

U.S. Department of Agriculture Foreign Agricultural Service

Customer Satisfaction Survey

Final Report
September 2008



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EXECUTIVE SUMMARY

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Overall Findings and Recommendations

- Customer satisfaction with FAS is slightly above the federal government average. The 2008 score (70) serves as a baseline measure for the Foreign Agricultural Service.
- Three of the overall objectives of FAS, creating a level playing field for international trade, expanding the global agricultural trading system, and reducing technical trade barriers and restrictive SPS (Sanitary and Phytosanitary) measures were found to have relatively low impact on customer satisfaction. This is not to conclude that these areas are not important to customers, but rather improvements in these areas will not directly yield a significant increase in customer satisfaction.
- In the area of creating a level playing field for international trade, customers thought that FAS was doing moderately well in the areas of eliminating barriers, enforcing trade agreements and building international support. However, with scores in the mid 60s for each of these areas, respondents indicated there was an opportunity to improve.
 - Among the items in creating a level playing field, customers thought the performance of FAS was best in representing U.S. agricultural interests in the WTO. Lowest marks were for reducing tariffs to allow for better international market access and implementing international dispute settlement decisions in a timely manner.
- With respect to the area of expanding the global agricultural trading system, customers thought that FAS was performing the best in facilitating U.S. commercial trade. Respondents felt that FAS was supporting agricultural export industry trade missions and trade teams and were knowledgeable about global commodity markets. Respondents felt that while FAS was doing relatively well to support international economic development, the bio-fuel initiative was not thought of as a significant contributor to international economic development.
- In the area of reducing technical trade barriers and restrictive SPS (Sanitary and Phytosanitary) measures, respondents rated FAS highest for development and adoption of science-based international standards. The role FAS has in monitoring and enforcing SPS rules and TBT agreement commitments was rated lowest.
 - While FAS did not receive particularly strong ratings for addressing SPS and technical trade barriers through bilateral discussions, respondents thought that FAS did well in maintaining strong relationships with foreign regulatory officials through overseas attachés.
- Management initiatives and in particular, Operational Excellence, were found to have a high impact on customer satisfaction. Operational Excellence was also the highest performing area as rated by customers. While the other survey areas addressed functions of FAS, since Operational Excellence measured an area that has a high degree of interaction with the customer, it follows that this area has the highest impact on satisfaction. The low impacts of the areas that address the function of FAS does not mean that they are unimportant to customer satisfaction, but rather improvements in those areas will not substantially drive satisfaction.
 - Respondents though the staff was accessible to them. They also found staff to be professional and courteous, and good with follow up.

- In order to improve customer satisfaction, it is recommended to focus on the high-impact and lower performing areas as a first priority. In the customer satisfaction model for FAS, the only area that has a sizeable impact on customer satisfaction, Operational Excellence, happens to be the highest performing area as well. However, with ratings in the 70s for most items in this area, there is opportunity to improve Operational Excellence.
 - While the staff is courteous, professional and accessible, the areas of staff knowledge (including industry and foreign markets), representing and promoting client business needs and facilitating with other U.S. Government offices present the best opportunities for improvement.
- Scores for Commodity Interest Stakeholders showed some significant differences between this group of respondents and those who were not.
 - Commodity Interest Stakeholders rated FAS higher for building international support for U.S. producers and exporters and also rated FAS higher for their overseas offices' ability to intervene and resolve trade disruptions. Commodity Interest Stakeholders rated FAS higher for Operational Excellence as well.
 - This group gave significantly higher ratings to the staff for professionalism, courtesy and follow up. Commodity Interest Stakeholders also thought FAS was more effective in facilitating interaction with other U.S. Government offices or representatives.
 - Lastly, Commodity Interest Stakeholders were more likely to return to FAS in the future than non-Stakeholders.
- For future surveys, if FAS desires to gain a better understanding of how results may vary by organization type, it is recommended to develop a few key categories to use for classifying respondents and provide additional sample by group wherever possible.

DETAILED REPORT

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Introduction & Methodology

The American Customer Satisfaction Index (ACSI) is the national indicator of customer evaluations of the quality of goods and services available to U.S. residents. It is the only uniform, cross-industry/government measure of customer satisfaction. Since 1994, the ACSI has measured satisfaction, its causes, and its effects, for seven economic sectors, 41 industries, more than 200 private-sector companies, two types of local government services, the U.S. Postal Service, and the Internal Revenue Service. ACSI has measured more than 100 programs of federal government agencies since 1999. This allows benchmarking between the public and private sectors and provides information unique to each agency on how its activities that interface with the public affect the satisfaction of customers. The effects of satisfaction are estimated, in turn, on specific objectives (such as public trust).

ACSI is produced by the University of Michigan in partnership with CFI Group, and the American Society for Quality. This report was produced by CFI Group in collaboration with the University of Michigan. If you have any questions regarding this report, please contact CFI Group at 734-930-9090.

Segment Choice

This report is about the customers of the USDA Foreign Agricultural Service (FAS). The following are the number of respondents by organization type. Because of the multiple numbers of groups and relatively low number of responses within each grouping, analysis is at the aggregate level and by the Segment Commodity Interest Stakeholders, which are shown in bold.

Organization	Respondents
Agricultural Policy Advisory Committee (APAC) Members 2008 - 2012	3
Animals and Animal Products ATAC Members 2008 - 2012	3
APAC	6
ATAC: Animals and Animal Products	8
ATAC: Fruits and Vegetables	6
ATAC: Grains, Feeds, and Oilseeds	8
ATAC: Processed Foods	7
ATAC: Sweeteners	4
ATAC: TCPSS	5
Cotton, Oil, Tobacco, and Seed	3
Dairy, Livestock, and Poultry	2
Forest and Fishery Products	4
Fruits & Vegetables ATAC Members 2008 - 2012	1
Grains, Feed & Oilseeds ATAC Members 2008 - 2012	3
GSM Exporter	8
Horticultural and Tropical Products	6
Legislators	2
Misc. Associations	1
NGO/PVO	14
Processed Foods ATAC Members 2008 - 2012	5
Processed Products	5
Sweeteners ATAC Members 2008 - 2012	2
Tobacco, Cotton, Peanuts & Planting Seeds ATAC Members 2008 - 2012	1
U.S. Government Agencies	1
Total	108

Customer Sample and Data Collection

The USDA Foreign Agricultural Service provided CFI Group with a sample of names and e-mail addresses. A total of 570 unique e-mail addresses were provided. From the invitations sent, a total of 108 customers responded for a response rate of 19%. Another nine responses were collected from an outbound general invitation to a listserv. Overall, a total of 117 survey responses were collected.

Questionnaire and Reporting

The questionnaire used is shown in Appendix A. It was designed to be agency-specific in terms of activities, outcomes, and introductions to the questionnaire and specific question areas. However, it follows a format common to all the federal agency questionnaires that allow cause-and-effect modeling using the ACSI model.

Most of the questions in the survey asked the respondent to rate items on a 1 to 10 scale, where “1” is “poor” and “10” is “excellent.” Scores are converted to a 0 to 100 scale for reporting purposes. Appendix B contains a table for all questions at an aggregate level. Appendix C contains verbatim comments to the responses for open-ended questions.

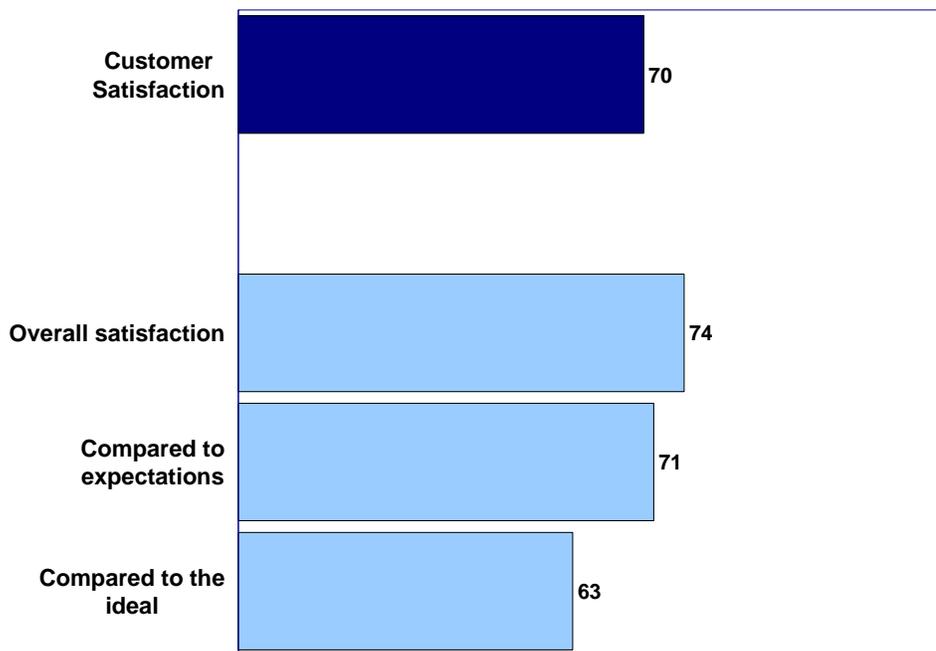
The findings from the survey are organized in the report by the objectives of FAS, which include: Creating a level playing field for international trade, Expanding the global agricultural trading system, Reducing technical trade barriers and restrictive SPS (Sanitary and Phytosanitary) measures, and Management Initiatives.

ACSI Results

Customer Satisfaction (ACSI)

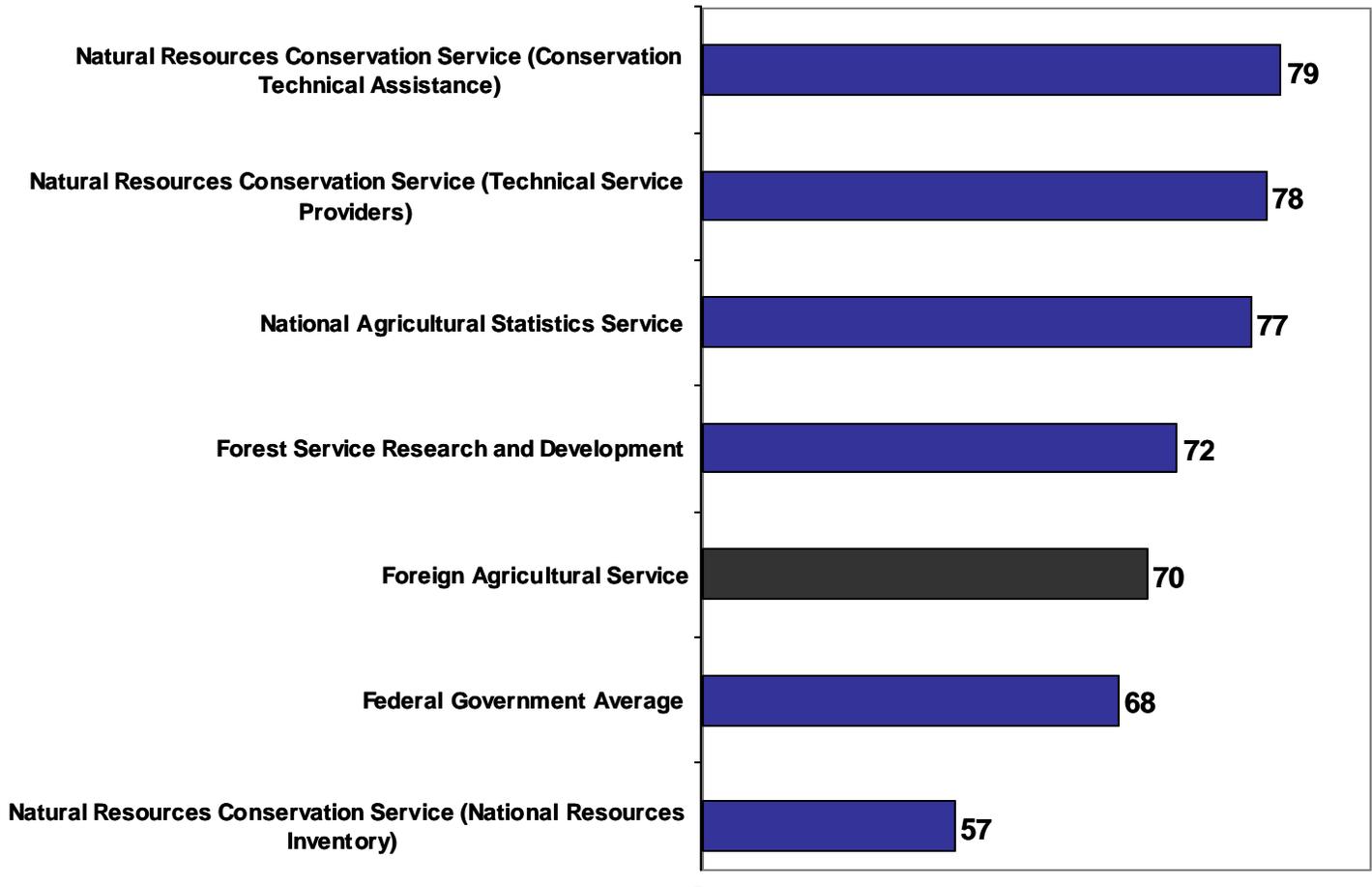
The **Customer Satisfaction Index (CSI)** is a weighted average of three questions. The questions are answered on 1 to 10 scale and converted to a 0 to 100 scale for reporting purposes. The three questions measure: Overall satisfaction, Satisfaction compared to expectations, and Satisfaction compared to an “ideal” organization. The model assigns the weights to each question in a way that maximizes the ability of the index to predict changes in agency satisfaction.

