

GIEG/HAL PROJECT - INDUSTRY SURVEY 2006

INDICATIVE RESULTS as at 30th September 2006

**GENERAL SURVEY STATISTICS**

Total from NGIA File	1405
Kmart Extras	34
<b>Total</b>	<b>1439</b>

<b>Target Population</b>	<b>1373</b>
<b>Kmart Extras</b>	<b>34</b>
Duplicates	29
Struck out	3
<b>Total</b>	<b>1439</b>

Email replies	136	64.2%
Fax Replies	21	9.9%
Phone replies	18	8.5%
Postal Replies	32	15.1%
Focus Group Trial	5	2.4%
<b>Total replies</b>	<b>212</b>	<b>100.0%</b>

ACT	0	0.0%
NSW	48	22.6%
NT	3	1.4%
QLD	41	19.3%
SA	23	10.8%
TAS	14	6.6%
VIC	67	31.6%
WA	16	7.5%
<b>Total replies</b>	<b>212</b>	<b>100.0%</b>

<b>Sample Size</b>	<b>212</b>
<b>Target Population</b>	<b>1407</b>
<b>Sample % of Population</b>	<b>15.07%</b>

Questions	Options	% of Responses	Response Count	% Responses ranked option as 1st Choice	Average for the category
<b>SECTION 1</b>					
Q1: Which of the following categories would you say primarily describes the services/offering of your organisation?	Landscapers	2%	4		
	Re-vegetation	2%	5		
	Plant Hire	0%	0		
	Garden Service	0%	1		
	Garden Supplies	3%	6		
	Retail Nursery	27%	57		
	<b>Wholesale Nursery</b>	<b>52%</b>	<b>111</b>		
	Discount Department Store	1%	2		
	Hardware	1%	2		
	Supermarkets	0%	1		
	Allied Trader (including Fast Moving Packaged Goods)	5%	11		
	Propagation	7%	14		
	Other	8%	18		
Q2: How many full-time staff (or equivalent on average through the year) do you have?	<b>0 - 4</b>	<b>35%</b>	<b>74</b>		
	5 - 9	23%	49		
	10 - 19	20%	42		
	20 - 49	16%	33		
	50 - 99	4%	9		
	100+	2%	4		
Q3: Do you sell to multi-store buyers (i.e. >10 outlets, eg. Kmart, Bunnings, BigW, Mitre10, etc.)?	YES	42%	88		
	<b>NO</b>	<b>58%</b>	<b>122</b>		
Q4: If you selected "YES" in Q3, what percentage of your sales turnover (dollar value) do they comprise?	< 20%	12%	25		
	20% - 50%	13%	28		
	<b>&gt; 50%</b>	<b>17%</b>	<b>35</b>		
Q5: What is the AVERAGE (indicative) number of purchase orders you SEND in a month to your suppliers?	Retail Nursery				67
	Wholesale Nursery				45
	Allied Trader (including Fast Moving Packaged Goods)				93
	Propagation				22
Q6: What is the AVERAGE (indicative) number of purchase orders you RECEIVE in a month from your customers?	Retail Nursery				227
	Wholesale Nursery				141
	Allied Trader (including Fast Moving Packaged Goods)				280
	Propagation				198
Q7: Please provide a rough estimate of the AVERAGE number of line items per order.	Retail Nursery				25
	Wholesale Nursery				102
	Allied Trader (including Fast Moving Packaged Goods)				24
	Propagation				23
Q8: Does your organisation currently send or receive EDI documents ?	YES	30%	64		
	<b>NO</b>	<b>67%</b>	<b>141</b>		
Q9: If you selected "YES" in Q8, is the EDI integrated into your backend systems?	YES	17%	37		
	NO	12%	26		
<b>SECTION 2</b>					
Q10: What do you use your fax machine(s) for? (including fax via PC) (Top 3 responses requested for this question.)	send catalogue information / stock availability	57%	121	46%	
	receive catalogue information / stock availability	56%	118	37%	
	send purchase order	50%	107	30%	
<b>No. of responses with rankings for Qn. 10 = 210</b>	<b>receive purchase order</b>	<b>62%</b>	<b>132</b>	40%	
	send delivery advice	17%	36	9%	
	receive delivery advice	14%	29	10%	
	send invoice	25%	53	17%	
	receive invoice	18%	38	14%	
	send credits	11%	24	9%	
	receive credits	11%	24	9%	
	send remittance	22%	46	16%	
	receive remittance	20%	42	11%	
	Other	12%	26	8%	
Q11: How many PCs do you have in the workplace? (including Home Office)	0	1%	3		
	1	22%	47		
	<b>2 - 5</b>	<b>53%</b>	<b>113</b>		
	6+	23%	48		
Q12: If you selected "0" in Q11, are you planning to purchase a computer for your business within the next 12 months?	YES	0%	1		
	NO	1%	3		
Q13: If you selected more than one in Q11, are your PCs networked?	YES	58%	122		
	NO	18%	39		
Q14: What do you use your PC(s) for? (Top 4 responses requested for this question.)	<b>email communication</b>	<b>94%</b>	<b>200</b>	46%	
	office accounting / payroll (internal)	89%	189	69%	
	internet banking	73%	155	31%	
<b>No. of responses with rankings for Qn. 14 = 209</b>	send catalogue information / stock availability	49%	103	22%	
	receive catalogue information / stock availability	39%	83	22%	
	send / receive transactions electronically	38%	81	21%	
	faxing	22%	47	13%	
	Other	17%	37	11%	

