

THE RESEARCH

FORUM

A document prepared for the
Australian Quarantine and Inspection Service

**2005 AQIS Client Satisfaction Survey
Export Program Overall Report**

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AQIS CLIENT SATISFACTION SURVEY - 2005 EXPORT PROGRAM OVERALL REPORT

1 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. In 2005 and 2006 the survey is being split –

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

The 2005 survey was conducted from 29 August to 9 September. Clients from eight (8) Export Service Lines participated in the 2005 AQIS Client Satisfaction Survey. This report presents the *overall* findings of the survey, encompassing average results of *all* export program clients who participated in 2005 (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.]

2 SURVEY SAMPLE

In total, 817 AQIS Export Program clients were contacted by telephone to participate in the 2005 Client Satisfaction Survey. Of these, **661 clients** actually participated in the survey, giving an **overall response rate of 81%**. This indicates that there was a very positive response to, and cooperation with, the survey. This high response rate indicates continued cooperation by AQIS Export Program clients with the survey. The response rate to the survey conducted in 2004 amongst Export Program clients was a comparable 76%.

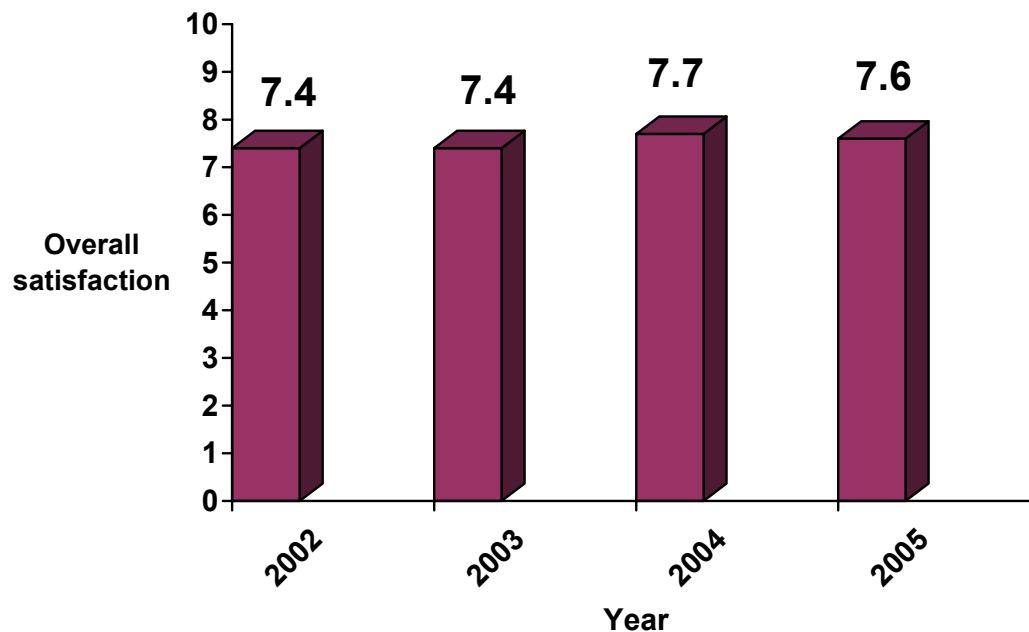
It should be noted that the client lists provided by AQIS contained a notable proportion of disconnected numbers (19%) and residential numbers. As well, the list included telephone numbers of people who do not deal with AQIS and duplicate numbers (11%). These figures suggest the client lists are becoming more dated. In total, 67% of the contact numbers dialled provided an eligible potential participant to invite to complete the survey (i.e. 1,326 export client list contact numbers were dialled to make the 891 invitations to potential eligible participants).

3 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 export program clients were satisfied with the service provided to them by AQIS, with 88% giving it a rating of 6 or more (out of 10).** Although results varied across the eight (8) client service lines, overall satisfaction was generally high, with an **average satisfaction rating of 7.6** in 2005. AQIS has therefore successfully maintained its performance. The high overall satisfaction benchmark set in 2002 has been maintained, as shown in the figure below.

Level of overall satisfaction with AQIS service (on a scale of 1-10)	% (n = 661)
1 (Extremely Dissatisfied)	1
2-5	11
6-9	74
10 (Extremely Satisfied)	14
TOTAL	100

AQIS Export clients – Overall satisfaction with AQIS service – 2002 – 2005



The table below shows how overall satisfaction in 2005 differs by main office with which clients regularly deal.

Overall satisfaction by main AQIS office with which clients deal

Location of main AQIS office with which they deal	2004 Satisfaction Level (out of 10)	2005 Satisfaction Level (out of 10)
NSW - <u>not</u> Sydney	8.2	8.1
Hobart	8.1	8.0
Perth	7.7	7.9
Queensland – South Qld	8.0	7.8
Queensland – Far North/Cairns/Townsville	7.8	7.6
Victoria – <u>not</u> Melbourne	7.4	7.6
Average satisfaction with AQIS	7.7	7.6
Adelaide	7.9	7.4
Sydney	7.2	7.4
Melbourne	7.5	7.3
Brisbane	7.5	7.3
Canberra	7.1	6.9
WA – <u>not</u> Perth	*	*
SA – <u>not</u> Adelaide	*	*
Tas – <u>not</u> Hobart	*	*
Darwin	*	*
NT – <u>not</u> Darwin	*	*

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

The table above points to a number of conclusions:

- ❖ With the exception of Perth and Hobart, **regional offices generally outperform capital city offices** in client satisfaction;
- ❖ **New South Wales offices (outside Sydney), Hobart, Perth, and South Queensland** offices showed satisfaction levels **consistently above the national average**; and
- ❖ Three offices with **satisfaction significantly below the national average** (though still well within positive territory) were **Canberra, Melbourne and Brisbane**.

Very little has changed in this sense since 2004, the largest shift being a decrease in the overall satisfaction rating of export clients who have regular dealings with the Adelaide office (dropping 0.5 of a point from 7.9 to 7.4.).

Consistency in satisfaction across AQIS offices

The majority of AQIS clients (78%) indicated that they usually deal with just one AQIS office. AQIS office contact has become less centralised for clients in 2005 compared to 2004, when 8% more (86%) 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. The majority of this group (15% of the 22%) said that their **level of satisfaction was consistent** across the different offices.

The remaining respondents (7% of all export clients), the ones who said that their level of satisfaction *varied* by office, were most likely to say that they were least satisfied with:

- Canberra (2.6% cited this office);
- Melbourne (1.7%); and
- Sydney (.9%).

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

- Unprofessional service; and
- Inconsistent rule interpretation.

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. Over half the export clients (54%) said that they were as satisfied now as they were two years ago. One third (32%) reported that their overall satisfaction had **improved** over the last two years and only 12% said that they were less satisfied. These figures are similar to the survey results in 2002-2004 (in 2004, 57% said overall satisfaction had remained the same, 30% cited improvement and 10% reported deterioration).

Change in overall satisfaction over last 2 years	% (n = 661)
Improved	32
Stayed the same	54
Deteriorated	12
Don't know	3
TOTAL	100

Main factors contributing to *improvement* in satisfaction

Of those (210 respondents) whose overall satisfaction had *improved*, approximately one in five attributed this improvement to:

- ✓ **AQIS staff being more approachable (23%); and**
- ✓ **AQIS staff communicating better with clients (17%).**

Further, approximately one in ten clients also felt that staff are now:

- better trained (11%); and
- better understand business and business needs (9%).

The reasons for improved satisfaction have not changed substantially since 2004.

