

THE RESEARCH

FORUM

A document prepared for the
Australian Quarantine and Inspection Service

**Grain Clients
2005 Satisfaction Survey
Research Report**

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GRAIN CLIENTS - 2005 SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 116 clients of AQIS Grain Client Services were contacted by telephone to participate in the Customer Satisfaction Survey in 2005. Of these, 102 clients actually participated in the survey, giving an **overall response rate of 88%** - showing that there was an excellent response to the survey among Grain clients.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

Most respondents who participated in the 2005 survey were long-time clients of AQIS. Almost 3 in 4 (72%) had dealt with AQIS for 5 years or more. The distribution of the 2005 survey sample with regards to the length of time dealing with AQIS is comparable to the 2004 survey sample when 71% had dealt with AQIS for 5 years or more.

Length of time	% (n = 102)
Less than 12 months	4
1-3 years	10
3-5 years	14
5-9 years	27
10 years or more	45
TOTAL	100

Frequency of contact with AQIS

Most Grain clients have frequent contact with AQIS. More than two thirds of clients (69%) had contact with AQIS on a weekly basis or more often. Frequency of contact with AQIS in 2005 is similar to that reported in 2004 when 61% of clients reported contacting AQIS on a weekly basis or more often.

Contact with AQIS	% (n = 102)
Daily	27
Weekly	42
Fortnightly	13
Monthly	11
Every couple of months	3
Less often	3
TOTAL	100 ¹

Regular AQIS contact office

Regular contact office	% (n = 102)
NSW - not Sydney	32
Sydney	25
Victoria - not Melbourne	19
Melbourne	15
Perth	14
Brisbane	11
Adelaide	7
Queensland – South Qld	6
Canberra	5
QLD far North/Cairns/Townsville	4
WA – not Perth	4
SA – not Adelaide	3

Note: Table adds to more than 100% as clients could specify more than one office.

The table above shows the main AQIS office with which Grain clients liaise. The main two contact offices for Grain clients in 2005 are regional NSW and Sydney. Regional Victoria, Melbourne, Perth and Brisbane offices are also utilised by a fair proportion of clients. Since the 2004 survey, there has been a significant increase in the proportion of respondents contacting Victorian offices.

¹ Figures in the text and in tables are generally rounded. 'Totals' are generally the rounded sum of unrounded figures and so may not be the strict sum of the figures presented.

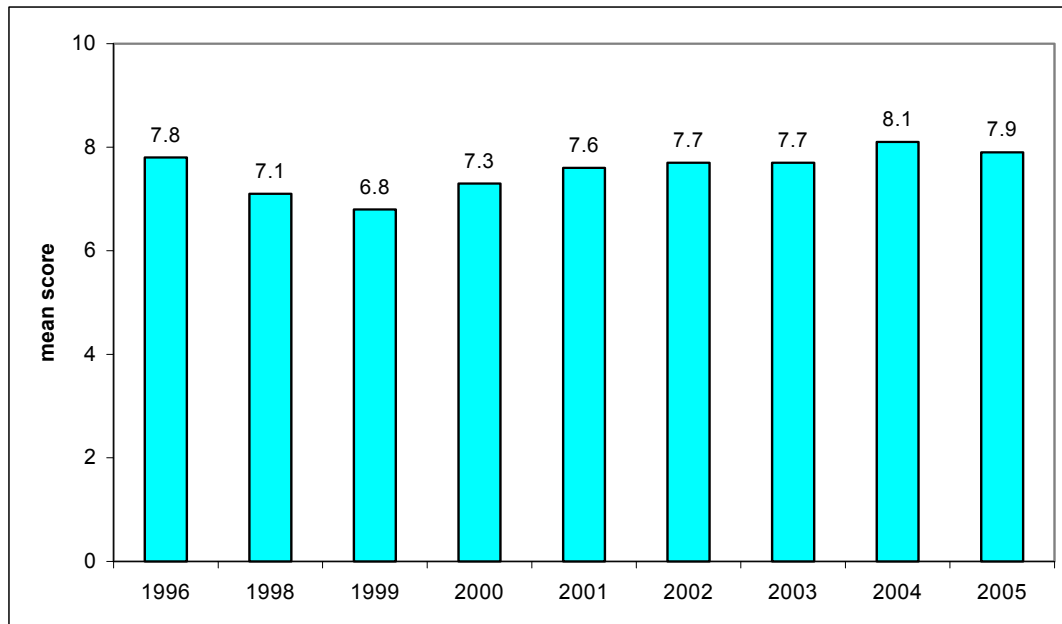
OVERALL SATISFACTION

Respondents were asked to rate their overall satisfaction with the service provided by AQIS on a scale of 1 to 10 (1 being 'extremely dissatisfied' and 10 being 'extremely satisfied'). **The table below shows that the vast majority of Grain clients were satisfied with the service provided to them by AQIS, with 94% giving it a rating of 6 or more out of 10.** In fact, 1 in 8 said they were 'extremely satisfied' with AQIS service.

Level of overall satisfaction with AQIS service (on a scale of 1-10)	% (n= 102)
1 (Extremely Dissatisfied)	1
2-5	5
6-9	79
10 (Extremely Satisfied)	15
TOTAL	100

Clients' overall satisfaction with AQIS service was therefore very high in 2005, with an average satisfaction rating of 7.9 (out of 10). This represents a very slight and non-significant decrease in average satisfaction compared to the level reported in 2004 (8.1 out of ten). The figure below shows that Grain clients' overall satisfaction has been generally increasing since 1999.

Grain clients – Overall Satisfaction with AQIS service, 1996-2005



The 2005 satisfaction rating and largely positive trend among Grain clients since 1999 is very commendable and represents a highly satisfied client group. AQIS's Grain Clients Services Division continues to perform well.

