

THE RESEARCH

FORUM

A document prepared for
Australian Quarantine and Inspection Service

**Land-based Fish Clients
2005 Satisfaction Survey
Research Report**

Prepared by:
Dr Fadil Pedic
Jerry Goldfried

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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	17
FEES/CHARGES AND VALUE FOR MONEY	18
AQIS SERVICE CHARTER	19
AQIS INFORMATION PRODUCTS	21
SPECIAL INTEREST ISSUES.....	23
CLIENT COMMENTS	28

LAND-BASED FISH CLIENTS - 2005 SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 123 clients of AQIS Land-based Fish Client Services were contacted by telephone to participate in the Customer Satisfaction Survey in 2005. Of these, clients 102 actually participated in the survey, giving an **overall response rate of 83%**, showing that there was a very good response to the survey among Land-based Fish clients.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

Most respondents who participated in the survey were long-time clients of AQIS. Almost half (44%) had dealt with AQIS for 10 years or more. A significant proportion (21%) had dealt with AQIS for 5-9 years and only 1 in 20 (5%) had dealings with AQIS for less than 12 months.

There are no significant changes in this regard since the 2004 sample of Land-based Fish Clients was surveyed.

Length of time dealing with AQIS	2005 % (n = 102)
Less than 12 months	5
1-3 years	13
3-5 years	18
5-9 years	21
10 years or more	44
TOTAL	100¹

¹Figures 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	2005 % (n = 102)
SA – Adelaide	16
Victoria – Melbourne	16
NSW - Sydney	14
Queensland - Far North/Cairns/Townsville	13
WA – Perth	11
Queensland – Brisbane	10
Tas – Hobart	8
Canberra	6
Queensland – South Qld	6
Tas - not Hobart	4
NT – Darwin	2
NSW - not Sydney	2
SA – not Adelaide	2
WA - not Perth	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 Land-based Fish clients liaise. As expected, **the capital cities dominate** as the primary contact offices with **almost one in six of clients (16%)** dealing with the Adelaide office and Melbourne offices. Sydney and far North Queensland offices are also well presented.

OVERALL SATISFACTION

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

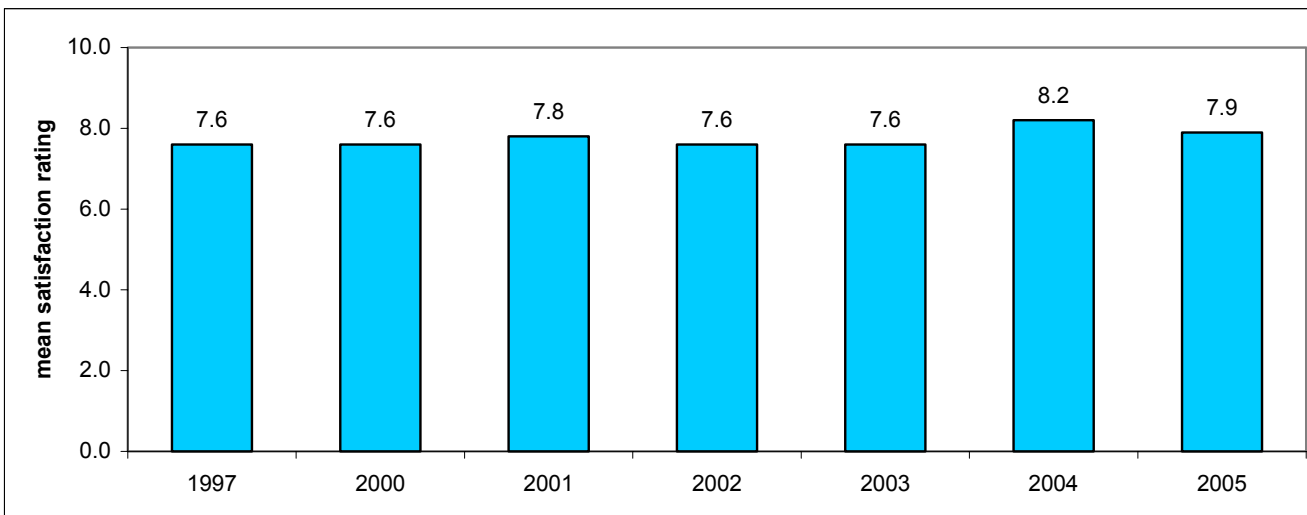
The majority of Land-based Fish clients were satisfied with the service provided to them by AQIS, with 91% giving it a rating of 6 or more out of 10. In fact, approximately 1 in 6 participants were extremely satisfied (i.e. rating of 10 out of 10). This is a very positive result.

Level of overall satisfaction with AQIS service (on a scale of 1-10)	2005 % (n = 102)
1 (Extremely Dissatisfied)	1
2-5	9
6-9	75
10 (Extremely Satisfied)	16
TOTAL	100

Respondents’ overall satisfaction with AQIS service was therefore high in 2005, with an average satisfaction rating of 7.9 out of 10. This has decreased since 2004 (when it was 8.2).

The figure below shows average overall satisfaction ratings since 1997. It indicates that overall satisfaction with AQIS service was particularly high in 2004 and is the second-highest in 2005 since measurement started.

Land-based Fish clients – Average rating of Overall Satisfaction with AQIS service: 1997-2005



Consistency in satisfaction across AQIS offices

The majority of Land-based Fish clients (91%) said that they usually deal with a single AQIS office. One in eleven (9%) 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. Five of the nine clients said that their level of satisfaction **was consistent** across different offices.

