

# HMRC Contact Centres Survey Report 2012-2013

HM Revenue and Customs Research  
Report Number 271



Luke Taylor and Rosanna Currenti



**TNS BMRB**

10.07.2013

JN 260108171  
Controlled document - Issue 5





The views expressed in this report are those of the authors' and do not necessarily represent those of HM Revenue and Customs.'

© Crown Copyright 2013

Copyright in the typographical arrangement and design rests with the Crown. This publication may be reported free of charge in any format or medium provided that it is reproduced accurately and not used in a misleading context. The material must be acknowledged as Crown copyright with the title and source of the publication specified.

Published by HM Revenue and Customs, September 2013.

[www.hmrc.gov.uk](http://www.hmrc.gov.uk)

# Executive summary

HMRC Contact Centres provide a national telephone service for dealing with enquiries from HMRC customers. The main aim of this research project is to measure the experience of customers using the contact centres, in order to allow HMRC to better understand their customers' needs and work to improve their overall experience.

The survey started in October 2010 and covers all lines of business and contact centres. This report covers the results for April 2012 to March 2013; comparisons have been made to the results from April 2011 to March 2012 where possible.

## Overall customer experience

Overall scores were very positive:

- 81% rated their overall experience as very good or fairly good. This had not changed significantly since the previous year.
- Experience of calling the helpline was better than expected for two-fifths of customers (39%) and in line with expectations for half of customers (50%). Compared with the 2011 to 2012 results, the proportion that rated their experience as better than expected increased by four percentage points.

Key Driver Analysis (KDA) revealed that to improve the overall experience score further, ease of getting in touch and getting things right the first time were key areas for improvement. The Key Driver Analysis was also performed on the three different business groups and showed that ease of getting in touch was far more important for Personal Tax and Business Tax customers than for Benefits and Credits customers. Getting things right the first time was more important for Business Tax customers than for other customers.

## Ease of getting in touch

Most respondents only had to call once to get through to an adviser (71%). This was a significant increase on the 2011 to 2012 results, when 67% reported calling just once.

The call waiting time was on average 4 minutes 30 seconds (median), although (40%) reported waiting less than 3 minutes. Reported waiting times had not changed significantly since 2011-2012; this is a positive result as waiting times had increased between October 2010-March 2011 and October 2011-March 2012, and there was a risk that this trend would continue. Given that the KDA revealed that ease of getting in touch is a key factor driving overall experience, this is an area which could be targeted for improvements.

Two-thirds (68%) said that it was very or fairly easy to get in touch with the helpline.

Looking at the results by business groups, customers who phoned Business Tax helplines waited less time on average to get through than others (a median time of 2 minutes 30 seconds). Customers of the Personal Tax helplines were least likely to say it was very or fairly easy to get in touch (65%); however, this had increased from 61% in April 2011-March 2012 .

### **First contact resolution**

Just over two-thirds (70%) reported talking to an adviser once about their issue and a fifth (23%) said they had spoken to advisers two or three times.

Four-fifths (83%) said that the number of times they spoke to an adviser about the issue was acceptable. This score varied according to the number of times customers had spoken to an adviser, 69% of those who spoke to an adviser two or three times thought it was acceptable and 29% of those who spoke to an adviser four or more times thought it was acceptable.

### **Advisers**

Customers were generally very positive towards advisers:

- 94% felt the adviser had treated them well
- 92% agreed that the adviser had understood their query
- 90% said it was easy to understand the information provided by the adviser
- 88% agreed that the adviser had sufficient expertise to deal with their query

- 86% said it was easy to understand what they had to do next to resolve their query

At the overall level, the results had not changed significantly compared with April 2011-March 2012.

The National Insurance helpline scored higher than any other helpline in all of these areas and was typically found to outperform other Personal Tax lines. The VAT & VAT Online helpline was typically found to score well, however, it did not rate favourably compared to the other helplines in terms of how easy its customers found it to understand what to do to resolve the query– this could be an area for improvement.

## **Improvements**

A third of customers felt that no improvements were needed (36%).

The most common suggestions respondents spontaneously gave for improvements were:

- Improve the time taken to get through to an adviser (32%)
- Have better trained / more knowledgeable staff (14%)
- Remove the automated messages at the start of calls (10%)

The KDA results reinforce the improvements spontaneously given by respondents. Ease of getting in touch was an area highlighted as needing improvement in the KDA and the top improvement given spontaneously was to improve the time taken to get through to a member of staff.

Similarly, getting things right the first time was an area which the KDA suggested should be focused on for improvements. This is likely to be related to the levels of training and knowledge of staff which was the improvement 14% of respondents spontaneously said they wanted to see.

# Contents

1. Introduction .....	1
2. Customer experience .....	6
3. Getting in touch with the helpline .....	15
4. First contact resolution .....	23
5. Helpline advisers .....	31
6. Improvements.....	41
7. Conclusions.....	44
Appendix 1 – Demographic analysis .....	46
Appendix 2 – Questionnaire .....	50
Appendix 3 - Sample profile .....	62





# **1. Introduction**

## **1.1 Background and survey aims**

HMRC Contact Centres provide a national telephone service for dealing with enquiries from HMRC customers. HMRC Contact Centres operate over 17 sites in the UK and deliver 23 dedicated customer helplines. Every year approximately 73 million calls are received by the Department from people who are seeking help or information about their tax affairs or entitlement to tax credits and benefits. As contact centres are at the frontline of HMRC service delivery, their work is key to the Department's vision of improved customer experience.

The main aim of this research project is to measure the experience of customers using the contact centres, in order to allow HMRC to better understand their customers' needs and work to improve their overall experience.

## **1.2 Methodology**

The target population for this survey consisted of customers who had phoned an HMRC helpline. Sample was collected by the helpline advisers in 200 randomly selected one hour slots, and then transferred to TNS BMRB every fortnight. Records were randomly selected for interview and were then loaded into the telephone interviewing software. Interviews were conducted with each batch of sample for up to two weeks, to ensure that customers were interviewed while their experience was fresh in their minds. New sample was loaded into the system every fortnight.

Over the twelve month period there were 107,104 calls made to contact centres during the timeslots selected for sampling. Out of these calls 106,356 customers (99% capture rate) were asked to take part and 43,089 customers agreed to participate in the survey (41% participation rate). Of these, 8,940 were randomly selected for the survey. 14% of these customers could not be contacted because the number recorded for them was incorrect, so that the effective survey sample was 7,708.

In total, 4,417 interviews were conducted between March 2012 and April 2013 and the response rate, based on the effective sample, was 57%.

**Table 1 : Survey outcomes**

	<b>Number</b>	<b>Percentage (total)</b>	<b>Percentage (effective total)</b>
<b>Total sample issued</b>	8,940	100%	N/A
Bad sample / wrong number	1,232	14%	N/A
<b>Total effective sample</b>	7,708	86%	100%
Total interviews conducted	4,417	49%	57%
Refusals	1,063	12%	14%
No contacts	2,228	25%	29%

The sample was weighted to compensate for variation in sampling probabilities and to remove design bias. Further calibrations were applied based on call volume data provided by HMRC to ensure that each helpline group was represented proportionately.

### **1.3 Coverage of the report**

This report covers the survey findings for the 2012 to 2013 financial year and covers all lines of business and contact centres. Where possible, this report compares the 2012-2013 results with the 2011-2012 results.

For the purpose of this report when referring to the overall sample this includes all sites and lines of business that were sampled. For all questions results have been examined by the three main business groups, which categorise different lines of business handled by the helplines.

**Benefits and Credits** refers to:

- Tax Credits
- Tax Credits Debt Management and Banking (TC DMB)
- Child Benefit

**Personal Taxes** refers to:

- Taxes
- Online Services Helpdesk (OSH)
- Construction Industry Scheme (CIS)
- Child Trust Fund (CTF)
- Orderline
- Employers helpline
- All National Insurance helplines

**Business Tax** refers to:

- VAT and VAT Online
- Excise
- Stamps

Furthermore, results are reported separately for the seven lines of business where sufficient interviews were achieved over the year for individual analysis; Tax Credits, Taxes, Child Benefit, OSH, National Insurance, VAT & VAT Online and Employers Helpline<sup>1</sup>.

## **1.4 Significant differences**

In reporting of the results, tests have been carried out for statistical significance to ensure that the differences highlighted are *real* differences and not differences that might be observed because a sample was surveyed, rather than the whole population. For the purposes of this report, any differences commented on were found to be significant at the 95% confidence level.

The design effects caused by the weighting and the clustering of the sample collection (caused by only collecting sample during specific timeslots) were calculated and used when checking the results for significance.

---

<sup>1</sup> In the report for April 2011 to March 2012, results were not broken down by VAT & VAT Online and Employers Helpline as fewer than 100 interviews were conducted with customers of these lines of business.

## 1.5 Sample profile

The following tables show the weighted and unweighted profile of the sample.

**Table 2 : Sample profile – Line of business**

	Unweighted		Weighted
	Count	%	%
Taxes	1754	40%	36%
Tax credits	1650	37%	40%
National Insurance (NI)	290	7%	7%
Child Benefit	227	5%	5%
Online Services Helpdesk (OSH)	147	3%	3%
VAT & VAT Online	115	3%	3%
Employers Helpline	101	2%	2%
Construction Industry Scheme (CIS)	60	1%	2%
Orderline	44	1%	1%
Tax Credits Debt Management and Banking (TC DMB)	17	0%	0%
Stamps	5	0%	0%
Excise	5	0%	0%
Construction Trust Fund (CTF)	2	0%	0%

**Table 3 : Sample profile – Site**

	Unweighted		Weighted
	Count	%	%
Bathgate	500	11%	12%
Longbenton	458	10%	10%
Newcastle	397	9%	9%
Liverpool	344	8%	7%
Cardiff	300	7%	7%
East Kilbride	289	7%	6%
Peterlee	289	7%	6%
Dundee	227	5%	6%
Bradford	224	5%	5%
Sunderland	224	5%	5%
Manchester	223	5%	5%
Merry Hill	213	5%	5%
Glasgow	202	5%	5%
Lillyhall	190	4%	4%
St Austell	154	3%	4%
Portsmouth	113	3%	2%
Belfast	70	2%	2%

**Table 4 : Sample profile – Type of caller**

	Unweighted		Weighted
	Count	%	%
Individual	4274	97%	97%
Agent	56	1%	1%
Business	87	2%	2%

Further details on the demographic breakdown of individuals who contacted the helplines and the nature of the calls made to the helplines have been appended.

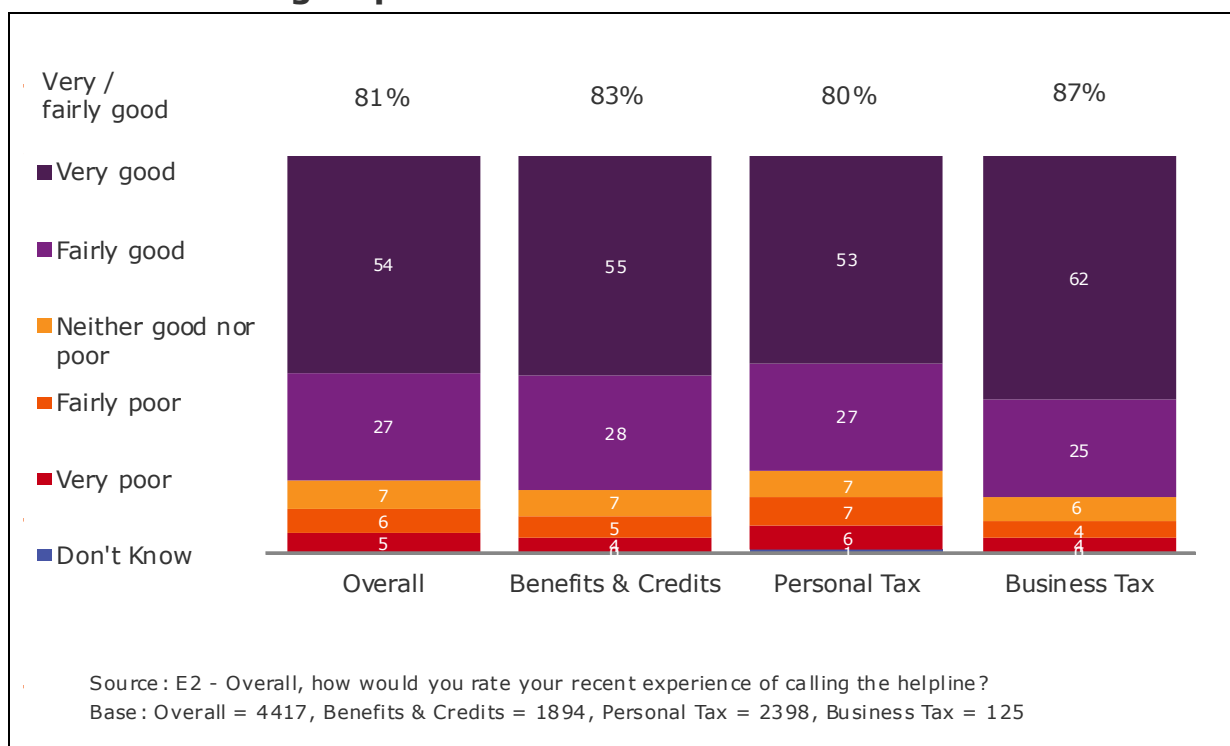
## 2. Customer experience

### 2.1 Overall rating of the experience of calling the helpline

#### 2.1.1 Total and trend results

Customers were asked, putting aside the outcome of the call, to rate their experience of calling the helpline using a five point scale ranging from very good to very poor. Customer sentiment was largely positive, 81% of respondents gave an answer of either very good or fairly good to this question. Customer satisfaction has remained consistently high over time, with 82% of respondents interviewed between April 2011 – March 2012 rating their experience as either very or fairly good (not significantly different from April 2012 – March 2013).

