

THE RESEARCH

FORUM

A document prepared for
Australian Quarantine and Inspection Service

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

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VESSEL-BASED FISH CLIENTS - 2005 SATISFACTION SURVEY FINDINGS

SURVEY SAMPLE

In total, 140 clients of AQIS Vessel-based Fish Client Services were contacted by telephone to participate in the Client Satisfaction Survey in 2005. Of these, 102 clients actually participated in the survey, giving an **overall response rate of 73%**. **This is a good response rate**, and represents an improvement on the previous survey (2004), which achieved a response rate of 68%.

SAMPLE CHARACTERISTICS

Length of time dealing with AQIS

Most respondents who participated in the survey were long-time clients of AQIS. The majority (58%) had dealt with AQIS for 10 years or more. A significant proportion, one quarter (25%), also said that they had dealt with AQIS for 5-9 years. This has not changed significantly since the previous survey (2004).

Length of time dealing with AQIS	2005 % (n = 102)
Less than 12 months	1
1-3 years	8
3-5 years	8
5-9 years	25
10 years or more	58
TOTAL	100

Regular AQIS contact office

Regular contact office	2005 % (n = 102)
Queensland – Far North/Cairns/Townsville	40
Queensland – Brisbane	20
Queensland – South Qld – not Brisbane	17
SA – Adelaide	12
WA – Perth	11
Canberra	6
NT – Darwin	6
SA- not Adelaide	3
NSW - not Sydney	2
NSW - Sydney	1
Tasmania – Hobart	1
Victoria – Melbourne	1
Total	120

Note: The total adds to more than 100% as clients could specify more than one office.

The table above shows the main AQIS office with which Vessel-based Fish clients liaise. Queensland offices dominate as the main points of contact for these clients, with 40% dealing with the Far North Queensland office. This has not changed significantly since 2004 (41%).

Approximately one in eight Vessel-based Fish clients (12%) also said they dealt with the Adelaide office, this proportion has increased from 7% in 2004.

Consistency in satisfaction across AQIS offices

The majority of Vessel-based Fish clients (83%) indicated that they usually deal with only one AQIS office. Only 17 clients 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, levels of satisfaction **are consistent** across different offices (though the exact percentage is not reported due to the small sample size).

OVERALL SATISFACTION

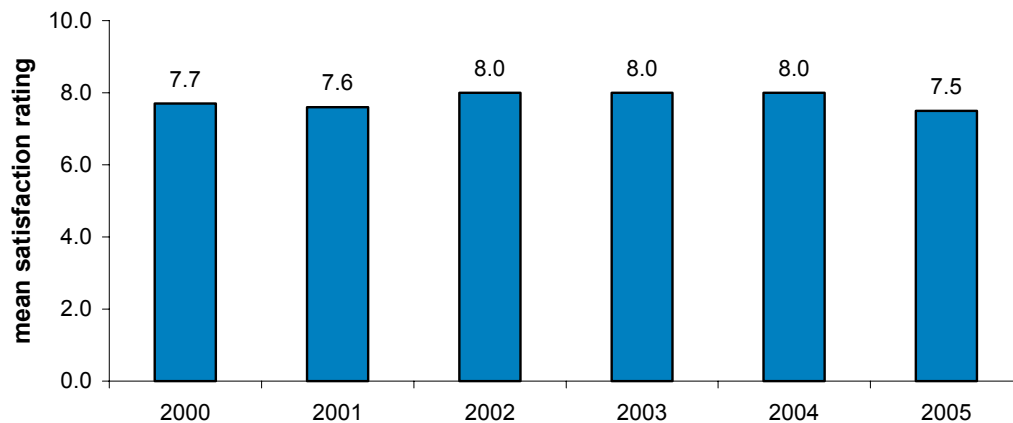
Respondents were asked to rate their overall satisfaction with the service provided by AQIS on a scale of 1 to 10 – 1 being ‘extremely dissatisfied’, and 10 being ‘extremely satisfied’.

The vast majority of Vessel-based Fish clients were satisfied with the service provided to them by AQIS, with 80% rating it 6 or more out of 10. Of these, 22% of respondents reported being *extremely satisfied* with AQIS service. While this is a positive result, it has decreased since the 2004 survey when 90% of Vessel-based Fish clients rated overall satisfaction 6 or more out of 10.

Level of overall satisfaction with AQIS service (on a scale of 1-10)	2005 % (n = 102)
1 (Extremely Dissatisfied)	2
2-5	19
6-9	58
10 (Extremely Satisfied)	22
TOTAL	100 ¹

Respondents’ overall average satisfaction rating in 2005 was 7.5 (out of 10). While being a healthy overall satisfaction score, the 2005 figure is considerably lower than the figure recorded in 2004 (8.0 out of 10, as shown in the figure below).

Vessel-based Fish clients – Average rating of Overall Satisfaction with AQIS Service: 2000-2005



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.

Changes in overall satisfaction over the last two years

The largest proportion of Vessel-based Fish clients (almost two thirds - 65%), said that they were as satisfied now as they were two years ago. Approximately equal proportions said that their overall satisfaction had improved (16%) and deteriorated (14%) respectively.

These results are similar to those reported in 2004 but have deteriorated slightly. In 2005, slightly fewer clients reported improved satisfaction (16% in 2005 vs. 19% in 2004) and slightly more clients reported deterioration in satisfaction (14% in 2005 vs. 10% in 2004).