Satisfaction across AQIS offices

Most Grain clients (72%) said that they usually deal with only one AQIS office. Just 28 Grain clients said that they deal with more than one office regularly. Among these, opinion was split with regards to whether their level of satisfaction was *consistent* across all the offices they deal with. However, considering the very small sample size this is not a matter for concern. Among the 12 clients who thought satisfaction differed across offices, 3 people mentioned the Sydney office and 3 the Melbourne office as the one with which they were least satisfied. Reasons for dissatisfaction largely centred on inconsistent rule interpretation within those offices.

Changes in overall satisfaction over the last two years

Two in five (41%) Grain clients said their overall satisfaction had improved over the last two years. A similar proportion (47%) said that they were as satisfied now, as they were two years ago. Only 10% reported that they were less satisfied. These results have not changed significantly since the previous survey period (when the respective figures were 41%, 43% and 13%).

Change in overall satisfaction over last 2 years	% (n = 102)
Improved	41
Stayed the same	47
Deteriorated	10
Don't know	2
TOTAL	100

Main factors contributing to *improvement* in satisfaction

A range of factors were mentioned by clients whose overall satisfaction had improved (42 respondents) as the contributing force to their improved satisfaction. The main factors mentioned by 5 or more clients were all about AQIS staff:

- Being better trained;
- Taking more of a team approach and being more flexible;
- Being more helpful; and
- Being more approachable and communicating better.

The table below shows all the responses provided.

Main factors contributing to <i>improvement</i>	% (n = 42)
Staff are better trained	19
Team approach/more flexible	14
More approachable/better communication	12
More helpful	12
More contact/personal service	9
More professional	7
Understand business/business needs	5
Improved efficiency	2
More responsive	2
Other	17
TOTAL	100

Main factors contributing to *deterioration* in satisfaction

Only 10% of respondents (or 10 people) reported that their overall satisfaction had deteriorated over the last two years. Reasons cited by respondents for deterioration were over a number of factors including lack of staff availability, lack of staff continuity, inconsistent rule interpretation and bureaucracy/inflexibility (exact percentages are not provided considering the small sample size).

Changes that AQIS could make to improve levels of service

Respondents were asked (an open-ended question) about improvements that could be made to AQIS services. Suggestions for improvement were widely spread across a number of domains in 2005.

Overall, **no single area was suggested by a significant proportion of respondents as requiring improvement.**

This was a very positive result indicating AQIS is performing well across all areas of service delivery and is not performing below the expectations of Grain clients. This view is supported by the 33% of respondents who said that no improvements were necessary.

Suggested changes to improve service	% (n = 102)
None/no improvements/no changes necessary	33
Better trained/more knowledgeable staff/specialist knowledge	12
More staff	8
Closer consultation with industry	8
More accessible/contactable	7
More flexible/understanding	6
Reduce fees/improve value for money	5
Consistent rule interpretation	5
More information/updates	5
Better access to information/updates	4
Adopt a team approach/work with us	3
More efficient/faster processing	2
More automated quarantine entry processing	2
Improve understanding of business	1
Other	7
Don't know	5
Total	121

Note: The percentages in the above table add to more than 100% as respondents were able to suggest more than one improvement.

SATISFACTION WITH AND IMPORTANCE OF SPECIFIC AQIS SERVICE ATTRIBUTES

Respondents were asked to rate (i) the importance of, and (ii) their satisfaction with nine attributes of AQIS service on a 1-10 scale (1 being 'not at all important/extremely dissatisfied', and 10 being 'extremely important/extremely satisfied').

Asking clients to rate how important they perceive particular attributes of AQIS service to be enables AQIS to identify the needs of each client group, and to improve services to these groups. It is, in effect, developing a *client values framework* for each client group. By measuring client satisfaction against these values, AQIS can identify areas of service that are fulfilling clients' needs, or service areas that need to be improved.

According to clients, the **four most important attributes of AQIS service are: clear expectations, staff technical competence, staff professionalism, and being responsive to needs**. Respondents not only thought that these attributes were important, but were also *very satisfied* with these aspects of service. **Average satisfaction ratings for these four factors ranged from 7.8 to 8.1.**

The other five service attributes were also seen as important (i.e., rated 8 or more out of 10). **AQIS performed very well on these attributes, with average satisfaction ratings of 7.1 or higher. This shows that AQIS is meeting the needs of this client group.**

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Average rating - Satisfaction x Importance
Expectations are clear	7.9	8.9	70
Staff professionalism	8.1	8.8	70
Responsive to needs	7.9	8.8	70
Staff technical competence	7.8	8.8	69
Understand needs of business	7.8	8.6	67
Flexible	7.4	8.2	61
Adopting team approach	7.6	8.2	62
Value for money	7.1	8.2	58
Timely & accurate invoices	7.7	8.0	62

The last column in the table above provides a 'product' of columns 2 and 3 – that is, average satisfaction multiplied by average importance. Scores in this last column can potentially range from:

