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Australian Quarantine and Inspection Service

**Broker Clients
2006 Satisfaction Survey
Research Report**

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BROKER CLIENTS - SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 259 clients of AQIS Broker Services were contacted by telephone to participate in the Customer Satisfaction Survey in 2006. Of these, **219 clients** actually participated in the survey, giving an overall **response rate of 85%** - showing that there was an excellent response to the survey among Brokers.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

Most respondents who participated in the survey were long-time clients of AQIS. Three quarters (75%) had dealt with AQIS for 10 years or more. The proportion of long term clients in 2006 is significantly greater than that recorded in 2004 when 62% had dealt with AQIS for 10 years or more.

It is important to consider this shift in the sample when interpreting changes in results between 2004 and 2006. It is possible that changes can be attributed either (i) to the longer period of contact with AQIS among the 2006 sample, or (ii) to actual changes in AQIS service levels between the two surveys. Footnotes will be provided where relevant to indicate change or otherwise attributable to the variation in samples as opposed to the change in service levels from AQIS between the two surveys.

Length of time	% 2004 (N = 302)	% 2006 (N = 219)
Less than 12 months	3	3
1 and less than 3 years	12	7
3 and less than 5 years	8	3
5-9 years	15	12
10 years or more	62	75
TOTAL	100	100

Frequency of contact with AQIS

Most Brokers have very frequent contact with AQIS. Almost nine in ten (88%) contact AQIS on a daily basis. Frequency of contact with AQIS in 2006 was significantly higher than for the 2004 survey sample when only 69% reported daily contact.

In 2006, Broker clients who had a 10 year or longer relationship with AQIS were significantly more likely to have daily contact with AQIS than those same Broker clients in 2004 (92% daily contact in 2006 vs. 77% daily contact in 2004).

Contact with AQIS	% (N = 219)
Daily	88
Weekly	11
Fortnightly to Monthly	1
Every couple of months	1
TOTAL	100

Note: The percentages in the above table add to more than 100 due to rounding.

Regular AQIS contact office

Regular contact office	% (N = 219)
NSW- Sydney	46
Victoria – Melbourne	45
Queensland – Brisbane	30
WA – Perth	12
SA – Adelaide	10
WA - not Perth	5
Canberra	4
Victoria - not Melbourne	2
NSW - not Sydney	1
Tas – Hobart	1

Regular contact office	% (N = 219)
Queensland - Far North/Cairns/Townsville	1
NT – Darwin	1
SA – not Adelaide	1
Tas – not Hobart	1

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

The table above shows the main AQIS offices with whom Brokers liaise. As expected, the main capital cities dominate as the primary contact offices. Approximately one in two Broker clients in 2006 reported having regular dealings with Sydney and Melbourne offices and three in ten with the Brisbane office. Since 2004, contact with the Melbourne and Brisbane office has increased significantly by 14% and 9% respectively.

Consistency in satisfaction across AQIS offices

Approximately one in four Brokers (59 clients) reported that they usually deal with more than one AQIS office. Of these, about half (48%) said that their level of satisfaction *is consistent* across all the offices they deal with. The other half (or 30 people) said that their satisfaction varied between different offices. Of these, most were dissatisfied with the Sydney, Melbourne and Brisbane offices – as expected considering these offices were the three most often dealt with.

Brokers attributed this dissatisfaction mainly to

- ❖ Unprofessional staff/service;
- ❖ Not enough staff/staff not available when needed; and
- ❖ Lack of knowledge/specific knowledge.

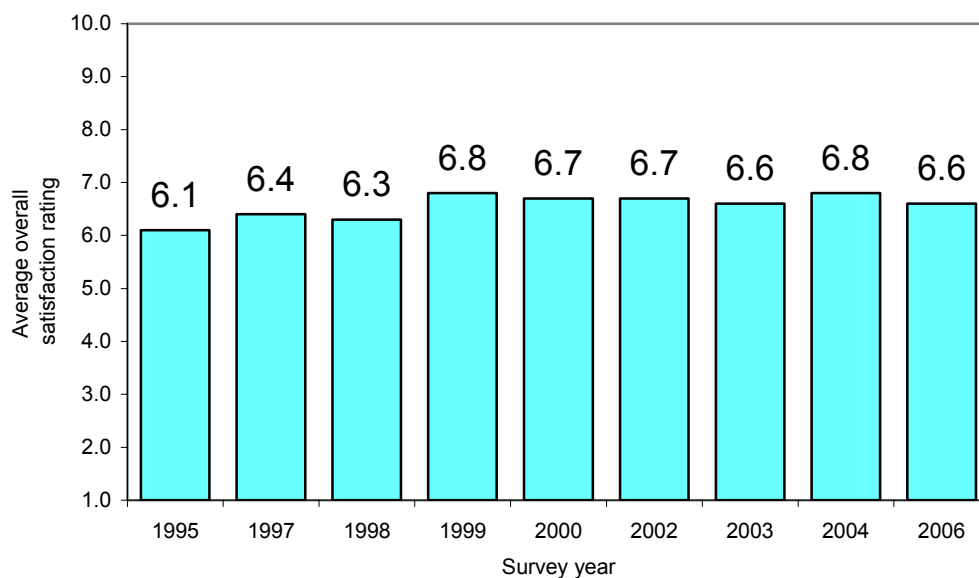
OVERALL SATISFACTION

Respondents were asked to rate their overall satisfaction with the service provided by AQIS on a scale of 1 to 10 – with 1 being 'extremely dissatisfied', and 10 being 'extremely satisfied'. **The majority of Brokers were satisfied with the service provided to them by AQIS, with 78% giving it a rating of 6 or more out of 10.**

Level of overall satisfaction with AQIS service (on a scale of 1-10)	% (N = 219)
1 (Extremely Dissatisfied)	1
2-5	21
6-9	73
10 (Extremely Satisfied)	5
TOTAL	100

Respondents' overall satisfaction with AQIS service was **relatively high in 2006, with an average satisfaction rating of 6.6 out of 10.0**. The average overall satisfaction rating was 6.8 in 2004. Broker's overall satisfaction with AQIS service has therefore remained relatively consistent, decreasing only slightly since the last survey.

Average rating of Overall Satisfaction with AQIS service 1995-2006



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.

Just over a third (36%) of respondents reported that their overall satisfaction had improved over the last two years. The largest proportion of respondents (39%) said that they were as satisfied now as they were two years ago but a significant proportion (24%) reported that their overall satisfaction had deteriorated over this period.