The 2008 Customer Satisfaction Index (CSI) for FAS customers is 70 on a scale of 0 to 100. This is currently two points above the federal government average (68). The following page contains benchmarks with other agencies within the USDA and the overall Federal Government average.



Benchmarks

Other USDA agencies that have recently measured customer satisfaction are shown in the chart below along with the current Federal Government average.



Foreign Agricultural Service Customer Satisfaction Model

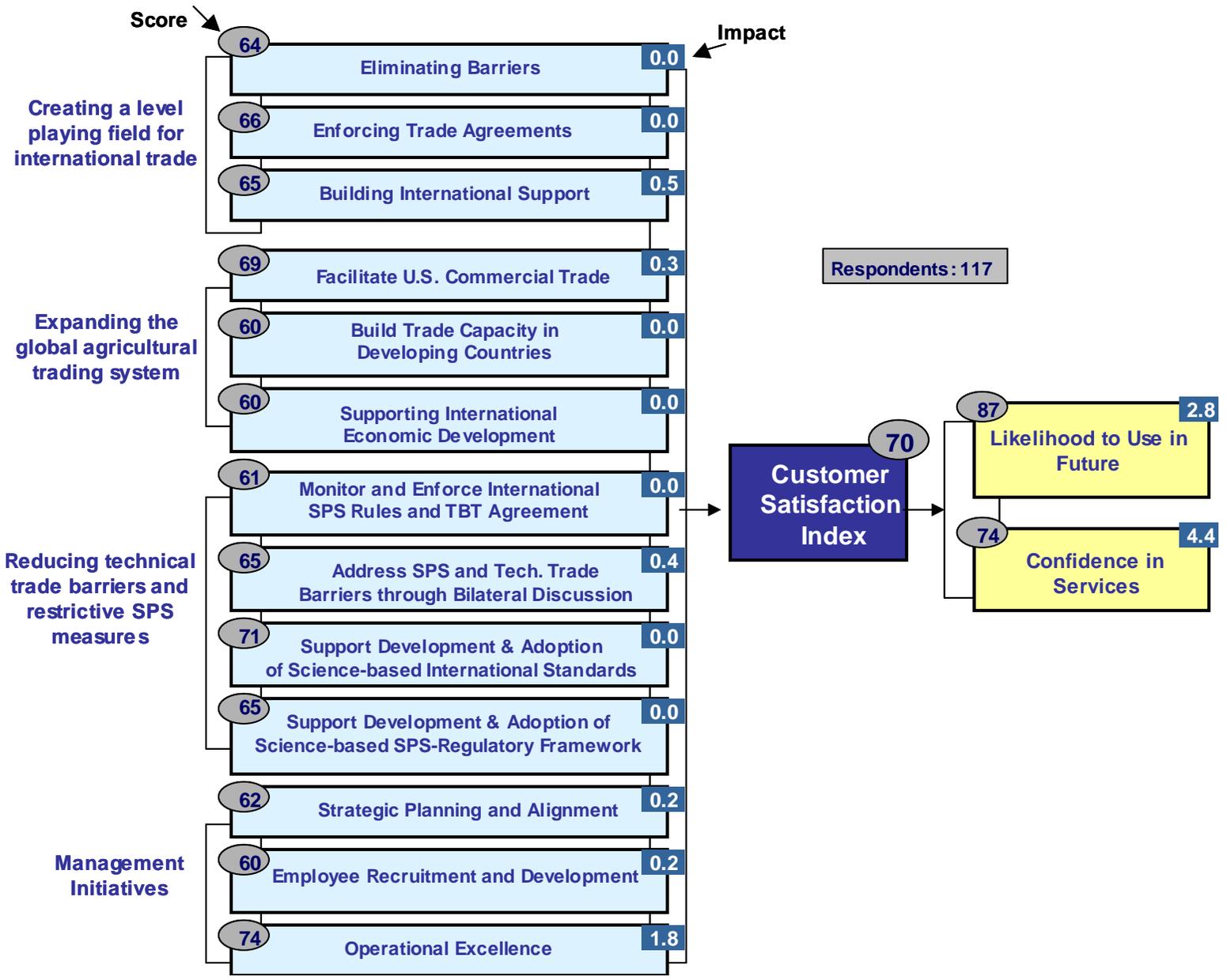
Attribute scores are the mean (average) respondent scores to each individual question that was asked in the survey. Respondents are asked to rate each item on a 1 to 10 scale with “1” being “poor” and “10” being “excellent.” CFI Group converts the mean responses to these items to a 0 to 100 scale for reporting purposes. It is important to note that these scores are averages, not percentages. The score is best thought of as an index, with 0 meaning “poor” and 100 meaning “excellent.” Scores are provided for each area in the ovals on the graphic in the following page.

A component score is the weighted average of the individual attribute ratings given by each respondent to the questions presented in the survey. A score is a relative measure of performance for a component, as given for a particular set of respondents. The individual questions that comprise each component can be found in Appendix A of this report. The results for the individual questions are also reported in the drivers of satisfaction section of this report. Components are grouped by the program areas that were defined by FAS. These program areas are on the left hand side of the graphic on the next page.

Impacts should be read as the effect on the subsequent component if the initial driver (component) were to be improved or decreased by five points. For example, if the score for Operational Excellence increased by 5 points (74 to 79), Customer Satisfaction would increase by the amount of its impact, 1.8 points, (70 to 71.8). If the driver increases by less than or more than five points, the resulting change in satisfaction would be the corresponding fraction of the original impact. Impacts are additive. Thus, if multiple areas were to each improve by 5 points the related improvement in satisfaction will be the sum of the impacts. Satisfaction, in turn, drives outcome behaviors shown on the right-hand side of the model. These outcomes include likelihood to use again and confidence in services.

As with scores, impacts are also relative to one another. A low impact or zero impact does not mean a component is unimportant. Rather, it means that a five-point change in that one component is unlikely to result in much improvement in Satisfaction at this time. Therefore, components with higher impacts are generally recommended for improvement first, especially if scores are lower for those components.

USDA FAS Customer Satisfaction Model



The 90% confidence interval for the Customer Satisfaction Index is +/- 3.3 points.

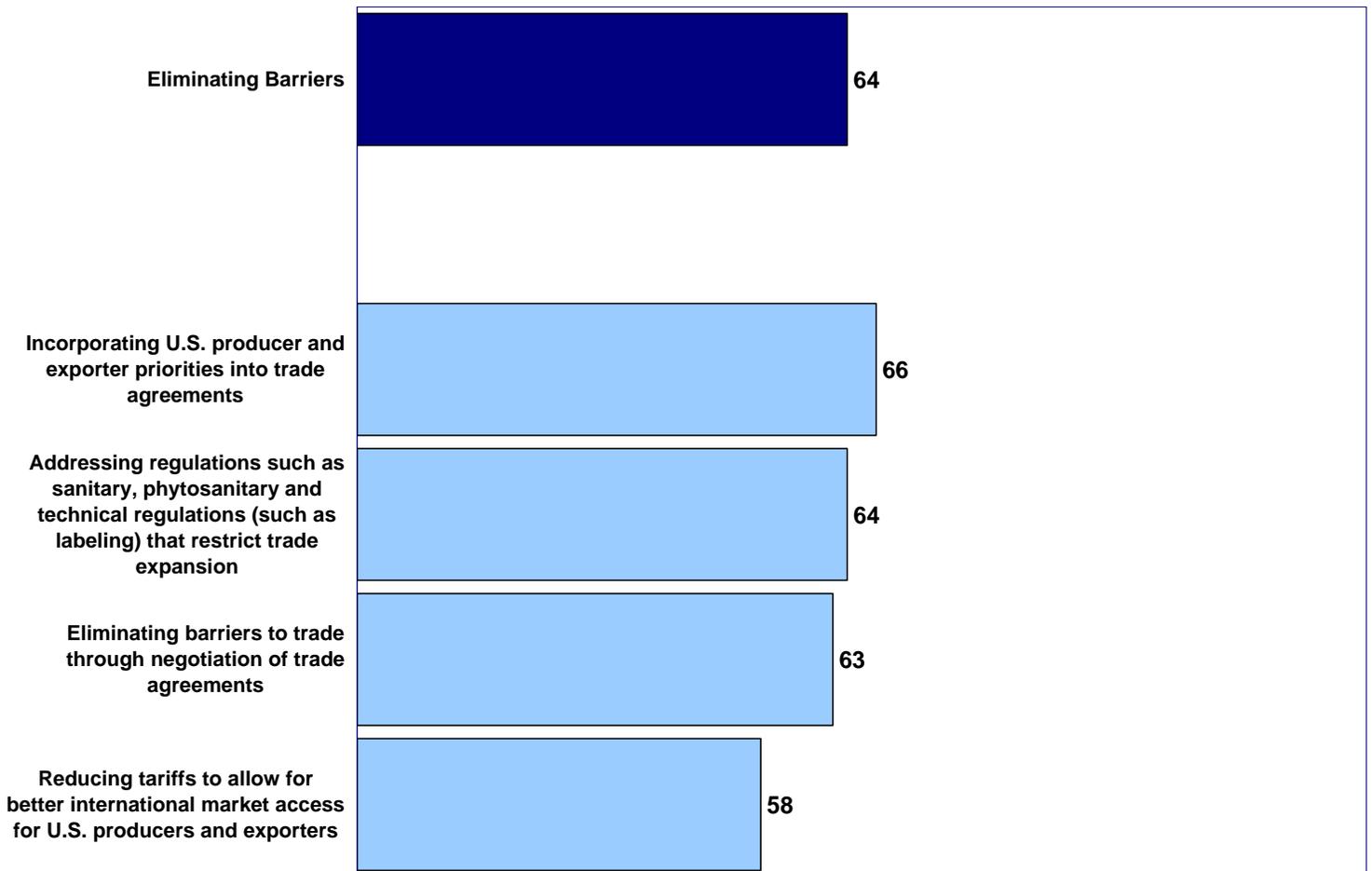
Drivers of Customer Satisfaction

Creating a level playing field for international trade

Three component areas comprise Creating a level playing field for international trade: Eliminating Barriers, Enforcing Trade Agreements and Building International Support. Respondents gave similar and moderate ratings to each of these three areas with scores only ranging from 64 to 66 for these three components. There was some greater variation among the ratings of individual questions. The following are the scores for each area. Scores represent the average on a 0 to 100 scale with “0” being “Poor” and “100” being “Excellent”.

