

THE RESEARCH

FORUM

A document prepared for
Australian Quarantine and Inspection Service

**Export Meat Clients
2005 Satisfaction Survey
Research Report**

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EXPORT MEAT CLIENTS - 2005 SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 120 clients of AQIS Export Meat Services were contacted by telephone to participate in the Customer Satisfaction Survey in 2005. Of these, 91 clients actually participated in the survey, giving an **overall response rate of 76%** - showing that there was a very positive response to the survey among Export Meat clients.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

Just over half of the Export Meat respondents had dealt with AQIS for 10 years or more (55%). Almost 4 in 5 (79%) had dealt with AQIS for 5 or more years while just 1 in 5 (21%) had dealt with AQIS for less than three years.

As shown in the table below, the 2005 sample of clients had slightly longer contact with AQIS than those in the 2004 sample. In 2004, 65% had 5+ years of contact compared to 79% in 2005.

Length of time dealing with AQIS	% (n = 102) 2004	% (n = 91) 2005
Less than 12 months	8	2
1-3 years	18	9
3-5 years	10	10
5-9 years	27	24
10 years or more	38	55
TOTAL	100 ¹	100

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

On-site AQIS staff

Just over 4 in 10 (42%) of Export Meat clients indicated that they have AQIS staff on-site in 2005. This proportion has increased slightly (by 3%) since 2004, when (39%) reported having AQIS staff on-site. Of these (in 2005), most (60%) have five or fewer AQIS staff on premises.

Number of on-site AQIS staff	2005 % (n = 40)
Under 5	60
5-9	32
10+	8
TOTAL	100

Frequency of contact with AQIS

Most Export Meat clients have frequent contact with AQIS. More than half (55%) of Export Meat clients have daily contact with AQIS, and another 1 in 5 (21%) have weekly contact. Only 1 in 25 (4%) have contact every couple of months.

These figures have slightly increased since 2004, as shown in the table below.
The 2005 sample of clients had more frequent contact with AQIS.

Contact with AQIS	% (n = 102) 2004	% (n = 91) 2005
Daily	53	55
Weekly	17	21
Fortnightly	2	11
Monthly	13	8
Every couple of months	8	4
Less often/varies/depends on work flow	7	1
TOTAL	100	100

Regular AQIS contact office

Regular contact office	% (n = 91)
Canberra	32
Sydney	25
Brisbane	23
Melbourne	22
Adelaide	14
Perth	10
NSW- not Sydney	7
Victoria - not Melbourne	3
WA - not Perth	1
Tasmania - not Hobart	1
Queensland - South Queensland	1
SA not Adelaide	1

Note: The percentages in the above table add to more than 100%, as respondents were able to report more than one regular contact office.

The table above shows the main AQIS office with which Export Meat clients liaise. As expected, the capital cities (especially Canberra) dominate as the primary contact offices. The main AQIS contact offices in 2005 remained those reported in 2004.

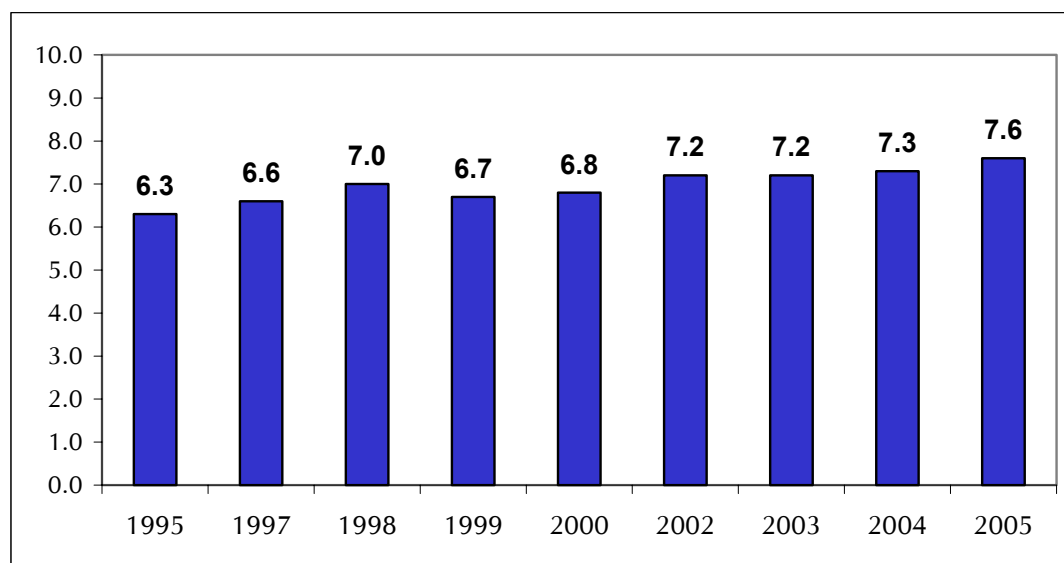
OVERALL SATISFACTION

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 Export Meat clients 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 = 91)
1 (Extremely Dissatisfied)	1
2-5	9
6-9	63
10 (Extremely Satisfied)	15
TOTAL	100

Respondents’ overall satisfaction with AQIS service was therefore relatively high in 2005. The **average satisfaction rating was 7.6** out of 10. This rating is higher than that recorded in 2004 (when it was 7.3) and represents the **highest average satisfaction rating recorded since 1995**. This result continues a positive trend, with respondents being slightly more or equally satisfied in each survey period since 1999, as shown in the figure below.

