



Valuation Office
Agency

Customer Tracking Survey Report

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Background



VOA and its customers

The Valuation Office Agency (VOA) provides the Government with property valuation and advice required to support taxation and benefits. Information and Analysis is a Directorate within the Strategy Group of the VOA. Its role is to make the best use of VOA's existing data and, where appropriate, gather new data in order to provide a robust evidence base for decision makers. As part of its role, it gathers evidence to understand customers' views and experience of the services that the Agency provides.

The VOA's customers include (i) business property owners/leases who appealed their Rateable Value (RV) for a commercial property; and (ii) domestic respondents who appealed their Council Tax (CT) banding for a property. Customers can initiate the appeal by themselves or employ an agent to manage the appeal on their behalf.

Why do we run the Customer Tracking Survey?

The VOA's external research programme is designed to help the Agency to deliver its objective that our customers have confidence in our valuation and advice. This includes running surveys to track customers' perceptions over time, which helps us understand how we can improve our service, what types of information we can provide, and how to assist customers navigate the appeal process.

The customer tracking survey is run on a quarterly basis with customers who have challenged/appealed their Non-Domestic Rating (NDR) or Council Tax (CT) valuation. The survey collects robust and reliable data about:

- Characteristics of the appellants and the appealed properties;
- Customers' understanding of the valuation process (both before and after the appeal process);
- Outcome and length of the appeal;
- Views of their communication with the VOA and, where applicable, the agent;
- Use of the communication channels and preferences for future communication;
- Views on what improvements can be made to current VOA processes.

Customer Tracking Survey 2013/14

This report presents the aggregate quarterly data collected during the survey year 2013/2014 from:

- 2,021 interviews with unrepresented NDR customers and 806 interviews with represented NDR customers;
- 1,258 interviews with unrepresented CT and 541 with represented CT customers.

The NDR surveys exclude large businesses¹. This exclusion is made with a view to conducting separate research with this group.

The group of represented NDR and CT customers were first surveyed in 2013/14. The inclusion of represented customers this year represents the second stage of the VOA's broader programme of customer research which aims to improve the service we provide to all our customer. Represented CT customers were surveyed in each quarter of the year whilst represented NDR customers were surveyed biannually. Fewer interviews were conducted with represented than unrepresented customers, as the former tend to have less direct contact with the VOA. The number of interviews conducted with each customer group is to be reviewed for future surveys.

The 2013/14 report also draws comparisons with the results from the first-year survey which are based on data from 1,255 interviews with unrepresented CT customers and 2,027 interviews with unrepresented NDR customers.

As part of the development work undertaken in the customer research programme, certain sampling criteria have been revised, in particular the definition of success in the appeal outcome. Consequently, some of the 2012/13 figures have been slightly revised from last year's publication.

The data collection for the 2013/14 survey was conducted between June 2013 and April 2014 using Computer Assisted Telephone Interviewing (CATI). A random probability sampling method was used whereby the VOA selected the sample randomly within each individual stratum from the total flow of cases in each quarter. The unrepresented data was weighted wave-on-wave to reflect the following: the customer profile; caseload of the regional VOA unit for that quarter; appeal outcome (successful/unsuccessful); and, for CT data only, the type of appeal i.e., informal (CR15) or formal (IPP). The represented CT data was weighted by appeal outcome (successful/unsuccessful) and appeal type. The represented NDR data was weighted by appeal outcome and region².

This report only discusses differences that are statistically significant at the 95% level of confidence.

Where percentages do not sum to 100 percent, or to a certain aggregate score, this may be due to computer rounding, or multiple-answer survey questions.

¹ Large businesses are defined by criteria such as size of staff, turnover or whether the business is on the Valuation Office Ratepayer Contact (VORC) scheme.

² Represented NDR customers who were routed from the unrepresented sample were unweighted. For further details about screening questions used in survey year 2013/14, see the accompanying Technical Report.

Key Findings



- Among unrepresented NDR customers, the proportion who rated their overall experience with VOA as good fell between 2012/13 and 2013/14. Similarly, the proportion who felt that the VOA had dealt with their case fairly was lower in 2013/14 than in 2012/13. This fall is not however reflected among unrepresented CT customers, or in most other questions about customers' views of VOA. The VOA is undertaking further research work to examine the reasons for these changes observed among unrepresented NDR customers.
- Customers had mixed views on their overall experience of dealing with the VOA. Less than half of unrepresented NDR customers (46%) rated their overall experience as good, while 38% rated it as poor. Among unrepresented CT customers, 55 per cent rated their overall experience as good and 30 per cent rated it as poor.
- Around half of unrepresented customers felt that the VOA had dealt with their case fairly (52% of NDR customers and 48% of CT customers). Similar proportions of unrepresented NDR customers say they trust the VOA to get the outcome of their appeal right (50%). This proportion is higher among represented CT customers (60%).
- The outcome of their appeal had a large bearing on customers' views of VOA service and staff: those with a successful outcome were more likely to have positive views, and to say they understood the way properties are valued than those with an unsuccessful outcome. Less than half of unrepresented customers (48% of NDR and 42% CT) thought the VOA's decision was right— although this was associated with the outcome of the appeal (i.e., whether their appeal had resulted in a reduction in the Rateable Value or Council Tax band). The figures are slightly higher for represented customers. The degree to which customers said they understood the reasons for the VOA's decision was also associated with the appeal outcome.
- Customers were generally positive about VOA staff, with the majority saying they were polite and friendly, professional, responded to queries in an appropriate timeframe, and had the knowledge and expertise needed (although the latter fell from 72% in 2012/13 to 67% in 2013/14 among unrepresented NDR customers).
- Many unrepresented customers did not have a good understanding of the appeal process and property valuation prior to the appeal. This tends to improve during the course of the appeal. Among unrepresented NDR, the share of those who

said they knew a lot or a fair amount about property valuation increased from 21 per cent at the start to 52 per cent by the end of the appeal process.

