

THE RESEARCH

FORUM

A document prepared for
Australian Quarantine and Inspection Service

**Dairy Clients
2005 Satisfaction Survey
Research Report**

Prepared by:
Dr Fadil Pedic
Jerry Goldfried

September 2005

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

CONTENTS

SURVEY SAMPLE.....	1
SAMPLE CHARACTERISTICS	1
OVERALL SATISFACTION	3
SATISFACTION WITH AND IMPORTANCE OF SPECIFIC AQIS SERVICE ATTRIBUTES	6
ASSESSMENT OF SERVICE AGAINST AQIS VALUES	9
BROAD AQIS ISSUES	18
FEES/CHARGES AND VALUE FOR MONEY	19
AQIS SERVICE CHARTER	20
INDUSTRY CONSULTATION.....	20
AQIS INFORMATION PRODUCTS	23
SPECIAL INTEREST ISSUES	24
CLIENT COMMENTS.....	26

DAIRY CLIENTS - 2005 SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 152 clients of AQIS Dairy Client Services were contacted by telephone to participate in the Customer Satisfaction Survey in 2005. Of these, 126 clients actually participated in the survey, giving an **overall response rate of 83%** - showing that there was a very good response to the survey among Dairy clients.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

Most respondents who participated in the survey were long-time clients of AQIS. Almost half the respondents (45%) had dealt with AQIS for 10 or more years. Approximately eight in ten respondents (78%) had dealt with AQIS for 3 years or more. This client profile has not changed significantly since 2003.

Length of time	% (n = 126)
Less than 12 months	6
1-3 years	16
3-5 years	15
5-9 years	18
10 years or more	45
Don't know	1
TOTAL	100 ¹

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

Regular AQIS contact office

Regular contact office	% (n = 126)
Melbourne	47
Brisbane	17
Sydney	12
Victoria - not Melbourne	12
Canberra	11
Perth	9
Adelaide	6
Hobart	3
Tas - not Hobart	2
WA - not Perth	2
Darwin	2
SA – not Adelaide	2
NSW - not Sydney	1
Queensland – Far North/Cairns/Townsville	1
NT – not Darwin	0
Queensland – South Qld not Brisbane	0

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 which Dairy clients liaise. Melbourne is the primary contact office with which almost one in two clients (47%) deal. As in past years, Brisbane and Sydney followed as the next most regular contact office for Dairy clients.

While the rank order of the offices has not changed significantly since 2003, the proportion of respondents noting Sydney as a regular contact office has decreased notably by 9%, down from 21% in 2003.

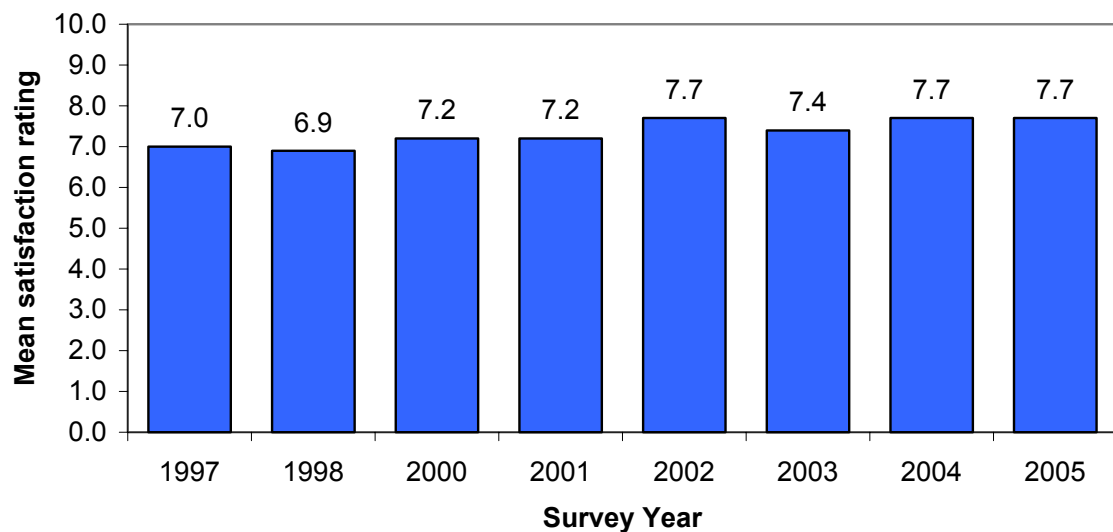
OVERALL SATISFACTION

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 vast majority of Dairy clients were satisfied with the service provided to them by AQIS, with 87% giving it a rating of 6 or more out of 10.** The proportion of respondents giving a rating of 10 (‘extremely satisfied’) in 2005 was 18% - a very positive result and 5% higher than in 2004.

Level of overall satisfaction with AQIS service (on a scale of 1-10)	% (n = 126)
1 (Extremely Dissatisfied)	2
2-5	12
6-9	69
10 (Extremely Satisfied)	18
TOTAL	100

With an **average satisfaction rating of 7.7 (out of 10)**, Dairy clients’ overall satisfaction with AQIS service was high in 2005 and equal to that achieved in 2004. Considered in the context of the last six years, presented in the figure below, **the 2005 overall satisfaction rating continues a slight positive trend.**

Dairy clients – Average rating of Overall Satisfaction with AQIS service



Consistency in satisfaction across AQIS offices

The majority of Dairy clients indicated that they usually deal with a single AQIS office – only 20% (or 25 respondents) said that they deal with more than one AQIS office. Clients who deal with more than one AQIS office were asked if their level of satisfaction is consistent across different offices. Generally, **levels of satisfaction are consistent across different offices**, though exact percentages are not reported due to the small sample size.

Changes in overall satisfaction over the last two years

Reflecting the high levels in overall satisfaction, approximately **one third of respondents said that their overall satisfaction had improved over the last two years**. Over half (54%) said that they were as satisfied now, as they were two years ago (when overall satisfaction levels were also relatively high). Only one in ten (10%) reported that they are less satisfied than two years ago.