Change in overall satisfaction over last 2 years	2005 % (n = 102)
Improved	16
Stayed the same	65
Deteriorated	14
Don't know	6
TOTAL	101

Main factors contributing to *improvement* in overall satisfaction

Of those (16 respondents) whose overall satisfaction had *improved*, this improvement was attributed to two main factors as in 2004 (though exact percentages are not shown due to the small sample sizes):

- ❖ Staff being more approachable and communicating better with clients; and
- ❖ Staff making more of an effort to contact clients, demonstrating personalised service and developing working relationships with clients.

Main factors contributing to *deterioration* in overall satisfaction

Of those (14 respondents) whose overall satisfaction had deteriorated, the primary reason for this deterioration was the issue of a *bureaucratic or inflexible approach of staff* (though, again, the exact percentage is not shown 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 are shown in the table below.

Suggested changes to improve service	2005 % (n = 102)
None/No improvements/no changes necessary	28
Reduce fees/improve value for money	16
Closer consultation with industry	11
More flexible/understanding	10
Improve understanding of business/my business	10
Consistent Rule Interpretation	10
More staff	6
Better access to information/updates	5
More information/updates	4
More automated quarantine entry processing	4
Adopt a team approach/work with us	3
More efficient/ faster processing	3
More accessible/ contactable	2
Better trained/ more knowledgeable staff/ specialist knowledge	5
Don't know	12
Other	5

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

The main suggestions for improvement noted by 1 in 10 or more clients concerned:

- Reducing fees and or improving value for money (noted by 1 in 6 in 2005 and consistent with last years figure);

- Having closer consultation with industry (noted by 1 in 10 in 2005 and increased in comparison to 2004 figures by approximately 10%);
- Being more flexible and understanding (as per above);
- Improving the understanding of clients' business (as per above); and
- Increasing the consistency in AQIS staff rule interpretation (as per above).

On a positive note - approximately three from ten (28%) Vessel-based Fish clients felt that AQIS does *not* need to make any changes to improve services (note - this figure has decreased by 11% since 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 clients, the most important attribute of AQIS service was **staff professionalism**. This attribute achieved an average importance rating of 8.7 (out of 10). Respondents not only thought that this attribute was most important, but were also most satisfied with this aspect of service. The average satisfaction rating for staff professionalism was 8.0 (out of 10).

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

- ❖ Understanding needs of business;
- ❖ Providing timely & accurate invoices;
- ❖ Making expectations are clear;
- ❖ Being flexible;
- ❖ Being responsive to needs; and
- ❖ Staff technical competence

AQIS also performed very well on all these attributes, with average satisfaction ratings ranging from 7.0 to 7.8. This means that the **AQIS Vessel-based Fish client service area is 'on track' – 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	8.7	70
Understand needs of business	7.0	8.2	57
Timely & accurate invoices	7.8	8.2	64
Expectations are clear	7.3	8.1	59
Responsive to needs	7.5	8.1	61
Flexible	7.3	8.1	59
Staff technical competence	7.4	8.0	59
Adopting team approach	7.0	7.5	53
Value for money	6.2	7.3	45

The last column in the table above provides an average 'product' score – that is, the average of all satisfaction scores multiplied by all importance scores. 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 Vessel-based Fish clients, these final 'satisfaction x importance' scores range from 45 for 'Value for money' to 70 for 'Staff professionalism'. Thus **satisfaction with AQIS services is generally moderate to high** – all 'product' scores are greater than 50 with the exception of value for money which is not that far behind and performing reasonably well considering its low importance rank.

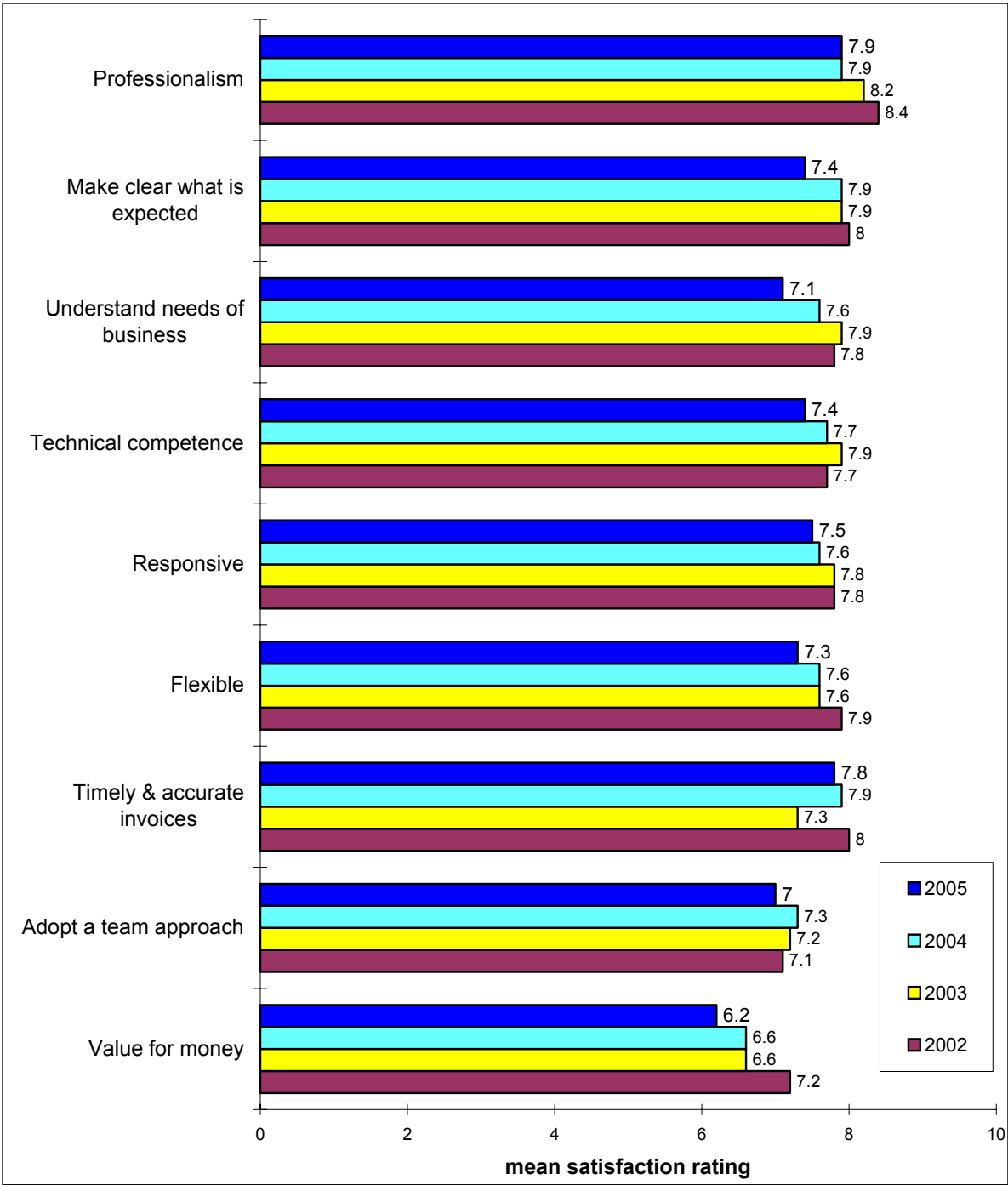
Comparisons with historical data are shown in the figure below. The data show that while satisfaction remained relatively high in 2005, **client satisfaction has generally decreased slightly yet consistently for 8 of the 9 service attributes.**