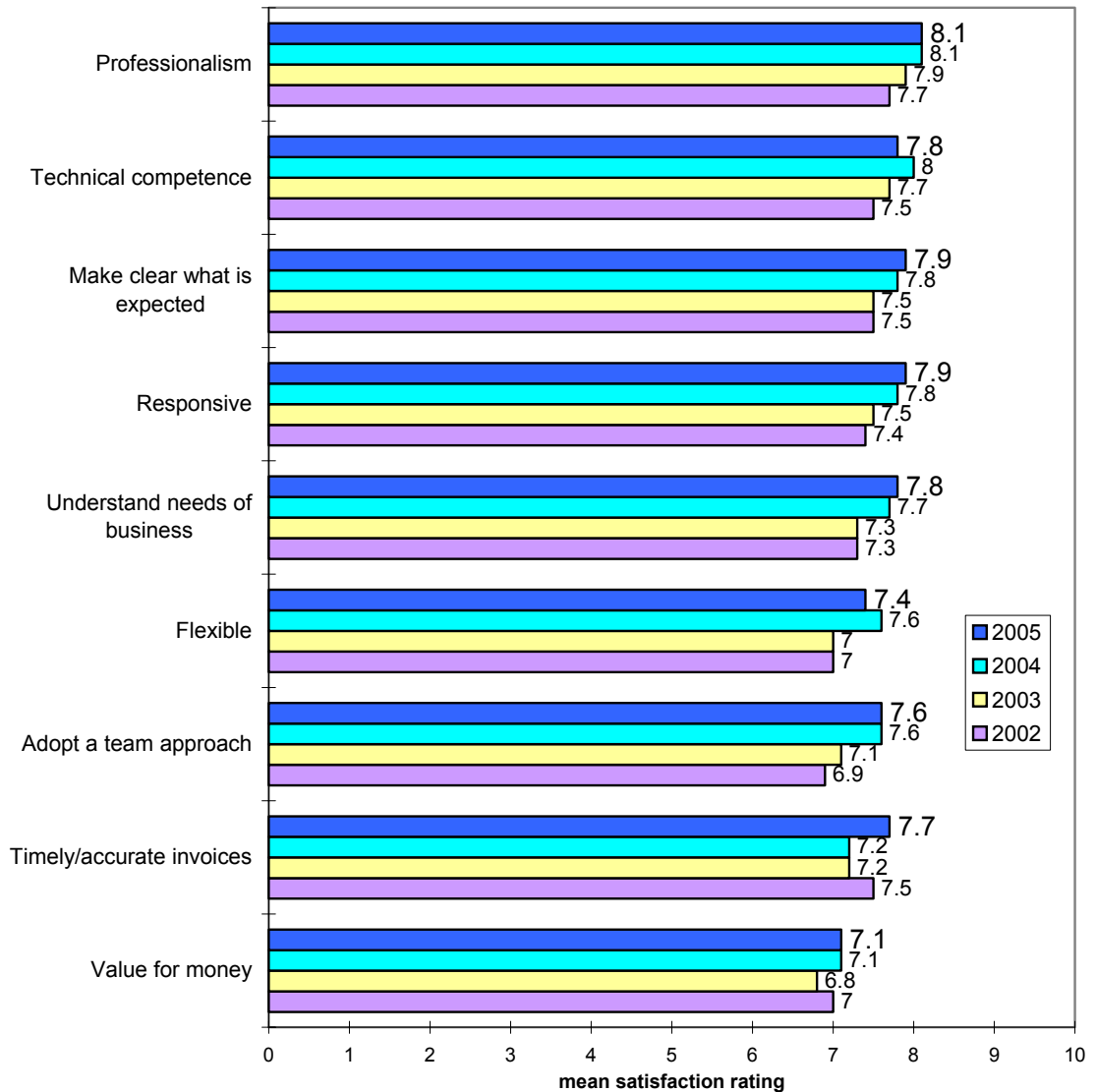
- ◇ **1** (extremely dissatisfied with an attribute that is not at all important) to
- ◇ **100** (extremely satisfied with an attribute that is extremely important).

For Grain clients, these final ‘satisfaction x importance’ scores range from 58 for ‘Value for money’, to 70 for staff professionalism, clarity of expectations and being responsive to client needs. Therefore, **Grain clients’ satisfaction with AQIS service is generally high**, with all ‘product scores’ being above 50.

Comparisons with historical data can be made for these service attributes. Looking at the average satisfaction ratings, the figure below shows that **client ratings of AQIS service have increased slightly for most service attributes or were maintained since 2004**. The only large change was a positive one – greater satisfaction with timeliness and accuracy of AQIS invoices.

Current satisfaction ratings and the continued positive trend across the array of AQIS service attributes is a very positive result. AQIS’s Grain Client Services Division is performing at a high standard.

Grain clients – Average satisfaction with service attributes – 2002 – 2005



ASSESSMENT OF SERVICE AGAINST AQIS VALUES

Respondents were asked to rate 25 attributes of AQIS service provision, which represent five key values that underlie AQIS service standards. These values are as follows:

Value	Description
1. Professionalism of staff (6 attributes)	Doing the best job we can, serving out clients in a practical, diligent, rigorous and outcomes-focussed way;
2. Integrity of staff (3 attributes)	Behaving ethically, acting with honesty, loyalty and courage;
3. Openness of staff & the organisation (7 attributes)	Building trust, being frank, open to ideas, and accessible to staff and clients
4. Fairness of staff (7 attributes)	Ensuring that people get a fair go, that all are treated equitably and justly;
5. Respect of staff (2 attributes)	Respecting each other, our families, our clients, those with different ideas and those from diverse backgrounds and cultures.

Respondents were presented with 25 statements about the attributes, and were asked to rate their level of agreement with each statement on a five-point agreement scale (with an additional 'don't know' option) as follows:

1 = Strongly agree, 2 = Agree, 3 = Neither agree nor disagree, 4 = Disagree, and 5 = Strongly disagree.

Professionalism of staff

Once again, Grain clients rated the professionalism of AQIS staff very highly. Two aspects of staff professionalism were rated extremely highly, with approximately 9 in 10 clients agreeing (and less than 10% disagreeing) that:

- ❖ **Staff are professional; and**
- ❖ **Staff are well trained.**

Further, approximately seven in ten also agreed that:

- ❖ AQIS staff helps them find solutions;
- ❖ AQIS staff adequately explained QA/CA/Co-regulation options to them; and
- ❖ Tasks AQIS performs are value for money.