Main factors contributing to <i>improvement</i>	% (n = 210)
More approachable/better communication	23
More contact/personal service	17
Staff are better trained	11
Understand business /business needs	9
Improved efficiency	8
Team approach/more flexible	7
More responsive	7
More helpful	6
More professional	2
Introduction of QA	1
Other	7
Don't know	2
TOTAL	100

Main factors contributing to *deterioration* in satisfaction

Of those (76 respondents) who reported that their overall satisfaction had *deteriorated* over the last two years, the three reasons cited most often (by approximately one in six) was:

- ✘ Not enough staff/staff not being available when needed;
- ✘ Bureaucracy/inflexible/faceless; and
- ✘ Lack of specific knowledge among staff.

The core reasons reported for deterioration in satisfaction in 2005 were also present in similar proportions in 2004. The main difference since 2004 is an increase in the proportion reporting deterioration due to bureaucracy/inflexibility and AQIS being seen as 'faceless' (from 8% in 2004, to 17% in 2005).

Main factors contributing to <i>deterioration</i>	% (n = 76)
Not enough staff/staff not available when needed	18
Bureaucracy/inflexible/faceless	17
Lack of knowledge/specific knowledge	16
Inconsistent rule interpretation	7
Lack of continuity of staff	5
Cost	5
Unprofessional staff/service	5
Don't understand business/our business goals	5
Introduction/implementation of QA	3
Other	18
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 10 clients suggested three main changes:**

- ❖ Having better trained staff with specialist knowledge (12%);
- ❖ Being more flexible and understanding (11%); and
- ❖ Having closer consultation with industry (10%).

This last issue is linked to 'Improve understanding of business/my business' (suggested by 6%). 'More staff' was suggested by 1 in 14 respondents (7%) as

too was the related mention for AQIS to be more contactable and accessible (7%).

Almost **one in four Export clients (23%)** felt that **no changes or improvements were necessary**.

In comparison to 2004 survey results, the 2005 core suggestions were made by a larger proportion of respondents as outlined below:

- 5% more clients suggested AQIS needs better trained more knowledgeable staff (increasing 5% in 2005);
- 5% more clients suggested AQIS needs closer consultation with industry (increasing 5% in 2005);
- 4% more clients suggested AQIS needed to be more flexible and understanding;
- 4% more suggested AQIS needed to be more consistent with rule interpretation; and
- 4% fewer suggested AQIS needs no improvements/no changes.

Suggested changes to improve service	% (n = 661)
None/no improvements/no changes necessary	23
Better trained/more knowledgeable staff/specialist knowledge	12
More flexible/understanding	11
Closer consultation with industry	10
Consistent rule interpretation	9
More staff	7
Reduce fees/improve value for money	7
More accessible/contactable	7
Improve understanding of business/my business	6
More information/updates	5
More efficient/faster processing	4
Better access to information/updates	4
Adopt a team approach/work with us	4
Don't know	8
Other	8

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

4 SATISFACTION WITH AND IMPORTANCE OF SPECIFIC 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* export 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 Export clients, **the most important attributes of AQIS service are:**

- ❖ **staff professionalism,**
- ❖ **AQIS making its expectations clear, and**
- ❖ **being responsive to client needs.**

These three attributes of AQIS service achieved an average importance rating of 8.7, 8.6 and 8.6 (out of 10) respectively. Encouragingly, **clients not only thought these three attributes were important, but they were also most satisfied with these aspects of service.** 'Staff professionalism' achieved the highest average satisfaction rating of 7.7 out of 10 and 'responsive to needs' and 'clear expectations' achieved the second and third highest rating (7.4 and 7.3 respectively). 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:

- ❖ Staff technical competence;
- ❖ Understanding the needs of business;
- ❖ Flexibility; and
- ❖ Adopting a team approach.

Overall, AQIS performed relatively well on all these attributes, with average satisfaction ratings ranging from 6.9 to 7.3.

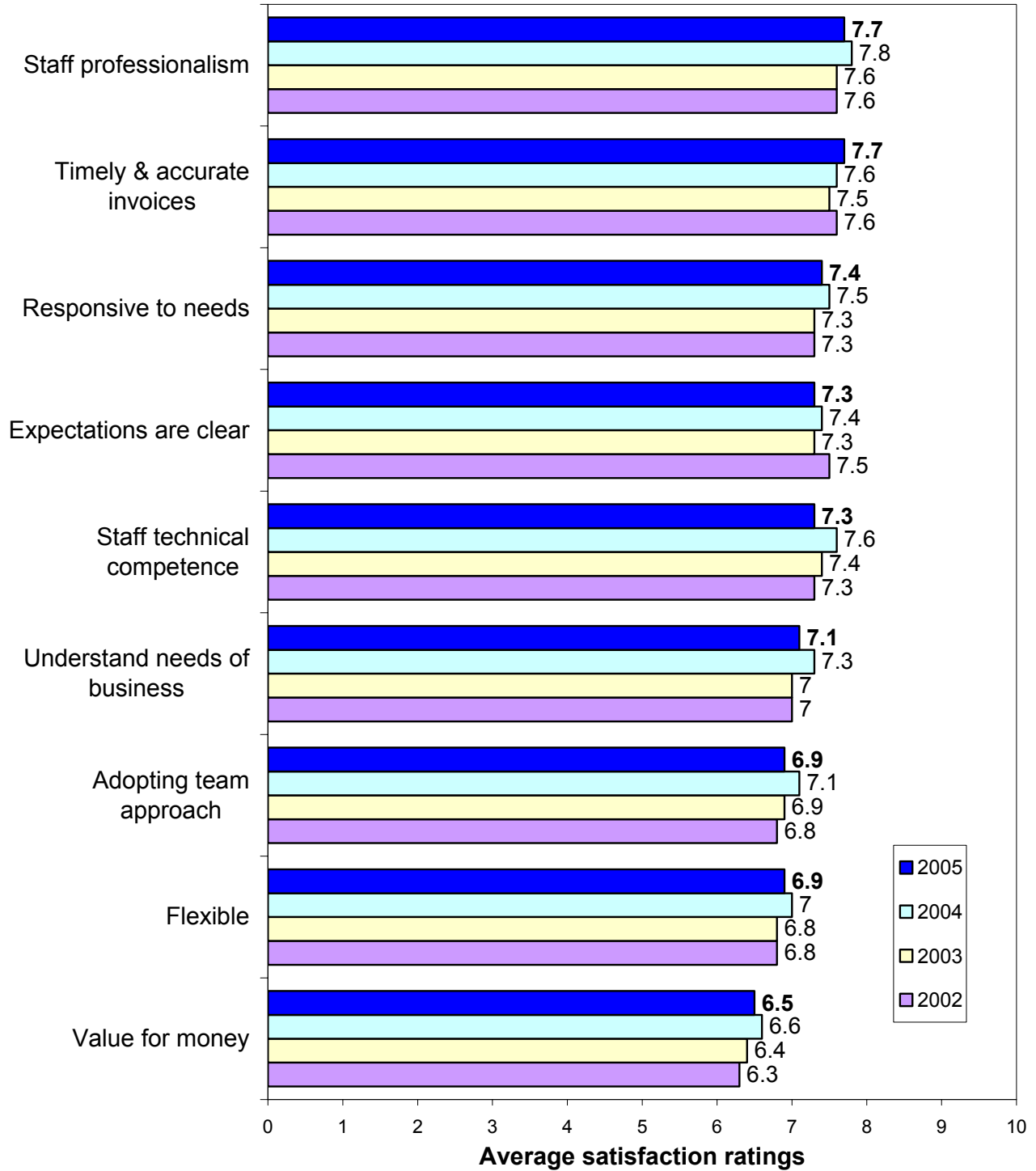
Average satisfaction ratings have remained high in 2005. While not statistically significant, satisfaction ratings have decreased slightly across eight of the nine attributes of AQIS service.