The main decreases in 2005 compared to 2004 (while not statistically significant) concerned:

- AQIS making their expectations clear – decreased by .5 of a point;
- Understanding the needs of clients' business – decreased by .5 of a point; and
- Value for money – decreased by .4 of a point.

These results show a slight downward trend in satisfaction in areas of AQIS service.

**Vessel-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:

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

In 2005, the vast majority of Vessel-based fish clients agreed that AQIS staff are professional in dealing with clients and are well trained. Slightly over nine in ten Vessel based fish clients agree that AQIS staff are professional (92%) and that staff are well trained (90%). Client satisfaction did not change significantly with regards to these two aspects of professionalism since the previous survey.

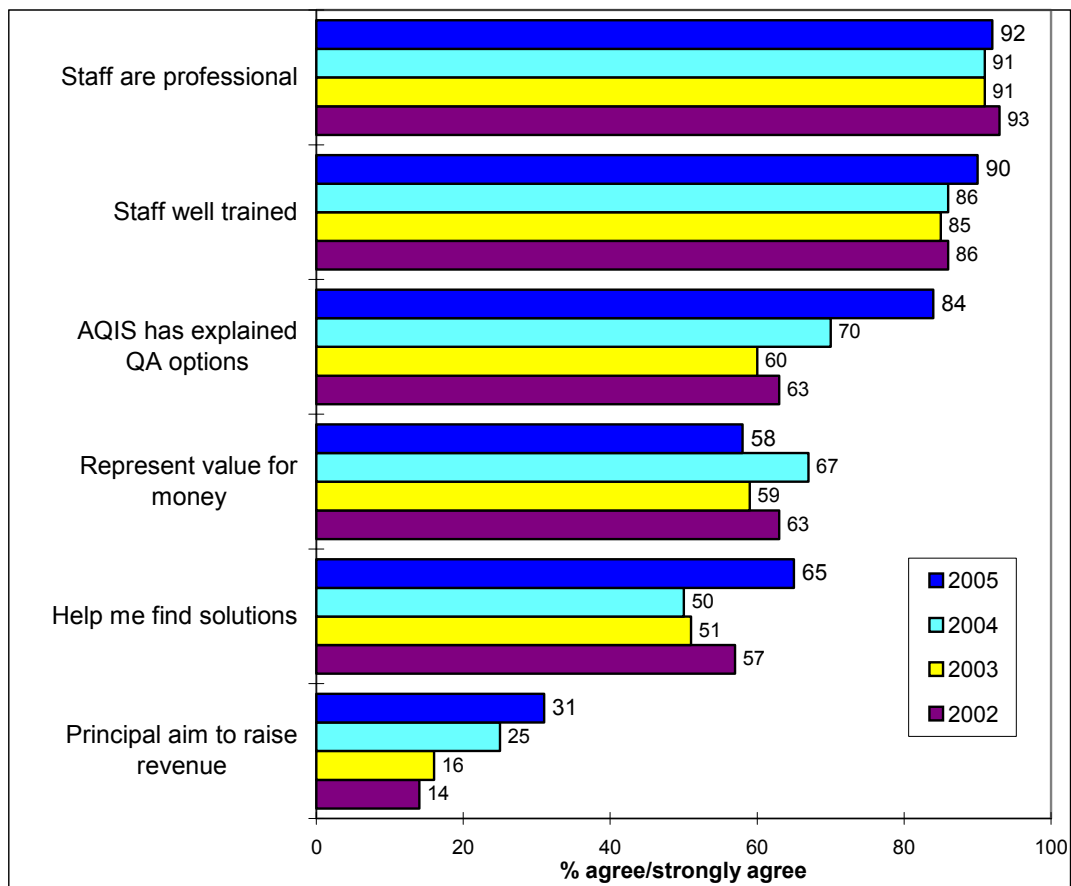
As shown in the graph overleaf, **two ratings of staff professionalism have improved since 2004:**

- ❖ 14% more clients say that AQIS has **adequately explained their QA/CA/Co-reg options** (84% agreed in 2005); and
- ❖ 15% more say **AQIS helps them find solutions** (65% agreed in 2005).