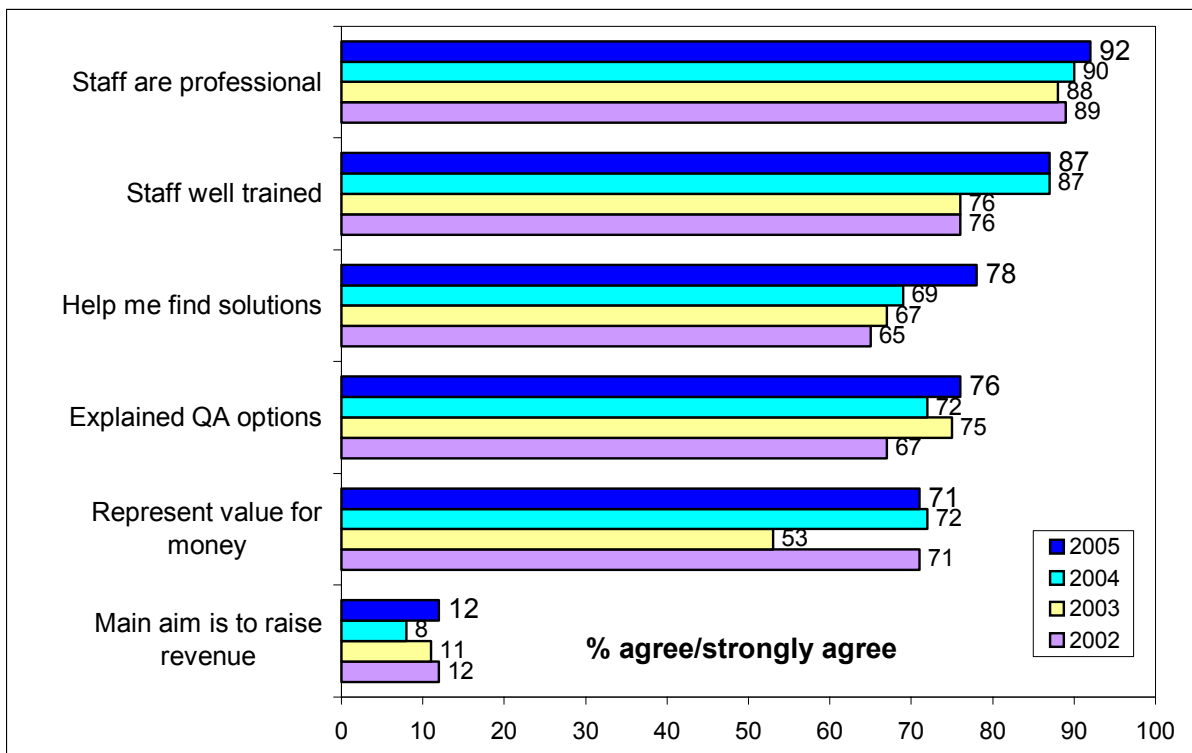
In addition, slightly over 3 in 4 clients (77%) *disagreed* that AQIS's aim was to raise revenue (only 12% of Grain clients agreed with this negative view).

Professionalism statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff are very professional	92	4	4
Staff well trained	87	6	7
Helps me find solutions	78	10	11
Adequately explained QA/CA/Co-reg optns	76	10	13
Tasks AQIS performs are value for money	71	14	15
Principal aim of AQIS is to raise revenue	12	11	77

As shown in the figure below, two positive changes have taken place between 2004 and 2005:

- AQIS helps them find solutions (9% increase in agreement); and
- More clients agree that AQIS has adequately explained the QA options to them.

Grain clients – Ratings of Staff Professionalism -- 2002-2005



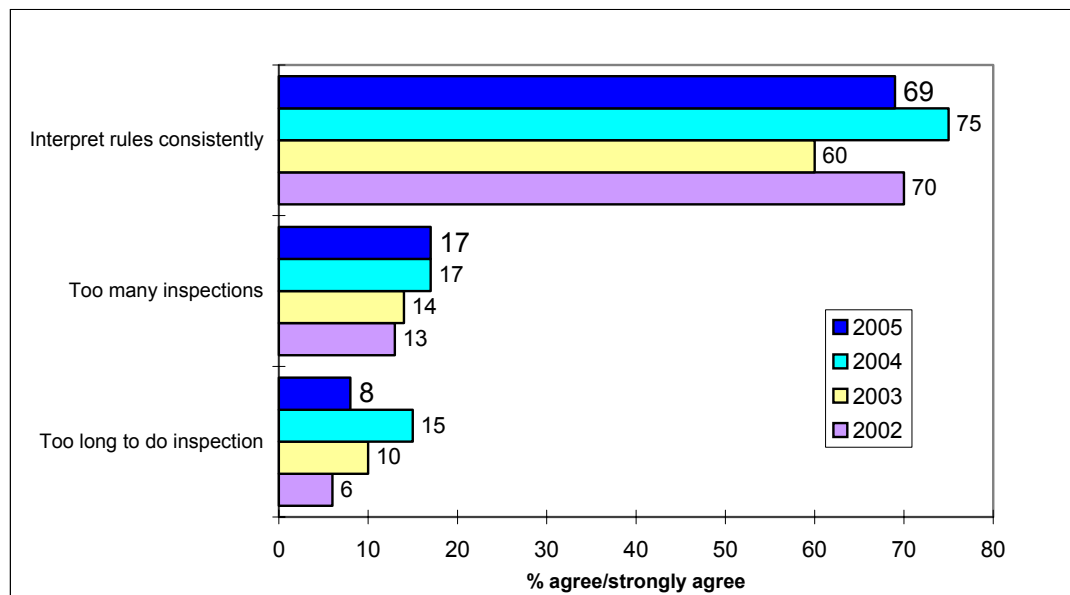
Integrity of staff

Integrity of AQIS staff was also rated highly in 2005. On the whole, the figures have stayed fairly stable since 2004.

There was a *decrease* of 5% in the proportion of clients agreeing that 'staff interpret rules and regulations consistently', indicating more inconsistency. However, there was also a positive move, with 7% fewer clients now agreeing that AQIS staff take too long to do inspections and audits (down from 15% to 8%). In fact, the majority of clients (70%) disagree that AQIS conducts too many inspections and also disagree (82%) that AQIS takes too long to do inspections. In other words, **the majority of AQIS clients are satisfied with the inspections being conducted by AQIS** in terms of number and duration.

