

November 2009

Ofcom



Consumer Complaints Market Research Report

Contents

Executive Summary	3
1.1 Introduction	3
1.2 Methodology and Sample	3
1.3 Key findings	4
Background and objectives	8
2.1 Background	8
2.2 Objectives	8
Awareness and usage of telecommunications ADR schemes	10
3.1 Awareness of telecommunications ADR schemes	10
3.2 Awareness of Complaints Code of Practice	13
3.3 Complaints to telecommunications service providers	14
3.4 Telecommunications ADR scheme eligibility	20
3.5 Telecommunications ADR scheme usage	22
3.6 Profile of telecommunications ADR users	25
Outcome and experience of telecommunications ADR schemes	27
4.1 Outcome of telecommunications ADR schemes	27
4.2 Perceived time and cost involved in telecommunications complaint process	29
4.3 Satisfaction with telecommunications complaint process	30
4.4 Levels of worry, stress & anger experienced during telecommunications complaint process	32
4.5 Satisfaction with telecommunications ADR scheme itself	35
4.6 Actions taken as a result of the telecommunications complaint process	37
Impact of ADR awareness on satisfaction	38
ADR preferences	41
6.1 When provider should inform about telecommunications ADR schemes	41
6.2 How provider should inform about telecommunications ADR schemes	42
The consumer experience of long-lasting complaints	43
7.1 Differences in nature of complaints	43
7.2 Complaint experience	43
Annex.....	45
Annex A - Methodology	45
Annex B - Questionnaires	47

Section 1

Executive Summary

1.1 Introduction

This report contains the findings from a programme of quantitative research conducted by Synovate on behalf of Ofcom during August 2009. The aim of this programme of research was to provide Ofcom with a better understanding of the consumer experience of making a complaint to a telecommunications provider, levels of awareness, usage and experience of the Alternative Dispute Resolution (ADR) process for telecommunications services among both residential and small business audiences.

1.2 Methodology and Sample

Note: We use the term 'eligible non-user' for complaints that last 12 weeks that do not go to ADR. We recognise however, that the subject matter of some complaints means that even though they may have lasted 12 weeks, they may not be able to go to ADR.

The research programme comprised two distinct components.

1.2.1 Custom Quantitative Research

Quantitative research was undertaken 14-31 August, 2009 among 1,044 consumers¹ and 861 small businesses (defined as having between 1-10 employees) who had complained to a telecommunications service provider in the last 12 months.

The main purpose of this component of the research programme was to understand users' experience of and satisfaction with telecommunications ADR schemes and to benchmark this against the experience and satisfaction of eligible non-users and other complainants. Online panels were used to target this difficult to find group and the research was completed online via a self-completion methodology. Due to the self-completion methodology and exclusion of eligible people who do not have online access, it is not possible to say the sample is representative of all people who raised or are eligible to raise an issue with a ADR body. However, sufficiently large subsamples of people raising a telecoms, broadband or mobile issue were achieved to allow significant differences in these groups to be identified.

¹ Throughout the report, the term 'consumers' refers to 'residential consumers'.

1.2.2 Omnibus Research

Questions were placed on BMRB's Face-to-Face Omnibus 20-26 August 2009. The sample comprised 963 nationally representative Great Britain adults aged 18+.

The main purpose of this component of the research programme was to generate an accurate measure of ADR awareness and usage for telecommunications services and benchmark this against ADR schemes in similar industries.

1.3 Key findings

1.3.1 Overview of findings

Telecommunications ADR schemes have a positive impact on the outcome of complaints, on satisfaction with the complaint process itself and on satisfaction with provider performance during the complaint. However, awareness of ADR schemes is confined to a minority of the public and is only marginally higher among eligible non-users.

- Telecommunications ADR scheme users are significantly more likely than eligible non-users to have their complaint at least partly resolved and they are also significantly more likely to be satisfied with the outcome.
- There also appears to be a correlation between awareness of ADR (as distinct from usage) and consumer satisfaction with the outcome of a complaint, with those who are aware of ADR much less likely to experience extreme levels of dissatisfaction with the outcome of their complaint.
- Public awareness of telecommunications ADR schemes is significantly lower than schemes in similar industries (and no higher among eligible residential and business non-users) – this is despite the higher volume of complaints generated by the telecommunications industry. 8% of the public are aware of ADR schemes and awareness rises to 23% of consumers that are eligible to use an ADR scheme..
- A significant proportion of complaints to telecommunications providers are not resolved within 12 weeks (30%). Consumers with long-lasting complaints are much more likely to have a very negative experience, including higher levels of stress/worry/anger and higher financial costs.

1.3.2 Awareness and usage of telecommunications ADR schemes

There is low awareness of telecommunications ADR schemes but usage is at a comparable level to similar industries. This is possibly due to the higher volume of complaints raised in relation to telecommunications services.

- 8% of GB adults are aware of telecommunications ADR schemes – a figure that is significantly lower than for equivalent bodies in similar industries.
- Awareness of telecommunications ADR schemes is higher among complainants to telecoms companies (15%) than among the population generally. This awareness level increases to 23% of complainants whose complaint has not been resolved within 12 weeks.
- Third parties like Ofcom play a key role in informing telecommunications ADR users about the scheme.
- 23% of consumers have complained to one of their telecommunications service providers in the last 12 months, which is almost twice as many as have complained to an energy service provider.
- 12% of telecommunications complaints lasting 12+ weeks result in an ADR scheme.
- ADR users are also much more likely to be aware of their provider's Complaints Code of Practice and to have actually read it.

Telecommunications ADR scheme users have a distinctive profile:

- Younger consumers (18-34 year olds) and males are significantly more likely to take their complaints to an ADR scheme.
- Sole trader businesses are significantly less likely to take advantage of ADR schemes than businesses with between 6-10 employees.
- 'Over-charging / incorrect billing' is the most popular reason consumers complain generally and is even more likely to be the reason in cases that result in ADR schemes – for both mobile and landline complaints. Other major complaints such as 'handset problems' are more likely to be resolved within 12 weeks.
- 'Over-charging / incorrect billing' is also a key factor in broadband complaints, however it is 'slow connection speed' that is most likely to drive complaints generally (including ADR).

1.3.3 Outcome and experience of telecommunications ADR schemes

Telecommunications ADR schemes appear to succeed in getting long-standing telecommunications disputes resolved but they do not reduce the time involvement for the complainant:

- 87% of consumer telecommunications ADR users and 83% of business telecommunications ADR users perceive their complaint to be at least 'partly resolved' and this compares very favourably to eligible non-users whose complaints remain unresolved in over 40% of cases.
- Most consumers and businesses whose complaints last 12+ weeks do not have their complaint resolved by the first person they speak to when they contact their provider. In significant numbers of cases, complainants perceive that the provider has not responded appropriately to their initial complaint. ADR users expend similar time pursuing their complaint as eligible non-users. When it comes to money spent pursuing their complaint, consumer ADR users spend more than eligible non-users whereas business ADR users spend less.

Telecommunications ADR schemes have a positive impact on complainants' experiences during long-standing issues:

- Consumers and small businesses using telecommunications ADR schemes are significantly more satisfied with the outcome of their complaint than eligible non-users and this applies irrespective of the outcome of the complaint.
- ADR users are also significantly more positive than eligible non-users about their provider's performance during the complaint.
- Going to ADR significantly reduces the prospect of complainants being very angry and very stressed, and slightly reduces the chance of being very worried.
- Feedback from ADR users on the scheme itself is broadly positive but with scope for improvement.

1.3.4 ADR preferences

Those with long-standing complaints wish to be informed about ADR schemes by their provider early in the complaint process but there is no consensus on the favoured method of being informed:

- When informed about ADR schemes, most non-users express a desire to be informed about them by their provider and approximately half wish to be informed at the time they

make their original complaint. Relatively few are prepared to wait longer than one month to be informed.

- There is no consensus on the favoured method of being informed about ADR schemes; letters, bills, email and telephone calls are all favoured by significant numbers of consumers and small businesses.

1.3.5 The consumer experience of long-lasting complaints

Most complaints to telecommunications service providers are resolved quite quickly (70% within 12 weeks). But for those that aren't resolved within 12 weeks, complainants are much more likely to experience detriment. These complainants:

- Are less likely to be informed about the process and less likely to be able to get their provider to recognise they are making a complaint.
- Spend more time trying to resolve the complaint (consumers claim to spend 10-14 hours actively pursuing complaints that take 12 weeks to resolve, compared with 3-6 hours for complaints resolved quickly).
- Incur greater direct costs (average costs incurred are between £100-200 for such complaints, compared with approximately £60 for complaints resolved quickly).
- Are much more likely to experience higher levels of stress, worry, and anger.

Section 2

Background and objectives

2.1 Background

Ofcom has a duty under the Communications Act to set regulation where appropriate for Communication Providers' complaints handling procedures and Alternative Dispute Resolution (ADR).

ADR is designed to help resolve disputes between individual consumers or small businesses and their service provider through one of the two accredited ADR schemes, Otelo or CISAS. In the first instance the complainant needs to pursue a complaint with the service provider. If the complainant has either received a deadlock letter from their provider or the dispute has lasted more than 12 weeks² (but less than 9 months) they can refer the complaint to one of the accredited ADR schemes.

Ofcom has conducted research to better understand the consumer experience of the complaints handling process, levels of awareness, usage and experience of the ADR process for telecommunications services among residential customers and small business complainants.

2.2 Objectives

The specific objectives for this research are as follows:

- To better understand the experience of telecommunications consumers who make a complaint to their provider
- To gauge levels of awareness and use of ADR schemes generally and among customers who complain to their mobile, fixed telephony or broadband service providers
- To measure the outcome of the complaint/satisfaction with the ADR process among those who have used an ADR scheme, as well as the outcome/satisfaction for those consumers who are aware of one of the schemes.
- To benchmark the outcome/satisfaction of ADR users against eligible non-users (and against those whose complaints are resolved more quickly)

² Since the survey was undertaken this 12 week period has been reduced to 8 weeks.

- To measure the impact that prolonged complaints have on complainants and ascertain what they do as a consequence
- To understand when and how those unaware of ADR schemes would prefer to be informed about them

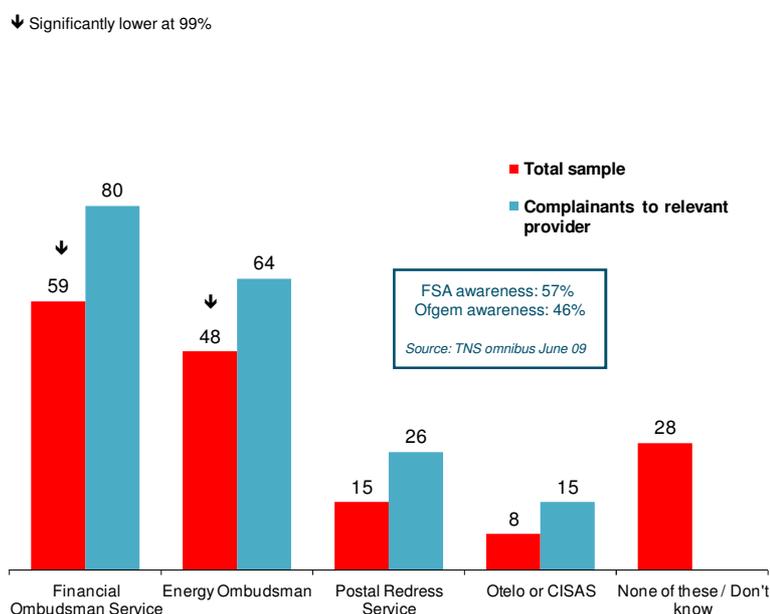
Section 3

Awareness and usage of telecommunications ADR schemes

3.1 Awareness of telecommunications ADR schemes

From the Omnibus survey, we can see that the GB public is significantly less aware of telecommunications ADR schemes than it is of other official dispute resolution bodies (Figure 3.1 below). When prompted, 8% had heard of Otelo or CISAS (which were described to participants as being ‘the official dispute resolution schemes for mobile phone, landline phone and broadband services’) compared with 59% for the Financial Ombudsman Service (‘the official dispute resolution scheme for financial services’), 48% for the Energy Ombudsman (‘the official dispute resolution scheme for gas and electricity services’) and 15% for the Postal Redress Service (‘the official dispute resolution scheme for postal services’).

Figure 3.1 Awareness of official dispute resolution bodies



Q4 A number of official bodies exist to provide services to people whose complaints to service providers cannot be resolved satisfactorily. Complaints can be taken to these official bodies for two reasons; because the service provider considers that the complaint cannot be resolved or because a defined period of time has passed since the complaint was originally made to the service provider. Which of these official bodies have you previously heard of?

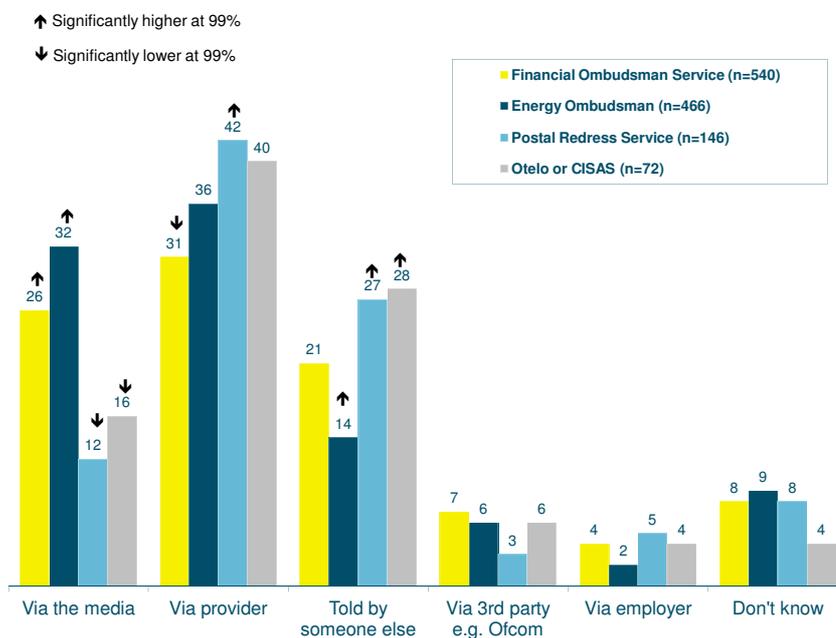
Base: All respondents (963)

The Omnibus survey also shows that awareness of ADR schemes is higher among complainants than among the general public (blue bars in Figure 3,1): 15% of consumers who made a complaint to a telecoms provider had heard of Otelo or CISAS compared with 8% of the general public

Awareness of CISAS/Otelo further increases to 23%, amongst those complainants whose complaint had not been resolved after 12 weeks. Due to limitations with sample sizes, we cannot provide awareness levels amongst eligible complainants in the other sectors.