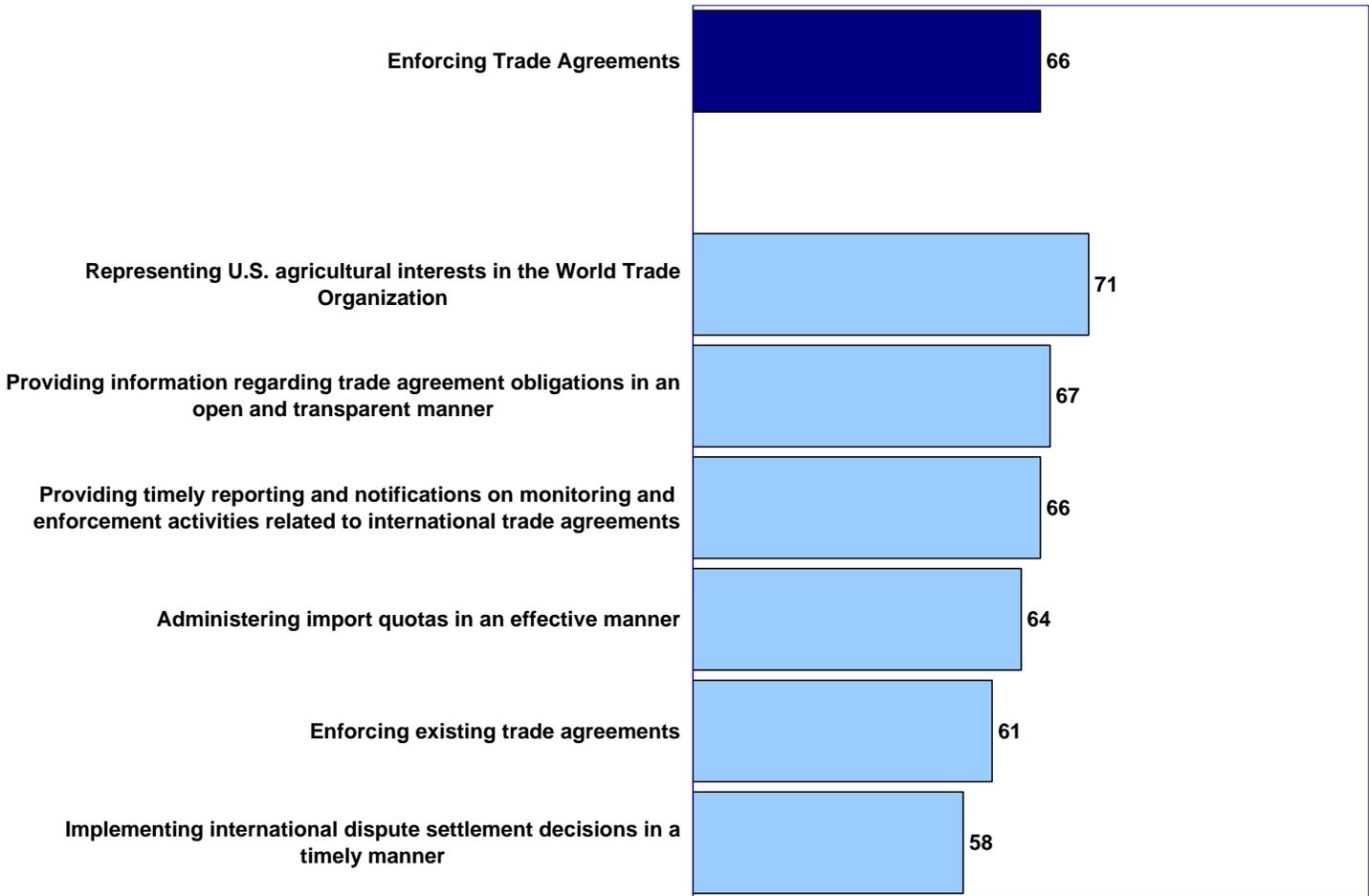
Eliminating Barriers

Respondents rated three of the questions within Eliminating Barriers in the low to mid 60s. Incorporating U.S. producer and exporter priorities into trade agreements, addressing regulations and eliminating barriers to trade through negotiation of trade agreements scored similarly within the narrow range of 63 to 66. Reducing tariffs to allow for better international market access was rated the lowest of the eliminating barriers items with a rating of 58.



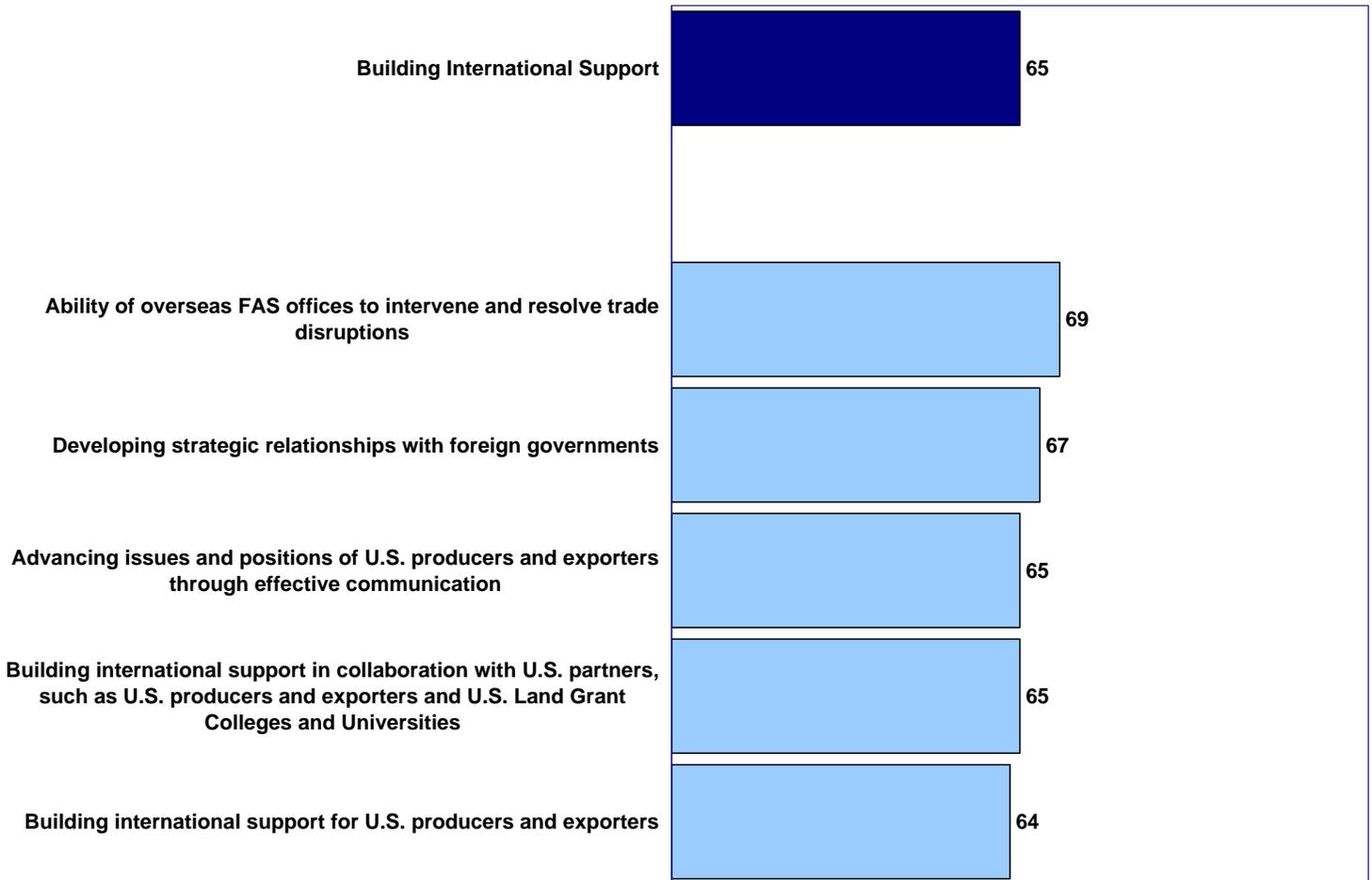
Enforcing Trade Agreements

Of the enforcing trade agreements items, respondents felt most strongly about FAS representing U.S. agricultural interests in the WTO with a rating of 71. Conversely, they felt the least positive about implementing international dispute settlement decisions in a timely manner (58) and enforcing existing trade agreements (61). Administering import quotas in an effective manner, providing timely reporting and notifications on monitoring and enforcement activities and providing information in an open and transparent manner were rated in the mid 60s.



Building International Support

Building international support received consistent ratings among the five items that were asked to respondents. The ability of overseas FAS offices to intervene and resolve trade disruptions received the highest rating of this area (69). However, ratings fell in the mid to high 60s for all items.

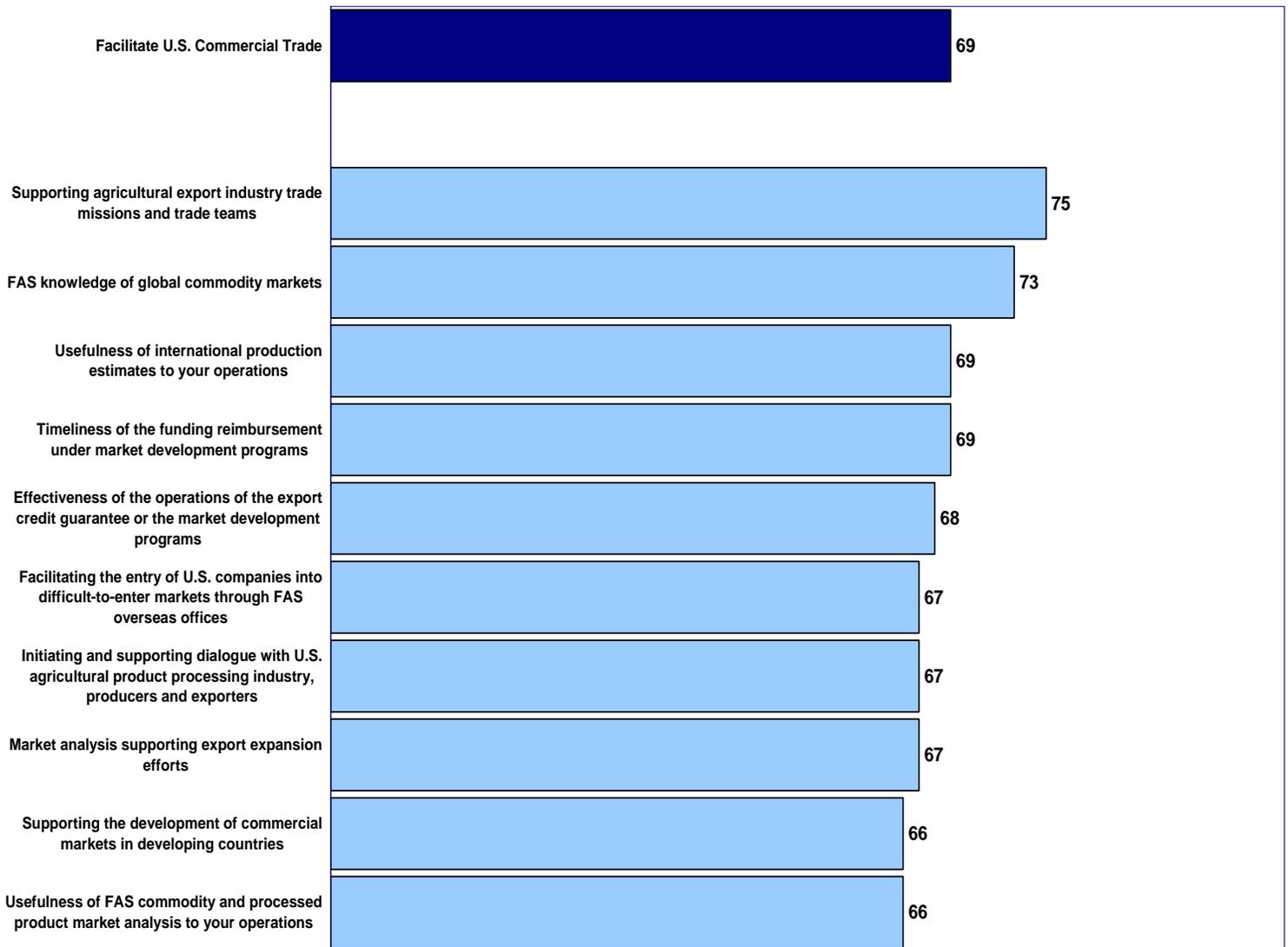


Expanding the Global Agricultural Trading System

Three component areas comprise Expanding the Global Agricultural Trading System: Facilitate U.S. Commercial Trade, Build Trade Capacity in Developing Countries and Supporting International Economic Development. Of these three areas, respondents gave the highest rating to Facilitating U.S. Commercial Trade (69) rating it 9 points higher than both Build Trade Capacity in Developing Countries (60) and Supporting International Economic Development (60). The following are the scores for each area. Scores represent the average on a 0 to 100 scale with “0” being “Poor” and “100” being “Excellent”.