Change in overall satisfaction over last 2 years	% (n = 126)
Improved	34
Stayed the same	54
Deteriorated	10
Don't Know	2
TOTAL	100

These figures are very similar to those reported since 2002. Little change in satisfaction has taken place over the last three years (as is apparent in the fact that overall satisfaction has not changed significantly either).

Main factors contributing to *improvement* in satisfaction

Of those (43 respondents) whose overall satisfaction had improved, improvement was largely attributed to staff communication style and efficiency (though exact percentages are not shown due to the small sample size):

- ❖ Staff being more approachable, and communicating better with clients;
- ❖ Staff providing more contact and personal service; and
- ❖ Staff being more efficient.

Main factors contributing to *deterioration* in satisfaction

Only 10% of respondents (13 people) reported that their overall satisfaction had deteriorated over the last two years. Of these respondents, attribution for this deterioration was relatively spread across a number of domains, a positive result indicating that there is no particular domain of AQIS service that is perceived as inadequate by a significant proportion of respondents. The factor reported most often was lack of staff knowledge (exact percentages are not reported here due to the very small sample size).

Changes that AQIS could make to improve levels of service

Respondents were asked (an open-ended question) about improvements that could be made to AQIS services.

Suggested changes to improve service	% (n = 126)
None/no improvements/no changes necessary	22
Better trained/more knowledgeable staff/specialist knowledge	19
More flexible/understanding	14
Improve understanding of business/my business	12
More accessible/contactable	11
Closer consultation with industry	11
More staff	8
Consistent rule interpretation	6
More efficient/faster processing	6
More information/updates	4
Adopt a team approach/work with us	3
Reduce fees/improve value for money	2
Better access to information/updates	1
Improved administration/invoicing/paperwork	0
Don't know	12
Other	2

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

Suggestions for improvement were widely spread across a number of domains in 2005. A significant proportion of respondents made the following suggestions:

- ❖ Better training of staff to develop specialist knowledge;
- ❖ More flexible/understanding in interpretation of rules and regulations;
- ❖ Improve understanding of business/my business;
- ❖ More accessible/contactable; and
- ❖ Closer consultation with industry.

Overall, this was a positive result indicating AQIS is performing well across most areas of service delivery and is not performing below the expectations of Dairy clients. This position is supported by the 22% of respondents who said that no improvements were necessary.

SATISFACTION WITH AND IMPORTANCE OF SPECIFIC AQIS SERVICE ATTRIBUTES

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

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

Respondents thought all but one of the attributes was very important. All but timely and accurate invoices was rated 8 or more out of 10 in importance. Generally, clients were satisfied with these important aspects of service. Average satisfaction ratings were equal to or above 6.7 out of 10 for all nine attributes.

This shows that AQIS performed well on all attributes and that AQIS is generally meeting the needs of this client group.

The attribute with the highest importance rating ('staff professionalism' 9.0 out of 10) was also that with the highest satisfaction rating (8.0 out of 10). Furthermore there was a reasonable positive relationship between respondents' ratings of importance and satisfaction with the nine attributes of AQIS service. In other words, clients were more satisfied with areas that were considered more important.

Overall, the AQIS Dairy Client Service Area is again 'healthy and on track' in 2005 – it understands client needs, knows what is important to this client group and generally provides it to them.

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Average rating - Satisfaction x Importance
Staff professionalism	8.0	9.0	72
Expectations are clear	7.2	8.9	64
Staff technical competence	7.4	8.7	64
Responsive to needs	7.3	8.7	62
Understand needs of business	7.2	8.6	62
Adopting team approach	6.9	8.2	56
Flexible	6.8	8.2	56
Value for money	6.7	8.1	54
Timely & accurate invoices	7.4	7.6	56

The last column in the table above provides an average 'product' score – that is, the average, of respondent's satisfaction score *multiplied* by their importance score, for each attribute of AQIS service. 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).

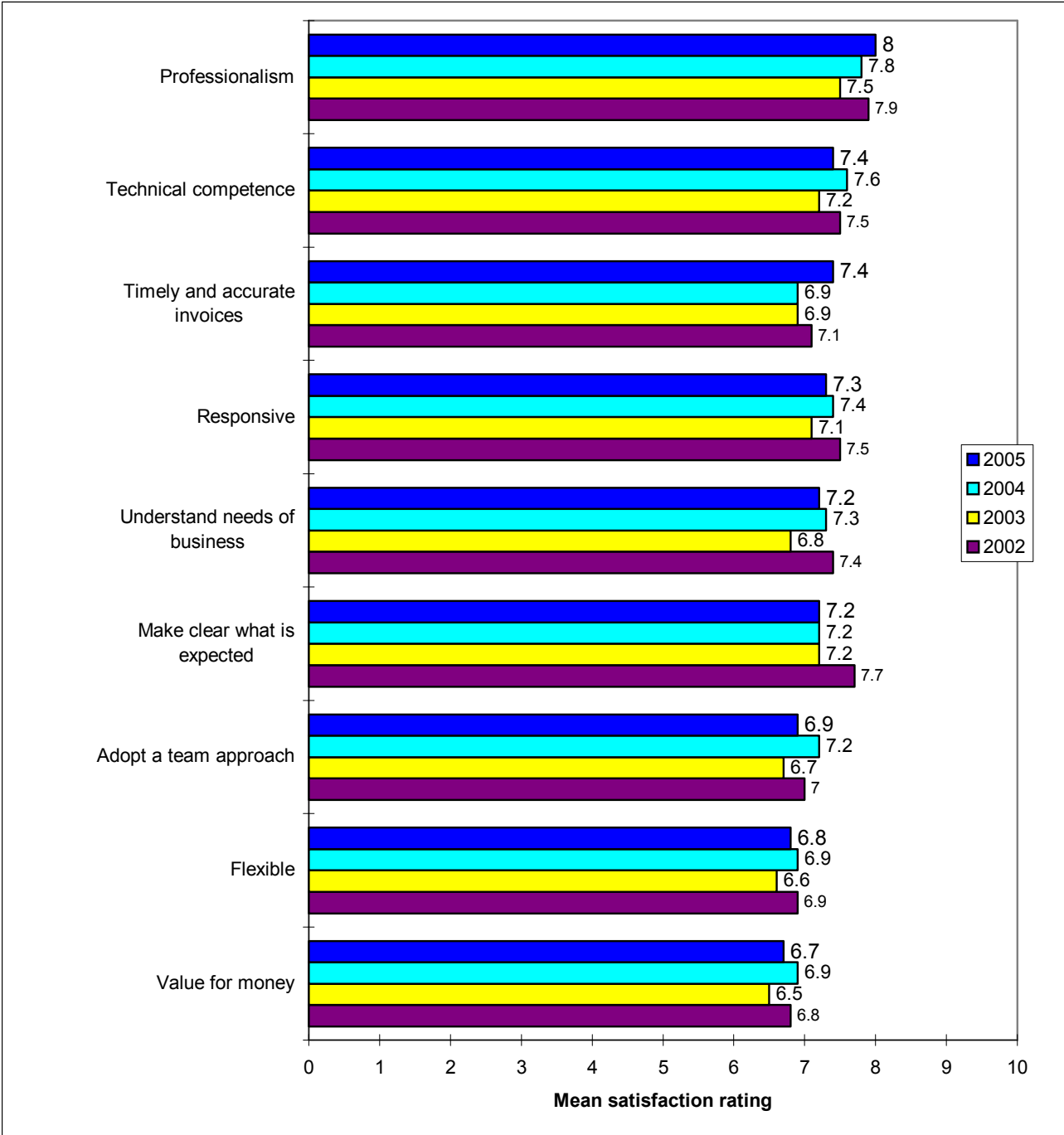
For Dairy clients, these final 'satisfaction x importance' scores range from 54 for 'value for money' to 72 for 'staff professionalism'. Thus satisfaction with AQIS services is generally high – all 'product' scores are greater than 50.