**Chart 5 Overall rating of recent experience - across the three main business groups**



#### 2.1.2 Sub-group analysis

Whilst largely positive, there were some differences between the three main business groups. Customers calling the Business Tax helplines had the most positive experience, with 87% rating their experience as very or fairly good, significantly greater than those calling the Personal Tax

helpline (80%). The scores for the three main business groups were not found to have changed significantly compared with the 2011-2012 survey. However, last year customers calling the Benefits and Credits helplines were found to be significantly more likely than those contacting the Personal Tax helplines to rate their experience positively (85% and 79%) and this was no longer the case.

Differences were also found across the seven main helplines. As stated above, the Personal Tax helplines generally scored lower than the Benefits and Credits helplines; the only exception to this was NI which respondents rated the most positively out of all the helplines. Along with the NI helpline, the Child Benefit helpline also achieved one of the highest levels of customer satisfaction, and the proportion of customers rating their experience as very good or good was significantly higher than for Tax Credits, Taxes and OSH.

**Table 6 Overall experience - across seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% very / fairly good recent experience of calling the helpline</b>
NI	290	91%
Child Benefit	227	88%
VAT & VAT Online	115	86%
Employers	101	83%
Tax Credits	1650	82%
Taxes	1754	78%
OSH	147	72%

There were no significant changes by line of business compared with April 2011 to March 2012.

### **2.1.3 Factors contributing to positive customer experience**

There were a number of questions which were positively correlated with the overall customer experience scores. Customers that rated the measures shown in Table 7 highly were also more likely to have higher overall experience scores. This suggests that these measures are closely related to overall experience, if improvements are focused in these areas it is likely that peoples' overall experience will improve.

Ease of getting in touch with a helpline adviser was highly correlated, with 93% of those selecting very or fairly easy at this question having a good experience calling the helpline, compared with overall figures of 81%. The number of times customers had to speak to an adviser about the issue also had a significant impact, with 91% of those who found this very or fairly acceptable rating their overall experience as either very good or good.

How good or poor the helpline adviser was at getting things right the first time was a key factor. Nearly all (92%) respondents who rated the helpline very good or good at getting things right the first time gave a positive answer in relation to their overall experience.

Finally, ease of understanding what to do next to resolve the query also played a role in the customer experience, with those rating this as easy being significantly more likely to have a positive experience of calling the helpline (87%).

**Table 7 Groups with high experience ratings**

	<b>Base</b>	<b>% very / fairly good recent experience of calling the helpline</b>
Overall sample	4,417	81%
Very/fairly easy to get in touch with the helpline	2,994	93%
Very/fairly acceptable the number of times had to speak to an adviser	3,650	91%
Very/fairly good at getting things right the first time	3,481	92%
Very/fairly easy to understand what to do next	3,770	87%

Source: E2



## 2.2 Key Driver Analysis

### 2.2.1 Methodology

In the previous section, correlations between different variables and overall experience of calling the helpline were examined, however a drawback with this standard bi-variate analysis approach is that other factors that may be underlying the differences seen between two groups cannot be controlled for. Multivariate regression analysis can circumnavigate this problem. It allows for multiple variables to be included in the model at the same time and therefore can measure the change in overall experience when only one variable is changed and all others are held constant.

Key Driver Analysis was carried out using multivariate analysis of the overall rating of the respondents' experience of calling the helpline. This analysis produced a list of drivers together with an indication of their relative importance to respondents in terms of their overall experience.

The final analysis plots importance against performance for each of the drivers in a quadrant diagram. The relative importance of each driver - an output from the regression which shows the importance to respondents in terms of their overall experience - is plotted on the horizontal axis. The performance score for each driver is plotted on the vertical axis and is based on the percentage of respondents that gave a positive answer to the question within the survey.

This plot is then divided into four with lines at the median importance and performance scores. The key area in this diagram is the quadrant to the bottom right - issues in this quadrant are those of high customer importance but low perceived performance, relative to the other issues. Drivers in this quadrant should be the main focus for improvement to improve overall experience. Those in the bottom left are issues of relatively low performance, but also lower importance, and are therefore issues for secondary improvement. The top right quadrant contains issues of high importance, but also of higher performance relative to other issues and these are issues that need to be maintained in order to keep ratings high.

Red shading is used in the bottom right quadrant to signify key areas for improvement, amber shading for secondary areas for improvement in the

bottom left and green shading for areas to maintain in the top right and to a lesser extent in the top left.

$R^2$ , also known as the coefficient of determination, is the proportion of variability in the data that is explained by the regression model. An  $R^2$  of 1 indicates that the regression line perfectly fits the data, whereas a 0 indicates that the regression model does not explain the data at all. For this model the  $R^2$  statistic was found to be 0.60, this means that 60% of the variance is explained by the model, this is a very good result for cross-sectional survey data.

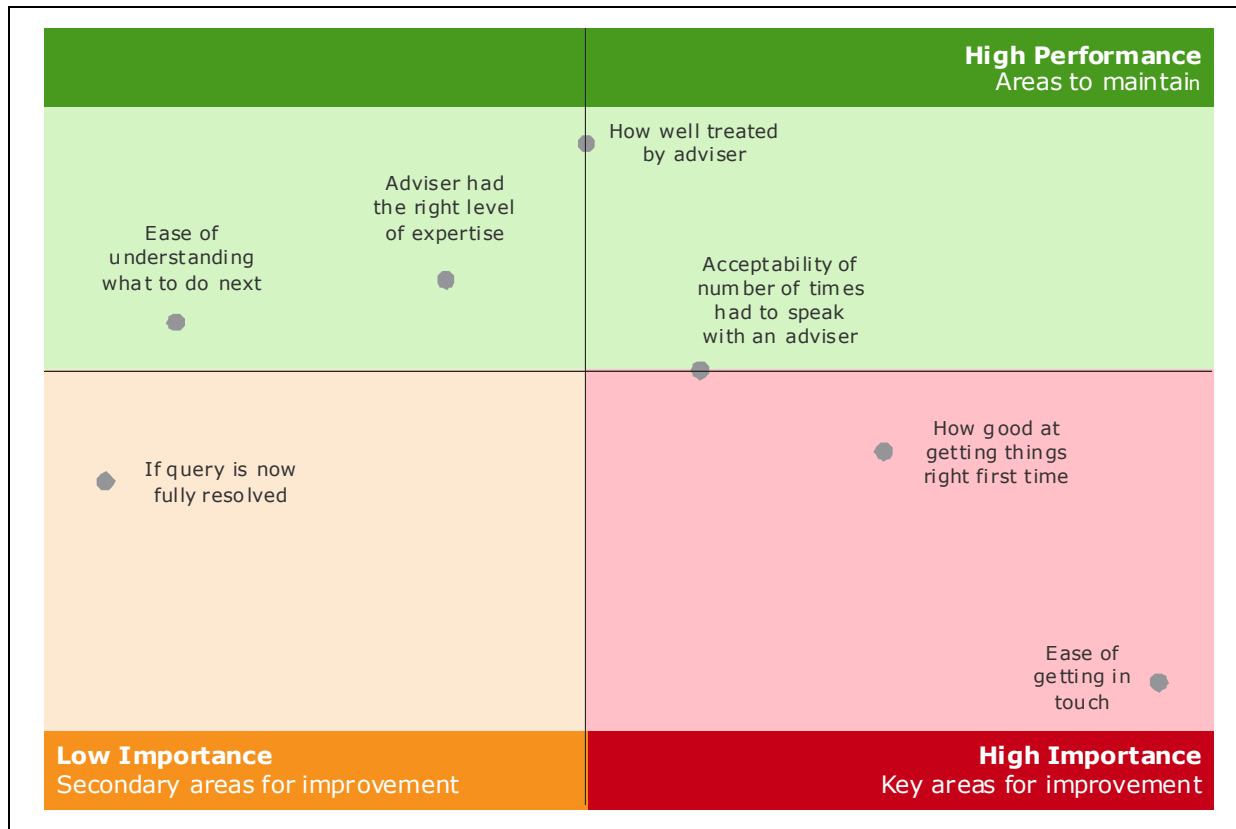
### 2.2.2 Findings

Table 8 shows all of the customer experience measures ranked in order of influence on the overall experience. This was generated from the first iteration of the Key Driver Analysis. Issues that were strongly correlated or had very low influence were then removed and the analysis was re-run. The final results of the analysis are shown in the quadrant chart that follows.

**Table 8 Influence of different factors on overall experience**

<b>Customer Experience</b>	<b><math>\beta</math></b>
Ease of getting in touch	0.188
How good at getting things right first time	0.183
Acceptability of number of times had to speak with an adviser	0.154
How well treated by adviser	0.130
Adviser had the right level of expertise	0.099
Length of time waiting on phone before spoke with an adviser	0.075
Ease of understanding what to do next	0.054
If query is now fully resolved	0.051
Number of times called helpline before call was answered	0.033
Ease of understanding information provided by adviser	0.019
Agreement that adviser understood the query	0.015

**Chart 9 Key Driver Analysis Quadrant**



R<sup>2</sup>=0.60

The Key Driver Analysis results remain similar to those in the 2011 to 2012 report. Ease of getting in touch and getting things right the first time remain areas of high importance which could perform better. These two issues are key areas for improvement.

As for last year, the performance scores were high in the acceptability of the number of times customers had to speak with an adviser and how well customers felt advisers treated them, and these need to be maintained to keep the overall experience rating high.

The main secondary area for improvement is to make sure that queries are fully resolved, where performance is relatively poor but the importance of this factor to overall experience is also lower.

### 2.2.3 Results by business group

The regression analysis was also carried out separately for each of the three business groups to determine whether the influence each factor had on overall experience varied.

All of the customer experience measures that were found to be significant at the overall level were included in the analysis. The full results are shown in Table 10.

Ease of getting in touch was found to be more important for Personal Tax and Business Tax helplines than for Benefits and Credits. It was far more important for Business Tax customers that advisers had the right level of expertise than for customers of the other two business groups. For Benefits and Credits customers how well the adviser treated them and how acceptable the number of times they had to speak to an adviser were found to be of higher importance.

**Table 10 Influence of different factors on overall experience**

<b>Customer Experience</b>	<b>Benefits &amp; Credits</b>	<b>Personal Tax</b>	<b>Business Tax</b>
	<b><math>\beta</math></b>	<b><math>\beta</math></b>	<b><math>\beta</math></b>
Ease of getting in touch	0.19	0.29	0.29
How good at getting things right first time	0.23	0.17	0.33
How well treated by adviser	0.16	0.14	0.12*
Adviser had the right level of expertise	0.09	0.13	0.18
Acceptability of number of times had to speak with an adviser	0.18	0.16	0.06*
Ease of understanding what to do next	0.06	0.08	0.02*
If query is now fully resolved	0.09	0.04	0.00*
<i>R</i> <sup>2</sup>	<i>0.62</i>	<i>0.60</i>	<i>0.54</i>

\*These were not significant in the regression model.

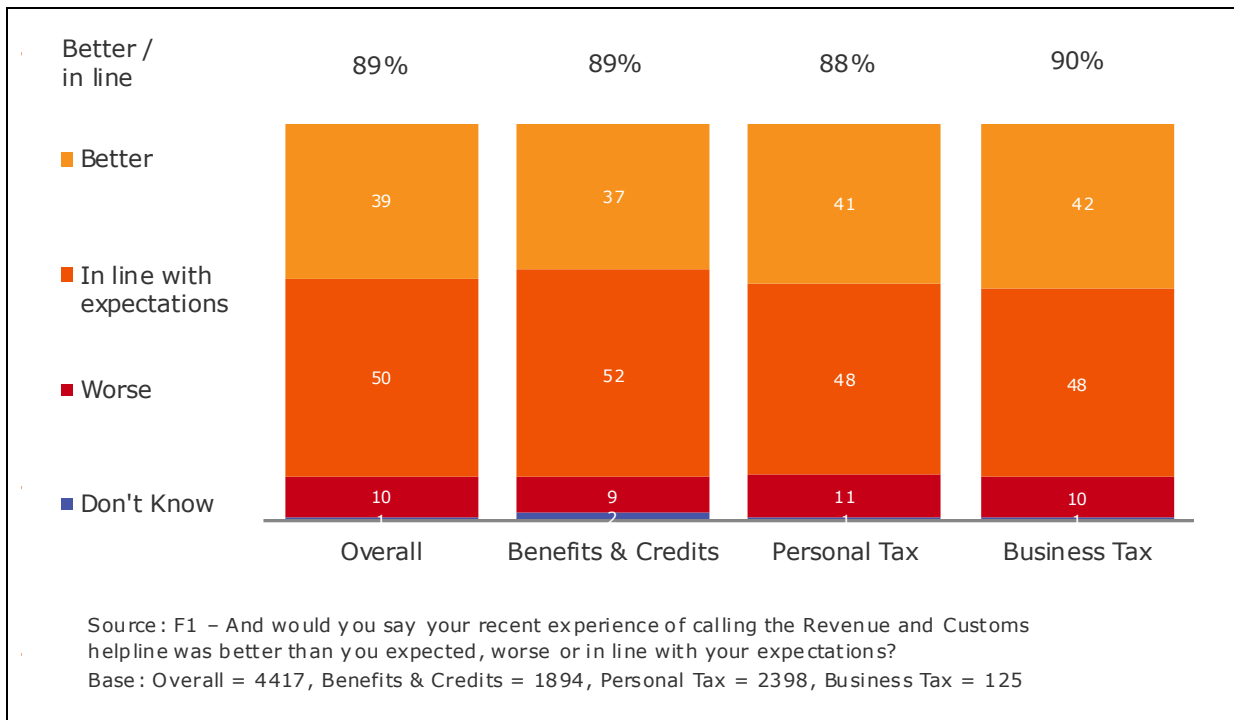
## 2.3 Experience of calling the helpline compared with expectations

### 2.3.1 Total and trend results

Customers were also asked whether their experience of calling the helpline was better, worse or in line with their expectations. Overall, the great majority of customers rated their experience of calling the helpline as either better (39%), or in line with their expectations (50%).

Compared with April 2011 – March 2012, there has been an increase in the proportion of respondents that reported their experience as being better than expected (up four percentage points).