Figures from the Omnibus survey (Figure 3.2 below) show that 40% of consumers who have heard of Otelo or CISAS first heard about them via their provider, 28% were told by someone else (friend, family or colleague), 16% heard via the media and 6% via a third party such as Ofcom or the Citizens' Advice Bureau. This is a similar pattern of response to the Postal Redress Service but differs somewhat from the Financial Ombudsman Service and Energy Ombudsman which are both relatively more likely to come to consumers' attention via media sources.

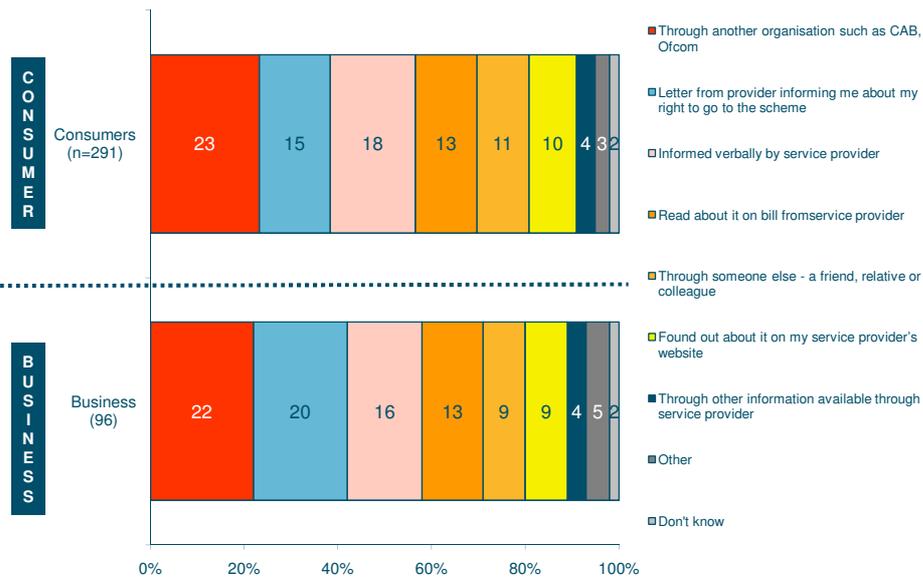
Figure 3.2 How first heard about official bodies (aggregated mentions)



Q5 Can you recall how you first heard about the ... ?

The Custom Quantitative survey provides evidence in Figure 3.3 (below) that third party organisations like Ofcom and CAB are much more influential in raising awareness of ADR schemes among actual users. 23% of consumer ADR users and 22% of business ADR users respectively cited 3rd parties as being how they first heard about the scheme they used.

Figure 3.3 How ADR users first heard about ADR scheme

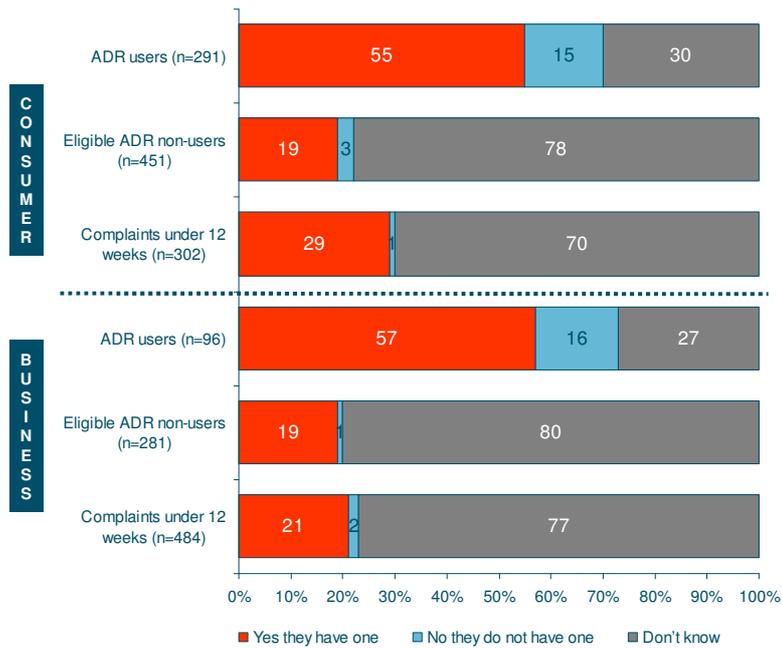


Q8 Can you recall how you first heard about this scheme?

3.2 Awareness of Complaints Code of Practice

The Custom Quantitative survey also shows in Figure 3.4 that ADR users (both among consumers and small businesses) are much more likely to be aware of their provider's Complaints Code of Practice (more than half of ADR users compared to about one fifth of eligible complainants).

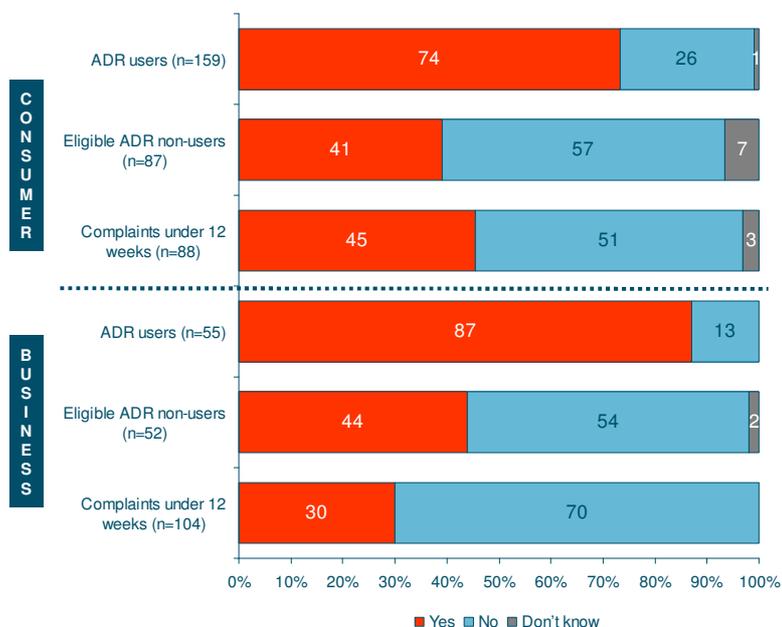
Figure 3.4 Awareness of provider's Complaints Code of Practice



Q29 Do you know whether your provider has a Complaints Code of Practice?

Figure 3.5 shows that among those who are aware of their provider’s Complaints Code of Practice, ADR users are also much more likely to have actually read it (74% among consumers and 87% among businesses).

Figure 3.5 Whether read provider’s Complaints Code of Practice



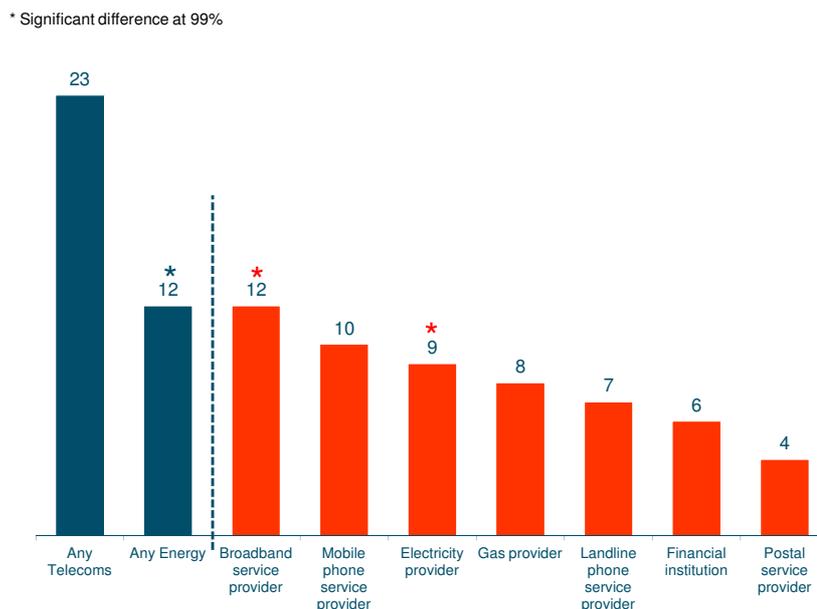
Q30 Have you read your provider’s Complaints Code of Practice?
 Base: Those aware of provider’s Complaints Code of Practice

3.3 Complaints to telecommunications service providers

From the Omnibus survey, we know that 23% of the GB public have complained³ to at least one of their telecommunications providers in the last 12 months (Figure 3.6 below). This is significantly higher than complaints to energy providers in the same time period (11%). Broadband service providers receive the highest level of complaints (12%), followed by mobile phone service providers (10%) with complaints to landline service providers significantly lower at 7%. By comparison, 6% of the public had complained to a financial institution in the last 12 months and 4% had complained about postal services during this period.

³ A complaint was defined as “an expression of dissatisfaction made to a service provider related to its products or services, or the complaints-handling process itself, where a response or resolution is expected”.

Figure 3.6 Complaints made to service providers in last 12 months amongst the general population

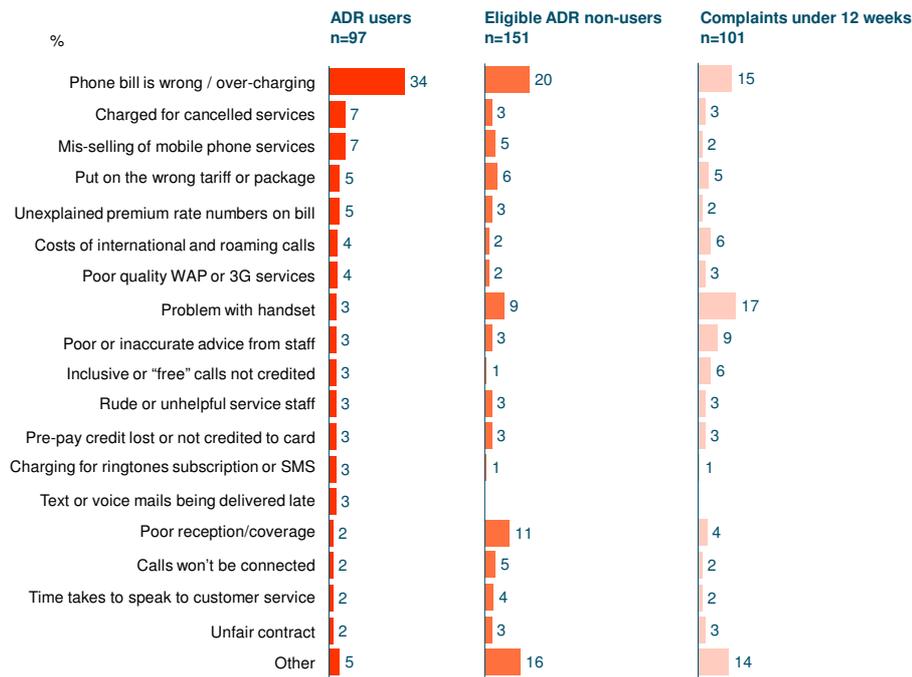


Q1 Have you made a complaint to any of these types of service providers in the last year? This could be a current, ongoing complaint or one that has already been resolved.

Base: All respondents (963)

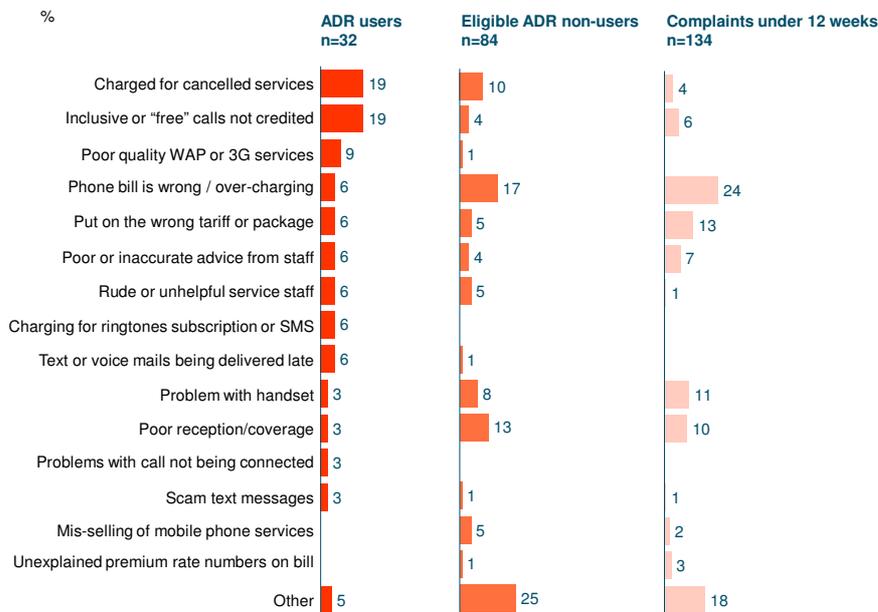
The Custom Quantitative survey informs us in Figures 3.7 and 3.8 that the most common complaints to mobile phone service providers concern “phone bill is wrong / over-charging”: 20% among consumers (rising to 34% among ADR users) and 17% among small businesses. Small businesses’ complaints to mobile phone service providers referred to ADR schemes are more likely to concern “changed for cancelled services” (19%) and “inclusive or free calls not credited” (19%).