Export Meat – Average Overall Satisfaction with AQIS service -1995-2005



Consistency in satisfaction across AQIS offices

The majority of Export Meat clients (68%) indicated that they usually deal with a single AQIS office. Only a third (32%) said that they deal with more than one AQIS office. Clients who dealt with more than one AQIS office were asked if their level of satisfaction was consistent across different offices. Generally, the levels of satisfaction **were consistent** across different offices, though exact percentages are not reported due to the very small sample size.

Changes in overall satisfaction over the last two years

Reflecting the improvement in overall satisfaction, the majority of Export Meat clients (55%) reported that their overall satisfaction with AQIS had **stayed the same over the last two years**. Encouragingly, almost 2 in 5 (38%) reported improved satisfaction while only 7% reported deterioration over the last two years. The distribution of changes in overall satisfaction is an improvement on that reported in 2004 as shown in the table below.

Change in overall satisfaction over last 2 years	% (n = 102) 2004	% (n = 91) 2005
Improved	32	38
Stayed the same	52	55
Deteriorated	12	7
Don't Know	4	0
TOTAL	100	100

Main factors contributing to *improvement* in satisfaction

Of those (35 Export Meat clients) whose overall satisfaction had improved, most attributed this improvement to five dimensions of staff service (exact percentages are not reported here due to the small sample size):

- ❖ Staff are now more approachable and communicate better with clients;
- ❖ Staff now provide more contact/personal service;
- ❖ Staff provide a team approach/more flexible; and
- ❖ Staff are better trained.

Main factors contributing to *deterioration* in satisfaction

Only 7% of respondents (6 people) reported that their overall satisfaction had deteriorated over the last two years. Considering the small sample size, percentages are not reported here. The four main reasons noted by those who experienced deterioration in satisfaction over the last two years were: inconsistent rule interpretation, unprofessional staff, not enough staff/not available when needed, and lack of knowledge among staff.

Changes that AQIS could make to improve levels of service

Suggested changes to improve service	% (n = 91)
More flexible/understanding	19
Better trained/more knowledgeable staff/specialist knowledge	15
None/no improvements/no changes necessary	15
Consistent rule interpretation	14
More accessible/contactable	5
Reduce fees/improve value for money	5
More information/updates	4
Improve understanding of business/my business	3
Closer consultation with industry	3
More efficient/faster processing	3
Better access to information/updates	3
Adopt a team approach/work with us	3
More automated quarantine entry processing	2
More staff	1
Other	11
Don't know	7

Note: The percentages in the above table add to more than 100%, as respondents were able to make more than one suggestion to improve service levels.

Respondents were asked (an open-ended question) about improvements that could be made to AQIS services. In both 2004 and 2005, three changes to improve levels of AQIS service were noted by more than one in ten respondents. These were:

- ❖ More flexible/understanding;

- ❖ Better trained/more knowledgeable staff/specialist knowledge; and
- ❖ Consistent rule interpretation.

In comparison to 2004, the proportion of respondents making the main suggestions had declined slightly but consistently in 2005 – a positive result.

Also on a positive note, approximately 1 in 7 respondents (15%) said that no improvement was necessary; this was also the case in 2004.

SATISFACTION WITH AND IMPORTANCE OF SPECIFIC AQIS SERVICE ATTRIBUTES

Respondents were asked to rate (i) the importance of, and (ii) their satisfaction with nine attributes of AQIS service on a 1-10 scale (1 being '*not at all important/extremely dissatisfied*', and 10 being '*extremely important/extremely satisfied*'). Asking clients to rate how important they perceive particular attributes of AQIS service to be, enables AQIS to identify the needs of each client group, and to improve services to these groups. It is, in effect, developing a *client values framework* for each client group. By measuring client satisfaction against these values, AQIS can identify areas of service that are fulfilling clients' needs, or areas of service that need to be improved.

According to respondents, the three most important attributes of AQIS service are 'Staff technical competence', 'Responsive to needs', and 'Expectations are clear' (these three attributes achieved an average importance rating of 8.7 out of ten). Respondents not only thought that these attributes were important, but were also satisfied with these aspects of service. Average satisfaction ratings were 7.2 for Staff technical competence, 7.3 for Responsive to needs' and 7.2 for Clarity of expectations.

Other very important service attributes for Export Meat clients were:

- ❖ Staff professionalism (rated 8.6 out of 10); and
- ❖ Understanding the needs of business (8.2 out of 10)

Furthermore, there was generally a positive relationship between respondents' ratings of importance and satisfaction with the nine attributes of AQIS service. In other words, clients were more satisfied with service areas they considered more important.

The weakest performing item in terms of satisfaction rating in 2004 was perceived 'value for money' with a rating of 6.2 out of 10, this has had a positive improvement to 6.7 in 2005. While still in positive territory there is considerable room for improvement on this attribute.

Overall, AQIS Export Meat client services area is 'on track' – it understands client needs, knows what is important to this client group and generally provides it to them. However, there remains room to improve satisfaction.