**Chart 11 Experience of calling the helpline compared with expectations - across the three key business groups**



### 2.3.2 Sub-group analysis

Results were found to vary somewhat by business group; customers who contacted the Personal Tax helplines were more likely to say their experience was better than expected (41%) than Benefit and Credit helpline customers (37%). Compared with the 2011-2012 survey, the proportion of Personal Tax customers who found their experience better than expected increased from 37% to 41%. The proportion of customers

who found the experience worse than expected was similar across the three business groups and had not changed significantly in the last year.

The average scores for the business groups disguise the fact that the performance of individual lines of business within each group can be varied. For instance, although Benefits and Credits scored lower than Personal Taxes, this is due to the performance of the Tax Credits helpline (whereas Child Benefits was rated fairly highly).

NI customers were significantly more likely than Taxes, Tax Credits, OSH and Employers helpline customers to have found the experience better than expected. Results for the seven lines of business are shown in Table 12.

**Table 12 Experience of calling the helpline compared with expectations - across seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% Better</b>	<b>% Worse</b>	<b>% In line</b>
NI	290	52%	5%	43%
Child Benefit	227	46%	5%	48%
VAT & VAT Online	115	40%	11%	49%
Taxes	1754	39%	12%	48%
Tax Credits	1650	37%	10%	52%
OSH	147	36%	14%	50%
Employers	101	28%	9%	61%

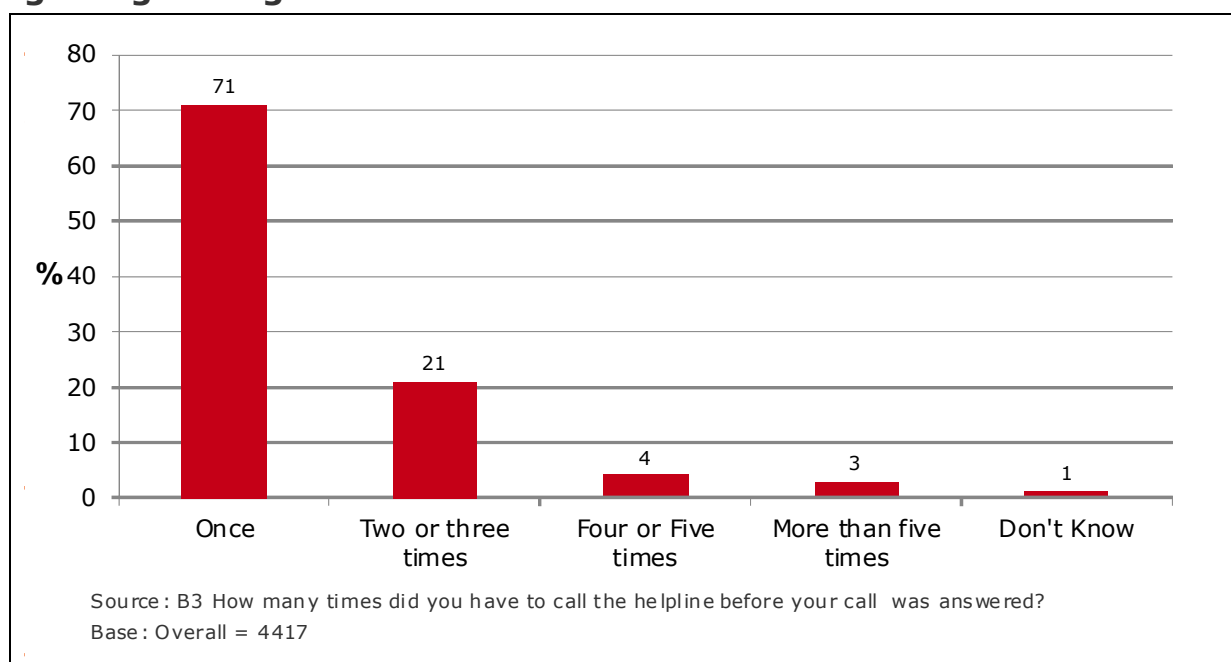
# 3. Getting in touch with the helpline

## 3.1 Number of times customers called the helpline before being able to speak to an adviser

### 3.1.1 Total and trend results

Customers were asked a series of questions relating to how easy or difficult they found it to get in touch with the helpline. The first question required respondents to identify how many times they had to call the helpline before their call was answered. The results revealed that over two-thirds (71%) of respondents had called just once and a fifth (21%) had to telephone two or three times before their call was answered.

**Chart 13 Number of times customers called the helpline before getting through – overall results**

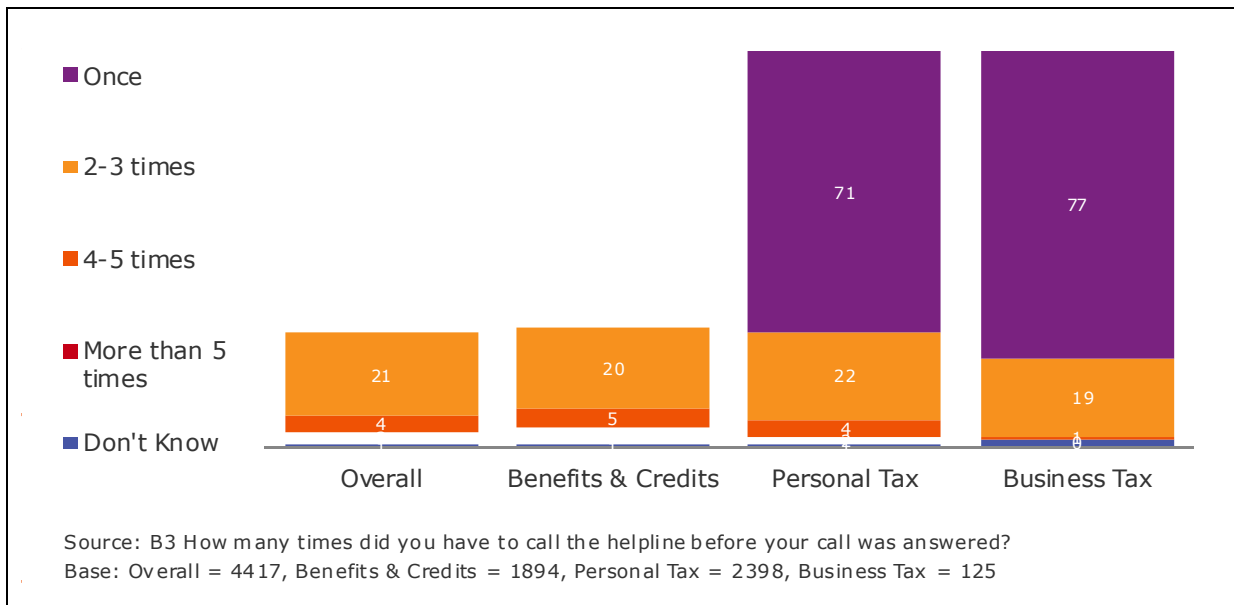


Analysis was also undertaken to identify how much results had changed over time; the proportion of respondents who had to call only once before their call was answered has increased in the last year from 67% to 71%.

### 3.1.2 Sub-group analysis

There was also very little variability across each of the three main business groups; no significant differences were observed. Compared with April 2011- March 2012 the percentage of customers who had to call Personal Tax helplines only once before their call was answered increased (from 67% to 71%).

**Chart 14 Number of times customers called the helpline before getting through - across the three key business groups**



Customers calling the Child Benefit helpline were more likely to get through on their first attempt than those calling the Taxes, Tax Credits and OSH helplines.

**Table 15 Number of times customers called the helpline before getting through - across seven main lines of business**

Helpline	Base	% Once	% Two or three	% Four or more
Child Benefit	227	83%	12%	5%
VAT & VAT Online	115	76%	20%	1%
Employers	101	76%	15%	6%
NI	290	76%	20%	3%
Taxes	1754	70%	23%	6%
Tax Credits	1650	69%	21%	9%
OSH	147	67%	25%	8%



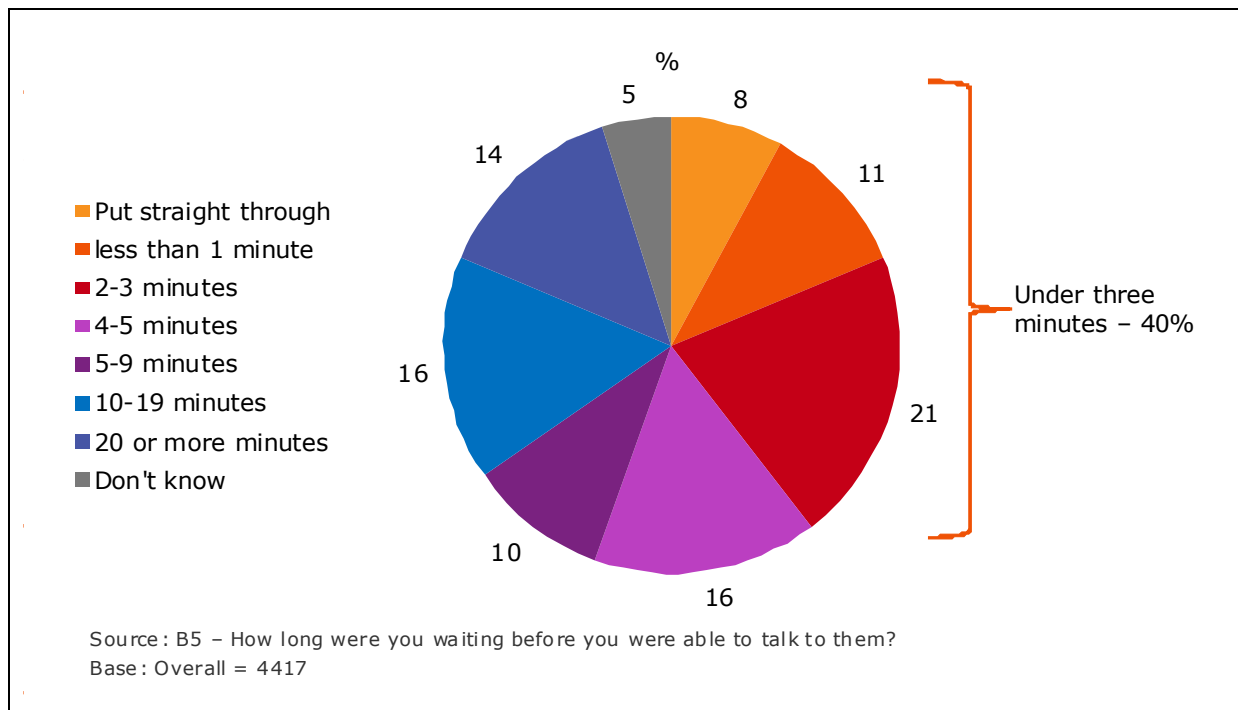
## 3.2 Call waiting times

### 3.2.1 Total and trend results

Respondents were asked to state how long they had to wait before being put through to a helpline adviser. Two-fifths (40%) reported waiting under three minutes, a quarter (25%) between four and nine minutes and a third (31%) over ten minutes. The median waiting time was found to be 4 minutes 30 seconds.

When comparing the results with those from April 2011 – March 2012 no significant differences were observed. This is a positive result, because in the previous report the median waiting time between October 2010 - March 2011 and October 2011 - March 2012 was found to have increased and there was a risk that this trend would continue.

**Chart 16 Time waited on the phone before speaking to an adviser – overall results**

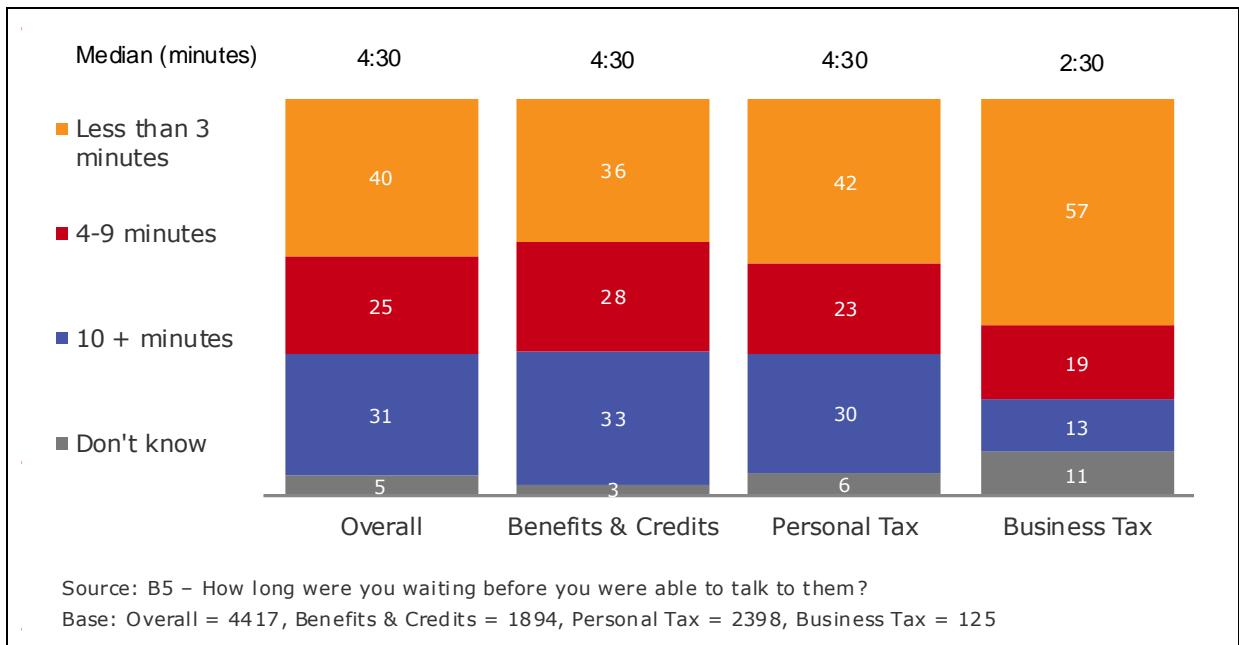


### 3.2.2 Sub-group analysis

Differences in call waiting time were also analysed across the three main business groups. The Business Tax helplines had a significantly shorter waiting time than the Personal Tax and Benefits and Credits helplines. Waiting times for the Benefits and Credits and Personal Tax helplines were very similar, with median waiting times of four and a half minutes.