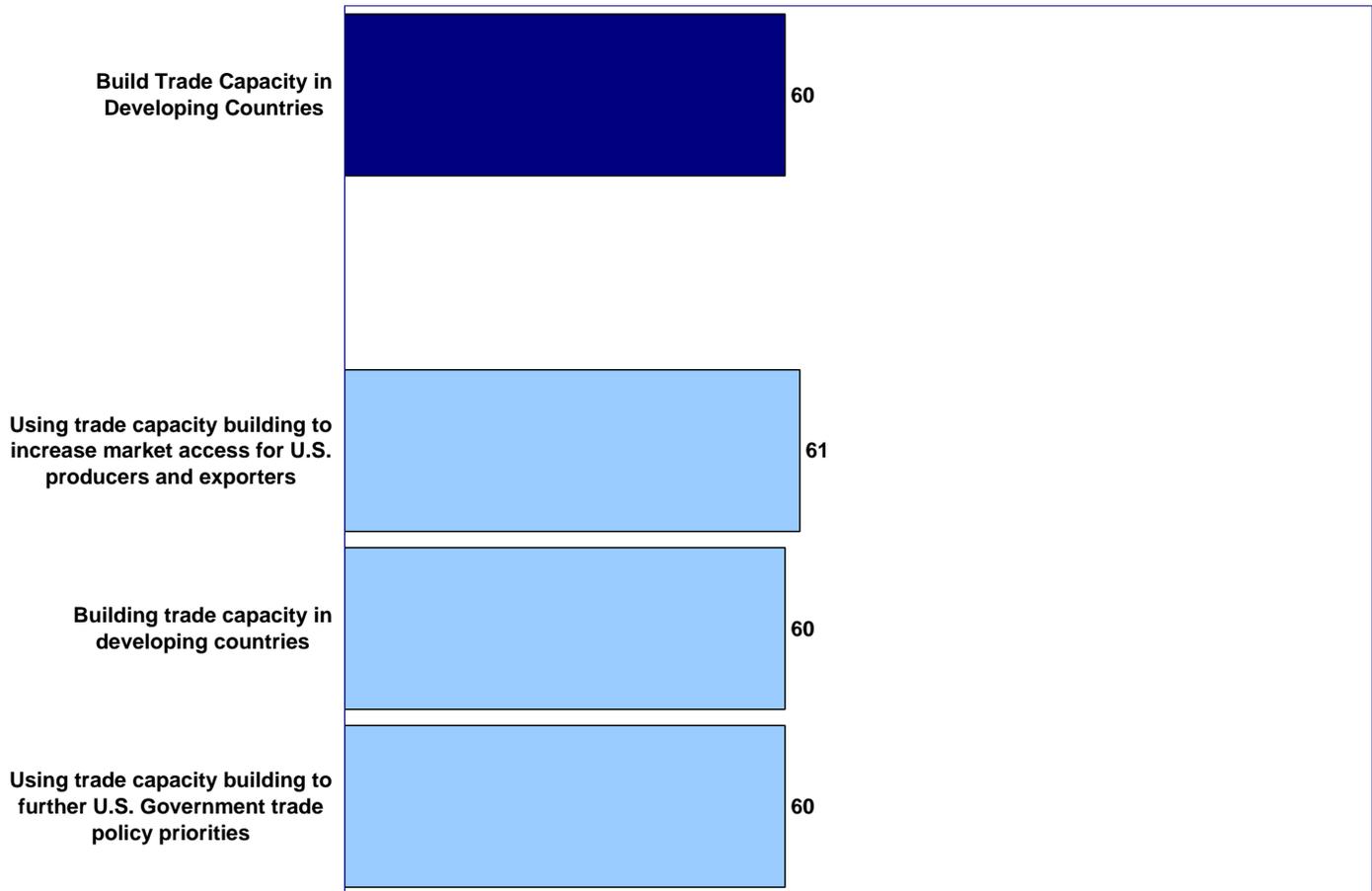
Facilitating U.S. Commercial Trade Through Trade-related Programs, Information and Overseas Offices

Facilitating U.S. commercial trade was rated the highest of the three Expanding the Global Agricultural Trading System components. Respondents found FAS to be performing the highest in supporting agricultural export industry trade missions and trade teams (75). Knowledge of global commodities markets also received a rating in the 70s (73). Eight additional items were asked about this area with ratings for those items with little variance in scores, only ranging from 66 to 69. Scores and items are shown in the chart below.



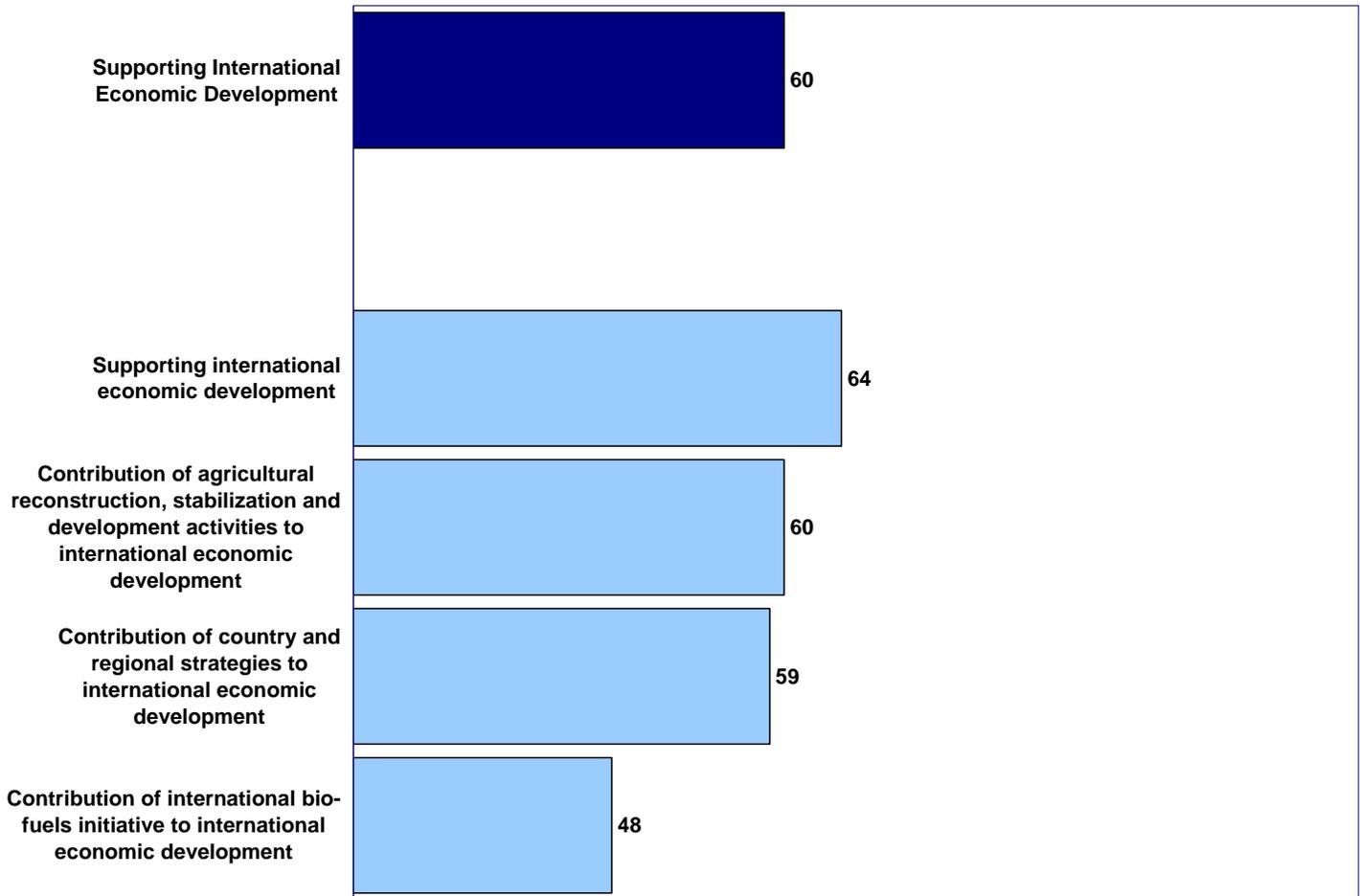
Build Trade Capacity in Developing Countries

Respondents gave similarly low ratings to the three items within Build Trade Capacity in Developing Countries. Using trade capacity building to increase market access for U.S. producers and exporters, building trade capacity in developing countries and using trade capacity building to further U.S. Government trade policy priorities received either a 60 or 61.



Supporting International Economic Development

In rating supporting international economic trade development, respondents scored this particular item 64. The grouping of questions that involved international economic development received a fairly wide range of scores. Compared to the score of 64 for supporting international economic development, the contribution of international bio-fuels initiative to international economic development only scored 48. This was the lowest rated item of all survey questions, not just those within the area of Expanding the Global Agricultural Trading System. Agricultural reconstruction, stabilization and development activities and contribution of country and regional strategies were also rated somewhat lower in their contributions to international economic development than the rating given to FAS supporting international economic development.



