



HM Revenue
& Customs

HMRC Contact Centres Survey Report 2013-2014

**HM Revenue and Customs Research
Report 337**

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Executive summary

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

The survey started in October 2010 and covers all lines of business and contact centres. This report covers the results for April 2013 to March 2014; comparisons have been made to the results from April 2012 to March 2013 where possible.

Overall customer experience

Overall scores were very positive:

- 80% 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 (40%) and in line with expectations for half of customers (49%). Compared with the 2012 to 2013 results, the proportion that rated their experience as better than expected increased by one percentage point.

Key Driver Analysis (KDA) revealed that to improve the overall experience score further, getting things right the first time and ease of getting in touch 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 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 Personal Tax customers than for other customers. Acceptability of number of times they had to speak to an adviser was important for Benefits and Credits customers.

Ease of getting in touch

Most respondents only had to call once to get through to an adviser (69%) and the call waiting time was on average 4 minutes (median), although (35%) reported waiting less than 3 minutes and (35%) reported waiting more than 10 minutes.

Two-thirds (64%) 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 3 minutes).

First contact resolution

Just over two-thirds (69%) 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
- 91% agreed that the adviser had understood their query
- 89% said it was easy to understand the information provided by the adviser
- 87% agreed that the adviser had sufficient expertise to deal with their query
- 85% 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 2012-March 2013.

The National Insurance and Child Benefit helplines scored higher than any other helpline in all of these areas and was typically found to outperform other Personal Tax or Tax Credits lines.

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.

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1. Introduction

1.1 Background and survey aims

HMRC Contact Centres provide a national telephone service for dealing with enquiries from HMRC customers. This is delivered over 17 sites in the UK and covers 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

HMRC commissioned TNS-BMRB to conduct a customer experience survey of Contact Centres. 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 106,697 calls made to contact centres during the timeslots selected for sampling. Out of these calls 106,003 customers (99% capture rate) were asked to take part and 41,670 customers agreed to participate in the survey (39% participation rate). Of these, 9,408 were randomly selected for the survey. 16% of these customers could not be contacted because the number recorded for them was incorrect, so that the effective survey sample was 7,948.

In total, 4,420 interviews were conducted between March 2013 and April 2014 and the response rate, based on the effective sample, was 56%.

Table 1 : Survey outcomes

	Number	Percentage (total)	Percentage (effective total)
Total sample issued	9,408	100%	N/A
Bad sample / wrong number	1,460	16%	N/A
Total effective sample	7,948	84%	100%
Total interviews conducted	4,420	47%	56%
Refusals	983	10%	12%
No contacts	2,545	27%	32%

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 2013 to 2014 financial year and covers all lines of business and contact centres. Where possible, this report compares the 2013-2014 results with the 2012-2013 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
- Corporation Tax

Business Tax refers to:

- VAT and VAT Online
- Excise
- Stamps

Furthermore, results are reported separately for the six lines of business where sufficient interviews were achieved over the year for individual analysis; Tax Credits, Taxes, Child Benefit, Online Service Helpdesk (OSH), National Insurance and VAT & VAT Online¹.

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.

¹ In the report for April 2013 to March 2014, results were not broken down by Employers helpline as fewer than 100 interviews were conducted with customers of this line 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	%	%
Tax credits	1,795	41%	37%
Taxes	1,472	33%	38%
National Insurance (NI)	321	7%	6%
Child Benefit	307	7%	6%
Online Services Helpdesk (OSH)	125	3%	3%
VAT & VAT Online	115	3%	3%
Employers Helpline	88	2%	2%
Orderline	68	2%	2%
Construction Industry Scheme (CIS)	62	1%	2%
Corporation Tax	47	1%	1%
Stamps	13	0%	0%
Tax Credits Debt Management and Banking (TC DMB)	7	0%	0%

Table 3 : Sample profile – Site

	Unweighted		Weighted
	Count	%	%
Longbenton	693	16%	14%
Bathgate	601	14%	13%
Peterlee	436	10%	9%
Cardiff	348	8%	9%
Sunderland	314	7%	7%
St Austell	292	7%	6%
Liverpool	233	5%	5%
Glasgow	230	5%	5%
Bradford	218	5%	6%
Dundee	188	4%	4%
Manchester	185	4%	4%
East Kilbride	182	4%	5%
Lillyhall	170	4%	5%
Merry Hill	136	3%	3%
Newcastle	100	2%	3%
Portsmouth	64	1%	2%
Belfast	30	1%	1%

Table 4 : Sample profile – Type of caller

	Unweighted		Weighted
	Count	%	%
Individual	4225	96%	95%
Agent	77	2%	2%
Business	118	3%	3%

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.

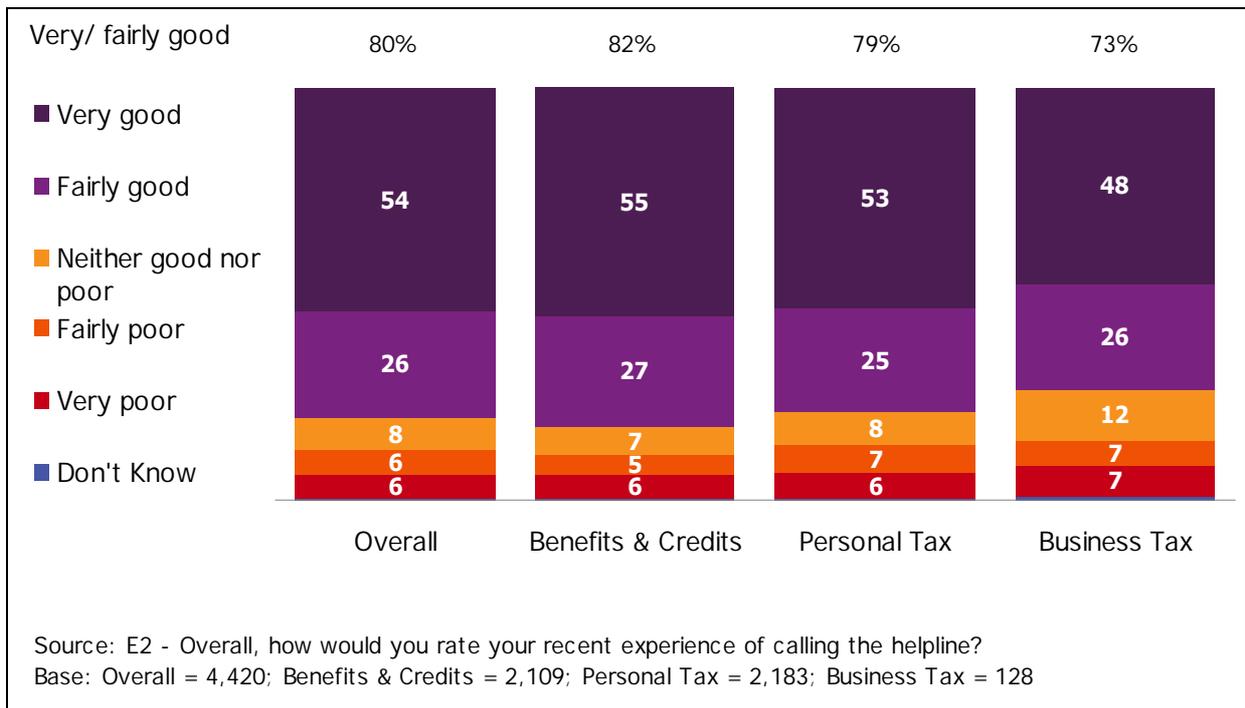
2. Customer experience

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, 80% of respondents gave an answer of either very good or fairly good to this question. Customer satisfaction has remained consistently high over time, with 81% of respondents interviewed between April 2012 – March 2013 rating their experience as either very or fairly good (not significantly different from April 2013 – March 2014).

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 Benefits & Credits helplines

had the most positive experience, with 82% rating their experience as very or fairly good, greater than those calling the Personal Tax (79%) and Business Tax helpline (73%). The scores for Personal Tax and Benefits and Credits were not found to have changed significantly compared with the 2012-2013 survey. However, customers calling the Business Tax helplines were found to be significantly less likely to rate their experience positively in 2013-14, 73% compared with 87% in 2012-2013.

Differences were also found across the seven main helplines. 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 VAT & VAT Online and OSH.

Table 6 Overall experience - across seven main lines of business

Helpline	Base	% very / fairly good recent experience of calling the helpline
NI	321	89%
Child Benefit	307	88%
Tax Credits	1795	82%
Taxes	1472	77%
OSH	125	73%
VAT & VAT Online	115	72%

There were no significant changes by line of business compared with April 2012 to March 2013, apart from VAT & VAT Online which has significantly decreased from 86% in 2012-13 to 72% in 2013-14.

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 also having a good experience calling the helpline, compared with overall figures of 80%. The number of times customers had to speak to an adviser about the issue also had a significant impact, with 90% 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

	Base	% very / fairly good recent experience of calling the helpline
Overall sample	4,420	80%
Very/fairly easy to get in touch with the helpline	2,856	93%
Very/fairly acceptable the number of times had to speak to an adviser	3,657	90%
Very/fairly good at getting things right the first time	3,447	92%
Very/fairly easy to understand what to do next	3,778	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 0.64, this means that 64% of the variance is explained by the model, this is a very good result for cross-sectional survey data.