Integrity statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff interpret rules & regulations consistently	69	7	24
Too many inspections	17	13	70
Staff take too long to do inspections	8	9	82

Grain clients – Ratings of *Staff Integrity* in 2002-2005



Openness of staff and of the organisation

Satisfaction with the openness of AQIS staff, and with the openness of the organisation as a whole, was generally high in 2005 as has been the case in the past. Over eight from ten Grain clients felt that:

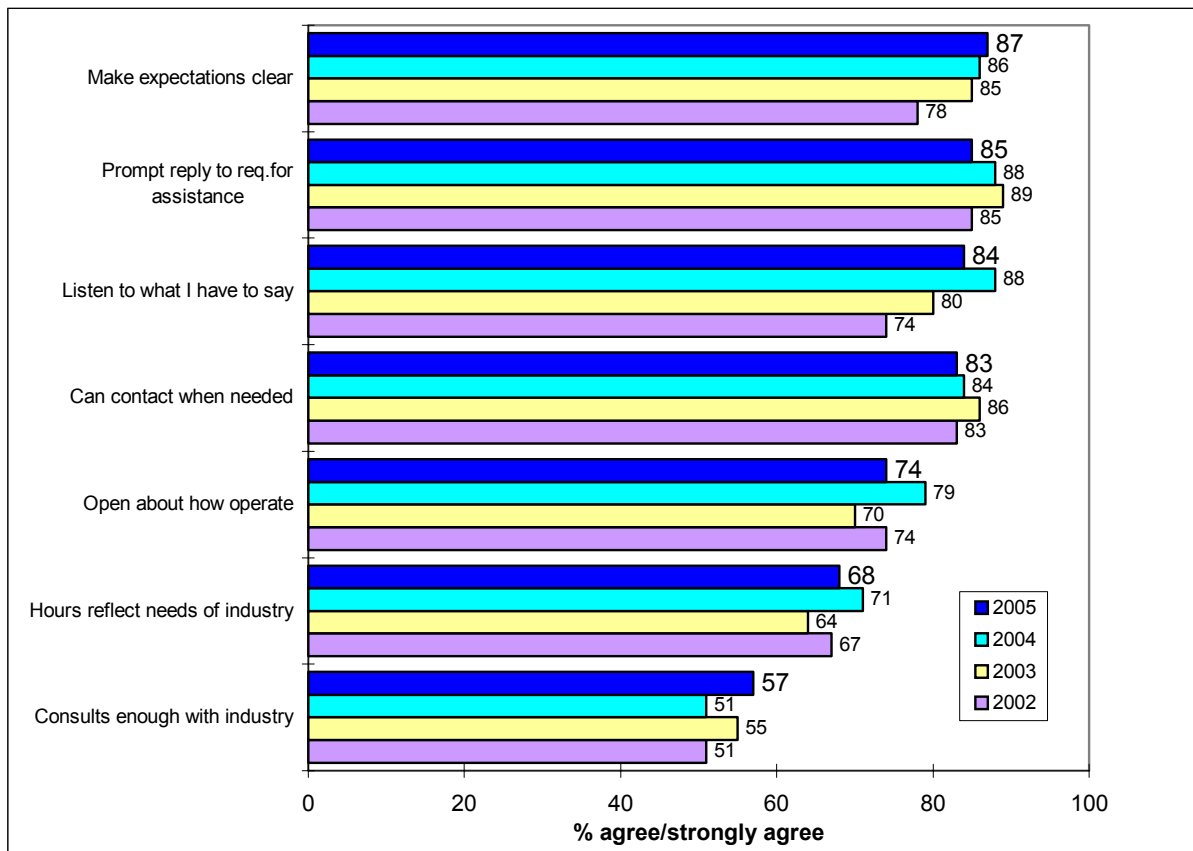
- ❖ AQIS's expectations are clear;
- ❖ Their requests for assistance are promptly dealt with;
- ❖ AQIS staff listen to them; and
- ❖ They can contact AQIS when they need to.

Furthermore, three quarters of Grain clients felt AQIS is open about how it operates and two thirds of clients felt that AQIS's hours of operation reflect business needs.

The weakest performing attribute within the 'Openness' factor in 2005 (as in past years) was response to the statement the AQIS 'consults enough with industry'. Just over half the Grain clients agreed with this. However, agreement with this view *increased* by 6% in 2005. Conversely, agreement with the view that AQIS is open has *decreased* by 5% since 2004. These changes are shown on the chart overleaf.

Openness statements	%	%	%
	Agree/ Strongly Agree	Neither/ Don't know	Disagree/ Strongly Disagree
Expectations are clear	87	4	9
Respond promptly to requests for assistance	85	7	8
Listens	84	6	10
Can contact AQIS when needed	83	8	9
Open about how they operate	74	15	11
Hours of operation reflect needs	68	12	20
Consults enough with industry	57	21	23