Figure 3.7 Nature of complaint to mobile phone provider – CONSUMER



Q10 What was the nature of your complaint to your provider? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

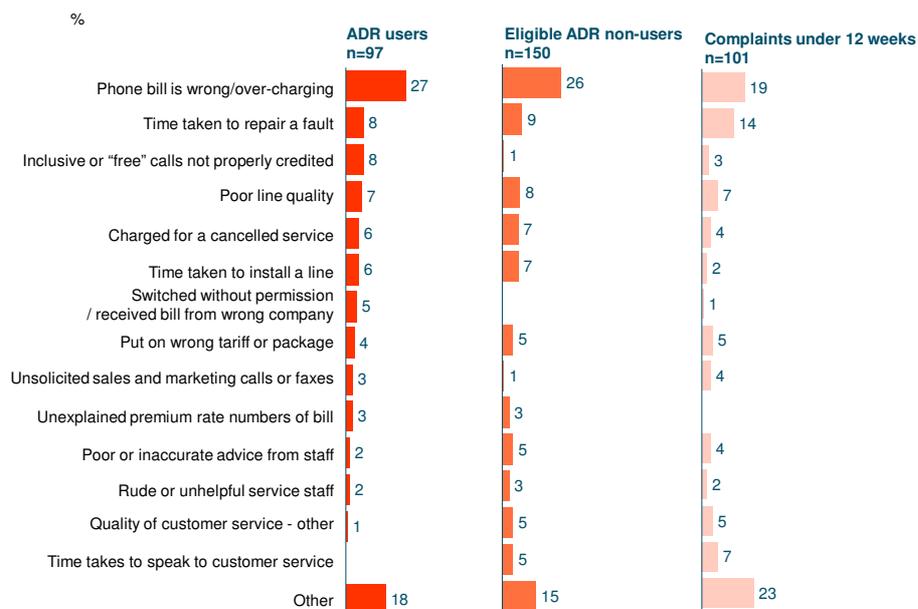
Figure 3.8 Nature of complaint to mobile phone provider – BUSINESS



Q10 What was the nature of your complaint to your provider? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

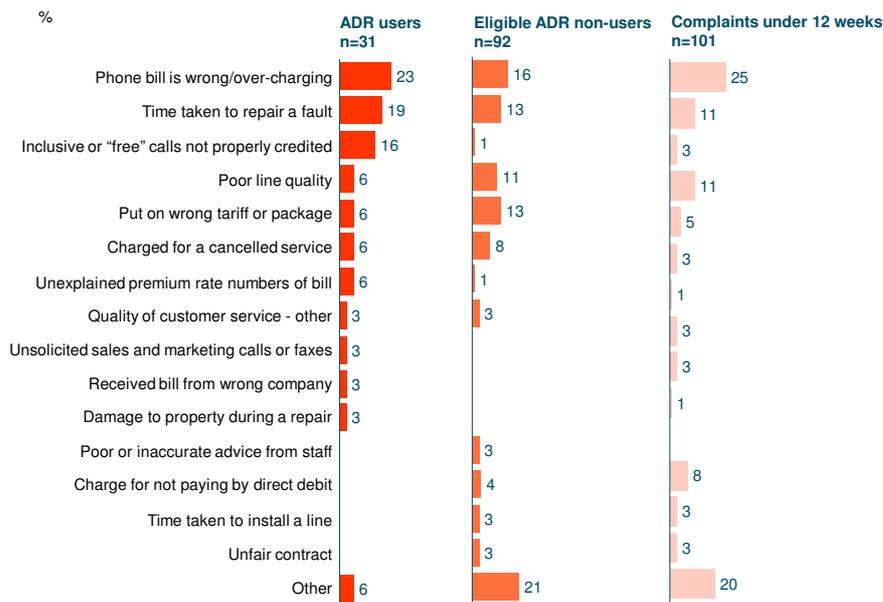
Figures 3.9 and 3.10 show that the most common complaints to landline phone service providers also concern “phone bill is wrong / over-charging”: 26% among eligible ADR non-users and 16% among small businesses (rising to 23% among ADR users).

Figure 3.9 Nature of complaint to landline provider – CONSUMER



Q10 What was the nature of your complaint to your provider? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

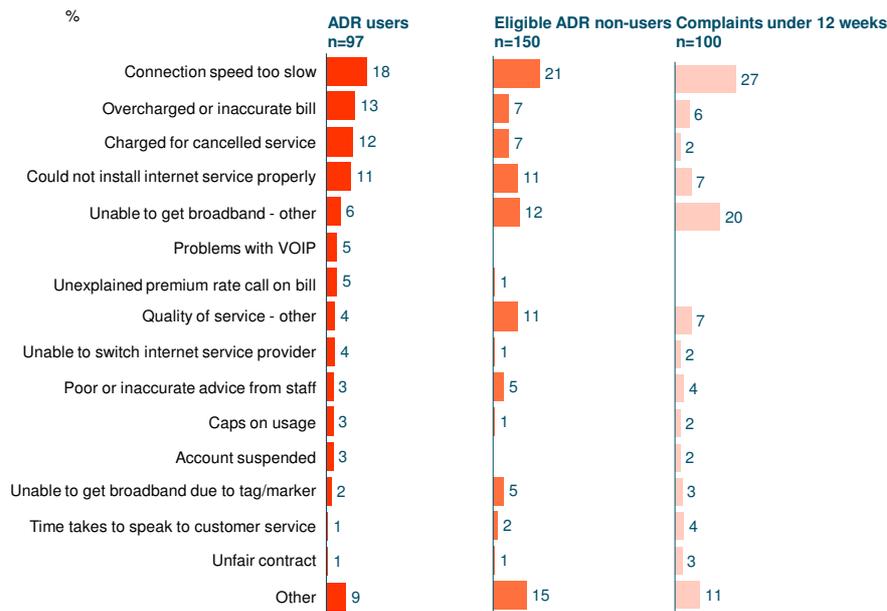
Figure 3.10 Nature of complaint to landline provider – BUSINESS



Q10 What was the nature of your complaint to your provider? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

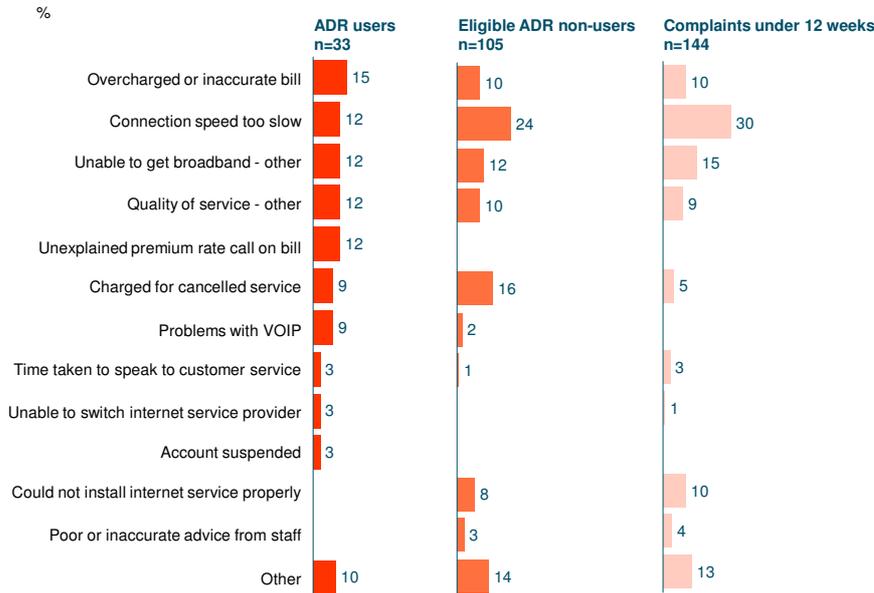
The most common complaints to broadband service providers concern “connection speed too slow”: 21% among consumers and 24% among small businesses (Figures 3.11 and 3.12 below). Small businesses’ complaints to broadband service providers referred to ADR schemes are more likely to concern an “overcharged or inaccurate bill” (15%).

Figure 3.11 Nature of complaint to broadband provider – CONSUMER



Q10 What was the nature of your complaint to your provider? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

Figure 3.12 Nature of complaint to broadband provider – BUSINESS

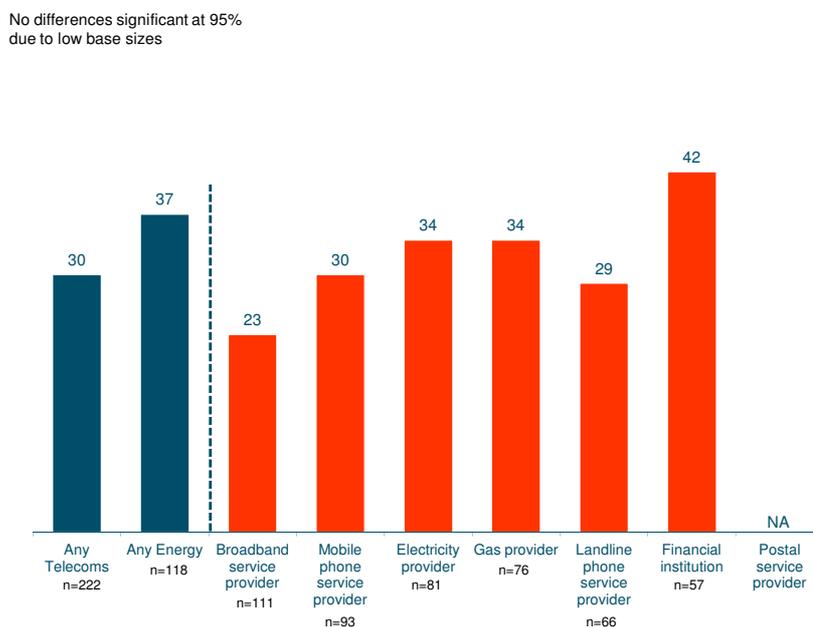


Q10 What was the nature of your complaint to your provider? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

3.4 Telecommunications ADR scheme eligibility

The Omnibus survey informs us in Figure 3.13 that although the public are more likely to complain about their telecommunications providers than about providers of other services, a higher proportion of complaints to telecommunications providers are resolved in a time-frame which means they are not eligible for ADR schemes: 30% of complaints to telecommunications service providers are eligible for ADR referral compared with 37% for energy service providers and 42% for financial service providers.⁴

Figure 3.13 Ratio of complaints made in last 12 months → eligible for ADR



Q1 Have you made a complaint to any of these types of service providers in the last year? This could be a current, ongoing complaint or one that has already been resolved.

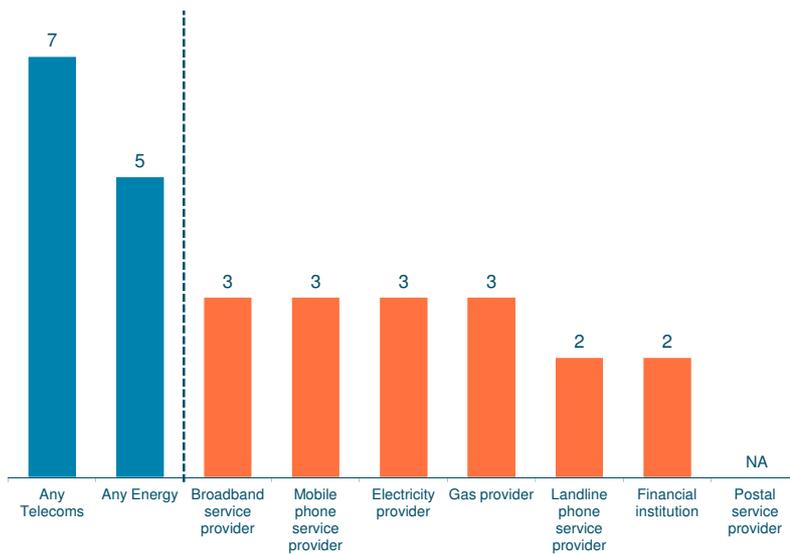
Q2a [FOR MOBILE PHONE, LANDLINE PHONE AND BROADBAND] Have any of these complaints taken 12 or more weeks to resolve?

Q2b [FOR GAS, ELECTRICITY AND FINANCIAL] Have any of these complaints taken 8 or more weeks to resolve?

⁴ Eligibility is based on 12 weeks for telecommunications, and 8 weeks for energy and financial service providers.

Figure 3.14 (below) shows this translates into 7% of the GB public having an eligible ADR complaint in the last 12 months compared with 5% for energy service providers and 2% for financial service providers.

Figure 3.14 ADR eligible complaints



Q1 Have you made a complaint to any of these types of service providers in the last year? This could be a current, ongoing complaint or one that has already been resolved.

Q2a [FOR MOBILE PHONE, LANDLINE PHONE AND BROADBAND] Have any of these complaints taken 12 or more weeks to resolve?

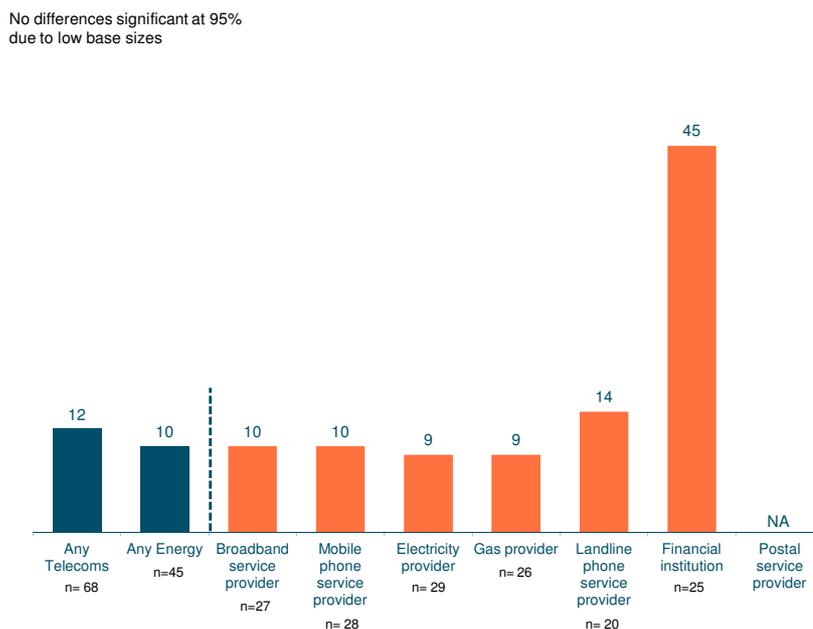
Q2b [FOR GAS, ELECTRICITY AND FINANCIAL] Have any of these complaints taken 8 or more weeks to resolve?