The table below provides figures for the 2004 and 2006 surveys and indicates **a decrease in overall satisfaction** levels over the last two years, **though this is not statistically significant.**

Change in overall satisfaction over the last two years	% 2004 (N = 302)	% 2006 (N = 219)
Improved	46	36
Stayed the same	35	39
Deteriorated	18	24
Don't know	1	1
TOTAL	100	100

Main factors contributing to *improvement* in overall satisfaction

Of those whose overall satisfaction had improved (79 respondents), **almost four in ten (37%) attributed this improvement to improved efficiency.** The proportion of respondents noting this factor as contributing to improvement in their overall satisfaction increased significantly since the last survey by 24%.

Also reported by over one in ten respondents:

- ❖ Staff are better trained; and
- ❖ Better team approach/have been more flexible.

Factors contributing to <i>improvement</i>	% (N = 79)
Improved efficiency	37
Staff are better trained	13
Team approach/more flexible	13
More approachable/better communication	8
Understand business/business needs	8
More contact/personal service	6
More helpful	4
More professional	3
Don't know	5
Other	3
Total	100

Main factors contributing to *deterioration* in overall satisfaction

About one in four respondents (52 clients) reported that their overall satisfaction had deteriorated over the last two years. The most common reason cited by these respondents was the **lack of available staff, followed by the lack of specific knowledge of staff, unprofessional staff and inconsistent rule interpretation** (exact percentages are not reported here due to the small sample size). The first three reported factors contributing to deterioration in overall satisfaction were also reported in 2004.

Changes that AQIS could make to improve levels of service

Respondents were asked (an open-ended question) about improvements that could be made to AQIS services. The variety and relative popularity of different answers are shown below.

Suggested changes to improve service	% (N = 219)
More staff available to clients	27
Better trained/more knowledgeable staff/specialist knowledge	23
More accessible/contactable	23
More efficient/faster processing	22
Consistent rule interpretation	15
More flexible/understanding	10
Closer consultation with industry	10
Improve understanding of business/my business	5
Reduce fees/improve value for money	4
Better access to information/updates	4
More information/updates	4
More automated quarantine entry processing	4
Adopt a team approach/work with us	3
None/no improvements/no changes necessary	8
Don't Know	5
Other	1

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

The table shows that more than one in five respondents suggested the following changes:

- ❖ **Having more staff available to clients;**
- ❖ **Having better trained staff with specialist knowledge;**
- ❖ **Being more accessible/contactable; and**
- ❖ **Being more efficient/having faster processing.**

In addition, over one in ten also suggested:

- More consistent rule interpretation;
- More flexible and understanding; and
- Closer consultation with industry.

The top six suggestions for improvement were also the top six suggestions put forward in 2004. The top four suggestions were suggested by a significantly larger proportion in 2006 compared with 2004 indicating these areas are considered increasingly important. **AQIS needs to make progress in these areas in order to improve Brokers' satisfaction with AQIS service beyond current levels.**

Approximately one in thirteen (8%) Broker clients said no improvements were necessary in 2006.

SATISFACTION VS. IMPORTANCE OF SPECIFIC AQIS SERVICE ATTRIBUTES

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

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

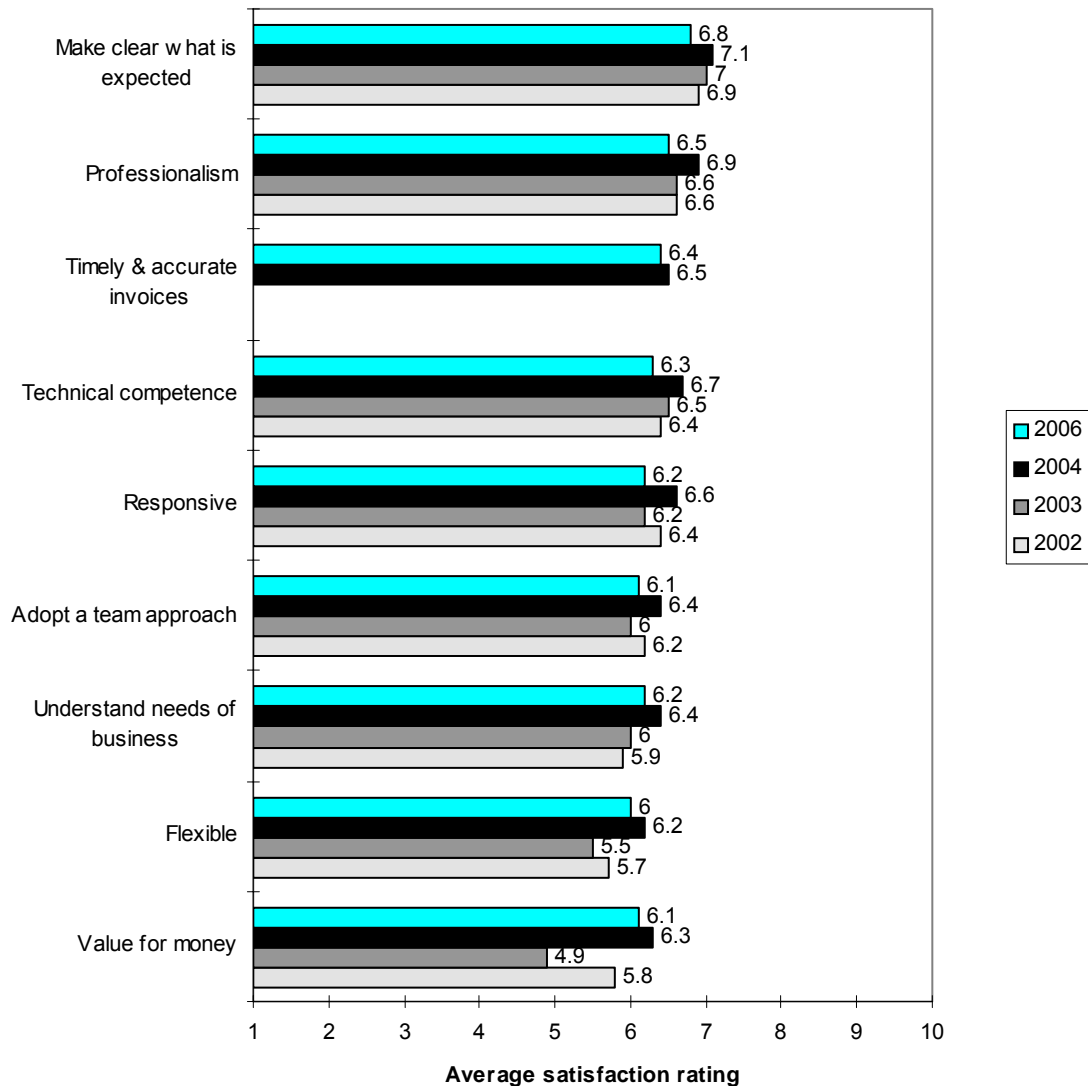
According to respondents, the most important attributes of AQIS service are **AQIS expectations being clear and staff professionalism**. These two attributes both achieved average importance ratings of 8.7 out of 10. Respondents not only thought that these attributes were most important but were also most satisfied with these aspects of service. Average satisfaction ratings were 6.7 for expectations being clear and 6.5 for staff professionalism. **The alignment between the top rating importance attributes and corresponding top rating satisfaction scores demonstrates that AQIS is generally aware of the relative needs of this client group.**