- Represented customers are significantly less likely than unrepresented customers to report a good understanding of property valuation at the conclusion of their appeal.
- Unrepresented NDR customers expressed a preference for telephone (52%) and email (52%) as main channels of communication for any future dealings with the VOA. The majority of unrepresented CT customers wish to communicate with VOA via telephone (54%) and letter (51%) in the future - although they expressed an overall preference for using multiple communication channels.

1. Customer Experience and Perceptions



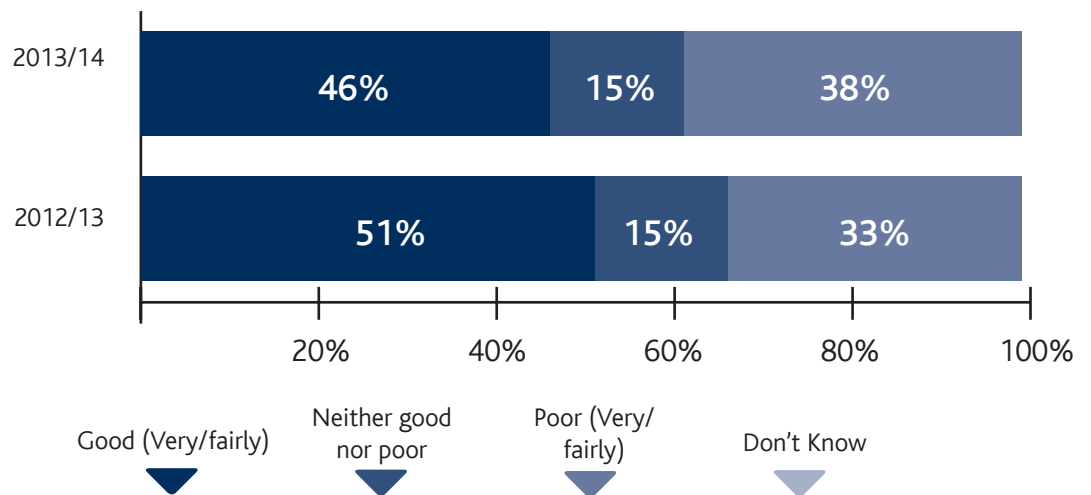
This section summarises the experiences and views of customers who filed an appeal with VOA. It focuses on their perceptions of the VOA staff, the appeal process (including its length, outcome and fairness) as well as their level of knowledge prior and following the appeal.

1.1. NDR

1.1.1 Overall perceptions

Figure 1 shows that less than half (46%) of the unrepresented customers rated their overall experience of dealing with the VOA as good³. This is lower than in 2012/13, when 51 per cent gave a positive rating. The proportion who rated their overall experience as poor was 38 per cent in 2013/14, an increase on the previous year (33%) (Figure 1.1).

Figure 1.1: Overall experience of dealing with the VOA, unrepresented NDR customers, 2012/13 – 2013/14



Sample: All unrepresented NDR respondents who had direct contact with the VOA 2013/14 (1,829); 2012/13 (1,764).

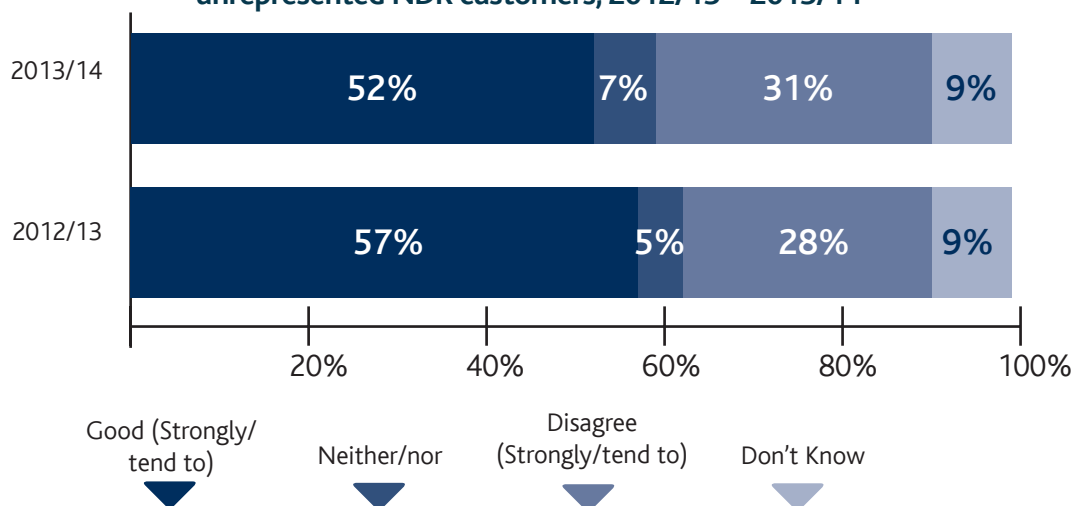
Question: Putting aside the final outcome, and thinking just about the service you received, how would you rate your overall experience of dealing with the VOA?

³ This question is not asked of represented customers.

Around half of unrepresented customers felt that their case was dealt with fairly⁴. This represents a fall from 57 per cent in 2012/13 to 52 per cent in 2013/14 (Figure 1.2).

The VOA is undertaking further research work to examine the reasons for these changes observed among unrepresented NDR customers.