Base: All respondents (963)

3.5 Telecommunications ADR scheme usage

Figure 3.15 shows that in the Omnibus survey 12% of eligible telecommunications service provider complaints go to ADR. This is a similar level to energy service provider complaints (10%) but significantly lower than for financial service provider complaints (45% of which are referred).

Figure 3.15 Percentage of eligible complaints going to relevant ADR scheme



Q1 Have you made a complaint to any of these types of service providers in the last year? This could be a current, ongoing complaint or one that has already been resolved.

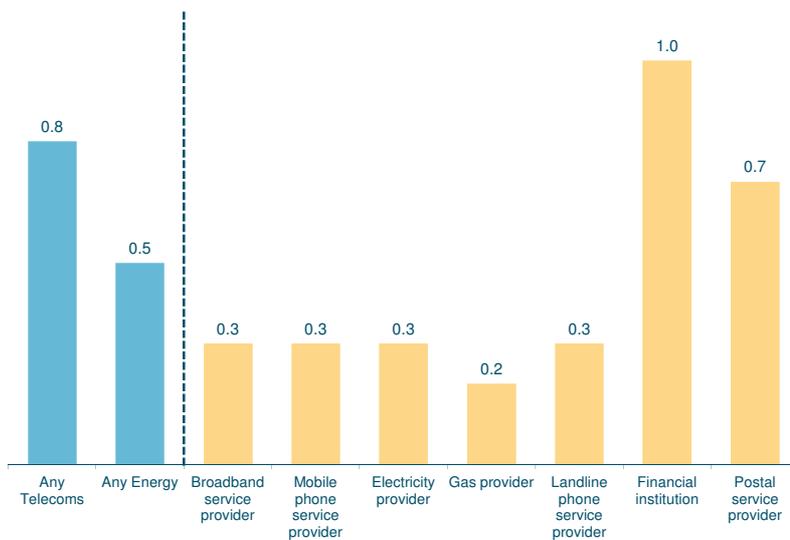
Q2a [FOR MOBILE PHONE, LANDLINE PHONE AND BROADBAND] Have any of these complaints taken 12 or more weeks to resolve?

Q2b [FOR GAS, ELECTRICITY AND FINANCIAL] Have any of these complaints taken 8 or more weeks to resolve?

Q3 Were any of your complaints with your [INSERT FROM Q1/Q2a/b AS RELEVANT] referred to the ...

Figure 3.16 shows that this translates into 0.8% of the GB public having a complaint referred to a telecommunications ADR service in the last 12 months compared with 0.5% for energy service providers, 1.0% for financial service providers and 0.7% for postal service providers. It has to be noted that these figures are based on consumers' perceptions of whether or not they went to ADR and therefore may not match actual ADR statistics.

Figure 3.16 Perceived ADR incidences among general public



Q1 Have you made a complaint to any of these types of service providers in the last year? This could be a current, ongoing complaint or one that has already been resolved.

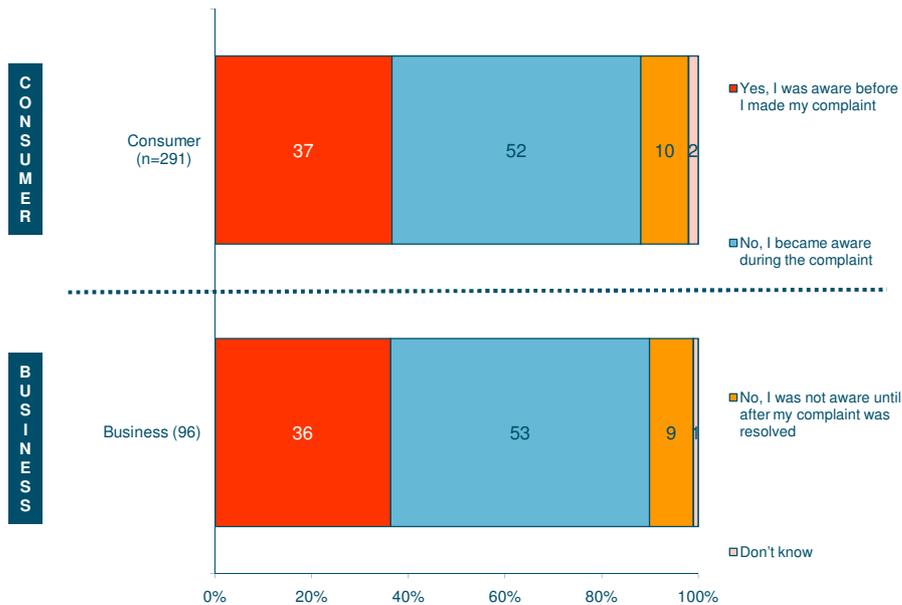
Q2a [FOR MOBILE PHONE, LANDLINE PHONE AND BROADBAND] Have any of these complaints taken 12 or more weeks to resolve?

Q2b [FOR GAS, ELECTRICITY AND FINANCIAL] Have any of these complaints taken 8 or more weeks to resolve?

Q3 Were any of your complaints with your [INSERT FROM Q1/Q2a/b AS RELEVANT] referred to the ...

The Custom Quantitative survey indicates in Figure 3.17 that 37% of consumers and 36% of small businesses who used ADR schemes had been aware of the scheme at the time they initially complained to their provider. This level of awareness is significantly higher than awareness among the general public (8%) and among eligible non-users (15%) and points to awareness being a key factor driving usage.

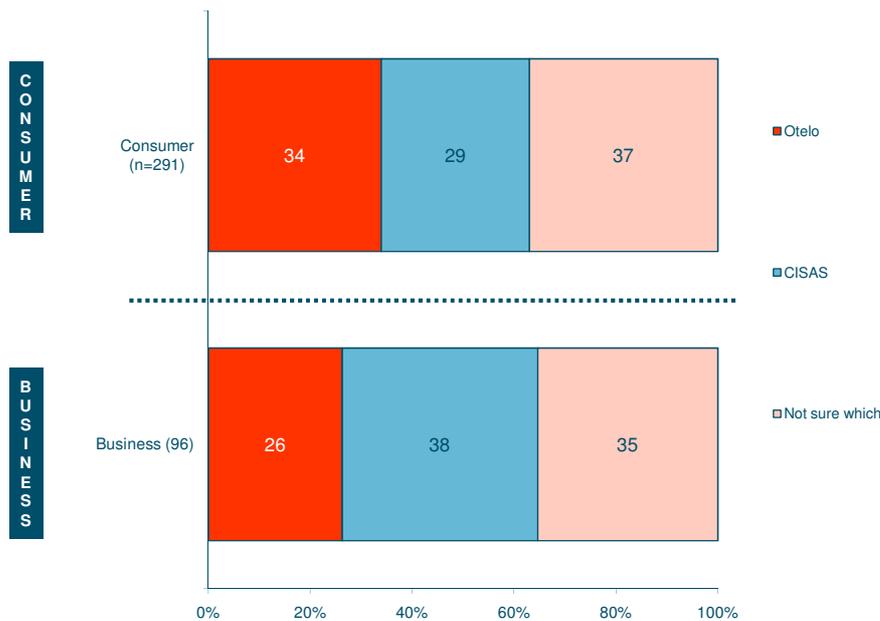
Figure 3.17 ADR users' awareness of ADR schemes when making complaint



Q14 You mentioned earlier that you were aware of the Alternative Dispute Resolution scheme before now. Were you aware of this scheme when you made your complaint to your provider?
 Base: All aware of ADR (526)

Also from the Custom Quantitative survey in Figure 3.18 below, we know that 37% of consumers and 35% of small businesses who used a telecommunications ADR scheme did not know whether they had used an Otelo or a CISAS scheme. Otelo (34%) and CISAS (29%) were used by consumers in approximately equal measure whereas there was higher use of the CISAS scheme (38%) than the Otelo scheme (26%) among small businesses.

Figure 3.18 ADR scheme used



Q9 For any of your complaints with your provider, did you submit an application to have your complaint considered by the Alternative Dispute Resolution scheme provided by Otelo or CISAS?

3.6 Profile of telecommunications ADR users

From the Custom Quantitative survey, we find that males are significantly more likely than females to refer telecommunications complaints to an ADR scheme (63% of ADR users are male, 37% female). Also, younger consumers are more likely than older consumers to use ADR (62% of ADR users are aged 18-34 years, 38% are 35 and older).

ADR users are also more likely to suffer from conditions such as visual impairment (13% of ADR users compared to 6% of eligible non-users) and difficulty communicating (15% of ADR users compared to 2% of eligible non-users).

Among the small business community, ADR users are less likely to be self-employed (51% of ADR users compared to 59% of eligible non-users) or sole traders (16% of ADR users compared to 36% of eligible non-users).

Section 4

Outcome and experience of telecommunications ADR schemes

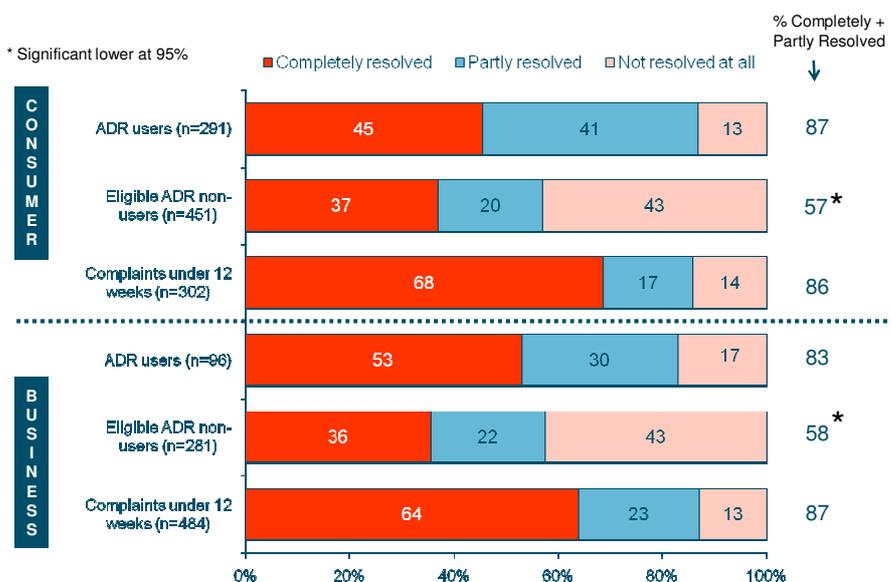
All of the comments in this section refer to the Custom Quantitative survey.

4.1 Outcome of telecommunications ADR schemes

Consumer complainants were asked about the status of their complaint with their provider. Figure 4.1 (below) shows that those who had used an ADR scheme were significantly more likely to consider their complaint to be at least 'partly resolved' (87%) than those who were eligible to use an ADR scheme but had not done so (57%). 45% of ADR referred complaints were considered to be 'completely resolved' by consumers compared with 37% of non-referred eligible complaints.

A similar pattern is evident among small businesses with 53% of complaints referred to an ADR scheme perceived to be 'completely resolved' compared with 36% of eligible complaints that were not referred to ADR schemes.

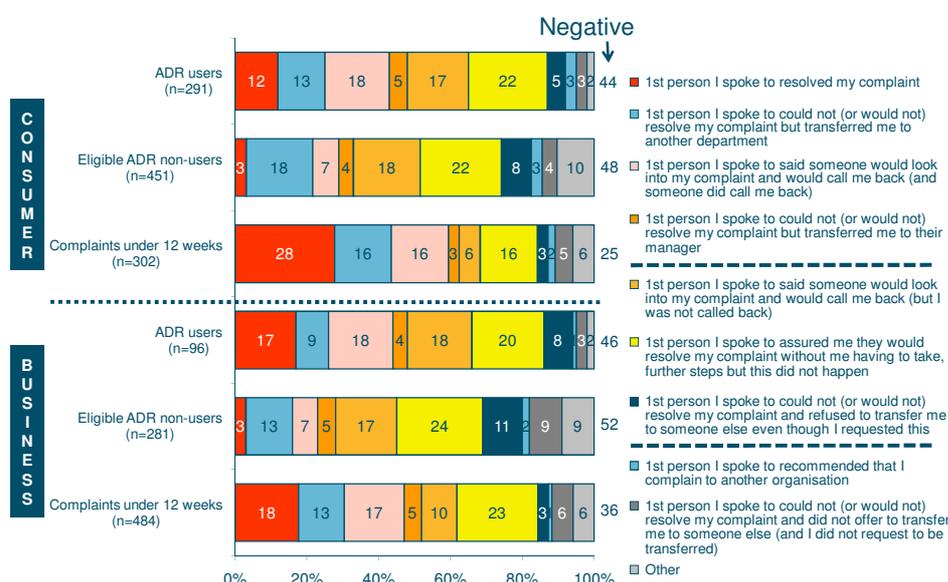
Figure 4.1 Status of complaint



Q12 What is the status of your complaint with your provider?

Figure 4.2 shows that 44% of ADR using consumers recalled their first call to their provider when they complained as being a ‘negative’ experience. In other words, they were promised that someone would look into their complaint and call them back or that their complaint would be resolved without them having to take further action (but this did not happen) or they were refused further help by the person they initially spoke to. This proportion with a ‘negative’ perception is broadly in line with the experience of eligible ADR non-users (48%) but significantly higher than those whose complaints were resolved in under 12 weeks (25%).

Figure 4.2 Provider response at first call



Q13 Thinking about the first call you made to your provider regarding the complaint, which of the following best describes what happened?