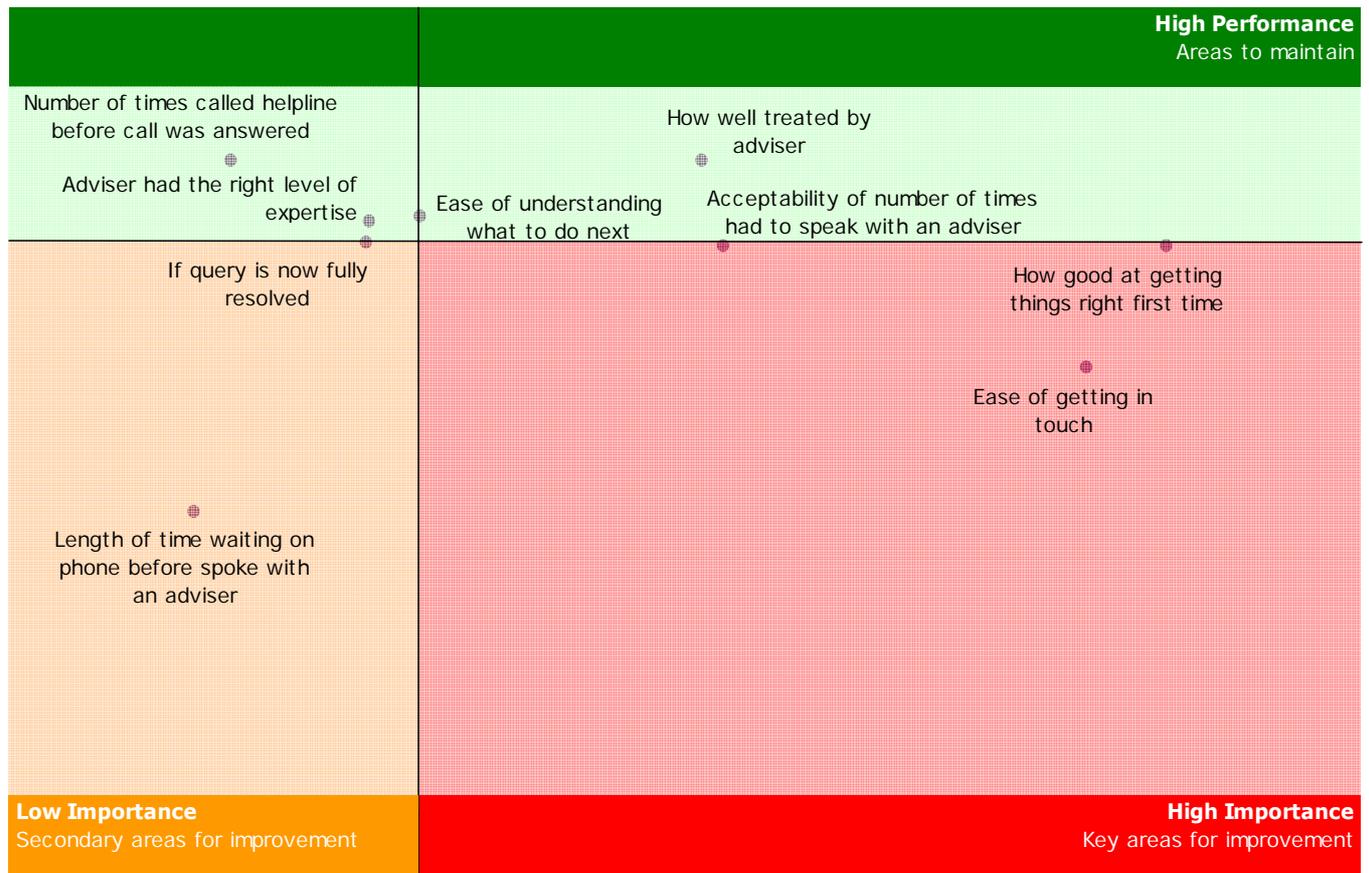
2.2.2 Findings

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

Customer Experience	β
How good at getting things right first time	0.253
Ease of getting in touch	0.237
Acceptability of number of times had to speak with an adviser	0.157
How well treated by adviser	0.147
If query is now fully resolved	0.079
Ease of understanding what to do next	0.078
Adviser had the right level of expertise	0.068
Number of times called helpline before call was answered	0.049
Length of time waiting on phone before spoke with an adviser	0.041
Ease of understanding information provided by adviser	0.024
Agreement that adviser understood the query	0.024

Chart 9 Key Driver Analysis Quadrant



R²=0.64

The Key Driver Analysis results remain similar to those in the 2012 to 2013 report. Getting things right the first time and ease of getting in touch 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 Business Tax and Personal Tax helplines than for Benefits and Credits. How good HMRC are at getting things right first time was important for Personal Tax customers. It was more important for Business Tax customers that they were well treated by the adviser than for customers of the other two business groups. For Benefits and Credits customers acceptability of the number of times they had to speak to an adviser was found to be of higher importance.

Table 10 Influence of different factors on overall experience

Customer Experience	Benefits & Credits	Personal Tax	Business Tax
	β	β	β
How good at getting things right first time	0.23	0.28	0.22
Ease of getting in touch	0.21	0.26	0.33
Acceptability of number of times had to speak with an adviser	0.20	0.12	0.15*
How well treated by adviser	0.17	0.14	0.25
If query is now fully resolved	0.11	0.07	0.06*
Adviser had the right level of expertise	0.08	0.09	0.13*
Ease of understanding what to do next	0.07	0.11	-0.03*
Length of time waiting on phone before spoke with an adviser	0.05	0.04	0.04*
Number of times called helpline before call was answered	0.04	0.06	0.08*
R^2	0.65	0.64	0.67

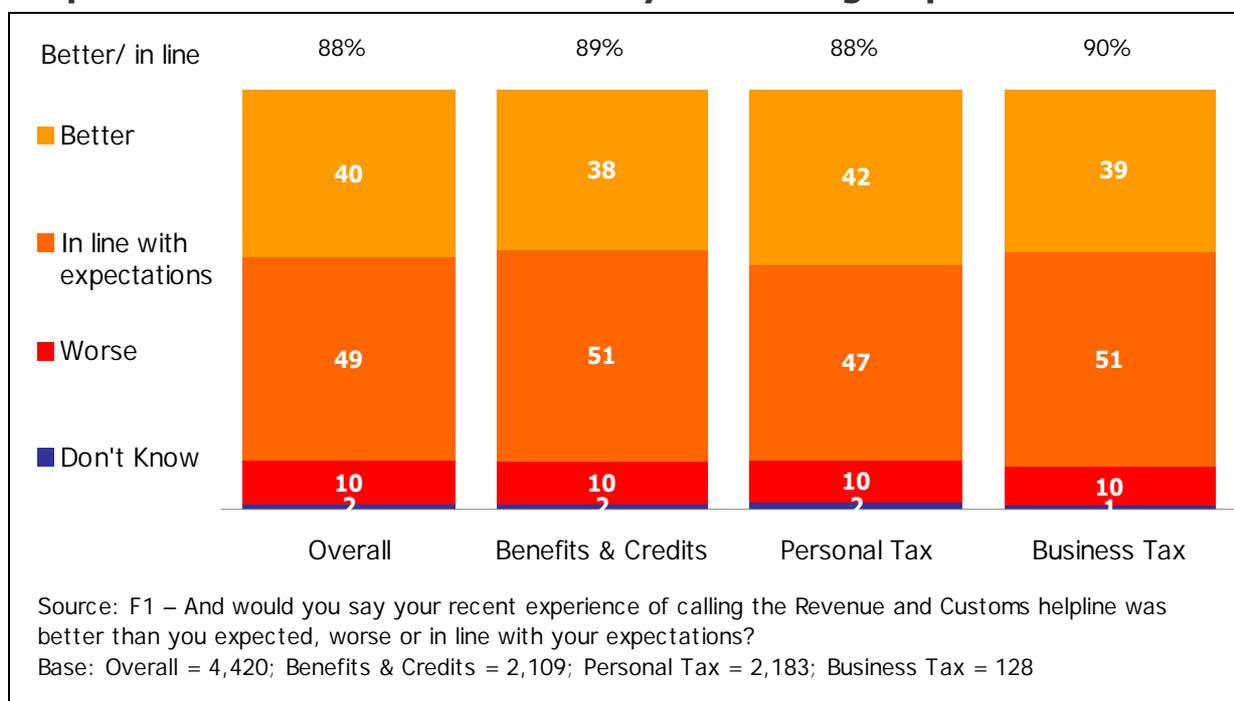
*These were not significant in the regression model.

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 (40%), or in line with their expectations (49%). This is similar to ratings (39% and 50% respectively) reported in April 2012 – March 2013.