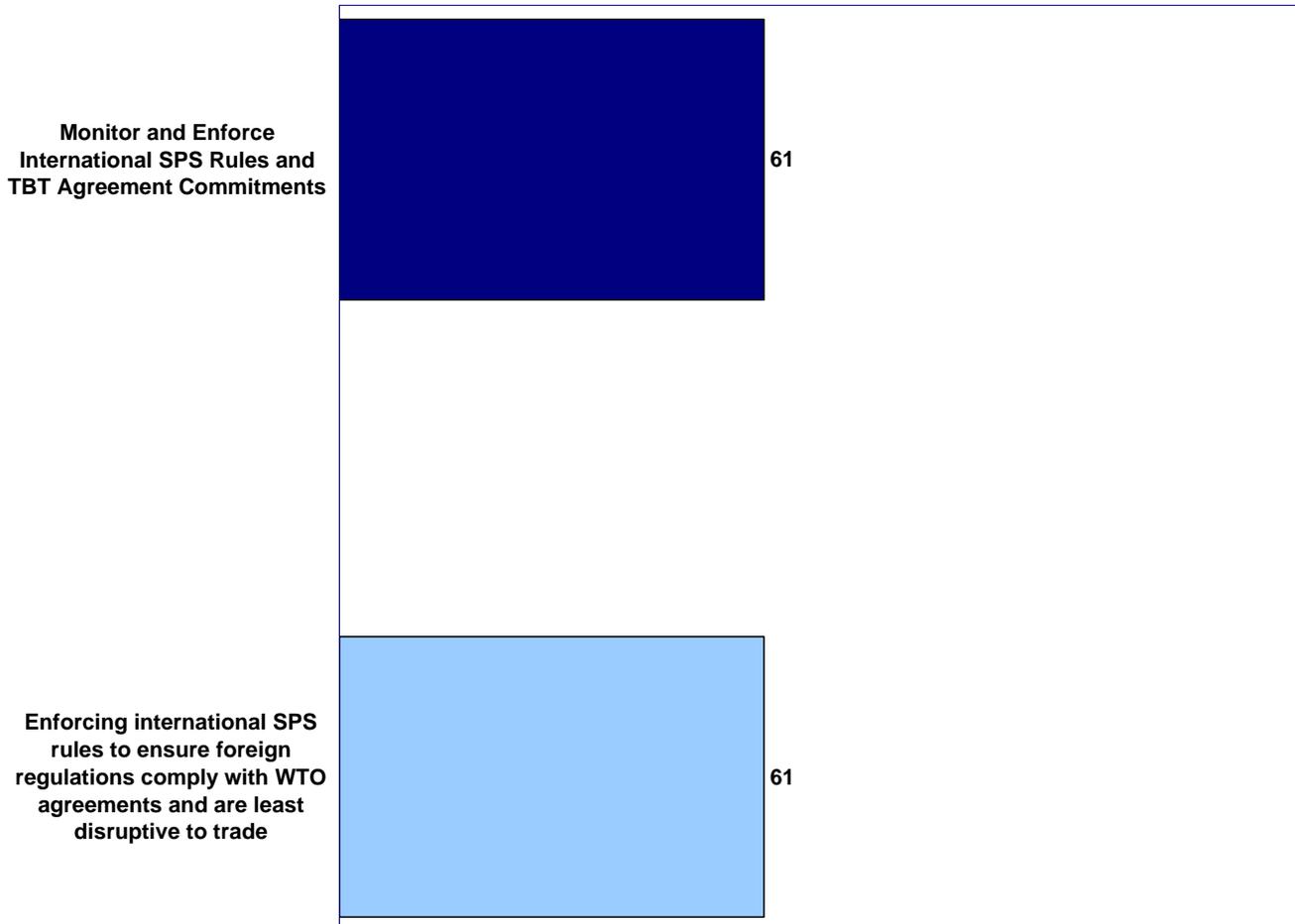
Reducing technical trade barriers and restrictive SPS (Sanitary and Phytosanitary) measures

Four component areas comprise Reducing technical trade barriers and restrictive SPS measures: Monitor and Enforce International SPS Rules and TBT Agreement Commitments, Support Development and Adoption of Science-based International Standards, Support Development and Adoption of SPS Regulatory Framework and Address SPS and Technical Trade Barriers through Bilateral Discussions. The first three of these areas were measured with a single question.

Of these four areas, respondents gave the highest rating to Support Development and Adoption of Science-based International Standards (71). Respondents felt the least positive about Monitor and Enforce International SPS Rules and TBT Agreement Commitments (61). The following are the scores for each area. Scores represent the average on a 0 to 100 scale with “0” being “Poor” and “100” being “Excellent”.

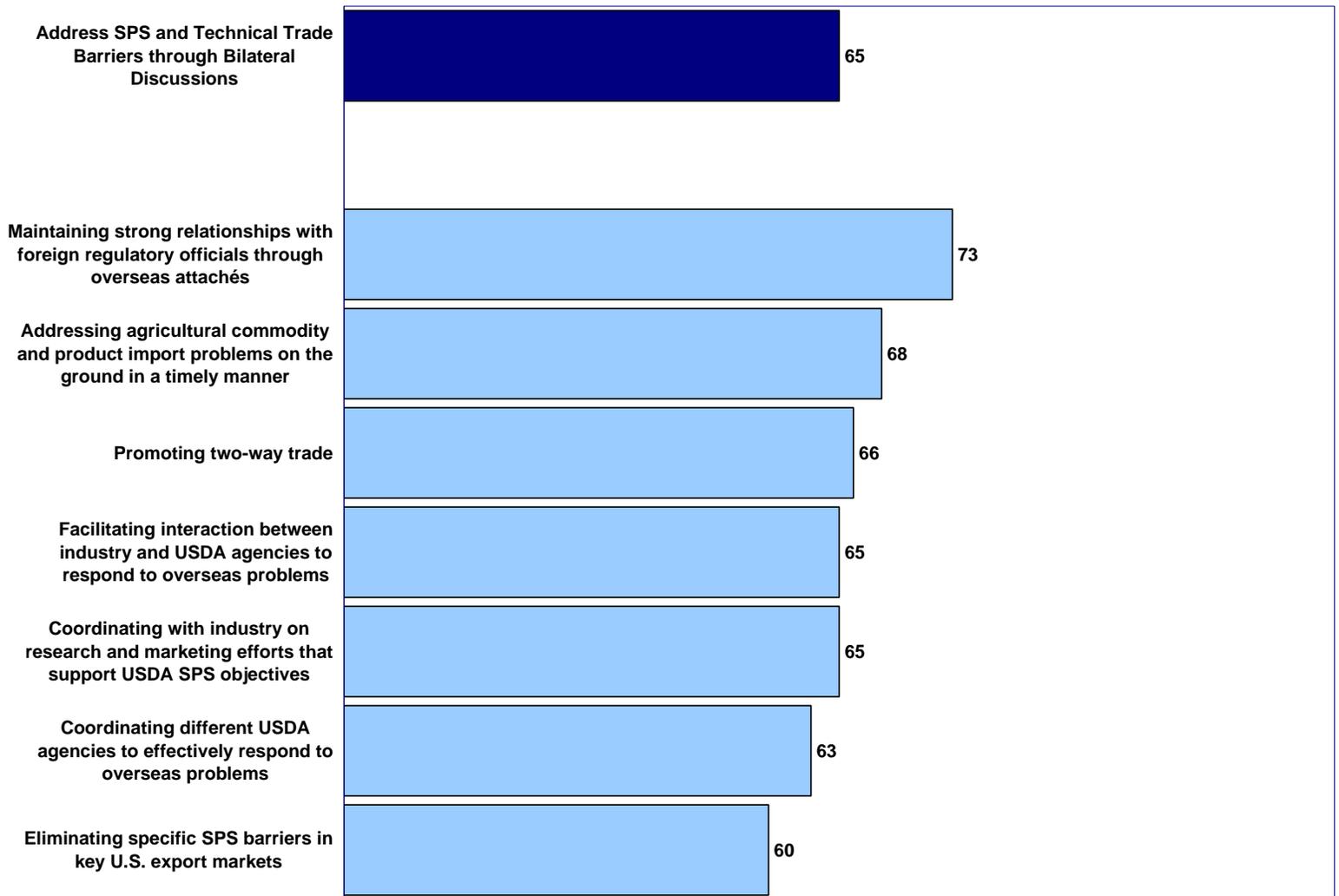
Monitor and Enforce International SPS Rules and TBT Agreement Commitments

Respondents rated the monitoring and enforcement of International SPS rules and TBT agreement commitments 61.



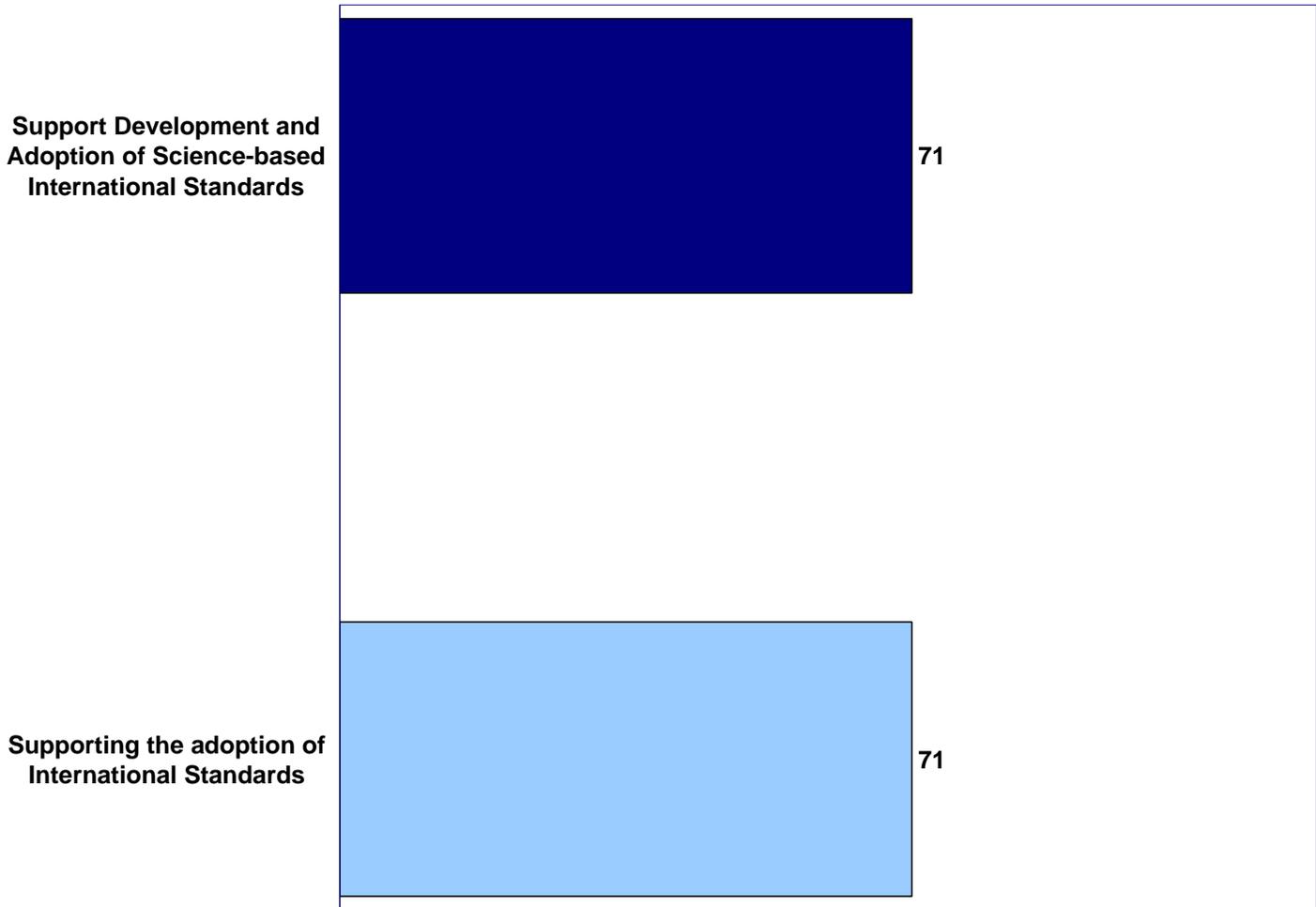
Address SPS and Technical Trade Barriers through Bilateral Discussions

Respondents felt that FAS performed relatively well in maintaining strong relationships with foreign regulatory officials through overseas attaches (73). Conversely, respondents felt the least positive about FAS eliminating specific SPS barriers in key U.S. export markets. There was not much variation among the ratings of other items addressing SPS and Technical Trade barriers through bilateral discussions. These items received relatively modest ratings in the range of 63 to 68.