It is noted that all attributes of AQIS service are considered relatively important with six of nine attributes having achieved averages above 8 out of 10. **AQIS performed satisfactorily on all attributes, with average satisfaction ratings ranging from 6.1 to 6.8 (i.e., within positive satisfaction range). Broker client's satisfaction with AQIS services is generally moderate in 2006.**

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Weighted Satisfaction Gap (i.e. 10 – Satisfaction X Importance)
Expectations are clear	6.8	8.7	28
Staff professionalism	6.5	8.7	30
Timely & accurate invoices	6.4	8.2	30
Staff technical competence	6.3	8.6	32
Responsive to needs	6.2	8.3	32
Understand needs of business	6.2	8.1	31
Adopting team approach	6.1	7.7	30
Value for money	6.1	7.4	29
Flexible	6.0	7.9	32

The figure below shows historical data for average satisfaction ratings. **Overall, Broker clients of 2006 are significantly less satisfied than they were in 2004 with the core AQIS service attributes.** Average satisfaction ratings have decreased for all nine of the service attributes and decreased *significantly* for five of the attributes (perceived *importance* remained relatively consistent in comparison and decreased significantly across only two of the nine service attributes). As a result the gap between perceived importance and perceived performance has increased since 2004.

Average rating of satisfaction with attributes of AQIS service 2002 – 2006



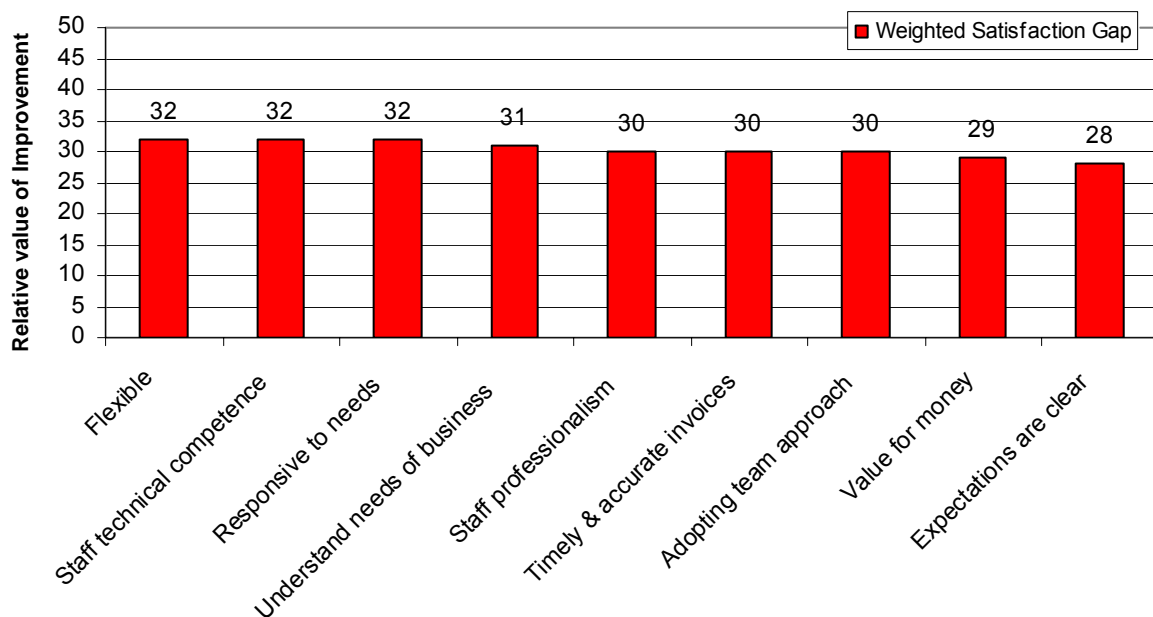
To identify the AQIS service attributes with the most fertile room for improvement (i.e. where improvement would be most valued by clients), a client centred analysis approach was utilised taking into account both client perceived performance (i.e., satisfaction) and client perceived importance.

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 client¹.

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. **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 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 very small (only 4 points in fact) and all weighted satisfaction gap scores are in excess of 25 indicating areas that if improved would increase overall satisfaction. **Identifying priorities for improvement** from the table and figures above, and incorporating the significant suggestions for improvement provided by Broker clients **we recommend focusing on staff professionalism, staff technical competence and responsiveness to needs in order to improve client satisfaction.**

In general, as service was better in areas that were seen as more important by clients, the AQIS Broker client service area does understand client needs, knows what is important to this client group and generally provides it to them. What we recommend, however, is improved performance across the core areas specified above to decrease the divergence between perceived importance of an attribute and perceived performance.

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

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,
- 5 = Strongly disagree.

Professionalism of staff

Staff professionalism was rated average to highly by Broker clients in 2006.