Figure 1.2: Perception that the appeal was dealt with fairly, unrepresented NDR customers, 2012/13 – 2013/14



Sample: All unrepresented NDR respondents 2013/14 (2,021); 2012/13 (2,027);

Question: Now thinking about the way the VOA works, and your experience of the appeals process, can you tell me whether you agree or disagree with each of the following statements? Your case was dealt with fairly by the VOA.

A similar proportion of unrepresented customers said that they trust the VOA to get the outcome of their appeal right (50% agree; 36% disagree). This has not changed significantly since the previous year (52% agreed and 34% disagreed in 2012-13).

Represented customers have broadly similar levels of trust in the VOA (50% agree and 31% disagree).

The outcome of the appeal had a large bearing on customers' views of VOA service and staff: those with a successful outcome were more likely to have positive views, and to say they understood the way properties are valued. This is explored further in the next section.

1.1.2. Views on the appeal outcome

Of those who have received information on the outcome of their appeal, 42 per cent of unrepresented and 44 per cent of represented respondents received a reduction in RV from their appeal.

Those who received an RV reduction tend to hold more positive views of VOA and the appeal process. This is consistent with the general finding that those who have received an RV reduction are happier with their outcome than those who did not – even though the concept of 'successful appeal' is more complex than this distinction suggests (for example, some appellants receive reductions

⁴ This question is not asked of represented customers.

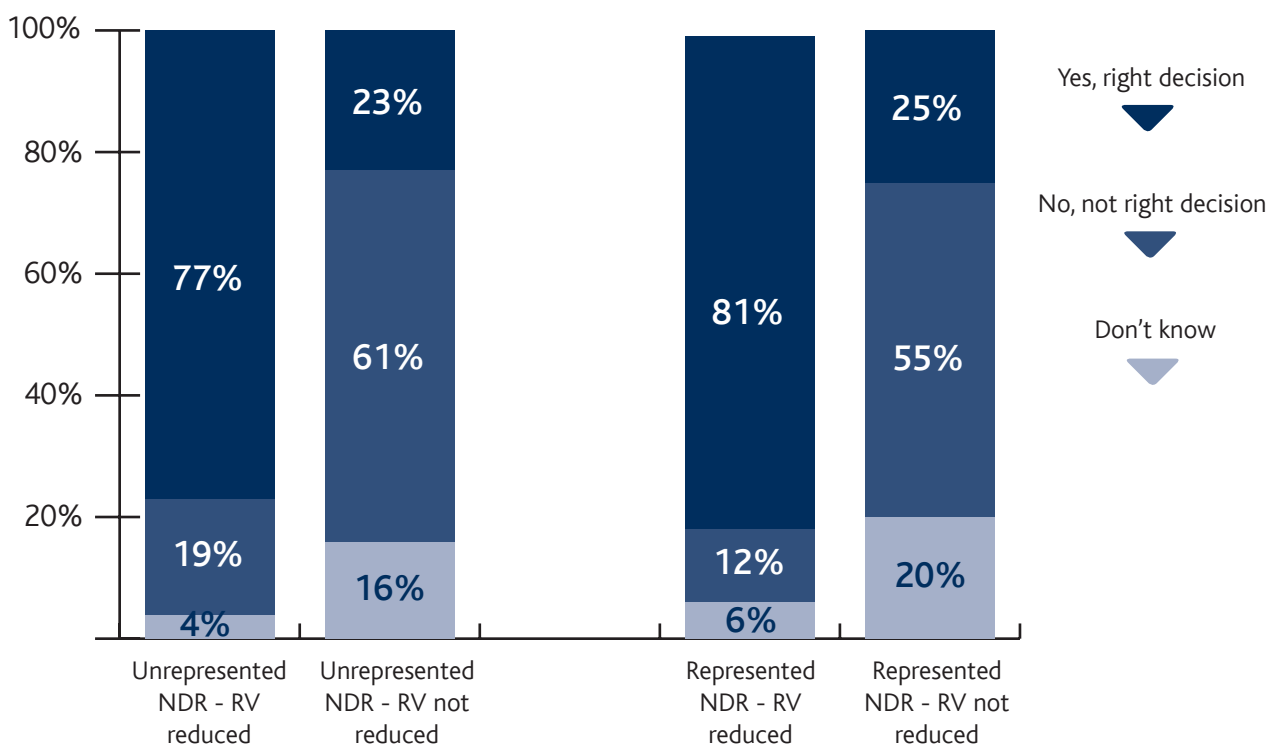
that are less than they hoped for, while others seek other outcomes).

Three in five unrepresented NDR customers (62%) whose RV was reduced rated their overall experience as good, compared with 37 per cent of those whose RV was unchanged or increase. This difference exists despite the question specifically asking respondents to put aside the final outcome of their appeal. Similarly, 77 per cent of those with an RV reduction felt their case had been dealt with fairly, compared to 39% of those who did not receive a reduction.

Nearly half (48%) of unrepresented NDR customers felt that the VOA made the right decision, not significantly different from the figure reported in 2012/13 (51%). During the same period, the proportion of those who felt the decision was wrong increased from 35 per cent to 40 per cent. A similar proportion of represented NDR respondents (49%) agreed that the final decision made by the VOA was right.

These views depend on respondents' appeal outcome (Figure 1.3): those who received an RV reduction were far more likely to say they agreed with the final decision than those whose RV was unchanged or increased (77% versus 23% for unrepresented customers and 81% versus 25% for represented customers).