The results for the three different business groups had not changed significantly compared with April 2011 to March 2012.

**Chart 17 Time waited on the phone before speaking to an adviser – across the three main business areas**



Results were also analysed by the seven main lines of business. NI customers did not have to wait for as long as Child Benefit, OSH, Taxes, Tax Credits and Employers helpline customers to speak to an adviser; they were significantly more likely to have got through in under three minutes.

The lines of business with the longest waiting times were Taxes and Tax Credits, their customers were more likely than those for OSH, Child Benefit, VAT & VAT Online and NI to have had to wait for ten minutes or more.

**Table 18 Time waited on the phone before speaking to an adviser - across seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% Less than three</b>	<b>% Four to nine</b>	<b>% 10 mins or more</b>
NI	290	56%	20%	15%
VAT & VAT Online	115	55%	20%	13%
Child Benefit	227	46%	30%	20%
OSH	147	44%	19%	24%
Taxes	1754	38%	24%	34%
Tax Credits	1650	34%	28%	34%
Employers	101	29%	29%	29%

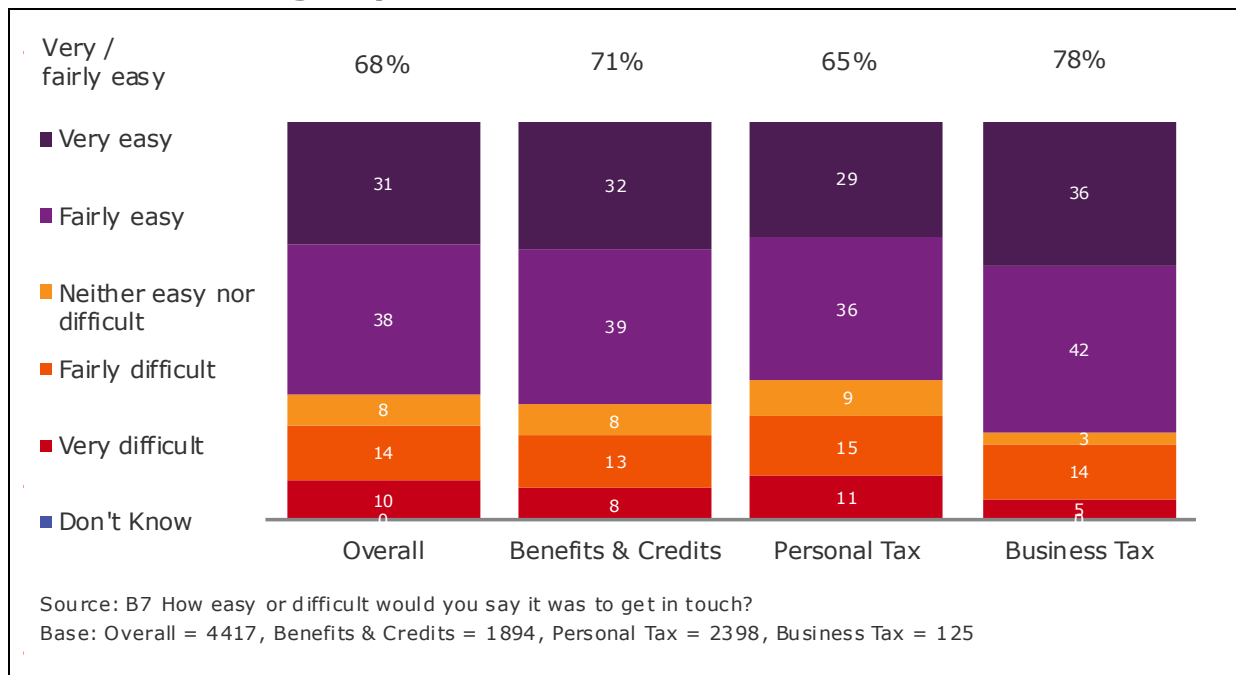
### 3.3 Overall ease of getting in touch with the helpline

#### 3.3.1 Total and trend results

Customers were asked to rate how easy or difficult they felt it was overall to get in touch with the helpline, on a five point scale ranging from very easy to very difficult. Overall results for the last year were positive, with two-thirds (68%) finding it very or fairly easy.

Results have not changed significantly over time, 66% of those respondents surveyed between April 2011 and March 2012 rated their ease of getting in touch as very or fairly easy, compared with 68% of those questioned between April 2012 and March 2013.

**Chart 19 Ease of getting in touch – overall and across the three main business groups**



#### 3.3.2 Sub-group analysis

There were significant differences across the three main business groups. Personal tax customers found it significantly less easy to get in touch with the helpline than Benefits and Credits and Business Tax helpline customers.

Despite the fact that Personal Tax helplines were found to be harder to get in touch with than the other two business groups, reported customer experience has improved over the last year. Between April 2011 and

March 2012 61% of customers found it very or fairly easy to get in touch, compared with 65% of customers between April 2012 and March 2013.

Differences were also observed across the seven main helplines. As in 2011 to 2012, Child Benefit and NI were rated the easiest to contact and these results were significantly higher than for Tax Credits, Taxes, Employers and OSH. Again, NI was found to outperform the other Personal Tax helplines which tended to be the worst scoring.

**Table 20 Ease of getting in touch – seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% very / fairly easy to get in touch</b>
NI	290	82%
Child Benefit	227	80%
VAT & VAT Online	115	75%
Tax Credits	1650	70%
Employers	101	67%
Taxes	1754	62%
OSH	147	56%

Although Taxes was still rated as one of the lines of business hardest to get in touch with, the proportion saying it was very or fairly easy to get in touch with increased compared with April 2011 to March 2012 (from 57% to 62%).

### **3.3.3 Factors contributing to ease/difficulty of getting in touch**

As shown in Table 21, a range of different factors were identified as contributing to customers' perceived ease or difficulty of getting in touch with the helpline.

Respondents with a call waiting time of less than three minutes were significantly more likely to find it easy to get in touch with the helpline (89% compared with the overall figure of 68%). This was significantly greater than those waiting either four to nine (72%) or ten or more minutes (38%).

Those customers who made one call before it was answered were also significantly more likely to rate getting in touch as very or fairly easy,

with 80% of one call customers selecting this response. This contrasts sharply to those customers who had to call the helpline four times or more, with just 19% of these callers finding it easy to get in touch.

Those who spoke to an adviser once about the issue were also more likely to have said they found it very or fairly easy to get in touch (74%) than those who spoke to an adviser more than once.

**Table 21 Groups that found it easiest to get in touch with the helpline**

	<b>Base</b>	<b>% very/fairly easy to get in touch with the helpline</b>
Overall sample	4,417	68%
Call waiting time less than three minutes	1,759	89%
Answered on first call	3,146	80%
Spoke only once to helpline adviser about the issue	3,075	74%

Source: B7

## 4. First contact resolution

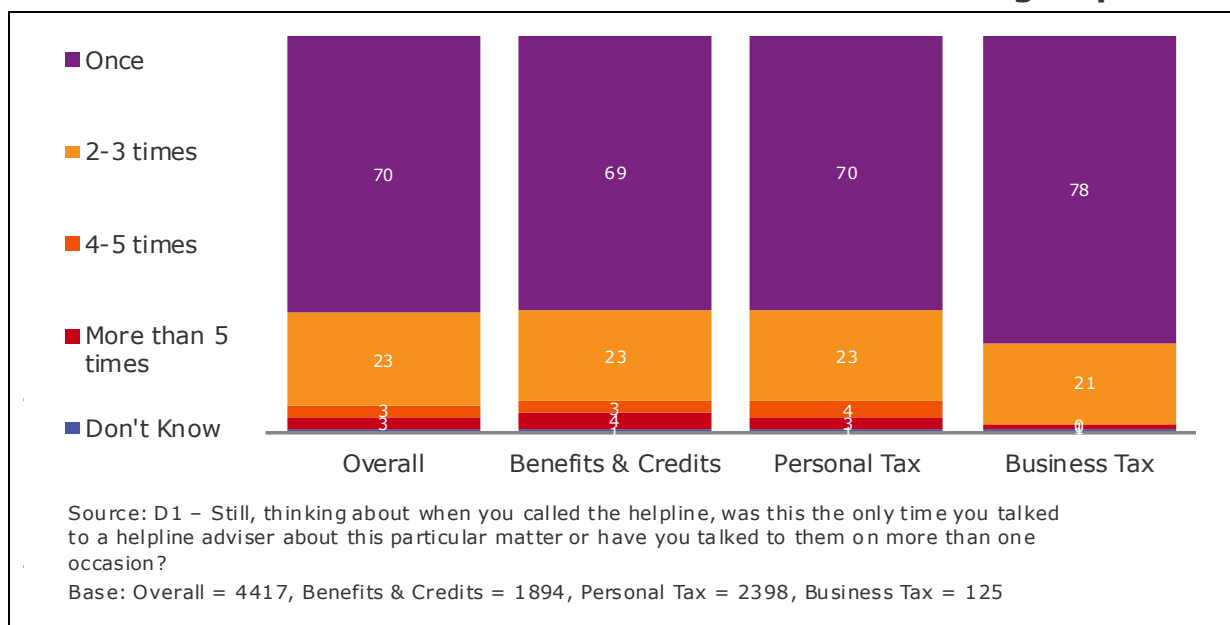
### 4.1 Number of times the customer had to speak to an adviser about the issue

#### 4.1.1 Total and trend results

Respondents were asked how many times they had spoken to a helpline adviser about the issue they were phoning about when asked to participate in the survey. The majority of customers said they had spoken just once about their issue (70%) and just under a quarter (23%) had spoken to an adviser two or three times.

Year-on-year there was no significant change at this question, 69% of customers surveyed between April 2011 and March 2012 spoke to an adviser once.

**Chart 22 The number of times spoken to a helpline adviser about the issue – overall and across the three main business groups**



#### 4.1.2 Sub-group analysis

78% of the Business Tax helpline customers reported calling just once, compared with 69% of Benefits and Credits customers, a significant difference. The results for each line of business were not found to have changed compared with the 2011 to 2012 financial year.

Looking at the results by lines of business, VAT & VAT Online, NI and Child Benefit customers were more likely than Tax Credits and Taxes customers to have only spoken once to advisers. This highlights the fact that the overall Benefits and Credits score was significantly lower than Business Tax as a result of the Tax Credits helpline, Child Benefit scored well at this measure and was on par with the Business Tax helplines.

**Table 23 The number of times spoken to a helpline adviser about the issue – seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% Once</b>
VAT & VAT Online	115	78%
NI	290	76%
Child Benefit	227	76%
Employers	101	72%
OSH	147	68%
Tax Credits	1650	68%
Taxes	1754	68%

## **4.2 Whether the query was fully resolved**

### **4.2.1 Total and trend results**

Customers were asked whether or not their query had now been resolved. The vast majority of customers said their query was fully resolved (78%). This was not significantly different from the results from last year (79%).

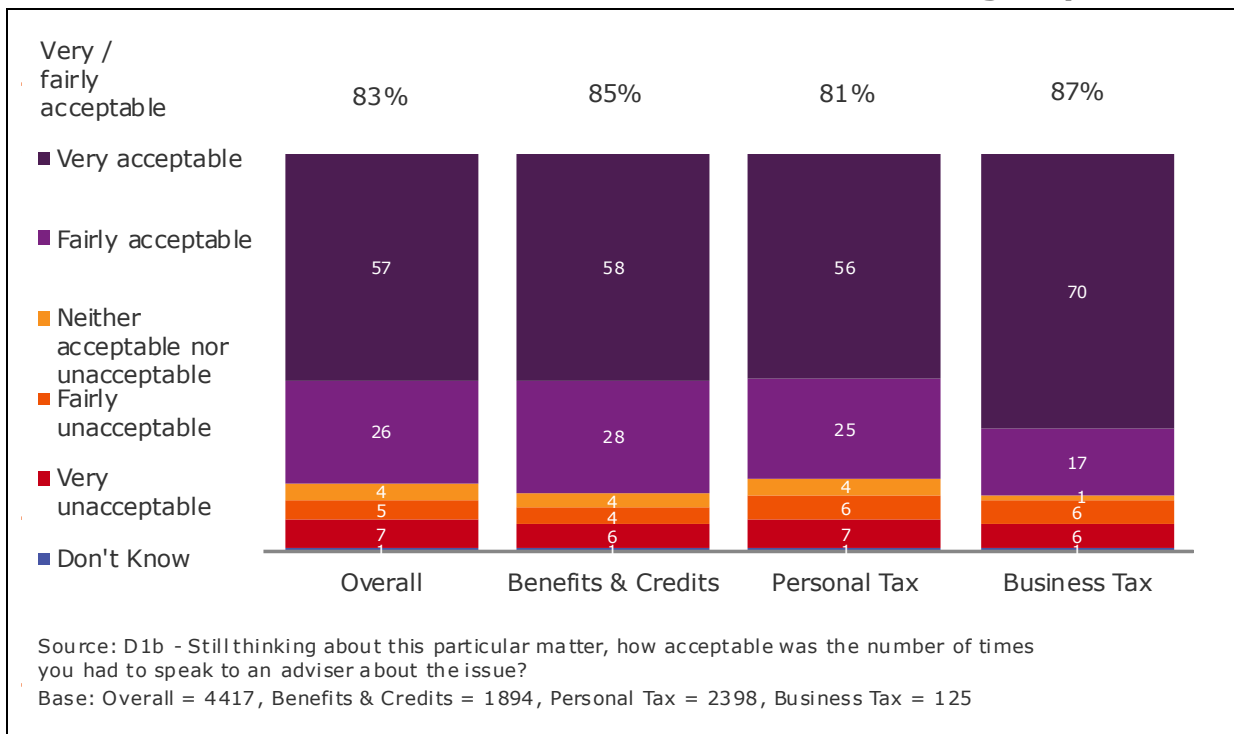
## **4.3 Acceptability of the number of times customers spoke to an adviser about the issue**

### **4.3.1 Total results**

Respondents were required to rate how acceptable they felt the number of times they had to speak to an adviser about the issue was. Responses revealed a positive attitude to this area of the helpline, with 83% of respondents rating this either very or fairly acceptable. Trend data is not available for this question, as this question was added to the survey in October 2011.