Seven from ten survey respondents rated staff professionalism positively and three quarters of respondents agreed that AQIS staff adequately explained QA/CA/Co-regulation options. While over a quarter of respondents disagreed with the following statements **more than half of the Broker client respondents agreed that:**

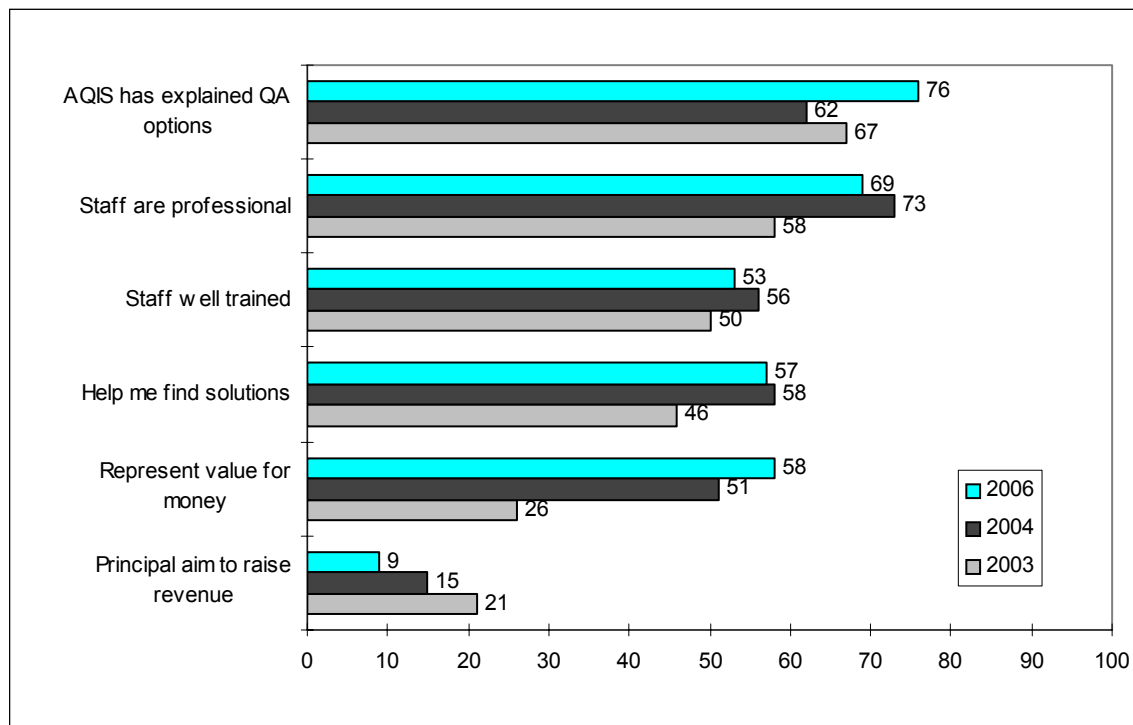
- the tasks AQIS performs are value for money;
- AQIS helps them find solutions; and
- AQIS staff are well trained.

Finally, the vast majority (83%) did not agree that AQIS's aim was to raise revenue and fewer than one in ten agreed (9%).

As can be seen in the figure below the largest shifts in the perception have been positive in nature with a 14% increase in agreement that AQIS staff adequately explained QA/CA/Co-regulation options and a 13% increase in disagreement that the aim of AQIS is to raise revenue.

Professionalism statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff are professional	69	20	11
Adequately explained QA/CA/Co-reg optns	76	12	12
Helps me find solutions	57	17	26
Staff well trained	53	18	29
Tasks AQIS performs are value for money	58	13	29
Aim of AQIS is to raise revenue	9	8	83

Ratings of Staff Professionalism 2003 - 2006



Integrity of staff

The ratings of staff integrity, specifically concerning the consistency with which AQIS staff interpret rules and regulations is an **area that AQIS should strategically focus on improving**.

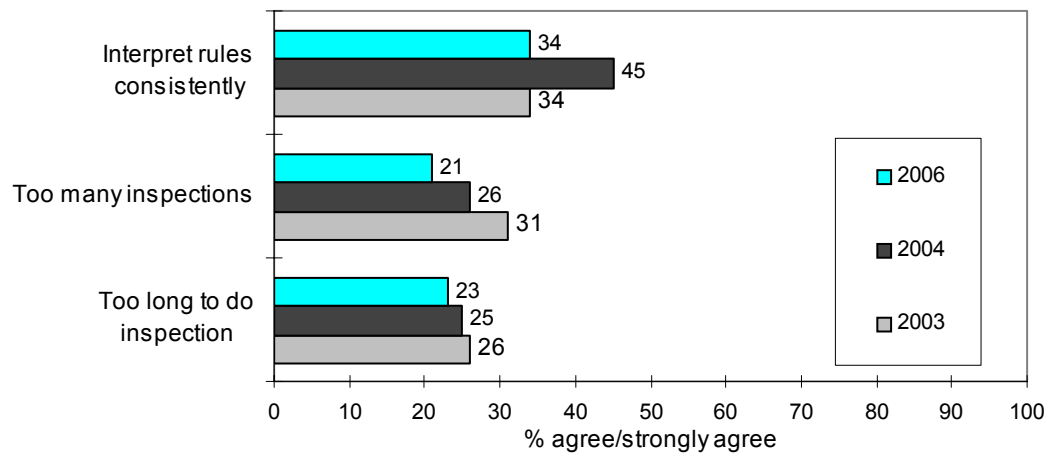
Integrity of staff (and the AQIS brand) is an extremely important factor of AQIS value which has far-reaching influence on the other factors and on the overall perception clients hold of AQIS. Just over three in ten (34%) Broker clients agreed that **staff interpret rules and regulations consistently** while just less than **six in ten (57%) actually disagreed**. As shown in the figure below, agreement has significantly decreased by 11% since the last survey.

Improving integrity will simultaneously improve the bigger picture (i.e. increase overall satisfaction) and increase satisfaction with the core service attributes in most need of addressing, including perceived staff professionalism and staff technical competence. The issue of consistent rule interpretation and related staff knowledge was also flagged earlier in changes AQIS could make to improve service.

In terms of inspections, approximately one in five agreed that AQIS conducts too many inspections and that inspections take too long. However, almost six in ten Broker clients disagreed. Slight improvements concerning inspection ratings are shown in the figure below.

Integrity statements	% Agree/ Strongly Agree	% Neither / Don't know	% Disagree/ Strongly Disagree
Staff interpret rules & regulations consistently	34	9	57
Too many inspections	21	22	57
Staff take too long to do inspection	23	21	56

Ratings of Staff Integrity 2003 - 2006



Openness of staff and of the organisation

Overall perceptions of 'AQIS openness' were mixed in 2006. While AQIS staff are being perceived as relatively open, listening to clients, and having clear expectations they are not being perceived as easily contactable, consulting enough with industry nor as responding promptly to requests for assistance.

Ratings are moderate, with three attributes displaying considerable room for further improvement while ratings have also decreased (bordering statistical significance) across two attributes since the last survey.

