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A document prepared for
Australian Quarantine and Inspection Service

**Quarantine Program Clients
2006 Satisfaction Survey
Research Report**

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AQIS CLIENT SATISFACTION SURVEY - 2006 OVERALL REPORT QUARANTINE PROGRAM

INTRODUCTION

The Australian Quarantine and Inspection Service (AQIS) is part of the Australian Government Department of Agriculture, Fisheries and Forestry. The Service is responsible for protecting Australia's animal, plant and human health status and maintaining market access through delivery of quarantine and export services. Over 2,000 staff deliver quarantine and export inspection services across Australia, with the head-office in Canberra.

Since 1995, AQIS has measured client satisfaction using the AQIS Client Satisfaction Survey. The Research Forum was appointed in 2002 to conduct the 2002 to 2004 surveys and was appointed again following another tender process in 2005 to conduct the 2005 and 2006 surveys. The 2002 through 2004 surveys included both Export and Quarantine clients each year. However, in 2005 and 2006 the survey was split as follows:

- AQIS Export clients were surveyed in 2005 and
- AQIS Quarantine clients were surveyed in 2006.

The 2006 survey was conducted from 12 April to 17 May. Clients from six (6) Quarantine Service Lines participated in the 2006 AQIS Client Satisfaction Survey. This report presents the overall findings of the survey, encompassing average results of all quarantine program clients who participated in 2006 (results specific to each service line are reported separately to AQIS).

[Note: 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.]

SURVEY SAMPLE

In total, 1,189 AQIS Quarantine Program clients were contacted by telephone to participate in the 2006 Client Satisfaction Survey. Of these, **1,020 clients** actually participated in the survey, giving an **overall response rate of 86%**. This indicates that there was a very positive response to, and cooperation with, the survey.

This high response rate indicates continued and improved cooperation by AQIS Quarantine Program clients with the survey. The response rate to the survey conducted in 2004 amongst Quarantine Program clients was significantly lower at 71%.

It should be noted that the client lists provided to us by AQIS for the purpose of research contained a sizeable proportion of telephone numbers that were disconnected or where the respondent was not known. Other numbers were residential (rather than business), others went unanswered and yet others were duplicate numbers.

In fact, in total fewer than 50% of the contact numbers provided by AQIS allowed us to invite an eligible potential participant to complete the survey (i.e. 2,738 quarantine client list contact numbers were dialled to make the 1,189 invitations to potential eligible participants). This suggests that **AQIS client lists are becoming more dated.**

OVERALL SATISFACTION

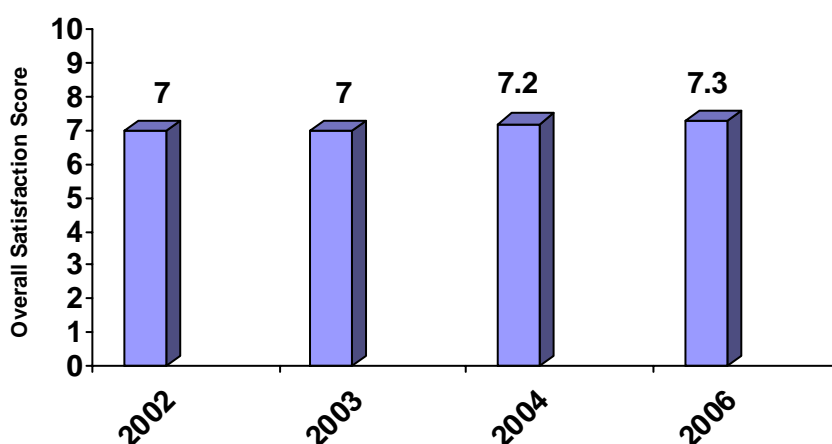
Respondents were asked to rate their overall satisfaction with the service provided by AQIS on a scale of 1 to 10 – 1 being 'extremely dissatisfied', and 10 being 'extremely satisfied'.

The majority of AQIS Quarantine clients were satisfied with the service provided to them by AQIS, with 84% giving it a rating of 6 or more (out of 10). Although results varied across the six (6) quarantine program client service lines, overall satisfaction was generally high, with an **average satisfaction rating of 7.3** (out of 10) in 2006. AQIS has maintained and slightly improved¹ on the high overall satisfaction benchmark set in 2002 (7.0 out of 10). Overall satisfaction in 2006 is similar to that recorded in 2004 (7.2 out of 10).

Level of overall satisfaction with AQIS service (on a scale of 1-10)	% 2004 (N = 1041)	% 2006 (N = 1020)
1 (Extremely Dissatisfied)	2	1
2-5	14	15
6-9	74	75
10 (Extremely Satisfied)	10	9
TOTAL	100	100

The slight increase in average overall satisfaction since 2002 is also demonstrated by the slight change in client proportion split between the negative/positive territory zones: in 2002 and 2003, 82% and 81% of clients respectively gave a satisfaction rating of 6+, compared to 84% in 2004 and 2006 – a positive result.

Quarantine clients – Overall satisfaction with AQIS service – 2002 – 2006



¹ Significant with alpha set at .05.

The table below shows how overall satisfaction in 2006 differs by main office with which clients deal.

Overall satisfaction by main AQIS office with which clients deal

Location of main AQIS office with which Quarantine clients deal	2004 Satisfaction Level (out of 10)	2006 Satisfaction Level (out of 10)
Darwin	*	7.7
WA – not Perth	7.8	7.6
Perth	7.1	7.5
NSW - not Sydney	7.8	7.4
Adelaide	7.5	7.4
Average satisfaction with AQIS	7.2	7.3
Victoria – not Melbourne	7.6	7.2
Melbourne	7.2	7.2
Queensland – Far North/Cairns/Townsville	7.2	7.1
Brisbane	6.9	7.0
Canberra	6.9	6.9
Sydney	7.0	6.8
Queensland – South Qld	*	*
Hobart	*	*
SA – not Adelaide	*	*
Tas – not Hobart	*	*
NT – not Darwin	*	*

* Data not available due to small sample size (i.e. <20).

The table above points to a number of conclusions:

- ❖ Regional and smaller capital city (i.e. Darwin, Perth, Adelaide) offices **generally outperform the larger capital city offices** in client satisfaction;
- ❖ Darwin, Western Australian offices (inside and outside of Perth), New South Wales offices (outside Sydney) and Adelaide offices **showed satisfaction levels above the national average**; and

- ❖ Three offices with **satisfaction significantly below the national average** (though still well within positive territory) were Sydney, Canberra and Brisbane.

Compared with 2004, **three significant changes** have taken place since 2004:

- Perth Offices have improved by 0.4 of a point; while
- Ratings of both the NSW and Victorian offices (outside of Sydney and Melbourne respectively) have decreased by 0.4 of a point.

Consistency in satisfaction across AQIS offices

The majority of AQIS clients (79%) indicated that they usually deal with just one AQIS office. AQIS office contact has become less centralised for clients in 2006 compared to 2004, when 5% more (84%) reported that they usually deal with just one office.

Clients who dealt with more than one AQIS office were asked if their level of satisfaction was consistent across different offices. More than half of this group (13% of the 21%) said that their **level of satisfaction was consistent** across the different offices.

The remaining respondents (8% of quarantine clients), the ones who said that their level of satisfaction varied by office, were most likely to say that they were least satisfied with:

- Sydney (2.3% cited this office);
- Melbourne (1.5%);
- Brisbane (1.3%); and
- Canberra (1.3%).

This is consistent with the fact that these four offices showed lower-than-average levels of overall satisfaction. The main reasons cited for low satisfaction with these offices were:

- Unprofessional service (2.2% cited this reason);
- Inconsistent rule interpretation (1.2%);
- Not enough staff/staff not available (1.1%);
- Bureaucratic/inflexible/faceless staff(1.0%); and
- Lack of knowledge/specific knowledge (1.0%).

Changes in overall satisfaction over the last two years

Respondents were asked if their overall satisfaction with AQIS service has improved, deteriorated, or stayed the same over the last two years.

More than two from five (44%) respondents said that they were as satisfied now, as they were two years ago. Approximately two from five (38%) reported that their overall satisfaction had **improved** over the last two years and only 15% said that they were less satisfied. These figures are similar to the data collected in 2004 (43% said satisfaction had stayed the same, 39% cited improvement and 14% reported deterioration).

Change in overall satisfaction over last 2 years	% 2004 (N = 1041)	% 2006 (N = 1020)
Improved	39	38
Stayed the same	43	44
Deteriorated	14	15
Don't know	4	3
TOTAL	100	100

Main factors contributing to *improvement* in satisfaction

Of those (389 respondents) whose overall satisfaction had improved, approximately one in five attributed this improvement to:

- ✓ **Improved efficiency (21%); and**
- ✓ **AQIS staff being more approachable and communicating better with clients (20%).**

Further, one in ten or more quarantine clients also felt that staff are now:

- Better trained (12%);
- Provide more contact and personal service (12%); and
- Understand business and their business needs (10%).