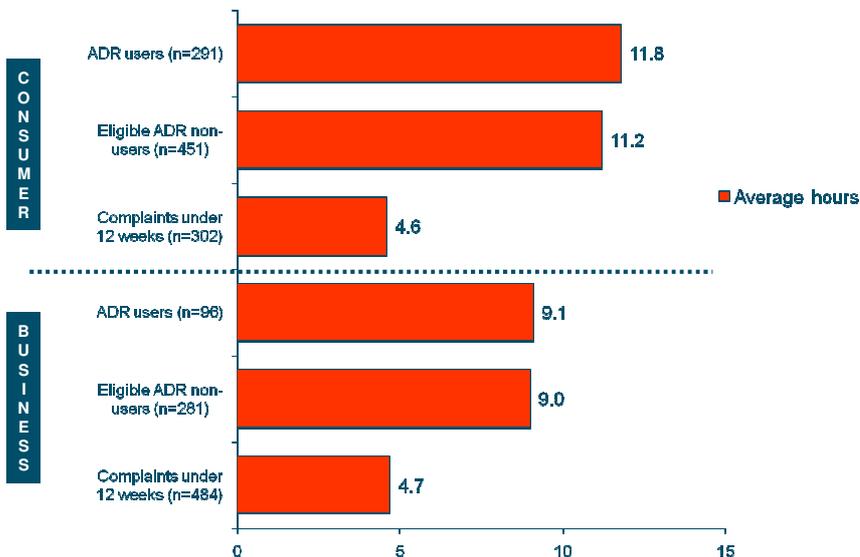
There is a similar pattern among small businesses, with 46% of ADR users describing their initial call to their provider as a ‘negative’ experience compared with 52% of eligible ADR non-users and a significantly lower proportion (36%) of those who complaints were resolved in less than 12 weeks.

4.2 Perceived time and cost involved in telecommunications complaint process

Complainants were asked how much time they spent actively pursuing their complaint with their provider until the complaint was resolved (or up until the time of interview if the complaint remained unresolved). Additionally, they were asked to estimate how much the complaint process had cost them in monetary terms. Responses varied widely but, if we look at the average figures reported, there is a high degree of consistency between ADR users and eligible non-users whereas, not surprisingly, those whose complaints were resolved in under 12 weeks tended to spend less time and money on their complaint.

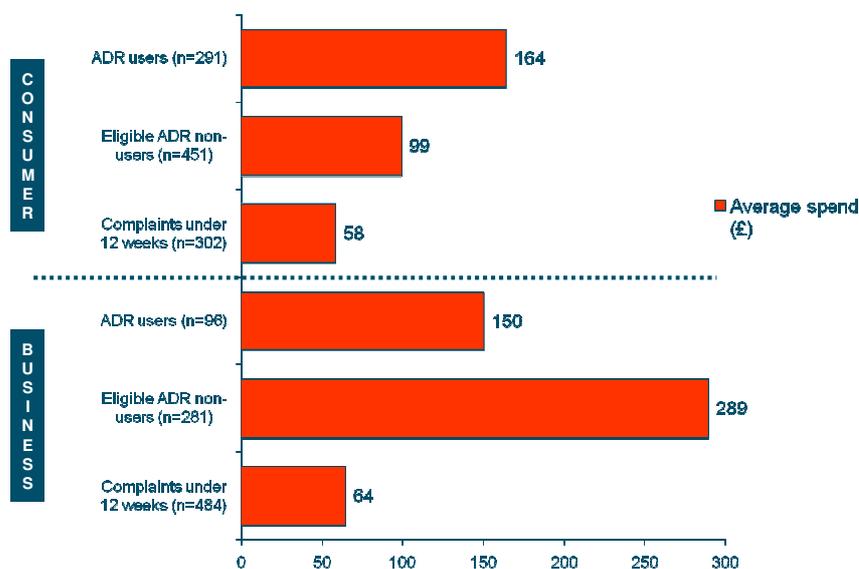
Figures 4.3 and 4.4 (below) show that Consumer ADR users spent an average of 11.8 hours and £164 pursuing their complaint compared with 11.2 hours and £99 among eligible ADR non-users and 4.6 hours and £58 among those with complaints resolved in less than 12 weeks. The equivalent average figures for small business complainants are generally lower in terms of time spent on the complaint than among consumers: 9.1 hours and £150 among ADR users, 9 hours and £289 among eligible ADR non-users and 4.7 hours and £64 among those with complaints resolved in less than 12 weeks.

Figure 4.3 Overall amount of time (hours) spent actively pursuing complaint



Q23 Overall, how much time did you spend actively pursuing your complaint with your (INSERT FROM Q5/Q6/Q9), i.e. writing letters, emails, making phone calls etc. until the complaint was resolved (or up until now if the complaint remains unresolved)?

Figure 4.4 Overall cost of pursuing complaint in monetary terms (£)



Q24 In total, how much would you say this issue has cost you in monetary terms? Please think about any costs you may have incurred, for example, the size of the original amount charged, the impact of any loss in service, the costs incurred in trying to resolve the problem, and so on.

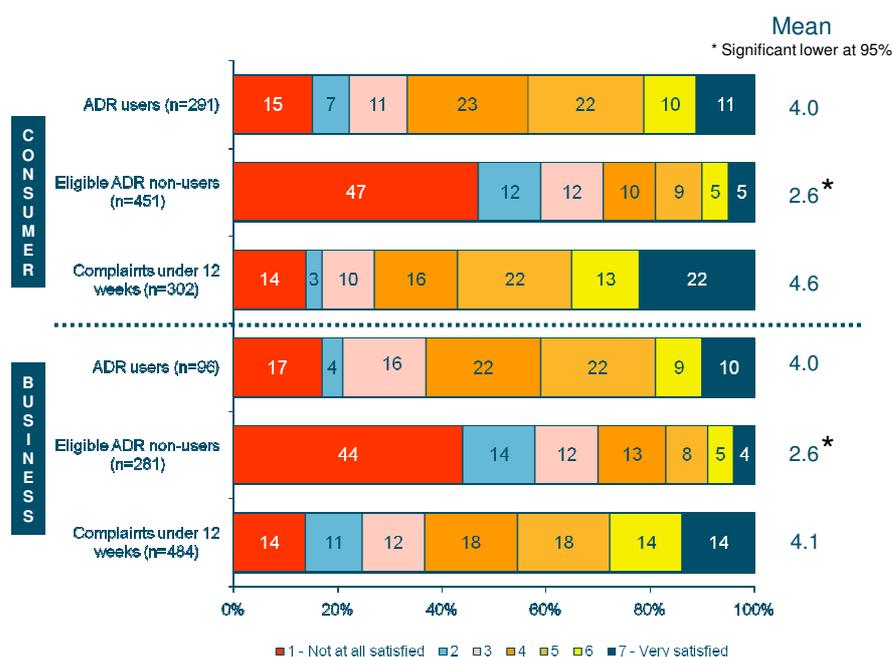
4.3 Satisfaction with telecommunications complaint process

A 7-point scale was used to measure complainants' overall satisfaction with the final outcome of their complaint to their provider. A score of 7 indicates that the complainant was 'very satisfied' and a score of 1 indicates that the complainant was 'not at all satisfied'.

Figure 4.5 below shows that consumers who used an ADR scheme had significantly higher satisfaction levels (a mean score of 4.0 out of 7) than eligible ADR non-users (2.6 mean score) although significantly lower levels of satisfaction than complainants whose complaints were resolved in less than 12 weeks (4.6 mean score). Importantly, the use of ADR significantly reduces the likelihood that a complainant will be very dissatisfied with the outcome of their complaint: 15% of consumer ADR users were very dissatisfied, compared with 47% of consumers whose complaint lasted 12 weeks but did not go to ADR.

A similar pattern emerged among small business complainants with ADR users: 44% of eligible ADR non-users were very dissatisfied with the outcome of their complaint, compared with only 17% for those that went to ADR (which is very similar to levels of dissatisfaction amongst business complainants whose complaints were resolved in under 12 weeks).

Figure 4.5 Satisfaction with outcome of complaint



Q18 Overall, how satisfied were you with the final outcome of your complaint to your provider? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

The outcome of complaints is likely to have a bearing on complainants' satisfaction (we can anticipate a higher degree of satisfaction among those whose complaint is 'completely resolved' in other words). It is, therefore, worthwhile noting that dissatisfaction is still directionally lower among consumer ADR users (8% dissatisfied) than among eligible ADR non-users (17% dissatisfied) when comparing only those whose complaint was 'completely resolved'. This is also the case among the business sample (6% compared to 14%).

Additional, more specific, questions were asked to gauge complainants' experiences of dealing with their provider during the complaint process:

- Ease of resolving complaint with provider
- Ease of getting provider to recognise their complaint
- Satisfaction with provider making it clear how their complaint would be handled
- Satisfaction with the time taken to resolve their complaint

Figure 4.6 (below) shows that dissatisfaction levels were significantly lower among ADR users than among eligible ADR non-users on all aspects of their interaction with their provider – a comment which applies to the consumer and small business samples.

Figure 4.6 Discontent with complaint process

* Significant higher at 95%

Very dissatisfied (1/7)	CONSUMER			BUSINESS		
	ADR users (n=291)	Eligible ADR non- users (n=451)	Complaints under 12 weeks (n=302)	ADR users (n=96)	Eligible ADR non- users (n=281)	Complaints under 12 weeks (n=484)
Satisfaction with outcome of complaint	15	47 *	15	17	44 *	14
Ease of resolving complaint with provider	22	59 *	18	24	56 *	18
Ease of getting provider to recognise complaint	16	37 *	14	24	37 *	11
Satisfaction with provider making it clear how complaint would be handled	20	48 *	18	20	45 *	18
Satisfaction with time taken to resolve complaint	28	67 *	19	29	63 *	22

Q19 And how easy was it to resolve this complaint with your provider? Please select one answer on a scale of 1-7 where 1 is 'Very difficult' and 7 is 'Very easy'.

Q20a And how easy was it to get your provider to recognise that you were making a complaint (i.e. that they should take steps to address your dissatisfaction)? Please select one answer on a scale of 1-7 where 1 is 'Very difficult' and 7 is 'Very easy'.

Q20b And how satisfied were you with your provider with regard to them making it clear how your complaint would be handled (including when you should expect a response and what to do if you remained dissatisfied)? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Q21 And how satisfied were you with the time it took to resolve the complaint you had with your provider on this occasion? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

4.4 Levels of worry, stress & anger experienced during telecommunications complaint process

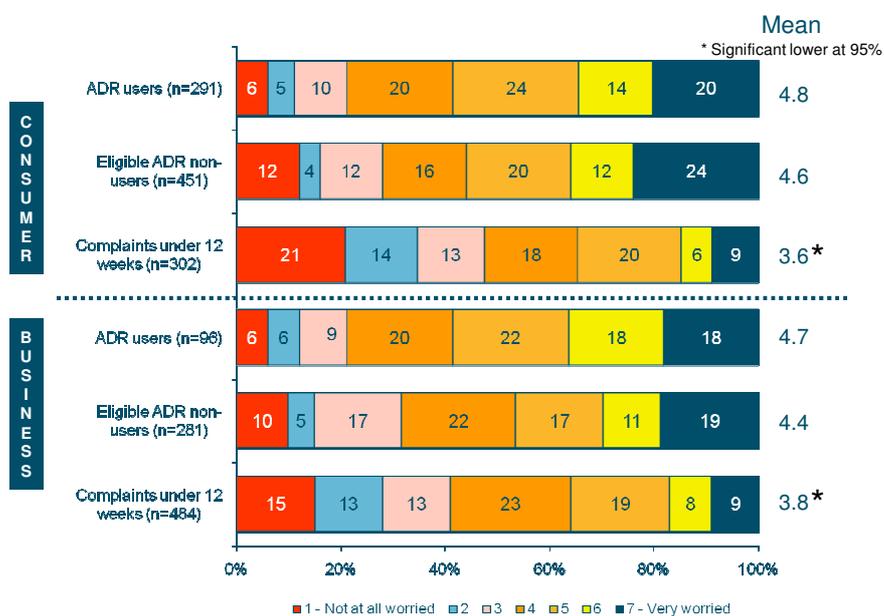
Complainants were asked to record how worried, stressed and angry they felt whilst trying to resolve their complaint using 7-point scales (again with 7 indicating the highest score and 1 the lowest score). There is a significant difference between complaints resolved within 12 weeks and those that last longer with worry, stress and anger levels higher among both consumers and small business complainants. The pattern is similar across all measures with a full point difference in the mean scores that summarise complainants' response in most cases.

The following example of the ratings provided serves to make the distinction between the groups very clear. 31% of consumers using an ADR scheme rated the complaint experience

'very stressful compared with 45% of eligible ADR non-users and a significantly lower 18% of those whose complaints lasted less than 12 weeks. The equivalent small business figures are 34%, 35% and again a significantly lower 20%.

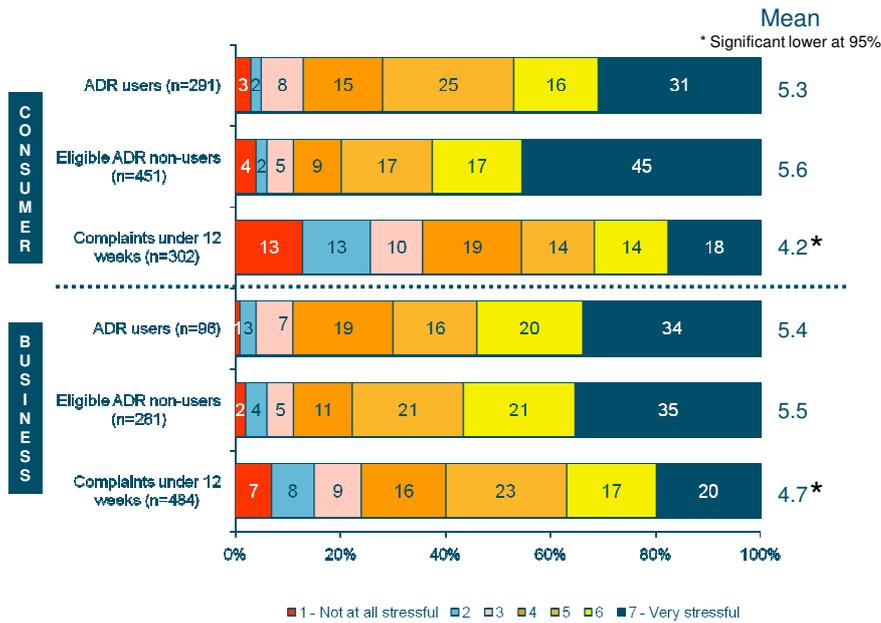
It is worthwhile noting that both consumers and business complainants tend to feel more stressed than they do worried and anger towards providers is also at a heightened level among both groups. Levels of worry, stress and anger are illustrated in Figures 4.7, 4.8 and 4.9 below.