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 slightly vary somewhat by business group; customers who contacted the Personal Tax helplines were more likely to say their experience was better than expected (42%) than Benefit and Credit helpline customers (38%). Compared with the 2012-2013 survey, the proportion of Personal Tax customers who found their experience better than expected increased from 41% to 42%. 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, VAT & VAT Online and OSH 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

Helpline	Base	% Better	% Worse	% In line
NI	321	51%	6%	42%
Child Benefit	307	49%	6%	44%
Taxes	1472	42%	11%	46%
VAT & VAT Online	115	40%	9%	50%
Tax Credits	1795	36%	11%	52%
OSH	125	31%	12%	56%

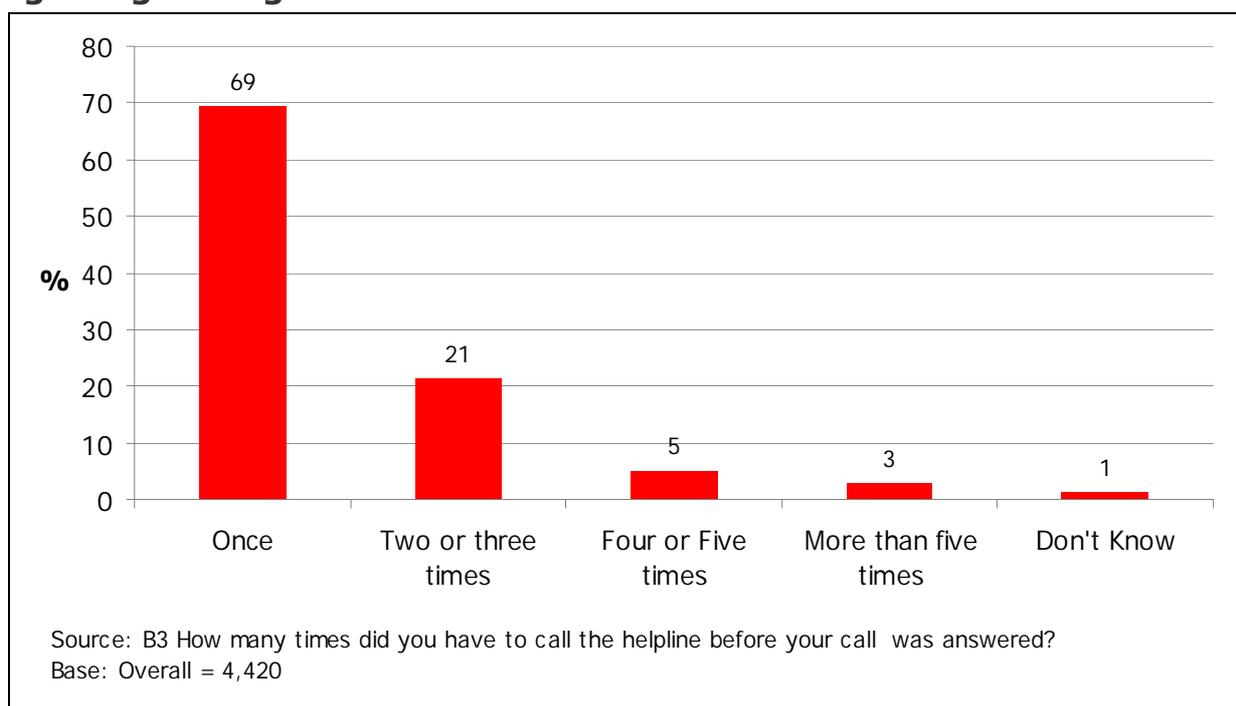
3. Getting in touch with the helpline

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 (69%) 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

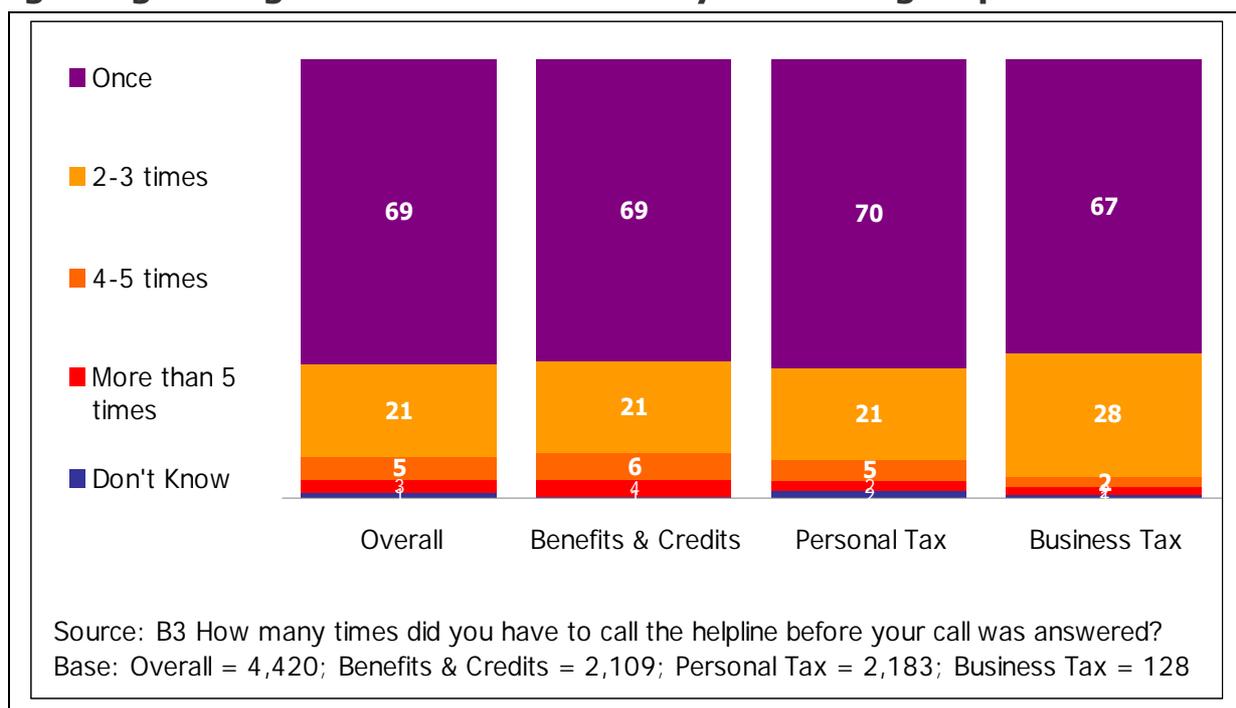


Analysis was also undertaken to identify how much results had changed over time; the proportion of respondents who had to call only once before their call was answered has decreased in the last year from 71% to 69%, this is not a significant change.

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 2012- March 2013 the percentage of customers who had to call Personal Tax helplines only once before their call was answered decreased (from 71% to 70%).

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



Customers calling the National Insurance 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

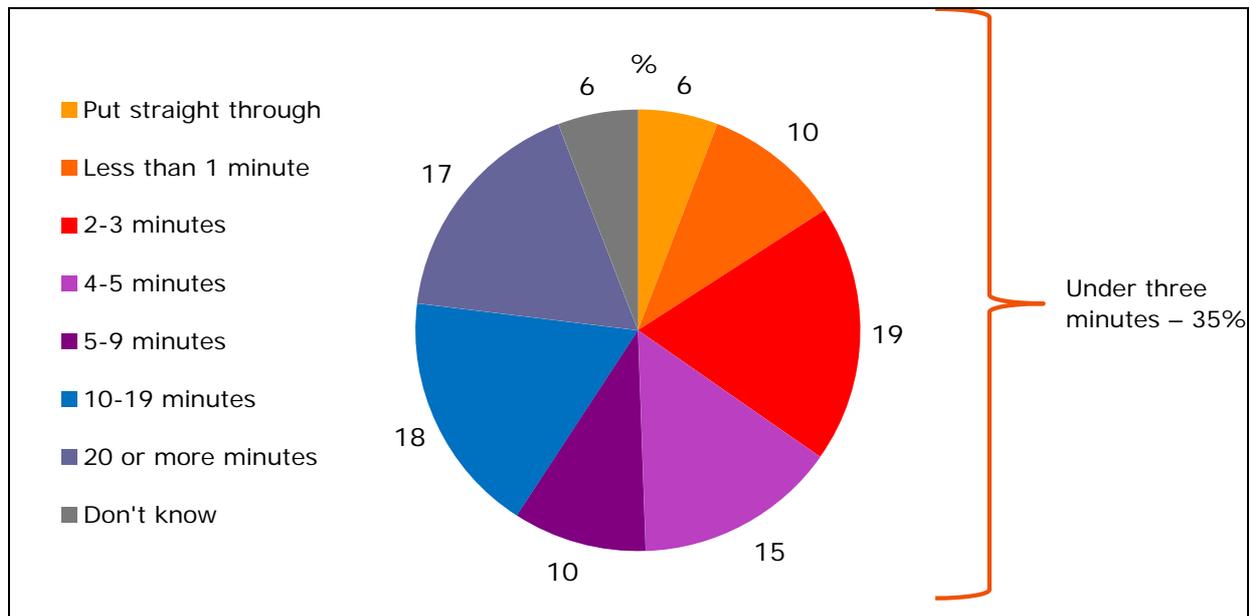
Helpline	Base	% Once	% Two or three	% Four or more
NI	321	77%	18%	3%
Child Benefit	307	74%	20%	4%
VAT & VAT Online	115	73%	19%	7%
Taxes	1472	68%	24%	7%
Tax Credits	1795	66%	25%	9%
OSH	125	61%	29%	9%

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. Just over one-third (35%) reported waiting under three minutes, a quarter (25%) between four and nine minutes and over one-third (35%) over ten minutes. The median waiting time was found to be 4 minutes.