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Average rating - Satisfaction X Importance
Staff professionalism	7.3	8.6	63
Staff technical competence	7.2	8.7	63
Responsive to needs	7.3	8.7	63
Expectations are clear	7.2	8.7	63
Timely & accurate invoices	7.4	7.0	52
Understand needs of business	7.0	8.2	57
Adopting team approach	6.7	7.8	52
Flexible	6.7	8.0	54
Value for money	6.7	7.8	52

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:

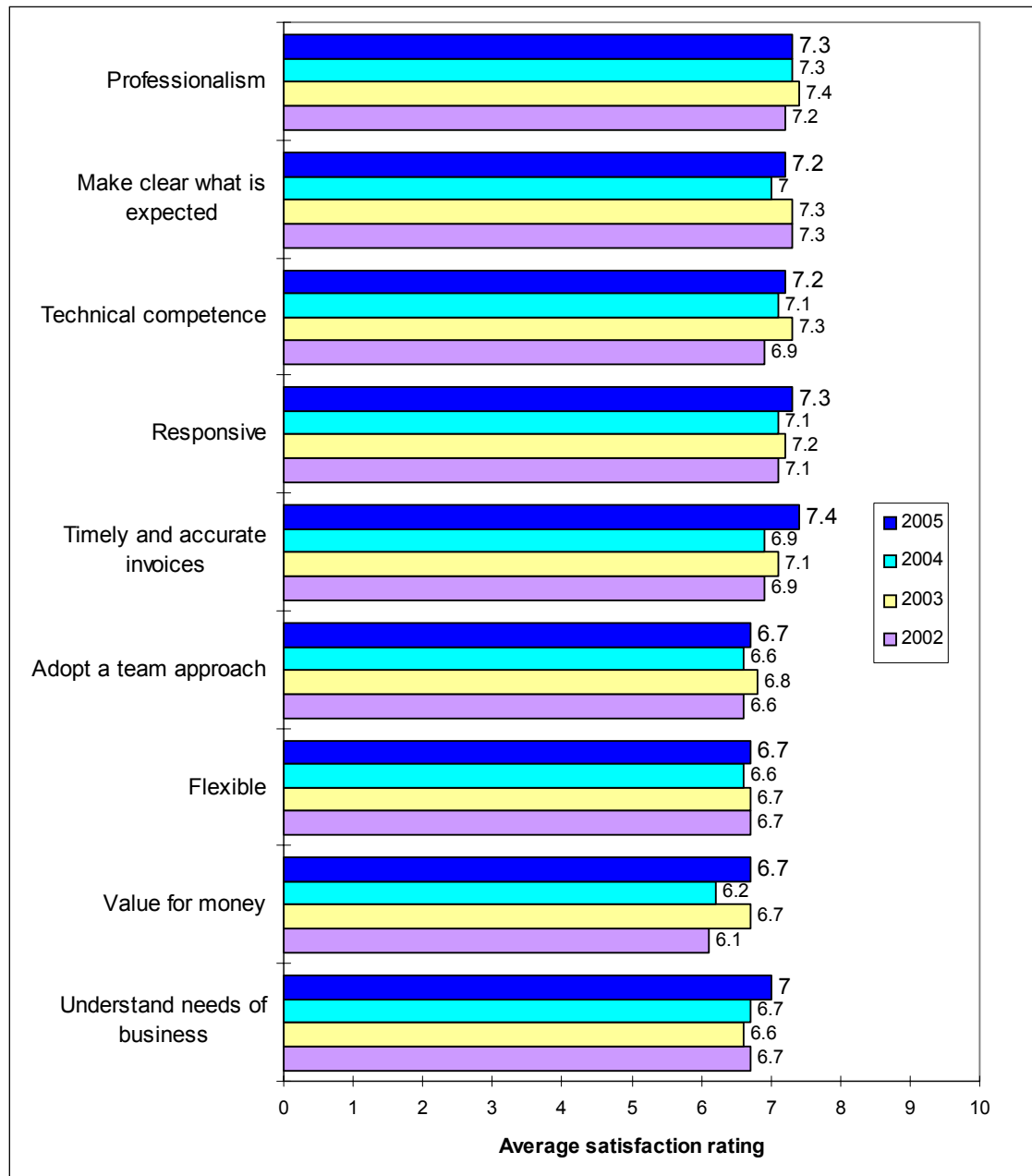
- ◇ 1 (extremely dissatisfied with an attribute that is not at all important) to
- ◇ 100 (extremely satisfied with an attribute that is extremely important).

For Export Meat clients, these final 'satisfaction x importance' scores range from 52 (for three attributes - value for money, adopting team approach, and timely/accurate invoices), to 63 (for four attributes - staff professionalism, staff technical competence, responsive to needs, and clear expectations).

Thus, overall perceptions of **AQIS service for these clients are generally healthy (moderate) with the attributes of AQIS service examined perceived relatively important and satisfaction with these attributes in positive territory.**

Comparisons with historical data in the figure below (of average satisfaction ratings) show that the **satisfaction ratings for eight of the nine attributes increased slightly since 2004**. While none of the changes in satisfaction ratings were significant, the increases since 2004 represent a positive turnaround compared with the decreases noted between 2003 and 2004. This was especially evident with increased satisfaction regarding value for money and provision of timely and accurate invoices.