Two thirds of clients agreed that:

- ◇ AQIS's expectations are clear (68%);
- ◇ AQIS staff listen to them (70%);
- ◇ AQIS is open about how they operate (68%); and
- ◇ Hours of operation reflect needs (63%, but a notable 28% disagreed).

In contrast, half or fewer respondents agreed:

- They can contact AQIS when needed (46% actually disagreed);
- AQIS consults enough with industry (28% actually disagreed); and
- AQIS respond promptly to requests for assistance (35% actually disagreed).

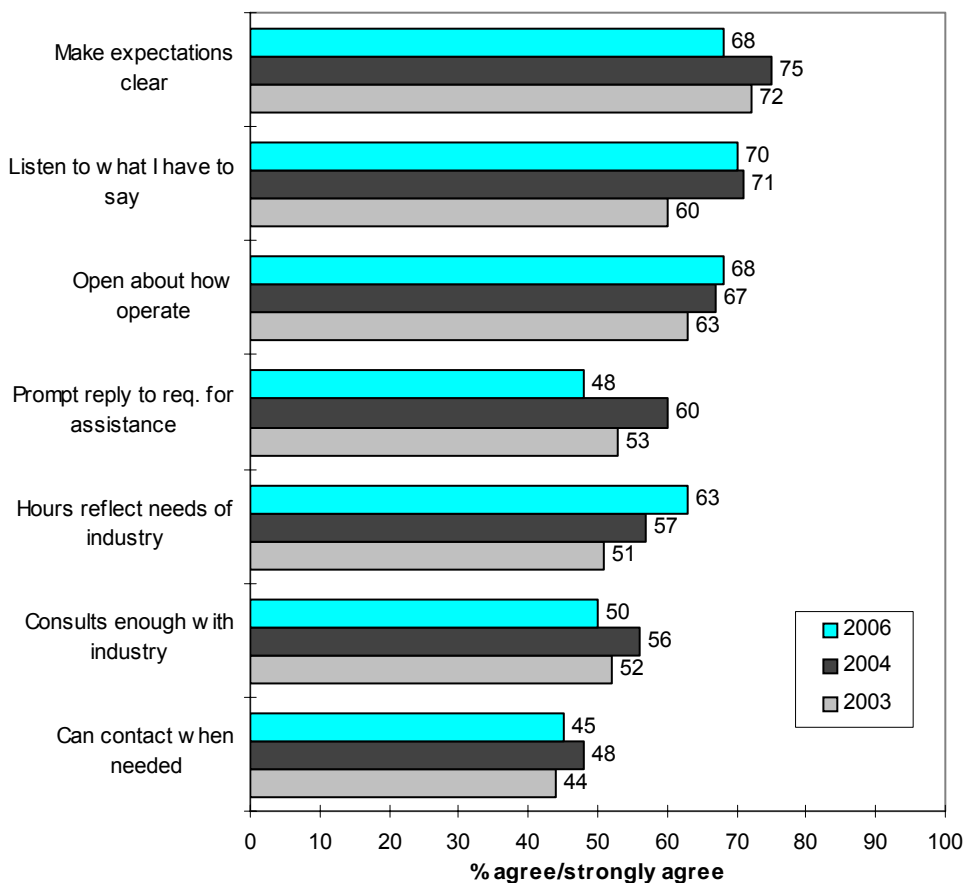
In comparison to the last survey, agreement decreased (bordering statistical significance) with regard to:

- Responds promptly to requests for assistance (down 12% since 2004); and
- AQIS's expectations are clear (down 7% since 2004).

Openness statements	%	%	%
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	Agree/ Strongly Agree	Neither/ Don't know	Disagree/ Strongly Disagree
Expectations are clear	68	11	21
Listens	70	13	17
Open about how they operate	68	14	19
Respond promptly to requests for assistance	48	17	35
Hours of operation reflect needs	63	9	28
Consults enough with industry	50	22	28
Can contact AQIS when needed	45	9	46

Ratings of Staff Openness 2003 – 2006



Fairness of staff

Respondents' ratings of staff fairness were moderate and in the main remained consistent with ratings of the last survey. The largest shift

since 2004 has been negative and significant with **fewer clients agreeing that AQIS staff promptly respond to requests for information.**

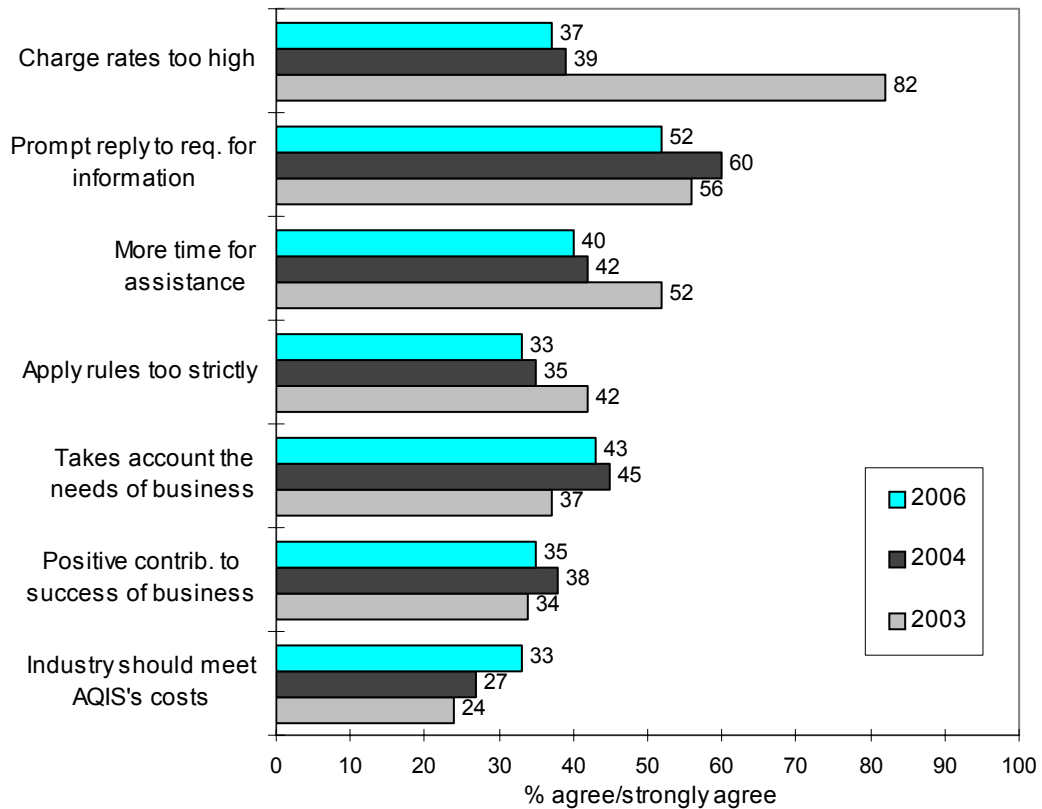
In summary, a significant proportion of clients *disagreed* with *positive* statements, and agreed with negative statements about the fairness of staff.