The figure below shows historical data for average satisfaction ratings. Looking at the average satisfaction ratings in 2005, the figure shows that clients' ratings of AQIS service have largely remained unchanged since 2004.

Only one significant change in satisfaction occurred:

- AQIS provides both timely and accurate invoices – increased by 0.5 points from 6.9 in 2004 to 7.4 in 2005.

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



ASSESSMENT OF SERVICE AGAINST AQIS VALUES

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

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

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

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

Professionalism of staff

Generally, staff professionalism was rated very highly by Dairy clients in 2005.

Consistent with the high level of satisfaction with 'staff professionalism' in the previous section of this report, the six attributes representing the 'professionalism of staff' factor were also rated highly.

Three in four or more clients agree that AQIS staff:

- Are very professional;
- Are well trained;
- Adequately explained QA/CA/Co-reg options; and
- Helped clients find solutions to their problems.

Furthermore, almost three quarters of respondents (72%) agree that AQIS services represent value for money and the majority disagree (77%) that the main aim of AQIS is just to raise revenue.

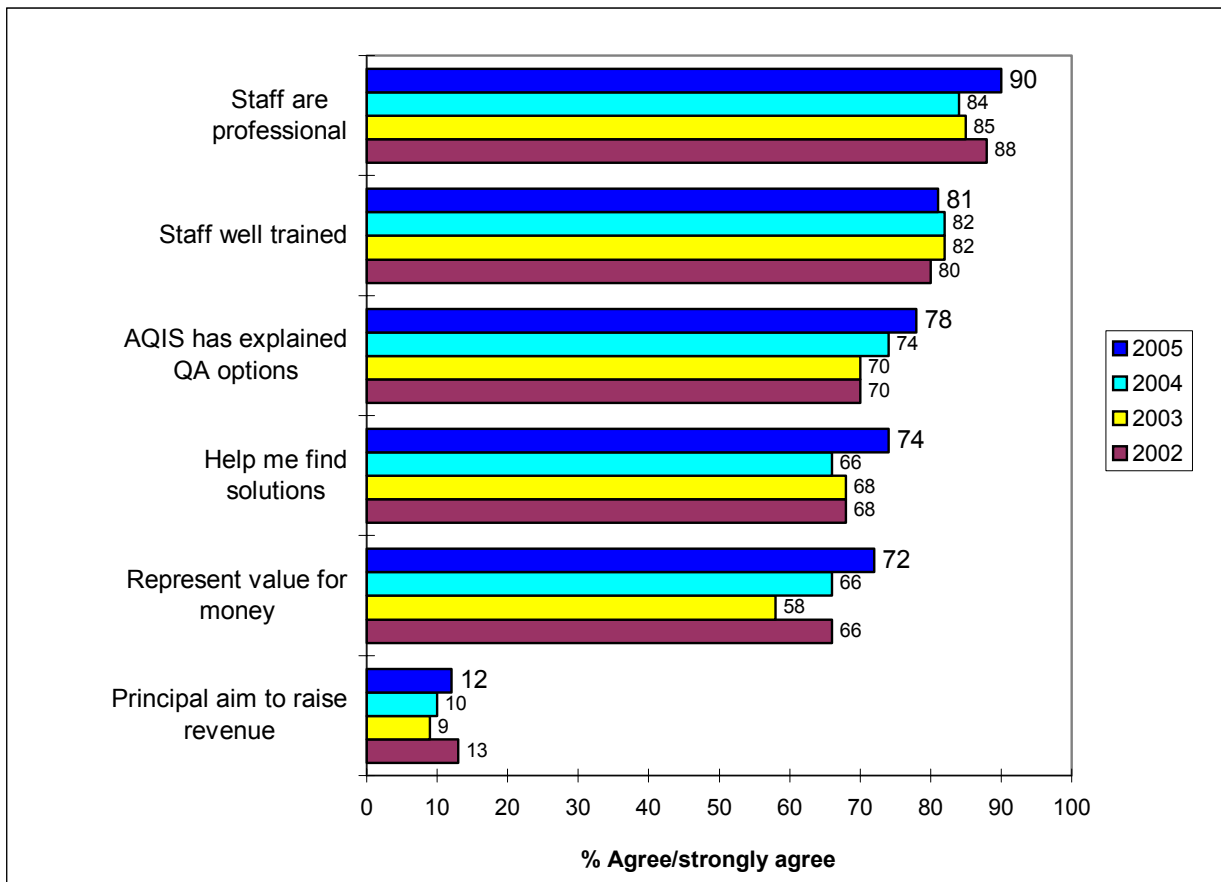
In comparison to 2004, four of the six indices of staff professionalism have increased in 2005. Dairy clients' opinion of staff professionalism improved notably re:

- The 'staff help me find solutions' – the proportion who agreed with this statement *increased* by 8%, to 74%;
- The 'tasks AQIS performs are value for money' – the proportion who agreed with this statement *increased* by 6%, to 72%;
- The 'staff are very professional' – the proportion who agreed with this statement *increased* by 6%, to 90%; and
- Staff adequately explained QA/CA/Co-reg options – agreement increased 4%, to 78% in 2005.