Export Meat – 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, professionalism of AQIS staff was rated highly by Export Meat clients in 2005. Seven in ten (or more) Export Meat respondents agreed that:

- ❖ Staff are professional (79% agreed);
- ❖ AQIS helps clients find solutions to their problems (78% agreed);
- ❖ Staff are well trained (74% agreed); and that
- ❖ Staff adequately explained Quality Assurance/Compliance Agreement/Co-regulation options (75% agreed).

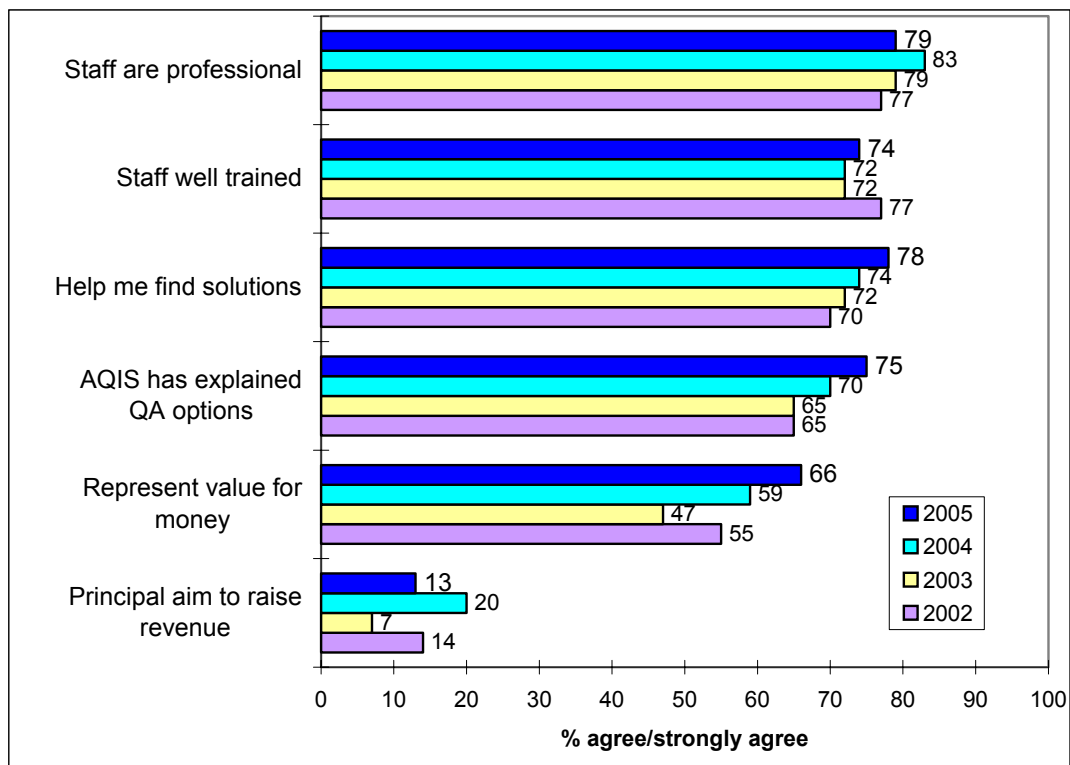
While the proportion of Export Meat clients who agreed that the tasks AQIS performs are value for money increased 7% since 2004, a significant proportion (17%) still disagree with this view.

Finally, **the vast majority (74%) did not agree that AQIS's principal aim was to raise revenue.** This figure has not changed since 2004.

Professionalism statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Staff are professional	79	14	7
Helps me find solutions	78	8	14
Staff well trained	74	8	19
Adequately explained QA/CA/Co-reg optns	75	8	17
Tasks AQIS performs are value for money	66	18	17
Aim of AQIS is to raise revenue	13	12	74

Taking into account the changes since 2004 (one decrease and five increases in satisfaction) **professionalism ratings have overall improved since 2004.** Improvement is especially noted with regard to perceived value for money of AQIS services, explanation of QA/CA/Co-regulation options and fewer clients feeling revenue raising is AQIS's main aim.

Export Meat – Ratings of Staff Professionalism – 2002–2005



Integrity of staff

Respondents' ratings of staff integrity were moderate in 2005. Almost half of the Export Meat clients (44%) agreed that there *is* consistency in the interpretation of rules and regulations amongst staff. However, a significant proportion of clients disagrees (40%). In fact, since 2004 agreement with this view has decreased by 16% - significantly **fewer clients now agree that rule interpretation is consistent**. In terms of inspections, while the majority *did not* agree that AQIS takes too long to do inspections (67% disagreed), or conducts too many inspections (61% disagreed) a significant proportion (approximately 1 in 4) agree that AQIS conducts too many inspections and takes too long to do inspections.