Grain clients – Ratings of Staff Openness 2002-2005



Fairness of staff

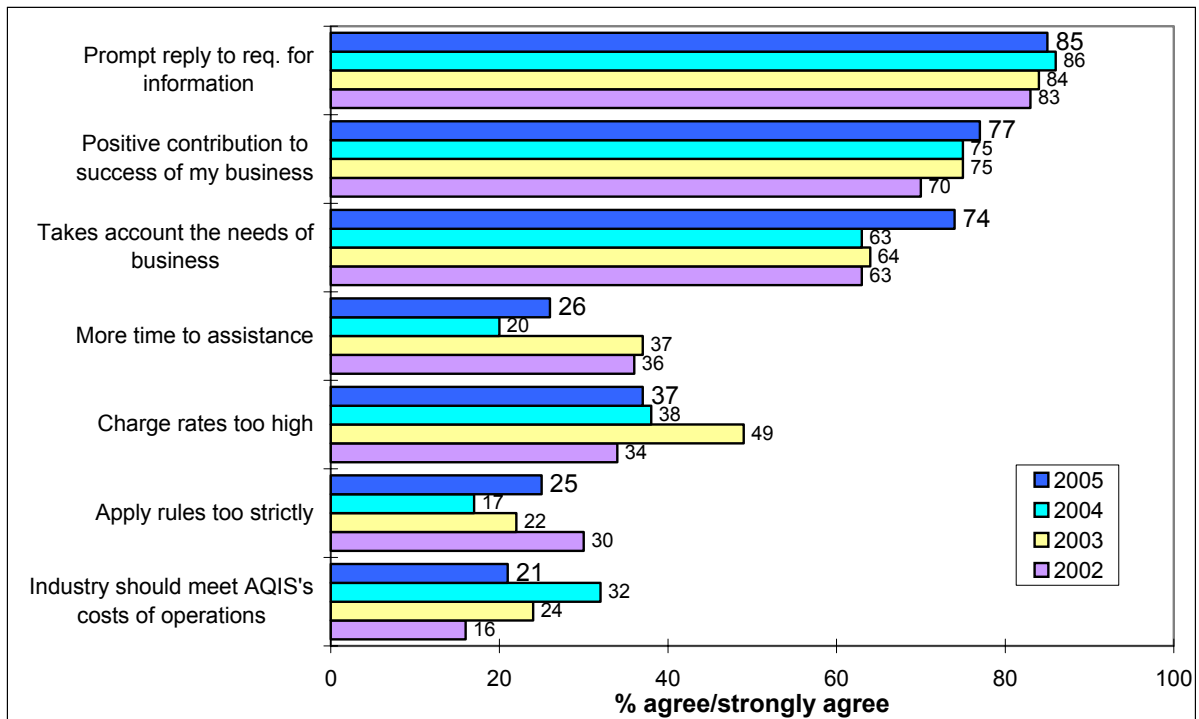
Staff fairness was generally rated highly by Grain clients in 2005. The majority (three quarters or more) of Grain clients agreed that:

- Staff respond promptly to requests for information (85% agreed);
- AQIS contributes positively to clients' business success (77% agreed); and
- AQIS takes the needs of clients' business into account (74% agreed).

Also, the majority *disagreed* that staff apply rules and regulations too strictly (62% disagreed) and almost half (47%) *disagreed* that AQIS should devote more time to assistance (and conversely less to policing). Furthermore, only just over a third (37%) felt that AQIS charge rates are too high. As expected, only one in five feels that industry should meet all of AQIS's costs.

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	85	8	7
Makes positive contribution to business success	77	12	11
Take needs of business into account	74	9	18
Charge rates too high	37	17	46
Should devote more time to assistance/less to policing/regulating	26	26	47
Staff apply rules & regulations too strictly	25	13	62
Industry should meet all of AQIS's costs	21	16	64

Grain clients – Ratings of Staff Fairness – 2002-2005



The figure above shows that there were **three notable changes since 2004:**

- Fewer clients say industry should meet all of AQIS's costs of operation;
- More clients are saying rules are being applied too strictly; and
- Importantly, more clients say that staff *do* take their business needs into account (11% increase).

Respect

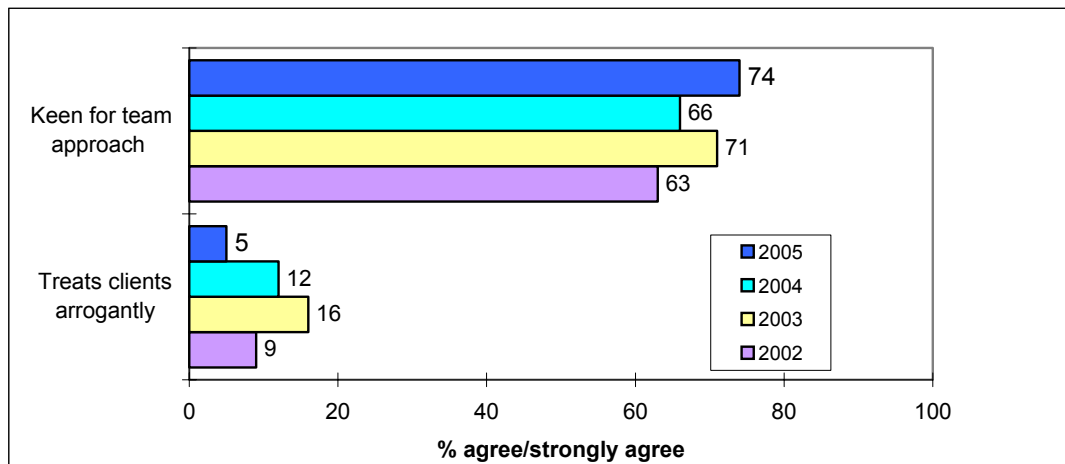
Grain clients rated AQIS staff respect very highly and this has improved further in 2005.

More than 4 in 5 clients (83%) *disagreed* that AQIS staff treat their clients arrogantly. Only 1 in 20 felt that AQIS staff were arrogant in dealings with them and this feeling has *decreased* by 7% since 2004.

The majority of clients (74%) also agreed that AQIS is keen to develop a team approach with the Grain industry, an 8% increase in agreement since 2004. Only 8% of clients disagreed with this statement.

Respect statements	% Agree/Strongly Agree		% Disagree/Strongly Disagree	
			Neither/Don't know	
Keen to develop team approach with industry	74		17	8
Treats its clients arrogantly	5		12	83

Grain clients – Ratings of Staff Respect - 2002-2005



BROAD AQIS ISSUES

Primary role and function of AQIS

Respondents were asked what they perceived the primary role and function of AQIS to be.

Primary role & function of AQIS	% (n = 102)
Protect Australia from incoming pests/diseases	40
Monitor quality of exports	30
Monitor quality of imports	10
Facilitate/administer exports	9
Ensure compliance	5
Responsible for regulations	2
Facilitate/administer imports	1
Represent Australia's interests overseas	1
Don't know	1
Other	1
TOTAL	100

Most clients felt AQIS's role is to protect Australia from incoming pests and diseases (40%). A further 40% felt that AQIS's main role is to monitor the quality of exports or imports. These views have not changed significantly since the previous survey period.