The core reasons for improved satisfaction have remained largely the same since 2004. However, the proportion attributing improvement to improved efficiency has increased significantly from 11% in 2004 to 21% in 2006.

Main factors contributing to <i>improvement</i>	% 2006 (N = 389)
Improved efficiency	21
More approachable/better communication	20
More contact/personal service	12
Staff are better trained	12
Understand business/business needs	10
Team approach/more flexible	8
More professional	5
More helpful	5
More responsive	2
Introduction of QA	2
Other	1
Don't know	3
TOTAL	100

Main factors contributing to *deterioration* in satisfaction

Of those (156 respondents) who reported that their overall satisfaction had deteriorated over the last two years, the four reasons cited most often (by approximately one in seven or more) were:

- × Not enough staff/staff not being available when needed (23%);
- × Lack of specific knowledge among staff (17%);
- × Unprofessional staff and or service (16%); and
- × Inconsistent rule interpretation (15%).

The core reasons reported for deterioration in satisfaction in 2006 were generally present in similar proportions in 2004. The main difference since 2004 is an increase in the proportion reporting deterioration due to unprofessional staff and or service (up from 9% in 2004 to 16% in 2006) and inconsistent rule interpretation (up from 9% in 2004, to 15% in 2006).

Main factors contributing to <i>deterioration</i>	% 2006 (N = 156)
Not enough staff/staff not available when needed	23
Lack of knowledge/specific knowledge	17
Unprofessional staff/service	16
Inconsistent rule interpretation	15
Bureaucracy/inflexible/faceless	6
Lack of continuity of staff	6
Don't understand business/our business goals	5
Introduction/ implementation of QA	5
Cost	3
Other	5
TOTAL	100

Changes that AQIS could make to improve levels of service

Respondents were also asked (an open-ended question) about improvements that could be made to AQIS services. The table below shows that approximately **1 in 7 (or more) clients suggested five main changes:**

- ❖ More efficiency/faster processing (17%);
- ❖ Having better trained staff with specialist knowledge (15%);
- ❖ More accessible/contactable staff (15%);
- ❖ Having more staff (14%); and
- ❖ Being more flexible and understanding (14%).

These core suggestions were also the main suggestions for improvement reported in 2004. Almost one in five quarantine clients (19%) felt that no changes or improvements were necessary. This figure has also remained consistent with that recorded in 2004.

The largest shifts in the proportions of respondents making specific suggestions since 2004 have been negative in nature and include:

- 6% more clients suggesting AQIS needs to be more flexible and understanding; and

- 6% more clients suggesting AQIS needs to be more accessible and contactable.

Suggested changes to improve service	% 2006 (N = 1020)
More efficient/faster processing	17
Better trained/more knowledgeable staff/specialist knowledge	15
More accessible/contactable	15
More staff	14
More flexible/understanding	14
Consistent rule interpretation	10
Closer consultation with industry	8
Improve understanding of business/my business	7
Reduce fees/improve value for money	6
More information/updates	6
Adopt a team approach/work with us	5
Better access to information/updates	4
More automated quarantine entry processing	2
Other	2
Don't know	7
None/no improvements/no changes necessary	19

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 different client groups, and to improve services to these groups. However, reporting from an overall perspective (i.e. taking the views of all client groups into account) provides a broad overview of the areas of service that are important to AQIS clients generally. This enables AQIS to identify general areas of service that are fulfilling clients' needs, or service gaps that need to be improved.

According to Quarantine clients, the most important attributes of AQIS service are:

- **Staff professionalism; and**
- **AQIS making its expectations clear.**

These two attributes achieved average importance ratings of 8.8 and 8.7 respectively (out of 10). Respondents not only thought these two attributes were most important, but were **also most satisfied with these two aspects of service**. 'Staff professionalism' achieved the highest average satisfaction rating of 7.4 out of 10 and 'clear expectations' achieved the second highest rating of 7.3. Neither of these findings has changed significantly since 2004.

Other important attributes (which achieved average importance ratings of 8 or more out of 10) include:

- ❖ Being responsive to clients' needs;
- ❖ Staff technical competence;
- ❖ Understanding the needs of business;
- ❖ Flexibility; and
- ❖ Timely and accurate invoices.

Overall, AQIS performed relatively well on all these attributes, with average satisfaction ratings ranging from 6.7 to 7.1.

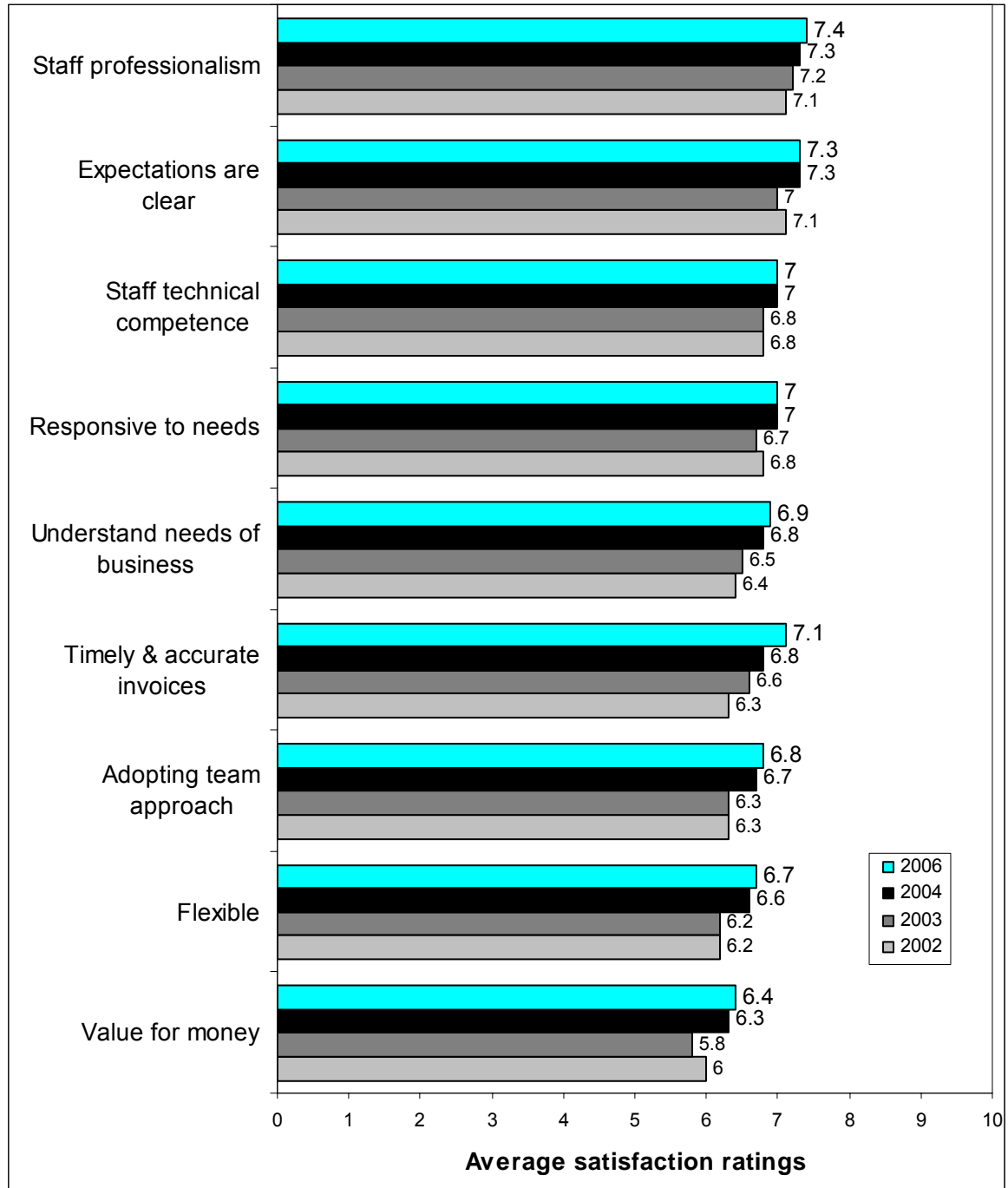
Since 2004, average satisfaction ratings have remained consistent or improved slightly across all nine attributes of AQIS service, a very creditable result.

While six of the nine attributes experienced increased satisfaction ratings since 2004 only one of these increases was statistically significant²:

- Providing timely and accurate invoices (average satisfaction rating increased by 0.3 a point since the last survey period).

All changes in satisfaction are illustrated in the figure below.

