

THE RESEARCH

FORUM

A document prepared for
Australian Quarantine and Inspection Service

**Horticulture Clients
2005 Satisfaction Survey
Research Report**

Prepared by:
Dr Fadil Pedic
Jerry Goldfried

September 2005

The Research Forum
96 Phillip Street
(PO Box 3262)
PARRAMATTA NSW 2124
T 02 9687 4744
F 02 9633 4494

CONTENTS

SURVEY SAMPLE.....	1
SAMPLE CHARACTERISTICS.....	1
OVERALL SATISFACTION	3
SATISFACTION WITH/IMPORTANCE OF SERVICE ATTRIBUTES	6
ASSESSMENT OF SERVICE AGAINST AQIS VALUES	9
BROAD AQIS ISSUES	15
FEEES/CHARGES AND VALUE FOR MONEY.....	17
AQIS SERVICE CHARTER.....	18
AQIS INFORMATION PRODUCTS.....	20
SPECIAL INTEREST ISSUES.....	22
CLIENT COMMENTS	25

HORTICULTURE CLIENTS - SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 127 clients of AQIS Horticulture Client Services were contacted by telephone to participate in the Customer Satisfaction Survey in 2005. Of these, **103 clients** actually participated in the survey, giving an overall **response rate of 81%** - showing that there was a very good response to the survey among Horticulture clients.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

As in past years, most respondents who participated in the survey were long-time clients of AQIS. More than half (53%) had dealt with AQIS for 10 years or more. A significant proportion, 20%, had dealt with AQIS for 5-9 years.

As shown in the table below, the 2005 sample of clients was largely comparable with that interviewed in 2004 when it came to number of years of contact with AQIS.

Length of time	% (n = 103) 2004	% (n = 103) 2005
Less than 12 months	5	5
1-3 years	13	11
3-5 years	7	11
5-9 years	25	20
10 years or more	49	53
Don't know/not stated	2	0
TOTAL	100 ¹	100

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.

Frequency of contact with AQIS

As in 2004, most Horticulture clients have frequent contact with AQIS. Over half (55%) contact AQIS on a weekly or more frequent basis. In this sense, the findings have not changed since 2003.

Contact with AQIS	% (n = 103)
Daily	26
Weekly	29
Fortnightly	6
Monthly	13
Every couple of months	9
Less often	1
Varies/depends on work flow	17
TOTAL	100

Regular AQIS contact office

Regular contact office	% (n = 103)
Victoria - Melbourne	31
QLD - Brisbane	15
WA - Perth	13
Canberra	12
TAS - Hobart	9
NSW Sydney	8
Victoria - not Melbourne	8
SA - Adelaide	7
NSW - Not Sydney	6
SA - not Adelaide	5
Queensland - Far North/Cairns/Townsville	3
QLD - South, not Brisbane	3
WA - not Perth	2
NT Darwin	2
Tas - not Hobart	2

Note: The percentages in the above table add to more than 100% as respondents were allowed to specify more than one office with which they have regular dealings.

The table above shows the main AQIS office with which Horticulture clients liaise. In general, the capital cities dominate as contact offices in 2005 as they did in previous years. With regards to contact by state, almost 2 in 5 respondents (39%) deal with offices in Victoria, both in Melbourne and in regional Victoria.

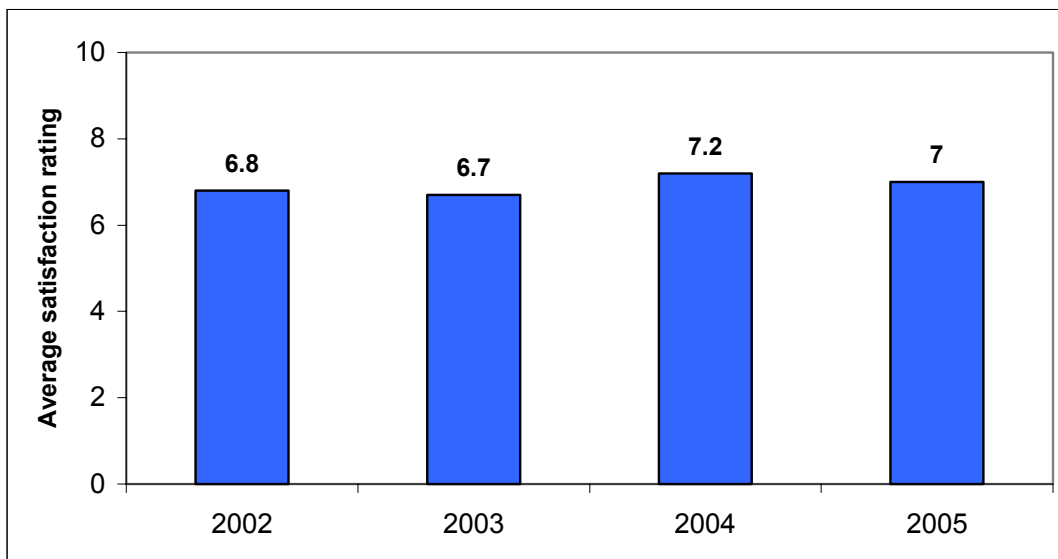
OVERALL SATISFACTION

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 majority of Horticulture clients were satisfied with the overall service provided to them by AQIS, with 83% giving it a rating of 6 or more out of 10.** This is the same level of satisfaction as that achieved in 2004, as shown in the table below.

Level of overall satisfaction with AQIS service (on a scale of 1-10)	2004 % (n = 103)	2005 % (n = 103)
1 (Extremely Dissatisfied)	3	1
2-5	14	16
6-9	77	80
10 (Extremely Satisfied)	6	3
TOTAL	100	100

Respondents’ overall satisfaction with AQIS service was therefore relatively high in 2005, with an **average satisfaction rating of 7 out of 10**. This figure has decreased by 0.2 since 2004 (this is not statistically significant with alpha set at .05). This is the second highest recorded level of satisfaction since 2002.