As reported in 2004, The Research Forum is of the opinion that the issue of charges and value for money is no longer a significant problem. The proportion of respondent disagreeing charge rates are too high is larger than the proportion agreeing (42% vs. 37% respectively) and the proportion that agree Industry should meet all of AQIS's costs has increased by 6% since 2004.

Also as reported in 2004, The Research Forum believes the perceived relationship AQIS has with industry in terms of the **impact that AQIS has on Brokers' business and the perceived assistance vs. regulatory position needs to be focused upon to achieve improvement in perceived fairness.**

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information (positive)	52	15	33
Take needs of business into account (positive)	43	20	37
Should devote more time to assistance/less to policing/regulating (negative)	40	23	37
Charge rates too high (negative)	37	21	42
Makes positive contribution to business success (positive)	35	26	39
Staff apply rules & regulations too strictly (negative)	33	19	48
Industry should meet all of AQIS's costs (positive)	33	18	49

Ratings of Staff Fairness 2003 – 2006



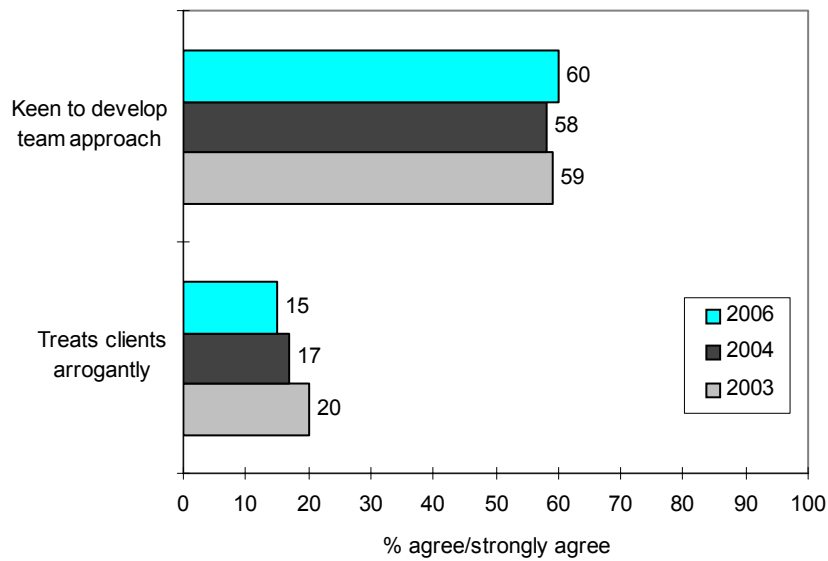
Respect

In terms of staff respect, respondents were generally positive. Levels remained consistent with the levels reported in 2003 and 2004.

The majority (60%) agreed that AQIS is keen to develop a team approach with the industry. The proportion of Brokers who believe that AQIS staff treat their clients arrogantly has decreased slightly since 2003 from one in five to one in seven in 2006.

Respect statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Keen to develop team approach	60	21	19
Treats clients arrogantly	15	15	70

Ratings of Staff Respect in 2003 - 2006



BROAD AQIS ISSUES

Primary role and function of AQIS

Respondents were asked what they perceived the primary role and function of AQIS to be. The vast majority of respondents (84%) felt that AQIS's main role is to protect Australia from incoming pests and/or diseases. This viewpoint has increased by 6% since 2006.

Primary role & function of AQIS	% (N = 219)
Protect Australia from incoming pests/diseases	84
Monitor quality of imports	6
Other (mixed)	3
Facilitate/administer imports	2
Ensure compliance	3
Responsible for regulations	1
Represent Australia's interests overseas	1
TOTAL	100

Value of AQIS Label

Value of AQIS label	% (N = 219)
High value	20
Some value only	14
Low value	6
No value at all	3
Don't know/Depends	5
Not involved in exports	53
TOTAL	100

Note: Due to rounding, the table total does not add to 100%.

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

Just under half (47%) the clients were involved in exports, and of these **72% (or 74 people) felt that the AQIS label *does* add high or at least some value when it comes to accessing overseas markets.** These levels are consistent with those reported in 2004.

FEES/CHARGES AND VALUE FOR MONEY

Rating value for money of AQIS services

Rating of value for money (on a scale of 1 – 10)	% (N = 219)
1 (Very poor value for money)	2
2-5	35
6-9	57
10 (Very good value for money)	6
TOTAL	100

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

Just above three in five (63%) clients held a positive opinion of AQIS charges – i.e. rated 'value for money of AQIS services' as '6' or more out of 10. This figure is similar to that reported in the previous survey period, when 66% of respondents rated value for money in the positive range. In 2006 the average rating of value for money among Brokers was **6.2 out of 10**, a slight (but non-significant) decrease from 6.4 recorded in 2004.

Changes to AQIS charges over the last 12 months

Changes to AQIS charges over the last 12 months	% (N = 219)
Increased	42
Stayed the same	31
Decreased	13
Don't know	6
Both increased and decreased	8
TOTAL	100

When asked if AQIS charges have changed over the last 12 months, **most respondents (42%) reported an increase in charges**. Approximately a third reported that charges had stayed the same over the last 12 months while approximately one in eight (13%) reported charges had decreased.