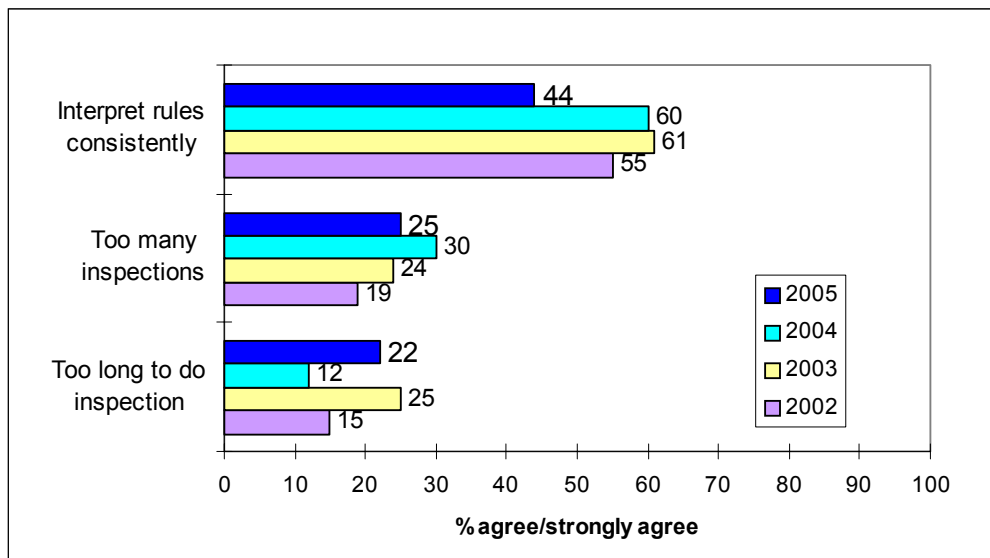
Overall, since 2004, clients in 2005 are **more likely to be dissatisfied with the time it takes to conduct inspections but more satisfied with the number of inspections:**

- There's too many inspections – agreement down 5% to 25%; and
- Staff take too long to do inspections – agreement up 10% to 22%.

Therefore, two of the three changes since 2004 have been negative in regard to staff integrity.

Integrity statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Staff interpret rules & regulations consistently	44	17	40
Too many inspections	25	14	61
Staff take too long to do inspection	22	10	67

Export Meat – Ratings of Staff Integrity – 2002 – 2005



Openness of staff and of the organisation

Respondents' ratings of the openness of AQIS staff, and of the organisation as a whole, were generally high in 2005. Clients' ratings have generally remained stable since 2004 although two of the indices of openness have improved.

Approximately 7 in 10 (or more) of respondents agreed that:

- ❖ Hours of operation reflect client needs;
- ❖ AQIS's expectations are clear; and that
- ❖ AQIS are open about how they operate.

Furthermore, approximately 4 in 5 (or more) of clients agreed that:

- ❖ AQIS listens;
- ❖ Requests for assistance are promptly dealt with; and
- ❖ They can contact AQIS when needed.

The majority of respondents (60%) also agreed that AQIS consults enough with industry.

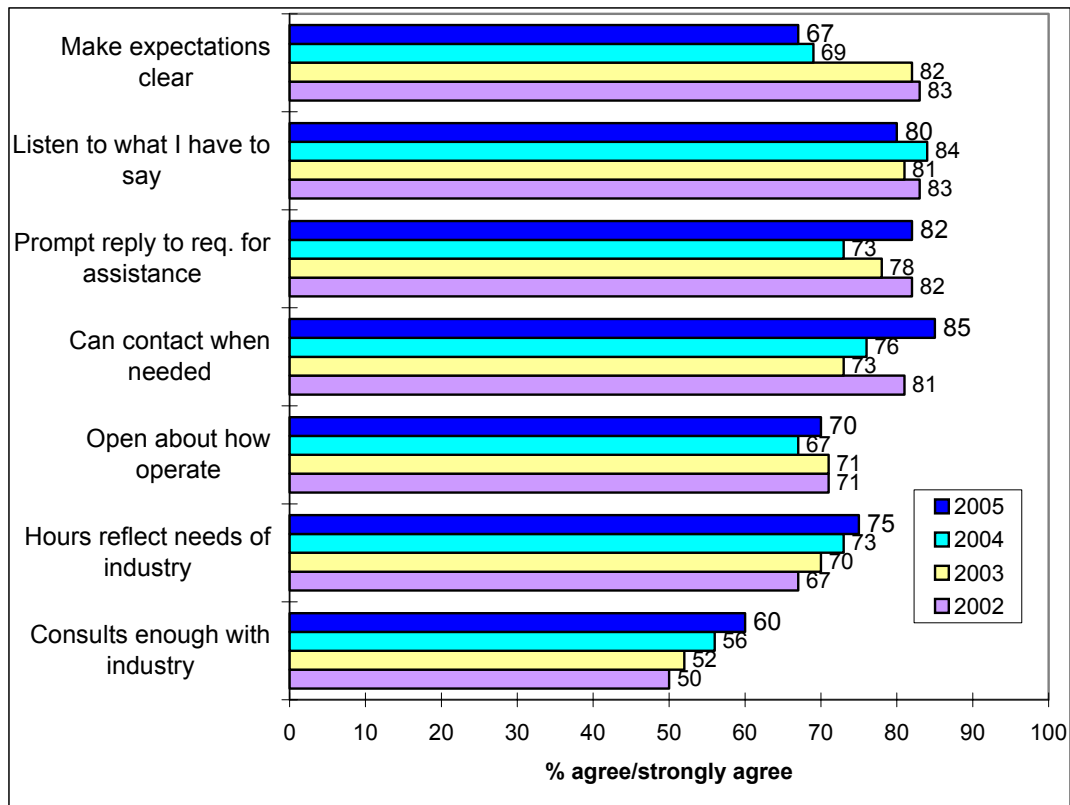
There were no significant decreases in ratings compared to 2004 but **two significant improvements are noted:**

- ❖ More clients in 2005 say that they can contact AQIS when needed (9% increase); and
- ❖ More say that AQIS responds promptly to their requests for assistance (9% increase).

Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Expectations are clear	67	13	20
Listens	80	9	11
Respond promptly to requests for assistance	82	5	12
Can contact AQIS when needed	85	4	11
Open about how they operate	70	12	18
Hours of operation reflect needs	75	5	20
Consults enough with industry	60	18	21

The area with the most room for improvement continues to be the perception concerning whether or not AQIS consults enough with industry. This has not changed significantly since 2004.

Export Meat – Ratings of Staff Openness – 2002 – 2005



Fairness of staff

Respondents’ ratings of staff fairness were average in 2005. Taking into account both the negative and positive shifts across the fairness items perceptions of fairness have remained relatively stable overall.

Approximately 3 in 5 clients or more agreed with the three positive statements:

- AQIS responds promptly to requests for information (80%);
- Makes a positive contribution to business success (65%); and
- Takes needs of business into account (57%).

While the majority of clients (57%) disagree that AQIS staff apply rules and regulations too strictly, 26% agree that rules are applied too strictly. Furthermore, almost 2 in 5 agree that AQIS *should* devote more time to assistance and less to policing/regulating. Finally, almost half the clients (46%) agree that charge rates are too high.

Overall, considering the relatively mixed opinion of Export Meat clients across a number of the statements within the fairness domain, it is clear that **there remains considerable room for AQIS to improve ratings of staff fairness.**

In comparison to 2004, the largest changes in response to individual statements include:

Positive:

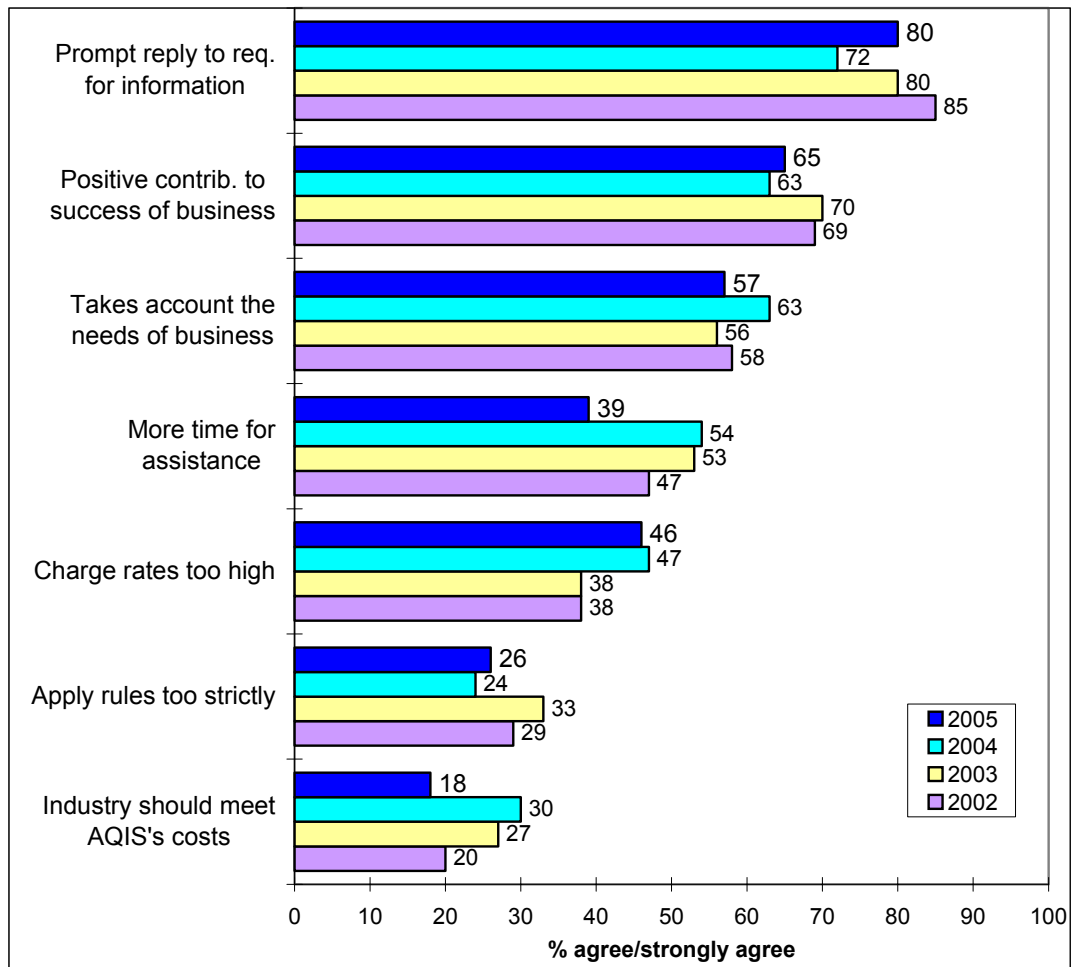
- ❖ Should devote more time to assistance/less to policing/regulating – agreement has decreased by 15% from 54% to 39%; and
- ❖ Responds promptly to request for information - agreement increased by 8% from 72% to 80%.

Negative:

- ❖ AQIS takes needs of business into account - agreement decreased by 6%; and
- ❖ Industry should meet *all* of AQIS's costs - agreement decreased by 12%.