Changes in overall satisfaction over the last two years

Reflecting the level of overall satisfaction, three in five (60%) of the Land-based Fish Clients reported that their satisfaction with AQIS had stayed the same over the past two years but almost a quarter (23%) said that they were *more* satisfied now than two years ago. Only one in seven said that their overall satisfaction had deteriorated over the last 2 years (14%).

Change in overall satisfaction over last 2 years	2005 % (n = 102)
Improved	23
Stayed the same	60
Deteriorated	14
Don't Know	4
TOTAL	100

Main factors contributing to *improvement* in satisfaction

Of those (23 respondents) whose overall satisfaction had improved, this improvement was attributed to the following factors (though exact percentages are not shown due to the small sample sizes):

- ❖ Staff being more helpful;
- ❖ Staff being more approachable and better communication; and
- ❖ Staff providing a more personalised service.

Main factors contributing to *deterioration* in satisfaction

Just 14% of respondents (14 people) reported that their overall satisfaction had deteriorated over the last two years. The main reasons given for this were:

- ❖ Not enough staff/staff not available when needed;
- ❖ Don't understand business/our needs/our goals; and
- ❖ Bureaucracy/inflexible/faceless.

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	2005 % (n = 102)
None/no improvements/no changes necessary	28
Closer consultation with industry	11
Consistent rule interpretation	9
Better trained/more knowledgeable staff/specialist knowledge	7
More information/updates	7
More staff	6
More flexible/understanding	6
Reduce fees/improve value for money	5
Adopt a team approach/work with us	4
More accessible/contactable	3
Better access to information/updates	2
More efficient/faster processing	2
Better access to information/updates	2
Improve understanding of business/my business	1
More automated quarantine entry processing	1
Don't know	10
Other	9

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

The table above shows that about 1 in 10 clients made the following suggestions for improvement:

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

It should also be noted that more than a quarter of respondents (28%) 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.

According to respondents, the most important attributes of AQIS service are staff professionalism, clear expectations, understanding needs of business, and being responsive to clients' needs. These attributes all had average importance ratings of 8.6 and above (out of 10). Respondents not only thought that these attributes were important, but were also **generally satisfied with these aspects of AQIS service.** Average satisfaction ratings for these four important areas of service ranged from 7.2 (understanding needs of business) to 8.0 (staff professionalism) This shows that **AQIS is generally meeting the needs of this client group, by delivering on the aspects of service that are most important to these clients.**

Other important attributes (which were rated 8 or more out of 10) include:

- ❖ Staff technical competence;
- ❖ Flexibility; and
- ❖ Adopting a team approach.

AQIS performed well on these three attributes also, with average satisfaction ratings ranging from 7.0 to 7.5.

In summary, AQIS is generally meeting the needs of this client group but there is room to improve satisfaction levels.

Attribute of AQIS service	Average rating - Satisfaction	Average rating - Importance	Average rating Satisfaction x Importance
Staff professionalism	8.0	8.8	70
Expectations are clear	7.6	8.8	67
Understand needs of business	7.2	8.7	63
Responsive to needs	7.6	8.6	65
Flexible	7.2	8.5	61
Adopting team approach	7.0	8.3	58
Staff technical competence	7.5	8.2	62
Timely & accurate invoices	7.7	7.6	59
Value for money	6.5	7.5	49

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:

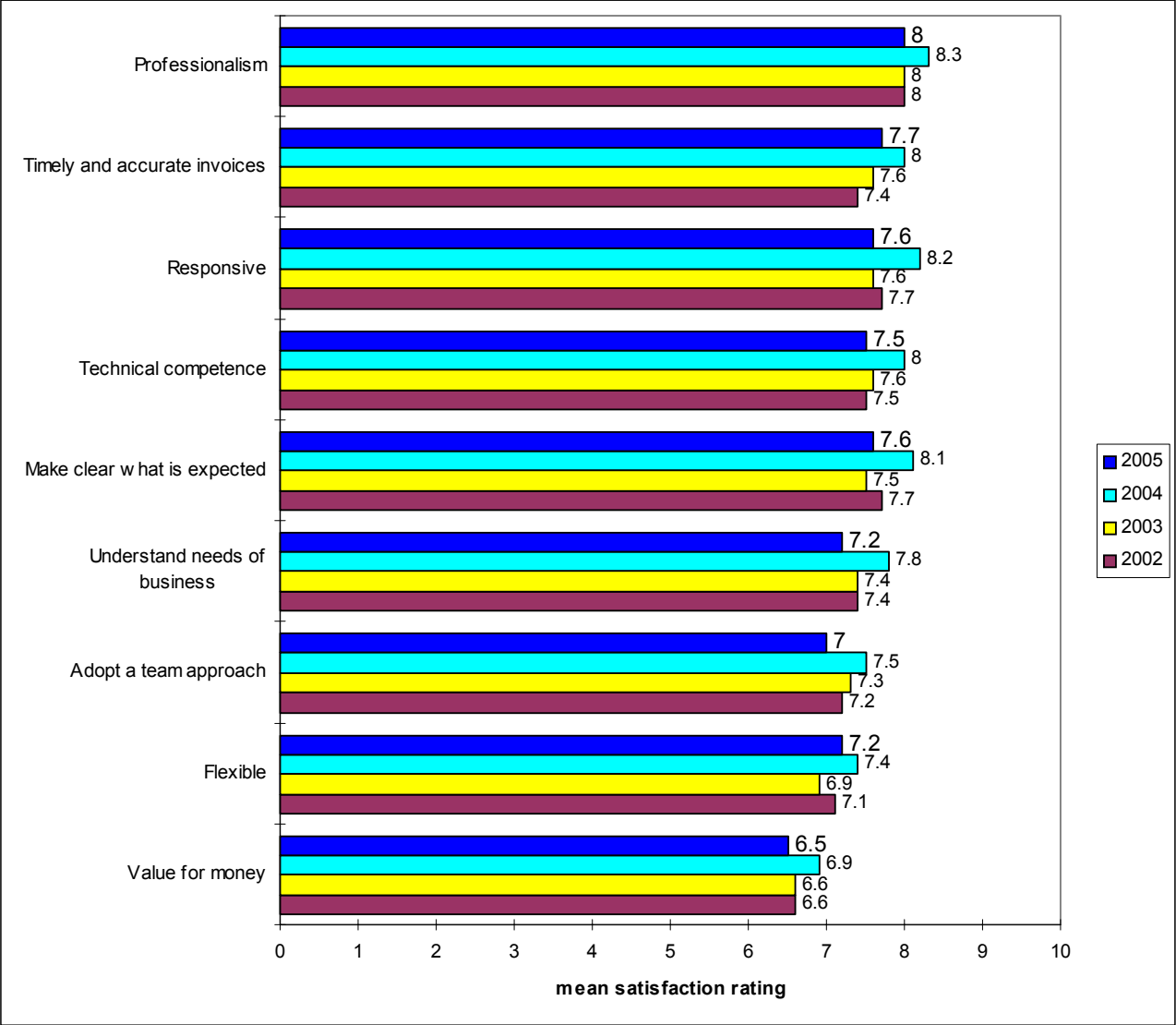
- ◇ **1** (extremely dissatisfied with an attribute that is not at all important) to
- ◇ **100** (extremely satisfied with an attribute that is extremely important).