Average satisfaction ratings with attributes of AQIS service – Quarantine Programs: 2002 – 2006



² Alpha set at the .05 level

Furthermore, as in prior years, there was a positive relationship between respondents' ratings of importance and their satisfaction with the nine attributes of AQIS service (as shown in the table below). In other words, service was better in areas that were seen as more important by clients. This means that **AQIS is 'on track' and understands client needs, knows what is important, and generally provides it to them.**

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Weighted Satisfaction Gap (i.e. 10 – Satisfaction X Importance)
Staff professionalism	7.4	8.8	23
Expectations are clear	7.3	8.7	23
Responsive to needs	7.0	8.5	26
Staff technical competence	7.0	8.5	26
Understand needs of business	6.9	8.3	26
Flexible	6.7	8.2	27
Timely & accurate invoices	7.1	8.0	21
Adopting team approach	6.8	7.9	25
Value for money	6.4	7.7	28

To identify the AQIS service attributes with the most fertile room for improvement (i.e. where improvement would be most valued by clients) a client centred analysis approach was utilised taking into account both client perceived performance (i.e., satisfaction) and client perceived importance.

In summary, as presented in the last column of the table above we calculated the 'Importance Weighted Satisfaction Gap'. This figure is calculated by subtracting the 'Average Satisfaction Rating' from the 'Maximum Possible Satisfaction Rating' resulting in identification of the 'Satisfaction Gap' (a gap of zero would indicate a perfect satisfaction rating was recorded - i.e., $10 - 10 = 0$, while a satisfaction gap of nine would indicate the lowest satisfaction rating - i.e., $10 - 1 = 9$.)

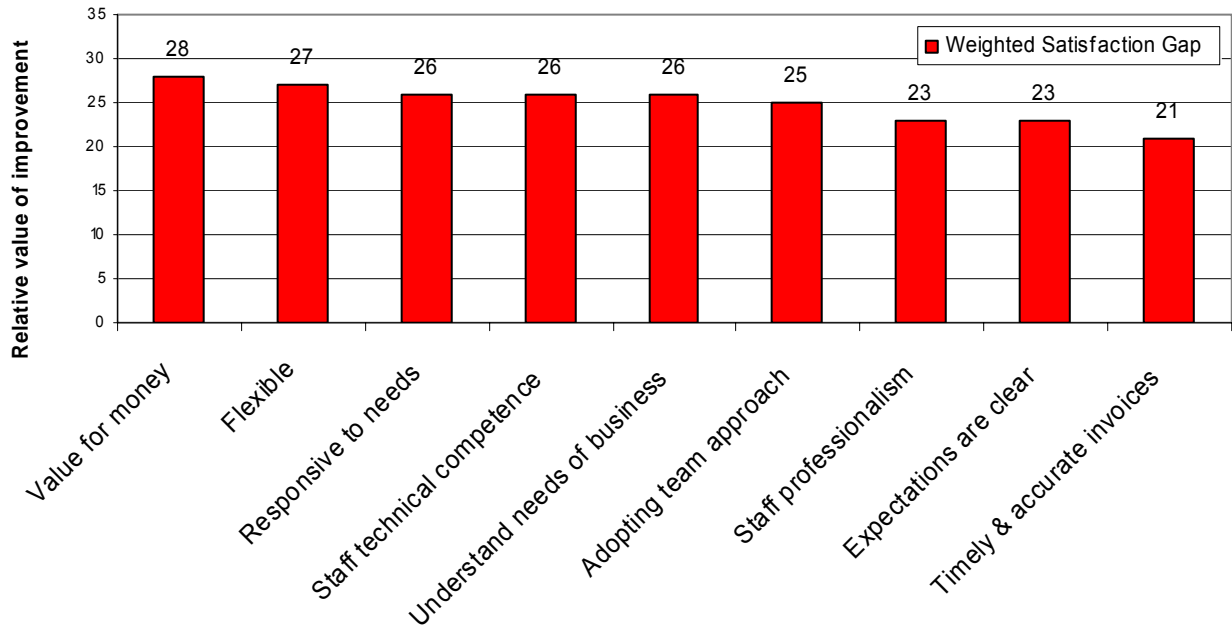
After calculating the Satisfaction Gap this figure was multiplied by the 'Average Importance Rating' providing an 'Importance Weighted Satisfaction Gap' as perceived by the client³.

The Weighted Satisfaction Gap scores presented in the last column of the table above and in the figure below have a potential range from 1 to 90.

Formula: (Maximum Possible Satisfaction Rating - Average Satisfaction Rating) × Average Importance Rating.

Higher scores indicate those service attributes which require most improvement from the point of view of improving overall client satisfaction.

Relative value of improvement across the nine (9) AQIS Service Attributes



The figure above illustrates the attributes, that if improved, will be most appreciated by clients. The range in weighted satisfaction gap scores is somewhat limited (i.e. only 7 points range between highest and lowest scores).

In terms of priorities, while AQIS is performing well overall, considering the tables and figure above and incorporating the significant suggestions for improvement provided by Quarantine clients **we recommend focusing further on staff technical competence, being responsive and flexible to business needs and staff professionalism.**

In general, as service was better in areas that were seen as more important by clients and as the gap between importance and satisfaction measures is largely equivalent, this analysis also supports the conclusion that **the AQIS Quarantine client service area understands client needs, knows what is important to this client group and generally provides it to them.**

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

Overall, two aspects of staff professionalism were rated highly by AQIS Quarantine clients - more than seven in ten agreed that:

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

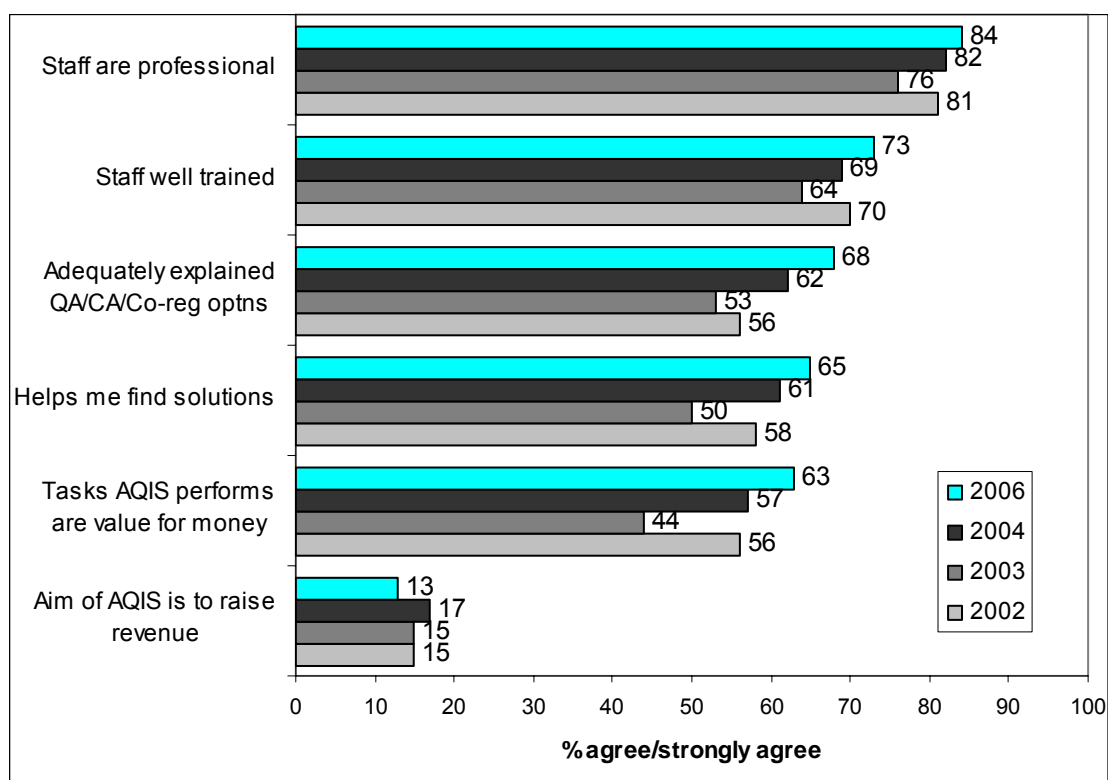
In addition, eight in ten (79%) disagreed that AQIS's main aim was to raise revenue. Just 13% of AQIS clients agreed with this negative view.

In addition, there was moderate support for the following three attributes with between 63% and 68% of Quarantine clients feeling that:

- ❖ Staff adequately explained the Quality Assurance options to them;
- ❖ Staff help clients find solutions to their problems; and that
- ❖ AQIS tasks represent value for money.

Professionalism statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff are professional	84	11	5
Staff well trained	73	13	14
Adequately explained QA/CA/Co-reg options	68	13	19
Help me find solutions	65	17	18
Tasks AQIS performs are value for money	63	14	23
Aim of AQIS is to raise revenue	13	8	79

Ratings of Staff Professionalism – 2002 – 2006



AQIS's ratings on all six professionalism statements **improved slightly** (and significantly) **since 2004**. The 2006 survey found that client agreement with the following five positive views increased:

- o The tasks AQIS performs represent value for money (agreement increased 6%);
- o Staff adequately explained the Quality Assurance options to them (agreement increased 6%);
- o Staff are professional (agreement increased 2% and disagreement decreased 3% to only 5%);
- o Staff are well trained (agreement increased 4%); and
- o Staff help clients find solutions to their problems (agreement increased 4%).