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	80	8	12
Makes positive contribution to business success	65	18	18
Take needs of business into account	57	21	22
Should devote more time to assistance/less to policing/regulating	39	16	45
Charge rates too high	46	23	31
Staff apply rules & regulations too strictly	26	18	57
Industry should meet all of AQIS's costs	18	15	67

Export Meat – Ratings of Staff Fairness – 2002 – 2005



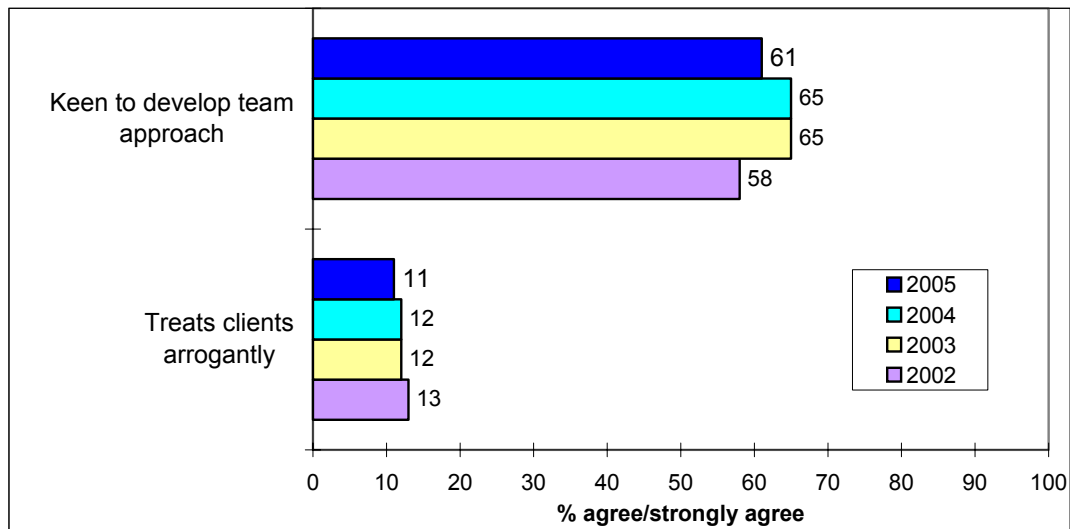
Respect

Generally, respondents were satisfied with staff respect:

- ❖ Three in four (75%) *disagreed* that AQIS staff treat their clients arrogantly. The percentage of respondents who agreed with this statement remained low (only 11%) in 2005; and
- ❖ Almost 3 in 5 (61%) of respondents also agreed that AQIS is keen to develop a team approach with the industry. This was slightly (not significantly) down on the 2004 figure.

Respect statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Keen to develop team approach	61	26	13
Treats clients arrogantly	11	14	75

Export Meat – Ratings of Staff Respect – 2002 - 2005



BROAD AQIS ISSUES

Primary role and function of AQIS

Primary role & function of AQIS	% (n = 91) 2005
Responsible for regulations	25
Facilitate/administer exports	22
Ensure compliance	15
Monitor quality of exports	10
Protect Australia from incoming pests/diseases	8
Other	5
Monitor quality of imports	4
Facilitate/administer imports	3
Don't know	2
TOTAL	100

Respondents were asked what they perceived to be the primary role and function of AQIS. The two most prominent views held by Export Meat clients were:

- Responsible for regulations (25%); and
- Facilitate/administer exports (22%).

In comparison to the spread of views reported in 2004, the perceived role and function of AQIS differed somewhat in 2005. In 2005, there was more emphasis on AQIS as a body ensuring compliance, regulation and control comparative to 2004.

Value of AQIS Label

Value of AQIS label	% (n = 91)
High value	81
Some value only	12
Low value	0
No value at all	3
Don't know/Depends	2
Not involved in exports	1
TOTAL	100

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

Of those (99%) respondents involved in exports, **94% felt that the AQIS label does add high or at least some value when it comes to accessing overseas markets – a positive result.** This proportion is 5% higher than that reported in 2004. Also, the proportion of respondents involved in exports reporting 'high value' of AQIS label increased substantially (by 12%).

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 = 91)
1 (Very poor value for money)	1
2-5	20
6-9	71
10 (Very good value for money)	8
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*).

The majority of respondents (79%) gave AQIS service a value-for-money rating of 6 or more out of ten. This is a positive result and an increase of 18% from the figure achieved in 2004 (when 61% gave a 6+ rating on value for money). Also, the average rating of value for money among Export Meat clients was 6.8 out of 10 in 2005. This is a positive result, as the rating for 2004 was 6.6.

AQIS charges changed in the last 12 months?

Changes to AQIS charges?	% (n = 91)
Decreased	4
Stayed the same	41
Increased	18
Don't know	37
TOTAL	100

The distribution of (perceived) changes to charge rates in 2005 is relatively similar to that reported in 2004. In 2004 and 2005 approximately four in ten clients reported charge rates having stayed the same. Clearly, charge rates stayed the same for most clients but increased for some 1 in 5 and decreased for very few.

The proportion reporting charges have increased in 2005 (18%) was 6% higher compared to the 2004 figure (12%) and the proportion reporting charges having decreased in 2005 (4%) was also lower than that reported in 2004 (by 11%).

A significant proportion of clients in 2003, 2004 and 2005 reported that they didn't know whether charges had changed over the last twelve months.