**Chart 24 Acceptability of number of times had to speak to an adviser – overall and across the three main business groups**



### 4.3.2 Sub-group analysis

The Benefits and Credits helplines scored significantly higher than Personal Tax (85% acceptability compared with 81%). This is despite the fact that there was no difference between these two business groups in terms of the number of times customers reported speaking to an adviser about the issue. This may be related to why customers had to make contact more than once. For instance, Benefits and Credits customers were more likely than Personal Tax customers to have said they needed to make multiple calls due to the complex nature of their query (37% compared with 33%). In contrast to this, Personal Tax customers were more likely than Benefits and Credits customers to have needed to make multiple calls as a result of the problem not being resolved (9% and 4%).

Some differences were also observed across each of the seven main helplines. National Insurance and Child Benefit customers were more likely to have rated the number of times they spoke with an adviser as acceptable, than Taxes and OSH customers.

Once more, NI was found to outperform the other Personal Tax lines of business.

**Table 25 Acceptability of number of times had to speak to an adviser – seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% very / fairly acceptable</b>
NI	290	90%
Child Benefit	227	88%
VAT & VAT Online	115	86%
Tax Credits	1650	85%
Employers	101	84%
Taxes	1754	80%
OSH	147	78%

### **4.3.3 What is an acceptable number of times to speak to an adviser?**

Nearly all (94%) customers who spoke to an adviser only once found this to be acceptable. In contrast to this, 69% of those that had spoken to an adviser two or three times found this acceptable and only 29% of those that made four or more calls found this acceptable.

For customers who spoke to an adviser more than once, acceptability levels were found to vary depending on the reason they gave for needing to make contact more than once. For instance, callers who said they needed to make multiple calls due to a mistake by HMRC were the least likely to say the number of calls they had to make was acceptable.

**Table 26 Acceptability by reason for speaking to an adviser more than once**

<b>Reason for needing to talk to an adviser more than once</b>	<b>Base</b>	<b>% very/fairly acceptable number of times spoken to an adviser about the issue</b>
Caller did not have all the information needed when they last called	214	81%
Complicated issue	513	60%
Caller had not heard back/received a reply from HMRC	241	58%
HMRC made a mistake	319	28%

Source: D1b

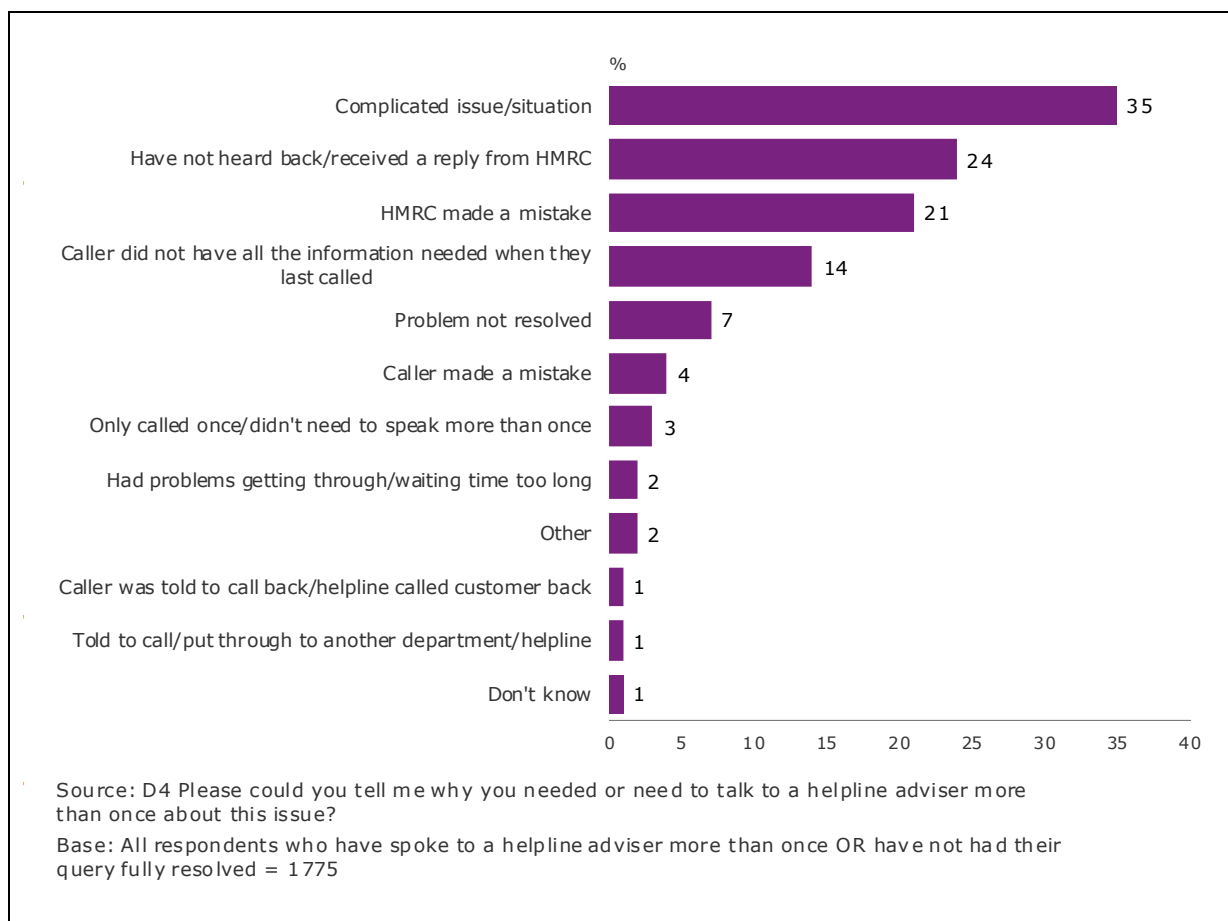
## 4.4 Reasons for needing to talk to the helpline adviser more than once about the issue

### 4.4.1 Total and trend results

All respondents who had spoken to a helpline adviser more than once about their issue or who said their query was not fully resolved, were asked a question about why they needed to speak to an adviser more than once about the issue.

A complicated issue/situation was the most common response, given by 35% of respondents. This was followed by having not received a call back from HMRC (24%), HMRC making a mistake (21%) and the caller not having the information needed when they first called (14%) as the other most common answers.

**Chart 27 Reasons for speaking to an adviser more than once about the issue – overall results**



The results were also compared with those from last year and there were no significant differences.

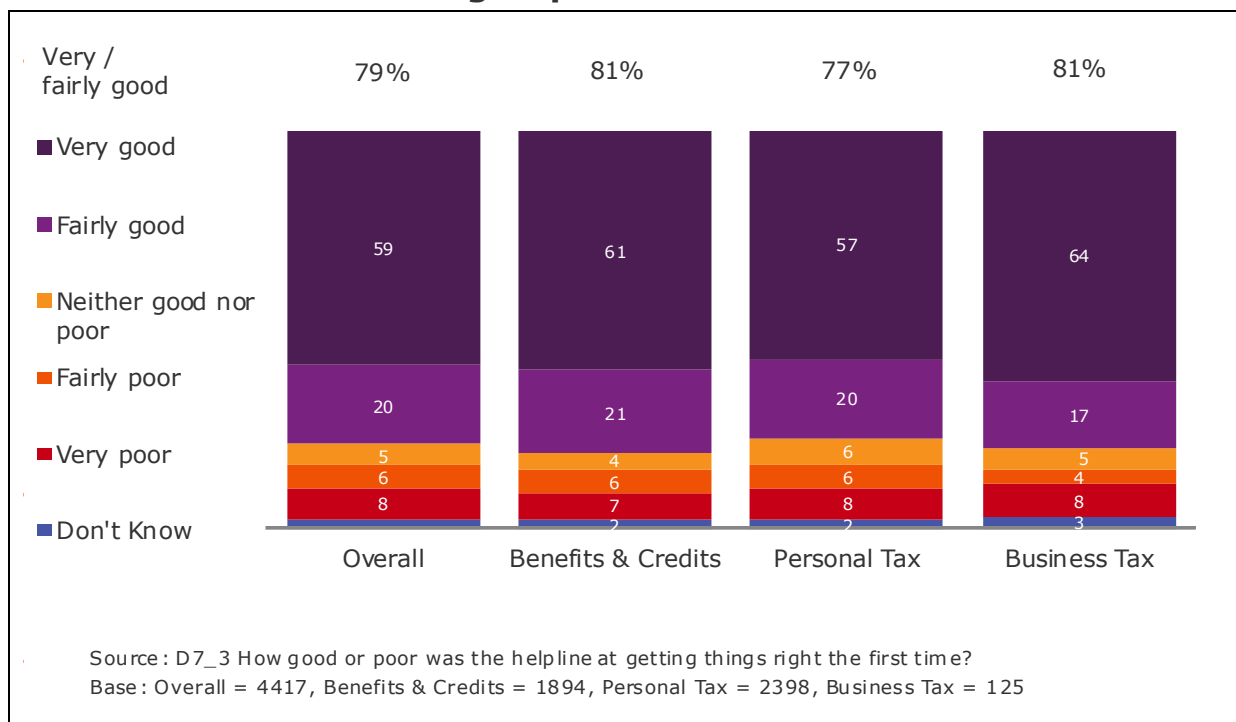
## 4.5 Rating of helplines getting things right the first time

### 4.5.1 Total and trend results

Customers were asked to rate how good or poor they felt the helpline was at getting things right the first time, using a five point scale, ranging from very good to very poor. Responses were mostly positive, with 79% of all respondents answering either very good or fairly good to this question.

Responses had not changed significantly over time; between April 2011 and March 2012 78% of customers thought the helpline was very or fairly good at getting things right the first time.

**Chart 28 Getting things right the first time – overall and across the three main business groups**



### 4.5.2 Sub-group analysis

81% of customers found the Benefits and Credits helplines good at getting things right the first time. This was significantly greater than the 77% reported for the Personal Tax helplines. Results for each business group had not changed significantly over time.

Looking at results by line of business, NI customers were more likely than OSH, Taxes and Employers helpline customers to report that the helpline was good at getting things right the first time. NI was found to outperform most of the other Personal Tax helplines.

**Table 29 Getting things right the first time – seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% very / fairly good</b>
NI	290	87%
Child Benefit	227	87%
Tax Credits	1650	81%
VAT & VAT Online	115	80%
OSH	147	78%
Taxes	1754	75%
Employers	101	74%

### 4.5.3 Factors contributing to how good or poor the helpline was at getting things right the first time

A number of factors were found to correlate with ratings for getting things right the first time. Customers who found it easy to understand what to do next, easy to understand the information provided by the adviser, felt that the adviser had the right level of expertise or felt the adviser understood the query were more likely to be of the opinion that the helpline was good at getting things right the first time.

**Table 30 Groups that were more likely to feel the helpline was good at getting things right the first time**

	<b>Base</b>	<b>% very/fairly good at getting things right the first time</b>
Overall sample	4,417	79%
Very/fairly easy to understand information provided by the adviser	3,953	85%
Very/fairly easy to understand what to do next to resolve the query	3,770	86%
Strongly agree/agree the adviser had the right level of expertise	3,853	87%
Strongly agree/agree that adviser understood the query	4,036	85%

Source: D7\_3

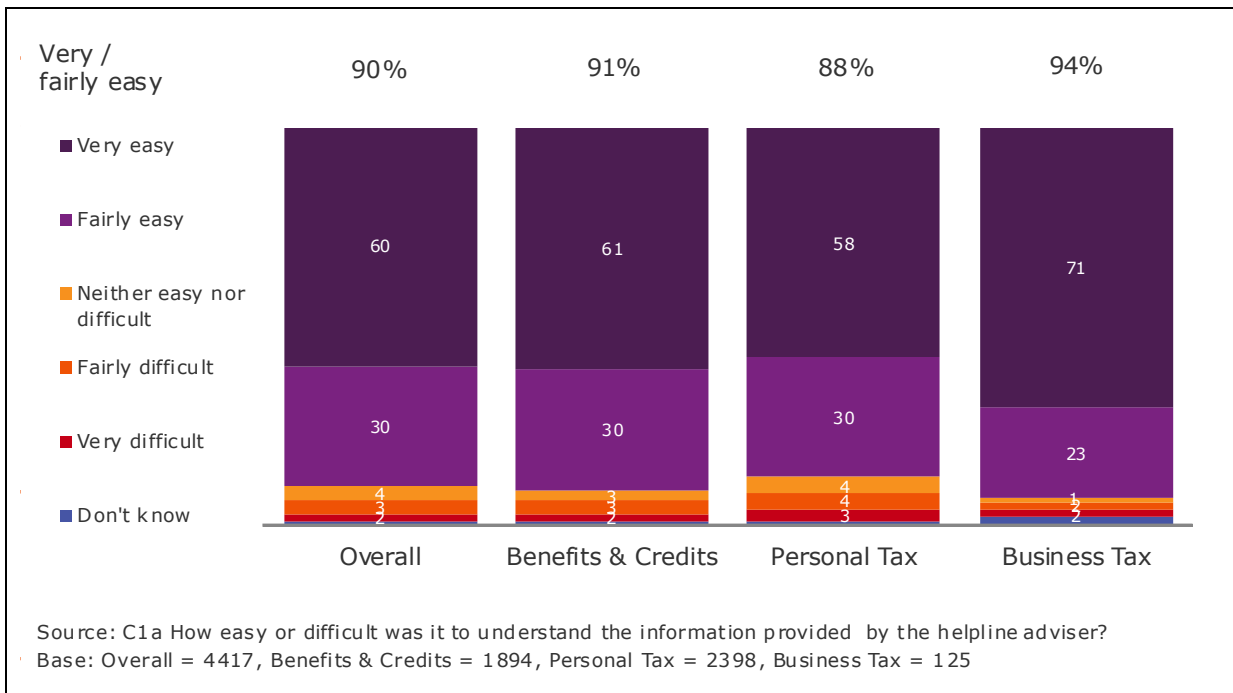
# 5. Helpline advisers

## 5.1 Understanding the information provided by the helpline adviser

### 5.1.1 Total and trend results

Respondents were asked to rate how easy or difficult they found it to understand the information provided by the helpline advisers, using a five point scale ranging from very easy to very difficult. Overall, 90% of customers rated this as very or fairly easy. There was no significant change in the ease of understanding information over time; 88% of customers surveyed between April 2011 and March 2012 rated this as very or fairly easy.