For Land-based Fish clients, these final 'satisfaction x importance' scores range from 49 for 'value for money', to 70 for 'Staff professionalism. Therefore, satisfaction is generally high, with most 'product' scores being greater than 50. Value for money is the one exception where the score falls just below 50.

Comparisons with historical data are shown in the figure below. **Land-based Fish Clients' satisfaction with AQIS service has deteriorated on all attributes since 2004.** This contrasts quite starkly with the 2003-2004 change which showed a marked improvement in client satisfaction across all service attributes.

As shown in the figure overleaf, the decline in satisfaction since 2004 was most noticeable in the areas of clarity of AQIS's expectations, AQIS understanding the needs of business, AQIS being responsive to needs and AQIS staff technical competence.

Land based Fish 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

Staff professionalism in 2005, was rated highly by Land-based Fish clients.

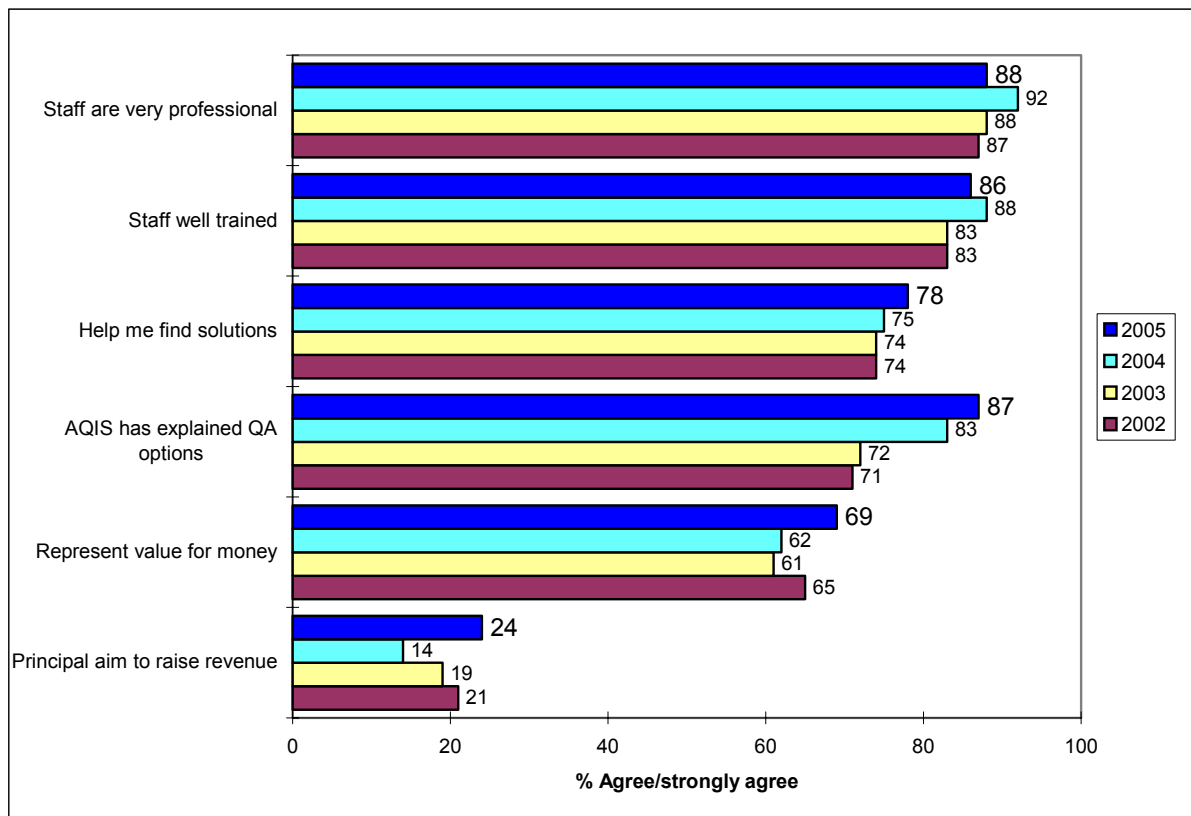
- ❖ Almost 9 in 10 Land-based Fish clients agreed that AQIS staff are professional (88%) and well trained (86%);
- ❖ Almost 9 in 10 also agreed that AQIS staff adequately explained QA/CA/Co-reg options to them (87%).