Furthermore, when it came to the negative statement that the 'main aim of AQIS is to raise revenue' agreement decreased by 4%.

Overall, ratings of staff professionalism were positive and slightly improved on 2004 figures, with the majority of AQIS clients being satisfied with this aspect of service ... the most important aspects of service to AQIS clients

Integrity of staff

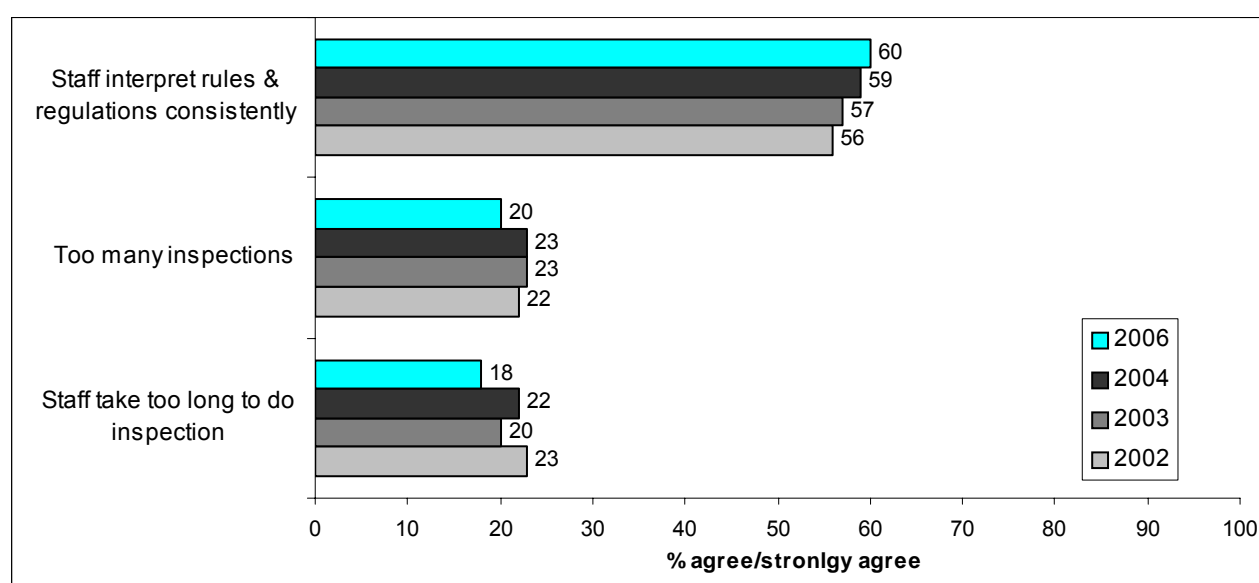
AQIS staff integrity was rated moderately highly by clients across the organisation. Clients were satisfied with the volume of AQIS inspections – approximately two thirds of quarantine clients disagreed that AQIS conducts too many inspections, and that staff take too long to conduct inspections.

However, though the majority of clients overall (60%) agreed that staff interpret rules and regulations consistently, almost a third (32%) actually disagreed. Indeed, the proportion who agreed with this statement varied significantly across the client groups surveyed. As an indication of staff integrity, AQIS should focus on this issue, and **aim to improve consistency of rule interpretation between State offices, and between AQIS officers themselves** possibly through more specialised training relating to each client industry.

As shown in the figure below, these findings have not changed markedly since 2002. The slight changes that have occurred are generally positive in direction. The perceptions concerning whether AQIS staff take too long to do inspections improved *significantly* since 2004 (agreement decreased by 4% and disagreement increased 5%).

Integrity statements	% Agree/ Strongly Agree	% Neither / Don't know	% Disagree/ Strongly Disagree
Staff interpret rules & regulations consistently	60	8	32
Too many inspections	20	16	64
Staff take too long to do inspection	18	14	68

Ratings of Staff Integrity – 2002 - 2006



Openness of staff and of the organisation

On the whole, the openness of AQIS staff and of the organisation generally, were rated highly by clients. The majority of clients (i.e. seven in ten or more) agreed that:

- ❖ AQIS's expectations are clear to clients;
- ❖ Staff listen to them;
- ❖ AQIS is open about how it operates;
- ❖ Staff respond promptly to clients' requests for assistance; and
- ❖ They can contact AQIS when needed.

Approximately two thirds also agreed that AQIS's hours of operation reflect their needs. However, a quarter of clients disagreed with this view. In addition, over half of quarantine clients (56%) agreed that AQIS consults enough with industry.

While ratings are positive in 2006, room for improvement remains with regards to **hours of operation/contactability and industry consultation**. Furthermore, ratings concerning the level of industry consultation decreased slightly in 2006.

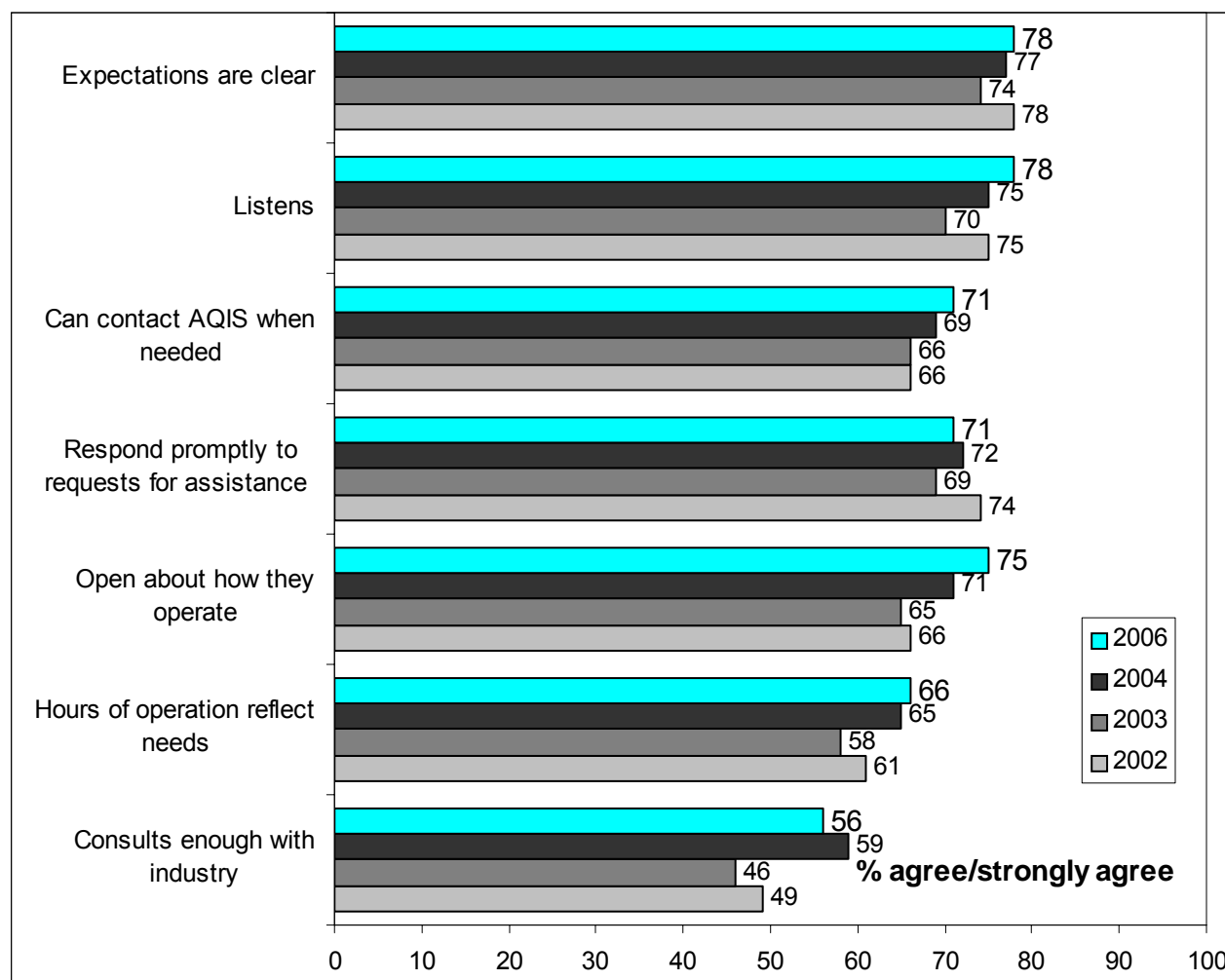
Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Expectations are clear	78	9	13
Listens	78	12	10
Respond promptly to requests for assistance	71	12	17
Can contact AQIS when needed	71	7	22
Open about how they operate	75	13	12
Hours of operation reflect needs	66	8	26
Consults enough with industry	56	20	24

Comparison with 2004 data shows that AQIS's performance has largely remained unchanged. However significant and meaningful improvements have occurred in response to statements around:

- AQIS being open about how it operates (agreement increased 4%); and
- AQIS listening to them (agreement increased 3%).