These time-series changes are shown in the figure overleaf.

Professionalism statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff are very professional	90	6	4
Staff well trained	81	10	9
Adequately explained QA/CA/Co-reg optns	78	8	15
Helps me find solutions	74	12	14
Tasks AQIS performs are value for money	72	13	15
Aim of AQIS is to raise revenue	12	11	77

Dairy clients – Ratings of Staff Professionalism – 2002 to 2005



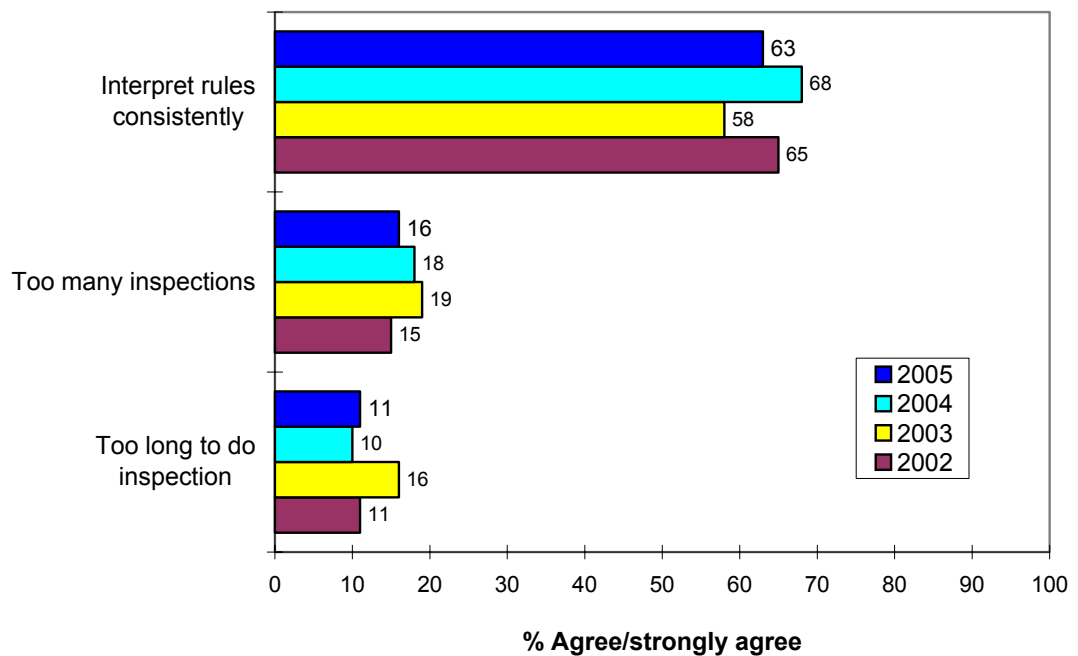
Integrity of staff

Respondents' ratings of staff integrity were moderate to high in 2005. Almost two thirds (63%) of respondents agreed that staff interpret rules and regulations consistently. Less than 1 in 5 respondents agreed that AQIS staff make too many inspections (16%) and only 1 in 10 agreed that staff take too long to do inspections.

However, in comparison to 2004, **there was a decrease in the proportion of clients who agreed that staff interpret rules and regulations consistently** (down 5% from 68% in 2004).

Integrity statements	2005 % Agree/ Strongly Agree	2005 % Neither/ Don't know	2005 % Disagree/ Strongly Disagree
Staff interpret rules & regulations consistently	63	12	25
Too many inspections	16	14	70
Staff take too long to do inspection	11	15	74

Dairy clients – Ratings of *Staff Integrity* - 2002 to 2005



Openness of staff and of the organisation

Satisfaction with the openness of AQIS staff and with the organisation as a whole was generally high in 2005.

Seven in ten or more of Dairy clients agreed that:

- ❖ AQIS listens to clients;
- ❖ AQIS are open about how they operate;
- ❖ AQIS responds promptly to requests for assistance;

- ❖ AQIS's expectations are clear; and
- ❖ They can contact AQIS when needed.

Compared with 2004, however, some of the openness ratings declined. The issue of opening hours and ability to contact AQIS was particularly evident here. In 2005:

- ❖ 12% fewer clients said that AQIS's hours reflect industry needs; and
- ❖ 6% fewer said they could contact AQIS when needed.