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

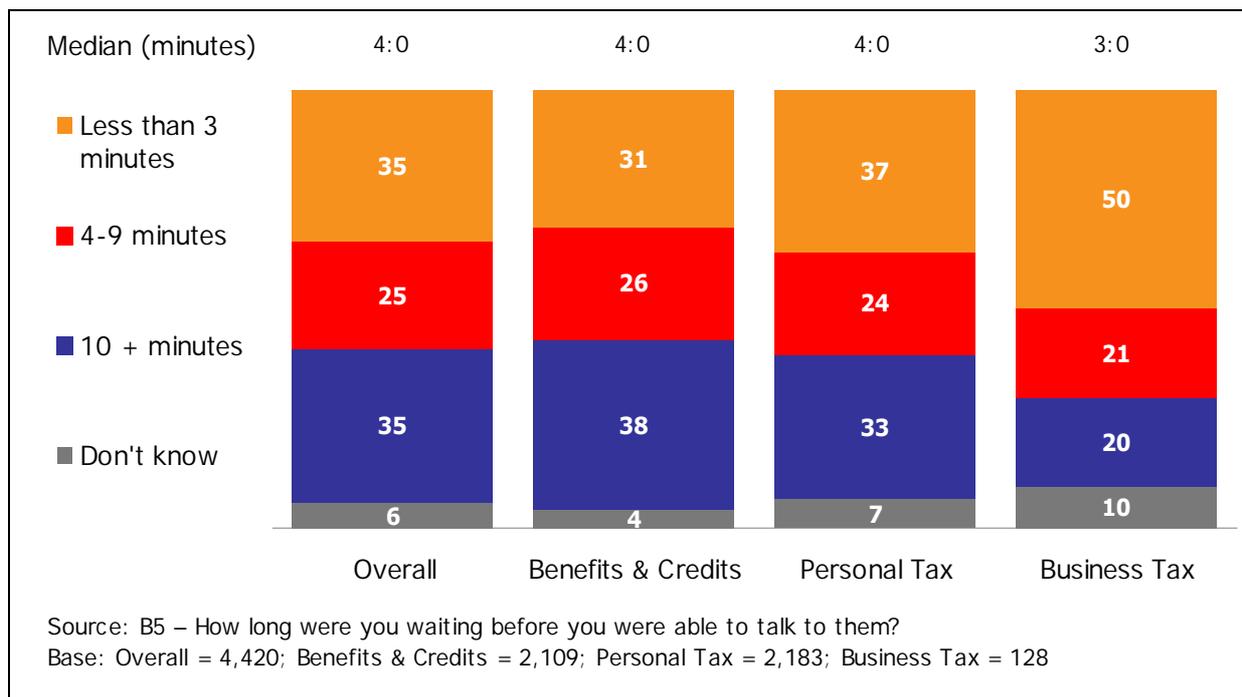


3.2.2 Sub-group analysis

Differences in call waiting time were also analysed across the three main business groups. The Business Tax helplines had a shorter waiting time than the Personal Tax and Benefits and Credits helplines. Waiting times for the Benefits and Credits and Personal Tax helplines were the same, with median waiting times of four minutes. Overall there was a significant decrease in customers waiting less than 3 minutes, and a significant increase reported of customers waiting more than 10 minutes.

The results for Business tax had not changed significantly compared with April 2012 to March 2013. However, the decrease in Benefits and Credits and Personal Tax customers waiting less than 3 minutes was a significant change. While the increase in customers waiting more than 10 minutes (38%) compared with (33%) 2012-13 was a significant change for Benefits and Credits customers.

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



Results were also analysed by the main lines of business. VAT & VAT Online customers did not have to wait for as long as Taxes or Tax Credits 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 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

Helpline	Base	% Less than three	% Four to nine	% 10 mins or more
VAT & VAT Online	115	49%	21%	19%
NI	321	45%	26%	18%
Child Benefit	307	45%	20%	31%
OSH	125	38%	25%	28%
Taxes	1472	33%	24%	37%
Tax Credits	1795	29%	27%	40%

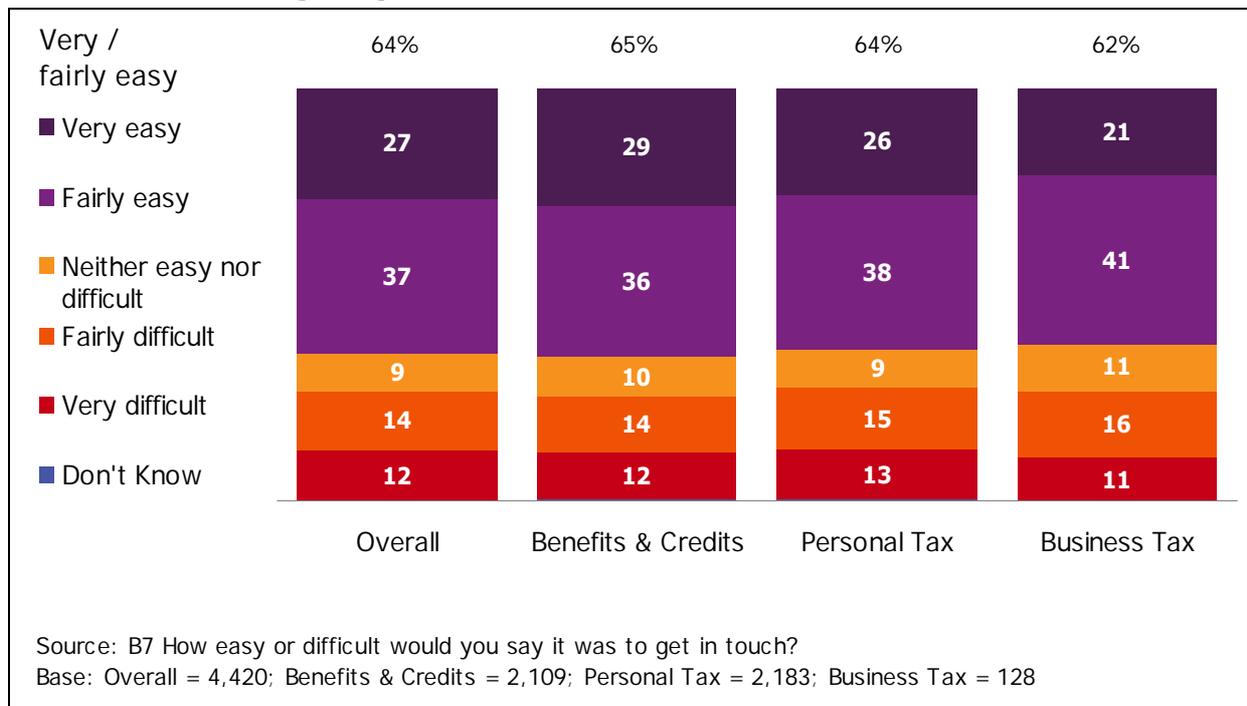
3.3 Overall ease of getting in touch with the helpline

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 have decreased, with two-thirds (64%) finding it very or fairly easy to get in touch.

Results overall have changed significantly over time, 68% of those respondents surveyed between April 2012 and March 2013 rated their ease of getting in touch as very or fairly easy, compared with 64% of those questioned between April 2013 and March 2014.

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



3.3.2 Sub-group analysis

There were no significant differences across the three main business groups in 2013-14.

Between April 2012 and March 2013 71% of Benefits and Credits customers found it very or fairly easy to get in touch compared with 65% of customers between April 2013 and March 2014. This is a significant change.

Differences were also observed across the seven main helplines. As in 2012 to 2013, Child Benefit and NI were rated the easiest to contact and these results were significantly higher than for Tax Credits, Taxes, VAT & VAT Online and OSH. Again, NI was found to outperform the other Personal Tax helplines.

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

Helpline	Base	% very / fairly easy to get in touch
NI	321	79%
Child Benefit	307	78%
OSH	125	63%
Tax Credits	1795	63%
VAT & VAT Online	115	62%
Taxes	1472	61%

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 has remained similar to April 2012 to March 2013 (from 62% to 61% in 2013-14).

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 64%). This was significantly greater than those waiting either four to nine (69%) or ten or more minutes (36%).

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 77% 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 16% 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 (70%) than those who spoke to an adviser more than once.

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

	Base	% very/fairly easy to get in touch with the helpline
Overall sample	4,420	64%
Call waiting time less than three minutes	1,542	89%
Answered on first call	3,084	77%
Spoke only once to helpline adviser about the issue	3,016	70%

Source: B7

4. First contact resolution

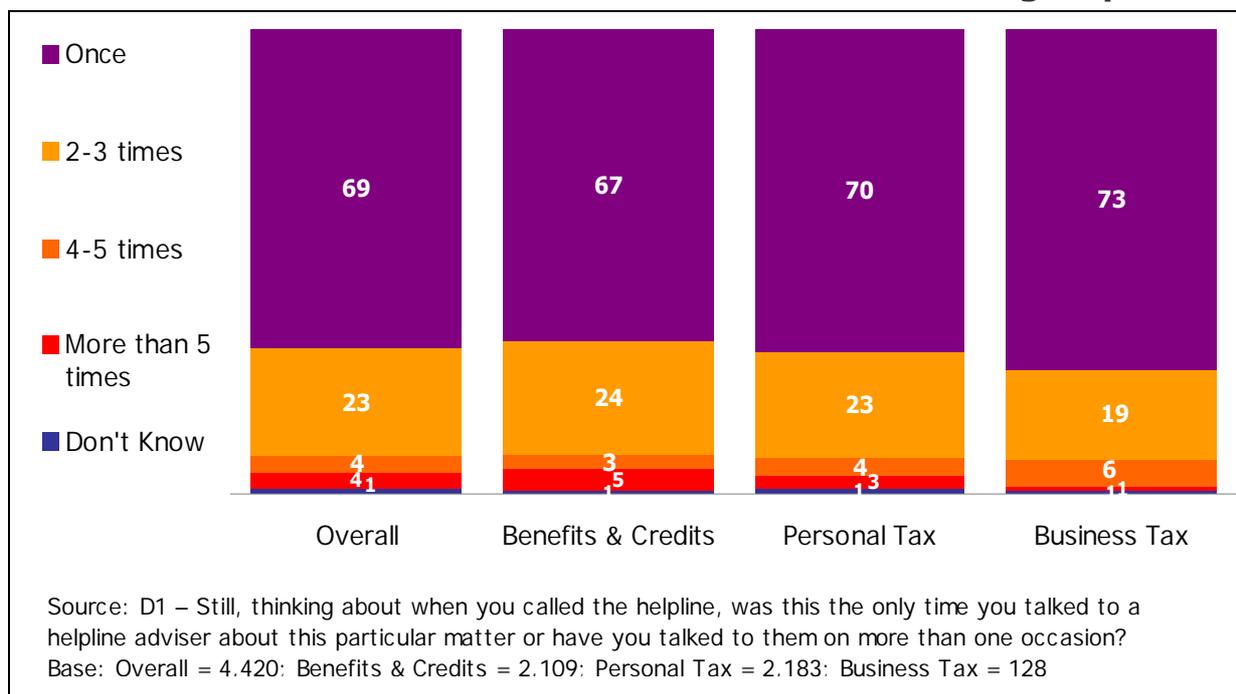
4.1 Number of times the customer had to speak to an adviser about the issue

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 (69%) 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, 70% of customers surveyed between April 2012 and March 2013 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

73% of the Business Tax helplines customers reported calling just once, compared with 67% of Benefits and Credits customers, this is not a significant difference. The results for each line of business were not found to have changed compared with the 2012 to 2013 financial year.