There was only one significant shift in satisfaction ratings since 2004:

- Staff technical competence – average satisfaction rating decreased by 0.3 a point since the last survey (from 7.6 to 7.3 out of 10).

All changes are illustrated in the figure below.

AQIS Export clients – Average rating of satisfaction with attributes of AQIS service – 2002 – 2005



Furthermore, in 2005 (and 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.**

The only exception to the positive relationship is the relative over-performance of AQIS in delivering timely and accurate invoices (i.e. timely and accurate invoices ranks equal second in terms of satisfaction yet ranks ninth – or last - in terms of importance).

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Average rating - Satisfaction x Importance
Staff professionalism	7.7	8.7	67
Responsive to needs	7.4	8.6	64
Expectations are clear	7.3	8.6	63
Staff technical competence	7.3	8.5	62
Understand needs of business	7.1	8.5	60
Flexible	6.9	8.2	57
Adopting team approach	6.9	8.0	55
Value for money	6.5	7.8	51
Timely & accurate invoices	7.4	7.7	57

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

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

For AQIS Export program clients, these final 'satisfaction x importance' scores range from 51 for 'value for money' to 67, for 'staff professionalism'. Therefore, **AQIS clients are generally satisfied with AQIS services – all 'product' scores are 50 or above.**

In terms of priorities, while AQIS is performing well overall, continued improvement should be focused on areas of **flexibility, understanding the needs of business** and **adopting a team approach**. This is of some importance and one way to achieve it is by continued closer **and** deeper, more meaningful consultation with industry.

5 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, four attributes of **staff professionalism were rated highly** by AQIS Export clients. More than seven in ten clients agreed that:

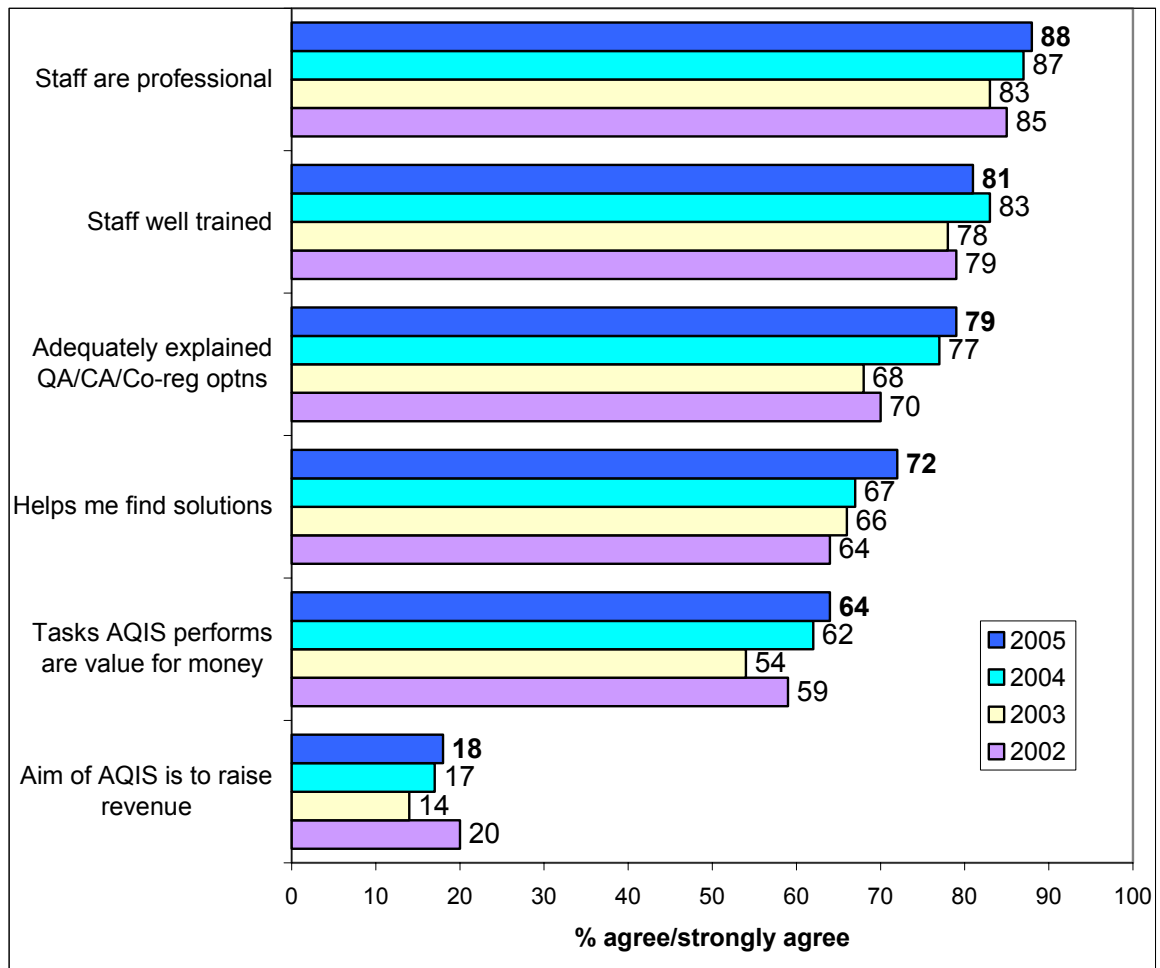
- ❖ Staff are professional (88%);
- ❖ Staff are well trained (81%);
- ❖ Staff adequately explained QA/CA/Co-reg options (79%); and
- ❖ Staff help them find solutions (72%).

In addition, just over seven in ten (72%) *disagreed* that AQIS's aim was to raise revenue (just 18% of clients agreed with this negative view.)

Finally, almost two thirds (64%) of Export clients agreed that AQIS tasks *do* represent value for money.

Professionalism statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff are very professional	88	7	5
Staff are well trained	81	9	10
Adequately explained QA/CA/Co-reg options	79	9	12
Help me find solutions	72	12	16
Tasks AQIS performs are value for money	64	13	22
Aim of AQIS is to raise revenue	18	10	72

AQIS Export clients – Ratings of Staff Professionalism – 2002 – 2005



The figure above shows **one significant positive change** since 2004. In 2005, client agreement that ‘staff help clients find solutions to their problems’ increased by 5%. Clearly, **AQIS staff are finding new ways to help clients solve their export inspection problems.**

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 – **two thirds or more Export program clients disagreed that AQIS conducts too many inspections, and that staff take too long to conduct inspections.**

However, while the majority of clients (64%) agreed that staff interpret rules and regulations consistently, over a quarter (26%) actually *disagreed*. Indeed, the proportion who agreed with this statement varied significantly across the client groups surveyed (i.e. only 44% of Export Meat clients agreed compared with 83% of Fish (vessel based) clients).