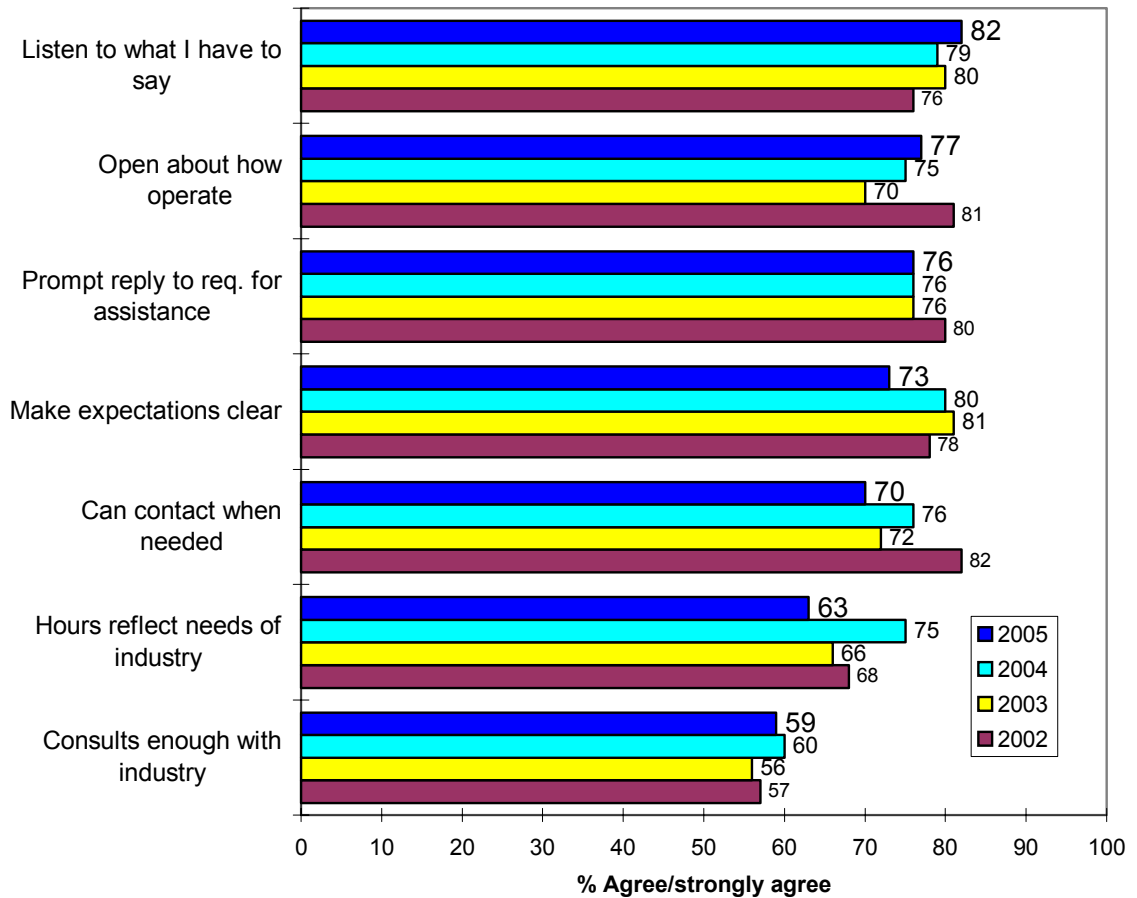
It should also be noted that one third of clients disagree that AQIS's hours of operation reflect industry needs.

Furthermore, the proportion of clients saying that 'AQIS make it very clear what they expect from me' declined by 7% from 2004.

The most divisive statement in the area of openness was to do with the level of industry consultation. While just under 3 in 5 clients (59%) agree that AQIS engages in 'enough' industry consultation, 1 in 4 (26%) disagree that it does so. (Although this has not changed since 2002.)

Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Listens	82	9	9
Open about how they operate	77	11	12
Respond promptly to requests for assistance	76	12	12
Expectations are clear	73	9	18
Can contact AQIS when needed	70	3	27
Hours of operation reflect needs	63	6	31
Consults enough with industry	59	15	26

Dairy clients – Ratings of Staff Openness – 2002 to 2005



Fairness of staff

Respondents' ratings of staff fairness were moderate in 2005. Moderate to high levels of clients agreed with the following positive statements:

- ❖ Responds promptly to requests for information (79%);
- ❖ Makes positive contribution to business success (70%); and
- ❖ Take needs of business into account (59%).

However, a significant proportion of respondents also agreed with the following negative statements:

- ❖ AQIS should devote more time to assistance/less to policing/regulating (39%)
- ❖ Charge rates too high (39%), up 10% since 2004; and
- ❖ Staff apply rules & regulations too strictly (23%) – down 5%.

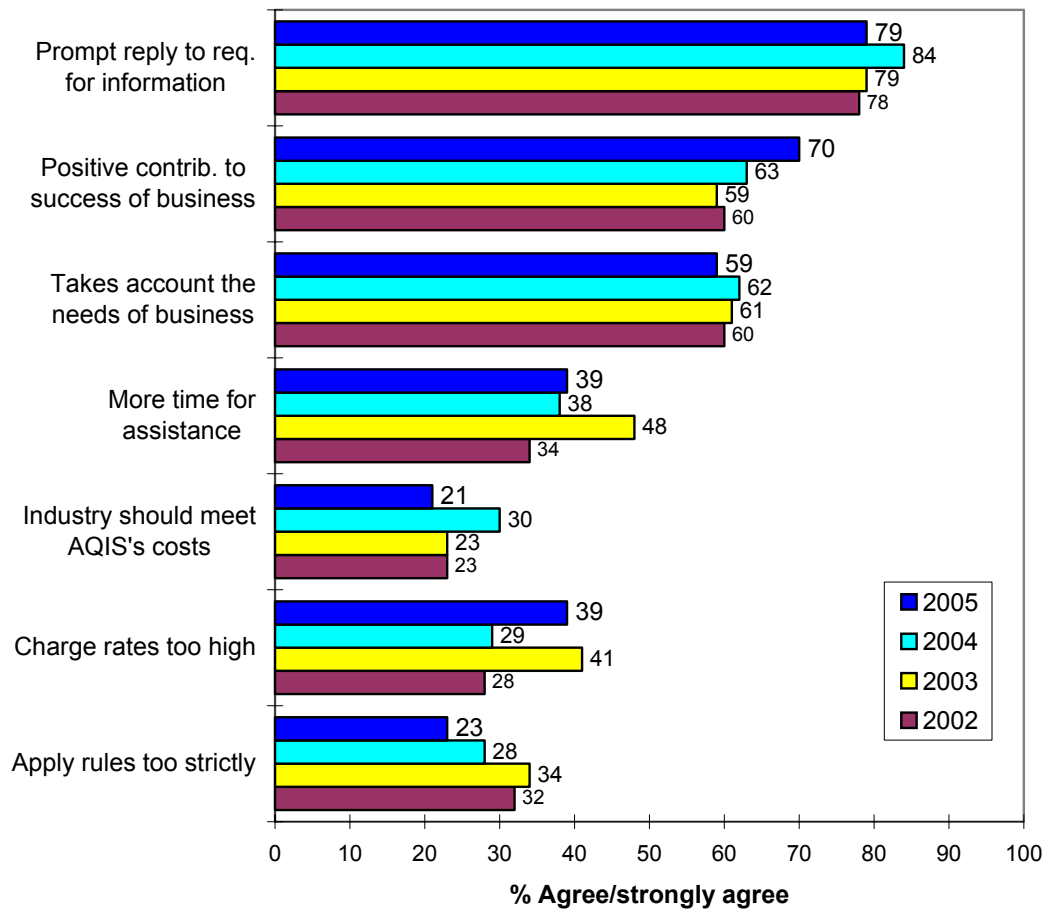
In comparison to 2004 levels, one important gain in approval is noted in the index of fairness: 7% more clients say that AQIS makes a positive contribution to the success of their business. This is supported by the fact that 5% fewer clients now agree that staff apply rules and regulations too strictly (down from 28% to 23%).