Looking at the results by lines of business, NI and Child Benefit customers were more likely than Tax Credits, OSH and Taxes customers to have only spoken once to advisers. This implies that the overall Benefits and Credits score was lower than all groups as a result of the Tax Credits helpline as 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

Helpline	Base	% Once
NI	321	77%
Child Benefit	307	74%
VAT & VAT Online	115	73%
Taxes	1472	68%
Tax Credits	1795	66%
OSH	125	61%

4.2 Whether the query was fully resolved

4.2.1 Total and trend results

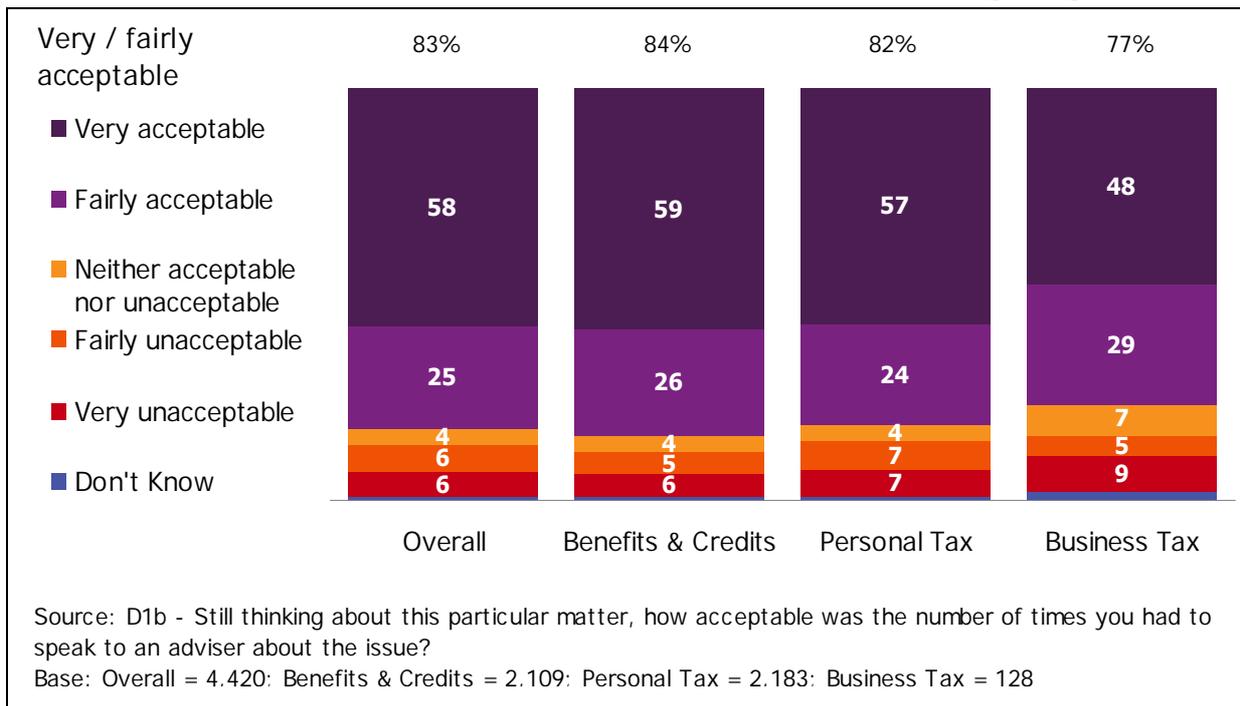
Customers were asked whether or not their query had now been resolved. The vast majority of customers said their query was fully resolved (79%). This was not significantly different from the results from last year (78%).

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, there was no change (83%) from 2012-13.

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 higher than Personal Tax (84% acceptability compared with 82%). Business Tax acceptability scores decreased from 87% in 2012-13 to 77% in 2013-14 this is not a significant change. Benefits and Credits customers said they needed to make multiple calls due to not having all the information needed when they last called (28%) and due to the complex nature of their query (32%).

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 VAT & VAT Online 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

Helpline	Base	% very / fairly acceptable
Child Benefit	307	90%
NI	321	87%
Tax Credits	1795	83%
Taxes	1472	82%
VAT & VAT Online	115	79%
OSH	125	73%

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, 68% of those that had spoken to an adviser two or three times found this acceptable and only 26% 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

Reason for needing to talk to an adviser more than once	Base	% very/fairly acceptable – number of times spoken to an adviser about the issue
Caller did not have all the information needed when they last called	385	71%
Complicated issue	477	51%
Caller had not heard back/received a reply from HMRC	228	38%
HMRC made a mistake	278	36%

Source: D1b

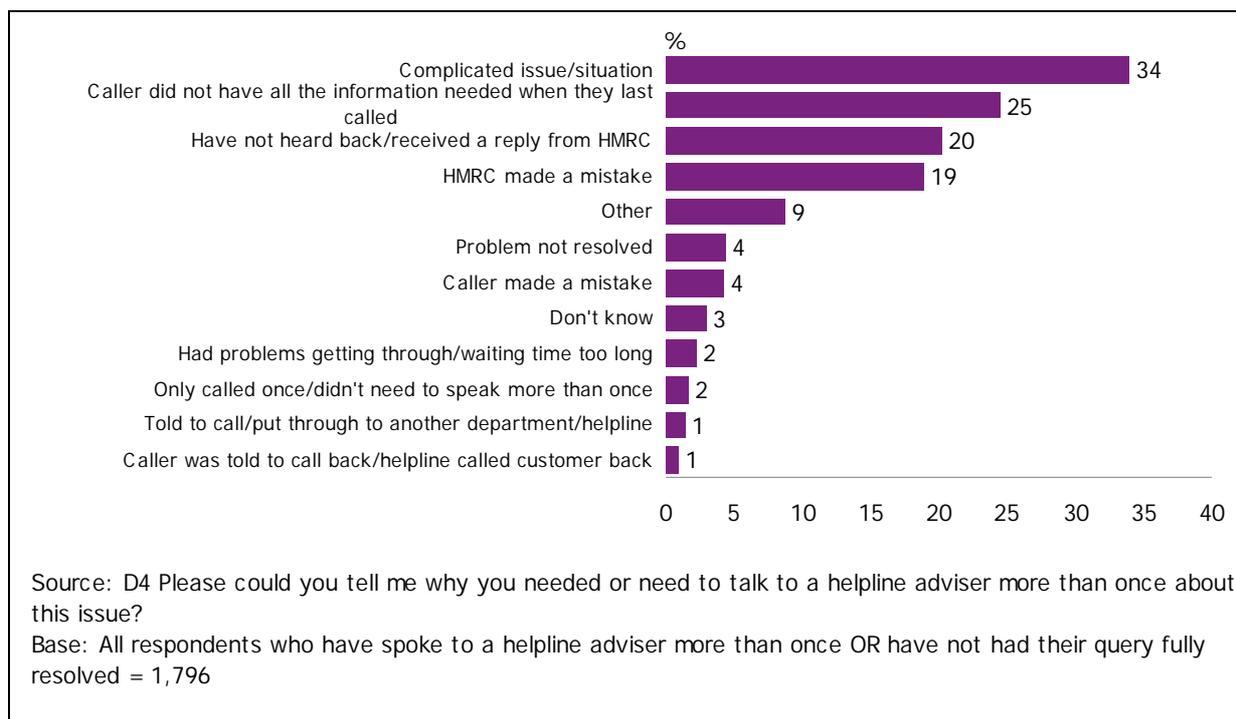
4.4 Reasons for needing to talk to the helpline adviser more than once about the issue

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 34% of respondents. This was followed by the caller not having the information needed when they first called (25%), having not received a call back from HMRC (20%) and HMRC making a mistake (19%) 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 is a significant increase in responses for the caller not having the information needed when they first called compared with 2012-13 (14%). There were no further significant differences.