However, 9% **fewer clients** say the tasks AQIS performs are **value for money** (58% agreed and a significant proportion of 3 in 10 disagreed). Further, while in 2005 the majority (62%) disagreed that the aim of AQIS is to raise revenue, 3 in 10 agreed with this statement.

Professionalism statements	% Agree/ Strongly Agree	% Neither / Don't know	% Disagree/ Strongly Disagree
Staff are professional	92	1	7
Staff well trained	90	5	5
Adequately explained QA/CA/Co-reg options	84	13	3
Tasks AQIS performs are value for money	58	12	30
Helps me find solutions	65	10	26
Aim of AQIS is to raise revenue	31	6	62

Vessel-based Fish clients – Ratings of Staff Professionalism in 2002-2005



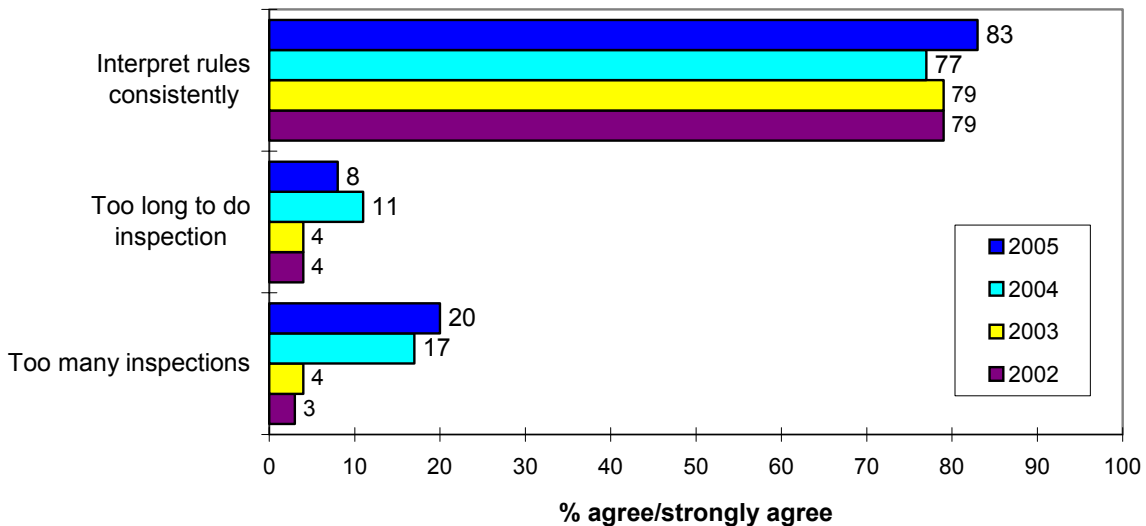
Integrity of staff

Slightly over eight in ten respondents (83%) agreed that there is **consistency in the interpretation of rules and regulations amongst staff**. This represents an increase of 6% since 2004.

In terms of inspections, **the vast majority *did not* agree that AQIS takes too long to do inspections** (85% disagreed), **or that AQIS conducts too many inspections** (70% disagreed). In fact, in 2005, compared to 2004, 3% more disagreed re there being too many inspections and 7% more disagreed re time taken to do inspections was too long.

Integrity statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Staff interpret rules and regulations in a consistent manner	83	3	14
AQIS do too many inspections or audits	20	10	70
Staff take too long to do inspections	8	7	85

Vessel-based Fish clients – Ratings of Staff Integrity 2002-2005



Openness of staff and of the organisation

Satisfaction with the openness of AQIS staff, and with the organisation as a whole, was very high in 2005 and all areas improved at least slightly since 2004.

Around 9 in 10 or more clients agreed that:

- ❖ AQIS's expectations are clear;
- ❖ They can contact staff when they need to; and
- ❖ Staff respond promptly to their requests for assistance.

In addition, about 8 in 10 or more clients agreed that:

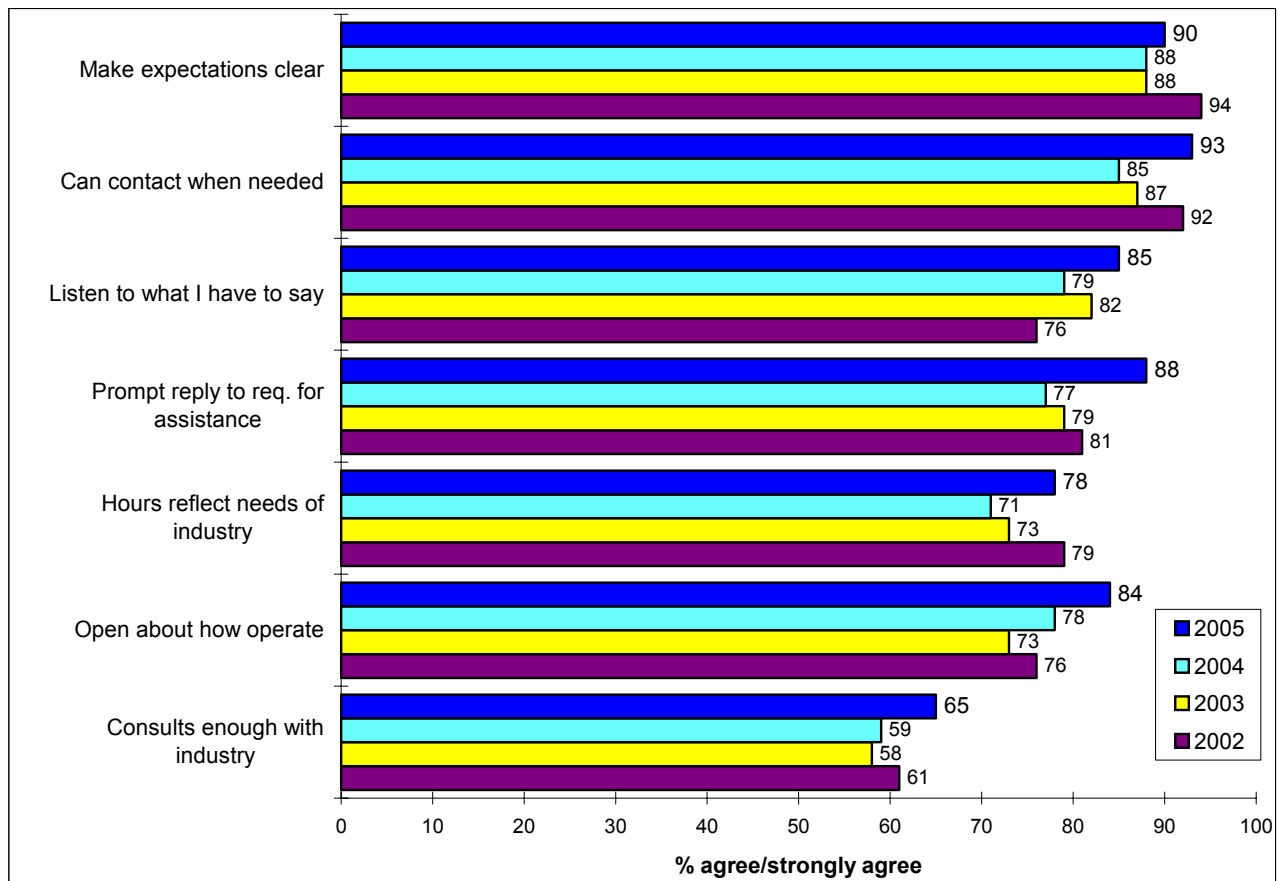
- ❖ Staff listen to them;
- ❖ AQIS is open about how it operates; and
- ❖ AQIS's hours of operation suit their needs.

Openness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Expectations are clear	90	0	10
Can contact AQIS when needed	93	2	5
Listens	85	7	8
Respond promptly to requests for assistance	88	4	8
Hours of operation reflect industry needs	78	11	11
Open about how they operate	84	7	9
Consults enough with industry	65	5	30

The main openness items where **improvement** occurred since 2004 include:

- **Respond promptly to requests for assistance** (11% more clients agreed in 2005); and
- **Can contact AQIS when needed** (8% more clients agreed in 2005).

Vessel-based Fish clients – Ratings of Staff Openness – 2002-2005



Fairness of staff

While the majority of Vessel-based Fish clients held positive views about the fairness of AQIS staff in 2005, views concerning some fairness items were mixed.

Almost nine in ten Vessel-based Fish clients agreed that AQIS staff respond promptly to requests for information. Further, approximately 6 in 10 or more:

- Agreed that AQIS takes the needs of business into account;
- Agreed that AQIS makes a positive contribution to business success (however a sizeable proportion - 34% - *disagreed*); and
- *Disagreed* that staff apply rules and regulations too strictly (while 3 in 10 agreed).

The item revealing the largest division in opinion concerned the balance between assistance and policing/regulating. Almost half (46%) Vessel-based Fish clients agree that AQIS should devote more time assisting while a similar proportion (40%) disagreed.

With regards to charge rates and AQIS costs, approximately 6 in 10 Vessel-based Fish clients agreed with the negative statement that AQIS charge rates are too high and 7 from 10 disagreed with the positive statement that Industry should meet all of AQIS's costs.

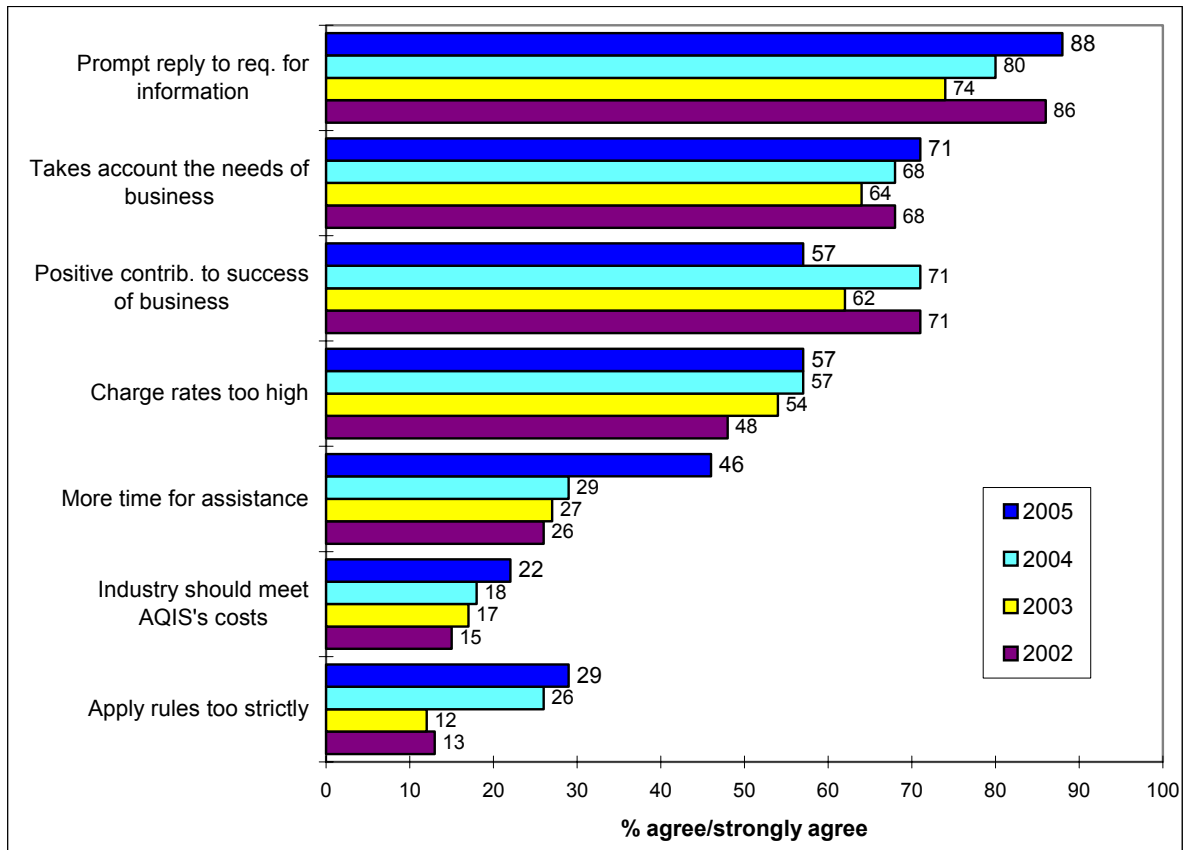
Compared to 2004 figures, **two significant decreases in satisfaction** highlight the following AQIS service areas for concern:

- ❖ **AQIS** makes a positive contribution to my business success – from 71% agreement in 2004 to 57% in 2005; and
- ❖ **AQIS should devote more time to assisting** rather than regulating from 29% agreement in 2004 to 46% in 2005.

On a positive note, compared to 2004 figures, agreement that AQIS staff deal with requests for information promptly increased in 2005 (from 80% agreement in 2004 to 88% in 2005).

Fairness statements	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
Responds promptly to requests for information	88	5	7
Makes positive contribution to business success	57	9	34
Take needs of business into account	71	7	21
Charge rates too high	57	10	33
Should devote more time to assistance/less to policing/regulating	46	13	40
Industry should meet all of AQIS's costs	22	7	71
Staff apply rules & regulations too strictly	29	13	58

Vessel-based Fish clients – Ratings of Staff Fairness in 2002-2005

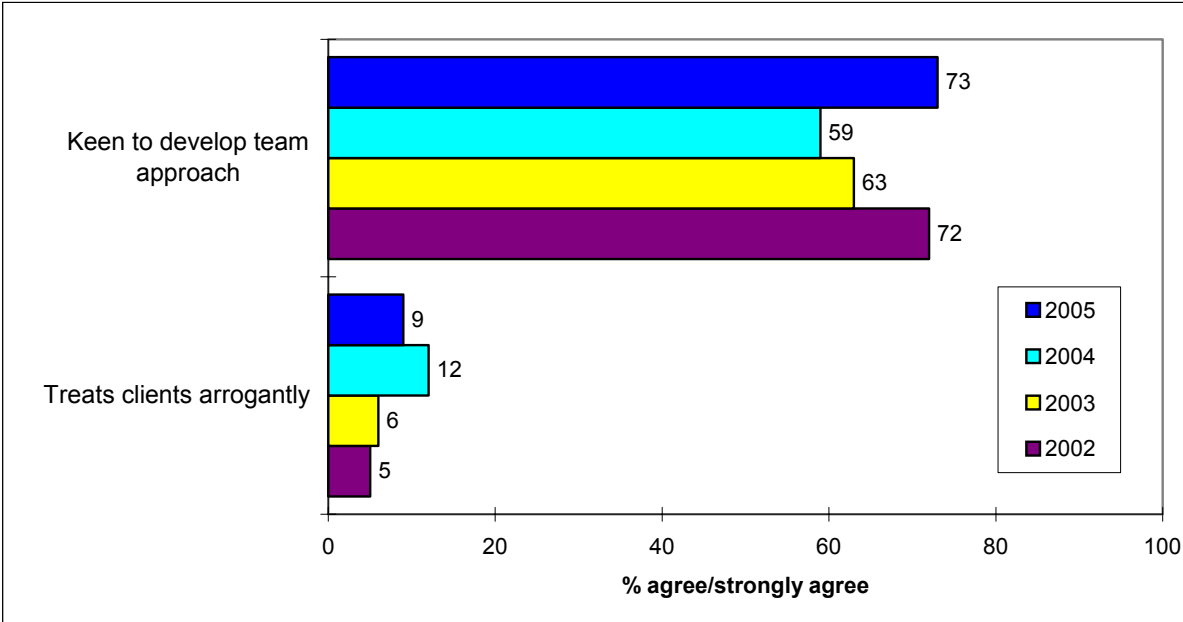


Respect

Vessel-based Fish clients generally agreed that AQIS staff treat them with respect. **The vast majority of respondents (87%) disagreed that AQIS staff treat their clients arrogantly.** The level of disagreement increased slightly since the previous survey (up 6% since 2004), and the proportion of clients agreeing that staff treat them arrogantly has decreased slightly (down 3% to 9% in 2005). Also, the majority of clients agreed that **AQIS staff are keen to develop a team approach with clients** –73% in 2005. This proportion is considerably higher than that reported in 2004 when 59% felt this way.