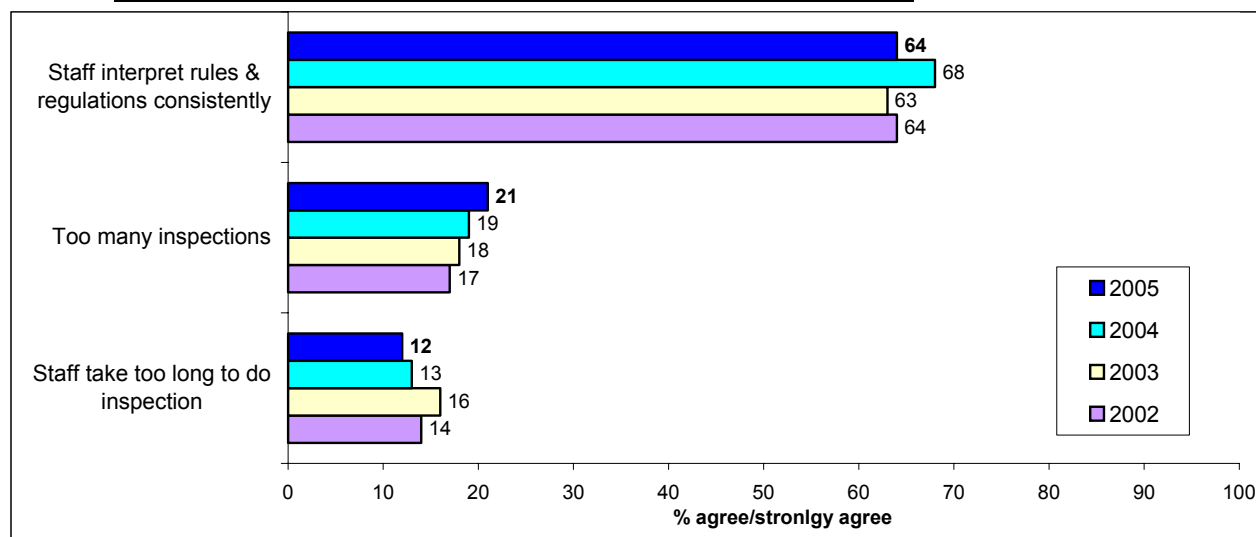
As an indication of *staff integrity*, AQIS should focus on this issue, and **aim to improve consistency of rule interpretation between State offices, and between AQIS officers themselves**, possibly through more specialised training relating to each client industry. This type of training should also aim to increase staff understanding of the industry or industries with which they are dealing.

As shown in the figure below, these findings (and accompanying recommendations) have not changed markedly since 2004 or earlier.

It is noted, however, that the one change since 2004 is negative in direction. While in 2004 some 68% of Export clients agreed that staff interpret AQIS rules and regulations consistently, 4% fewer (64%) agreed with this view in 2005.

Integrity statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff interpret rules & regulations consistently	64	9	26
AQIS do too many inspections	21	12	68
Staff take too long to do inspections	12	12	76

AQIS Export clients – Ratings of Staff Integrity – 2002 - 2005



Openness of staff and of the organisation

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

- ❖ Staff listen to them (81%);
- ❖ Staff respond promptly to clients’ requests for assistance (81%);
- ❖ They can contact AQIS when needed (81%);
- ❖ AQIS’s expectations are clear to clients (79%); and that
- ❖ AQIS is open about how it operates (76%).

Seven in ten also agreed that AQIS’s hours of operation reflect their needs. However, almost a quarter of clients *disagreed* with this view.

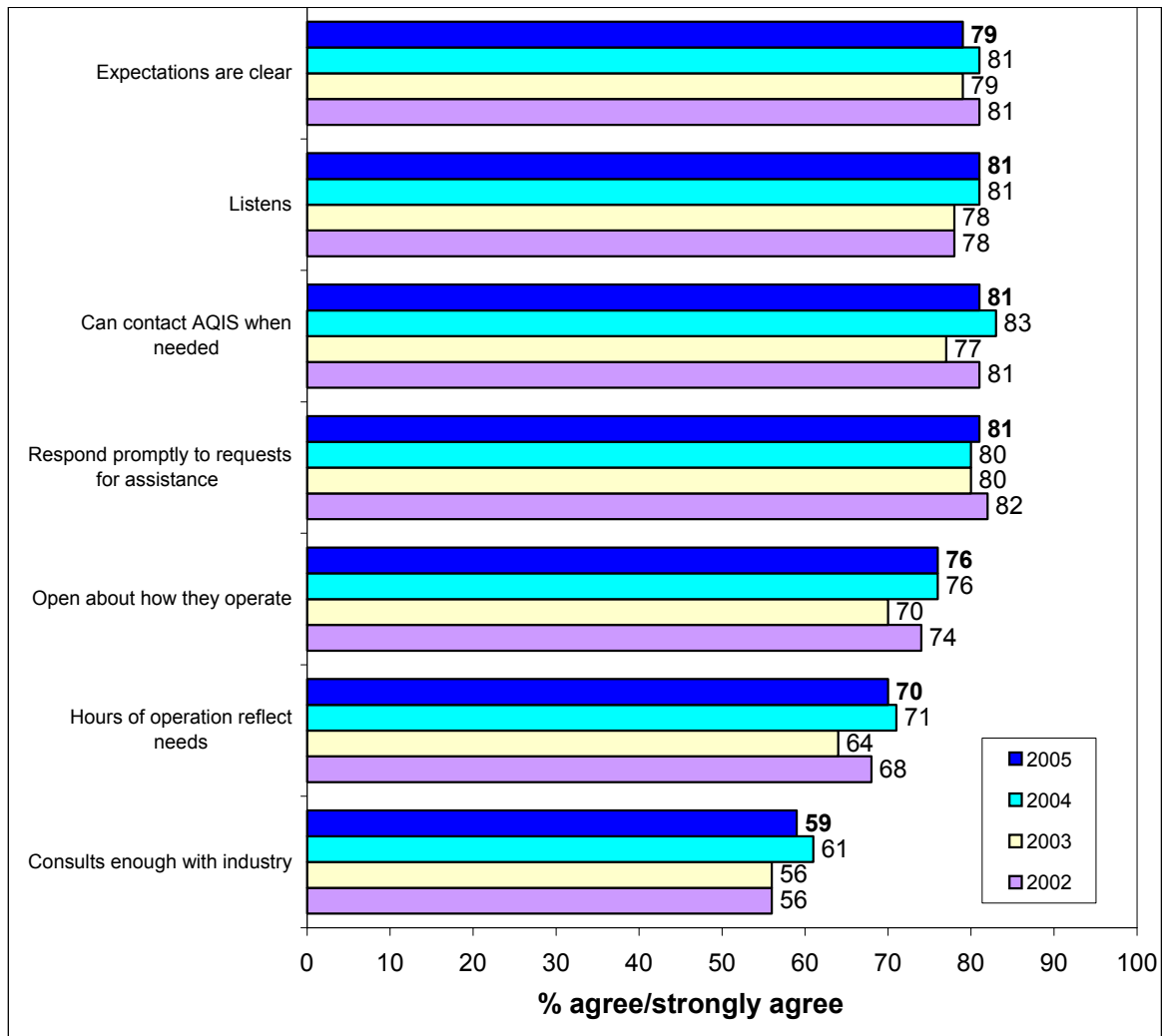
In addition, just under three in five (59%) agreed that AQIS consults enough with industry while over a quarter (27%) disagreed.

Openness statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
AQIS’s expectations are clear	79	7	14
AQIS listens	81	9	11
Responds promptly to requests for assistance	81	9	10
Can contact AQIS when needed	81	5	14

Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Open about how they operate	76	12	13
Hours of operation reflect industry needs	70	7	22
Consults enough with industry	59	15	27

Comparison with 2004 data shows that AQIS's performance on each of the seven openness indices has remained static. No significant shifts have occurred since the last survey, as shown in the figure below.

AQIS Export clients – Ratings of Staff Openness – 2002 – 2005



Fairness of staff

As in past years (2002 through 2004), **AQIS clients in 2005 had mixed views on the perceived fairness of AQIS staff.** The most positive result was that just over 4 in 5 export clients felt that AQIS staff respond promptly to their requests for information (81%). Approximately six in ten respondents also agreed that:

- AQIS makes positive contributions to their business success (66%), however a notable proportion (one in five - 19%) disagreed; and
- AQIS takes the needs of their business into account (61%), while a quarter (25%) disagreed.

Further, almost three in five *disagreed* that staff apply rules too strictly (56%) while over a quarter (28%) agreed.