These increases are shown in the figure below.

Ratings of Staff Openness – 2002 – 2006



Fairness of staff

AQIS Quarantine clients had mixed views on the perceived *fairness* of AQIS staff. Just over seven in ten felt that AQIS staff responded promptly to their requests for information. In addition, there was moderate support concerning a further four fairness indices:

- ❖ Almost six in ten agreed that AQIS takes the needs of their business into account (57% in 2006, up 3% since 2004);
- ❖ One in two agreed that AQIS makes positive contributions to their business success (51% agreed in 2006; 47% in 2004);
- ❖ Over half disagreed that staff apply rules and regulations too strictly (56% in 2006, 49% in 2004); and
- ❖ One in two disagreed that AQIS should devote more time to assistance/less to policing/regulating (48% disagreed in 2006, 42% in 2004).

Also concerning the four indices above, it should be noted that a significant proportion of Quarantine clients in 2006 (one in four or more) agreed with the negative items and disagreed with the positive items.

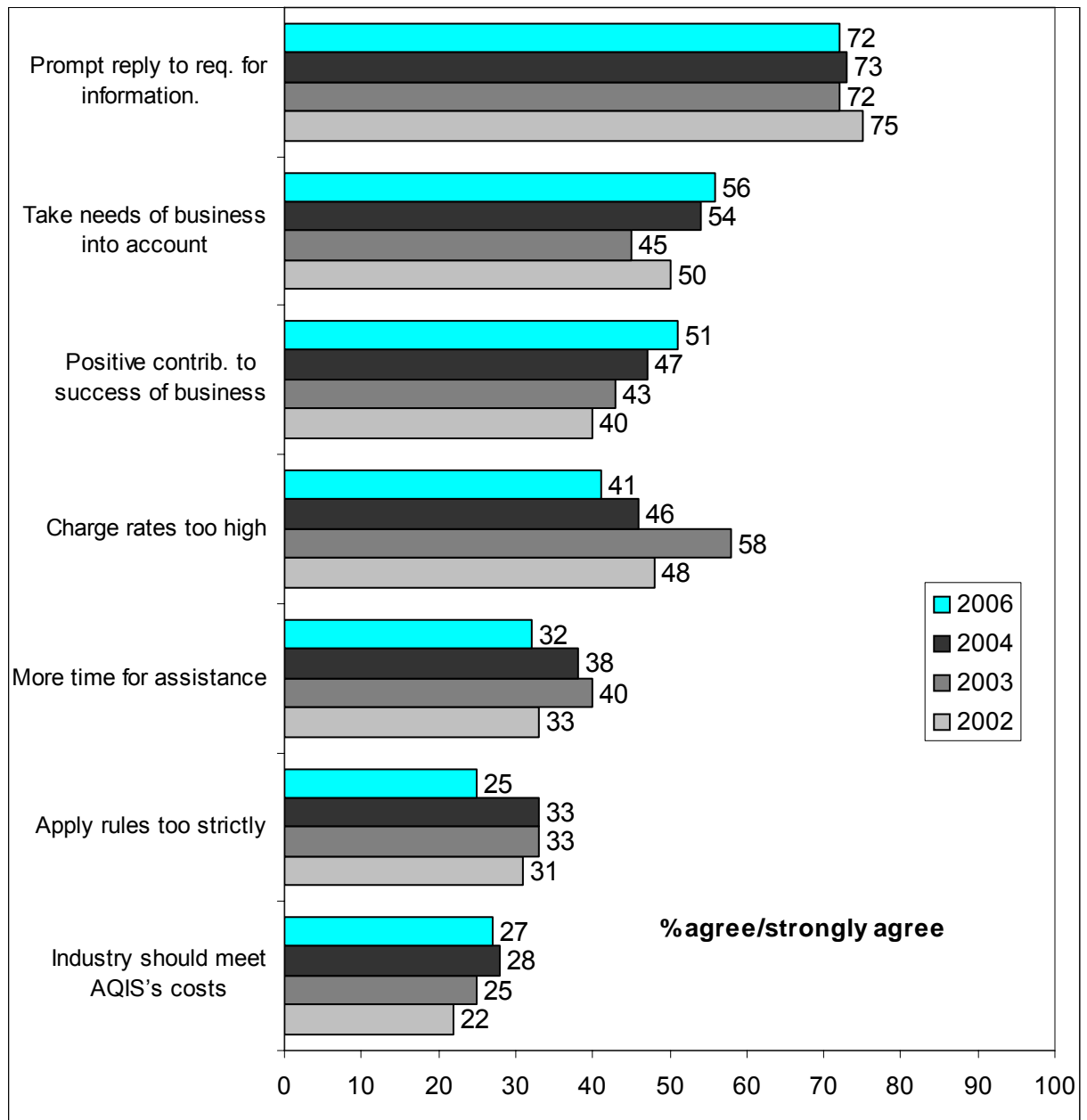
Finally, with regard to AQIS charge rates being too high, approximately equal proportions agreed and disagreed with this statement (41% and 38% respectively). It is noted that while just over a quarter agree that industry should meet all of AQIS's costs more than half disagree.

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	72	11	16
Take needs of business into account	57	19	24
Makes positive contribution to business success	51	21	28
Charge rates too high	41	21	38
Should devote more time to assistance/less to policing/regulating	32	20	48
Staff apply rules & regulations too strictly	25	19	56
Industry should meet all of AQIS's costs	27	15	58

On a positive note and as the figure below shows, **the largest shifts occurring since 2004 are positive in nature.** The changes that have occurred are representative of improvement in satisfaction with perceived AQIS fairness. The three most meaningful (and statistically significant) changes to note are:

- Agreement that staff apply rules and regulations too strictly decreased by 8% since 2004;
- Agreement that AQIS should devote more time to assistance/less to policing/regulating decreased by 6%; and
- Agreement that charge rates are too high decreased by 5%.

Ratings of Staff Fairness – 2002 – 2006



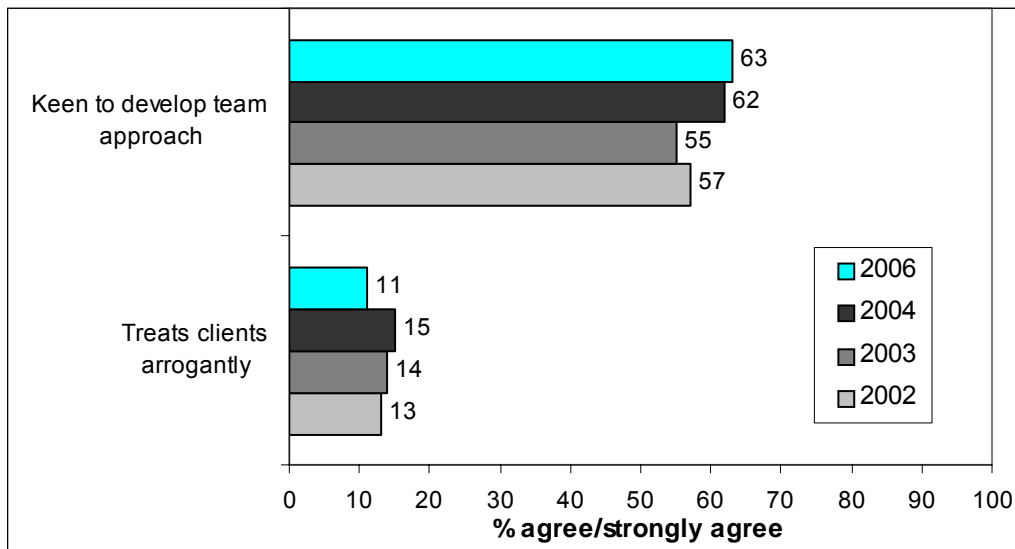
Respect

Overall, clients were **generally positive about the extent to which AQIS staff are respectful towards them**. Four in five quarantine clients (79%) disagreed that AQIS staff treat their clients arrogantly and only approximately one in nine agree. Furthermore, just over three in five clients (63%) felt that AQIS is keen to develop a team approach with industry while only about one in six disagree.

Respect statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Keen to develop team approach	63	21	16
Treats clients arrogantly	11	10	79

As the figure below shows, there has been little change in agreement of note. Positively, the proportion of respondents who agreed that AQIS treats its clients arrogantly has decreased since 2004 by 4%.

Ratings of Staff Respect – 2002 - 2006



DRIVERS OF CLIENT SATISFACTION

This section provides AQIS with detailed guidance on aspects of service delivery that contribute to satisfaction of AQIS Quarantine clients.