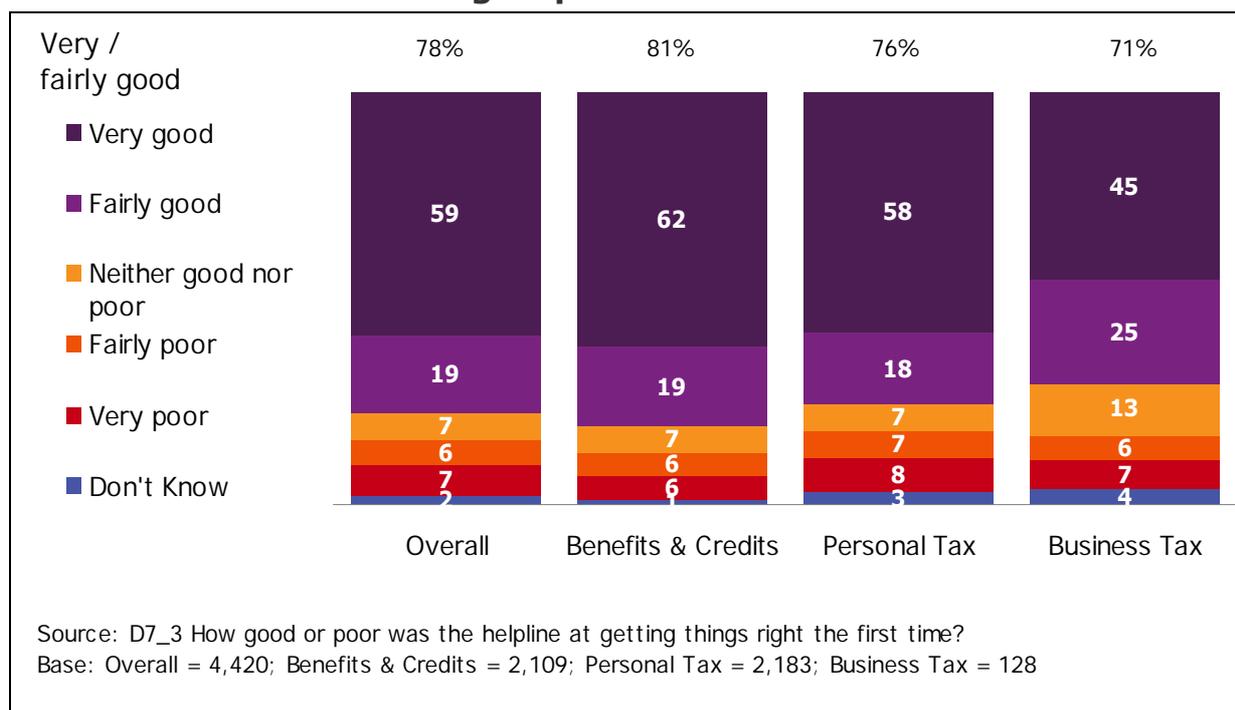
4.5 Rating of helplines getting things right the first time

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 78% of all respondents answering either very good or fairly good to this question.

Responses had not changed significantly over time; between April 2012 and March 2013 79% 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 76% reported for the Personal Tax helplines.

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

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

Helpline	Base	% very / fairly good
Child Benefit	307	87%
NI	321	84%
Tax Credits	1795	80%
Taxes	1472	75%
VAT & VAT Online	115	74%
OSH	125	66%

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, felt that the adviser had the right level of expertise, felt it was easy to understand the information provided by the adviser, and 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

	Base	% very/fairly good at getting things right the first time
Overall sample	4,420	78%
Very/fairly easy to understand what to do next to resolve the query	3,778	85%
Strongly agree/agree the adviser had the right level of expertise	3,860	85%
Very/fairly easy to understand information provided by the adviser	3,916	84%
Strongly agree/agree that adviser understood the query	4,013	84%

Source: D7_3

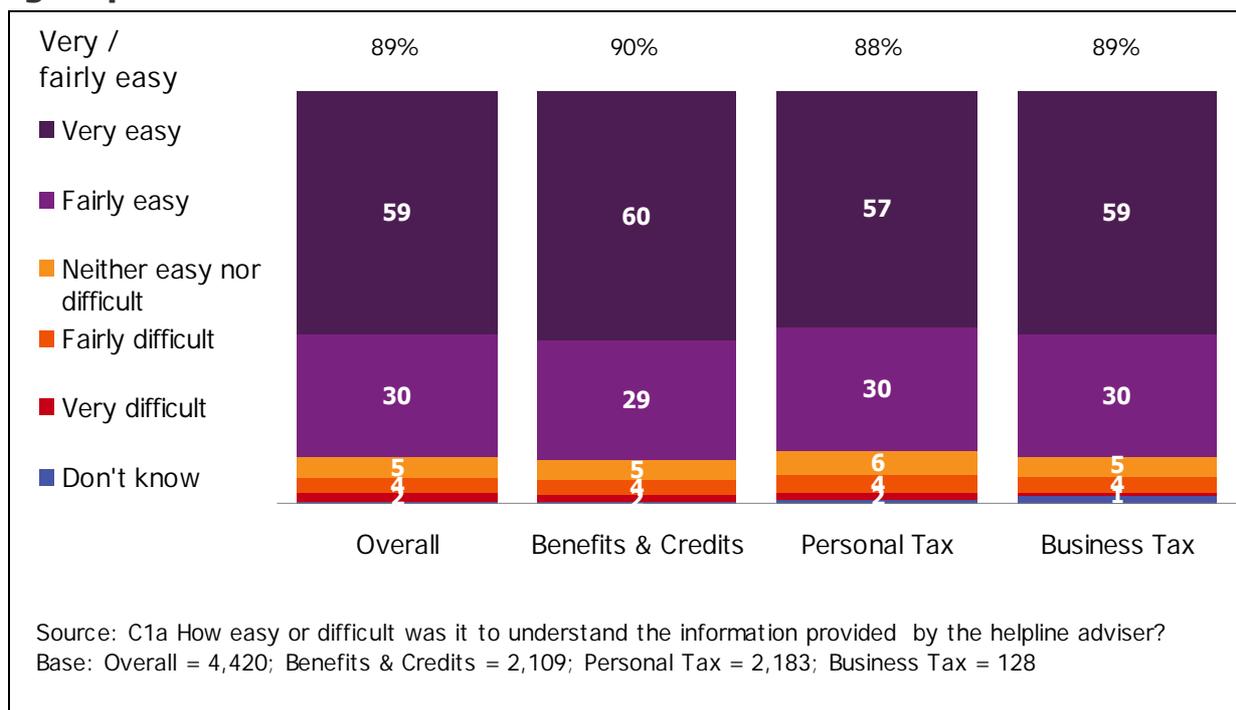
5. Helpline advisers

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, 89% of customers rated this as very or fairly easy. There was no significant change in the ease of understanding information over time; 90% of customers surveyed between April 2012 and March 2013 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

There was little variation in results across the business groups and the results had not changed significantly compared with April 2012 to March 2013.

Customers calling the Child Benefit 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, 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

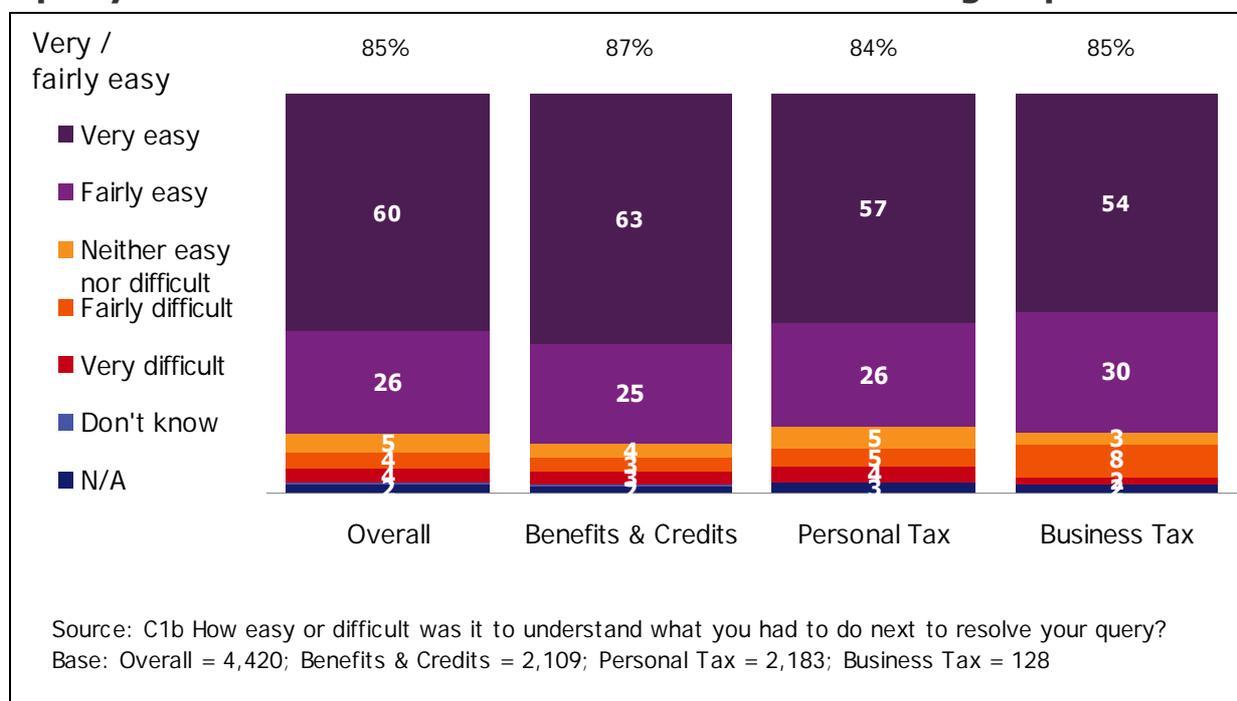
Helpline	Base	% very / fairly easy
Child Benefit	307	95%
NI	321	92%
VAT & VAT Online	115	90%
Tax Credits	1795	89%
Taxes	1472	87%
OSH	125	86%

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 85% of respondents answering very or fairly easy and 8% rating this as very or fairly difficult. Responses stayed consistent with those from April 2012 to May 2013 (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 (87%), significantly higher than Personal Tax (84%). The scores for the three business groups were not significantly different from those for the period April 2012 to March 2013.