Horticulture clients – Average rating of Overall Satisfaction with AQIS service



Consistency in satisfaction across AQIS offices

Just 21% (or 22 Horticulture clients) reported that they usually deal with more than one AQIS office. Of these, 13 people said that their level of satisfaction was *consistent* across all the offices they deal with. The number of clients citing particular offices as those they were least satisfied with is too small to report reliably.

Changes in overall satisfaction over the last two years

Reflecting the lack of change in overall satisfaction since 2004, almost half (48%) of the Horticulture clients reported that their satisfaction with AQIS had stayed the same over the past two years. However, almost 2 in 5 (38% and 8% up on 2004 figures) reported improved satisfaction over the last two years whilst about 1 in 8 (12% and 4% up on 2004 figures) said they were now *less* satisfied than two years ago. Overall, these results have therefore not changed significantly since 2004, as shown in the table below.

Change in overall satisfaction over last two years	% (n = 103) 2004	% (n = 103) 2005
Improved	30	38
Stayed the same	58	48
Deteriorated	8	12
Don't know	4	2
TOTAL	100	100

Compared to the 2004 survey *sample*, the proportion of Horticulture clients reporting change in their overall satisfaction over the past two years has increased. In total, 50% reported change this year compared with 38% reporting change last year.

Main factors contributing to *improvement* in satisfaction

Of those (39 Horticulture clients) whose overall satisfaction had improved, most attributed this improvement to two main dimensions of staff service (exact percentages are not reported here due to the small sample size):

- staff are now more responsive when it comes to client needs; and
- staff better understanding business and needs of business.

Main factors contributing to *deterioration* in satisfaction

Of those (12 Horticulture clients) whose overall satisfaction had deteriorated, most cited not enough staff/staff not being available when needed and lack of staff knowledge as reasons for deterioration (though, again exact percentages are not reported here due to the small sample sizes).

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.

Suggested changes to improve service	% (n = 103)
None/no improvements/no changes necessary	18
More staff	10
Reduce fees/improve value for money	10
More flexible/understanding	9
Better trained/more knowledgeable staff/specialist knowledge	9
Consistent rule interpretation	9
Better access to information/updates	8
More efficient/faster processing	8
Closer consultation with industry	7
More accessible/contactable	6
Improved understanding of business/my business	5
Don't know	3
Adopt a team approach/work with us	3
More information/updates	3
More automated quarantine entry processing	1
Other	27

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

The table above shows that, in 2005, the two most popular suggestions for improvement made by one in ten Horticulture clients was for **more staff** and a **reduction in fees/improvement in value for money**. In addition, fewer than 1 in 10 clients called for:

- Better trained and more knowledgeable staff;

- AQIS to be more flexible and understanding ; and
- More consistent rule interpretation.

It should be noted that the call for consistent rule interpretation increased from 5% in 2004 to 9% in 2005. On a positive note, approximately one in six respondents (18%) noted no changes or improvements were necessary (when asked what changes could be made to improve the service they receive from AQIS). This is consistent with the 2004 finding.

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 areas of service that need to be improved.

According to respondents, the four most important attributes of AQIS service are:

- **Staff are responsive to clients' needs;**
- **Staff professionalism;**
- **AQIS's expectations are clear; and**
- **Staff technical competence.**

These attributes achieved an average importance rating of 8.5 or 8.7 (out of 10). This has not changed since last year when the same four service factors came out as most important to Horticulture clients.

Respondents not only thought that these attributes were important, but were also relatively satisfied with these aspects of service – average satisfaction ratings ranged from 6.9 for clear expectations to 7.4 staff professionalism. As in 2004, the highest satisfaction rating of all nine attributes was for staff professionalism.

Other important attributes (which were rated 8 or more out of 10) include AQIS flexibility, perceived value for money and understanding the needs of business. AQIS performed reasonably on these attributes, with average satisfaction ratings ranging from 5.8 to 6.4.

This shows that **AQIS is generally meeting the most important needs of this client group.**

The last column in the table below provides a 'product' of columns 2 and 3 – that is, the average of satisfaction multiplied by importance scores for all Horticultural clients. 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).

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Average rating - Satisfaction x Importance
Responsive to needs	7.0	8.7	61
Staff professionalism	7.4	8.5	63
Expectations are clear	6.9	8.5	59
Staff technical competence	7.0	8.5	59
Flexible	6.4	8.4	54
Understand needs of business	6.4	8.3	53
Value for money	5.8	8.1	47
Adopting team approach	6.2	7.9	49
Timely & accurate invoices	6.9	7.7	53

For Horticulture clients, these final 'satisfaction x importance' scores range from 47 for 'value for money' to 63 for 'staff professionalism'. (The ranking of the nine attributes has not changed since 2004.)