**Chart 31 Ease of understanding information provided by the helpline adviser – overall and across the three main business groups**



### 5.1.2 Sub-group analysis

Customers calling Business Tax helplines were more likely than those contacting Personal Tax lines to have found the information provided very or fairly easy to understand (94% and 88%). Results for each business group had not changed significantly compared with April 2011 to March 2012.

Customers calling the NI helpline were most likely to have said the information provided was easy to understand; results were significantly higher than for the Tax Credits, Taxes and OSH lines. Again, this demonstrates that the NI helpline performed better than the other Personal Tax lines.

**Table 32 Ease of understanding information provided by the helpline adviser – seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% very / fairly easy</b>
NI	290	96%
VAT & VAT Online	115	94%
Child Benefit	227	94%
Employers	101	92%
Tax Credits	1650	90%
Taxes	1754	87%
OSH	147	85%

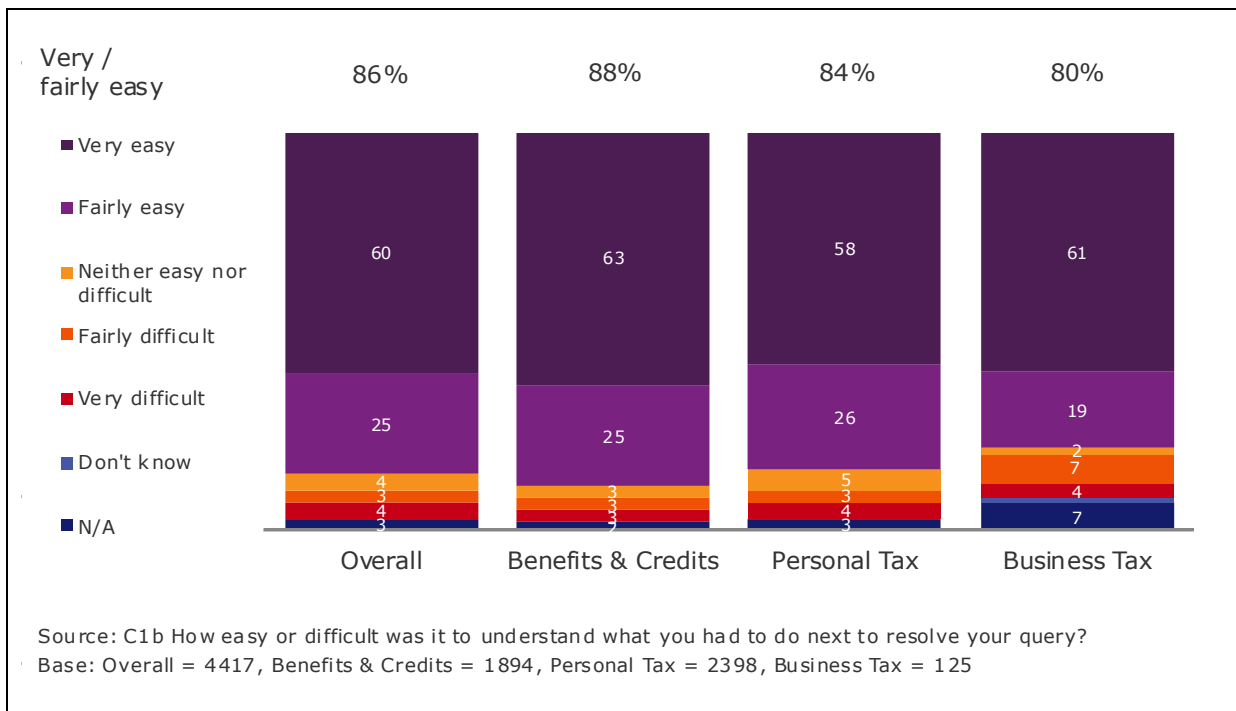


## 5.2 Understanding what to do next to resolve their query

### 5.2.1 Total and trend results

Respondents were asked how easy or difficult it was to understand what they had to do next to resolve their query. Once again, responses to this question were overwhelmingly positive, with 86% of respondents answering very or fairly easy and 7% claiming this was very or fairly difficult. Responses stayed consistent with those from April 2011 to May 2012 (86% very or fairly easy) with no significant differences.

**Chart 33 Ease of understanding what to do next to resolve the query – overall and across the three main business groups**



### 5.2.2 Sub-group analysis

Results were analysed to see how responses differed between the three business groups. The Benefit and Credit helplines had the greatest proportion of customers answering very or fairly easy (88%), significantly higher than Personal Tax (84%). The scores for the three business groups were not significantly different from those for the period April 2011 to March 2012.

NI was the highest performing helpline at this question, respondents were more likely to say it was easy to understand what to do next when contacting this helpline than for Taxes , OSH and VAT & VAT Online . The Child Benefit and Tax Credits also scored significantly higher than VAT & VAT Online.

This is a weak point for the VAT & VAT Online helpline. On the other measures the results tended to be in line with the other lines of business and generally towards the upper end. This is an area which should be targeted for improvement.

**Table 34 Ease of understanding what to do next to resolve the query – seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>% very / fairly easy</b>
NI	290	92%
Child Benefit	227	88%
Tax Credits	1650	88%
Employers	101	84%
Taxes	1754	83%
OSH	147	83%
VAT & VAT Online	115	78%

The percentage of customers rating each helpline as very or fairly easy was had not changed significantly compared with April 2011 to March 2012.

### **5.2.3 Factors contributing to how easy or difficult it was to understand what to do next to resolve the query**

Three factors were identified as potentially contributing to the ease in understanding what to do next. Customers who felt the adviser they spoke to had the right level of expertise and understood their query were more likely to understand what to do next. Also customers that found it easy to understand the information provided by the adviser were also more likely to understand what they had to do next.

**Table 35 Groups that were more likely to find it easy to understand what to do next to resolve their query**

	<b>Base</b>	<b>% very/fairly easy to get in touch with the helpline</b>
Overall sample	4,417	86%
Very/fairly easy to understand the information provided by the adviser	3,953	92%
Strongly agree/agree the adviser had the right level of expertise	3,853	91%
Strongly agree/agree that the adviser understood the query	4,036	90%

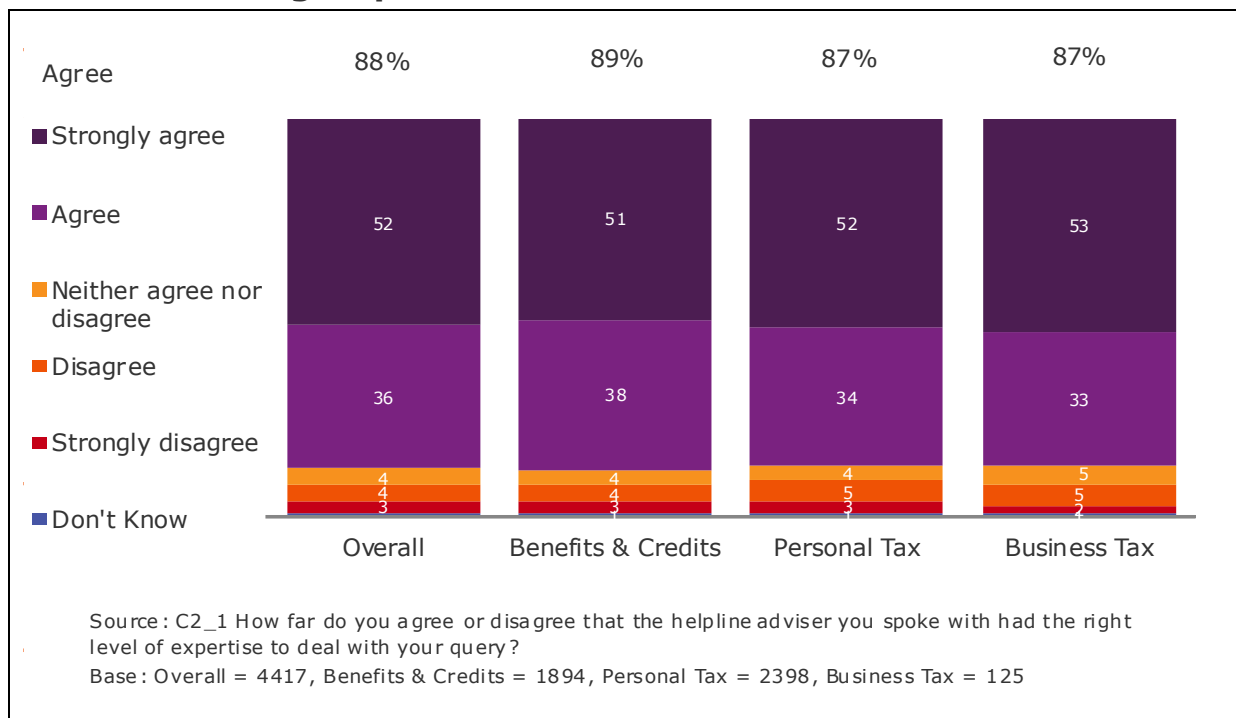
Source: C1b

## 5.3 Whether the helpline adviser had the right level of expertise to deal with the query

### 5.3.1 Total and trend results

Respondents were asked how far they agreed or disagreed that the helpline adviser they spoke to had the right level of expertise to deal with their query. Responses were given using a five point scale with answers ranging from strongly agree to strongly disagree. Results were generally positive, with 88% of respondents agreeing with the statement. The results were not significantly different from those from April 2011 to March 2012 (87% agreed).

**Chart 36 Agreement that the helpline adviser had the right level of expertise to deal with the query – overall and across the three main business groups**



### 5.3.2 Sub-group analysis

The overall picture was largely consistent, with responses similar for the three business groups. Results were not found to have changed over time.

Customers of the NI helpline were more likely to agree that that adviser had the right level of expertise than customers of the Tax Credits and Taxes helplines.

**Table 37 Agreement that the helpline adviser had the right level of expertise to deal with the query – seven main lines of business**

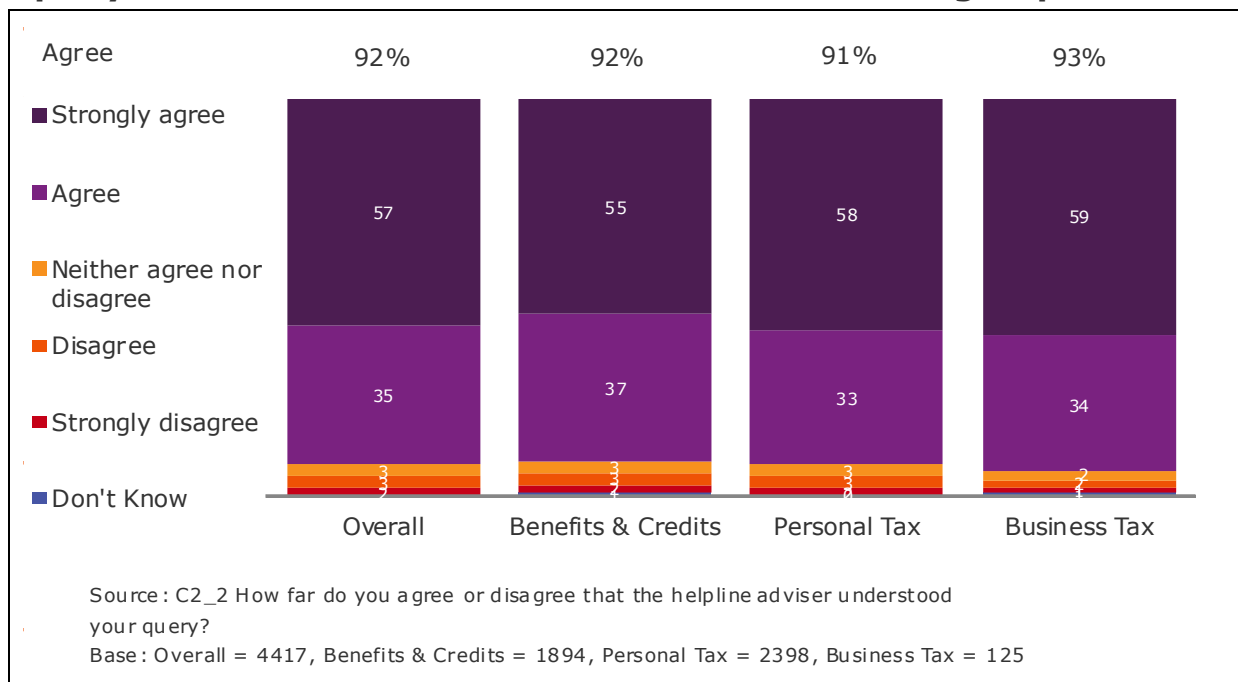
Helpline	Base	% agree
NI	290	93%
Child Benefit	227	93%
Tax Credits	1650	88%
Employers	101	87%
OSH	147	86%
VAT & VAT Online	115	85%
Taxes	1754	85%

## 5.4 Whether the helpline adviser understood the query

### 5.4.1 Total and trend results

Respondents were asked how far they agreed or disagreed that the helpline adviser they spoke to understood their query. Responses were given using a five point scale with answers ranging from strongly agree to strongly disagree. Overall 92% of respondents agreed with this statement. Results did not change over the survey period; 91% agreed or strongly agreed between April 2011 and March 2012.

**Chart 38 Agreement that the helpline adviser understood the query – overall and across the three main business groups**



### 5.4.2 Sub-group analysis

There were no significant differences between the different business groups in the proportion of customers who agreed or strongly agreed with this statement. The results for the three business groups were not found to have changed over time.

Customers of the NI helpline were most likely to agree that the adviser understood their query; this result was significantly higher than for Taxes and Tax Credits customers.