Figure 4.7 Level of worry while trying to resolve complaint



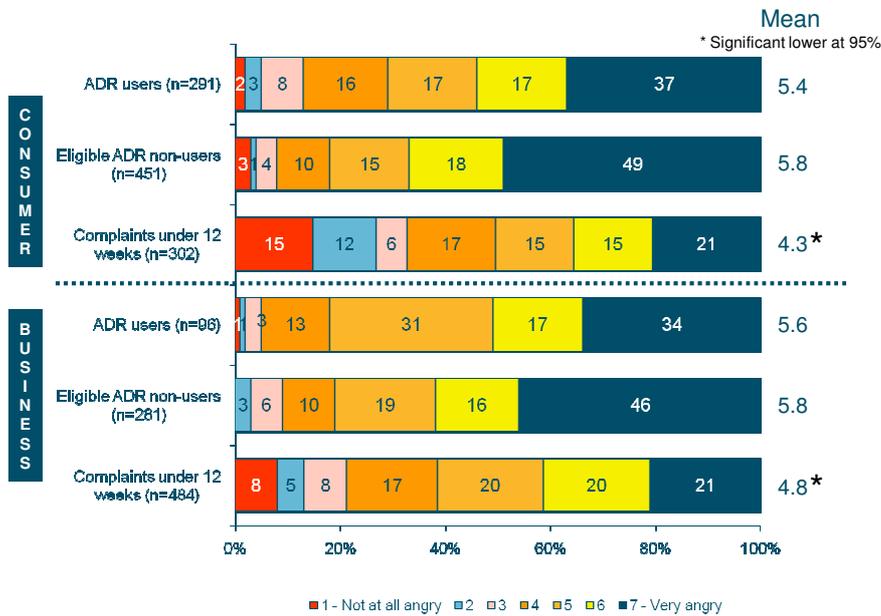
Q25 We are interested in how you felt during the complaint process. How worried did you feel while trying to resolve the complaint?

Figure 4.8 Level of stress while trying to resolve complaint



Q26 How stressful did you find trying to resolve the complaint?

Figure 4.9 Level of anger felt while trying to resolve complaint

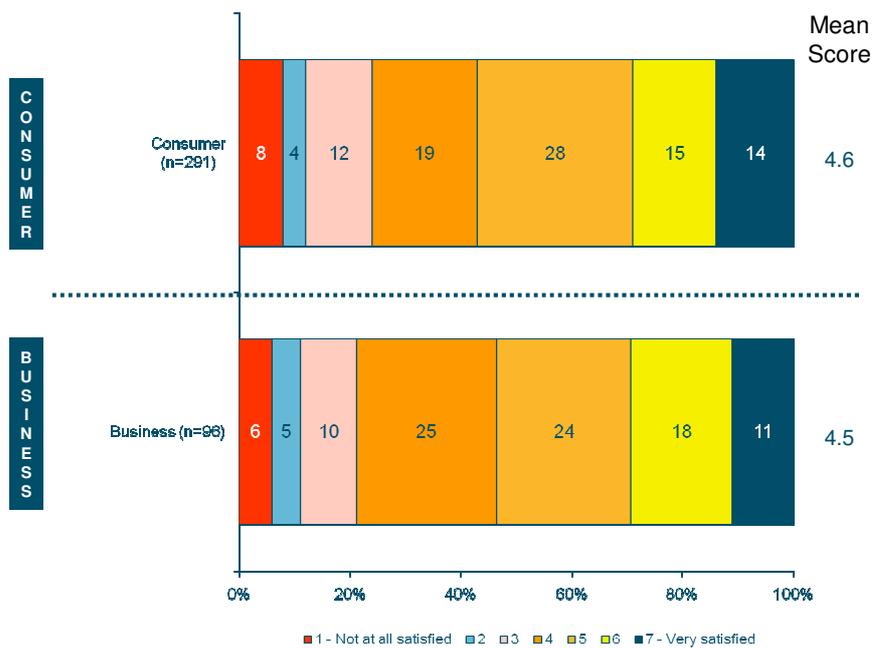


Q27 How angry did you find trying to resolve the complaint?

4.5 Satisfaction with telecommunications ADR scheme itself

Those using ADR schemes were asked to state their overall satisfaction with the scheme itself using a 7-point scale. Figure 4.10 shows that overall there was a more positive (30% tending towards 'very satisfied') than negative (12% tending towards 'not at all satisfied') response among consumers and a similar response among small businesses (29% satisfied, 11% dissatisfied).

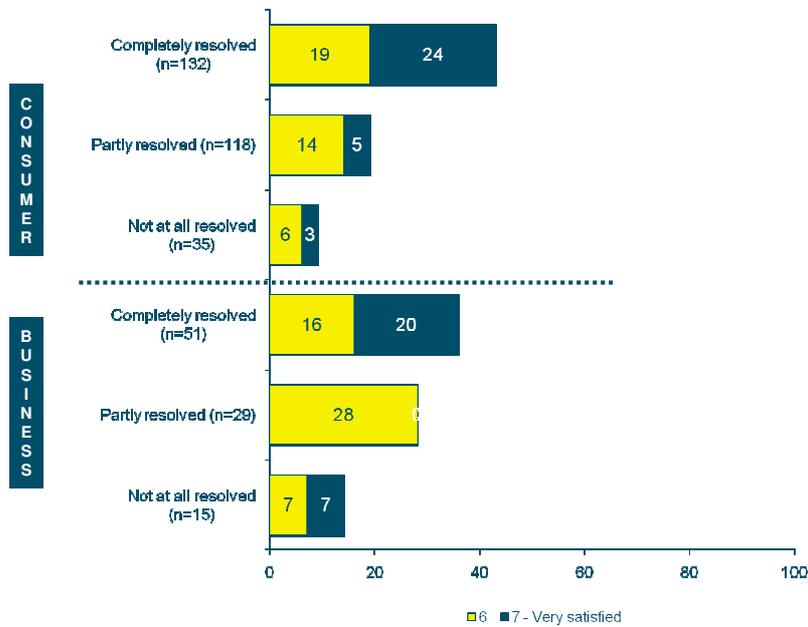
Figure 4.10 Overall satisfaction with ADR scheme itself



Q22 And overall how satisfied were you with the Alternative Dispute Resolution scheme itself? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Figure 4.11 shows that satisfaction levels are significantly higher among ADR users whose complaints were 'completely resolved' than among those with a partial or non-resolution.

Figure 4.11 Overall satisfaction with ADR scheme itself – by outcome of complaint

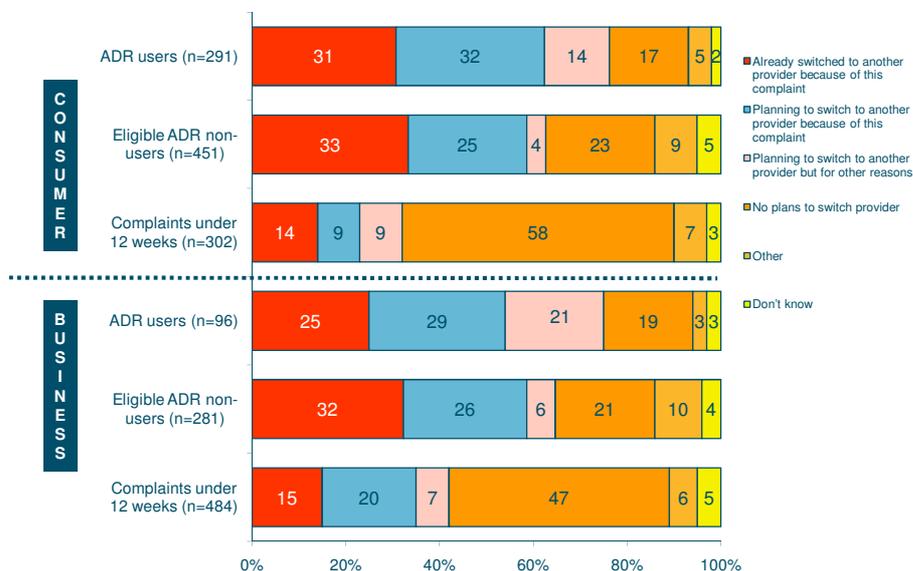


Q22 And overall how satisfied were you with the Alternative Dispute Resolution scheme itself? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

4.6 Actions taken as a result of the telecommunications complaint process

Among consumers, there is a significant difference in actions taken in relation to providers in response to the complaints process according to how quickly the complaint was resolved. For example, as Figure 4.12 below shows, complainants whose complaints were resolved in less than 12 weeks were unlikely to have already switched provider due to the complaint (14% had done so, 9% were planning to do so), whereas 32% of those whose complaints lasted more than 12 weeks had already switched and a further 29% were planning to do so as a direct consequence of the complaint process.

Figure 4.12 Actions taken/planned in relation to current provider



Q28 Which of the following statements best describes what you have done (or plan to do) about your current provider?

There was a very similar response among small businesses with 15% of those with complaints resolved in less than 12 weeks having switched (and 20% planning to switch) compared with 29% (and 28%) among those with longer lasting complaints.

There is no statistical difference between ADR users and eligible ADR non-users on this measure.

Section 5

Impact of ADR awareness on satisfaction

All of the comments in this section refer to the Custom Quantitative survey.

Sections 4.3 and 4.4 have shown that consumers and small businesses that go to ADR are less likely to experience extreme levels of dissatisfaction with the outcome of their complaint. Figure 5.1 indicates that those ADR users who were aware of ADR schemes when they made their complaint are even less likely to experience dissatisfaction than those who only became aware of ADR during the complaint (9% dissatisfaction with the outcome of complaint compared to 20% respectively). They are also significantly less likely to feel very angry while trying to resolve the complaint (27% compared to 41%).

Figure 5.1 Discontent with complaint process by ADR awareness (ADR users only)

* Significant higher at 95%

ADR users only	CONSUMER & BUSINESS %	
	Aware before making complaint (n=143)	Became aware during complaint (n=201)
Very dissatisfied with outcome of complaint (1/7)	9	20 *
Very dissatisfied with ease of resolving complaint with provider (1/7)	15	28 *
Very dissatisfied with ease of getting provider to recognise complaint (1/7)	13	24 *
Very dissatisfied with provider making it clear how complaint would be handled (1/7)	12	26 *
Very dissatisfied with time taken to resolve complaint (1/7)	17	37 *
Felt very worried while trying to resolve the complaint (7/7)	22	18
Felt very stressful while trying to resolve the complaint (7/7)	27	37
Felt very angry while trying to resolve the complaint (7/7)	27	41 *

Q19 And how easy was it to resolve this complaint with your provider? Please select one answer on a scale of 1-7 where 1 is 'Very difficult' and 7 is 'Very easy'.

Q20a And how easy was it to get your provider to recognise that you were making a complaint (i.e. that they should take steps to address your dissatisfaction)? Please select one answer on a scale of 1-7 where 1 is 'Very difficult' and 7 is 'Very easy'.

Q20b And how satisfied were you with your provider with regard to them making it clear how your complaint would be handled Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Q21 And how satisfied were you with the time it took to resolve the complaint you had with your provider on this occasion? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Q25 How worried did you feel while trying to resolve the complaint?

Q26 How stressful did you find trying to resolve the complaint?

Q27 How angry did you find trying to resolve the complaint?

These findings indicate that previous awareness of ADR schemes significantly reduces the likelihood of experiencing extreme levels of discontent and anger during and after the complaint process.

Figure 5.2 shows that among eligible non-ADR users, levels of extreme discontent do not differ by awareness of ADR.

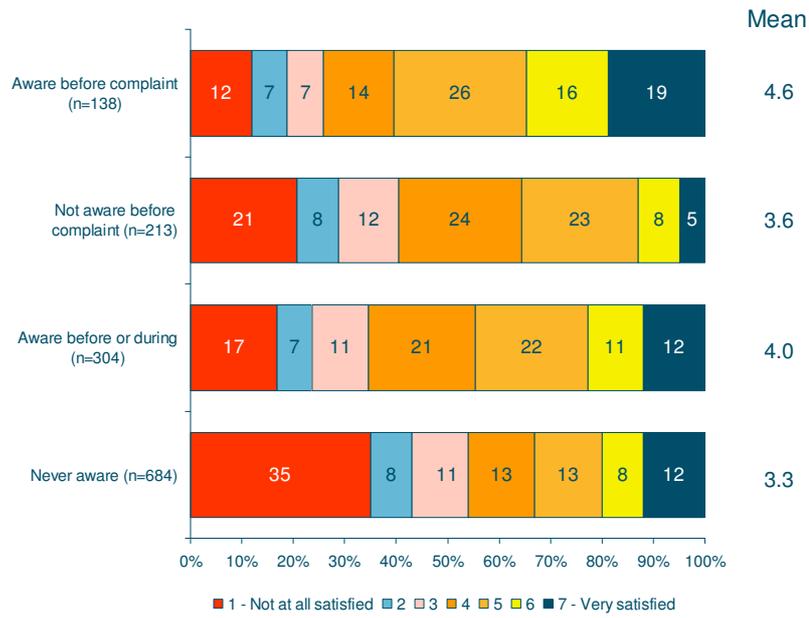
Figure 5.2 Discontent with complaint process by ADR awareness (Eligible non-ADR users only)

* Significant higher at 95%

Eligible non-ADR users only	CONSUMER & BUSINESS	
	%	
	Aware of ADR (n=71)	Not aware of ADR (n=661)
Very dissatisfied with outcome of complaint (1/7)	42	46
Very dissatisfied with ease of resolving complaint with provider (1/7)	56	58
Very dissatisfied with ease of getting provider to recognise complaint (1/7)	39	36
Very dissatisfied with provider making it clear how complaint would be handled (1/7)	41	48
Very dissatisfied with time taken to resolve complaint (1/7)	70	65
Felt very worried while trying to resolve the complaint (7/7)	27	21
Felt very stressful while trying to resolve the complaint (7/7)	48	40
Felt very angry while trying to resolve the complaint (7/7)	56	47

Figure 5.3 shows the satisfaction with the outcome of the complaint by ADR awareness, across a total sample that includes ADR users, eligible non-ADR users as well as short-lived complaints. It shows that those that haven't been aware of ADR at any point in the process experience the highest levels of dissatisfaction (35% 'Not at all satisfied'). However, it has to be noted that due to the sample composition, ADR users are over-represented among those that are aware. As previous sections have shown that ADR users experience higher levels of satisfaction with the outcome of their complaint, the differences in satisfaction cannot be purely attributed to ADR awareness alone but actual ADR participation also has to be taken into account when interpreting these figures.