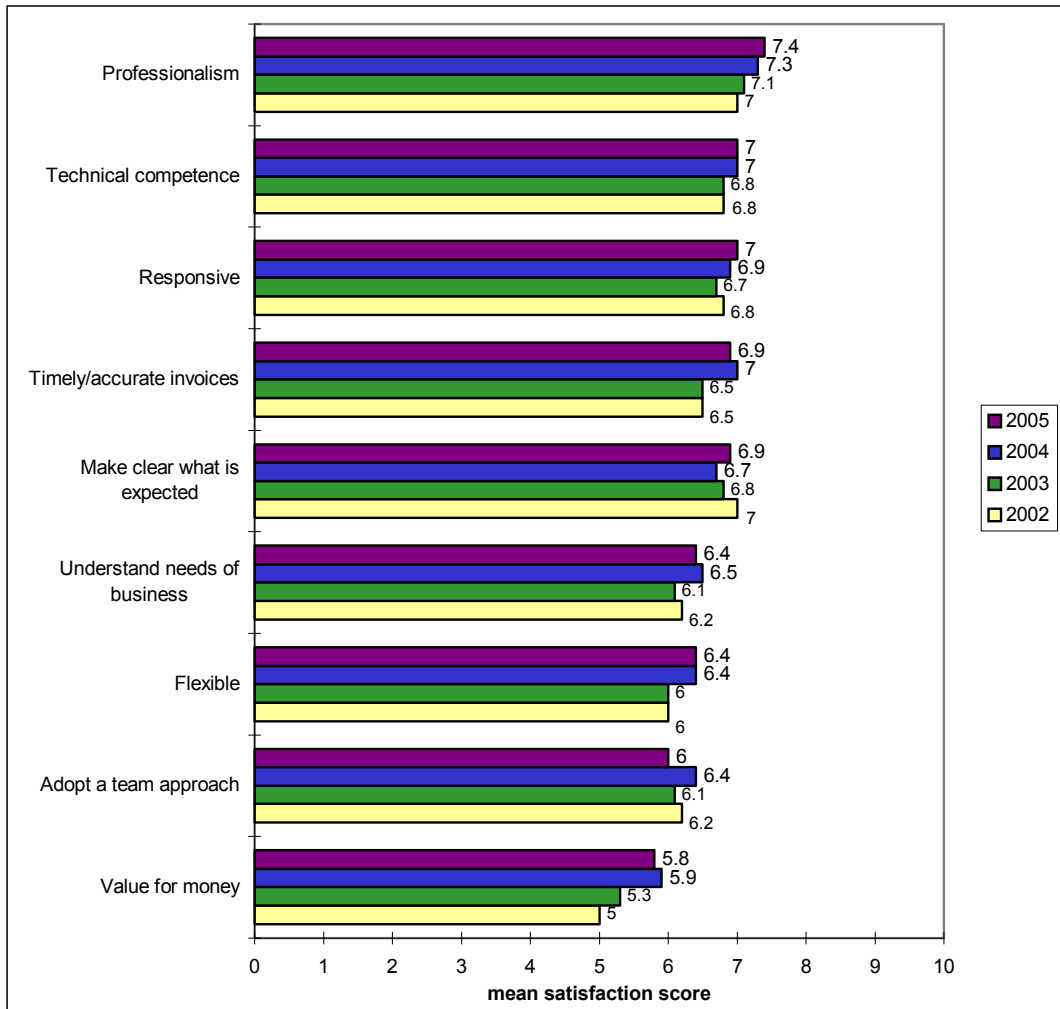
Thus, as we indicated in 2004, Horticulture clients' satisfaction with the specific attributes of AQIS service is generally mid-range, or moderate, and AQIS should aim to improve this. Furthermore, two areas of service achieved a 'product score' below 50 and should be addressed:

- The perception of 'value for money'; and
- Adopting a team approach.

Considering both of these areas were given a relatively high importance rating, but lagged on the satisfaction rating, these are the areas where AQIS needs to address clients' expectations.

Looking at the average satisfaction ratings, the figure below shows that **client ratings of AQIS service have remained generally unchanged since 2004 across the nine AQIS service attributes**. The largest change in satisfaction was a fall of 0.4 points for 'understanding the needs of business', though even this was not a significant decrease.

Horticulture clients – Average satisfaction rating of AQIS service – 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

Generally, Horticulture clients rated staff professionalism very highly in 2005. For instance:

- Almost 9 in 10 felt staff are **very professional**;
- Almost 3 in 4 said staff **adequately explained the QA/CA/Co-reg options**;
- Two in three felt **staff are well trained** and that AQIS staff **help them find solutions**; and
- Almost 7 in 10 *disagreed* that AQIS's sole aim is to raise revenue.

That said, only half felt that the tasks AQIS performs represent value for money (though this represents an increase on 2004 when 43% agreed with this view). Furthermore, there was a 10% decrease in agreement with the view that staff are well trained.

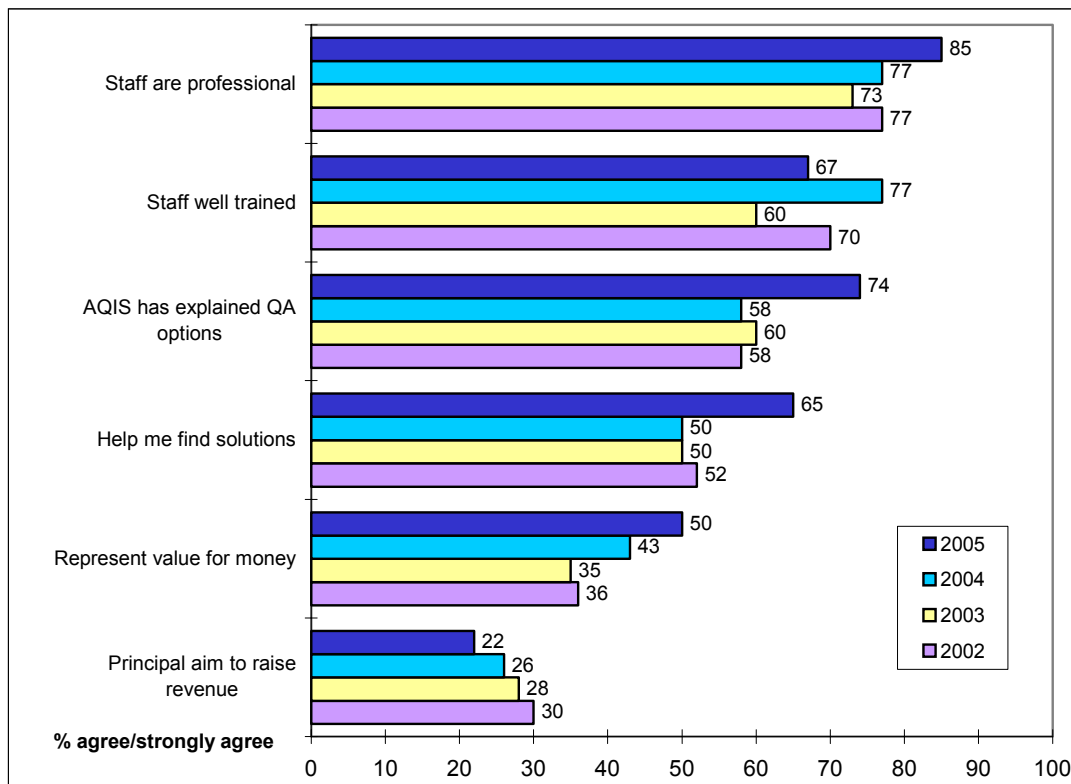
Compared to 2004, however, the movements have been largely positive:

