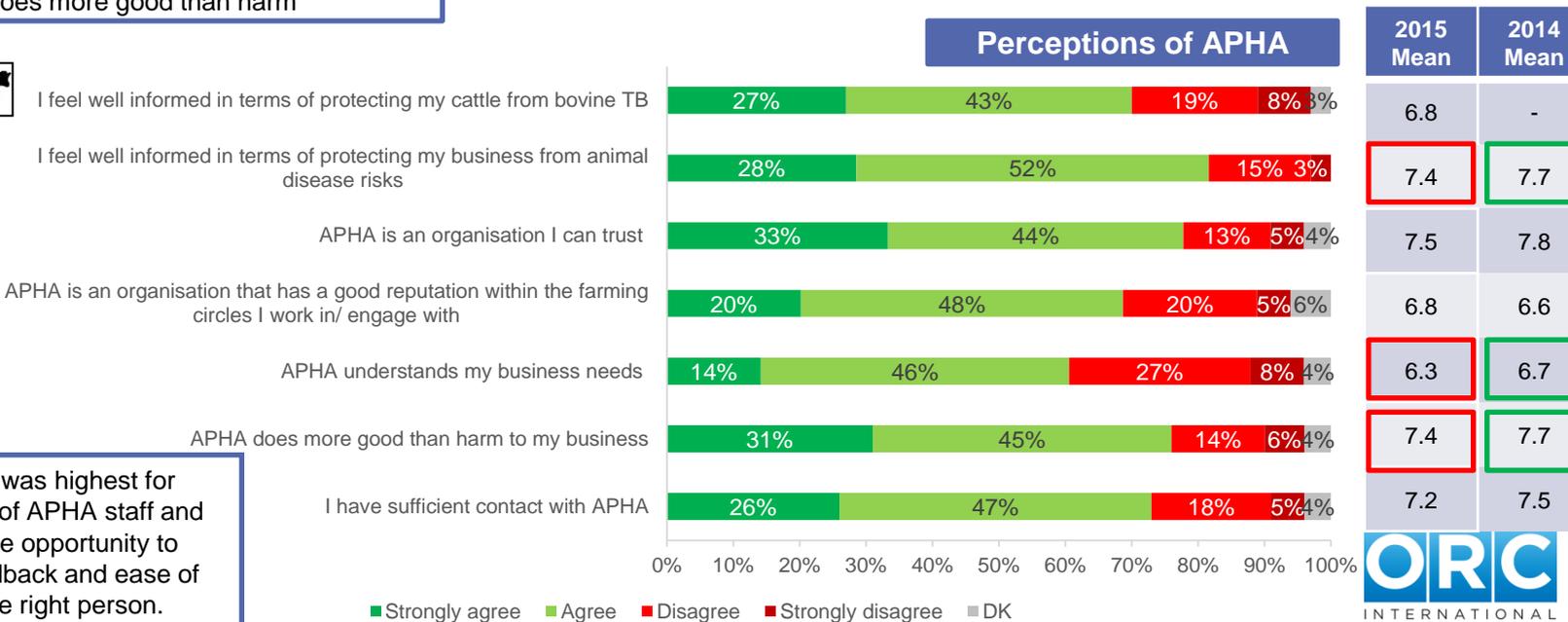
2015 Mean	2014 Mean
7.2	7.2

Satisfaction with Service



Perceptions of APHA decreased significantly for:

- Feeling informed in terms of protecting business from animal disease
- APHA's understanding of livestock keepers' business needs
- APHA does more good than harm



Satisfaction was highest for helpfulness of APHA staff and lowest for the opportunity to provide feedback and ease of access to the right person.