The Analysis

As a first step in developing this guidance, we conducted an exploratory analysis of the 25 service attributes presented in the previous section of this report. **Factor analysis** was used to identify the constructs underlying the 25 questions. **Linear Regression** was then used to determine the relative importance of the updated key values in terms of their contribution to Quarantine clients 'overall satisfaction' with AQIS service.

The factor analysis identified three (3) key themes which summarise Quarantine clients' attitudes towards AQIS service in 2006 based on the available 25 attributes of AQIS service. These factors were:

1. Professional and efficient service;
2. Policing, regulatory and inspections role of AQIS; and
3. Value for money and industry consultation/understanding.

These factors are shown overleaf, along with the items (questions) that load on (are correlated with) each one. The factors presented overleaf overlap in part with the old factor structure (i.e. Professionalism, Openness, Integrity, etc) while offering revised constructs/factors that have been created by clearly marking out the statistical 'loadings' of the 25 attributes (questions). The constructs make intuitive sense when considering AQIS services and the context in which Quarantine clients and AQIS operate.

While the table over the page may appear daunting, its implications can be summarised easily:

- ❖ Questions **a-k** all appear to relate to one another (statistically) while not being strongly related to ('loaded on') the other two factors – these questions focus on professionalism and efficiency of AQIS services;
- ❖ Questions **l-q** relate to one another statistically while not being strongly related to the other two factors – these questions focus on AQIS's policing, regulatory and inspections role and how this is balanced with a service-oriented approach; and
- ❖ Questions **r-y** are related statistically and focus on value and consultation with and understanding of industry.

*AQIS Client Satisfaction Survey
2006 Overall Report - Quarantine Program*

Item	Component		
	Note: Loadings < 0.4 have been deleted to aid clarity		
	Professional and efficient service	Policing, regulatory and inspections role	Value and industry consultation/ understanding
a AQIS responds promptly to my requests for assistance	.807		
b AQIS responds promptly to my requests for information	.758		
c AQIS staff interpret rules and regulations consistently	.704		
d I can contact AQIS when I need them	.690		
e AQIS staff are very professional in the conduct of their duties	.667		
f AQIS listens to what I have to say	.656		
g AQIS staff are well trained for tasks required to perform	.650		
h AQIS make it very clear what they expect from me	.633		
i AQIS helps me find solutions to my problems	.554		
j AQIS are very open about how they operate	.553		
k AQIS treats its clients in an arrogant way	.544		
l AQIS do too many inspections or audits		.693	
m AQIS staff apply the rules and regulations too strictly		.640	
n Should devote more time to assistance/less to policing		.639	
o The principal aim of AQIS is to raise revenue		.628	
p AQIS charge rates are too high		.558	.455
q AQIS staff take too long to do an inspection or audit		.481	
r Industry should meet all of AQIS's costs of operation			.600
s The tasks AQIS performs represent value for money			.554
t AQIS consults enough with industry	.433		.509
u AQIS takes into account the needs of business	.509		.502
v AQIS is keen to develop a team approach with industry	.459		.470
w AQIS has adequately explained to me our Quality Assurance/Compliance Agreement or Co-regulation options			.444
x AQIS hours of operation reflect the needs of my industry			.434
y AQIS makes a positive contribution to success of my business	.412		.400

We then conducted a **Regression Analysis** to determine the **relative importance** of these three factors in determining how well (or poorly) clients rate their overall satisfaction with AQIS services. As shown in the table below, the most important factor that contributes to client satisfaction is **providing professional and efficient services**.

Service Factors and Relative Importance to Overall Satisfaction	
Factor	Relative Importance %
Professional and efficient service	59
Value and industry consultation/understanding	29
Policing, regulatory and inspections role of AQIS	12
TOTAL	100

Professional and efficient service is therefore the leading service area which weighs most heavily on perception of overall satisfaction. Next most important is perceived value and industry consultation/understanding, followed by policing, regulation and inspections role of AQIS.

Performance on Service Factors

The table below illustrates satisfaction levels with these three service factors (over time) and their importance in terms of contribution to export clients' overall satisfaction.

Satisfaction Levels for revised Key Values by Survey					
Factor	Relative Importance %	2002	2003	2004	2006
Professional/efficient	59	71	71	73	74
Consultation/understanding	29	62	62	66	67
Policing /inspections	12	66	64	65	67

Satisfaction levels across the three service factors have improved slightly over the last four years.

The key lessons from the table above are that:

- ❖ **Professionalism and efficient service** are most important to overall satisfaction and AQIS has achieved high satisfaction in this regard
→ **MAINTAIN THIS ASPECT AND LEVEL OF SERVICE and improve where possible;**
- ❖ **Industry consultation and understanding** is the second most important to overall satisfaction, and while AQIS has achieved relatively high satisfaction in this regard further lifting performance will lift overall satisfaction.
→ **MAINTAIN THIS ASPECT AND LEVEL OF SERVICE AND ATTEMPT TO LIFT AQIS'S PERFORMANCE;**
- ❖ **Policing and inspections regime** ranks third in driving overall satisfaction and AQIS has achieved relatively high satisfaction in this regard,
→ **MAINTAIN THIS ASPECT AND LEVEL OF SERVICE**

It is predicted that a significant increase in future years in the ratings of the items concerning industry consultation and understanding business needs will likely be followed by a matching significant shift in overall satisfaction.

BROAD AQIS ISSUES

Primary role and function of AQIS

Primary role & function of AQIS	% 2006 (N = 1020)
Protect Australia from incoming pests/diseases	72
Monitor quality of <i>imports</i>	10
Ensure compliance	6
Responsible for regulations	3
Facilitate/administer imports	3
Control/Inspections of Imports/Exports	2
Monitor quality of exports	1
Facilitate/administer exports	1
Other	1
Don't know	1
Represent Australia's interests overseas	1
TOTAL	100

Quarantine Program Clients were asked what they perceived to be the primary role and function of AQIS. Just over seven in ten (72%) felt that AQIS's main role is to protect Australia from incoming pests and/or diseases. One in ten also made specific reference to a role in monitoring the quality of imports (10%).

These views have largely remained unchanged since 2004.

Value of AQIS Label

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?"

One in two (or half of Quarantine program clients) were involved in exports in 2006 (this figure was 48% in 2004). Among those involved in exports, **74% (37%/50%) felt that the AQIS label *does* add high or at least some value when it comes to accessing overseas markets.** Conversely, only

18% of those involved in exports judged the AQIS label to be of no or low value to them.

This positive assessment of the value of an AQIS label has not changed significantly since 2004.

Value of AQIS label	% (N = 1020)
High value	23
Some value only	14
Low value	5
No value at all	4
Don't know/Depends	4
Not involved in exports	50
TOTAL	100

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 = 1020)
1 (Very poor value for money)	2
2-5	31
6-9	60
10 (Very good value for money)	7
TOTAL	100

The majority of respondents (67%) gave AQIS service value for money a rating of 6 or higher out of 10. While not statistically significant, but consistent with earlier reported positive trends concerning charges and value for money, the proportion of Quarantine clients rating value for

money in positive territory has increased by 7% since the last survey. Last, it is noted that a significant proportion of Quarantine clients (one third) rated value for money as 5 or less (out of 10) – i.e. in negative territory.

The average rating of value for money among AQIS Quarantine clients overall was:

- o 6.1 in 2002;
- o 5.8 in 2003;
- o 6.2 in 2004; and
- o **6.4 in 2006.**

This means that, overall, there has been a slight increase in perceived value for money of AQIS services since 2004. While a score of 6.4 is in positive territory and is a mid-range result, towards “good value for money”, there remains considerable room to improve client perceptions around the value for money of AQIS services.

Changes to AQIS charges over the last 12 months

Changes to AQIS charges over the last 12 months	% (N = 1020)
Increased	34
Stayed the same	36
Decreased	4
Don't know	23
Both increased and decreased	3
TOTAL	100

When asked if AQIS charges had changed over the last 12 months, a third **(34%) reported that charges had increased**. Just over a third (36%) reported that charges had stayed the same and fewer than one in twenty reported charges had both increased and decreased. (It is noted that approximately one in four (23%) quarantine client respondents reported not knowing whether AQIS charges had changed over the last 12 months.)

These findings are different to those reported in 2004 as follows:

- o 5% fewer clients in 2006 reported increased charges (39% vs. 34% in 2006);

- o 10% fewer clients in 2006 reported decreased charges (4% vs. 14% in 2006); and
- o 19% more clients in 2006 reported not knowing whether charges had changed (23% vs. 4% in 2006).

Considering the shifts in perceptions concerning changes to AQIS charges since 2004, it is apparent that a slight but real increase in satisfaction with value for money and other indicators concerning perceptions of cost and charge rates has occurred since 2004. For instance, importance and satisfaction ratings of 'value for money' and the proportion who agree that the tasks AQIS performs are value for money, or disagree that charge rates are too high have remained steady or improved. **These results support the view that fee increases and decreases do not necessarily have a direct impact on client satisfaction with value for money ... or indeed the expected effect on overall satisfaction.**

Finally, as close to a quarter (23%) were unsure about changes to AQIS charges over the last 12 months AQIS may need to communicate more with clients about changes (if any) to charge rates to increase levels of awareness.