- ❖ **More clients agreed that AQIS staff are very professional** – 77% agreed with this statement in 2004 – agreement increased 8% to 85% in the 2005 survey;

- ❖ **More felt that AQIS has explained QA options** – agreement here increased by 16% since 2004; and
- ❖ **More said that AQIS staff help them find solutions** – 15% increase in agreements since 2004.

Professionalism statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Staff are very professional	85	12	3
Staff well trained	67	20	13
Adequately explained QA/CA/Co-reg options	74	10	16
Helps me find solutions	65	20	13
Tasks AQIS performs are value for money	50	11	39
Aim of AQIS is to raise revenue	22	9	69

Horticulture clients – Ratings of Staff Professionalism – 2002-2005



Integrity of staff

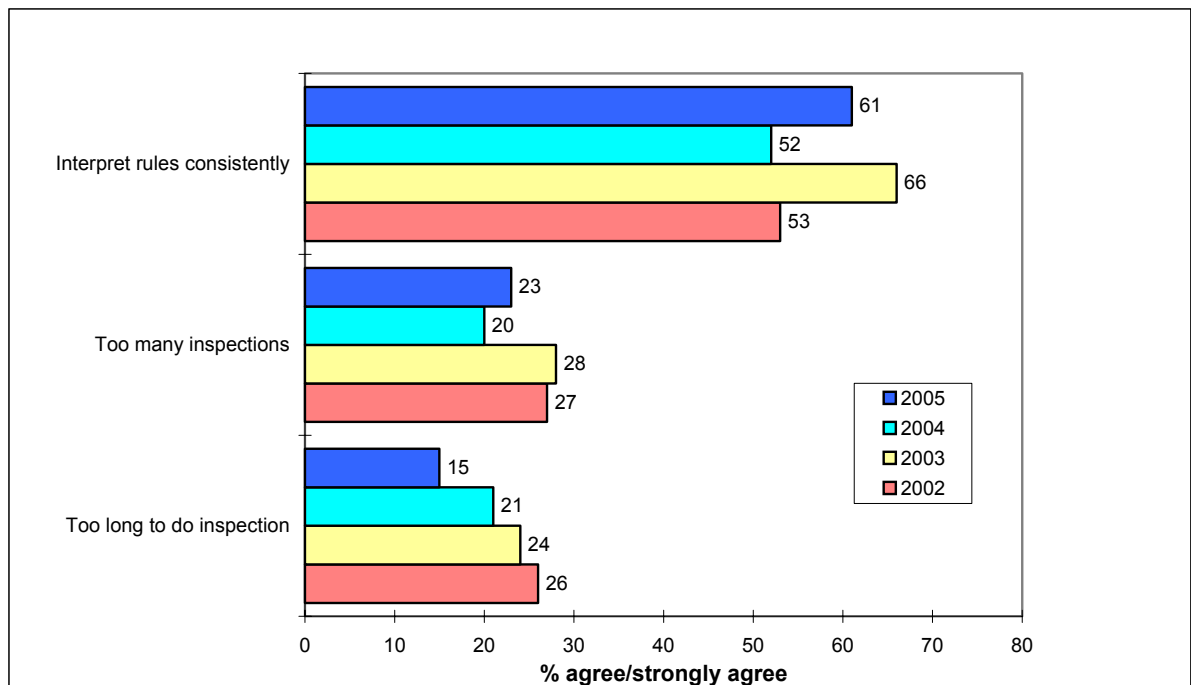
Respondents' ratings of staff integrity improved in 2005. More than 6 in 10 clients felt that:

- ❖ AQIS *does not* conduct too many inspections;
- ❖ Staff *do not* take too long to conduct inspections; and
- ❖ Staff *do* interpret rules and regulations consistently.

It is encouraging that, since 2004, there has been a 9% increase in clients saying that rule interpretation is consistent and a 6% decrease in those saying that inspections take too long.

Integrity statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Staff interpret rules & regulations consistently	61	9	30
Too many inspections	23	14	63
Staff take too long to do inspections	15	21	64

Horticulture clients – Ratings of Staff Integrity – 2002-2005



Openness of staff and of the organisation

Respondents' ratings of the openness of AQIS staff, and of the organisation as a whole, were generally high in 2004. Approximately seven in ten or more clients agreed that:

- ❖ Their requests for assistance are promptly dealt with;
- ❖ They can contact AQIS when needed;
- ❖ AQIS listens to what clients have to say; and
- ❖ AQIS's expectations are clear.

The weakest performing item concerned the level of consultation AQIS conducts with industry. Approximately four in ten Horticulture clients disagreed that AQIS consults enough with industry while just over four in ten agreed.

Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Respond promptly to requests for assistance	80	14	7
Can contact AQIS when needed	78	4	19
Listens	76	10	14
Expectations are clear	73	11	16
Hours of operation reflect needs	67	4	29
Open about how they operate	66	16	19
Consults enough with industry	46	15	40

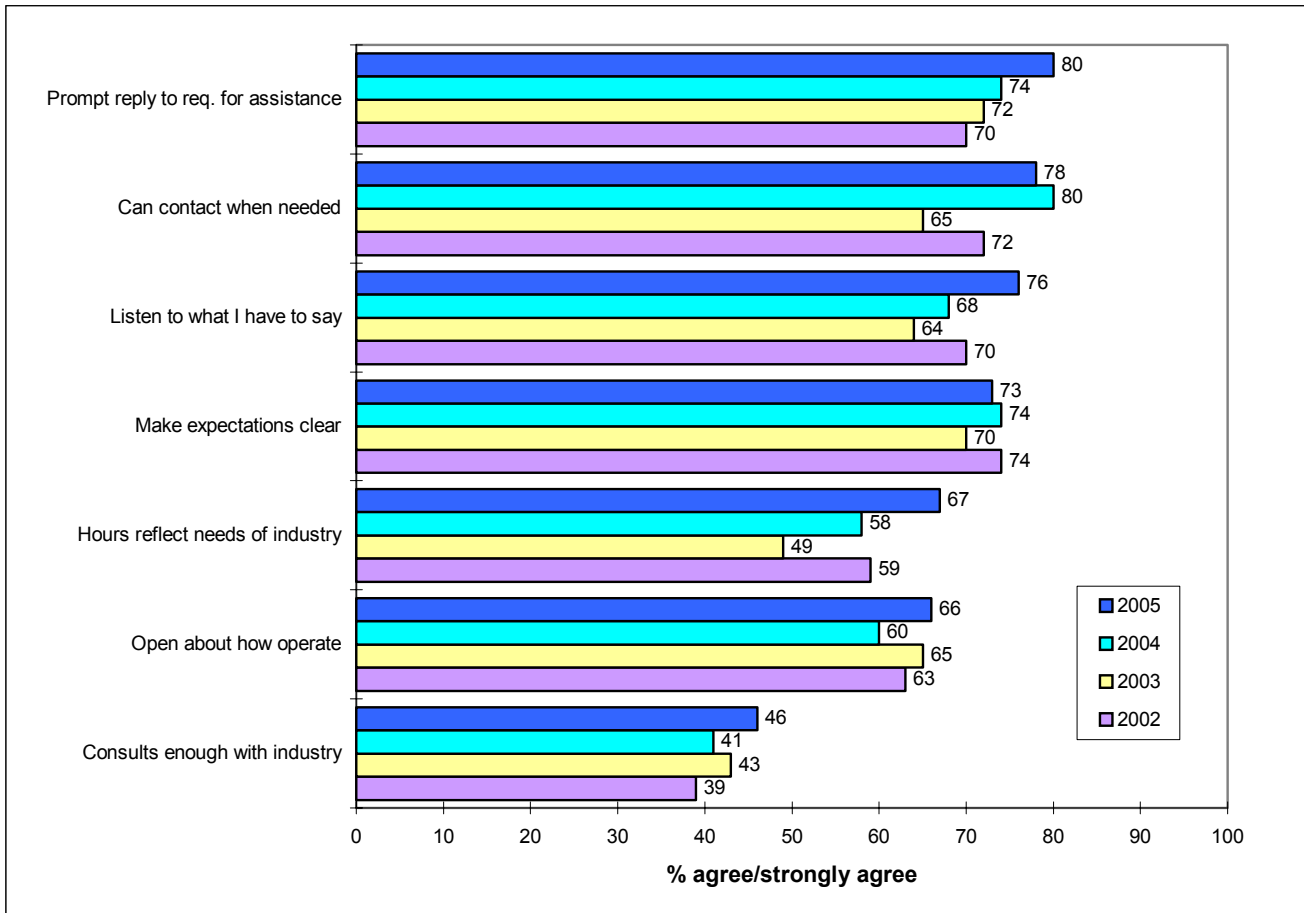
Comparisons with 2004 data (in the figure below) show that there were two (related) notable increases in ratings in 2005. Horticulture clients agreed that:

- ❖ AQIS's opening hours are in line with the needs of their industry (**agreement increased by 9%**, to 67%, and this is on top of a 9% between 2003 and 2004); and that
- ❖ AQIS listens to what they have to say (**agreement increased by 8%**, to 76%).

Clearly, opening hours and feeling that they are being listened to have improved for some Horticulture clients. In fact, three further indices of openness showed slight but **positive increases** –

- ❖ Being open about how AQIS operates (6% increase in agreement);
- ❖ Responding promptly to requests for assistance (6% increase); and
- ❖ Consulting adequately with industry (5% increased agreement).

Horticulture clients– Ratings of Staff Openness – 2002-2005



In summary, the figure above shows that client perception of the openness of how AQIS operates has improved in the last year.