Value of AQIS Label

Value of AQIS label	% (n = 102)
High value	65
Some value only	19
Low value	2
No value at all	8
Don't know/Depends	4
Not involved in exports	3
TOTAL	100

Respondents were asked, "If you are involved in export in any way, how much value if any do you see in having an AQIS label on or AQIS clearance of your products when it comes to accessing overseas markets?".

Almost all respondents (97%) were involved in exports, and of these **87% felt that the AQIS label *does* add 'high' or 'some' value when it comes to accessing overseas markets.** In fact, the large majority of all Grain clients (65%) believe that the AQIS label adds 'high' value – a very positive result.

These results have not changed significantly since the previous survey period.

FEES/CHARGES AND VALUE FOR MONEY

Rating value for money of AQIS services

Rating of value for money (on a scale of 1 – 10)	% (n = 102)
1 (Very poor value for money)	0
2-5	28
6-9	60
10 (Very good value for money)	12
TOTAL	100

Respondents were asked to rate the value for money of AQIS services on a scale of 1 to 10 (where 1 = *very poor value for money*, and 10 = *very good value for money*).

Just over 7 in 10 Grain clients (72%) gave AQIS service value for money a rating of 6 or more out of 10 (this has increased by 7% since last year).

The average rating of value for money among Grain clients in 2005 was 7.0 out of 10. This is a good result, in the region of "good value for money", and has also increased since 2004 (when the mean was 6.7).

Changes to AQIS charges over the last 12 months

Changes to AQIS charges over the last 12 months	% (n = 102)
Decreased	8
Stayed the same	35
Increased	27
Both increased and decreased	1
Don't know	29
TOTAL	100

When asked if AQIS charges had changed over the last 12 months, most (35%) reported that charges had not changed. More than a quarter, however, reported increased charges and only 8% reported lower charges. **Clearly, charge rates have increased for a large segment of Grain clients and they are aware of the increases.**

These results contrast with the 2004 findings when 30% more clients reported decreased charges and 5% fewer reported increased charges.

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Aware of AQIS Service Charter	% (n = 102)
No	89
Yes	9
Don't know	2
TOTAL	100

Respondents were asked whether or not they were aware that AQIS has a Service Charter. **Most Grain clients were unaware of the AQIS service charter.** Less than 1 in 10 (9%) said that they were aware of the Charter. This is much lower than the 2004 figure when 25% awareness was recorded.

The Grain Client Service Area needs to more consistently communicate with clients about the existence of the AQIS Service Charter.

Awareness of Service Standards in the Charter

Of those (9 Grain clients) who were aware of the Charter, most were aware of the actual Standards therein (however the exact percentage is not reported here due to the small sample size).

How often Service Standards are met

All clients were read out three of the service standards contained within the Service Charter and asked to state to what extent AQIS had met each standard over the last 12 months.

How often Service Standard met	"Replies to your correspondence within 20 working days of receipt with an answer to your query or at least letting you know when you can expect an answer" (N = 102) %	"Answers your telephone calls or messages promptly during normal office hours" (N = 102) %	"Responds to your requests for printed information within 5 working days of receipt" (N = 102) %
Always	83	65	65
Often	11	20	22
Sometimes	3	11	9
Rarely	2	3	4
Never	0	0	0
Don't know	0	0	0
TOTAL	100	100	100
Always + Often			
2002	81	91	74
2003	90	90	83
2004	86	93	85
2005	94	85	87

Overall, performance levels have remained consistently high in 2005 with 85% or more Grain clients reporting AQIS had 'always' or 'often' met each of the three service standards over the past 12 months (shown in the last row of the table above). This represents very high levels of service provision. Also commendable is the fact that for all three standards no clients reported a standard 'never' or 'rarely' being met over the last 12. **These are very positive findings indicative of high attention to the standards among AQIS staff in the Grain Client services area.** The one exception we note is that the likelihood of meeting the standard regarding answering of telephone calls or messages during normal office hours has declined by 8% since 2004.

AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin	% (n = 102)
Yes	27
No	70
Don't know	3
TOTAL	100

Almost three in ten of Grain clients (27%) reported that they receive the AQIS bulletin. This level has decreased slightly since the previous survey in 2004, when one third (33%) reported receiving the Bulletin.

Amongst those who do receive it, readership of the Bulletin is high: **59%** of those who do receive it **read every edition** and a further 18% read it every few months. Furthermore, most of those who receive it also read most of it: **64% read half or more of the Bulletin** (only 4% read a quarter or less of it).

Finally, **most of those who receive it (68%) judge it to be useful:**

- ❖ 25% say it is very useful; and
- ❖ 43% say somewhat useful.

About 1 in 5 (21%) feel it is of little use while no one judged it as 'not at all useful'.

AQIS Website

The table below shows that, in 2005, two thirds of Grain clients (66%) said they had visited the AQIS website. Surprisingly, this has decreased by 5% since 2004. Nevertheless, the majority of Grain clients visited the AQIS website in both 2004 and 2005. The AQIS website is therefore a significant communication route for most Grain clients.

Visited the AQIS Web site	% (n = 102)
Yes	66
No	34
TOTAL	100

Most of those who have visited the website (51%) do so at least monthly:

- ❖ 3% visit daily;
- ❖ 13% visit weekly;
- ❖ 35% visit monthly;
- ❖ 43% visit only once or twice a year; and
- ❖ 6% visit once every few years.

Furthermore, **most of those who visit the website (81%) judge it to be useful:**

- ❖ 45% say it is very useful; and
- ❖ 36% say somewhat useful.

Only 18% feel the website is of little use while only 2% judge it as 'not at all useful'.

Finally, those who visited the AQIS website were asked which areas they regularly visit. The answers are outlined below and show the wide range of interests of Grain clients on the AQIS website.