These gains are set against three negative movements since 2004:

- ❖ Charge rates too high - agreement increased by 10% since 2004, to 39%;
- ❖ Industry should meet all of AQIS's costs – agreement decreased 9% from 30% to 21%; and
- ❖ Responds promptly to requests for information – agreement decreased by 5% from 84% in 2004, to 79% in 2005.

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	79	10	11
Makes positive contribution to business success	70	16	13
Take needs of business into account	59	13	28
Should devote more time to assistance/less to policing/regulating	39	23	38
Charge rates too high	39	28	33
Staff apply rules & regulations too strictly	23	20	55
Industry should meet all of AQIS's costs	21	13	65

Dairy clients – Ratings of Staff Fairness – 2002 to 2005



Respect

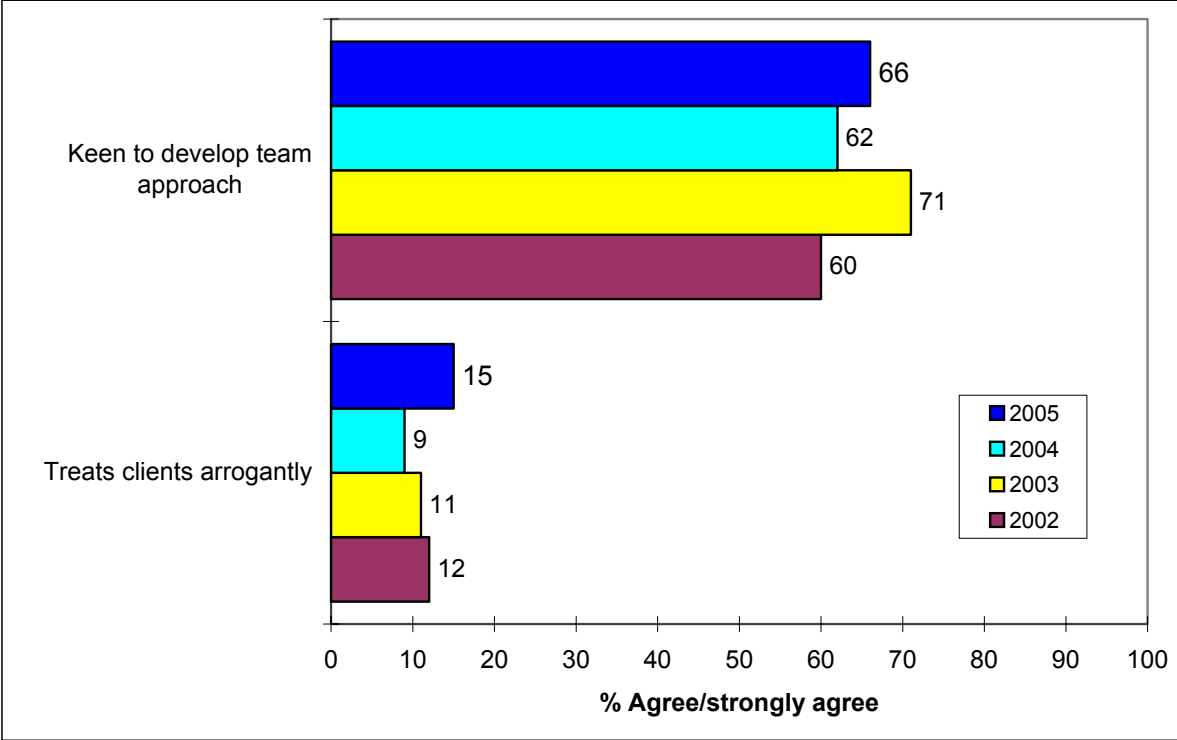
Respondents rated AQIS staff respect moderately well.

About two thirds of respondents (66%) agreed that AQIS is keen to develop a team approach with the industry. Almost four in five respondents (79%) *disagreed* that AQIS staff treat their clients arrogantly. **However, it is of some concern that more Dairy clients this year feel that AQIS staff treat clients arrogantly** (up 6% from 9% in 2004).

Respect statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Keen to develop team approach	66	21	12
Treats clients arrogantly	15	7	79

On the positive side, 4% more clients indicated in 2005 that AQIS is keen to develop a team approach with industry, as illustrated in the figure below.

Dairy clients – Ratings of Staff Respect – 2002 to 2005



BROAD AQIS ISSUES

Primary role and function of AQIS

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

Primary role & function of AQIS	% (n = 126)
Protect Australia from incoming pests/diseases	28
Monitor quality of exports	18
Facilitate/administer exports	14
Responsible for regulations	14
Ensure compliance	9
Monitor quality of imports	7
Facilitate/administer imports	4
Represent Australia's interest overseas	3
Other	2
Don't Know	2

Approximately a quarter of respondents (28%) said that AQIS's main role is to protect Australia from incoming pests and diseases. This percentage has remained steady since 2003. Fewer than one in five respondents (18%) felt that AQIS's primary role is to monitor the quality of exports.

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?"