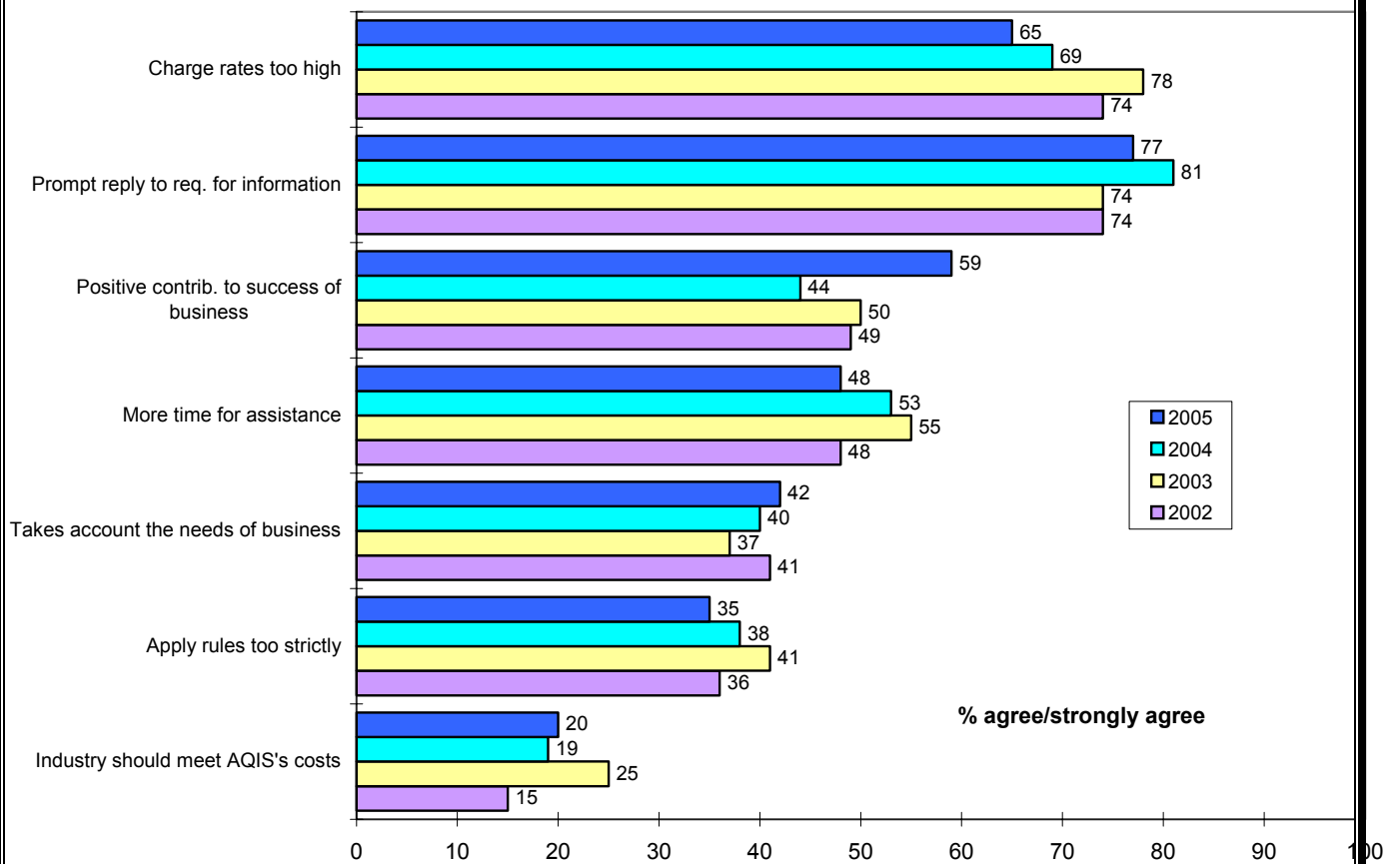
Fairness of staff

In 2005, three in four Horticultural clients (77%) reported that AQIS responds promptly to their requests for information and more than half felt AQIS makes a positive contribution to the success of their business (59%). Now, fewer than half (48%) say that the balance between assisting and policing/ regulating needs to be redressed, feeling that too much of the latter is taking place.

However, a significant proportion of clients (35%) still feel that staff apply rules/ regulations too strictly and disagreed that AQIS takes the needs of business into account (40%). Further, almost two thirds of clients agreed that charge rates are too high.

Fairness statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Responds promptly to requests for information	77	14	10
Charge rates too high	65	20	15
Makes positive contribution to business success	59	17	24
Should devote more time to assistance/less to policing/regulating	48	12	41
Take needs of business into account	42	18	40
Staff apply rules & regulations too strictly	35	15	50
Industry should meet all of AQIS's costs	20	7	73

Horticulture clients – Ratings of Staff Fairness – 2002-2005



While there remains some room for improvement in ratings of staff fairness in the Horticultural client services area, the most notable shift in the survey findings since 2004 is positive in nature:

- The proportion who agreed that AQIS make a positive contribution to the success of their business increased by 15%.

Respect

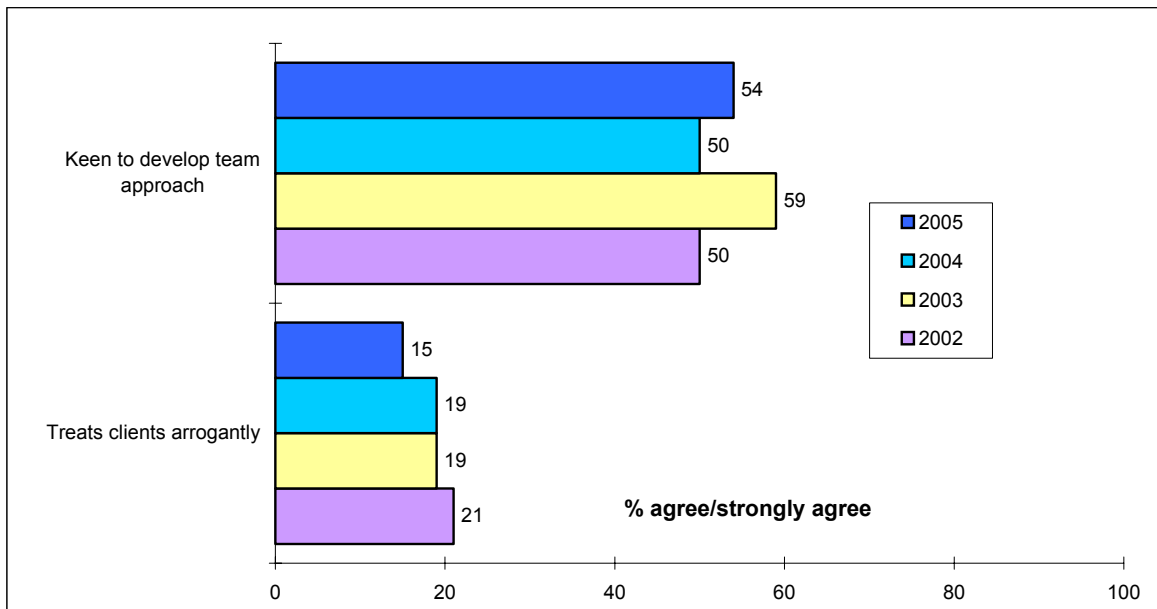
Generally, respondents were satisfied with the respect accorded to them by AQIS staff. Three quarters (75%) *disagreed* that AQIS staff treat their clients arrogantly (up 12% since 2004) and only 1 in 7 (15%) agreed with this view.