**Table 39 Agreement that the helpline adviser understood the query – seven main lines of business**

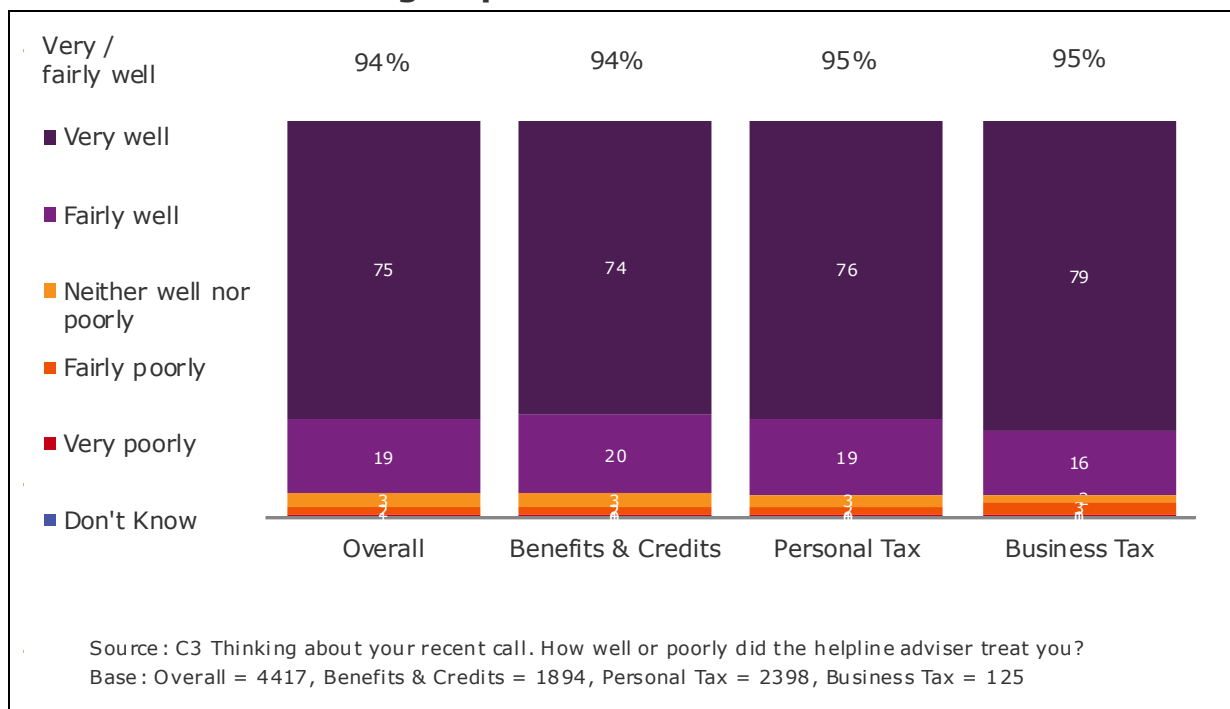
<b>Helpline</b>	<b>Base</b>	<b>% agree</b>
NI	290	97%
Child Benefit	227	95%
VAT & VAT Online	115	93%
OSH	147	92%
Tax Credits	1650	92%
Employers	101	91%
Taxes	1754	90%

## 5.5 Rating of treatment by the helpline adviser

### 5.5.1 Total and trend results

Customers were asked to rate how well or poorly the helpline adviser treated them, using a five point scale ranging from very well to very poorly. Treatment of customers by helpline advisers was the most positively answered question in the survey, with 94% of respondents answering either very well or fairly well to this question and 3% claiming they were treated very or fairly poorly. No change was observed over time; 94% of those surveyed between April 2011 and March 2012 thought the adviser had treated them very or fairly well.

**Chart 40 Treatment by helpline adviser—overall and across the three main business groups**



### 5.5.2 Sub-group analysis

There were no significant differences observed between the three main business groups, and results were not found to have changed over time. The score for the NI helpline was found to be significantly higher than those for the Taxes and Tax Credits helplines.

**Table 41 Treatment by helpline adviser—seven main lines of business**

Helpline	Base	% very / fairly well
NI	290	97%
Employers	101	96%
Child Benefit	227	95%
OSH	147	95%
VAT & VAT Online	115	94%
Tax Credits	1650	94%
Taxes	1754	94%

## 5.6 Why respondents felt they were treated very well or very poorly

### 5.6.1 Total results

Respondents who felt that they were treated either very well or very poorly were asked an open question regarding why they felt they had been treated this way.

The answers most commonly given by those that said they had been treated very well were that the adviser was helpful (31%), polite/courteous (30%) and quick (18%).

Only a small number of respondents said that they had been treated very badly, so caution needs to be exercised when looking at these results. Most of the answers given referred to staff not being able to help answer the query (62%) and being rude or unpleasant (26%).

**Table 42 Why respondents felt they were treated very well or very poorly by the helpline adviser (top answers) – overall results**

Why customers felt they were treated very well (3,321)	%	Why customers felt they were treated very poorly (50)	%
They were helpful	31%	Staff could not help me/answer my query	62%
They were polite/courteous	30%	Rude/unpleasant	26%
They were quick	18%	Poor service	25%
Sorted the problem/ query	17%	Took too long to get through to them/had to wait too long	9%
Answered the question	16%		
They understood customer's needs/ what they wanted	14%		
Explained / went through things with the customer	14%		
They were nice/ a nice person/ nice manner	14%		
Knowledgeable/ clever/ knew what they were doing	12%		



# 6. Improvements

## 6.1 How the service received could be improved

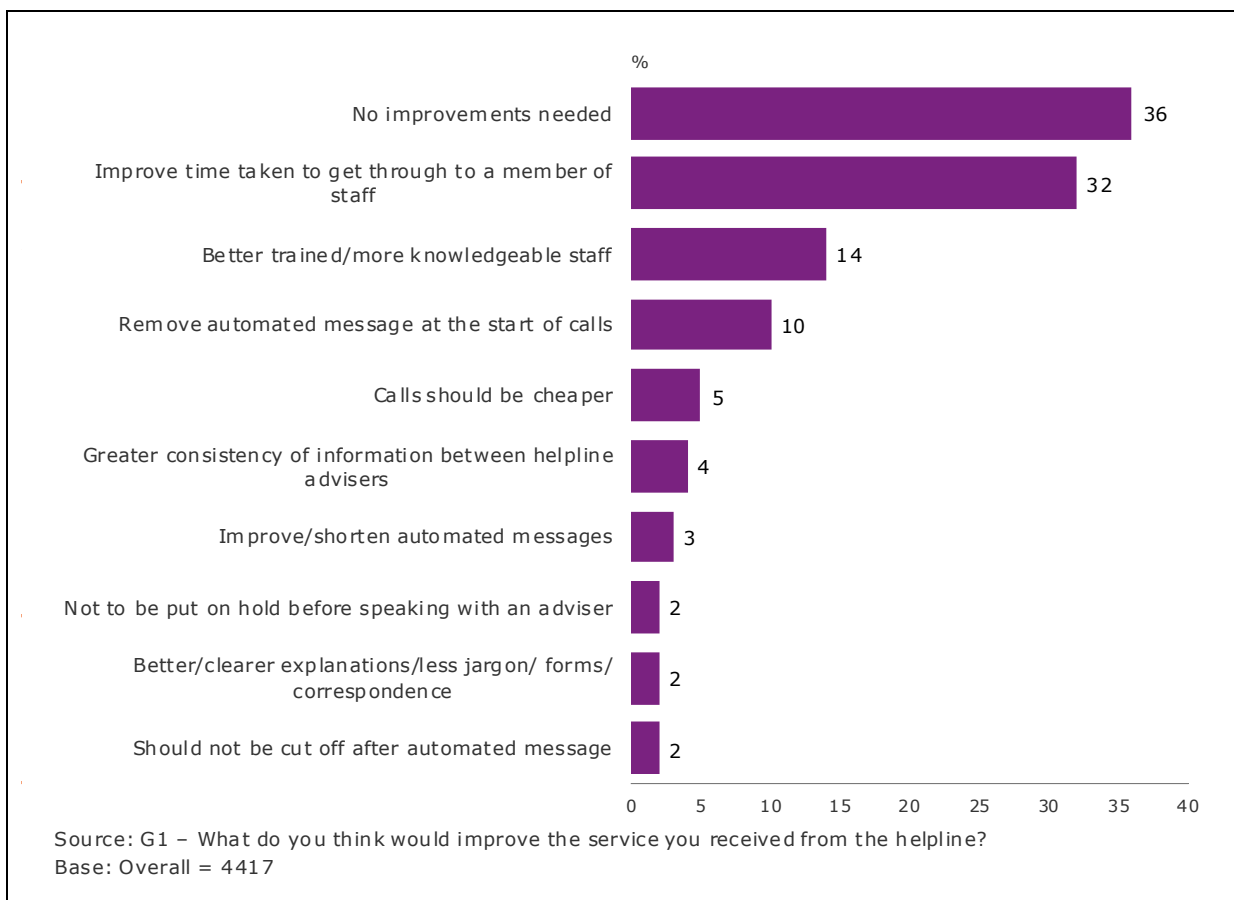
### 6.1.1 Total results

Respondents were asked to state, in their own words, what they felt would improve the helpline service. Interviewers categorised responses into a multicode list.

Chart 43 shows the top ten responses to this question. The most common answer was that no improvements were needed, with around a third of customers (36%) answering this.

The top two improvements suggested were reducing the time taken to get through to a member of staff (32%) and having better trained/more knowledgeable staff (14%).

**Chart 43 Improvements to the helpline service (top ten answers) – overall results**



These results reinforce the key areas for improvement which came out of the Key Driver Analysis. Ease of getting in touch was an area highlighted as needing improvement in the KDA, and one of the top improvements given at this question, was to improve the time taken to get through to a member of staff.

Similarly, getting things right the first time was an area which the KDA suggested should be focused on for improvements and this is very likely to be related to the levels of training and knowledge of staff which was the improvement 14% of respondents spontaneously said they wanted to see.

It is important to note that we would not necessarily expect the Key Driver Analysis results and the results to this question to be the same. Firstly, this question captured respondents' top of mind responses whereas the KDA looked for the underlying factors behind the overall experience rating. Secondly, the KDA looked at what issues drove the overall experience rating, and it is possible that respondents that rated their overall experience as good or very good may still think that further improvements could be made to the service. These improvements would not necessarily be captured in the KDA but would be shown at this question where we asked all respondents for their suggestions.

### **6.1.2 Sub-group analysis**

Looking at the results by the three business groups, callers to the Business Tax helplines were most likely to think no improvements were needed (48%) compared with Benefits and Credits (36%) and Personal Tax (35%) helpline customers. Furthermore, the need to improve the time taken to get through to a member of staff was significantly greater amongst Personal Tax (31%) and Benefits and Credits customers (35%) than their Business Tax counterparts (16%).

Looking at the results by line of business (Table 44) it can be seen that NI customers were most likely to be of the belief that no improvements were necessary (significantly more so than for Employers, Tax Credits, OSH and Taxes). In contrast to this, Tax Credits and Taxes customers were more likely than OSH, VAT & VAT Online, Child Benefit and NI to think that the time taken to get through needed to be improved. Taxes customers were also more likely than Child Benefit, Employers and NI

customers to think that staff needed to be better trained or more knowledgeable.

**Table 44 Treatment by helpline adviser—seven main lines of business**

<b>Helpline</b>	<b>Base</b>	<b>No improvement needed</b>	<b>Improve time taken to get through</b>	<b>Better trained/ more knowledgeable staff</b>
NI	290	54%	20%	7%
Child Benefit	227	46%	27%	10%
VAT & VAT Online	115	45%	18%	15%
Employers	101	35%	34%	10%
Tax Credits	1650	35%	36%	14%
OSH	147	32%	25%	17%
Taxes	1754	31%	34%	16%

## 7. Conclusions

Overall the results from the survey were positive and the overall ratings of the customer experience remained the same as those from April 2011 to March 2012.

The results demonstrated that the contact centre advisers are highly regarded by customers. The vast majority of customers thought that the advisers were knowledgeable, had treated them well, understood queries and were good at passing on information.

As with last year's report, the results from the survey and the Key Driver Analysis indicated that the main area which could be improved is the ease of getting in touch. This was also confirmed by the fact that the most common improvement suggested was to reduce the time taken to get through to an adviser. In the last report it was found that median waiting times had increased and this was highlighted as an area of concern. It is therefore a positive result that the length of time customers had to wait to get through to an adviser was not found to have increased over the last year.

Getting things right the first time was also found by the Key Driver Analysis to be a relative weakness and an area which should be focused on for improvement. Whilst most customers found the number of times they had to speak with an adviser acceptable, those who had to make multiple calls because of a mistake by HMRC generally thought that this was unacceptable. This suggests that focusing on reducing the number of mistakes made should improve overall satisfaction levels.

Whilst most of the results are fairly similar when analysed by business group or line of business, there is significant variation in some cases. Lessons from more successful areas should be applied where possible.

For instance, focusing on the Personal Tax business group, throughout the survey NI customers were much more positive than those from other Personal Tax helplines. If there are positive aspects or lessons from the NI helpline which can be applied to the other helplines this should increase overall satisfaction.

The VAT & VAT Online helpline was generally found to perform well in comparison with the other lines of business, however, there was one area where it scored more negatively: how easy customers found it to understand what had to do next to resolve their issue. Although this may partly be because these queries tend to be more complicated than those in other areas, the advice given by advisers should be made as actionable and easy to understand as possible.

# Appendix 1 – Demographic analysis

Additional analysis has been carried out to determine how experiences and opinions vary for customers with different demographic characteristics. Demographics were collected at the end of the survey for respondents that contacted a helpline regarding an issue that was to do with themselves. The demographics of those that contacted a helpline on behalf of a business or on behalf of some other person or body were not collected and as such these respondents are not included in this analysis.

The business group contacted by customers was found to vary by demographic group. For instance, men were more likely to have contacted Personal Tax lines (69% of men surveyed) and women were more likely to have contacted a Benefits and Credits helpline (62% of women surveyed). Younger customers (those aged under 50) were found to be more likely to have contacted Benefits and Credits, whilst older people were more likely to have got in touch with a Personal Tax helpline. This is also shown in the working status, with those retired much more likely than others to have contacted Personal Tax and much less likely to have contacted Benefits and Credits. The full results can be found in Table 45.