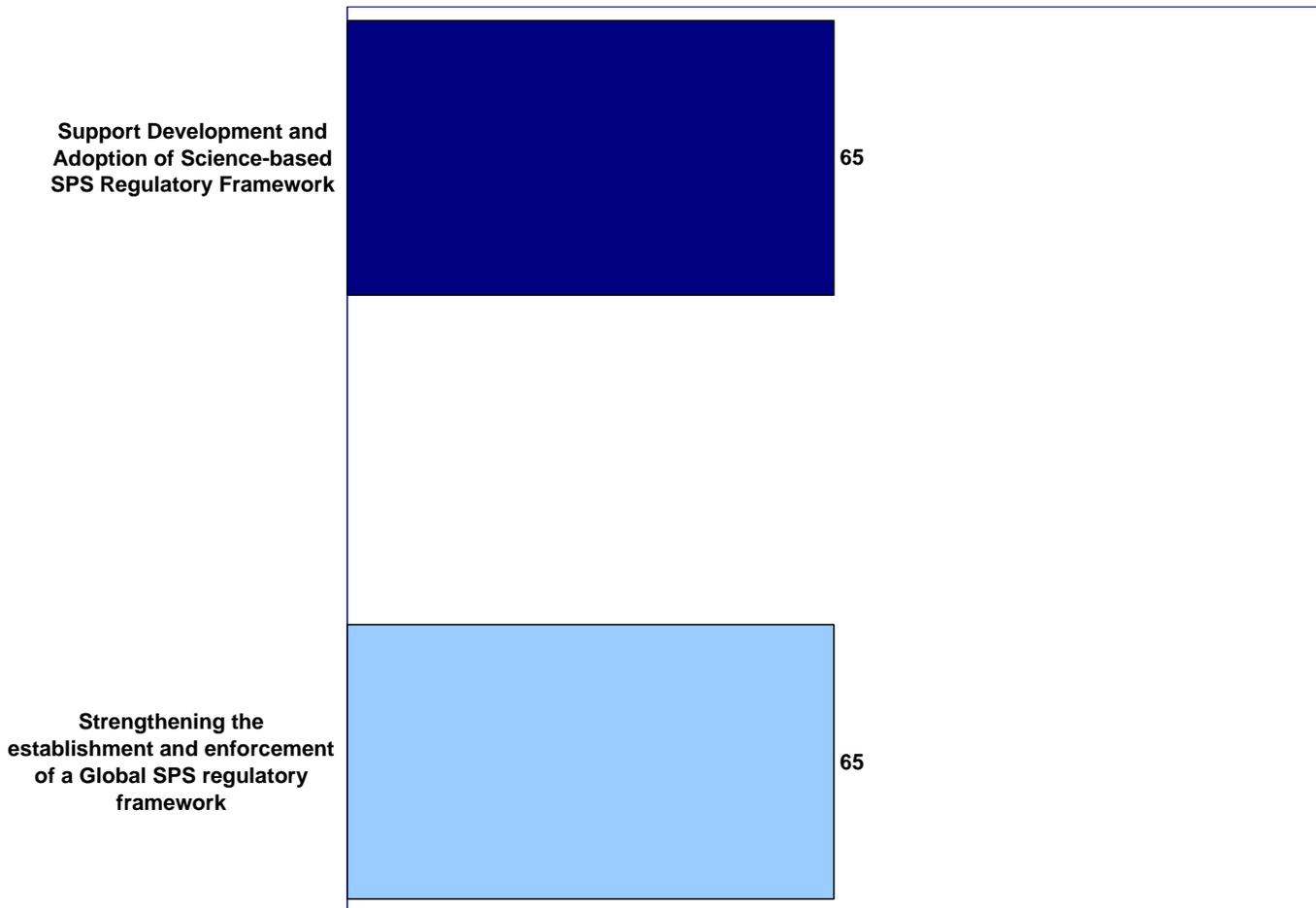
Support Development and Adoption of Science-based International Standards

The item support development and adoption of science-based international standards received a relatively positive rating of 71.



Support Development and Adoption of SPS Regulatory Framework

Respondents' ratings on the establishment and enforcement of a Global SPS regulatory framework (65) were in line with most items in the area of reducing technical trade barriers and restrictive SPS (Sanitary and Phytosanitary) measures.

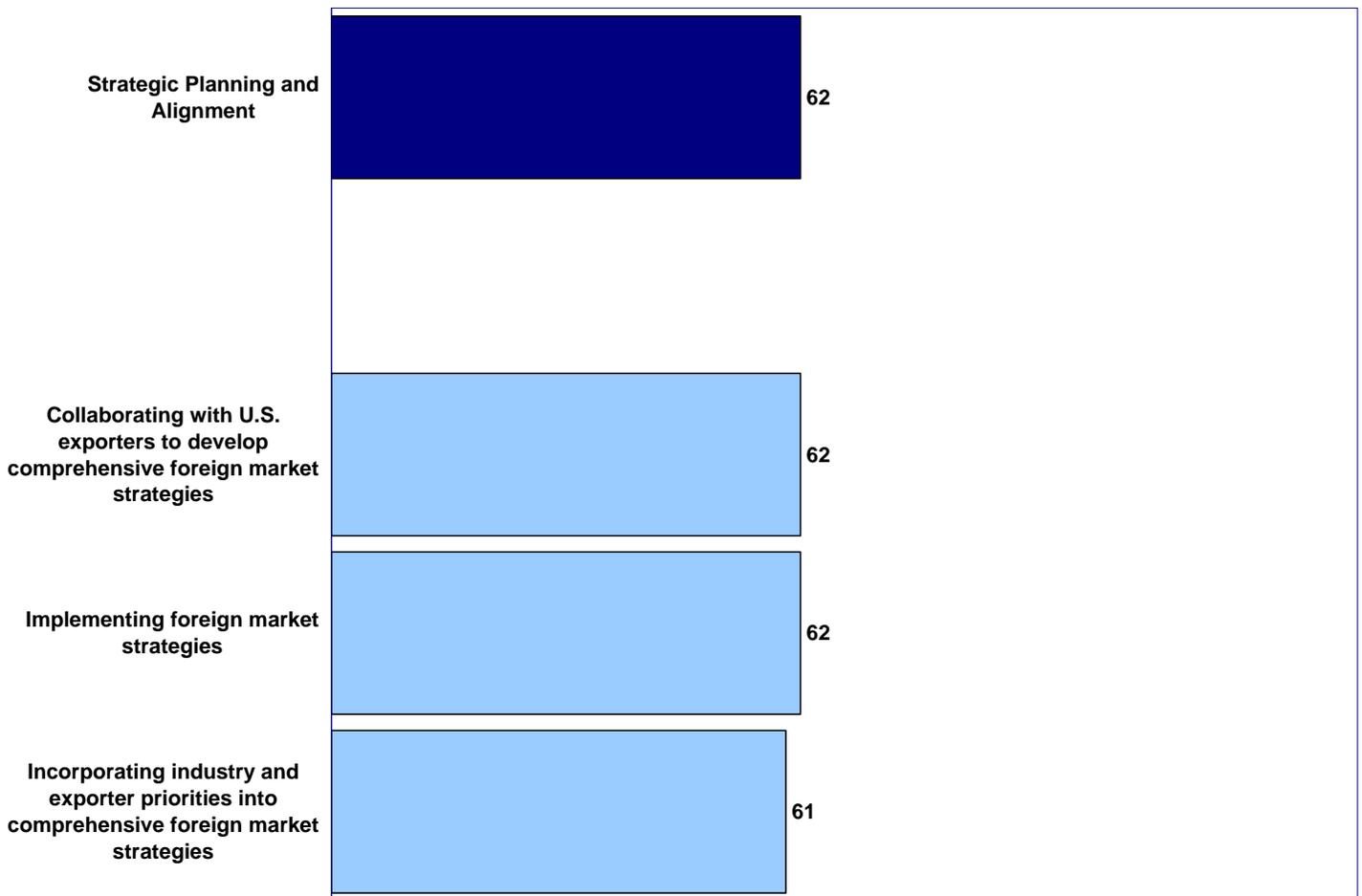


Management Initiatives

Management issues covered three areas: Strategic Planning and Alignment, Employee Recruitment and Development, and Operational Excellence. Unlike most of the program areas which had low or zero impact on satisfaction, Management Initiatives, in particular, Operational Excellence were found to have an impact on satisfaction. In addition to being a high-impact area, Operation Excellence was also the highest rated area.

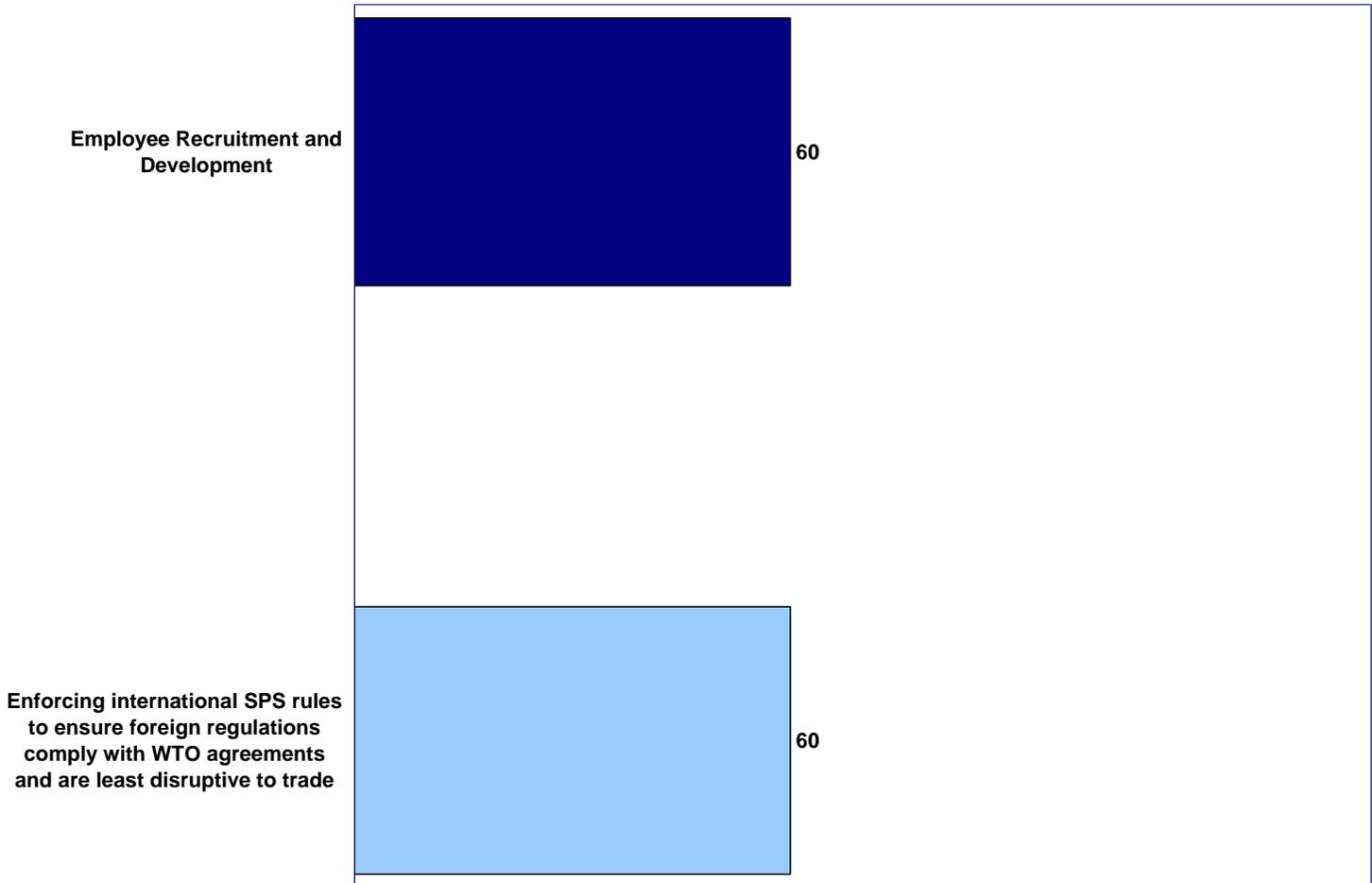
Strategic Planning and Alignment

Respondents rated FAS in the low 60s for the strategic planning and alignment areas. This includes collaborative efforts with U.S. exporters in developing a comprehensive foreign market strategy, incorporating industry and exporter priorities into comprehensive foreign market strategies as well as implementing these strategies.