Figure 1.3: Views on the decision made by VOA, unrepresented and represented NDR customers, 2013/14



Sample: All NDR respondents who are aware that the appeal has concluded: Unrepresented (794 with RV reduced; 901 with RV not reduced); Represented (220 with RV reduced; 240 with RV not reduced)

Question: Overall, did you think that the final decision made by the VOA was the right decision, or the wrong decision?

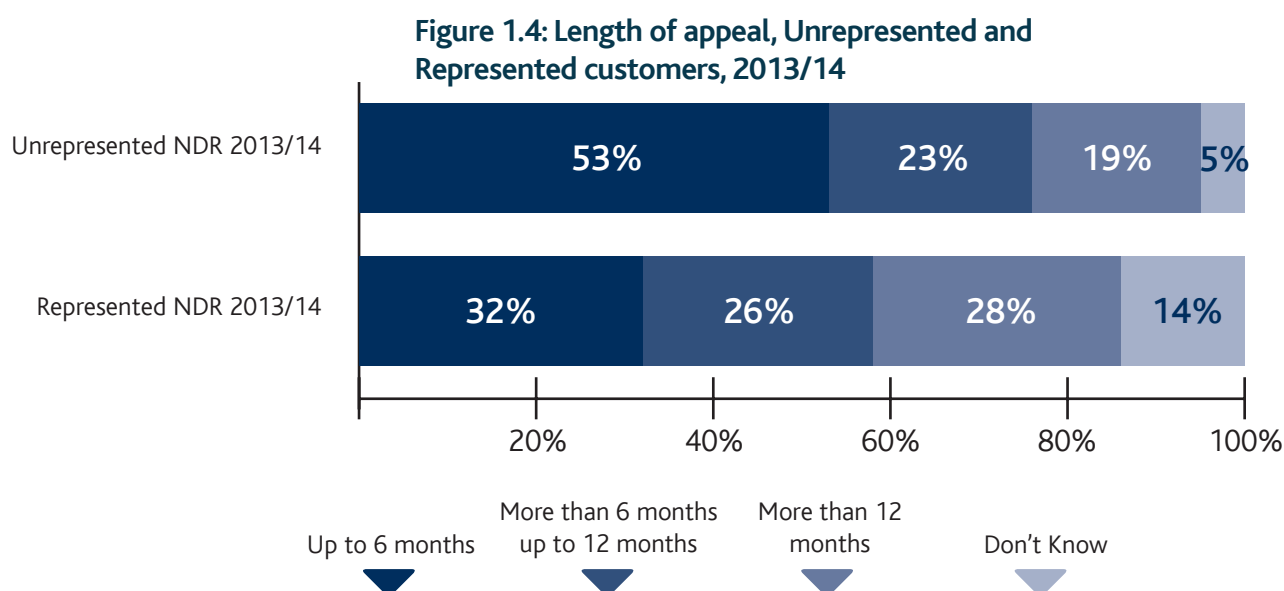
The majority of unrepresented customers (62%) said they understood very or fairly well the reasons for the decision made on their appeal – unchanged from 2012/13. Of represented customers, 53 per cent understood the reasons for their decision at least fairly well. These views are related to the outcome of the appeal: 84 per cent of unrepresented customers whose RV decreased said they understood the reasons for the decision fairly or very well, compared with 45 per cent of those whose RV was unchanged or increased. There was a similar picture - albeit less stark – among represented customers (65% versus 43%).

Among unrepresented⁵ customers who did not understand very well the reasons for the decision taken on their appeal, the most common requests for more information were about: how rateable values are determined (35%) and the appeals process (26%).

1.1.3. Views on the length of appeal

The majority of appeals filed by unrepresented NDR customers were completed within the first 12 months (76%). This is a significant increase from 67 per cent reported in 2012/13. During the same period, the share of appeals which took longer than a year to conclude decreased from 29 per cent to 19 per cent.

On average, appeals took longer for represented NDR customers: 28 per cent said their appeal took longer than a year to complete, and 58 per cent took up to a year (Figure 1.4).



Sample: All unrepresented NDR respondents who are aware that their appeal has been concluded 2013/14 (1,759); represented respondents 2013/14 (806)

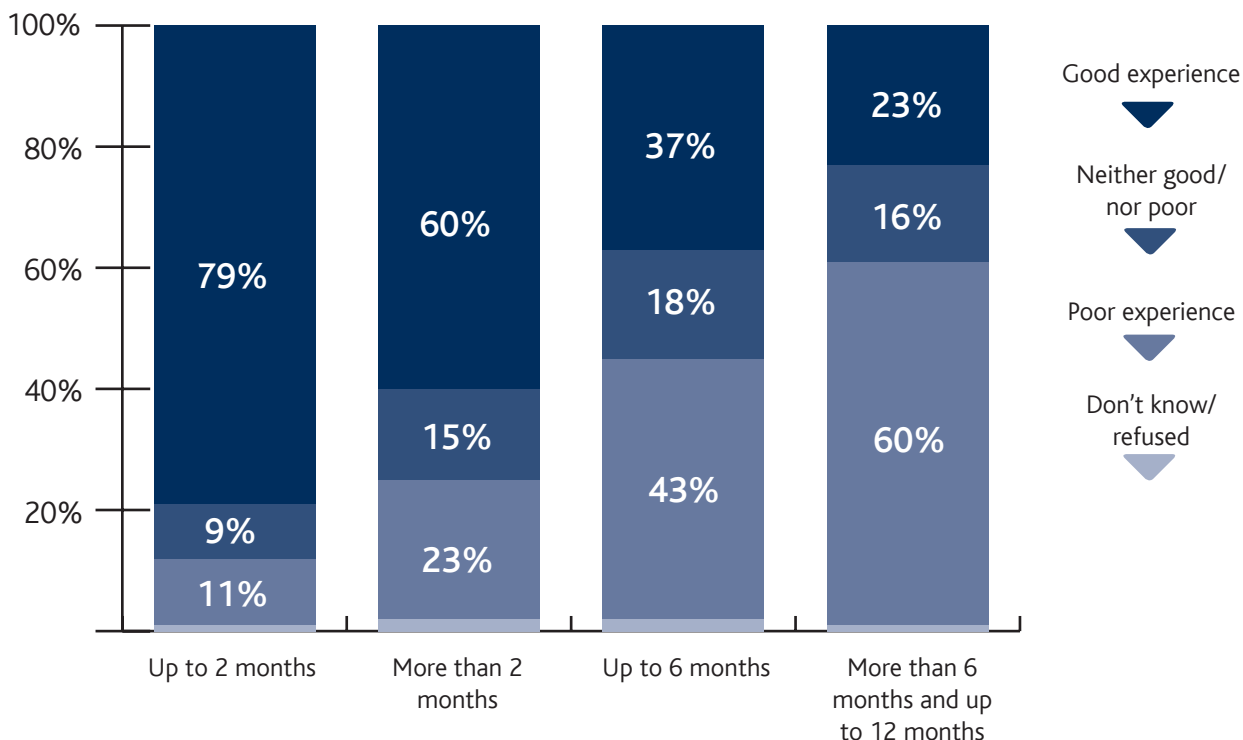
Question: Unrepresented: How long did it take to settle your appeal from the time it started?