The large majority of respondents (94%) were involved in exports, and of these **87% (or 103 people) felt that the AQIS label does add high or at least some value when it comes to accessing overseas markets.** This is a very positive result and is 4% up on the 2004 figure (when 88% were involved in exports and 83% of these exporters placed high or some value on the AQIS label).

Value of AQIS label	2004 % (n = 122)	2005 % (n = 126)
High value	53	69
Some value only	20	13
Low value	6	2
No value at all	5	6
Don't know/Depends	6	4
Not involved in exports	12	6
TOTAL	100	100

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 = 126)
1 (Very poor value for money)	1
2-5	29
6-9	60
10 (Very good value for money)	10
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*).

Seven in ten respondents (70%) gave AQIS service value for money a rating of 6 or higher out of 10. This is 7% higher than the comparable 2004 figure. However, a significant proportion (30%) still rated value for money as five or less in 2005.

The average rating of value for money among Dairy clients was **6.7 out of 10** – this is a result towards “good value for money”. In comparison to 2004 figures (average of 6.4), **satisfaction with value for money has increased slightly**.

Changes to AQIS charges over the last 12 months

Changes to AQIS charges over the last 12 months	2004 % (n = 122)	2005 % (n = 126)
Decreased	9	3
Stayed the same	37	37
Increased	20	18
Don't know	32	40
Both increased and decreased	2	2
TOTAL	100	100

Dairy clients' views re changes in AQIS charges have remained largely unchanged since 2004. The only change is that while in 2004 some 9% said that charge rates have *decreased* over the last 12 months, only 3% said this in 2005. The most popular answer was that they stayed the same (37%). A further 2 in 5 clients simply did not know whether charges had changed, indicating they did not deal with AQIS when it came to chargeable services.

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Aware of AQIS Service Charter	2004 % (n = 122)	2005 % (n = 126)
Yes	32	14
No	67	84
Don't know	1	3
TOTAL	100	100

Respondents were asked whether or not they are aware that AQIS has a Service Charter. Only 1 in 7 of respondents (14%) said that they are aware of the Service Charter. This figure has decreased significantly in the last year by 18%. **The AQIS Dairy client service area should continue consistently communicating with clients about the AQIS Service Charter to increase this very low awareness level.**

Awareness of Service Standards in the Charter

Of those (17 Dairy clients) that are aware of the Charter, the majority (10) are aware of the actual standards therein (although the exact percentage is not reported here due to the small sample size).

How often Service Standards are met

All clients were then read out three of the service standards contained within the Service Charter and asked to state to what extent AQIS had met each standard over the last 12 months. **In 2004, as in 2003, at least three quarters of the clients said that AQIS 'always' or 'often' met each of the three standards** (specific achievement rates shown in the last row of the table below).

In summary, service standards are being met most of the time for most of the clients.

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 = 126)	"Answers your telephone calls or messages promptly during normal office hours" % (N = 126)	"Responds to your requests for printed information within 5 working days of receipt" % (N = 126)
Always	78	54	55
Often	13	22	21
Sometimes	5	18	10
Rarely	1	3	2
Never	2	2	1
Don't know	2	1	11
TOTAL	101	100	100
Always + Often			
2003	88	75	67
2004	83	77	76
2005	91	76	76

In comparison with 2004 findings, meeting the standards either 'always' or 'often' was more likely in 2005 for the standard 'replies to your correspondence within 20 working days of receipt'. Likelihood of meeting this standard increased by 8%. The other two standards remained relatively unchanged in this respect.

INDUSTRY CONSULTATION

Awareness of Peak Organisations that consult with AQIS

Approximately three in ten (30%) Dairy clients surveyed were aware of Peak Industry Organisations that consult with AQIS to represent their interests. This figure has not changed significantly since 2003 (down only 2% since 2004). However compared to 2002 (when awareness was 43%), the 2005 awareness rate has continued the decreasing trend.

Awareness of Peak Industry Organisations	2004 % (N = 122)	2005 % (N = 126)
Yes	32	30
No	63	64
Can't say	5	6
TOTAL	100	100

Membership of Peak Industry Organisations

Of those Dairy clients who are aware of Peak Industry Organisations representing their interests, the majority (68%) are currently members of this peak body. Membership rates among those aware of peak industry organisations was higher in 2004 (however statistical comparison is not included considering the small sample size).

Currently a member of peak industry body	2004 % (n = 39)	2005 % (n = 37)
Yes	80	68
No	21	32
TOTAL	100	100

AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin?	2004 % (N = 122)	2005 % (N = 126)
Yes	53	41
No	42	55
Don't know	5	4
TOTAL	100	100

Less than half the Dairy clients surveyed reported receiving the AQIS Bulletin in 2005. This has decreased significantly by 12% since the previous survey (2004).

Amongst those who do receive it, readership of the Bulletin is very high: **77%** of those who do receive it **read every edition** and a further 14% read it every few months. Furthermore, most of those who receive it also read most of it: **78% read half or more of the Bulletin** (only 18% read a quarter or less of it).

Finally, **most of those who receive it (83%) judge it to be useful:**

- ❖ 39% say it is very useful; and
- ❖ 44% say it is somewhat useful.

About 1 in 7 (15%) feel it is of little use while only 2% judge it as 'not at all useful'.

AQIS Website

Approximately 3 in 4 clients reported visiting the AQIS website. This represents a significant increase in website visitation since 2004, this figure having **increased by 17%**.

Have you visited the AQIS website	2004 % (N = 122)	2005 % (N = 126)
Yes	57	74
No	43	26
TOTAL	100	100

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

- ❖ 5% visit daily;
- ❖ 20% visit weekly;
- ❖ 45% visit monthly;
- ❖ 20% visit only once or twice a year;
- ❖ 2% visit every two years; and
- ❖ 5% visit only if they know there is something new on the website.

Most of those who visit the website (84%) judge it to be useful:

- ❖ 46% say it is very useful; and
- ❖ 38% say somewhat useful.

Only 16% feel the website is of little use while non one judges it as 'not at all useful'.