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Respondents were asked whether or not they were aware of the AQIS Service Charter. Just over eight in ten (**81%**) were **unaware of the AQIS Service Charter**. Only about one in six (16%) Quarantine clients said that they were aware of the Charter. Awareness levels of the Charter have decreased significantly since 2004 (when 24% reported awareness).

If AQIS wants Quarantine clients to be aware of the charter the Client Service Area needs to communicate more consistently with clients about the AQIS Service Charter.

Aware of AQIS Service Charter	% (N = 1020)
Yes	16
No	81
Don't know	3
TOTAL	100

Awareness of Service Standards in the Charter

Of those (161) AQIS Quarantine clients that were aware of the Charter, **more than half (57%) were aware of the Standards entailed in the charter**. Awareness of the service standards in the charter has remained consistent since 2004.

Aware of Service Standards	% (N = 161)
Yes	57
No	40
Don't know	3
TOTAL	100

In summary, while the minority have seen (are aware of) the Service Charter, of those aware of the Charter, the majority are aware of the Standards entailed within the charter.

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. **In 2006, two thirds or more AQIS Quarantine clients overall said that AQIS 'always' or 'often' met each of the three service standards over the past 12 months.**

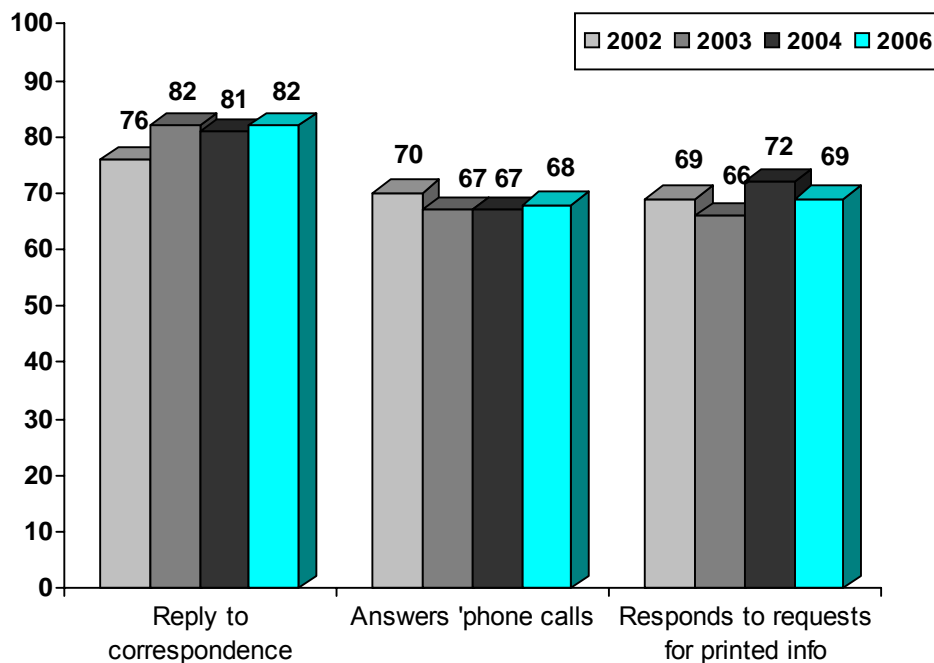
AQIS performance was actually very high with regards to "Replies to your correspondence within 20 working days of receipt..." – this standard was met 'always' or 'often' 82% of the time.

With regards to performance concerning 'responds to requests for printed information...' it is noted that 17% of AQIS quarantine clients reported not knowing whether AQIS 'responds to their requests for printed information...'. If we utilise responses only from respondents who provide an answer other than 'don't know', in other words utilise responses only from those for whom the question was applicable, the likelihood of AQIS meeting this standard in 2006 was actually 83% (as opposed to 69%) – a high achievement rating.

Overall, these results are **positive**. Service standards are being met to equivalent levels for all three services as recorded in 2004.

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 = 1,020)	% "Answers your telephone calls or messages promptly during normal office hours" (N = 1,020)	% "Responds to your requests for printed information within 5 working days of receipt" (N = 1,020)
Always	66	46	49
Often	16	22	20
Always + Often	82	68	69
Sometimes	8	18	10
Rarely	2	8	2
Never	1	4	2
Don't know	7	2	17
Total	100	100	100

% who say AQIS meets each standard 'Always' or 'Often' – 2002-2006



AQIS PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin?	% (N = 1020)
Yes	39
No	59
Don't know	2
TOTAL	100

Approximately three in five AQIS Quarantine clients say that they do not receive the AQIS Bulletin (59%) and about two in five (39%) reported that they do receive the AQIS Bulletin. This has remained unchanged since 2004 when the figure was 38%.

Quarantine program clients who reported receiving the AQIS Bulletin were asked (for the first time in 2006) "how often do you read the AQIS Bulletin?" and "how much of the AQIS Bulletin do you usually read?"

The majority (71%) of Quarantine clients who receive the Bulletin report that they read it every month - **a positive result**. In fact, the large majority (85%) read it at least every few months or more often.

How often do you read the AQIS Bulletin?	% (N = 395)
Every month	71
Every few months	14
Twice a year	4
Once a year	1
Only if I know there's something new there	4
Don't know	6
TOTAL	100

The majority (two thirds) of Quarantine clients who receive the Bulletin report that they read about half or more of the AQIS Bulletin. In fact, **more than a third (36%) of respondents report reading the entire AQIS Bulletin** and three in four (73%) read half or more of it.

How much of the AQIS Bulletin do you usually read?	% (N = 395)
All of it	36
About three quarters of it	14
About half	23
About a quarter of it	14
Less than a quarter of it	7
Don't know	6
TOTAL	100

Quarantine program clients who reported receiving the AQIS bulletin were also asked (for the first time in 2006) "overall, how useful is the AQIS Bulletin to you and to people in your industry?"

More than four in five (82%) clients rated the usefulness of the AQIS Bulletin as 'somewhat' or 'very' useful – a positive result. In fact, three in ten (29%) Quarantine clients rated the AQIS Bulletin as very useful. Conversely, approximately one in six (16%) rated the Bulletin 'of little use' or 'not at all useful' (only 1% rated the Bulletin as 'not at all useful').

Overall, how useful is the AQIS Bulletin to you and to people in your industry?	% (N = 395)
Very useful	29
Somewhat useful	53
Of little use	14
Not at all useful	1
Don't know	3
TOTAL	100

AQIS Website

Just over four in five Quarantine clients (82%) reported visiting the AQIS website (www.aqis.gov.au) in 2006. This figure has increased (by 7%) since 2004, when 75% of respondents reported visiting the website and demonstrates the increasing importance of the website as a way of communicating any number of messages to Quarantine clients.

Have you visited the AQIS website	% (N = 1020)
Yes	82
No	18
TOTAL	100

Quarantine program clients who reported visiting the AQIS website were asked (for the first time in 2006) "how often do you visit the website (www.aqis.gov.au)?" and "which areas of the website do you usually visit"?

Of the Quarantine clients who reported visiting the AQIS website in 2006, the majority (61%) visit the website monthly or more frequently. One in three (32%) visit the site weekly or more frequently while two in five (39%) go to the website only once or twice a year or less frequently.

How often do you visit the AQIS website?	% (N = 832)
Daily	12
Weekly	20
Monthly	29
Once or twice a year	31
Once every few years	2
Only if I know there's something new there	6
Don't know	-
TOTAL	100

The areas of the AQIS website visited by those Quarantine clients reporting to have visited the website are shown in the table below and show the wide range of interests of Quarantine program clients in the AQIS website.

The main website area visited – reported by one in four website using respondents – was related to the Icon/database. The next most popular website areas visited concerned administration issues - reported by about one in ten - forms/guidelines, rules/regulations/restrictions, and permits/applications. One in ten respondents also noted website areas concerning Food, Shipping Vessels and Cargo.

Which areas of the website do you usually visit?	% (N = 832)
Icon /database	25
Rules/regulations/restrictions	11
Forms/guidelines	10
Food	9
Shipping Vessels	9
Cargo	7
Permits / permit application	7
Import conditions / schemes / information	6
Plants/ grains and horticulture	5
Biological products	5
Publications/notices/reports/updates	5
Exporting live animals and reproductive material	4
General information / browsing	4
Treatment providers	4
Quarantine information	3
Fumigation rules / requirements	3
Timber / wood packaging (ISPM 15)	2
Training / courses	2
Other	10
Don't know	6
TOTAL	137

Note: The percentages in the above table add to more than 100%, as respondents were able to list more than one area of the website that they usually visit.

Quarantine program clients who reported having visited the AQIS website were also asked (for the first time in 2006) "overall, how useful is the AQIS website to you and to people in your industry?"