Almost half feel that AQIS charge rates are too high (48%) while a third disagree (33%); and two thirds *disagree* (68%) that industry should meet all of AQIS's costs.

Finally, as in past years, there is much disagreement among clients regarding whether staff should devote more time to assisting clients, and less to regulating. For just over 2 in 5 clients (43%), the assistance-regulatory balance is right but for another similar proportion (40%) it is too focused on regulation.

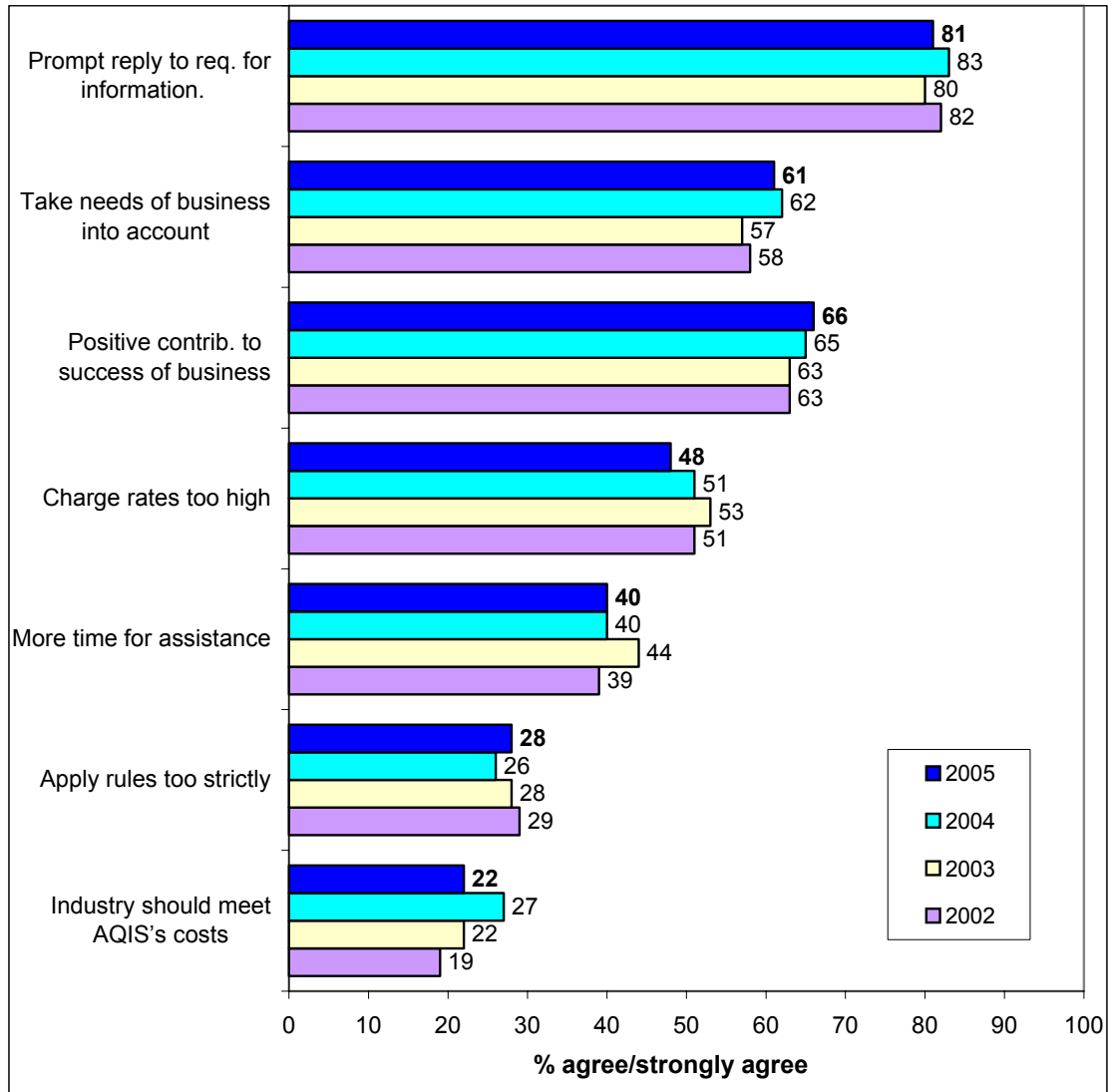
Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	81	8	11
Take needs of business into account	61	14	25
Makes positive contribution to business success	66	15	19
Charge rates too high	48	19	33
Should devote more time to assistance/less to policing/regulating	40	17	43
Staff apply rules & regulations too strictly	28	16	56
Industry should meet all of AQIS's costs	22	10	68

As the figure below shows, there has been little movement in ratings concerning fairness of AQIS staff since 2004 (and in fact since 2002).

Only one statistically significant change occurred in the last year:

- **Agreement** with the positive statement **that industry should meet all of AQIS's costs decreased** by 5% since 2004 (down from 27% to 22%, while disagreement with this view actually increased 12%).

AQIS Export clients – Ratings of Staff Fairness – 2002 – 2005



Respect of staff

Overall, clients were **generally positive about the extent to which AQIS staff are respectful towards them**. Four in five clients (80%) *disagreed* that AQIS staff treat their clients arrogantly. Furthermore, two in three clients (67%) felt that AQIS is keen to develop a team approach with industry.

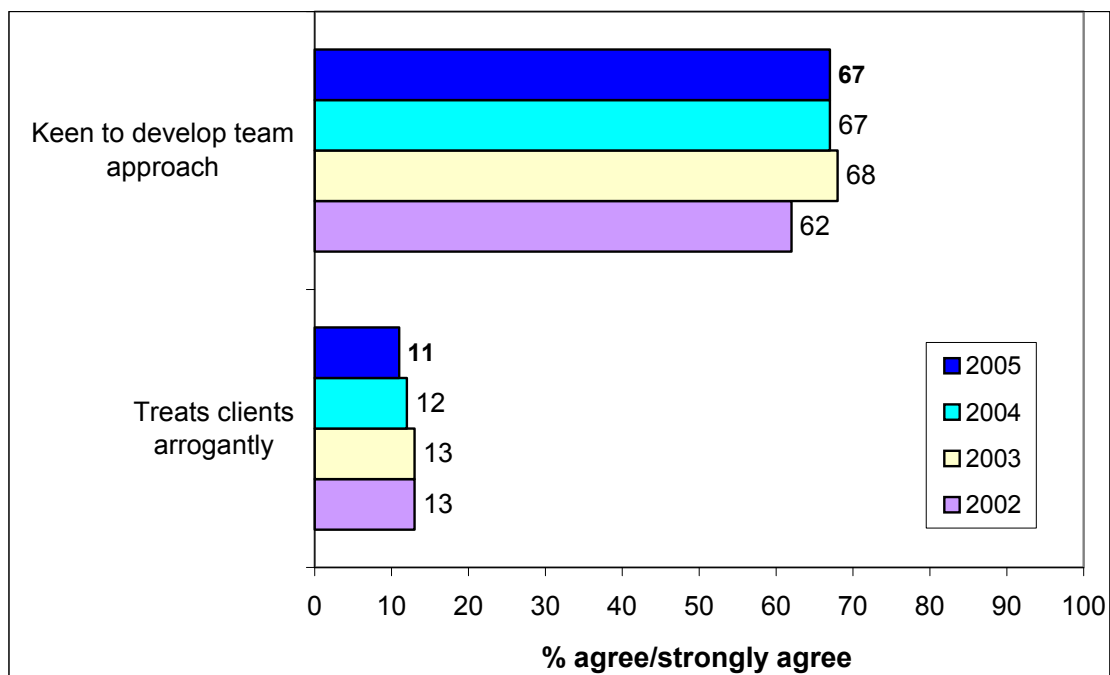
Conversely, one in ten or more clients:

- Disagreed that AQIS is keen to develop a team approach with them; and
- Agreed that AQIS staff do treat clients arrogantly.