Employee Recruitment and Development

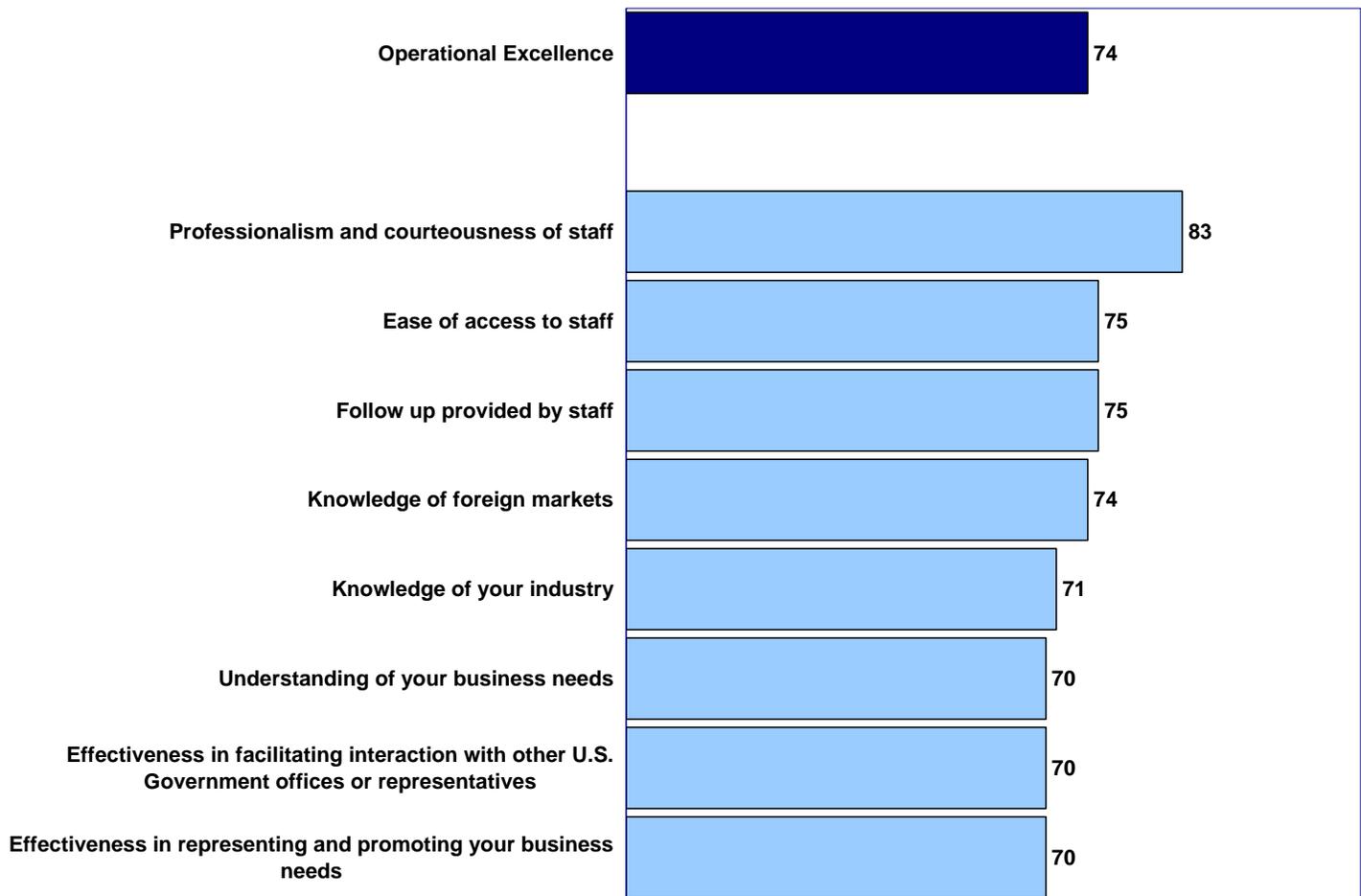
Employee recruitment and development was only rated 60. Respondents rated the single item enforcing international SPS rules to ensure foreign regulations comply with WTO agreements and are least disruptive to trade to evaluate the area of employee recruitment and development.



Operational Excellence

Operational excellence was not only the highest rated area of the survey, but also was found to have the highest impact on customer satisfaction with an impact of 1.8. No other area was found to have an impact higher than 0.5. Thus, FAS is performing the highest in the area that has the most leverage on customer satisfaction. While at 74, performance in this area is high relative to other areas; further improvements will yield a boost in satisfaction. As with an impact of 1.8, increasing performance in the area of operational excellence by five points will yield a nearly 2-point (1.8) increase in customer satisfaction. None of the Operational Excellence items were rated lower than 70.

Most respondents (88%) had contacted FAS recently. For those respondents, the highest rated area is professionalism and courteousness of staff (83). Staff received solid ratings for their accessibility and their follow up (with ratings of 75 in both areas). The staff was found to be relatively knowledgeable of foreign markets (74) and the respondents' industry (71). Facilitating interaction with other U.S. Government offices or representatives and representing and promoting the respondents' needs while scoring 70, may be opportunities to improve.



Outcomes

Foreign Agricultural Services measured two outcome events, reported below. Each outcome was measured with a single question.

Likelihood to use the Foreign Agricultural Service again in the future

Respondents were highly likely to use FAS again in the future. They rated their likeliness to use FAS in the future 87 on a scale of 0 to 100. Satisfaction with FAS impacted their likeliness to use FAS again in the future with an impact of 2.8. Thus, a five-point increase in satisfaction would result in a 2.8-point increase in the likelihood of using FAS again in the future.

Confident in the services will help meet business needs

Respondents were relatively confident in the services of FAS helping them meet their business needs with a rating of 74 on a scale of 0 to 100. Satisfaction has a high degree of impact on the confidence respondents have in the services of FAS with an impact of 4.4.

APPENDIX A: SURVEY QUESTIONNAIRE

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USDA Foreign Agricultural Service 2008 Customer Satisfaction Survey FINAL VERSION

Introduction

The USDA Foreign Agricultural Service (FAS) is interested in your feedback and how it can better improve its services to you. The survey questions will cover the three goals of FAS: Creating a level playing field for international trade; Expanding the global agricultural trading system; Reducing technical trade barriers and restrictive SPS (sanitary and phytosanitary) measures. Please take a few moments to respond to our survey, which is being administered by CFI Group, a third-party customer satisfaction research organization.

CFI Group will treat all information you provide as confidential. All information you provide will be combined with others' for research and reporting purposes. Your individual responses will not be released.

This survey will take approximately 15-20 minutes and is authorized by the Office of Management and Budget Control number 1505-0191.

Creating a level playing field for international trade

One of the main goals of FAS is to create a level playing field for U.S. producers and exporters in the international market.

Please rate how well FAS is doing in the following areas that aim to make the playing field level for U.S. producers and exporters. Use a scale from 1 to 10, where 1 means "Poor" and 10 means "Excellent." If you are not familiar with a particular item, or it does not apply to you, please answer "Not Applicable."

Eliminating Barriers

- Q1. Reducing tariffs to allow for better international market access for U.S. producers and exporters
- Q2. Addressing regulations such as sanitary, phytosanitary and technical regulations (such as labeling) that restrict trade expansion
- Q3. Eliminating barriers to trade through negotiation of trade agreements
- Q4. Incorporating U.S. producer and exporter priorities into trade agreements

Enforcing Trade Agreements

- Q5. Providing timely reporting and notifications on monitoring and enforcement activities related to international trade agreements
- Q6. Administering import quotas in an effective manner
- Q7. Providing information regarding trade agreement obligations in an open and transparent manner
- Q8. Implementing international dispute settlement decisions in a timely manner
- Q9. Representing U.S. agricultural interests in the World Trade Organization
- Q10. Enforcing existing trade agreements

Building International Support

- Q11. Developing strategic relationships with foreign governments
- Q12. Advancing issues and positions of U.S. producers and exporters through effective communication

- Q13. Ability of overseas FAS offices to intervene and resolve trade disruptions
 Q14. Building international support for U.S. producers and exporters
 Q15. Building international support in collaboration with U.S. partners, such as U.S. producers and exporters and U.S. Land Grant Colleges and Universities

Expanding the global agricultural trading system

Another goal of FAS is to expand the global agricultural trading system. Please rate how well FAS is doing in the following areas that aim to expand the global agricultural trading system for U.S. producers and exporters. Use a scale from 1 to 10, where 1 means "Poor" and 10 means "Excellent." If you are not familiar with a particular item, or it does not apply to you, please answer "Not Applicable."

Facilitate U.S. commercial trade through trade-related programs, information and overseas offices

- Q16. Facilitating the entry of U.S. companies into difficult-to-enter markets through FAS overseas offices
 Q17. Supporting the development of commercial markets in developing countries
 Q18. Initiating and supporting dialogue with U.S. agricultural product processing industry, producers and exporters
 Q19. FAS knowledge of global commodity markets
 Q20. Usefulness of FAS commodity and processed product market analysis to your operations
 Q21. Usefulness of international production estimates to your operations
 Q22. Market analysis supporting export expansion efforts
 Q23. Supporting agricultural export industry trade missions and trade teams
 Q24. Timeliness of the funding reimbursement under market development programs
 Q25. Effectiveness of the operations of the export credit guarantee or the market development programs

Build Trade Capacity in Developing Countries

- Q26. Building trade capacity in developing countries
 Q27. Using trade capacity building to further U.S. Government trade policy priorities
 Q28. Using trade capacity building to increase market access for U.S. producers and exporters

Supporting International Economic Development

- Q29. Contribution of agricultural reconstruction, stabilization and development activities to international economic development
 Q30. Contribution of country and regional strategies to international economic development
 Q31. Contribution of international bio-fuels initiative to international economic development
 Q32. Supporting international economic development

Reducing technical trade barriers and restrictive SPS (Sanitary and Phytosanitary) measures

Another goal of FAS is to reduce technical trade barriers and restrictive SPS measures. Please rate how well FAS is doing in the following areas that aim to reduce technical trade barriers and restrictive SPS measures. Use a scale from 1 to 10, where 1 means "Poor" and 10 means "Excellent." If you are not familiar with a particular item, or it does not apply to you, please answer "Not Applicable."

Monitor and Enforce International SPS rules and TBT Agreement Commitments

- Q33. Enforcing international SPS rules to ensure foreign regulations comply with WTO agreements and are least disruptive to trade

Address SPS and Technical Trade Barriers through Bilateral Discussions

- Q34. Eliminating specific SPS barriers in key U.S. export markets
- Q35. Maintaining strong relationships with foreign regulatory officials through overseas attachés
- Q36. Addressing agricultural commodity and product import problems on the ground in a timely manner
- Q37. Coordinating different USDA agencies to effectively respond to overseas problems
- Q38. Facilitating interaction between industry and USDA agencies to respond to overseas problems
- Q39. Coordinating with industry on research and marketing efforts that support USDA SPS objectives
- Q40. Promoting two-way trade

Support Development and Adoption of Science-based International Standards

- Q41. Supporting the adoption of International Standards

Support Development and Adoption of Science-based SPS Regulatory Framework

- Q42. Strengthening the establishment and enforcement of a Global SPS regulatory framework

Management Initiatives

Effective management is fundamental to accomplishing the Agency's strategic goals. Please rate how well FAS in doing in the following areas that aim to improve FAS administrative operations. Use a scale from 1 to 10, where 1 means "Poor" and 10 means "Excellent." If you are not familiar with a particular item, or it does not apply to you, please answer "Not Applicable."