Respect statements	% Agree/Strongly Agree	% Neither/Don't know	% Disagree/Strongly Disagree
Keen to develop team approach	73	12	15
Treats clients arrogantly	9	4	87

Vessel-based Fish clients – Ratings of Staff Respect – 2002-2005



BROAD AQIS ISSUES

Primary role and function of AQIS

Respondents were asked what they perceived to be the primary role and function of AQIS. The table below shows that the most common view among Vessel-based Fish clients is that **AQIS's main role is to monitor the quality of exports** – the proportion of clients who felt this way increased significantly in 2005, from 25% in 2004 to 37% in 2005.

Approximately 1 in 6 clients felt that AQIS's main role is to:

- ❖ Protect Australia from incoming pests/diseases; and
- ❖ Ensure compliance.

Primary role & function of AQIS	% (n = 102)
Monitor quality of exports	37
Protect Australia from incoming pests/diseases	17
Ensure compliance	16
Monitor quality of imports	10
Don't know	7
Responsible for regulations	6
Facilitate/administer exports	5
Other	3
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 respondents (86%) were involved in exports. Of these, **70%** (i.e. 60%/86%) **felt that the AQIS label does add high, or at least some value**, when it comes to accessing overseas markets. This represents a decrease compared with 2004 results, when 90% felt that the AQIS label adds 'some value' or 'high value' to their products.

Value of AQIS label	% (n = 102)
High value	46
Some value only	14
Low value	5
No value at all	12
Don't know/Depends	10
Not involved in exports	14
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*). Results are shown in the table below.

Rating of value for money (on a scale of 1 – 10)	% (n = 102)
1 (Very poor value for money)	12
2-5	28
6-9	50
10 (Very good value for money)	10
TOTAL	100

Most respondents (60%) gave AQIS service value for money a rating of 6 or higher out of 10. **The average rating of value for money among Vessel-based**

Fish clients was 6.0 out of 10. This figure is just within positive territory and has **decreased significantly compared to 2003 and 2004 figures** (when the average rating of value for money was 6.6 and approximately 70% rated value for money 6 or higher out of 10).

Changes to AQIS charges over the last 12 months

Most Vessel-based Fish clients (48%) feel that charges have not changed in the past year. However, **slightly over a quarter (27%) feels that AQIS charges have increased** while only 1 in 20 (5%) believes that their AQIS charges have decreased. Approximately 1 in 5 (19%) did not know whether AQIS charges had changed over the last twelve months.

There figures have not changed significantly since 2004.

Changes to AQIS charges over the last 12 months	% (n = 102)
Decreased	5
Stayed the same	48
Increased	27
Both increased and decreased	1
Don't know	19
TOTAL	100

AQIS SERVICE CHARTER

Awareness of AQIS Service Charter

Aware of AQIS Service Charter?	% (n = 102)
Yes	13
No	83
Don't know	4
TOTAL	100

Respondents were asked whether or not they were aware that AQIS has a Service Charter. In 2005, **13% of Vessel-based Fish clients were aware of the AQIS Service Charter** –these figures are the same as the previous survey (2004).

Awareness of Service Standards in the Charter

Of those (13 Vessel-based Fish clients) that were aware of the Charter, over half (8) were also 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 = 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	62	68	55
Often	13	17	12
Sometimes	9	12	12
Rarely	1	0	1
Never	2	0	2
Don't know (DK)	14	4	19
TOTAL	101	101	101

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 + Often			
2002	77	87	60
2003	67	85	69
2004	80	88	69
2005	75	85	67
2005 (excluding 'DK' category)	87	89	83

In 2005, two thirds or more of Vessel-based Fish 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).

In fact, once we delete the segment of 'don't knows' (i.e. those not in a position to rate the particular service) within each of the standards noted above, more than **4 in 5 Vessel-based Fish clients report that AQIS 'always' or 'often' met all three service standards over the past 12 months.**

Overall, the likelihood of AQIS meeting these three service standards has remained consistently high – a positive high standard of service.

INDUSTRY CONSULTATION

Awareness of Peak Industry Organisations that consult with AQIS

In 2005, almost two in five Vessel-based Fish clients (38%) were aware of Peak Industry Organisations that consult with AQIS to represent their interests. The majority (57%) was not aware of any such organisations.

Aware of Industry Organisations?	% (n = 102)
Yes	38
No	57
Don't know	5
TOTAL	100

Membership of Peak Industry Organisations

Of those Vessel-based Fish clients who were aware of these Peak Industry Organisations, most (77%, or 30 people) are currently members of this peak body.

Member of Peak Industry Organisations	% (n = 39)
Yes	77
No	23
TOTAL	100

AQIS INFORMATION PRODUCTS

AQIS Bulletin

Receive AQIS Bulletin	% (n = 102)
Yes	43
No	53
Don't know	4
TOTAL	100

The table above shows that just over 2 in 5 (43%) Vessel-based Fish clients reported receiving the AQIS bulletin in 2005. This has declined slightly since the previous survey when half (50%), received the AQIS Bulletin.

Amongst those who do receive it, readership of the Bulletin is positive: **50%** of those who do receive it **read every edition** and a further 11% read it every few months. Furthermore, most of those who receive it also read most of it: **59% read half or more of the Bulletin** (34% read a quarter or less of it).

Finally, **most of those who receive it (57%) judge it to be useful:**

- ❖ 16% say it is very useful; and
- ❖ 41% say somewhat useful.

It is noted that a sizeable proportion of Vessel-based Fish clients (39%) feel the Bulletin is 'of little use' or 'not at all useful'.

Website visitation

The table below shows that in 2005, just over one in five of Vessel-based Fish clients (22%) said they had visited the AQIS website. This has increased by only 3% since 2004.