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 and OSH. Child Benefit also scored significantly higher than Taxes and OSH helplines.

This is a weak point for the OSH 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. VAT and VAT Online improved from 78% last year to 87% in 2013-14 but this is not a significant change.

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

Helpline	Base	% very / fairly easy
NI	321	90%
Child Benefit	307	89%
Tax Credits	1795	87%
VAT & VAT Online	115	87%
Taxes	1472	83%
OSH	125	74%

The percentage of customers rating each helpline as very or fairly easy has not changed significantly compared with April 2012 to March 2013.

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

	Base	% very/fairly easy to get in touch with the helpline
Overall sample	4,420	85%
Very/fairly easy to understand the information provided by the adviser	3,916	92%
Strongly agree/agree the adviser had the right level of expertise	3,860	91%
Strongly agree/agree that the adviser understood the query	4,013	90%

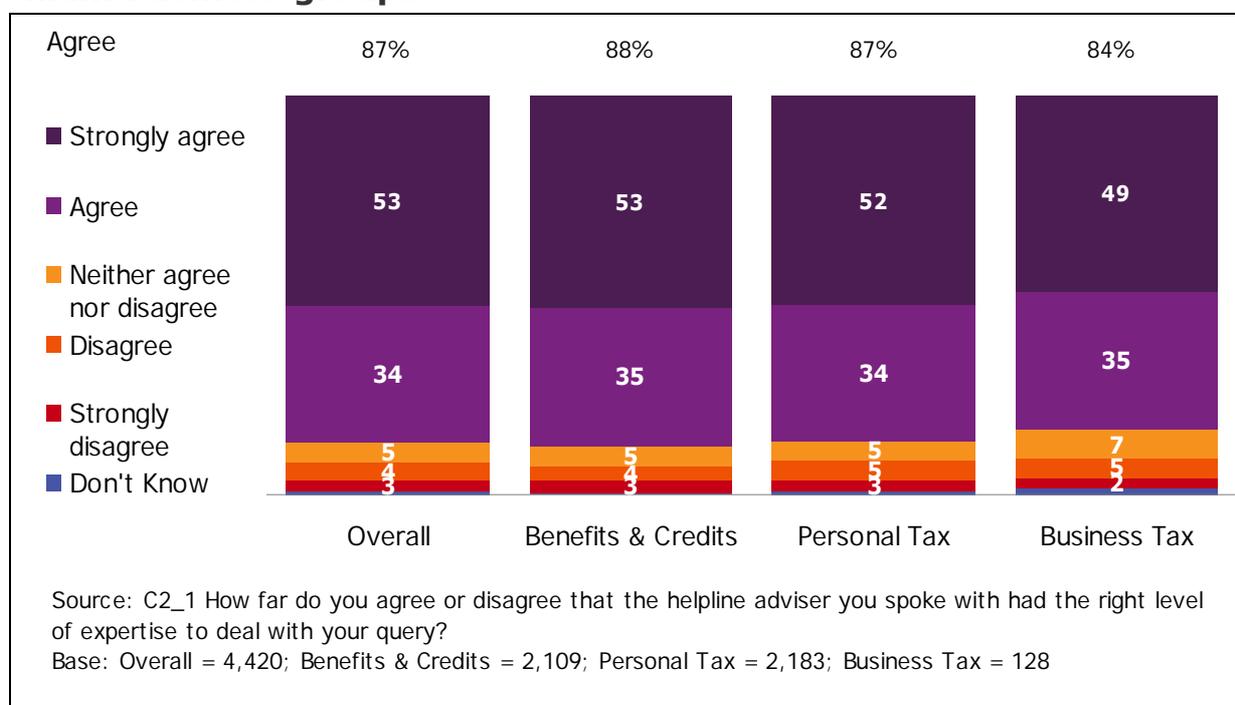
Source: C1b

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 87% of respondents agreeing with the statement, no change from the scores reported for April 2012 to March 2013.

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 to deal with the query than customers of the OSH helpline.

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

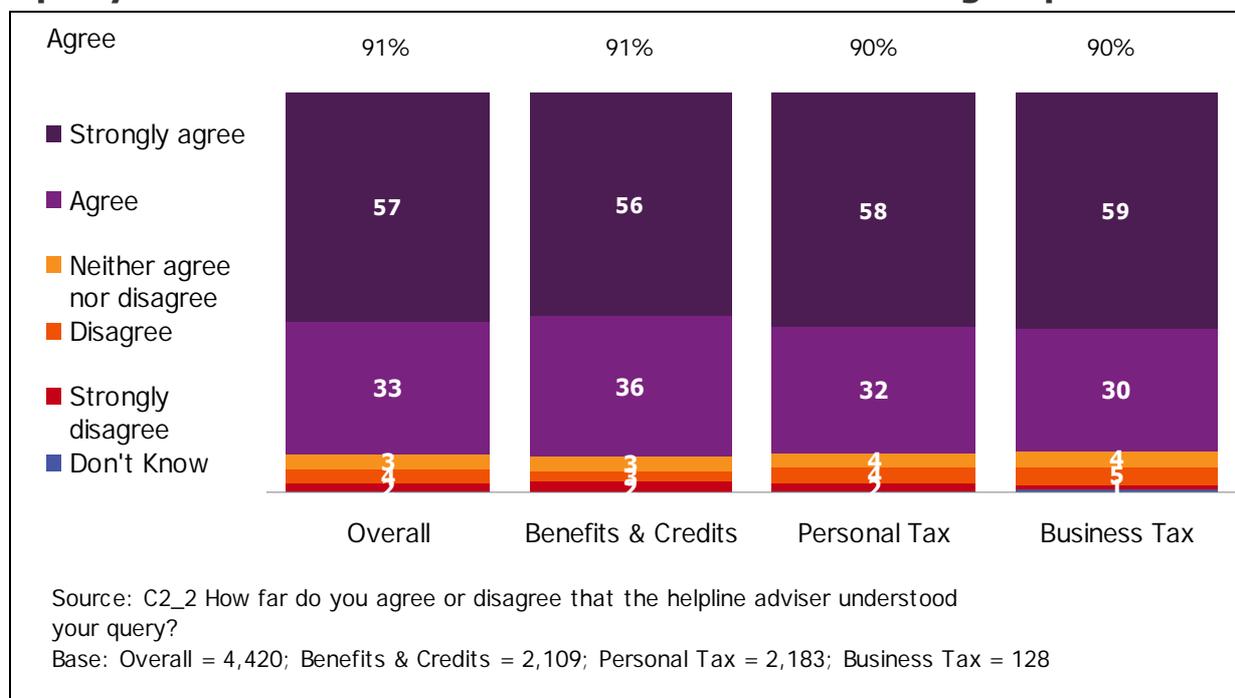
Helpline	Base	% agree
NI	321	92%
Child Benefit	307	91%
Tax Credits	1795	87%
Taxes	1472	87%
VAT & VAT Online	115	83%
OSH	125	79%

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 five point scales with answers ranging from strongly agree to strongly disagree. Overall 91% of respondents agreed with this statement. Results are similar to last year; 92% agreed or strongly agreed between April 2012 and March 2013.

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 Child Benefit helpline were most likely to agree that the adviser understood their query.

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

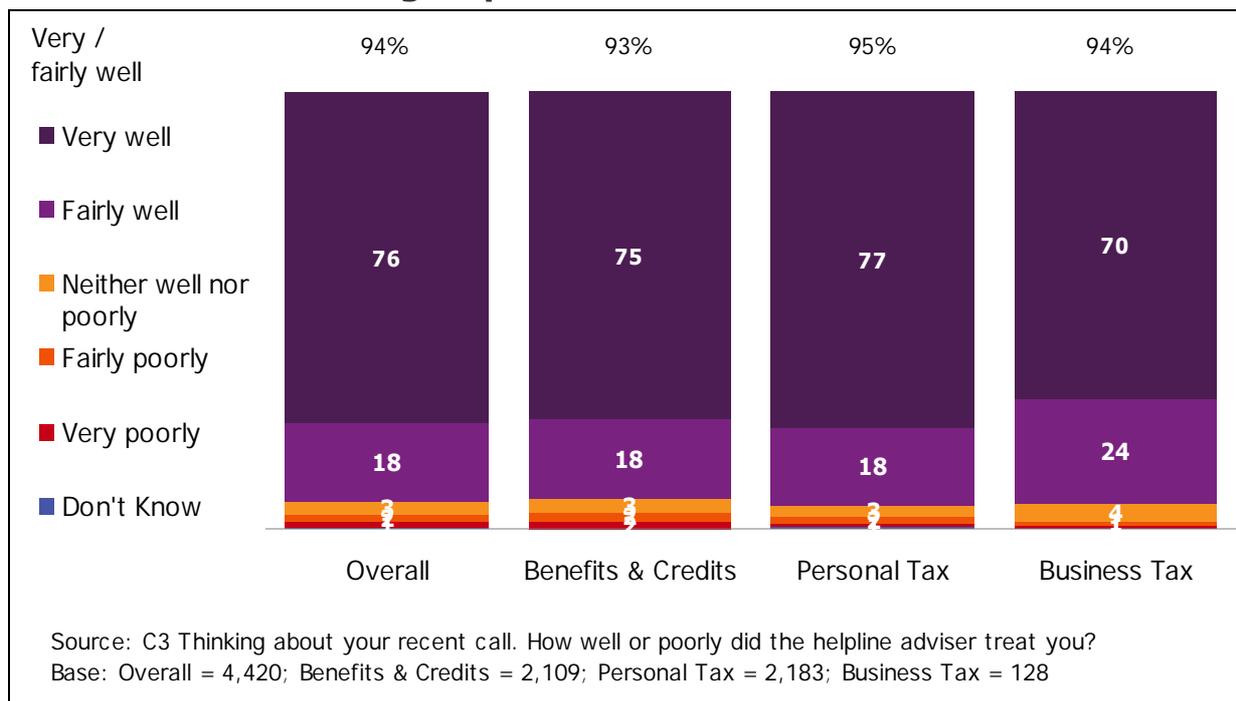
Helpline	Base	% agree
Child Benefit	307	94%
NI	321	93%
Tax Credits	1795	91%
Taxes	1472	90%
VAT & VAT Online	115	90%
OSH	125	86%

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 2012 and March 2013 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 are similar by helpline and there were no significant changes compared with last year.