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Aware of AQIS Service Charter?	% (n = 91)
Yes	15
No	81
Can't say	3
TOTAL	100

Respondents were asked whether or not they were aware that AQIS has a Service Charter. Only one in six Export Meat clients (15%) was aware of the Charter in 2005. This is a decrease of 8% compared to 2004 (when 23% were aware of the Charter). Clearly, AQIS should make a more concerted effort to communicate existence of the Charter to its clients. If clients are not aware of the Charter, they are not in a position to assert their rights under the Charter.

Awareness of Service Standards in the Charter

Of those (14 Export Meat clients) that were aware of the Charter, over half (8) were aware of the actual Standards therein.

How often Service Standards are met

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

How often Service Standard met	% "Replies to your correspondence within 20 working days of receipt with an answer to your query or at least letting you know when you can expect an answer" (N = 91)	% "Answers your telephone calls or messages promptly during normal office hours" (N = 91)	% "Responds to your requests for printed information within 5 working days of receipt" (N = 91)
Always	68	57	50
Often	18	22	25
Sometimes	8	15	9
Rarely	3	5	0
Never	1	0	4
Don't know	2	0	11
TOTAL	100	100	100
Always + Often			
2003	82	77	81
2004	78	77	74
2005	86	79	75

In 2005, 3 in 4 or more Export Meat clients said that AQIS 'always' or 'often' met each of the three service standards over the past 12 months (shown in the last row of the table above). It is also of note that only 5% or fewer Export Meat clients reported that service standards were *rarely or never* met.

In summary, service standards are being met most of the time for most of the clients and in comparison to 2004 levels, the **likelihood** of AQIS either 'always' or 'often' meeting the following service standard has **increased significantly** (by 8%):

- ❖ 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.

AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin	% (n = 91)
Yes	34
No	63
Don't know	3
TOTAL	100

About 1 in 3 (34%) of Export Meat clients reported receiving the AQIS bulletin in 2005. This figure has significantly decreased (by 18%) since 2004.

Amongst those who do receive it, readership of the Bulletin is high: **74%** of those who do receive it **read every edition** and a further 10% read it every few months. Furthermore, most of those who receive it also read most of it: **68% read half or more of the Bulletin** (26% read a quarter or less of it).

Finally, **most of those who receive it (74%) judge it to be useful:**

- ❖ 16% say it is very useful; and
- ❖ 58% say somewhat useful.

About 1 in 4 (26%) feel it is 'of little use' or 'not at all useful'.

Website Visitation

Close to four in five Export Meat clients (79%) reported visiting the AQIS website. This proportion has not increased significantly since 2004.

Have you visited the AQIS website?	% (n = 91)
Yes	79
No	21
TOTAL	100

Most of those who have visited the website (74%) do so at least monthly:

- ❖ 6% visit daily;
- ❖ 29% visit weekly;
- ❖ 39% visit monthly;
- ❖ 21% visit only once or twice a year; and
- ❖ 4% only visit if they know there's something new there.

Most of those who visit the website (92%) also judge it to be useful:

- ❖ 50% say it is very useful; and
- ❖ 42% say somewhat useful.

Only 8% feel the website is of little use.

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 Export Meat clients on the AQIS website.

❖ Exporting live animals and reproductive material	31%
❖ Elmer 2.....	26%
❖ Export facilitation	12%
❖ Exporting food	8%
❖ Useful links-export	4%
❖ Import requirements.....	1%
❖ Farms for Quarantine - export.....	1%
❖ EXDOC	1%
❖ Phyto.....	1%
❖ Don't know	6%

SPECIAL INTEREST ISSUES

Awareness of Peak Organisations that consult with AQIS

More than half the clients (57%) are aware of organisations that consult with AQIS on behalf of the meat industry. Client **awareness** of Peak Industry Organisations that consult with AQIS to represent their interests **has increased significantly (by 19%) since 2004.**

Aware of Peak Industry Organisation/s?	% (n = 91)
Yes	57
No	43
TOTAL	100

Membership of Peak Industry Organisations

Of those Export Meat clients aware of Peak Industry Organisations representing their interests, three quarters (75%) are currently members of these peak bodies. This proportion is similar to that reported in 2004.

Currently a member of peak industry body?	% (n = 52)
Yes	75
No	25
TOTAL	100

CLIENT COMMENTS

Export Meat clients were given the opportunity to provide any additional comments at the end of the survey and 22% of clients (20 respondents) did so. The comments were either suggestions for improvement, criticism or praise for the current AQIS situation.

It is noted that the sample size is small and thus percentages of actual comments are not provided. For each comment, we have indicated the *number* of Export Meat clients who made each comment.

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

Additional comments made by Export Meat Clients	Number of clients making the comment (n = 20)
Need more consistency in rule interpretation	6
Helpful/responsive/easy to deal with	4
Happy/you are doing a good job	4
Work with industry/need close consultation with industry	3
Performs a necessary function/valuable service	3
Poor training of staff/need improvement of training/specialist staff	3
Unprofessional/bad customer service	3
Not enough flexibility/negative bureaucratic attitude	2
Need to improve communication/Are not informed of changes/delays etc.	2
Other (idiosyncratic/unique comments)	14
Total	44

Note: The figures in the above table add to more than 20 as respondents were able to provide more than one comment.