More than half (54%) felt that AQIS is keen to develop a team approach with Horticulture clients (up 4% since 2004). However, 1 in 4 (28%) still *disagreed* with this statement.

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

Respect statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Keen to develop team approach	54	18	28
Treats clients arrogantly	15	11	75

Horticulture clients – Ratings of Staff Respect – 2002-2005



BROAD AQIS ISSUES

Primary role and function of AQIS

Primary role & function of AQIS	% (n = 103)
Protect Australia from incoming pests/diseases	31
Facilitate/administer exports	21
Monitor quality of exports	19
Monitor quality of imports	12
Responsible for regulations	4
Facilitate/administer imports	4
Ensure compliance	3
Represent Australia's interests overseas	3
Other	2
Don't know	1
TOTAL	100

Respondents were asked what they perceive to be the primary role and function of AQIS. The predominant view, that AQIS's main role is to protect Australia from incoming pests/diseases (31%) has been maintained since 2001.

Two other perceived primary roles and function of AQIS were also suggested by notable proportions - facilitate/administer exports (21%) and monitor quality of exports (19%).

Value of AQIS Label

Value of AQIS label	% (n = 103)
High value	57
Some value only	18
Low value	8
No value at all	6
Don't know/Depends	6
Not involved in exports	5
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?"

Most respondents (95%) were involved in exports and of these **more than three quarters (79%) felt that the AQIS label does add high or at least some value when it comes to accessing overseas markets. This view has increased since 2004** (when it was expressed by 67%).

FEES/CHARGES AND VALUE FOR MONEY

Rating value for money of AQIS services

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*).

Rating of value for money (on a scale of 1 – 10)	% (n = 103)
1 (Very poor value for money)	3
2-5	41
6-9	54
10 (Very good value for money)	2
TOTAL	100

More than half of the Horticulture clients surveyed (56%) gave AQIS service a 'value for money' rating of 6 or more (out of 10). The average rating of value for money among Horticulture clients was **5.8 out of 10**. The 2004 rating was 5.9 indicating no change in the past 12 months.

A 5.8 rating is a mid-range result, and reinforces previous results in this report, showing that Horticulture clients are generally moderately satisfied that AQIS services provide them with value for money. This is likely to relate to the fact that most feel AQIS cost rates are too high.

Changes to AQIS charges over the last 12 months

Changes to AQIS charges?	% (n = 103)
Increased	30
Stayed the same	28
Decreased	8
Don't know	30
Both increased and decreased	4
TOTAL	100

When asked if AQIS charges had changed over the last 12 months, **3 in 10 clients (30%) reported that charges had increased** – this has not changed since the previous survey (when 30% also reported an increase in charges). Similarly, almost 3 in 10 clients also felt that charge rates had stayed the same and a further three in ten surprisingly reported not knowing whether charges had changed over the last twelve months. These levels have remained relatively unchanged since 2003.

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Respondents were asked whether or not they were aware that AQIS has a Service Charter.

Aware of AQIS Service Charter	% (n = 103)
Yes	11
No	85
Don't know	4
TOTAL	100

The vast majority of Horticulture clients (85%) were *unaware* of the Charter. Only around one-tenth (11%) said that they were aware of the charter – this result has decreased since 2004 when it was 18%. Clearly, **the Horticulture Client Service Area needs to more consistently communicate with clients about the AQIS Service Charter.**

Awareness of Service Standards in the Charter

Of those (11) Horticulture clients that were aware of the Charter, approximately half were aware of the actual standards therein.

How often Service Standards are met

All clients were then 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 = 103) %	"Answers your telephone calls or messages promptly during normal office hours" (N = 103) %	"Responds to your requests for printed information within 5 working days of receipt" (N = 103) %
Always	67	57	52
Often	17	25	24
Sometimes	8	14	8
Rarely	1	3	3
Never	1	0	3
Don't know	6	1	10
TOTAL	100	100	100
Always + Often			
2002	78	76	65
2003	84	80	66
2004	79	85	74
2005	84	82	76

In 2005, 3 in 4 (or more) Horticulture clients said that AQIS 'always' or 'often' met each of the three service standards over the past 12 months (shown in the last row of the table above). In fact, once we delete the segment of 'don't knows' for each of the standards noted above, more than **4 in 5 Horticulture clients report that AQIS 'always' or 'often' met all three service standards over the past 12 months.**

Overall, the likelihood of AQIS meeting these three service standards has remained consistently high or continued to improve slightly (calculated with the 'don't know' segments excluded). Since 2004 there has been no significant change in likelihood of AQIS meeting these high service standards.

AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin	% (n = 103)
Yes	36
No	57
Don't know	7
TOTAL	100

Just over a third of the Horticulture clients (36%) reported receiving the AQIS Bulletin. This figure has **decreased 9%** since the last survey when 45% said they receive the Bulletin.

Amongst those who do receive it, readership of the Bulletin is very high: **80%** of those who do receive it **read every edition** and a further 14% read it every few months. Furthermore, most of those who receive it also read most of it: **77% read half or more of the Bulletin** (only 11% read a quarter or less of it).

Finally, **most of those who receive it judge it to be useful:**

- ❖ 22% say it is very useful; and
- ❖ 54% say somewhat useful.