Respect statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Keen to develop team approach	67	18	15
Treats clients arrogantly	11	9	80

As the figure below shows, there has been no change in *agreement* of note concerning the respect indices since 2003.

AQIS export clients – Ratings of Staff Respect – 2002 - 2005



6 DRIVERS OF CLIENT SATISFACTION

This is a new section added by The Research Forum for the first time in 2005 to overall AQIS reports. The section provides AQIS with detailed guidance on aspects of service delivery that contribute to satisfaction of AQIS export clients.

The Analysis

As a first step in developing this guidance, we conducted an exploratory analysis of the 25 service attributes presented in section 5 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 Export clients 'overall satisfaction' with AQIS service.

The factor analysis identified five (5) key themes which summarise Export clients' attitudes towards AQIS service in 2005 based on the available 25 attributes of AQIS service. These factors were:

1. Professional and efficient service;
2. Policing and regulatory role of AQIS;
3. Industry consultation/understanding;
4. Availability; and
5. Value for money.

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 clear marking out of statistical 'loadings' of the 25 attributes (questions). The constructs make intuitive sense when considering AQIS services and the context in which 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 four 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 other factors – these questions focus on AQIS's policing and regulatory role and how this is balanced with a service-oriented approach;
- ❖ Questions **r-t** are related statistically and focus on consultation with industry;
- ❖ Questions **u-v** are related statistically and focus on availability to clients; and
- ❖ Questions **w-y** are related statistically and clearly focus on costs and value for money.

*AQIS Client Satisfaction Survey
2005 Export Program Overall Report*

Item	Component				
	Note: Loadings < 0.4 have been deleted to aid clarity				
	Professional and efficient service	Policing and regulations	Industry consultation/ understanding	Availability	Value for money
a AQIS staff are very professional in the conduct of their duties	.760				
b AQIS staff are well trained for tasks required to perform	.742				
c AQIS responds promptly to my requests for assistance	.729				
d AQIS responds promptly to my requests for information	.687				
e AQIS staff interpret rules and regulations consistently	.651				
f AQIS are very open about how they operate	.577				
g AQIS make it very clear what they expect from me	.576		.420		
h AQIS helps me find solutions to my problems	.540				
i AQIS listens to what I have to say	.506		.465		
j AQIS has adequately explained to me our Quality Assurance/Compliance Agreement or Co-regulation options	.496				
k AQIS treats its clients in an arrogant way	.444				
l AQIS do too many inspections or audits		.691			
m AQIS staff apply the rules and regulations too strictly		.672			
n The principal aim of AQIS is to raise revenue		.639			
o AQIS charge rates are too high		.626			.410
p AQIS should devote more time to providing assistance and support to business and less to policing and regulating		.593	.405		
q AQIS staff take too long to do an inspection or audit		.589			
r AQIS is keen to develop a team approach with industry			.709		
s AQIS consults enough with industry			.651		
t AQIS takes into account the needs of business			.535		
u AQIS hours of operation reflect the needs of my industry				.794	
v I can contact AQIS when I need them				.757	
w Industry should meet all of AQIS's costs of operation					.636
x The tasks AQIS performs represent value for money		.428			.517
y AQIS makes a positive contribution to the success of my business					.469

We then conducted a **Regression Analysis** to determine the **relative importance** of these five 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	36
Industry consultation/understanding	25
Policing and regulation	17
Value for money	14
Availability	8
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 Industry Consultation**, followed by Policing and regulation and Value for money. Availability, on the whole, is of lesser importance when it comes to Export clients' overall satisfaction.

Performance on Service Factors

The table below illustrates satisfaction levels with these five 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	2005
Professionalism	36	75	74	77	76
Consultation	25	67	68	71	68
Policing	17	62	63	61	61
Value	14	61	61	64	63
Availability	8	73	71	75	73

Satisfaction levels across these five service factors have been largely stable over the last four years.

The key lessons from the table above are that:

- ❖ **Professionalism and efficient service** are the most important to overall satisfaction and AQIS has achieved high satisfaction in this regard
→ **MAINTAIN THIS ASPECT AND LEVEL OF SERVICE;**
- ❖ **Availability** is least important to overall satisfaction, and AQIS has achieved relatively high satisfaction in this regard
→ **MAINTAIN THIS ASPECT AND LEVEL OF SERVICE;**
- ❖ **Value, fees and charges** rank low in driving overall satisfaction, and despite attempts to lower fees over the years, satisfaction has remained stagnant on this dimension over the years
→ **FURTHER ATTEMPTS TO LOWER COSTS WILL NOT LIFT OVERALL SATISFACTION, MAINTAIN;**
- ❖ **Industry consultation and understanding** is going to be the key to further lifting overall satisfaction; this is the second most important factor in contributing to overall satisfaction but ranks third in client satisfaction ratings in 2005;
→ **LIFT AQIS'S PERFORMANCE IN INDUSTRY CONSULTATION AND UNDERSTANDING**, as indicated previously perhaps through more specialised training relating to each client industry, and with this type of training also aiming to increase staff understanding of the industries with which they are dealing, thus taking the needs of business into account and working like a team; and
- ❖ **Policing and regulatory role of AQIS** is going to be the second key to further lifting overall satisfaction; this is the third most important factor in contributing to overall satisfaction but ranks last in client satisfaction ratings in 2005;
→ **LIFT AQIS'S PERFORMANCE IN BALANCING THE POLICING AND SERVICE ROLES**; this translates to greater flexibility in application of rules and regulations as well as fewer inspections/audits that are conducted more speedily.

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

7 BROAD AQIS ISSUES

Primary role and function of AQIS

Primary role & function of AQIS	% (n = 661)
Protect Australia from incoming pests/diseases	24
Monitor quality of <i>exports</i>	23
Facilitate/administer <i>exports</i>	15
Ensure compliance	11
Responsible for regulations	9
Monitor quality of <i>imports</i>	9
Facilitate/administer <i>imports</i>	3
Don't know	2
Represent Australia's interests overseas	2
Other	2
TOTAL	100

Export Program Clients were asked what they perceived to be the primary role and function of AQIS. Approximately one in four export clients felt that AQIS's main role and function is to **protect Australia from incoming pests/diseases (24%)**. A further one in four **(23%) thought AQIS's leading role and function is to monitor the quality of exports**.

Notable proportions also made specific reference to a role in facilitating and administering exports, ensuring compliance and being responsible for regulations. A significantly smaller proportion made reference to a role in imports (i.e. facilitate/administer imports and monitor the quality of imports) as expected considering the clients surveyed in 2005 are Export program clients.

The only significant shift in perceptions concerning the primary role and function of AQIS occurring in the last year was an increase in the proportion of Export clients viewing the leading role to be the facilitation and administration of exports (up by 5%, to 15% in 2005). Overall, export client's perceptions concerning the primary role and function of AQIS have **not shifted significantly in the last year**.

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?"

Of the export program clients involved in exports (94%) just over eight in ten (78%/94% = 83%) **felt that the AQIS label does add high or at least some value when it comes to accessing overseas markets.** In fact, almost two thirds (62%/94% = 66%) actually felt that the AQIS label adds **high** value – a very positive result. Conversely, only 12% (11%/94%) 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 among Export program clients has not changed significantly since 2002.

Value of AQIS label	% (n = 661)
High value	62
Some value only	16
Low value	4
No value at all	7
Don't know/Depends	5
Not involved in exports	6
TOTAL	100

8 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 = 661)
1 (Very poor value for money)	4
2-5	30
6-9	58
10 (Very good value for money)	9
TOTAL	100

Two thirds of Export client respondents (67%) gave AQIS service a ‘value for money’ rating of 6 or higher out of 10. Client perceptions concerning value for money have not changed significantly since 2002.