Furthermore, 4 in 5 agreed that AQIS staff helps them find solutions (78%). Two thirds (69%) of clients agreed that the tasks AQIS performs are value for money.

Finally, almost 1 in 4 respondents (24%) felt that the main aim of AQIS is to raise revenue.

Professionalism statements	2005 % Agree/ Strongly Agree	2005 % Neither/ Don't know	2005 % Disagree/ Strongly Disagree
Staff are very professional	88	9	3
Staff well trained	86	5	9
Helps me find solutions	78	7	15
Adequately explained QA/CA/Co-reg options	87	7	6
Tasks AQIS performs are value for money	69	12	20
Aim of AQIS is to raise revenue	24	12	64

Land-based Fish clients – Ratings of Staff Professionalism – 2002 - 2005



In comparison to 2004, ratings of staff professionalism have generally improved. **Two significant increases in the proportion of respondents agreeing with positive statements are noted** (and can be viewed in the figure above):

- ❖ Staff adequately explained QA/CA/Co-reg options - increased by 4%; and
- ❖ AQIS's tasks represent value for money – up by 7%.

Rating of staff professional has however declined (by 4%) whilst the largest move has been more Land-based Fish Clients saying that the main of AQIS is to raise revenue (up by 10%).

Integrity of staff

Land-based Fish Clients' ratings of staff integrity were high in 2005 but lower than in 2004. The majority of respondents felt that:

- ❖ Staff *do not* take too long to conduct inspections (84%);
- ❖ AQIS *does not* conduct too many inspections (67%); and
- ❖ AQIS staff interpret rules and regulations consistently (72%).

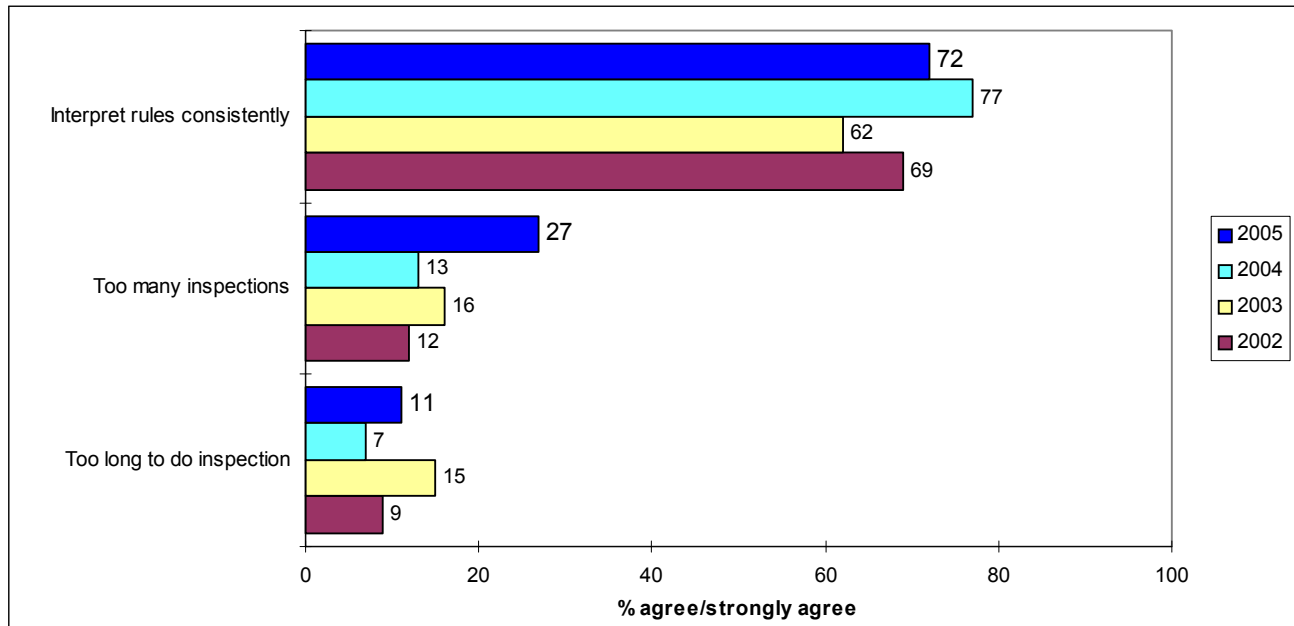
Respondents' views on the attributes of staff integrity deteriorated since 2004:

- Agreement that staff *do* interpret rules & regulations *decreased* by 5%;
- Agreement that AQIS *does* undertake too many inspections more than doubled (from 13% to 27%); and
- Agreement that staff *do* take too long to do inspections increased by 4%.

These changes indicate a significant negative change in the perception of staff integrity since 2004, as shown in the figure overleaf.

Integrity statements	% Agree/ Strongly Agree		% Neither/ Don't know		% Disagree/ Strongly Disagree	
Staff interpret rules & regulations consistently	72		7		21	
Too many inspections	27		6		67	
Staff take too long to do inspection	11		5		84	

Land-based Fish clients – Ratings of *Staff Integrity* – 2002-2005



Openness of staff and of the organisation

Satisfaction with openness of AQIS staff and of the organisation as a whole was generally high in 2005 though lower than in 2004. Eight in 10 or more clients feel that:

- AQIS responds promptly to requests for assistance;
 - They can contact AQIS when needed;
 - AQIS is open about how it operates;
 - AQIS's expectations are clear'; and
 - AQIS listens to them.
- ❖ Further, 7 in 10 clients feel that AQIS's hours of operation reflect industry needs.