It is important to note that some of the differences observed and discussed in this section may be attributed to the helplines that customers contacted rather than to the characteristics of the customer.

**Table 45 Line of business group contacted by demographics**

<b>Helpline</b>	<b>Base</b>	<b>Benefits &amp; Credits</b>	<b>Personal Tax</b>	<b>Business Tax</b>
<b>Sex</b>				
Male	1,798	27%	69%	4%
Female	2,476	62%	37%	1%
<b>Ethnicity</b>				
White	3,668	46%	51%	2%
BME <sup>2</sup>	546	59%	40%	1%
<b>Age</b>				
29 or under	757	58%	41%	1%
30-49	2,063	60%	38%	2%
50-64	1,042	29%	68%	3%
65+	390	6%	88%	6%
<b>Working status</b>				
Employed	2,336	50%	48%	2%
Retired	487	7%	89%	4%
Not working	881	73%	27%	%
Self employed	570	28%	66%	6%

## Overall customer experience

Women were more likely than men to report that their overall experience was good or very good (83% compared with 79%). This may be caused by the fact that women were more likely than men to have contacted Benefits and Credits helplines and this business group had higher scores than the Personal Tax helplines.

Retired customers were less positive about their overall experience than those not working (79% and 84% respectively). The retired were also more likely than the employed and those not currently working to have said their experience was worse than expected (14% compared with 10% and 9%).

---

<sup>2</sup> Black and Minority Ethnic

## **Ease of getting in touch**

Women were more likely than men to have said it was very or fairly easy to get in touch (70% and 66% respectively). This was found to be the case despite the fact that there was no difference in the number of times men and women had to call to get through and no difference in terms of how long they had to wait to get through.

Retired customers were less likely than those not working to have rated it very or fairly easy to get in touch (65% and 71% respectively). This is despite the fact that the retired were more likely than those employed and those not working to have got through with just one telephone call (76% compared with 70% and 71%).

Customers aged under 29 were more likely than those aged 30-49, 60-64 or 65+ to report having to wait less than three minutes to get through to an adviser (33% compared with 39%, 44% and 41% respectively). Despite this there was no difference by age in terms of overall how easy customers found it to get through.

## **First contact resolution**

Customers from Black and Minority Ethnic groups were found to have been more likely than White customers to report that the helpline they contacted has been very or fairly good at getting things right the first time (83% and 79%).

The self-employed were more likely than the retired and those employed to have said that the helpline they contacted was very or fairly good at getting things right the first time (84%, 77% and 79% respectively).

When looking at how acceptable the number of times customers had to speak to an adviser there were no demographic differences.

## **Advisers**

The main differences observed were by age. More elderly customers (those aged 65+ and those retired) were less likely than others to have found the information provided by advisers easy to understand and less likely to have found it easy to understand what to do next to resolve their query. The results are shown in Table 46.



**Table 46 Ease of understanding by age and working status**

<b>Helpline</b>	<b>Base</b>	<b>Very / fairly easy to understand the information provided</b>	<b>Very / fairly easy to understand what to do next to resolve query</b>
<b>Age</b>			
29 or under	757	91%	90%
30-49	2,063	90%	86%
50-64	1,042	89%	85%
65+	390	86%	78%
<b>Working status</b>			
Employed	2,336	89%	86%
Retired	487	87%	79%
Not working	881	92%	88%
Self employed	570	91%	85%

There were no differences by age in terms of how well respondents felt the adviser treated them overall, agreement that the helpline adviser understood their query and agreement that the helpline adviser had the right level of expertise.

A couple of small but significant differences were also observed between men and women. Women were more likely to have found it very or fairly easy to understand what they had to do next to resolve their query (87% and 84%). Women were also more likely than men to agree that the adviser had the right level of experience (89% and 86%).

### **Improvements**

Older customers (those retired and those aged 50+) were more likely than others to have said that they would like the automated messages to be removed. Fourteen percent of those retired and 13% of those aged 50+ made this suggestion.

Women were more likely than men to suggest that the time it took to get through to a member of staff should be improved (34% and 31% respectively).

# Appendix 2 – Questionnaire

## PART 1 ANSWERING THE CALL

If you have called the helpline more than once recently, please answer in relation to the call you made when you were asked to take part in this survey. This was when you called the **<INSERT HELPLINE NAME>** helpline on **<INSERT DATE>**.

**B1 Which of the following best describes the reason you called the helpline?**

**MULTI CODE, RANDOMISE LIST**

- To ask a question
- To find out where to find information
- Regarding a specific/ongoing issue
- To make a transaction
- To query a bill
- To make a complaint
- To correct an error
- To notify Revenue and Customs of a change in personal circumstances/details
- To ask for a form
- To make an application
- Other (specify)

**ASK ALL**

**B3 How many times did you have to call the **<INSERT HELPLINE NAME>** helpline before your call was answered?**

**SINGLE CODE**

DO NOT PROMPT, ONLY READ OUT CODES IF RESPONDENT IS HAVING DIFFICULTY ANSWERING

- Once
- Two or three times
- Four or five times
- Six to nine times
- Ten to nineteen times
- Twenty times or more
- DK

**ASK ALL**

**B5 When you first spoke with a helpline adviser, how long were you waiting before you were able to talk to them?**

INTERVIEWER, CLARIFY IF NECESSARY:

THIS IS THE PERIOD OF TIME YOU LISTENED TO AUTOMATED MESSAGES OR MUSIC, BEFORE YOU SPOKE DIRECTLY WITH A HELPLINE ADVISER FOR THE FIRST TIME

DO NOT PROMPT, ONLY READ OUT CODES IF RESPONDENT IS HAVING DIFFICULTY ANSWERING

**SINGLE CODE**

I was put straight through

Less than one minute

Two to three minutes

Four to five minutes

Five to nine minutes

Ten to nineteen minutes

Twenty minutes or more

DK

**ASK ALL**

**B7 How easy or difficult would you say it was overall to get in touch with the helpline?**

**SINGLE CODE**

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

DK

**PART 2 SATISFACTION WITH THE CALL & HELPLINE STAFF**

I am now going to ask you some questions about the call itself.

Please answer in relation to the call you made to the **<INSERT HELPLINE NAME>** helpline when you were asked to take part in this survey.

**C1 How easy or difficult was it to understand...**

**RANDOMISE**

...the information provided by the helpline adviser?

...what you had to do next to resolve your query?

**SINGLE CODE**

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

n/a (only show for second statement)

DK

**C2 How far do you agree or disagree that...**

**RANDOMISE**

...the helpline adviser you spoke with had the right level of expertise to deal with your query?

...the helpline adviser understood your query?

**SINGLE CODE**

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

DK

**C3 Thinking about your recent call. How well or poorly did the helpline adviser treat you?**

**SINGLE CODE**

Very well

Fairly well

Neither well nor poorly

Fairly poorly

Very poorly

DK

**IF ANSWERED "VERY WELL" OR "VERY POORLY" TO C3**

**C4 Why do you say that?**

**PROBE: Anything else?**

**OPEN**

DK

## PART 3 FIRST CONTACT RESOLUTION

**D1 Still, thinking about when you called the <INSERT HELPLINE NAME> helpline on <INSERT DATE>, was this the only time you talked to a helpline adviser about this particular matter or have you talked with them on more than one occasion?**

INTERVIEWER: IF MORE THAN ONE CONTACT, CHECK THE RESPONDENT IS DEFINITELY THINKING ABOUT THE SAME MATTER AND THEN PROBE FOR NUMBER OF TIMES RESPONDENT HAS SPOKEN TO A HELPLINE ADVISER ABOUT THIS PARTICULAR ISSUE

### **SINGLECODE**

Once

Two or three times

Four or five times

More than five times

Don't know

**D1b Still thinking about this particular matter, how acceptable was the number of times you had to speak to an adviser about the issue?**

### **SINGLE CODE**

Very acceptable

Fairly acceptable

Neither acceptable nor unacceptable

Fairly unacceptable

Very unacceptable

Don't know

**D2 Has your query now been fully resolved?**

**For example, have you received all of the help or information you were looking for?**

### **SINGLE CODE**

Yes

No

DK

**IF MORE THAN ONCE AT D1 OR "NO" AT D2 ASK D4**

**D4 Please could you tell me why you needed or need to talk to a helpline adviser more than once about this issue?**

DO NOT READ OUT, MULTICODE

Complicated issue/situation

HMRC made a mistake

Have not heard back/received a reply from HMRC

Caller made a mistake

Caller did not have all the information needed when they last called

Other (please specify)

DK

**ASK ALL**

**D7 How good or poor was the helpline at...**

**RANDOMISE**

**...getting things right the first time?**

**SINGLE CODE**

Very good

Fairly good

Neither good nor poor

Fairly poor

Very poor

DK

## **PART 4 OVERALL MEASURE**

**E1 Overall, how satisfied were you with the outcome of the call to the <INSERT HELPLINE NAME> helpline on <INSERT DATE>?**

**SINGLE CODE**

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

DK

**E2 Putting aside the outcome now, overall, how would you rate your recent experience of calling the <INSERT HELPLINE NAME> helpline?**

**Would you say this was..**

**SINGLE CODE**

Very good

Fairly good

Neither good nor poor

Fairly poor

Very poor

DK

## **PART 5 CUSTOMER EXPECTATIONS**

**F1 And would you say your recent experience of calling the Revenue and Customs helpline was better than you expected, worse or in line with your expectations?**

**SINGLE CODE**

Better

Worse

In line with expectations

DK



**PART 6 IMPROVING SATISFACTION**

**G1 What do you think would improve the service you received from the helpline? PROBE: What else?**

DO NOT READ OUT, MULTICODE

**MULTI CODE, RANDOMISE**

No improvements needed/good service received

Improve time taken to get through to a member of staff (more advisers)

Better trained/more knowledgeable staff

Not to be put on hold before speaking with an adviser

To be put on hold instead of hearing an engaged tone

Greater consistency of information between helpline advisers

Remove automated messages at the start of calls

Calls should be cheaper

Should not be cut-off after automated message

Other (specify)

DK

**PART 7 DEMOGRAPHICS & CLOSING QUESTIONS**

**ASK X1 – X5 TO “INDIVIDUALS” NOT TO “AGENTS” OR “BUSINESSES”**

Lastly, I would just like to ask you a few questions about yourself.

**X1 How old were you on your last birthday?**

**NUMERICAL OPEN (ALLOW RANGE 16 -99)**

Refused

**IF REFUSED AT H1 ASK H2**

**X2 In that case could you tell me which of these age bands you fall into?**

**SINGLE CODE**

19 or under

20-29

30-39

40-49

50-59

60-64

65-69

70-79

80 or over

Refused

**X3 Which of the following groups do you consider you belong to?**

**SINGLE CODE**

READ OUT CATEGORIES IN BOLD THEN PROBE WITH DETAILED CATEGORIES.

**White**

British

Irish

Any other white background (PLEASE WRITE IN)

**Mixed**

White and Black Caribbean

White and Black African

White and Asian

Any other mixed background (PLEASE WRITE IN)

**Asian or Asian British**

Indian

Pakistani

Bangladeshi

Any other Asian background (PLEASE WRITE IN)

**Black or Black British**

Caribbean

African

Any other Black background (PLEASE WRITE IN)

**Chinese**

Any other background (PLEASE WRITE IN)

Refused

**X4 Which of these best describes your employment at the moment?**

**SINGLE CODE**

Working in a paid job (30+ hours)

Working in a paid job (8-29 hours)

Working in a paid job (Less than 8 hours)

Self-employed

Not in paid employment/looking after house or home

Full time student at school

Full time student at university/polytechnic/college

Part time student

Unemployed

Retired from paid employment

Temporarily/permanently off sick

**X5 For classification purposes only I would now like to ask about annual household income.**

**Please can you tell what your annual household income is before tax? Please include earnings from employment or self-employment, income from benefits and pensions, and income from other sources such as interest from savings.**

**SINGLE CODE**

Up to £6,420

£6,421 to £9,999

£10,000 to £19,999

£20,000 to £29,999

£30,000 to £39,999

£40,000 to £50,000

Over £50,000

DK

R

**ASK X6 TO “BUSINESSES” NOT TO “AGENTS” OR “INDIVIDUALS”**

**Lastly, I would just like to ask you a question about your business/organisation.**

**X6 How many employees does your company have who pay tax under PAYE (including yourself)?**

**SINGLE CODE**

1-9

10-49

50-249

250-999

1,000+

DK

**Thank & close**

**X7 INTERVIEWER: PLEASE CODE GENDER OF RESPONDENT**

**SINGLE CODE**

Male

Female

# Appendix 3 - Sample profile

## Sample profile – Individuals

	Unweighted		Weighted
	Count	%	%
<b>Sex</b>			
Male	1798	42%	41%
Female	2476	58%	59%
<b>Ethnicity</b>			
White	3668	86%	86%
BME	546	13%	13%
<b>Age</b>			
19 or under	55	1%	1%
20-29	702	16%	16%
30-39	992	23%	24%
40-49	1071	25%	25%
50-59	741	17%	17%
60-64	301	7%	7%
65-69	246	6%	6%
70-79	119	3%	3%
80 or over	25	1%	1%
<b>Working status</b>			
Full time	1495	35%	34%
Part time	841	20%	20%
Self employed	570	13%	13%
Student	90	2%	2%
Retired	487	11%	11%
Not working	791	19%	20%

### Sample profile – Reason for calling helpline

	Unweighted		Weighted
	Count	%	%
To ask a question	2896	66%	65%
Regarding a specific/ongoing issue	1714	39%	39%
To notify Revenue and Customs of a change in personal circumstances/details	1704	39%	39%
To correct an error	930	21%	20%
To find out where to find information	919	21%	20%
To make an application	715	16%	17%
To query a bill	641	15%	14%
To ask for a form	504	11%	12%
To make a transaction	214	5%	5%
To make a complaint	163	4%	4%
To check details/ information	62	1%	2%