Represented: As far as you are aware how long did the [if had decision]/has the [if not aware of decision] appeal take(n) from the time it started?

⁵ Questions not asked of represented customers.

Attitudes to the VOA and the appeal process were also linked to the length of the appeal, with positive views more prevalent among those with shorter appeals. For example, among unrepresented customers, 79 per cent of those whose appeal took less than two months rated their overall experience as good, compared to only 23 per cent of those whose appeal took longer than 12 months (Figure 1.5).

Figure 1.5: Overall experience of dealing with the VOA by length of appeal, unrepresented NDR customers, 2013/14



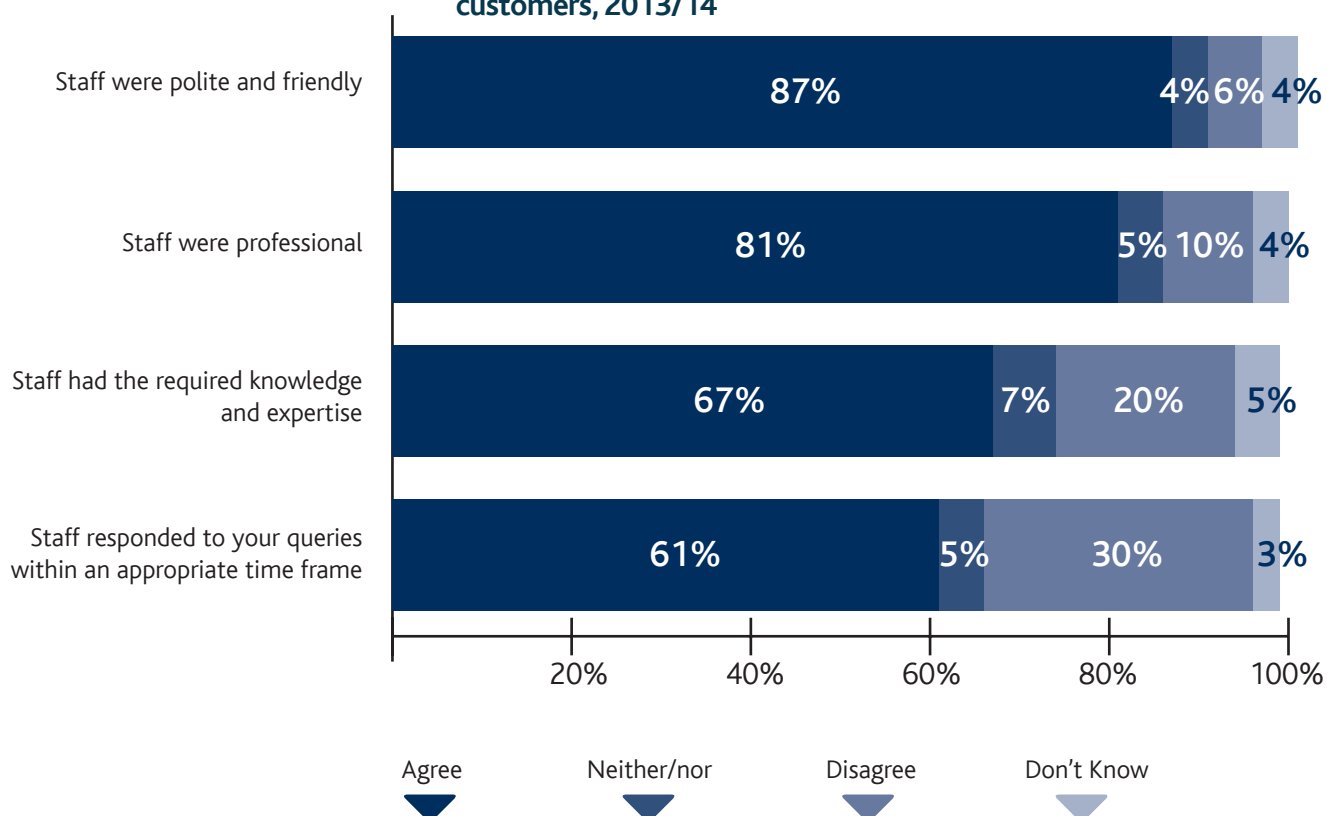
Sample: All unrepresented NDR respondents who made direct contact with the VOA during their appeal 2013/14 (1,829).