Almost two in three clients agree that AQIS consults enough with industry while one in five disagrees with this view.

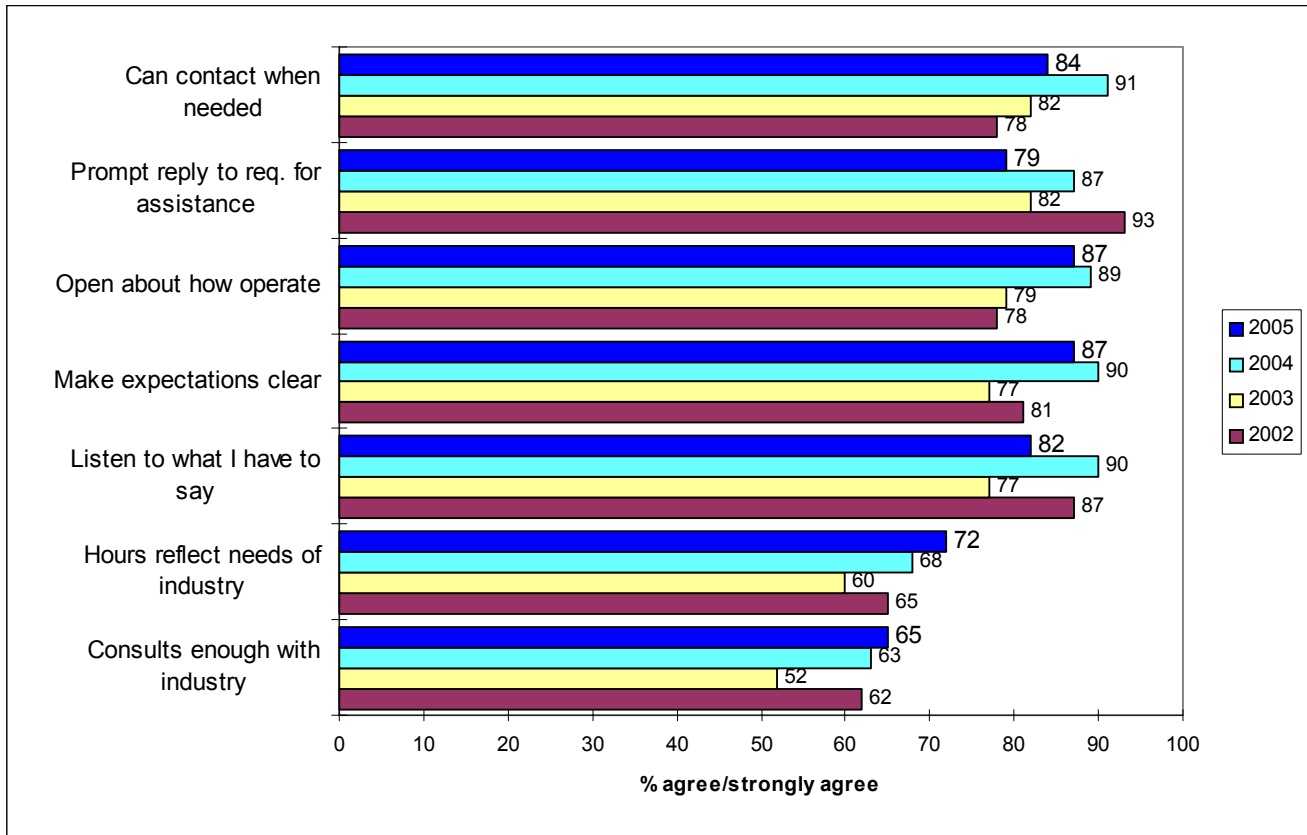
However, since 2004, decreases of between 7% and 8% are noted on three openness indices:

- X Responds promptly to assistance requests – down 8%;
- X Can contact AQIS when needed – down 7%; and
- X AQIS listens – down 8%.

The figure overleaf illustrates these changes.

Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Respond promptly to req. for assistance	79	10	11
Can contact AQIS when needed	84	6	10
Open about how they operate	87	5	8
Expectations are clear	87	7	6
Listens	82	9	9
Hours of operation reflect needs	72	7	21
Consults enough with industry	65	14	21

Land-based Fish Clients – Ratings of Staff Openness – 2002 – 2005



Fairness of staff

Land-based Fish Clients rated staff fairness moderately in 2005.