Strategic Planning and Alignment

- Q43. Collaborating with U.S. exporters to develop comprehensive foreign market strategies
- Q44. Incorporating industry and exporter priorities into comprehensive foreign market strategies
- Q45. Implementing foreign market strategies

Operational Excellence

- Q46. Have you contacted FAS staff recently (e.g. in the past year)?
 1. Yes (Continue to intro before Q48)
 2. No (Skip to Q56)
 3. Don't Know (Skip to Q56)

Please rate the FAS staff on the following areas. Use a scale from 1 to 10, where 1 means "Poor" and 10 means "Excellent." If you are not familiar with a particular item, or it does not apply to you please answer "Not Applicable."

- Q47. Ease of access to staff
- Q48. Professionalism and courteousness of staff
- Q49. Knowledge of your industry
- Q50. Understanding of your business needs
- Q51. Knowledge of foreign markets
- Q52. Effectiveness in facilitating interaction with other U.S. Government offices or representatives
- Q53. Effectiveness in representing and promoting your business needs
- Q54. Follow up provided by staff

American Customer Satisfaction Index Questions

Q55. First, please consider your overall experiences with the USDA Foreign Agricultural Service. Using a 10-point scale on which "1" means "Very dissatisfied" and "10" means "Very satisfied," how satisfied are you with the Foreign Agricultural Service?

Q56. To what extent has the Foreign Agricultural Service met your expectations? Please use a 10-point scale on which "1" now means "Not met your expectations" and "10" means, "Exceeds your expectations."

Q57. Forget about the Foreign Agricultural Service for a moment. Now, imagine the ideal organization that works to improve foreign market access and the competitive position of U.S. agriculture in the global marketplace, and provides food aid and technical assistance to foreign countries.

How well does the Foreign Agricultural Service compare with that ideal? Please use a 10-point scale on which "1" means "Not very close to the ideal" and "10" means "Very close to the ideal."

Open-end Comment

Q58. How can the Foreign Agricultural Service provide you with better service? Please provide any additional comments about USDA Foreign Agricultural Service.

Outcomes

Q59. How likely are you to use the Foreign Agricultural Service again in the future if you need a similar service? Please use a 10-point scale where "1" is "Not very likely" and "10" is "Very likely."

Q60. How confident are you in the services that the Foreign Agricultural Service will provide you with help to meet your business needs? Please use a 10-point scale where "1" is "Not very confident" and "10" is "Very confident."

Closing

Thank you for taking the time to participate in this survey. USDA Foreign Agricultural Service appreciates your input.

APPENDIX B: AGGREGATE RESULTS TABLE

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Aggregate Scores

	Score	Total Impact
Eliminating Barriers	64	0.0
Reducing tariffs to allow for better international market access for U.S. producers and exporters	58	
Addressing regulations such as sanitary, phytosanitary and technical regulations (such as labeling) that restrict trade expansion	64	
Eliminating barriers to trade through negotiation of trade agreements	63	
Incorporating U.S. producer and exporter priorities into trade agreements	66	
Enforcing Trade Agreements	66	0.0
Providing timely reporting and notifications on monitoring and enforcement activities related to international trade agreements	66	
Administering import quotas in an effective manner	64	
Providing information regarding trade agreement obligations in an open and transparent manner	67	
Implementing international dispute settlement decisions in a timely manner	58	
Representing U.S. agricultural interests in the World Trade Organization	71	
Enforcing existing trade agreements	61	
Building International Support	65	0.5
Developing strategic relationships with foreign governments	67	
Advancing issues and positions of U.S. producers and exporters through effective communication	65	
Ability of overseas FAS offices to intervene and resolve trade disruptions	69	
Building international support for U.S. producers and exporters	64	
Building international support in collaboration with U.S. partners, such as U.S. producers and exporters and U.S. Land Grant Colleges and Universities	65	
Facilitate U.S. Commercial Trade	69	0.3
Facilitating the entry of U.S. companies into difficult-to-enter markets through FAS overseas offices	67	
Supporting the development of commercial markets in developing countries	66	
Initiating and supporting dialogue with U.S. agricultural product processing industry, producers and exporters	67	
FAS knowledge of global commodity markets	73	
Usefulness of FAS commodity and processed product market analysis to your operations	66	
Usefulness of international production estimates to your operations	69	
Market analysis supporting export expansion efforts	67	
Supporting agricultural export industry trade missions and trade teams	75	
Timeliness of the funding reimbursement under market development programs	69	
Effectiveness of the operations of the export credit guarantee or the market development programs	68	
Build Trade Capacity in Developing Countries	60	0.0
Building trade capacity in developing countries	60	
Using trade capacity building to further U.S. Government trade policy priorities	60	
Using trade capacity building to increase market access for U.S. producers and exporters	61	
Supporting International Economic Development	60	0.0
Contribution of agricultural reconstruction, stabilization and development activities to international economic development	60	
Contribution of country and regional strategies to international economic development	59	
Contribution of international bio-fuels initiative to international economic development	48	
Supporting international economic development	64	
Monitor and Enforce International SPS Rules and TBT Agreement Commitments	61	0.0
Enforcing international SPS rules to ensure foreign regulations comply with WTO agreements and are least disruptive to trade	61	
Sample Size		117

Aggregate Scores (cont.)

	Score	Total Impact
Address SPS and Technical Trade Barriers through Bilateral Discussions	65	0.4
Eliminating specific SPS barriers in key U.S. export markets	60	
Maintaining strong relationships with foreign regulatory officials through overseas attachés	73	
Addressing agricultural commodity and product import problems on the ground in a timely manner	68	
Coordinating different USDA agencies to effectively respond to overseas problems	63	
Facilitating interaction between industry and USDA agencies to respond to overseas problems	65	
Coordinating with industry on research and marketing efforts that support USDA SPS objectives	65	
Promoting two-way trade	66	
Support Development and Adoption of Science-based International Standards	71	0.0
Supporting the adoption of International Standards	71	
Support Development and Adoption of Science-based SPS Regulatory Framework	65	0.0
Strengthening the establishment and enforcement of a Global SPS regulatory framework	65	
Strategic Planning and Alignment	62	0.2
Collaborating with U.S. exporters to develop comprehensive foreign market strategies	62	
Incorporating industry and exporter priorities into comprehensive foreign market strategies	61	
Implementing foreign market strategies	62	
Employee Recruitment and Development	60	0.2
Enforcing international SPS rules to ensure foreign regulations comply with WTO agreements and are least disruptive to trade	60	
Operational Excellence	74	1.8
Contacted FAS staff recently	88%	
Ease of access to staff	75	
Professionalism and courteousness of staff	83	
Knowledge of your industry	71	
Understanding of your business needs	70	
Knowledge of foreign markets	74	
Effectiveness in facilitating interaction with other U.S. Government offices or representatives	70	
Effectiveness in representing and promoting your business needs	70	
Follow up provided by staff	75	
Customer Satisfaction	70	--
Overall satisfaction	74	
Compared to expectations	71	
Compared to the ideal	63	
Likelihood to Use in the Future	87	2.8
Likelihood to use in the future	87	
Confidence in Services	74	4.4
Confident in services	74	
Sample Size	117	

Commodity Interest Stakeholder compared to Other

	Commodity Interest Stakeholders	Other	Significant Difference
Eliminating Barriers	65	61	
Reducing tariffs to allow for better international market access for U.S. producers and exporters	60	52	
Addressing regulations such as sanitary, phytosanitary and technical regulations (such as labeling) that restrict trade expansion	65	62	
Eliminating barriers to trade through negotiation of trade agreements	65	58	
Incorporating U.S. producer and exporter priorities into trade agreements	69	59	✓
Enforcing Trade Agreements	66	65	
Providing timely reporting and notifications on monitoring and enforcement activities related to international trade agreements	67	61	
Administering import quotas in an effective manner	65	63	
Providing information regarding trade agreement obligations in an open and transparent manner	68	61	
Implementing international dispute settlement decisions in a timely manner	60	53	
Representing U.S. agricultural interests in the World Trade Organization	74	62	✓
Enforcing existing trade agreements	61	59	
Building International Support	69	58	✓
Developing strategic relationships with foreign governments	69	61	
Advancing issues and positions of U.S. producers and exporters through effective communication	68	59	
Ability of overseas FAS offices to intervene and resolve trade disruptions	71	57	✓
Building international support for U.S. producers and exporters	68	55	✓
Building international support in collaboration with U.S. partners, such as U.S. producers and exporters and U.S. Land Grant Colleges and Universities	68	60	
Facilitate U.S. Commercial Trade	70	67	
Facilitating the entry of U.S. companies into difficult-to-enter markets through FAS overseas offices	68	61	
Supporting the development of commercial markets in developing countries	67	63	
Initiating and supporting dialogue with U.S. agricultural product processing industry, producers and exporters	70	65	
FAS knowledge of global commodity markets	75	69	
Usefulness of FAS commodity and processed product market analysis to your operations	67	66	
Usefulness of international production estimates to your operations	68	75	
Market analysis supporting export expansion efforts	68	64	
Supporting agricultural export industry trade missions and trade teams	78	69	✓
Timeliness of the funding reimbursement under market development programs	71	62	
Effectiveness of the operations of the export credit guarantee or the market development programs	71	53	✓
Build Trade Capacity in Developing Countries	62	56	
Building trade capacity in developing countries	63	54	
Using trade capacity building to further U.S. Government trade policy priorities	61	57	
Using trade capacity building to increase market access for U.S. producers and exporters	64	56	
Supporting International Economic Development	60	62	
Contribution of agricultural reconstruction, stabilization and development activities to international economic development	58	63	
Contribution of country and regional strategies to international economic development	61	56	
Contribution of international bio-fuels initiative to international economic development	48	55	
Supporting international economic development	64	67	
Sample Size	77	31	

Commodity Interest Stakeholder compared to Other (cont.)

	Commodity Interest Stakeholders	Other	Significant Difference
Supporting international economic development	64	67	
Monitor and Enforce International SPS Rules and TBT Agreement Commitments	62	56	
Enforcing international SPS rules to ensure foreign regulations comply with WTO agreements and are least disruptive to trade	62	56	
Address SPS and Technical Trade Barriers through Bilateral Discussions	68	58	
Eliminating specific SPS barriers in key U.S. export markets	62	54	
Maintaining strong relationships with foreign regulatory officials through overseas attachés	75	64	
Addressing agricultural commodity and product import problems on the ground in a timely manner	71	58	✓
Coordinating different USDA agencies to effectively respond to overseas problems	66	56	
Facilitating interaction between industry and USDA agencies to respond to overseas problems	67	58	
Coordinating with industry on research and marketing efforts that support USDA SPS objectives	67	56	
Promoting two-way trade	69	58	
Support Development and Adoption of Science-based International Standards	72	66	
Supporting the adoption of International Standards	72	66	
Support Development and Adoption of Science-based SPS Regulatory Framework	66	57	
Strengthening the establishment and enforcement of a Global SPS regulatory framework	66	57	
Strategic Planning and Alignment	64	53	
Collaborating with U.S. exporters to develop comprehensive foreign market strategies	64	54	
Incorporating industry and exporter priorities into comprehensive foreign market strategies	64	52	
Implementing foreign market strategies	65	47	✓
Employee Recruitment and Development	61	56	
Enforcing international SPS rules to ensure foreign regulations comply with WTO agreements and are least disruptive to trade	61	56	
Operational Excellence	77	68	✓
Contacted FAS staff recently	91%	84%	
Ease of access to staff	79	68	✓
Professionalism and courteousness of staff	87	76	✓
Knowledge of your industry	73	69	
Understanding of your business needs	72	67	
Knowledge of foreign markets	76	69	
Effectiveness in facilitating interaction with other U.S. Government offices or representatives	74	58	✓
Effectiveness in representing and promoting your business needs	73	62	
Follow up provided by staff	79	63	✓
Customer Satisfaction	72	65	
Overall satisfaction	77	67	✓
Compared to expectations	73	66	
Compared to the ideal	64	61	
Likelihood to Use in the Future	91	83	✓
Likelihood to use in the future	91	83	✓
Confidence in Services	77	69	
Confident in services	77	69	
Sample Size	77	31	

APPENDIX C: VERBATIM COMMENTS

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