Question: Putting aside the final outcome, and thinking just about the service you received, how would you rate your overall experience of dealing with the VOA?

1.1.4. Perceptions of VOA staff

Customers were generally positive about VOA staff. A large majority of unrepresented NDR customers who had direct contact with VOA agreed that VOA staff were polite and friendly (87%), professional (82%), had the knowledge and expertise needed to answer all their questions (67%), and responded to their queries within an appropriate timeframe (61%) (Figure 1.6). These figures are similar to those reported in 2012/13, apart from the proportion reporting that VOA staff had the required knowledge and expertise which has fallen (67% compared with 72% in 2012/13).

Figure 1.6: Attitudes towards VOA staff, unrepresented NDR customers, 2013/14



Sample: Unrepresented NDR respondents who had direct contact with the VOA 2013/14 (1,829).

Question: 'Can you tell me whether you agree or disagree with each of the following statements?'

A much smaller proportion of represented customers had direct contact with the VOA during their appeal (39%), but of those who did, the majority rated VOA staff highly: 83 per cent said they were polite and friendly, 78 per cent that they were professional, and 65 per cent that they had the knowledge and expertise to answer all their questions.

On average, customers with shorter appeals and with favourable outcomes were more positive about VOA staff. Furthermore, customers who had more frequent contact with the VOA also tended to be more positive: 69 per cent of those who had contact at least once a month agreed that VOA staff responded in a timely manner, compared with 55 per cent of those who had less frequent contact.

1.1.5. Positive and negative experiences

The unrepresented NDR customers who mentioned positive aspects about their experience with the VOA most commonly referred to their dealings with VOA staff. Around half (53%) of these customers spontaneously mentioned that the VOA staff were helpful and provided useful information.

“The inspector was very helpful and was fair in dealing with me. He explained everything very clearly and spelt things out to me; he very good. It was a perfect dealing from start to finish.”

Some respondents also referred to the promptness and good communication of staff responses (21% of those who spoke of a

positive experience), while others were pleased with the personal contact or visit they received from a member of the VOA staff (20%).

However, customers also mentioned problems in their dealings with VOA. Around one in four (28%) of those who had a problematic experience said they felt staff were not helpful or did not explain things well enough.

"I just think that a lot of information given could have been made simpler. I had to call up a couple of times to get information sent to me explained. The communication just didn't explain things in plain English and should have been simpler."

One in four (25%) said that there was a lack of communication or response from VOA staff, while 21% said the process took a long time. In addition, 16 per cent mentioned incorrect information or mistakes, 11 per cent said it was difficult to get hold of the right person, and 8 per cent felt there was too much bureaucracy or red tape.

1.1.6. Understanding of the appeal process

Less than half of unrepresented NDR customers (45%) said that the appeal process is easy to understand –the same proportion as those who did not feel that it was easy. Represented customers found it even more difficult – only 29 per cent agreed that the appeal process is easy to understand, while 51 per cent disagreed.

The majority of both NDR groups found it hard to understand the way that the VOA values properties. Only 37 per cent of unrepresented customers and 25 per cent of represented customers agreed that this was easy to understand, with the majority disagreeing (52% of unrepresented and 60% of represented NDR customers).

Nevertheless, the level of understanding improves significantly as customers go through the appeal process. Among unrepresented customers, the share of those who said they knew a lot or a fair amount about property valuation increased from 21 per cent at the start to 52% by the end of the appeal process.

A much smaller proportion of represented NDR customers (25%) report a good understanding of property valuation at the conclusion of their appeal.

1.2. CT

1.2.1. Overall perceptions

The results show that 55 per cent of unrepresented⁶ CT customers rated their overall experience of dealing with the VOA as good, while 30 per cent rated their experience as poor. Both figures are unchanged from 2012/13.

Around half of unrepresented⁷ CT customers felt that their case was dealt with fairly, as was the case in the previous year (48% in 2013/14; 49% in 2012/13). Thirty-nine percent disagreed with this – again almost unchanged from 2012/13 (38%).

Similarly, just under half of unrepresented CT customers said they trust the VOA to get the outcome of their appeal right (47% agree; 43% disagree) – comparable to 2012/13 figures.

Represented customers are more likely than unrepresented customers to say they trust the VOA to get the outcome of their appeal right, with 60 per cent agreeing and 23 per cent disagreeing with this statement.

The outcome of the appeal had a large bearing on customers' views of VOA service and staff; those with a successful outcome were more likely to have positive views, and to say they understood the way properties are valued.

1.2.2. Views on the appeal outcome

For CT customers who have received notification of their appeal outcome, 33 per cent of unrepresented customers and 26 per cent of represented customers received a reduction in CT band.