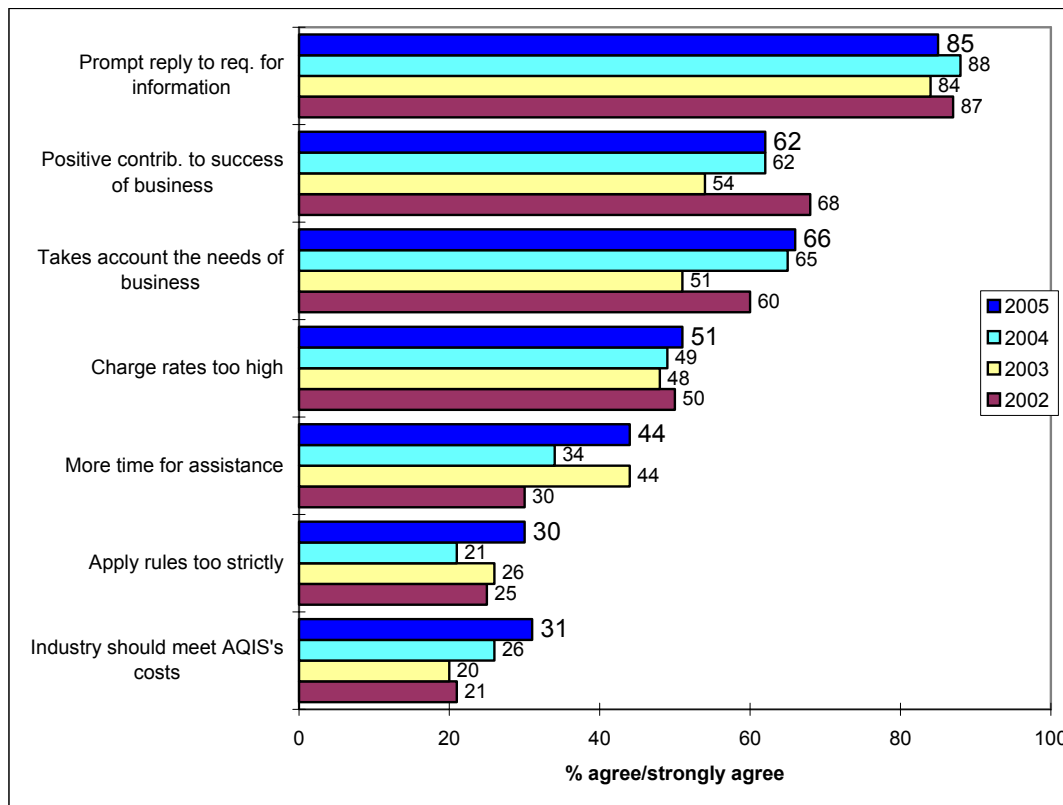
While almost 9 in 10 (85%) felt that AQIS responds promptly to requests for information, somewhat fewer - two in three - agreed that AQIS staff make a positive contribution to their business success and take the needs of their business into account. Furthermore, half the Land-based Fish Clients felt that AQIS charge rates are too high.

Relative to 2004, there were **two notable negative changes** (from seven attributes) **in ratings of staff fairness**, indicating decreases in positive perceptions of staff fairness noted in 2004. These decreases are illustrated on the next page.

In short, 10% more clients now feel that the policing/regulating role of AQIS needs to be re-balanced toward assistance whilst 9% more clients say that staff apply rules and regulations too strictly.

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	85	3	12
Makes positive contribution to business success	63	17	20
Take needs of business into account	66	13	20
Charge rates too high	51	13	36
Should devote more time to assistance/less to policing/regulating	44	13	42
Staff apply rules & regulations too strictly	30	16	54

Land-based Fish clients – Ratings of Staff Fairness – 2002 – 2005



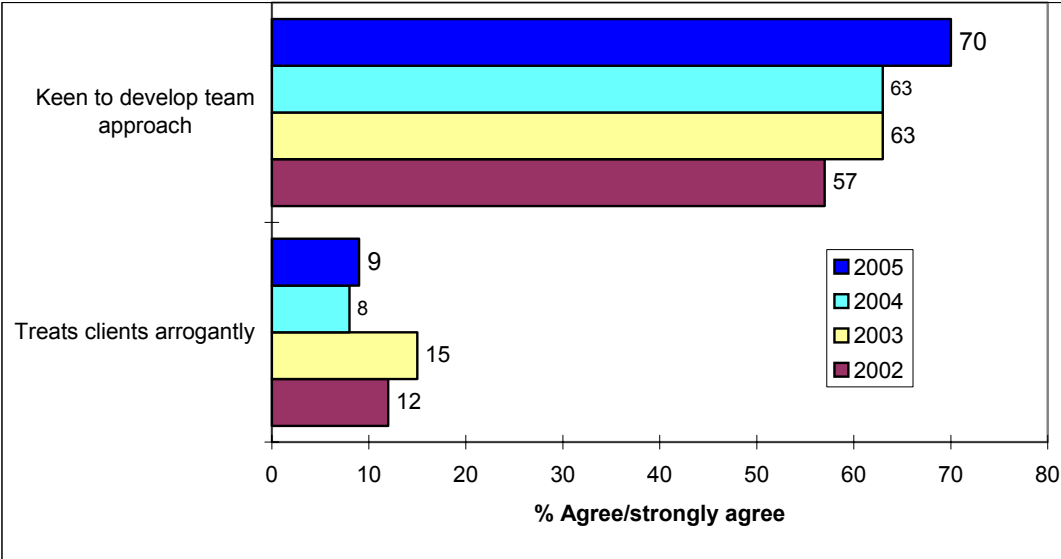
Respect

Clients generally had very positive views on respect shown to them by AQIS staff. Seven in ten clients agreed that AQIS staff are keen to develop a team approach in working with them. This index of respect has in fact increased by 7% since 2004.

Similarly, as in 2004, fewer than 1 in 10 Land-based Fish Clients agreed that AQIS staff treat their clients arrogantly.

Respect Statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Keen to develop team approach	70	14	16
Treats clients arrogantly	9	4	87

Land-Based Fish clients – Ratings of Staff Respect – 2002 - 2005



BROAD AQIS ISSUES

Primary role and function of AQIS

Respondents were asked what they perceive to be the primary role and function of AQIS. The predominant view, that AQIS's main role is to monitor export quality, is maintained since 2003. However, the emphasis on AQIS as protecting Australia from pests/diseases has increased 9% (14% in 2004) and the emphasis on AQIS as a *regulating* body has declined 12% (from 18% in 2003).