Figure 5.3 Satisfaction with outcome of complaint – by ADR awareness



Source: Q18 Overall, how satisfied were you with the final outcome of your complaint to your provider? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Section 6

ADR preferences

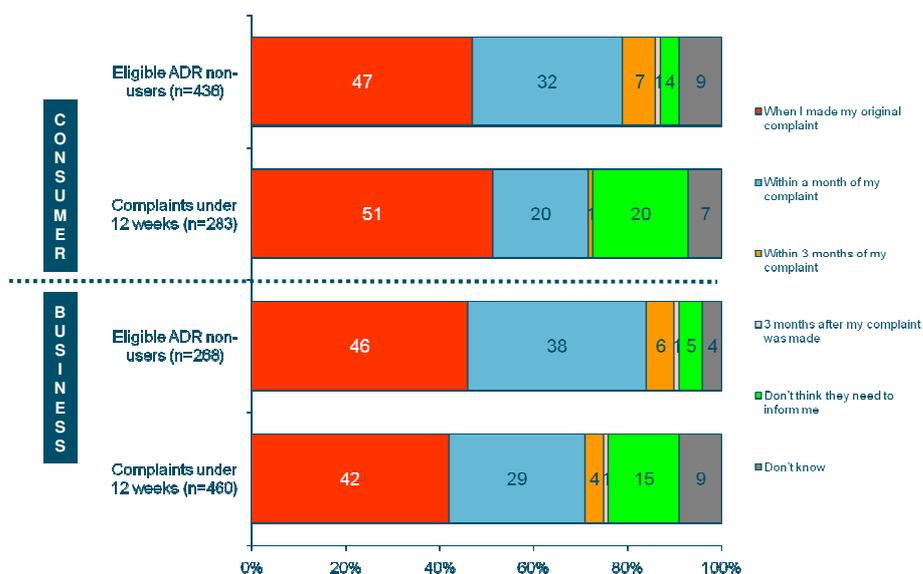
All of the comments in this section refer to the Custom Quantitative survey.

6.1 When provider should inform about telecommunications ADR schemes

Non-users of ADR schemes (including eligible non-users and those whose complaints were resolved in less than 12 weeks) were presented with a number of options ranging between ‘when I made my original complaint’ through to ‘3 months after my complaint was made’ and including ‘don’t think they need to inform me’ and asked to state at what stage in the complaint process their provider should inform them about ADR schemes.

Figure 6.1 shows that relatively few (around 1 in 10 of both the consumer and business samples) would not want to be informed at all, the vast majority would like to be informed within one month of their complaint and around half of consumers and two-fifths of small businesses would prefer to be informed at the time they make their original complaint.

Figure 6.1 Stage when provider should inform about ADR scheme



Q16 At what stage do you think your provider should have informed you about the Alternative Dispute Resolution process?

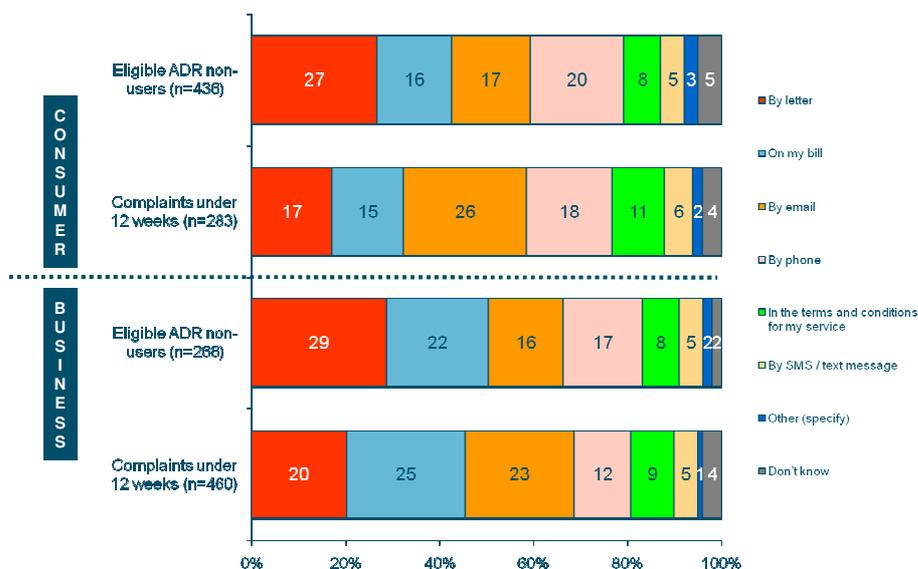
6.2 How provider should inform about telecommunications ADR schemes

There is no consensus at all among complainants about how they would like their provider to inform them about the point at which they are eligible to submit an application to the ADR schemes.

In order of mention, the most popular methods among consumers are 'by letter' followed 'by email', 'by phone' and then 'on my bill' as Figure 6.2 shows below.

The same four methods are most popular among business complainants although in a slightly different order: 'by letter', 'on my bill', 'by email' and then 'by phone'.

Figure 6.2 Way in which provider should inform about ADR scheme



Q17 How would you have liked your provider to inform you about the point at which you were eligible to submit an application to the Alternative Dispute Resolution schemes?

Section 7

The consumer experience of long-lasting complaints

This section summarises differences in the experience of complainants with long-lasting complaints compared with those whose complaint was resolved within 12 weeks.

7.1 Differences in nature of complaints

Short-lived complaints (those resolved within 12 weeks) were more likely to be about the following issues:

- Complaints to mobile service providers: problems with their handset or 'free' calls not credited among consumers and being overcharged or put on the wrong tariff among small businesses.
- Complaints to landline service providers: the time taken to repair a fault among Consumers and being overcharged among small businesses (long-lasting complaints however were more likely to be about being put on the wrong tariff).
- Complaints to broadband service providers: being unable to get broadband among Consumers and low connection speeds among small businesses (long-lasting complaints however were more likely about being charged for cancelled services).

The complaint experience when first calling the provider to complain is also significantly different. Whereas 28% of short-lived consumer complaints were resolved by the 1st person they spoke to, this was the case for only 3% of long-lasting complaints (18% and 3% among small businesses respectively). The apparent contradiction of some long-lasting complaints being resolved during the first call to the provider can be explained when considering that these consumers might have complained through another channel first (e.g. email or letter).

7.2 Complaint experience

For complaints that are not resolved within 12 weeks, complainants are much more likely to experience detriment:

- They are less likely to be informed about the process and less likely to be able to get their provider to recognise they are making a complaint.

- They spend more time trying to resolve the complaint (consumers spend between 10-14 hours actively pursuing complaints that take 12 or more weeks to resolve, compared with between 3-6 hours for complaints resolved in under 12 weeks).
- They incur higher direct costs (average between £100-200 for such complaints, compared with an average of c. £60 for complaints resolved in under 12 weeks).
- They are much more likely to experience higher levels of stress, worry, and anger (as evidenced by the graphs provided in Chapter 4).

Consumers with long-lasting complaints are also much more likely than consumers with short-lived complaints to have switched or be planning to switch providers because of the complaint (58% compared to 23%).

Annex

Annex A - Methodology

A.1 Custom Quantitative Research

Quantitative research was undertaken 14-31 August, 2009 among 1,044 consumers and 861 small businesses (defined as having between 1-10 employees).

To qualify for interview, participants had to have complained to one of their communications service providers in the last 12 months. Quota controls were used to ensure robust numbers of complainants falling into 3 categories:

- ADR scheme users
- Eligible ADR non-users
- Complaint lasting less than 12 weeks

Quotas controls were also used to ensure an approximate 3-way split of mobile, fixed telephony and broadband service provider complainants.

Online panels were used to target this difficult to find group and the research was completed online via a self-completion methodology. Due to the self-completion methodology and exclusion of eligible people who do not have online access, it is not possible to say the sample is representative of all people who raised or are eligible to raise an issue with a ADR body. However, sufficiently large subsamples of people raising a telecoms, broadband or mobile issue were achieved to allow significant differences in these groups to be identified.

A.2 Omnibus Research

BMRB's Face-to-Face Omnibus is a weekly survey among a nationally representative sample of adults aged 15+ across Great Britain.

For this project, fieldwork was conducted 20-26 August, 2009 with a sample of 963 adults aged 18+ across Great Britain.

The sampling technique, developed and refined over many years, is a tightly controlled form of random location sampling (random locale). This technique provides nationally representative samples at a fraction of the cost of random probability surveys.

Random location is a single-stage sample design, taking as its universe Sample Units, a bespoke amalgamation of Output Areas (OA's – the basic building block used for output from the 2001 Census) in Great Britain. Sample Units have an average size of 300 households and this is subject to far less variation than was with the case with EDs (Enumeration Districts). OA's are grouped into Sample Units by CACI within ward and taking account of their ACORN characteristics.

The use of ACORN ensures all types of area are fully represented and that selection of respondents is largely taken out of the hands of the interviewers. In conventional quota sampling interviewers are given quotas to fill, usually from specified administration areas. When, for example, an interviewer is asked to complete a quota of AB respondents she will tend to go to a part of the district where she knows such individuals to be available. AB individuals living in mixed social class areas will have little chance of inclusion. A significant proportion of the population lives in mixed social class areas so this can lead to bias. On BMRB Face to Face Omnibus the interviewer is required to draw respondents from a small set of homogenous streets, selected with probability proportional to population after stratification by ACORN characteristics and region.

Likelihood of being at home and so available for interview is the only variable not controlled. Quotas are therefore set to control this element – age and working status within sex - giving a near to random sample of individuals within an SU.

Typically 210 sampling units (sampling points) per survey are used.

Annex B - Questionnaires

A. Custom Quantitative Research Questionnaire

BUSINESS SAMPLE ONLY

Q1 Which of the following best describes your working status?

Please select one answer

Employed
Self-employed
Unemployed
Home duties
Student
Retired
Other

[TERMINATE ALL EXCEPT THOSE CODED 'EMPLOYED' OR 'SELF-EMPLOYED']

BUSINESS SAMPLE ONLY

Q2 And how many employees or business partners, ++including yourself++, are employed by your company or organisation?

Please select one answer

1
2-5
6-10
11-50
51-250
251+

[TERMINATE ALL EXCEPT THOSE CODED '1', '2-5' OR '6-10']

ASK ALL

Q3 Are you...?

Please select one answer

Male
Female

Q4 Please enter your age into the box below.

[RANGE 11-99. TERMINATE IF LESS THAN 18]

Q5 Have you made a ++complaint++ to any of these service providers in the last year
This could be a current, ongoing complaint or one that has already been resolved.

++Complaint++ is defined as an expression of dissatisfaction made to a service provider related to its products or services, or the complaints-handling process itself, where a response or resolution is expected.

Please select one answer for each type of provider

[GRID]

Yes

No

Mobile phone service provider
Landline phone service provider
Broadband service provider

[TERMINATE INTERVIEW IF SELECTED 'NO' FOR MOBILE, LANDLINE AND BROADBAND]

Q6 Have any of these complaints taken 12 or more weeks to resolve?

Please select one answer for each type of provider

[GRID]

Yes

No

Mobile phone service provider
Landline phone service provider
Broadband service provider

Q7 The Alternative Dispute Resolution scheme is a body that has been approved by Ofcom to provide services to people whose complaints to communications services providers cannot be resolved satisfactorily.

Complaints can be taken to the scheme for two reasons; because the communication provider considers that the complaint cannot be resolved or because twelve weeks have passed since the complaint was originally made to the communications provider.

The scheme is currently provided by Otelio and CISAS and is free to use.

Were you aware of this scheme before now?

Please select one answer

Yes

No

ASK IF CODED 'YES' AT Q7. SKIP TO Q10 IF CODED 'NO' AT Q7.

Q8 Can you recall how you ++first++ heard about this scheme?

Please select one answer

Informed verbally by my service provider

My service provider sent me a letter informing me about my right to go to the scheme

Read about it on my bill from my service provider

Found out about it on my service provider's website

Through other information available through my service provider

Through another organisation such as the Citizen's Advice Bureau, Consumer Direct or Ofcom

Through someone else - a friend, relative or colleague

Other (specify)

Don't know

ASK SEPARATELY FOR EACH TYPE OF PROVIDER CODED 'YES' AT Q5

Q9 For any of your complaints with your provider, did you submit an application to have your complaint considered by the Alternative Dispute Resolution scheme provided by Otelo or CISAS?

Please select one answer for each type of provider

[GRID]

Yes - I submitted an application to have the complaint considered by the ADR scheme provided by Otelo

Yes - I submitted an application to have the complaint considered by the ADR scheme provided by CISAS

Yes - I submitted an application to have the complaint considered by the ADR scheme but I'm not sure who provided it

No

Don't know

RESPONDENTS SHOULD BE ASKED ABOUT ONE COMPLAINT ONLY.

CONSUMER INTERVIEWS

WE WILL COMPLETE 100 INTERVIEWS PER PROVIDER TYPE WITH ADR USERS (CODED 'YES' AT Q9).

WE WILL COMPLETE 150 INTERVIEWS PER PROVIDER TYPE WITH ADR NON-USERS WHO HAD A COMPLAINT LASTING 12+ WEEKS (CODED 'YES' AT Q6 AND 'NO' OR 'DK' AT Q9).

WE WILL COMPLETE 100 INTERVIEWS PER PROVIDER TYPE WITH PEOPLE WHO HAD A COMPLAINT THAT DID NOT LAST 12+ WEEKS (CODED 'YES' AT Q5 AND 'NO' AT Q6).