Considering the fact that over four in ten Broker clients reported an increase in AQIS charges over the last twelve months relative to the approximate one in ten experiencing a decrease, the consistency in perceived value for money between 2004 and 2006 is very positive. In fact, ratings concerning most charge/cost/value for money related issues have remained stable or increased slightly since 2004 despite the increase in proportion of clients experiencing increased charges:

- Satisfaction with value for money (within AQIS service attributes) decreased slightly from 6.3 in 2004, to 6.1 out of 10 in 2006;
- Tasks AQIS performs are value for money (Staff Professionalism statement)
 - 51% agreed with this statement in 2004 compared to 58% in 2006;
- The principle aim of AQIS is to raise revenue (Staff Professionalism)
 - 15% agreed in 2004 compared to 9% in 2006;
- Charge rates too high (Staff Fairness statement)
 - 39% agreed in 2004 compared to 37% in 2006; and
- Industry should meet AQIS's costs (Staff Fairness statement)
 - 27% agreed in 2004 compared with 33% in 2006;

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Aware of AQIS Service Charter	% (N = 219)
Yes	32
No	65
Don't know	3
TOTAL	100

Respondents were asked whether or not they were aware that AQIS has a Service Charter. About a third (32%) of Broker clients were aware of the AQIS service charter. This proportion has decreased slightly (by 4%) since 2004.

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

Awareness of Service Standards in the Charter

Of those (71 Brokers) that were aware of the Charter, half (54%) *were aware* of the Standards therein. This figure has decreased though not significantly since 2004.

How often Service Standards are met

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

How often Service Standard met	"Replies to your correspondence within 20 working days of receipt with an answer to your query or at least letting you know when you can expect an answer" (N = 219)	"Answers your telephone calls or messages promptly during normal office hours" (N = 219)	"Responds to your requests for printed information within 5 working days of receipt" (N = 219)
Always	58	18	46
Often	22	25	23
Sometimes	11	30	11
Rarely	3	18	3
Never	2	9	2
Don't know	4	0	15
TOTAL	100	100	100
Always + Often			
2003	77	43	69
2004	78	51	77
2006	80	43	69

The likelihood of AQIS meeting each of the three service standards (either always or often) differed across the three standards.

AQIS **performance was high** with regards to "Replies to your correspondence within 20 working days of receipt." This standard was met always or often 80% of the time. Performance remained unchanged since the last survey

Just over two thirds (69%) of Broker clients reported AQIS always or often "responds to their requests for printed information within 5 working days of receipt". While performance has decreased since the last survey (by 8%), it is noted that the proportion of respondents saying that they 'don't know' whether AQIS 'responds to their requests...' was 8% and 15% in 2004 and 2006 respectively. 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 2004 and 2006 was actually 84% and 82% respectively. This represents high consistent achievement of the second service standard.

Last, in terms of AQIS staff always or often **“Answering Broker’s telephone calls or messages promptly during normal office hours” performance was low**. Further attention and improvement is required as:

- Only just above two in five (43%) Broker clients reported AQIS staff always or often answering their telephone calls or messages promptly during normal office hours - **one in four (27%) reported this occurred rarely or never**;
- This relatively low level of service provision to Brokers is consistent with concerns aired elsewhere in the report in the form of relatively moderate satisfaction levels concerning contact with and availability of AQIS staff and suggestions made by Brokers in 2006 for improvement (discussed earlier). For instance:
 - Statements concerning the perceived openness and fairness of AQIS staff:
 - 3 in 10 disagreed that hours of operation reflect needs; and
 - Less than 1 in 2 agreed they can contact AQIS when needed.
 - Less than 1 in 2 agreed that AQIS provides prompt reply to requests for assistance
 - Half agreed that AQIS provides prompt reply to requests for information
 - When all Brokers were asked for suggestions to improve AQIS service the four main suggestions for improvement reported by more than one in five Broker clients completing the survey were:
 - Having more staff available to clients;
 - Having better trained staff with specialist knowledge;
 - Being more efficient/faster processing; and
 - Being more accessible/contactable.

The Research Forum is of the opinion that further increases in overall satisfaction with AQIS will be achieved by improving the level of service re answering telephone calls and returning messages promptly during normal office hours.

INDUSTRY CONSULTATION

Awareness of Peak Industry Organisations that consult with AQIS

In 2006, just over 7 in 10 Brokers surveyed (72%) were aware of Peak Industry Organisations that consult with AQIS to represent their interests. Awareness of these Peak Industry Organisations has increased since 2004 - by 18%.

Awareness of Peak Industry Organisations	% (N = 219)
Yes	72
No	27
Can't say	1
TOTAL	100

Membership of Peak Industry Organisations

Of those Brokers who are aware of peak industry organisations representing their interests, the large majority (83%) are currently members of this peak body. Membership levels have remained comparable to those reported in 2003 and 2004.

Currently a member of peak industry body	% (N = 157)
Yes	83
No	17
TOTAL	100

AQIS PERMIT APPLICATION PROCESS

Of the majority (80%) who had been required to apply for an AQIS permit, three in four (73%) felt that the whole permit application process occurred within an acceptable timeframe or faster. However a significant minority (26%) felt that the process took too long.

Required to apply for an AQIS permit	% (N = 219)
Yes	80
No	20
TOTAL	100
Rate the permit application process	% (N = 175)
Acceptable time-frame	64
Took too long	26
Faster than expected	9
Don't know	1
TOTAL	100

All in all, **ratings of the permit application process remained consistent (declining only slightly) since the 2004 survey.** We note only a 2% decrease in the proportion reporting the process was faster than expected and a 6% increase in the proportion saying it took too long.

The table below shows that the vast majority (about four in five, 78%) of Broker clients who had been required to apply for an AQIS permit thought the permit conditions were clear and easy to understand.

Permit conditions clear & easy to understand	% (N = 175)
Yes	78
No	21
Don't know	1
TOTAL	100

AQIS PRODUCTS

Receipt of the AQIS Bulletin

The majority of Brokers (78%) completing the 2006 survey reported receiving the AQIS Bulletin. This is 12% higher than the proportion of Broker clients reporting receipt of the Bulletin in 2004.

While the proportion receiving the Bulletin was higher in 2006 than 2004, we know that length of time dealing with AQIS is also positively related to receipt of the AQIS bulletin. Those who had been dealing with AQIS for a longer period of time were more likely to receive the AQIS Bulletin.

Receive AQIS Bulletin	% (N = 219)
Yes	78
No	19
Don't know	1
TOTAL	100

Amongst those who do receive it, readership of the Bulletin is high: **77%** of those who do receive it **read every edition** and a further 11% read it every few months. Furthermore, most of those who receive it also read most of it: **73% read half or more of the Bulletin.**

Finally, **most of those who receive it (87%) judge it to be useful:**

- ❖ 36% say it is very useful; and
- ❖ 51% say somewhat useful.
- × 11% say it is of little use or nor use at all.

Website visitation

Website visitation continues to increase - from 88% in 2004 to 95% in 2006. That is, 19 in 20 Broker clients reported visiting the AQIS website.