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

Helpline	Base	% very / fairly well
OSH	125	96%
Child Benefit	307	96%
NI	321	95%
Taxes	1472	94%
VAT & VAT Online	115	94%
Tax Credits	1795	93%

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 (28%), polite/courteous (28%) and answered the question (17%).

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 being rude or unpleasant (41%) and poor service (25%).

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 (3,352)	%	Why customers felt they were treated very poorly (55)	%
They were helpful	28%	Rude/unpleasant	41%
They were polite/courteous	28%	Poor service	25%
Answered the question	17%	Staff could not help me/answer my query	21%
They understood customer's needs/ what they wanted	16%	Took too long to get through to them/had to wait too long	3%
Sorted the problem/ query	14%		
They were nice/ a nice person/ nice manner	13%		
Explained everything / went through things with the customer	11%		
They were knowledgeable/ clever/ knew what they were doing	9%		
They were quick	9%		

6. Improvements

6.1 How the service received could be improved

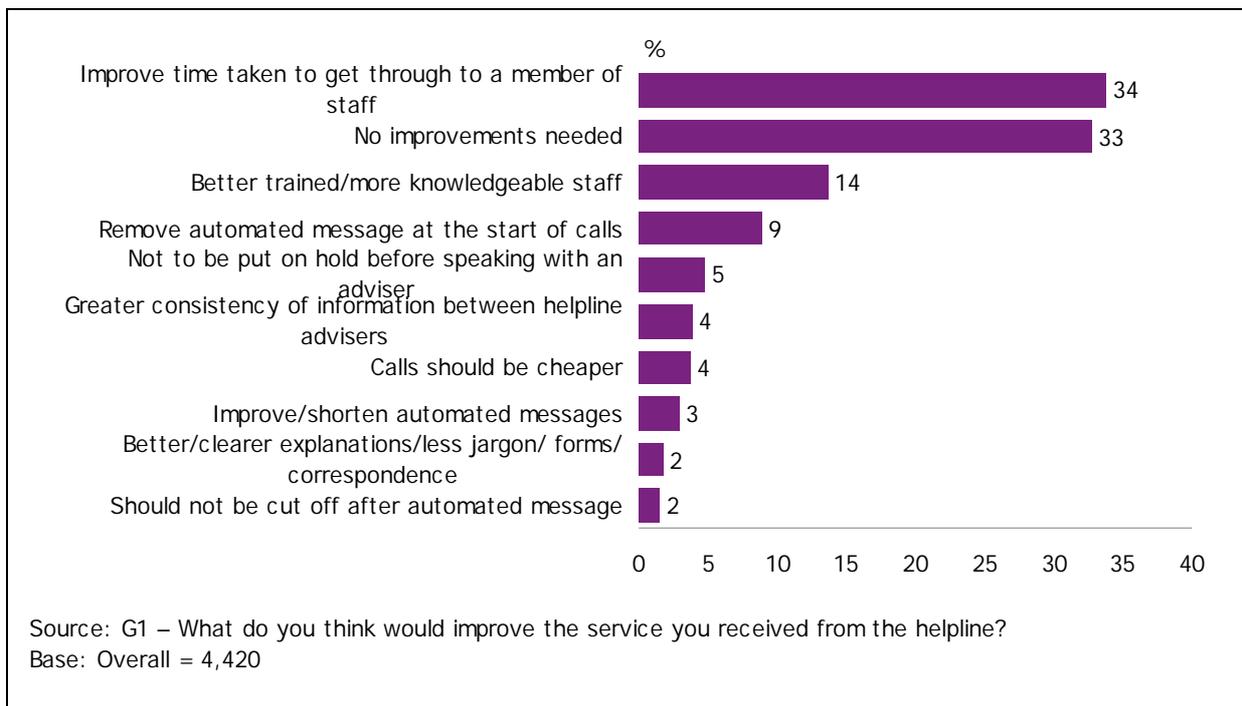
6.1.1 Total results

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. One of the most common answers was that no improvements were needed, with around a third of customers (33%) answering this.

The top two improvements suggested were reducing the time taken to get through to a member of staff (34%) 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, there were similar views that no improvements were needed, Business Tax helplines (30%) compared with Benefits and Credits (33%) and Personal Tax (33%) helpline customers. However, the need to improve the time taken to get through to a member of staff was greater amongst Personal Tax (32%) and Benefits and Credits customers (36%) than their Business Tax counterparts (26%).

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 Tax Credits, OSH, VAT & VAT Online and Taxes). In contrast to this, Tax Credits 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. OSH and VAT & VAT Online customers were most likely to think that staff needed to be better trained or more knowledgeable, while Child Benefit were least likely to think this.

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

Helpline	Base	No improvement needed	Improve time taken to get through	Better trained/ more knowledgeable staff
NI	321	47%	24%	10%
Child Benefit	307	43%	28%	7%
OSH	125	33%	21%	19%
Tax Credits	1795	32%	38%	14%
Taxes	1472	29%	35%	14%
VAT & VAT Online	115	28%	25%	15%

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 2012 to March 2013.

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.

The results from the survey and the Key Driver Analysis indicated that the main areas which could be improved are getting things right first time and 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. While the median waiting times have decreased, customers reported waiting over 10 minutes has increased.

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 less well in comparison with the other lines of business. 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 (68% of men surveyed) and women were more likely to have contacted a Benefits and Credits helpline (55% of women surveyed). Younger customers (those aged under 50) were found to be more likely to have contacted Benefits and Credits, whilst older customers 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 nature of the service provided by the helplines that customers contacted rather than to the characteristics of the customer.

Table 45 Line of business group contacted by demographics

Helpline	Base	Benefits & Credits	Personal Tax	Business Tax
Sex				
Male	1,814	27%	68%	4%
Female	2,606	55%	43%	2%
Ethnicity				
White	3,598	44%	54%	2%
BME ²	569	56%	43%	1%
Age				
29 or under	809	52%	47%	1%
30-49	2,142	57%	42%	1%
50-64	950	29%	68%	3%
65+	297	7%	90%	2%
Working status				
Employed	2,323	45%	54%	1%
Retired	364	9%	90%	1%
Not working	994	73%	27%	0%
Self employed	543	28%	67%	6%

Overall customer experience

Women were more likely than men to report that their overall experience was good or very good (82% compared with 77%). 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.

² Black and Minority Ethnic

Ease of getting in touch

All customer groups by working status gave similar ratings to ease of getting in touch. Retired customers were slightly less likely than those not working to have rated it very or fairly easy to get in touch (61% and 68% respectively), but not a significant difference.

Advisers

The main differences observed were by age. More elderly customers (those aged 65+) were less likely to have found it easy to understand what to do next to resolve their query compared with ratings from customers aged 49 or under. The results are shown in Table 46.

Table 46 Ease of understanding by age and working status

Helpline	Base	Very / fairly easy to understand the information provided	Very / fairly easy to understand what to do next to resolve query
Age			
29 or under	809	89%	87%
30-49	2,142	89%	86%
50-64	950	87%	84%
65+	297	87%	79%
Working status			
Employed	2,323	88%	85%
Retired	364	89%	82%
Not working	994	88%	87%
Self employed	543	90%	86%

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.

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	%	%
Sex			
Male	1,814	41%	42%
Female	2,606	59%	58%
Ethnicity			
White	3,598	81%	86%
BME	569	13%	13%
Age			
19 or under	54	1%	1%
20-29	755	18%	18%
30-39	1,076	25%	25%
40-49	1,066	25%	25%
50-59	698	17%	17%
60-64	252	6%	6%
65-69	172	4%	5%
70-79	91	2%	2%
80 or over	34	1%	1%
Working status			
Full time	1,515	36%	36%
Part time	851	20%	20%
Self employed	543	13%	13%
Student	86	2%	2%
Retired	364	9%	9%
Not working	865	20%	20%

Sample profile – Reason for calling helpline

	Unweighted		Weighted
	Count	%	%
To ask a question	2,901	66%	66%
Regarding a specific/ongoing issue	1,833	41%	42%
To notify Revenue and Customs of a change in personal circumstances/details	1,731	39%	38%
To correct an error	1,025	23%	24%
To find out where to find information	933	21%	21%
To make an application	725	16%	16%
To query a bill	606	14%	14%
To ask for a form	515	12%	11%
To make a transaction	252	6%	6%
To check details/ information	243	5%	6%
To make a complaint	188	4%	4%