Visited the AQIS Web site	% (n = 102)
Yes	22
No	78
TOTAL	100

Most of those who have visited the website (50%) do so only once or twice a year:

- ❖ 9% visit weekly;
- ❖ 18% visit monthly;
- ❖ 50% visit only once or twice a year;
- ❖ 9% visit every few years.
- ❖ 14% visit only if they know there is something new.

Most of those who visit the website (64%) judge it to be useful:

- ❖ 23% say it is very useful; and
- ❖ 41% say somewhat useful.
- 23% felt the website was 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 range of interests of Vessel-based Fish clients on the AQIS website. Please note that the percentages presented are based on the small sample of 22 Vessel-based Fish clients who reported visiting the AQIS website.

❖ Exporting fish and fish products	36%
❖ Useful links - Export.....	14%
❖ Export facilitation	14%
❖ Import requirements.....	9%
❖ Don't know	18%
❖ Other	18%

SPECIAL INTEREST ISSUES

QA arrangement vs. End-product Inspection

Respondents were asked if they employ an AQIS co-regulation quality assurance arrangement or an end product inspection system for their cargo. In 2005, almost two thirds (63%) of Vessel-based Fish clients reported having a QA system in place while just over a third (37%) reported having an end product inspection or neither.

QA arrangement or End-product Inspection system in place	2002 % (n = 69)	2003 % (n = 100)	2004 % (n = 103)	2005 % (n = 102)
End-product	70	42	65	63
QA	30	58	35	37
TOTAL	100	100	100	100

Type of QA arrangement

Of those (64 respondents) who have an AQIS approved QA system in place, more than 7 in 10 (72%) employ a Food Processing Accreditation (FPA) system. This remains the most popular quality assurance system since 2002.

Type of QA arrangement	% (n = 64)
Food Processing Accreditation (FPA)	72
Approved Quality Assurance	5
Don't know	12
Other	11
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.

Results are shown in the table below.

AQIS's role in clients' QA arrangement (n = 64)	% Agree/ Strongly Agree	% Neither/ Don't know	% Disagree/ Strongly Disagree
AQIS was helpful in developing a QA system	82	5	13
AQIS is very knowledgeable about QA systems	78	14	9

The results show that, in 2005 Vessel-based fish clients were very satisfied with AQIS's role in their QA arrangement, with eight in ten agreeing that AQIS was helpful in developing their system and almost the same for AQIS being very knowledgeable about such QA systems.

Improvements to QA/CA/Co-reg systems

Vessel-based Fish clients were asked what improvements they could suggest to the system. More than one in four clients (27%) reported that they could think of no improvements to the QA/CA/Co-reg system.

Of the suggestions made there was a spread across a number of issues. The only issue noted by a fair proportion (approximately 1 in 5 clients) was that AQIS needs to work more closely with industry.

Overall, this was a **positive result indicating that the QA/CA/Co-reg systems are performing well**. It is noted, however, that the proportion of clients reporting they could think of **no improvements to the QA/CA/Co-reg system** was greater in 2004 (62%).

The suggestions provided by clients are shown in the table below.

Improvements to QA/CA/Co-reg systems	2005 % (n = 64)
None/ nothing	27
Need to work more closely with industry	19
System needs to be simplified	11
System should cost less	8
AQIS needs to increase its presence	5
Training process needs review	3
AQIS needs to place more trust in Industry	3
Don't know/Can't say	31
Other (idiosyncratic/unique comments)	12

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

QA system audit

Respondents who have a QA system in place were asked who audits their system. Close to 9 in 10 (or 57 from 64 participants) reported that they are audited by AQIS. The remaining clients noted either that they were unsure who they are audited by or they are audited by another accredited body (though, due to the small sample size the exact percentages are not reported).

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 – 82% – 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, and has remained constant since the previous survey period.

Overall satisfaction with QA system

Finally, respondents who have a QA system in place were asked whether they felt that their QA system is working well – the vast majority (81%, or 52 from 64 people) said that it is.

Shipment clearance facilitation

Vessel-based Fish clients were also asked whether they had used AQIS’s service in negotiating with port authorities in overseas markets to help clear shipments of their fish. Only 11% (11 from 102 people) said that they had used this assistance. Most of these clients (8 of 11) rated this service highly (with a satisfaction score of 7 or more out of 10).

CLIENT COMMENTS

Vessel-based Fish clients were given the opportunity to supply an additional comment at the end of the survey and 36% (or 37 clients) took up this opportunity to comment. The 57 comments they generated in total were either suggestions for improvement, criticism or 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 17 of 57 comments (or approximately 1 in 3 comments from 37 people) noted there needed to be an **improvement in rule interpretation and**

application. The majority of clients who made this comment were most concerned about perceived inconsistencies in AQIS 'Export' and 'Import' regulations, followed next by inconsistencies in the application or interpretation of regulations between AQIS staff members and departments.

The comments are presented in the table below. All points raised have been covered in various sections of the current report and indicate that all aspects considered important to Vessel-based Fish clients have been examined.

Additional comments made by Vessel-based Fish Clients	2005 counts (n = 37)
Need more consistent rule interpretation and application	17
Need more awareness of the market place	5
Fees too high/need flexible fee structure	4
Other	4
Not enough flexibility/negative bureaucratic attitude/Over-regulated	3
Don't understand business/my business	3
<i>Happy, doing a good job</i>	2
<i>Performs a necessary function/valuable service</i>	2
Unprofessional/bad customer service	1
More accessible staff/ accessible when required/ instead of answering mach.	1
More flexible hours/ contactable outside business hours	1
Need to improve communication/not informed of changes/ delays etc.	1
Dissatisfied/unhappy	1
Too political/Government revenue raiser	1
Poor training of staff/need improvement of training/specialist staff	1
More staff/more regional staff	1
Need better billing services/invoicing/accounting	1

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