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

- 6.3 in 2002;
- 6.4 in 2003;
- 6.4 in 2004; and
- 6.4 in 2005.

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. This could be achieved by, for example, emphasising what AQIS provides for the fees it charges.

Changes to AQIS charges over the last 12 months

Changes to AQIS charges over the last 12 months	% (n = 661)
Increased	24
Stayed the same	37
Decreased	6
Don't know	32
Both increased and decreased	1
TOTAL	100

When asked if AQIS charges had changed over the last 12 months, one in four (**24%**) reported that charges had increased. Only about 1 in 17 (6%) reported decreased charges and a large proportion (37%), said that charges had stayed the same. (It is noted that approximately one in three (32%) export client respondents reported not knowing whether AQIS charges had changed over the last 12 months.)

These findings are similar to those in 2004 as follows:

- 4% fewer clients in 2005 reported *increased* charges (24% vs. 28% in 2004); and
- 2% fewer clients in 2005 reported *decreased* charges (6% vs. 8% in 2004).

Lastly, a significant proportion of export clients (approximately a third - 32% in 2005) were again unsure about changes to AQIS charges over the last 12 months (26% in 2003 and 2004). This again flags the issue that **AQIS possibly needs to communicate more with clients about changes (if any) to charge rates.**

Charges have (reportedly) increased for a significant proportion of clients in the last year. However, **perceptions concerning value for money** and other indicators concerning perceptions of cost **have remained steady or improved** in AQIS's favour since 2002. [For instance, importance and satisfaction ratings of 'value for money' and the proportion who agree that the tasks AQIS performs are value for money have remained steady or improved.] Therefore, while prices have increased for one in four (and decreased for only one in seventeen) average perceptions concerning value for money have remained stable. **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.**

9 AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Respondents were asked whether or not they had seen the AQIS Service Charter. Over eight in ten (**83%**) **were unaware of the AQIS Service Charter.**

Only one in seven (14%) said that they had seen the Charter. Awareness levels of the Charter have decreased since 2004 (when 25% reported awareness). **AQIS clearly needs to more consistently communicate with clients from all service areas about the AQIS Service Charter.**

Aware of AQIS Service Charter	% (n = 661)
Yes	14
No	83
Don't know	3
TOTAL	100

Awareness of Service Standards in the Charter

Of those (94) AQIS clients that were aware of the Charter, just under three in five (57%) were aware of the standards. Awareness of service standards in the charter has decreased slightly by 5% since 2004, from 62%.

Aware of Service Standards	% (n = 94)
Yes	57
No	36
Don't know	6
TOTAL	100

In summary, only a small minority have seen (are aware of) the Service Charter. Of those aware of the Charter, just over half are aware of the Standards entailed within the charter.

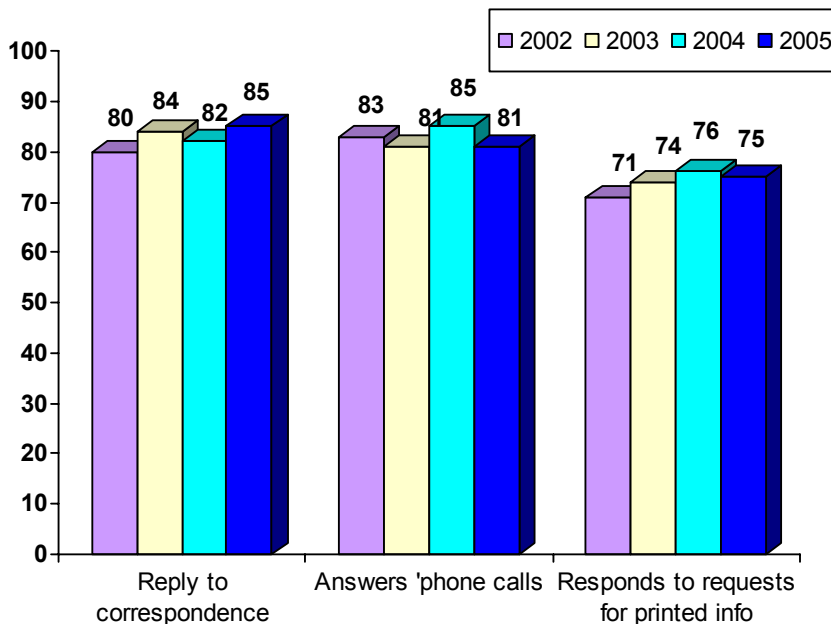
How often Service Standards are met

All Export 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 2005, three quarters or more AQIS Export clients said that AQIS ‘always’ or ‘often’ met each of the three service standards over the past 12 months.** In fact, once the segment of ‘don’t knows’ is deleted for each of the standards, more than **4 in 5 clients report that AQIS ‘always’ or ‘often’ met all three service standards over the past year.**

This is a **very positive result**, and continues the high benchmark set in 2002. As shown in the table below, AQIS’s performance on the standard regarding ‘replies to your correspondence...’ increased slightly while performance on the standards re ‘answers your telephone calls...’ and ‘responds to your requests for printed...’ decreased slightly since 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 = 661)	% “Answers your telephone calls or messages promptly during normal office hours” (N = 661)	% “Responds to your requests for printed information within 5 working days of receipt” (N = 661)
Always	71	60	54
Often	14	21	21
Always + Often	85	81	75
Sometimes	7	14	10
Rarely	2	3	2
Never	1	1	2
Don’t know	5	1	12
Total	100	100	100

% of Clients who say AQIS meets each standard ‘Always’ or ‘Often’ – 2002-2005



10 AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin?	% (n = 661)
Yes	41
No	56
Don't know	3
TOTAL	100

Approximately two in five (41%) Export clients reported that *they do* receive the AQIS Bulletin while just over half (56%) say they *do not* receive the AQIS Bulletin. Receivership of the AQIS bulletin among respondents has decreased significantly in the last year by 8% from 49% in 2004.

Export program clients who reported receiving the AQIS Bulletin were asked (for the first time in 2005) "*how often do you read the AQIS Bulletin?*" and "*how much of the AQIS Bulletin do you usually read?*"

The majority (two thirds) of Export clients who receive the Bulletin report that they read it every month - **a positive result**. In fact, the large majority (83%) read it every few months or more often.

How often do you read the AQIS Bulletin?	% (n = 268)
Every month	66
Every few months	17
Twice a year	6
Once a year	2
Only if I know there's something new there	5
Don't know	5
TOTAL	100

The majority (two thirds) of Export clients who receive the Bulletin report that they read about half or more of the AQIS Bulletin. In fact, **almost two in five respondents report reading the entire AQIS Bulletin**.

How much of the AQIS Bulletin do you usually read?	% (n = 268)
All of it	37
About three quarters of it	10
About half	19
About a quarter of it	16
Less than a quarter of it	10
Don know	8
TOTAL	100

Export program clients who reported receiving the AQIS bulletin were also asked (for the first time in 2005) *“overall, how useful is the AQIS Bulletin to you and to people in your industry?”*

Three quarters (75%) of Export clients rated the usefulness of the AQIS Bulletin as ‘somewhat’ or ‘very’ useful – a positive result. In fact, one in four (26%) export clients rated the AQIS Bulletin as very useful. Conversely, approximately one in four (23%) rated the Bulletin ‘of little use’ or ‘not at all useful’ (only 1 from 33 rated the Bulletin as ‘not at all useful’).