Questions	Options	% of Responses	Response Count	% Responses ranked option as 1st Choice	Average for the category
Q15: Do you have dialup and/or broadband internet access?	YES	95%	202		
	NO	3%	7		
<b>SECTION 3</b>					
Q16: What PC Platform(s) are you currently using, or planning to purchase (if you do not currently have any PCs)?	Mackintosh	4%	8		
	Windows 98	16%	33		
	Windows 2000	16%	34		
	Windows XP	82%	174		
	Windows NT	5%	11		
	Other	3%	6		
Q17: What applications are you currently using for Order Entry / Despatch / Invoicing?	MYOB	46%	97		
	Quickbooks	16%	34		
	AccPac	<1%	1		
	Access	7%	14		
	ERP (SAP, Oracle)	1%	2		
	In-house developed application	16%	33		
	Nursery Management System	3%	6		
	Excel & Word	2%	5		
	Sybiz	2%	5		
	Arrow Financials	2%	4		
	Attache	1%	3		
	Other (all different)	15%	31		
<b>SECTION 4</b>					
Q18: How are products identified in the purchase orders you send?	Plant name / product description	80%	170		
	Internal product/part number (SKU)	29%	61		
	GTIN (= EAN number) at EACH level	16%	33		
	GTIN (= EAN number) at EACH level and BOX level	1%	2		
Q19: How are products identified in the purchase orders you receive?	Plant name / product description	84%	179		
	Internal product/part number (SKU)	20%	42		
	GTIN (= EAN number) at EACH level	13%	28		
	GTIN (= EAN number) at EACH level and BOX level	1%	2		
Q20: What percentage of your products is GS1 (EAN) bar-coded?	0%	49%	104		
	< 20%	22%	46		
	20% - 50%	12%	26		
	> 50%	14%	29		
Q21: Do you scan any GS1 (EAN) bar codes?	YES (despatch / pricing)	7%	14		
	YES (receivng)	8%	18		
	YES (selling, i.e. at POS)	11%	24		
	NO	82%	173		
<b>SECTION 5</b>					
Q22: Do you maintain price / product catalogue information on your PC?	YES	81%	172		
	NO	17%	36		
Q23: Do you maintain inventory/availability information on your PC?	YES	63%	133		
	NO	35%	75		
<b>SECTION 6</b>					
Q24: Do you have an in-house IT resource to support your IT systems?	YES	30%	63		
	NO	68%	144		
Q25: If you outsource, what IT functions are outsourced?	PC software upgrades (including new software)	44%	93		
	PC hardware upgrades	44%	93		
	PC ongoing support/maintenance	50%	106		
	Networking / Communications	33%	69		
	Other	7%	14		
Q26: When are you planning to: (Now=0; 1yr=1; 3yr=3; Never=N)					
	<b>No. of responses selecting "Now" or "1 Yr" for Qn. 26 = 143</b>				
	<b>% that will do something now or in 1 year's time</b>				
	Upgrade systems	68%			
	Implement a new system e.g. scan packing	27%			
	Train staff in IT skills	66%			
	Bring in additional IT skills in-house	23%			
<b>SECTION 7</b>					
Q27: Which of the following benefits do you see as being able to achieve in your business by doing electronic trading (Business to Business, B2B)?	enhance customer service	50%	107	25%	
	increase sales	39%	83	22%	
	decrease costs	41%	86	19%	
	labour saving	45%	96	21%	
	decrease errors (re-keying errors)	27%	58	12%	
	decrease stock holdings	11%	24	5%	
	increase efficiency	66%	140	34%	
	better staff satisfaction	11%	24	4%	
	improved stock management	35%	75	17%	
	receive payments faster	33%	69	16%	
	stay in business	22%	47	13%	
	increase market share	21%	44	11%	
	stronger business relationship with key trading partner	36%	77	17%	
	competitive advantage	27%	58	11%	
	<b>(Top 5 responses requested for this question.)</b>				
	<b>No. of responses with rankings for Qn. 27 = 209</b>				

Questions	Options	% of Responses	Response Count	% Responses ranked option as 1st Choice	Average for the category
	no benefits	9%	20	8%	
	Other	3%	6	1%	
Q28: What do you think are the barriers in your business to the implementation of B2B? (i.e. if you are currently not trading electronically with your trading partners, why not) ?	lack of knowledge / understanding	58%	124	37%	
	lack of industry standards	48%	101	21%	
	lack of resources (money, time)	55%	117	24%	
(Top 5 responses requested for this question.)	complexity / too hard	49%	104	14%	
	current IT system restrictions	43%	91	14%	
No. of responses with rankings for Qn. 28 = 177	Other	25%	52	19%	
<b>SECTION 8</b>					
Q29: What areas do staff in your organisation need training in?	product identification	23%	48		
	bar coding	23%	48		
	EDI	24%	51		
	general B2B e-commerce (the basics)	53%	112		
	scan packing	18%	39		
	Other	12%	25		
Q30: Given that training is required, what mode of delivery would you prefer?	web based (self-help)	20%	43	13%	
	half day training workshop (in what capital city)	45%	96	42%	
(Top 2 responses requested for this question.)	CD	22%	47	14%	
	booklet	18%	38	12%	
Top responses with rankings for Qn. 30 = 180	one on one	37%	78	37%	
	Other	4%	8	4%	
	Melbourne	14%			
	Sydney	3%			
	Perth	3%			
	Brisbane	2%			
	Adelaide	2%			
Q31: How long did it take you to complete in this survey?	10 minutes or less	51%	108		
	11-20 minutes	42%	88		
	21-30 minutes	5%	10		
	31-60 minutes	1%	3		
	Over one hour	0%	0		