[CHECK QUOTAS]

SMALL BUSINESS INTERVIEWS

WE WILL AIM FOR 133 INTERVIEWS PER PROVIDER TYPE WITH PEOPLE WHO HAD A COMPLAINT LASTING 12+ WEEKS (CODED 'YES' AT Q6). WE WILL AIM FOR HALF OF THESE INTERVIEWS TO BE WITH ADR USERS (CODED 'YES' AT Q9) AND FEED BACK ON PROGRESS ON A REGULAR BASIS AS THIS IS A 'SOFT QUOTA'.

WE WILL COMPLETE 67 INTERVIEWS PER PROVIDER TYPE WITH PEOPLE WHO HAD A COMPLAINT THAT DID NOT LAST 12+ WEEKS (CODED 'YES' AT Q5 AND 'NO' AT Q6).

[CHECK QUOTAS]

ASK ALL

Q10 What was the nature of your complaint to your (INSERT FROM Q5/Q6/Q9)? If you have made more than one complaint to this provider, please answer in relation to the most recent complaint.

Please select one answer

Mobile

Put on the wrong tariff or package
Phone bill is wrong / over-charging
Inclusive or "free" calls not properly credited
Costs of international and roaming calls
Charged for cancelled services
Pre-pay credit lost or not credited to card
Unexplained premium rate numbers on bill
Charging for ringtones subscription or text messages
Text or voice mails being delivered late
Poor quality WAP or 3G services
Mis-selling of mobile phone services
Unable to keep phone number when switching supplier
Scam text messages
Abusive or threatening calls or text messages
Poor reception/coverage
Problems with call not being connected or disconnected during call
Poor or inaccurate advice from staff
Rude or unhelpful service staff
Problem with handset
Phone contract is unfair
Time taken to speak to someone in customer service
Charge for not paying by direct debit
Other (specify)

Landline

Put on wrong tariff or package
Phone bill is wrong/over-charging
Inclusive or "free" calls not properly credited
Unexplained premium rate numbers of bill
Charged for a cancelled service
Switched company without permission or received bill from wrong company
Poor line quality
Time taken to repair a fault
Time taken to install a line
Damage to property during a repair
Appointment to install or repair equipment missed
Unsolicited sales and marketing calls or faxes
Abusive or threatening calls
Silent calls
Rude or unhelpful customer service
Poor or inaccurate advice from staff
Time taken to speak to someone in customer service
Quality of customer service - other
Phone contract is unfair
Charge for not paying by direct debit
Other (specify)

Broadband

Charged for cancelled service
Overcharged or inaccurate bill from service provider
Unexplained premium rate call on bill
Could not install internet service properly
Problems with Voice over internet/broadband (VOIP)
Unable to get broadband or switch supplier as there is tag/marker/presence/ISP on line
Unable to get broadband - other
Unable to switch internet service provider - other
Connection speed too low
Account suspended
Caps on usage (hours of use or amount downloaded).
Quality of service - other
Unwanted emails/spam
Offensive internet content
Rude or unhelpful sales staff
Poor or inaccurate advice from staff
Contract is unfair
Time taken to speak to someone in customer service
Charge for not paying by direct debit
Other (specify)

Q11 Please select the (INSERT FROM Q5/Q6/Q9) involved in this complaint.

Please select one answer

Mobile

Orange
T-mobile
Vodafone
O2
3
Onetel
Virgin
Tesco
Singlepoint
BT Mobile
Cellular Operations
Carphone Warehouse (Fresh Telecom)
Project Telecom
Value Telecom
Other (specify)

Landline

Alpha Telecom
Argos Telecom
British Gas
BT
Bulldog
Equitalk
Euphony
First Telecom
Gotalk
Home Choice
Just Talk
Kingston Communications
Npower
Virgin Media
One.tel/Centrica
Pipex Homecall/ Homecall
Planet TalkSky Talk
Post Office
Quip
Sainsburys
Sky Talk
Spacetel
Superline
Swiftcall
Talk (Pathfinder Telecom)
Talk More
TalkTalk / Carphone Warehouse
Telco Global
Tele2
Telecom Plus
Tesco Home Phone / Tesco Telecom
Tiscali
Toucan
Vartec
Other (specify)

Broadband

Ace Internet
AOL
BT
BT Broadband
BT Yahoo! Broadband/BT Openworld
Bulldog
Cable & Wireless
Compuserve
Demon
Eclipse Internet
Freedom2Surf
FreeUK
GloInternet
IC24
Netscape
Nildram
Virgin Media

Onetel
Orange
Pipex
Plusnet
Sky Broadband
Supanet
TalkTalk (Carphone Warehouse)
Tesconet
Tiscali / Lineone / Tiny online
VNL
Yahoo
Zen Internet
Zoom
Other (specify)

Q12 What is the status of your complaint with your (INSERT FROM Q5/Q6/Q9)?

Please select one answer

Completely resolved
Partly resolved
Not resolved at all
Don't know

Q13 Thinking about the first call you made to your (INSERT FROM Q5/Q6/Q9) regarding the complaint, which of the following best describes what happened? Please use the 'other' option if none of these accurately reflect what happened.

Please select one answer

The first person I spoke to resolved my complaint
The first person I spoke to assured me they would resolve my complaint without me having to take further steps, but this did not happen
The first person I spoke to said someone would look into my complaint and would call me back (and someone did call me back)
The first person I spoke to said someone would look into my complaint and would call me back (but I was not called back)
The first person I spoke to could not (or would not) resolve my complaint but transferred me to another department
The first person I spoke to could not (or would not) resolve my complaint but transferred me to their manager
The first person I spoke to could not (or would not) resolve my complaint and did not offer to transfer me to someone else (and I did not request to be transferred)
The first person I spoke to could not (or would not) resolve my complaint and refused to transfer me to someone else even though I requested this
The first person I spoke to recommended that I complain to another organisation
Other (specify)

ASK IF CODED 'YES' AT Q7. IF CODED 'NO', SKIP TO Q16

Q14 You mentioned earlier that you were aware of the Alternative Dispute Resolution scheme before now. Were you aware of this scheme when you made your complaint to your (INSERT FROM Q5/Q6/Q9)?

Please select one answer

Yes, I was aware before I made my complaint

No, I became aware during the complaint

No, I was not aware of this until after my complaint was resolved

Don't know

ASK IF CODED 'YES' AT Q7 AND 'NO' OR DK AT Q9 AND 'YES' OR 'NO, I BECAME AWARE DURING THE COMPLAINT' AT Q14 AND 'YES' TO Q6

Q15 Why did you not use the Alternative Dispute Resolution scheme to resolve your complaint with your (INSERT FROM Q5/Q6/Q9)?

ASK IF CODED 'NO' AT Q7 OR 'NO' AT Q14 IF CODED 'YES' AT Q7 AND Q14, SKIP TO Q18

Q16 At what stage do you think your (INSERT FROM Q5/Q6/Q9) should have informed you about the Alternative Dispute Resolution process?

Please select one answer

When I made my original complaint

Within a month of my complaint

Within 3 months of my complaint

3 months after my complaint was made

Don't think they need to inform me

Don't know

Q17 How would you have liked your (INSERT FROM Q5/Q6/Q9) to inform you about the point at which you were eligible to submit an application to the Alternative Dispute Resolution schemes?

Please select one answer

On my bill

By SMS / text message

By phone

By letter

By email

In the terms and conditions for my service

Other (specify)

Don't know

ASK ALL

Q18 Overall, how satisfied were you with the final outcome of your complaint to your (INSERT FROM Q5/Q6/Q9)?

Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Q19 And how easy was it to resolve this complaint with your (INSERT FROM Q5/Q6/Q9)?

Please select one answer on a scale of 1-7 where 1 is 'Very difficult' and 7 is 'Very easy'.

Q20a And how easy was it to get your (INSERT FROM Q5/Q6/Q9) to recognise that you were making a complaint (i.e. that they should take steps to address your dissatisfaction)?

Please select one answer on a scale of 1-7 where 1 is 'Very difficult' and 7 is 'Very easy'.

Q20b And how satisfied were you with your (INSERT FROM Q5/Q6/Q9) with regard to them making it clear how your complaint would be handled (including when you should expect a response and what to do if you remained dissatisfied)?

Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

Q21 And how satisfied were you with the time it took to resolve the complaint you had with your (INSERT FROM Q5/Q6/Q9) on this occasion?

Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

ASK IF CODED 'YES' AT Q9. OTHERS SKIP TO Q23

Q22 And overall how satisfied were you with the Alternative Dispute Resolution scheme itself?

Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

ASK ALL

Q23 Overall, how much time did you spend actively pursuing your complaint with your (INSERT FROM Q5/Q6/Q9), i.e. writing letters, emails, making phone calls etc. until the complaint was resolved (or up until now if the complaint remains unresolved)?

Please enter hours and minutes in the box below

Q24 In total, how much would you say this issue has cost you in monetary terms? Please think about any costs you may have incurred, for example, the size of the original amount charged, the impact of any loss in service, the costs incurred in trying to resolve the problem, and so on.

Please enter the amount in £ in the box below

Q25 We are interested in how you felt during the complaint process. How worried did you feel while trying to resolve the complaint?

Please select one answer on a scale of 1-7 where 1 is 'Not at all worried' and 7 is 'Very worried'.

Q26 How stressful did you find trying to resolve the complaint?

Please select one answer on a scale of 1-7 where 1 is 'Not at all stressful' and 7 is 'Very stressful'.

Q27 How angry did you feel while trying to resolve the complaint?

Please select one answer on a scale of 1-7 where 1 is 'Not at all angry' and 7 is 'Very angry'.

Q28 Which of the following statements best describes what you have done (or plan to do) about your current (INSERT FROM Q5/Q6/Q9)?

Please select one answer

I have already switched to another provider because of this complaint

I am planning to switch to another provider because of this complaint

I am planning to switch to another provider but for other reasons

I have no plans to switch provider

Other (specify)

Don't know

Q29 Do you know whether your (INSERT FROM Q5/Q6/Q9) has a Complaints Code of Practice?

Please select one answer

Yes, I know they have one

No, I know they do not have one

Don't know

ASK IF CODED 'YES' AT Q29. OTHERS SKIP TO Q31.

Q30 Have you read your (INSERT FROM Q5/Q6/Q9)'s Complaints Code of Practice?

Please select one answer

Yes

No

Don't know

Q31 And finally, which of these, if any, limit your daily activities or the work you can do?

Please select all that apply

Breathlessness or chest pains

Poor vision, partial sight or blindness

Difficulty in speaking or in communicating

Poor hearing, partial hearing or deafness

Cannot walk at all / use a wheelchair

Cannot walk far or manage stairs or can only do so with difficulty

Limited ability to reach

Mental health problems or difficulties

Dyslexia

Other illnesses or health problems which limit your daily activities or the work that you can do (specify)

None

Don't know / refused

B. Face-to-Face Omnibus Questionnaire

Q1 Have you made a **complaint** to any of these types of service providers in the last year? This could be a current, ongoing complaint or one that has already been resolved.

A **complaint** is defined as an expression of dissatisfaction made to a service provider related to its products or services, or the complaints-handling process itself, where a response or resolution is expected.

MULTIPLE CODE

Mobile phone service provider
Landline phone service provider
Broadband service provider
Postal service provider
Gas provider
Electricity provider
Financial institution
None of these

**IF CODED 'NONE OF THESE' AT Q1, SKIP TO Q4.
ASK Q2a/b FOR ALL TYPES OF PROVIDER CODED AT Q1 EXCEPT FOR POSTAL SERVICE PROVIDER.**

Q2a [FOR MOBILE PHONE, LANDLINE PHONE AND BROADBAND]
Have any of these complaints taken 12 or more weeks to resolve?

Q2b [FOR GAS, ELECTRICITY AND FINANCIAL]
Have any of these complaints taken 8 or more weeks to resolve?

SINGLE CODE FOR EACH TYPE OF PROVIDER

[GRID]

Yes
No

Mobile phone service provider
Landline phone service provider
Broadband service provider
Gas provider
Electricity provider
Financial institution

**ASK Q3 FOR POSTAL SERVICE PROVIDER IF CODED AT Q1.
ASK Q3 FOR ALL TYPES OF PROVIDER (EXCEPT POSTAL SERVICE PROVIDER)
CODED 'YES' AT Q2a/b.
IF POSTAL SERVICE PROVIDER CODED AT Q1 AND 'NO' FOR ALL OTHER TYPES OF
PROVIDER AT Q2a/b, SKIP TO Q4.**

Q3 Were any of your complaints with your [INSERT FROM Q1/Q2a/b AS RELEVANT]
referred to the ...

SINGLE CODE FOR EACH TYPE OF PROVIDER

[GRID]

Yes

No

Don't know

Alternative Dispute Resolution scheme such as Otelo or CISAS (IF SELECTED
MOBILE, LANDLINE OR BROADBAND AT Q2)

Postal Redress Service (IF SELECTED POSTAL SERVICE AT Q1)

Energy Ombudsman (IF SELECTED GAS OR ELECTRICITY AT Q2)

Financial Ombudsman Service (IF SELECTED FINANCIAL INSTITUTION AT Q2)

ASK ALL

Q4 A number of official bodies exist to provide services to people whose complaints to
service providers cannot be resolved satisfactorily.

Complaints can be taken to these official bodies for two reasons; because the service
provider considers that the complaint cannot be resolved or because a defined period
of time has passed since the complaint was originally made to the service provider.

Which of these official bodies have you previously heard of?

MULTIPLE CODE

Otelo or CISAS – these are the official dispute resolution schemes for mobile phone,
landline phone and broadband services

Postal Redress Service – this is the official dispute resolution scheme for postal
services

Energy Ombudsman – this is the official dispute resolution scheme for gas and
electricity services

Financial Ombudsman Service – this is the official dispute resolution scheme for
financial services

None of these

**IF CODED 'NONE OF THESE' AT Q4, CLOSE INTERVIEW.
ASK Q5 FOR ALL OF THE ANSWERS CODED AT Q4.**

Q5 Can you recall how you first heard about the ... ?

(REPEAT FOR ALL ANSWERS CODED AT Q4)

Please select one answer

Informed verbally by my service provider

My service provider sent me a letter informing me about my right to go to the official body

Read about it on my bill/statement from my service provider

Found out about it on my service provider's website

Through other information available through my service provider

Through another organisation, such as the Citizen's Advice Bureau, Consumer Direct or an industry regulator

Through someone else - a friend, relative or colleague

Other (specify)

Don't know