Overall, how useful is the AQIS Bulletin to you and to people in your industry?	% (n = 268)
Very useful	26
Somewhat useful	49
Of little use	20
Not at all useful	3
Don’t know	2
TOTAL	100

AQIS Website

Just over three in five Export clients (63%) reported visiting the AQIS website (www.aqis.gov.au) in 2005. This figure has increased (by 6%) since 2004, when 57% of Export client respondents reported visiting the website.

Have you visited the AQIS website	% (n = 661)
Yes	63
No	37
TOTAL	100

Export program clients who reported visiting the AQIS website were asked (for the first time in 2005) “*how often do you visit the website (www.aqis.gov.au)?*” and “*which areas of the website do you usually visit?*”

Of the Export clients who reported visiting the AQIS website in 2005, the majority (61%) visit the website monthly or more frequently. One in five (20%) visit the site weekly or more frequently while a third (33%) go to the website only once or twice a year or less frequently.

How often do you visit the AQIS website?	% (n = 419)
Daily	3
Weekly	17
Monthly	41
Once or twice a year	31
Once every few years	2
Only if I know there’s something new there	5
Don’t know	1
TOTAL	100

The areas of the AQIS website visited by those Export clients reporting to have visited the website are shown in the table below. The main website areas visited by Export clients concern export facilitation and are spread over a number of program domains.

Which areas of the website do you usually visit?	% (n = 419)
Export facilitation	14
Exporting live animals and reproductive material	10
Import requirements	8
Exporting fish and fish products	7
Phyto	7
Exporting plants/ grains and horticulture	6
Useful links: Export	5
Dairy Exports	5
Elmer 2	5
Icon	5
Exporting food	3
EXDOC	3
Exporting organic and bio-dynamic products	2
Fees and charges: Export	1
Export Awards	1
Other	27
Don't know	8
TOTAL	117

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.

Export program clients who reported having visited the AQIS website were also asked (for the first time in 2005) *“overall, how useful is the AQIS website to you and to people in your industry?”*

More than four from five (84%) Export clients rated the usefulness of the AQIS website as ‘somewhat’ or ‘very’ useful – a very positive result. In fact, two in five (43%) Export clients rated the website as very useful. Only about one in seven (14%) rated the website ‘of little use’ or ‘not at all useful’ (only 1 from 100 rated the website as ‘not at all useful’).

Overall, how useful is the AQIS Website to you and to people in your industry?	% (n = 419)
Very useful	43
Somewhat useful	41
Of little use	13
Not at all useful	1
Don't know	2
TOTAL	100

11 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 2005. In 2005, 42% of all AQIS Export clients were aware of Peak Industry Organisations compared to 37% in 2004.

Awareness of Peak Industry Organisations	% (n = 661)
Yes	42
No	55
Can't say	3
TOTAL	100

Membership of Peak Industry Organisations

Of those AQIS Export clients (279 people) who are aware of Peak Industry Organisations representing their interests, the majority (75%) are currently members of this peak body. These figures have not changed significantly since the last survey period (2004).

Currently a member of peak industry body	% (n = 279)
Yes	77
No	23
TOTAL	100

12 CLIENT COMMENTS

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

Of these comments, approximately two in five (38%) were positive - the comment made by the largest proportion of Export clients was positive and noted happiness with the service provided by AQIS and belief that AQIS is doing a good job.

The following comments noting suggestions for and areas requiring improvement were provided by approximately one in ten export clients:

- Need more staff/regional staff (12%);
- Unprofessional/received bad customer service (12%);
- Not enough flexibility/negative attitude/over-regulated (10%);
- Poor training of staff/need improvement of training and specialist staff for our industry (10%);
- Need to improve communication/not informed of changes (8%) and;
- Work with us/work with industry/ need closer consultation with industry (8%).

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

These core concerns are also mainly those which are encapsulated within the two most important AQIS service factors (i.e. Professionalism and Consultation).

The detailed client comments are outlined in the table below and overleaf.

Other comments	% (n = 154)
<i>Positive - Happy/doing a good job</i>	27
<i>Positive - Helpful/responsive/easy to deal with</i>	14
<i>More staff/regional staff</i>	12
<i>Unprofessional/bad customer service</i>	12
<i>Positive - Performs a necessary function/Valuable service</i>	11
<i>Not enough flexibility/negative attitude/over-regulated</i>	10

Other comments	% (n = 154)
Poor training of staff/need improvement of training/specialist staff	10
<i>Positive - Good service/Excellent customer service</i>	8
Need to improve communication/not informed of changes	8
Work with us/work with industry/closer industry consultation	8
Fees too high/need flexible fee structure	7
<i>Positive - Professional</i>	7
More accessible staff/accessible when requested/instead of answering machine	7
More flexible hours/contactable outside business hours	6
Room to improve/Still need to improve in some areas	5
Faster turn around time/delays/Takes too long for items to get through	3
More/better/less confusing guidelines	3
Need more awareness of the market place	3
Need to work in partnership/Act more like police	3
Don't understand business/my business	2
Improve electronic communication/improve computer systems	2
EXDOC unnecessary/expensive/operating problems	2
Too political/Government revenue raiser/no real function	2
Improved services/getting better	2
Better billing services/invoicing/accounting	1
Provide more guidelines/detail	1
Problems with documentation processes/lost paperwork etc	1
<i>Positive - Other positive responses</i>	1
Dissatisfied/unhappy (no further information)	1
Total	179

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

13 CONCLUSIONS

Across all Export program clients, **overall satisfaction with AQIS services is high.** With an overall client satisfaction score of 7.6, the high levels of satisfaction recorded each year since 2002 (7.4 to 7.7) 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 7.6 shows that AQIS is generally meeting the needs of Export 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'

- ❖ As in prior years (2002, 2003 and 2004), 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 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** (more than three in four felt that staff listen, respond promptly to requests for assistance, are contactable when needed, make their expectations clear, and are open about operations), **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, however we know that improvements in this area can lead to increased overall satisfaction;
- ❖ The large majority of export clients believe AQIS staff adequately explains clients' QA/CA/Co-regulation options;
- ❖ The large majority of Export clients 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, answering telephone calls/messages, and responding to requests for printed information) with approximately four in five respondents who could respond regarding delivery of the service standards said that AQIS 'always' or 'often' delivered in each case in 2005;
- ❖ Prices have increased for a significant proportion of export clients in 2005 while average perceptions concerning value for money have remained stable; and
- ❖ **Overall, there has been little movement across the majority of AQIS service attributes and AQIS value areas examined.**

Service areas that need to be addressed

While client attitudes concerning whether AQIS effectively meets (or indeed *understands*) the needs of business and AQIS flexibility are both performing moderately well it is recommended that AQIS continue addressing these domains. Further improvement is believed to lead not only to increases in satisfaction with these specific attributes but to increased overall satisfaction and to a deeper and more genuine level of organisational respect for AQIS and the way it operates.

Action in the following two areas is recommended (as per the prior two years):

- **Further increase the level of industry consultation** – further improve understanding of the practical and day-to-day impacts of AQIS regulations and operations on clients' business and where possible take into account the needs of business when applying AQIS rules and regulations; and
- **Increasingly adopt a 'partnership'/team approach in relationships with clients**, for example
 - Continue to make a greater contribution to the success of their business,
 - Continue to help businesses to find solutions to export-related problems,
 - Be aware of the sizeable and continued call to shift away from the perceived watchdog/regulatory position to a greater focus on assistance and service culture, and
 - Take the needs of business into account to an even greater degree, ... to maximise both businesses' compliance with AQIS regulations and client satisfaction.

Finally, **clients also continue to be concerned about perceived inconsistencies in rule interpretation across staff**. To address this, AQIS needs to:

- Further increase consistency between AQIS inspection officers; and
- Further increase consistency between State offices.