Nine from ten (90%) Quarantine clients rated the usefulness of the AQIS website as 'somewhat' or 'very' useful – a very positive result. In fact, half (49%) Quarantine clients rated the website as very useful. Only one

in thirteen (8%) rated the website 'of little use' or 'not at all useful' (only 1% rated the website as 'not at all useful').

Overall, how useful is the AQIS Website to you and to people in your industry?	% (N = 832)
Very useful	49
Somewhat useful	41
Of little use	7
Not at all useful	1
Don't know	1
TOTAL	100

PEAK ORGANISATIONS

Awareness of Peak Organisations that consult with AQIS

Client awareness of Peak Organisations that consult with AQIS to represent their needs has increased slightly in 2006. In 2006, 43% of all AQIS Quarantine clients were aware of Peak Industry Organisations compared to 36% in 2004.

Awareness of Peak Industry Organisations	% (N = 1020)
Yes	43
No	55
Can't say	2
TOTAL	100

Membership of Peak Industry Organisations

Of those AQIS clients (438 people) who are aware of Peak Industry Organisations representing their interests, the majority (74%) are currently members of this peak body. These figures have not changed since the last survey period (2004).

Currently a member of peak industry body	% (N = 438)
Yes	74
No	26
TOTAL	100

CLIENT COMMENTS

Quarantine program clients were given the opportunity to supply an additional comment at the end of the survey. Approximately one in four (23%) Quarantine clients took up this opportunity.

The following comments noting suggestions for and areas requiring improvement were provided by one in ten or more quarantine clients:

- Need more consistent rule interpretation (16%);
- Need faster turn around time/delays/takes too long for items to get through (14%);
- Need more staff/regional staff (12%);
- Poor training of staff/need improvement of training and specialist staff for our industry (12%); and
- Need more awareness of the market place (11%).

These comments largely echo the explanations provided by Quarantine clients who reported deterioration in satisfaction over the last two years and overlap the suggestions provided by clients concerning changes AQIS could make to improve customer service.

The detailed client comments are outlined in the table below.

It is noted that of all the comments provided, approximately one in six (16%) was positive. Comments made by the equal largest proportion of Quarantine clients were positive and indicated satisfaction with the service provided by AQIS and belief that AQIS is doing a good job.

Other comments	% (N = 239)
Positive - Happy/doing a good job	16
Need more consistent rule interpretation	16
Faster turn around/delays/too long for items to get through	14
More staff/regional staff	12
Poor staff training/need training improvement/specialist staff	12
Need more awareness of the market place	11
Not enough flexibility/negative attitude/over-regulated	8
More accessible staff/accessible when requested/instead of answering machine	8
More flexible hours/contactable outside business hours	8
Work with us/work with industry/closer industry consultation	6
Improve electronic communication/improve computer systems	6
Fees too high/need flexible fee structure	5
More/better/less confusing guidelines	5
Don't understand business/my business	5
Still room to improve	5
Unprofessional/bad customer service	4
Positive - Good service/Excellent customer service	3
Need to work in partnership/Act more like police	3
Positive - Helpful/responsive/easy to deal with	2
Positive - Professional	2
Better billing services/invoicing/accounting	2
Provide more guidelines/detail	2
Positive - Other positive responses	2
Positive - Performs a necessary function/Valuable service	1
Dissatisfied/unhappy	1
Other	7
Total	166

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

CONCLUSIONS

Across all Quarantine program clients, **overall satisfaction with AQIS services is high**. With an overall client satisfaction score of 7.3, the high levels of satisfaction recorded each year since 2002 (7.0 to 7.3) have been maintained. Validating this finding, most clients reported increased or static levels of satisfaction compared with two years ago. The average satisfaction figure of 7.3 shows that AQIS is generally meeting the needs of Quarantine program clients.

Next, we discuss the service areas that are clearly working well for AQIS and issues and areas that will require further attention in the future.

Areas of service that are 'on track'

- ❖ The four most important AQIS service attributes (from nine) are the four service attributes Quarantine clients are most satisfied with – generally indicating that **AQIS is 'on track' and understands client needs, knows what is important, and generally provides it to them**;
- ❖ Quarantine clients are satisfied that **AQIS staff are professional**. Not only was 'professionalism' considered to be the most important attribute of service by clients it also achieved the highest satisfaction rating (of all nine service attributes);
 - 'Professionalism and efficiency of AQIS staff' as a key AQIS service value was shown to contribute most towards overall satisfaction;
- ❖ Clients are also satisfied that **staff are open towards them** (seven in ten felt that staff listen, make their expectations clear, are open about operations, respond promptly to requests for assistance and are contactable when needed), **and respect them** (80% disagreed that staff treat clients arrogantly);
- ❖ Clients are generally **satisfied with the inspection regime** – most do not feel too many inspections are conducted nor that staff take too long to do inspections. The **perceived integrity of AQIS staff however is slightly low** due to only moderate agreement that staff interpret rules and regulations consistently – discussed below;
- ❖ The large majority of Quarantine clients (70% plus) feel that AQIS staff responds promptly to requests for information and assistance;
- ❖ The majority of Quarantine clients that agree AQIS staff adequately explain clients' QA/CA/Co-regulation options and this has also continued to increase in 2006 (53% agreed in 2003, 62% in 2004, and 68% in 2006);
- ❖ Of the two from five clients reporting improvement in overall satisfaction one in five attributed it to **improved efficiency and AQIS staff being more approachable and communicating better with clients**;

- ❖ The large majority of Quarantine clients (74%) feel the **AQIS label/clearance does add value to their products** when it comes to accessing overseas markets;
- ❖ **AQIS is meeting each of the three service Standards entailed in the Charter most of the time for most clients** (i.e. in terms of promptly replying to written correspondence - 82% always or often, answering telephone calls/messages - 68% always or often, and responding to requests for printed information - 83% always or often (when 'Don't Know' is excluded);
- ❖ Charges have increased for a significant proportion of quarantine clients in 2006 while average perceptions concerning value for money/charge rates have remained stable or been positive in nature; and
- ❖ **Overall, there has been a small yet consistent positive trend across the majority of AQIS service attributes and AQIS value areas examined.**

Areas of service that need to be further addressed

- ❖ It is acknowledged that clients are slightly yet consistently more satisfied across AQIS service attributes and customer service values considered in 2006 – a positive result;
- ❖ Customer service areas that we believe hold the most fertile room for improvement, will improve Quarantine Program Clients perceptions of AQIS if addressed and will benefit overall satisfaction ratings are:
 - **staff *technical competence***;
 - **being *responsive and flexible to industry/business needs***; and
 - **staff *professionalism***;
- ❖ **Re staff technical competence - clients are concerned about perceived inconsistencies in rule interpretation across staff.** While the majority (60%) agree that AQIS staff do interpret rules and regulations consistently one in three disagree. To address this important issue, AQIS may need to increase consistency in training and or specialised training relating to each client industry to :
 - Further increase consistency between AQIS inspection officers; and
 - Further increase consistency between State offices.
- ❖ **Re being responsive and flexible to needs** – while the majority (50%+) do agree that AQIS consults enough with industry, takes the needs of business into account and makes a positive contribution to business success, notable proportions (one in four) explicitly disagree;

- **Also related** – while satisfaction levels are positive, relatively speaking notable proportions continue to disagree that they can contact AQIS when needed and that hours of operation reflect industry needs;
- ❖ To increase the weaker performing aspects of Staff Openness and Staff Fairness (noted in the paragraph above) AQIS may benefit by further:
 - **Increasing the level of industry consultation** (improving service in this domain is predicted to improve overall satisfaction) - improve understanding of the practical and day-to-day impacts of AQIS regulations and operations on clients' business; and attempt in these endeavours to
 - make a greater contribution to the success of Quarantine clients business;
 - continue to help businesses to find solutions to import/export-related problems; and
 - further align AQIS hours of operation to suit average business hours;
- ❖ **Re staff professionalism** - while professionalism indices are rated favourably and performance concerning staff professionalism as an attribute of AQIS service is rated most highly (considering this facet is also rated most important) further improvement should always be sought. Further, unprofessional staff and or service was reported by a notable proportion of those experiencing a deterioration in satisfaction as the cause of such deterioration in 2006;
 - Further, higher staff professionalism assists AQIS deal satisfactorily with clients who may believe staff are not available when needed, staff lack specific knowledge, and that there is often inconsistent rule interpretation;
- ❖ If AQIS wants Quarantine clients to be aware of the Service Charter the Client Service Area needs to communicate more consistently with clients about the AQIS Charter; and
- ❖ With regards to performance against service standards, AQIS should attempt to improve performance so far as performance concerns answering clients' telephone calls or messages promptly during normal office hours.

Improvement in the areas highlighted above will lead not only to increases in customer satisfaction with service attributes and with AQIS values at surface level but to a deeper and more genuine level of organisational respect for AQIS and the way it operates.