Primary role & function of AQIS	% (n = 102)
Monitor quality of exports	25
Protect Australia from incoming pests/diseases	23
Ensure compliance	18
Facilitate/administer exports	14
Monitor quality of imports	9
Responsible for regulations	6
Don't Know	2
Facilitate/administer imports	2
Represent Australia's interests overseas	2
TOTAL	100

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?" Most clients (93%) were involved in exports, and of these **80% felt that the AQIS label does add high or at least some value when it comes to accessing overseas markets** (i.e., 74% of the 93% involved in exports = 80%). This figure has not changed significantly since 2004.

Value of AQIS label	% (n = 102)
High value	53
Some value only	21
Low value	7
No value at all	9
Don't know/Depends	4
Not involved in exports	7
TOTAL	100

FEES/CHARGES AND VALUE FOR MONEY

Rating value for money of AQIS services

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

Rating of value for money (on a scale of 1 – 10)	% (n = 102)
1 (Very poor value for money)	5
2-5	33
6-9	52
10 (Very good value for money)	10
TOTAL	100

Just over 3 in 5 respondents (62%) gave AQIS service value for money a rating of 6 or higher out of 10. **The average rating of value for money among Land-Based Fish Clients in 2005 was 6.3 out of 10. This is a good result, towards “good value for money”.** In 2004, the average rating of value for money among Land-Based Fish clients was 6.5, **showing no overall significant change in perceptions of value for money.**

Changes to AQIS charges over the last 12 months

Changes to AQIS charges?	% (n = 102)
Decreased	6
Stayed the same	32
Increased	28
Don't know	33
Both increased and decreased	1
TOTAL	100

It is interesting that no change in perceived value for money of AQIS services has taken place because this is in the context of what some clients see as increasing charges! While 38% report stagnant or decreasing charges more than a quarter (28%) report their charges have risen. Despite this increase in charges for some, perception of value for money has stayed constant, implying that **the value clients place on AQIS services has actually risen slightly.**

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Aware of AQIS Service Charter?	% (n = 102)
Yes	18
No	80
Don't know	2
TOTAL	100

Respondents were asked whether or not they were aware that AQIS has a Service Charter. Fewer than one in five Land-Based Fish clients (18%) were aware of the Charter in 2005. This has **decreased by 12% since 2004** (when it was 30%).

Awareness of Service Standards in the Charter

Of those (18 Land-Based Fish Clients) that were aware of the Charter, half 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.

In 2005, three in four or more Land-Based Fish Clients said that AQIS 'always' or 'often' meets all three service standards (as shown in the last row of the table below).

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 = 102)	% "Answers your telephone calls or messages promptly during normal office hours" (N = 102)	% "Responds to your requests for printed information within 5 working days of receipt" (N = 102)
Always	71	61	52
Often	14	26	24
Sometimes	5	10	10
Rarely	6	1	4
Don't know	5	3	10
Never	-	-	1
Total	100	100	100
Always + Often			
2002	87	85	84
2003	88	84	78
2004	92	92	86
2005	85	87	76

In comparison with 2004 findings, **2005 findings show declines in meeting of all three service standards:**

- There was a 7% decrease in likelihood of meeting the standard regarding replying to correspondence;
- There was a 5% decrease in likelihood of meeting the standard regarding answering phone calls; and
- There was a 10% decrease in likelihood of meeting the standard regarding responding to requests for printed information.

That said, overall service standards are being met most of the time for most of the clients. This is consistent with two earlier findings of this report, showing that the *majority* of respondents agreed that AQIS staff:

- ❖ Respond promptly to requests for information (in the 'staff fairness' factor); and
- ❖ Respond promptly to requests for assistance (in the 'staff openness' factor).

AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin	% (n = 102)
Yes	47
No	50
Don't know	3
TOTAL	100

Almost half (47%) of Land-Based Fish Clients reported receiving the AQIS bulletin in 2005. This has not changed significantly since the previous survey.

Amongst those who do receive it, readership of the Bulletin is moderate: **58%** of those who do receive it **read every edition** and a further 30% read it every few months. Furthermore, most of those who receive it also read most of it: **66% read half or more of the Bulletin** (only 19% read a quarter or less of it).

Finally, **most of those who receive it (81%) judge it to be useful:**

- ❖ 23% say it is very useful; and
- ❖ 58% 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

Slightly more than half of Land-based Fish Clients (53%) reported visiting the AQIS website, an increase of only 4% since the 2004 survey (and 8% since 2003).

Have you visited the AQIS website	% (n = 102)
Yes	53
No	47
TOTAL	100

Over half of those who have visited the website (48%) do so at least monthly:

- ❖ 9% visit weekly;
- ❖ 39% visit monthly;
- ❖ 44% visit only once or twice a year;
- ❖ 2% visit every two years; and
- ❖ 6% visit only if they know there is something new on the website.

Most of those who visit the website (81%) judge it to be useful:

- ❖ 23% say it is very useful; and
- ❖ 58% say somewhat useful.

Only 15% feel the website is of little use while 2% judge 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 Land-based Fish Clients on the AQIS website.

❖ Exporting fish and fish products	24
❖ Import requirements.....	11
❖ Export facilitation	7
❖ Useful links: Export	6
❖ EXDOC	4
❖ Farms for quarantine	4
❖ Awards.....	4
❖ Food.....	4
❖ Icon.....	2
❖ Dairy	2
❖ Exporting live animals and reproductive material (inc. pets)	2
❖ Fees and charges: Export	2
❖ Other	12
❖ Unsure/don't know	11

Clearly, as expected, exporting fish and fish products, import requirements and export facilitation are three popular areas on the website for this client group.