Have you visited the AQIS website	% (N = 219)
Yes	95
No	5
TOTAL	100

Two thirds of those who have visited the website (67%) do so at least weekly:

- ❖ 31% visit daily
- ❖ 36% visit weekly;
- ❖ 22% visit monthly;
- ❖ 9% visit only once or twice a year; and
- ❖ 2% only visit if they know there's something new there.

The vast majority of those who visit the website (93%) also judge it to be useful:

- ❖ 65% say it is very useful; and
- ❖ 28% say somewhat useful.
- ✱ Only 7% feel the website is of little or no use at all.

Finally, those who visited the AQIS website were asked which areas they regularly visit. The answers are outlined below. Of notable proportion, more than half of the Broker clients report regular visits to the AQIS website area concerning the icon/database. Taking all reports into account website usage is varied and covers a number of issues/topics.

❖ Icon/database	55%
❖ Cargo	15%
❖ Treatment providers	11%
❖ Permits/permit application	10%
❖ Rules/regulations/restrictions	9%
❖ Food	8%
❖ Fumigation rules/requirements.....	6%
❖ Import conditions/schemes/information.....	5%
❖ Publications/notices/reports/updates	5%
❖ General Information/browsing	4%
❖ Forms/guidelines	4%
❖ Shipping vessels.....	3%
❖ Service providers/general	3%
❖ Plants/grains/horticulture	2%
❖ Quarantine information	2%
❖ Machinery	2%
❖ Other.....	6%
❖ Don't know	3%

Note: The percentages above add to more than 100% as respondents were allowed to specify more than one area of the website regularly visited.

SPECIAL INTEREST ISSUES

AQIS Approved Co-regulation/Quality Assurance/Compliance Agreement system

Brokers were asked if they have an AQIS approved Co-regulation (Co-reg), Quality Assurance (QA), or Compliance Agreement (CA) system in place. The vast majority of Broker respondents (93%) reported that they did have a QA/CA/Co-reg system in place. It is noted that this figure has increased significantly since 2004 when 70% reported having such a system in place.

AQIS Approved Co-regulation/Quality Assurance/Compliance Agreement system	% (N = 219)
Yes	93
No	7
TOTAL	100

Brokers with AQIS approved QA/CA/Co-reg systems were asked:

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

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

Co-regulation/Quality Assurance/ Compliance Agreement systems	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
AQIS was very helpful in the development of their QA/CA or co-regulation system	59	25	16
AQIS is very knowledgeable about QA/CA or Co-regulation systems	66	20	15

The table below shows that the large majority of Brokers (88%) with AQIS-approved QA/CA/Co-reg systems believe the QA/CA/Co-reg system is working well.

The Co-regulation/ Quality Assurance/ Compliance system is working well	% (N = 203)
Yes	88
No	12
TOTAL	100

Of those who had a QA/CA/Co-reg system in place, the generally positive impression of AQIS staff helpfulness and knowledge re the development of their system and the view by the large majority that the system is working well is consistent with satisfaction levels of 2003 and 2004.

Improvements to QA/CA/Co-reg systems

Brokers with AQIS approved QA/CA/Co-reg systems were asked what improvements they could suggest to the system. **Four in ten Brokers (41%) reported that they could not think of any improvements for the QA/CA/Co-reg system.**

The improvements suggested by clients (shown in the table below) were spread over a number of domains with no one domain in particular standing out. The three (3) main domains suggested for improvement concentrated around Brokers wanting AQIS to:

- i) work more closely with and understand industry;
- ii) provide more staff /better trained staff/more accessible hours;
and
- iii) provide greater consistency and uniform standards/simplify the system.

The fact that suggestions for improvement by Broker clients concerning their approved QA/CA/Co-regulation systems were generally made by small proportions in 2006 is testament to the general continued healthy condition of the system in place.

Improvements to QA/CA/Co-reg systems	% (N = 203)
None/no improvements/no changes necessary	41
Need to work more closely with industry and understand industry	11
System needs to be simplified	7
Needs more/better trained staff/more accessible	6
AQIS needs greater consistency and uniform standards	6
AQIS needs to place more trust in industry	5
Training process needs review	4
Needs more communication/provide more information	4
Faster process/Takes too long	3
Make system more practical / flexible	3
Improve electronic services	2
Don't know	12
Other	6

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

Track record

Broker clients were uncertain whether or not AQIS makes allowances for Brokers with good inspection records. Over half (56%) noted that they did not think AQIS makes allowances for those with a good track record while just over one in four (27%) believed they did. There is considerable room for AQIS customer service to inform its clients accurately in this respect.

OVERALL (TOP DOWN) SERVICE INTEREST ISSUES

Integration – Quarantine, Imported Food Inspection Program, & Customs

Brokers were asked whether they thought the whole service needs to be better integrated between Quarantine, Imported Food Inspection Program and Customs. Two thirds of respondents (73%) agreed that the system did need to be better integrated. This figure has increased slightly (by 5%) since 2004.

Electronic Organisation

Six in ten respondents agreed that the whole service is very well organised electronically. A significant proportion (more than a quarter – 28%) disagreed with this statement. Disagreement with this statement has increased by 8% since 2004.

CLIENT COMMENTS

Broker clients were given the opportunity to supply an additional comment at the end of the survey and almost three in ten (29%) Brokers did so. The majority of the comments were suggestions for improvement and/or criticism of the current AQIS situation, and are summarised below. Of the Brokers (63 of 219 people) who provided a comment, the three most common suggestions were:

- ❖ **More staff/more regional staff** (21%);
- ❖ **Need more accessible staff/accessible when required** (16%);
and
- ❖ **Need more consistent rule interpretation** (13%).

Approximately one in ten mentioned:

- ❖ AQIS needs better customer service (11%); and
- ❖ Needs faster turn-around times/takes too long for items to get through (11%).

Comments made by between 5% and 10% of respondents included:

- ❖ Need more awareness of the market place (8%);
- ❖ Need to improve communication/am not informed of changes (8%);
- ❖ Am happy/AQIS is doing a good job (8%);
- ❖ Negative/bureaucratic attitude (6%);
- ❖ Room to improve (5%);

- ❖ Generally dissatisfied with service (5%); and
- ❖ Improved services/getting better (5%).

These points have all been covered in various sections of the current report, and indicate that all relevant aspects considered important to Brokers have been examined in the 2006 survey.