- ❖ **Export facilitation** 15%
- ❖ **Import requirements**..... 15%
- ❖ **Phyto** 13%
- ❖ **Exporting plants/grains and horticulture**..... 10%
- ❖ Icon..... 9%
- ❖ Exporting organic and bio-dynamic products ... 6%
- ❖ Farms for Quarantine - export..... 3%
- ❖ EXDOC 3%
- ❖ Fees and charges - Export 2%
- ❖ Useful links - Export 2%
- ❖ Other 24%
- ❖ Don't know 9%

Clearly, export facilitation, import requirements, Phyto (database), exporting plants/grains and horticulture and Icon are popular areas for this client group.

INDUSTRY CONSULTATION

Awareness of Peak Organisations that consult with AQIS

Slightly over 1 in 3 (36%) Grain clients are aware of Peak Industry Organisations that consult with AQIS to represent their interests. This has decreased slightly (by 3%) compared to 2004 survey results.

Awareness of Peak Industry Organisations	% (n = 102)
Yes	36
No	62
Can't say	2
TOTAL	100

Membership of Peak Industry Organisations

Of those 37 Grain clients who were aware of these Peak Industry Organisations, most (70%) are currently members of these peak bodies.

Membership levels amongst those clients 'aware' of peak industry organisations have declined since 2004 (when the membership figure was 83%).

Member of Peak Industry Organisations	% (n = 37)
Yes	70
No	30
TOTAL	100

AQIS PERMIT APPLICATION PROCESS

AQIS Permits

Grain clients were asked whether they were required to apply for an AQIS permit. Just over half (52%) did need to apply for an AQIS permit.

Required to apply for AQIS permit?	% (n = 102)
Yes	52
No	48
TOTAL	100

Most Grain clients (77%) felt that the permit application process was completed within an acceptable or faster than expected time-frame and only 1 in 17 felt it took too long. These figures are similar to those reported in 2004 when 78% rated the permit application process as acceptable or better.

Rate the permit application process	% (n = 53)
Faster than expected	9
Acceptable time-frame	68
Took too long	6
Don't Know/Can't say	17
TOTAL	100

As the table below shows, the vast majority of Grain clients (77%) felt the permit conditions were clear and easy to understand (only 8% felt this was not the case).

Were the permit conditions clear and easy to understand?	% (n = 53)
Yes	77
No	8
Don't know/Can't say	15
TOTAL	100

SPECIAL INTEREST ISSUES

AQIS Approved Co-regulation/QA/Compliance Agreement systems

Grain clients were asked if they have an AQIS approved Co-regulation (Co-reg), Quality Assurance (QA), or Compliance Agreement (CA) system in place. The majority (68%) reported that they did. This proportion is notably higher than that reported in 2004 when 55% reported having such a system in place.

AQIS Approved Co-regulation/Quality Assurance/ Compliance Agreement system	% (n = 102)
Yes	68
No	32
TOTAL	100

The 68% (or 69 clients) with AQIS approved QA/CA/Co-reg systems were asked:

- i) Whether AQIS was very helpful in the development of their QA/CA/Co-reg system; and
- ii) Whether AQIS was very knowledgeable about QA/CA/Co-reg systems.

The large majority of responses to both of these items were positive, as can be viewed in the table below.

Co-regulation/Quality Assurance/ Compliance Agreement systems	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
AQIS was very helpful in the development of the QA/CA or co-regulation system	76	15	9
AQIS is very knowledgeable about QA/CA or Co-regulation systems	78	13	9

The 'knowledgeable' figure is identical to that found in 2004 **while the 'helpfulness' score has increased by 5% since 2004.**

Furthermore, the table below shows that the vast majority of Grain clients (91%) with AQIS approved QA/CA/Co-reg systems believe the system is working well. This indicates a **high level of client satisfaction** with this process.

Is the Co-regulation/Quality Assurance/ Compliance Agreement system working well?	% (n = 69)
Yes	91
No	9
TOTAL	100

Improvements to QA/CA/Co-reg systems

Grain clients were asked what improvements they could suggest to the system. **Most Grain clients (41%) reported that they could think of no improvements to the QA/CA/Co-reg system.**

Of the suggestions made there was a spread across a number of issues. No single area was nominated for improvement by a significant proportion of clients. The main suggestions (made by just 3%-6% of clients) were around simplifying the system, working more closely with industry and placing more trust in industry.

Overall, this was a **very positive result indicating that the QA/CA/Co-reg systems are performing well.**

The suggestions provided by clients are shown in the table below.

Improvements to QA/CA/Co-reg systems	% (n = 69)
None	41
System needs to be simplified	6
AQIS needs to work more closely with industry and understand industry	4
AQIS needs to place more trust in industry	3
System should cost less	3
AQIS needs to increase its presence	1
Training process needs review	1
Don't know/Can't say	22
Other (idiosyncratic/individual/unclassifiable comments)	22

CLIENT COMMENTS

Finally, Grain clients were given the opportunity to supply any additional comments at the end of the survey. Only 26% (27 clients) took up this opportunity to comment. In total 59 comments were made and are shown in the table below.

Of the comments, 19 were positive, mentioning good customer service provided by AQIS, and helpfulness and responsiveness of staff.

Other comments	Frequency of mention (n = 27)
Not enough flexibility/negative attitude/over-regulated	4
Poor training of staff/need improvement of training	4
Room to improve/still need to improve in some areas	4
Fees too high/need flexible fee structure	3
More accessible staff when needed	3
Work with industry/closer consultation with industry	3
Faster turn around time/Delays/Takes to long to get items through	3
Need more staff/ more regional staff	2
Don't understand business/my business	2
More flexible hours/contactable outside business hours	2
Need more awareness of market place	2
Need to work in partnership/Act more like police	2
Unprofessional/bad customer service	1
Improve electronic information/computer systems	1
More/better/less confusing guidelines	1
Too political/Government revenue raiser/Doesn't perform real function	1
Happy/doing a good job	9
Helpful/responsive/easy to deal with	5
Improved services/Getting better	2
Performs a necessary function/valuable service	1
Good service/Excellent customer service	1
Professional	1
Total	59

Note: The total sum in the above table adds to more than 27 as respondents were able to suggest more than one improvement.