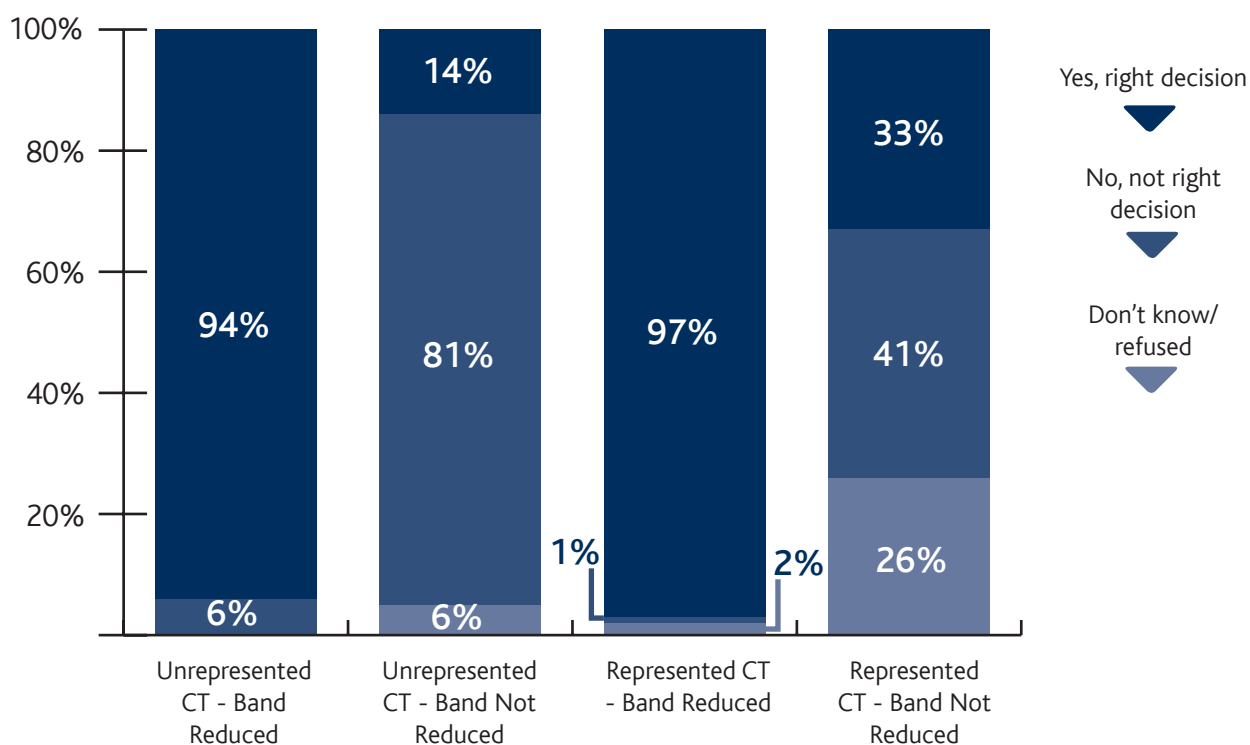
Those who received a band reduction tend to give more positive responses throughout the survey. It is likely that those who received a band reduction will be happier with their outcome than those who did not – even though the concept of 'success' is more complex than this distinction suggests.

For example, 86 per cent of unrepresented customers whose band was reduced rated their overall experience as good, compared with 41 per cent of those whose band was not reduced (despite the question wording specifically asking respondents to put aside the final outcome). Similarly, 92 per cent of those with a band reduction felt their case had been dealt with fairly, compared to 28 per cent of those who did not receive a reduction.

Less than half (42%) of unrepresented CT customers felt that the VOA made the right decision – similar to the proportion in 2012/13 (44%). A larger proportion of represented CT customers (48%) agreed that the final decision made by the VOA was right. These views are also shaped by the appeal outcome (Figure 1.7): those who received a band reduction were far more likely to say the final decision was right than those who did not (94% versus 14% for unrepresented customers and 97% versus 30% for represented).

⁷ This question is not asked of represented customers.

Figure 1.7: Perception of the decision made by VOA, unrepresented and represented CT customers, 2013/14



Sample: All CT respondents who have received a decision: Unrepresented (390 with Band reduced; 785 with Band not reduced); Represented (78 with Band reduced; 238 with Band not reduced)

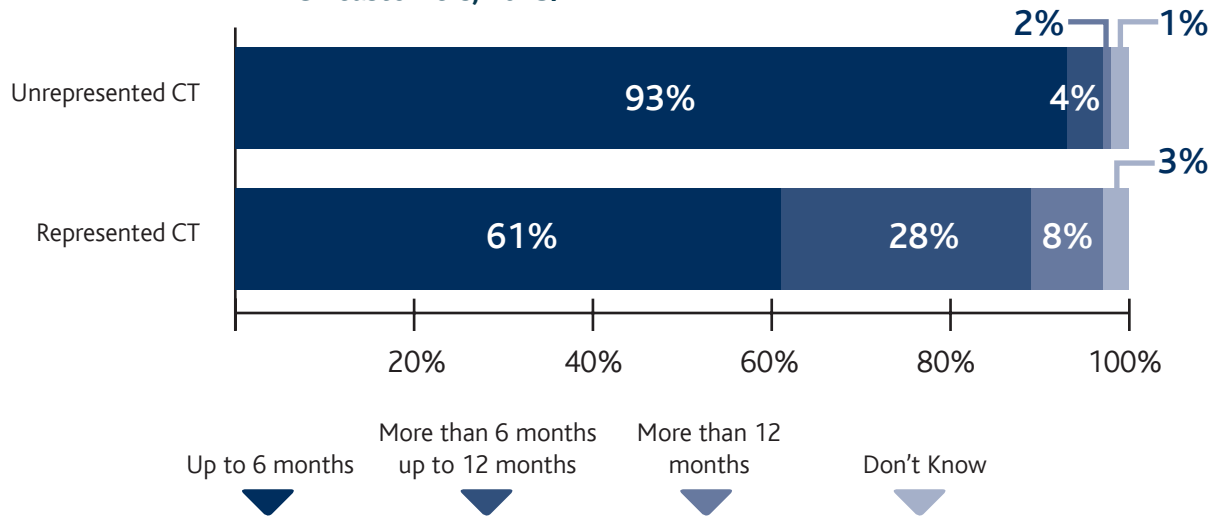
The majority of unrepresented CT customers (58%) said they understood very or fairly well the reasons for the decisions made on their appeal – similar to 2012/13 (56%). The level of understanding among represented customers was lower (43% understood the reasons for their decision at least fairly well).