About 1 in 5 (19%) feel it is of little use while only 5% judge it as 'not at all useful'.

AQIS Website

More than 4 in 5 (83%) of Horticulture clients reported visiting the AQIS website. Website visitation has **increased 17%** since the 2004 survey and 24% since the 2003 survey.

Have you visited the AQIS website	% (n = 103)
Yes	83
No	17
TOTAL	100

Most of those who have visited the website (69%) do so at least monthly:

- ❖ 2% visit daily;
- ❖ 15% visit weekly;
- ❖ 52% visit monthly;
- ❖ 29% visit only once or twice a year;
- ❖ 1% visit once every few years.

Most of those who visit the website (89%) judge it to be useful:

- ❖ 52% say it is very useful; and
- ❖ 37% say somewhat useful.

Only 8% 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 Horticulture clients on the AQIS website.

❖ Other	23%
❖ Exporting plants/grains and horticulture	19%
❖ Phyto	18%
❖ Export facilitation	12%
❖ Icon.....	9%
❖ Import requirements.....	8%
❖ Exporting fish and fish products.....	6%
❖ EXDOC	3%
❖ Fees and charges: Export	2%
❖ Exporting live animals and reproductive material (inc. pets)	2%
❖ Exporting organic and bio-dynamic products	1%
❖ Veterinarians	1%
❖ Forms for Quarantine: Export	1%
❖ Useful links: Export	1%
❖ Elmer2.....	1%

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

SPECIAL INTEREST ISSUES

Obtaining up-to-date information

Horticulture clients were asked if they found the system for obtaining up to date export information for commodities or countries to be problematic.

More than a third of clients (38%) *did* find it problematic to get up to date export information. However, half of the Horticulture clients (50%) *did not* see it as a problem. **The proportion of clients agreeing with this negative statement has increased by 9% since 2004, when 29% agreed – a negative result.**

Horticulture service issue statement	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
The system for getting up to date information is a problem	38	12	50

Peak Organisations that consult with AQIS

Half (50%) of the Horticulture clients were aware of Peak Industry Organisations that consult with AQIS to represent their interests. This represents an increase since 2004 when 35% were aware of such peak groups.

Awareness of Peak Industry Organisations	% (n = 103)
Yes	50
No	47
Can't say	4
TOTAL	100

Of those 51 clients who were aware of these Peak Industry Organisations, most (84%) are currently members of these peak bodies.

Member of Peak Industry Organisations	% (n = 51)
Yes	84
No	16
TOTAL	100

AQIS Approved Co-regulation/QA/Compliance Agreement system

Horticulture clients were asked if they have an AQIS approved Co-regulation, Quality Assurance, or Compliance agreement system in place. Almost half of the clients (48%) reported that they did. This has not changed significantly since 2001.

AQIS Approved Co-regulation/Quality Assurance/ Compliance Agreement system	% (n = 103)
Yes	48
No	52
TOTAL	100

The 50 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 is very knowledgeable about QA/CA/Co-reg systems.

The majority of responses to both of these items were generally positive, as can be viewed in the table below. Furthermore, there has been a **13% increase** in the last year in clients saying that **AQIS is very knowledgeable** about QA/CA or Co-regulation systems.

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 their QA/CA or co-regulation system	65	19	17
AQIS is very knowledgeable about QA/CA or Co-regulation systems	73	10	17

Furthermore, the table below shows that **the vast majority of Horticultural clients (76%) with AQIS approved QA/CA/Co-reg systems believe the QA/CA/Co-reg system is working well.**

Is the Co-regulation/ Quality Assurance/ Compliance system working well?	% (n = 50)
Yes	76
No	24
TOTAL	100

Improvements to QA/CA/Co-reg systems

Clients were asked what improvements they could suggest to the system. Seven in ten (70%) clients reported that they could think of **no improvements** to the QA/CA/Co-reg system. This is a 30% increase on the 2004 figure and is a very positive result indicative of the high rates of satisfaction with the QA/CA/Co-reg systems.

Improvements to QA/CA/Co-reg systems	% (n = 50)
None	70
System needs to be simplified	12
Work more closely with industry and understand industry	10
System should cost less	2
AQIS needs to place more trust in industry	2
Training process needs review	2
Don't know /can't say	24
Other	18

AQIS Permits

Horticulture clients were asked whether they were required to apply for an AQIS permit. Almost two thirds did need to apply for an AQIS permit.

Required to apply for AQIS permit?	% (n = 103)
Yes	64
No	36
TOTAL	100

The large majority of Horticultural clients (81%) who did have to apply for a permit felt that the permit application process was completed within an acceptable (or faster than expected) time-frame. Less than 1 in 5 (19%) felt it took too long.

These figures have not changed since 2004.

Rate the permit application process	% (n = 66)
Faster than expected	8
Acceptable time-frame	73
Took too long	19
TOTAL	100

As the table below shows, **the vast majority of Horticultural clients (80%)** who did have to apply for a permit **felt the permit conditions were clear and easy to understand.**

Were the permit conditions clear and easy to understand?	% (n = 66)
Yes	80
No	15
Don't know/Can't say	5
TOTAL	100

CLIENT COMMENTS

Horticulture clients were given the opportunity to supply an additional comment at the end of the survey. Only 17 clients took up this opportunity and made a total of 30 comments.

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

The detailed comments are outlined in the table overleaf.

Other comments	Frequency of mention (n = 17)
<i>Positive</i> - Good service/Excellent customer service	8
Room to improve/Still need to improve in some areas	4
More staff/regional staff	3
Better customer service	3
Closer consultation with industry	3
Fees too high/need flexible fee structure	2
More accessible staff/when needed	2
Not enough flexibility/negative attitude/over-regulated	2
Need to improve communication/Are not informed of changes/delays etc	1
Clearer guidelines	1
Faster turn around time/delays/Takes too long for items to get through	1
Total	30