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

❖ Dairy	16%
❖ Exporting live animals and reproductive material (inc. pets)	16%
❖ Export facilitation	14%
❖ Phyto.....	7%
❖ Food.....	7%
❖ Import requirements.....	7%
❖ Unsure/don't know	7%
❖ Useful links: Export	7%
❖ Other	6%
❖ Icon.....	5%
❖ EXDOC	4%
❖ Exporting fish and fish products.....	2%
❖ Elmer2.....	2%
❖ Fees and charges: Export	2%
❖ Exporting organic and bio-dynamic products	1%

Clearly, dairy, exporting live animals and export facilitation are three popular areas for this client group.

SPECIAL INTEREST ISSUES

QA arrangement vs. End-product Inspection

Respondents were asked if they have an AQIS Co-Regulation quality assurance, or end-product inspection system in place. In both 2004 and 2005 just over half of the Dairy clients (52%) reported that they have a quality assurance arrangement. This decreased 21% since 2003 (when 73% reported having a QA arrangement).

QA arrangement or End-product Inspection system in place	2004 % (N = 122)	2005 % (N = 126)
QA	52	52
End-product	48	48
TOTAL	100	100

Type of QA arrangement

Of those (65 respondents) who have a QA system in place, 34% have the Food Processing Accreditation (FPA) system in place, and 17% have the AQIS Approved Quality Assurance (AQA) system.

Since the 2003 survey the proportion of clients reporting to have the FPA system has remained very similar through 2004-05 while the proportion who said they have the AQA system has decreased substantially (down 28%, from 45% in 2003 to 17% in 2005).

Type of QA arrangement	2004 % (n = 63)	2005 % (n = 65)
Food Processing Accreditation (FPA)	35	34
Approved Quality Assurance	29	17
MSQA/Meat Safety Quality Assurance	11	-
Other	8	23
HACCP/Hazard Analysis and Critical	3	-
Approved Certifying Organisation	3	5
Don't know	11	22
TOTAL	100	100

Dairy clients with AQIS approved QA/CA/Co-reg systems were then 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.

Three in four Dairy clients felt that AQIS was very *helpful* in the development of their QA/CA or co-regulation system and that AQIS was very *knowledgeable* about the relevant systems. Overall this is a very positive result, though it should be noted that in 2005 one in five clients disagreed that AQIS was helpful (this is an increase on the same figure in 2004 when only 8% disagreed).

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	73	6	21
AQIS is very knowledgeable about QA/CA or Co-regulation systems	75	11	15

The table below shows that the overwhelming majority of Dairy clients (86%) with AQIS approved QA/CA/Co-reg systems believes the system is working well. This is unchanged since 2004.

Is the Co-regulation/Quality Assurance/ Compliance system working well	2004 % (n = 63)	2005 % (n = 65)
Yes	89	86
No	11	14
TOTAL	100	100

Of those who had a QA/CA/Co-reg system in place, the 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 satisfactions levels found in 2005.

Improvements to QA/CA/Co-reg systems

Dairy clients with AQIS approved QA/CA/Co-reg systems were asked what improvements they could suggest to the system. As in past years, almost half the clients (45%) said that they could not think of any improvements to the system.

The improvements that were suggested by clients (shown in the table below) were spread over a number of domains with no one issue in particular being represented by a significant proportion of clients.

Altogether, these findings provide evidence that the system is working well according to Dairy clients.

Improvements to QA/CA/Co-reg systems	2005 % (N = 126)
None	45
System needs to be simplified	8
AQIS needs to work more closely with industry	8
AQIS needs to increase its presence	5
Training process needs review	3
System should cost less	2
Don't know	8
Other	23

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

QA system audit

Respondents who have a QA system in place were also asked who audits their system. As in 2004, just under **two thirds (62%) reported that they are audited by AQIS**. Two other significant proportions reported that they are audited by the State Dairy Authority (17%) and other accredited bodies (15%) respectively. These figures have not changed significantly since 2003.

It is noted that approximately one in 16 clients reported not knowing who audits their QA system.

Who audits QA system?	2004 % (n = 63)	2005 % (n = 65)
AQIS	64	62
State Dairy Authority	16	17
Other accredited body	13	15
Don't know	8	6
TOTAL	100	100

Note: the total % for the column is over 100 due to rounding.

Satisfaction with auditors of QA system

These clients were also asked to rate their level of satisfaction with the auditors of their QA system, on a five-point satisfaction scale. The vast majority (86%) were satisfied (i.e. 'satisfied' or 'very satisfied') with their auditors. Satisfaction with auditors has also remained relatively stable since 2003.

Sample size was too small to allow valid determination of differences (or otherwise) in satisfaction between those with different auditors and/or QA systems.

Satisfaction with auditors of QA system	2004 % (n = 63)	2005 % (n = 65)
Very satisfied	49	60
Satisfied	35	26
Neither satisfied nor dissatisfied	8	2
Dissatisfied	5	5
Don't know	3	8
TOTAL	100	100

CLIENT COMMENTS

Dairy clients were given the opportunity to provide any additional comments at the end of the survey and 25% (or 32 respondents) did so. The 50 comments they generated in total were either suggestions for improvement, criticism or (mostly) praise for current AQIS services and efforts.

It is noted that the sample size is small and thus percentages of actual comments are not presented in the table below. **The main factor that stands out from this data is that 30 of the 50 comments were positive.** In addition, of the improvements suggested, none received backing from a substantial proportion of clients. This is generally indicative of a healthy system with no significant existing client problem area.

The comments are presented in the table below. The points have all been covered in various sections of the current report and indicate that all relevant aspects considered important to Dairy clients have been examined.

Additional comments made by Dairy clients	Number of mentions from clients (n = 32)
Happy/you are doing a good job	11
Helpful and responsive	6
Performs a valuable and necessary service	6
Good service/excellent customer service	5
Need more staff/more regional staff	5
More contactable staff/not just answering machines	3
Other negative comments/suggestions	3
Don't understand my business	2
Better communication – not informed re delays	2
Professional	2
Fees are too high/need flexible fee structure	1
Not enough flexibility	1
Unprofessional/bad customer service	1
Poorly trained staff	1
Closer industry consultation needed	1

Overall, this is a very positive result indicating AQIS is performing well across all areas of service delivery and is performing at the level of Dairy clients' expectations.