SPECIAL INTEREST ISSUES

Awareness of Peak Organisations that consult with AQIS

In comparison to 2004, awareness of Peak Industry Organisations that consult with AQIS to represent their interests is stable. In 2004, 32% of Land-based Fish clients were aware of Peak Industry Organisations compared to 31% in 2005.

Awareness of Peak Industry Organisations	% (n = 102)
Yes	31
No	67
Can't say	21
TOTAL	100

Membership of Peak Industry Organisations

Of those Land-based Fish Clients who are aware of Peak Industry Organisations representing their interests, slightly more than half (53%) are currently members of this peak body, a decrease of 9% from the 2004 survey (62%).

Currently a member of peak industry body	% (n = 32)
Yes	53
No	47
TOTAL	100

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. **Two in three (68%) reported that they have a quality assurance arrangement**, a decrease of 10% since 2004 when 78% reported having a QA arrangement (and a decrease of 19% since 2003). Conversely, the proportion of those who have an end-product inspection system in place increased from 13% in 2003, to 22% in 2004 and 32% in 2005.

QA arrangement or End-product Inspection system in place	% (n = 102)
QA	68
End-product or Neither	32
TOTAL	100

Type of QA arrangement

Of those (69 clients) who have a QA system in place, the majority (59%) have a Food Processing Accreditation (FPA) system, followed by 13% who have the Approved Quality Assurance (AQA) system and 4% who use an approved certifying organisation. No significant changes are noted in this regard since 2003.

Type of QA arrangement	% (n = 69)
Food Processing Accreditation (FPA)	60
Approved Quality Assurance	13
Approved certifying organisation	4
Other	19
Don't know	4
Total	100

QA system audit

Respondents who have a QA system in place were asked who audits their system. The vast majority (90%) reported that they are audited by AQIS. This figure had decreased by 6% since 2004.

Who audits QA system	% (n = 69)
AQIS	90
Other accredited body	6
Don't know	4
TOTAL	100

Satisfaction with auditors of QA system

These respondents 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. **As AQIS is the primary auditing body for these clients, this is a very good result.**

Satisfaction with auditors of QA system	% (n = 69)
Very satisfied	58
Satisfied	28
Don't know	1
Dissatisfied	3
Neither satisfied nor dissatisfied	10
TOTAL	100

AQIS's role in clients' QA arrangement

Clients who have an AQIS approved QA system in place were asked:

- i. whether they felt that AQIS was helpful in developing their QA system;
and
- ii. whether they felt that AQIS is very knowledgeable about QA systems.

As shown in the table below, the majority of responses to both of these items were generally positive. Four in five clients felt that **AQIS was both**

- ❖ **very helpful** in the development of their QA/CA or co-regulation system; and
- ❖ **very knowledgeable** about QA/CA or Co-regulation systems.

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	82	12	6
AQIS is very knowledgeable about QA/CA or Co-regulation systems	80	11	9

Improvements to the QA/CA/Co-reg system

The table below shows that **the vast majority of clients (83%) with AQIS approved QA/CA/Co-reg systems believe the QA/CA/Co-reg system is working well.** However, this represents a decline in satisfaction with the system since 2004 when 89% agreed that it was working well.

Is the Co-regulation/Quality Assurance/ Compliance system working well?	% (n = 69)
Yes	83
No	17
TOTAL	100

Land-based Fish Clients were also asked what improvements could be made to the system. Almost two in five (38%) of clients reported that they could think of **no improvements** to the QA/CA/Co-reg system.

Only two suggestions were put forward by more than 10% of clients: simplify the system and work more closely with industry.

Improvements to QA/CA/Co-reg systems	% (N = 69)
None/nothing needs changing	38
System needs to be simplified	12
AQIS needs to work more closely with industry	10
System should cost less	6
AQIS needs to increase its presence	2
Training process needs review	1
Other (individual comments)	17
Don't know	16

Using AQIS to clear shipments

The table below shows that only 20% of Land-based Fish Clients used AQIS to clear shipments.

Used AQIS to clear shipments?	% (n = 102)
Yes	20
No	80
TOTAL	100

Satisfaction with this clearing service	% (n = 20)
1 (Extremely Dissatisfied)	-
2-5	10
6-9	50
10 (Extremely Satisfied)	40
TOTAL	100

The vast majority of those who used this service, 15 of the 20 clients, rated their level of satisfaction with AQIS very highly (i.e., provided a satisfaction rating of 8 or more out of 10).

CLIENT COMMENTS

Land-based Fish Clients were given the opportunity to provide any additional comments at the end of the survey and **only 30% of clients** (31 respondents) did so. The 60 comments these clients made 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 presented in the table below only the raw numbers.

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 Land-based Fish Clients have been examined. More than 2 from 5 comments are positive.

Additional comments made by Land-based Fish Clients	No. of Clients (n = 31)
<i>Happy/doing a good job</i>	12
More staff/more regional staff	7
Consistent rule interpretation/need more consistency	6
<i>Helpful/responsive/easy to deal with</i>	5
Poor training of staff/need specialist staff	4
<i>Performs a necessary function/valuable service</i>	4
Need to improve communication/not informed of changes	3
<i>Professional</i>	3
Not enough flexibility/negative attitude/Over-regulated	2
Unprofessional/bad customer service	2
Work with us/ work with industry/ closer consult with industry	2
More/better guidelines – less confusing guidelines	2
More flexible hours/contactable outside business hours	2
Need to work in partnership/now act more like police	2
<i>Good service / excellent customer service</i>	2
Improve electronic information/improve computer systems	1
More accessible staff/required when needed/ instead of machine	1
Still room to improve	1