The level of understanding differed by the outcome of the appeal: 87 per cent of unrepresented CT customers whose band was reduced said they understood the reasons for the decision, compared with 42 per cent of those whose band was not reduced. There was a similar discrepancy among represented customers (65% vs 37%).

1.2.3. Views on length of appeal

Over half of unrepresented CT customers stated that their appeal had taken less than two months (54%) – similar to 2012/13 figure (55%). The vast majority of the unrepresented CT appeals (93%) in 2013/14 were concluded within the first 6 months. By contrast, appeals took longer for represented customers: only 21 per cent of represented customers reported that their appeal had been completed within two months. More than a third (36%) took longer than 6 months (Figure 1.8).

Figure 1.8: Length of appeal, unrepresented and represented CT customers, 2013/14



Sample: All unrepresented CT respondents who are aware that their appeal has been concluded 2013/14 (1,195); represented respondents 2013/14 (541)

Question (unrepresented customers): How long did it take to settle your appeal from the time it started?

Question (represented customers): As far as you are aware, how long did the appeal take/has the appeal taken from the time it started?

1.2.4. Perceptions of VOA staff

Customers were generally positive about VOA staff. A large majority of unrepresented customers who had direct contact agreed that VOA staff were polite and friendly (76%), professional (74%), and that they responded to their queries within an appropriate timeframe (74%). In addition, the majority of this customer group also agreed that staff had the knowledge and expertise needed to answer all their questions (61%). These are similar figures to those in 2012/13.

Those unrepresented CT customers whose band was reduced, who received a visit to their property or who had more frequent contact with the VOA tended to give more positive ratings of VOA staff. This is similar to the results for NDR customers.

Only a small minority of represented customers had direct contact with the VOA during their appeal.

1.2.5. Positive and negative experiences

Around a third of the unrepresented CT customers (34%) who mentioned positive aspects about their experience referred to the VOA staff (e.g., staff being helpful, explaining things well, giving clear answers).

"I started the appeal process knowing nothing about valuations. I had initial telephone contact with somebody in the VOA office who explained everything very clearly and they followed that up with a letter explaining everything. Before they sent a letter with the decision, someone phoned and explained why the decision had been made and how they came to that decision. Overall I thought it was a very good service."

A similar proportion (32%) mentioned good communication, while 22 per cent mentioned staff acting promptly or efficiently, and 20 per cent mentioned their satisfaction with the outcome.

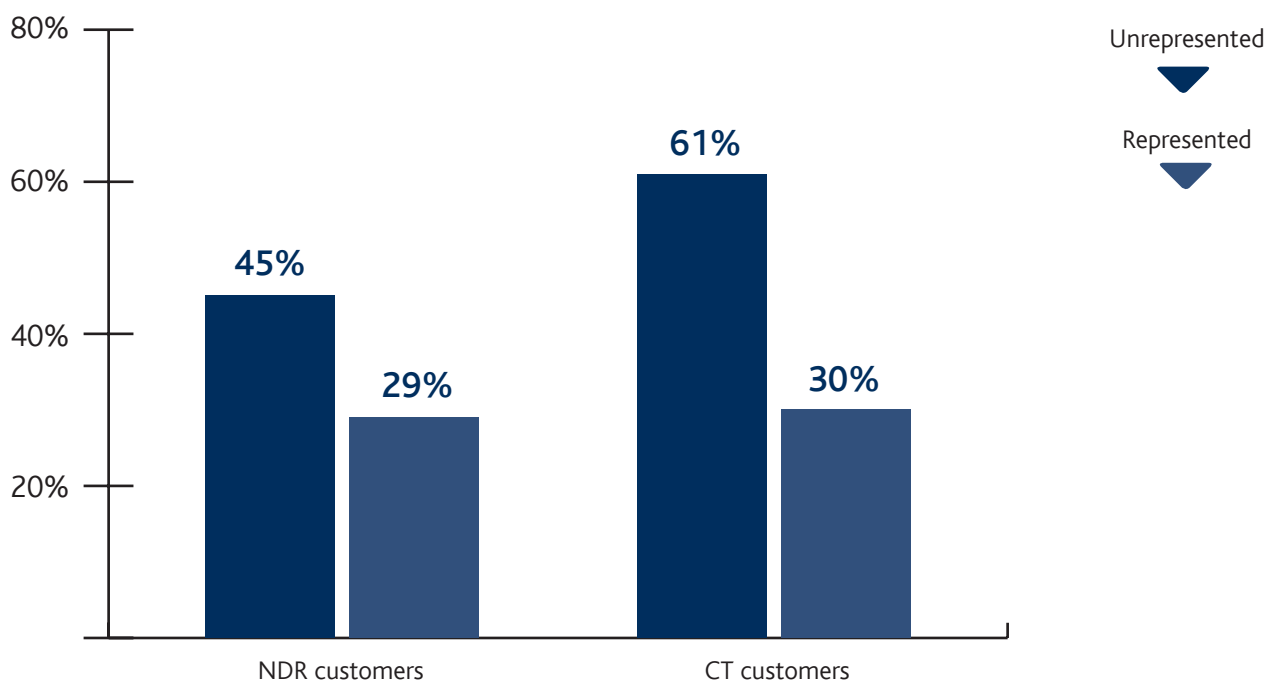
However, customers also experienced problems in these areas. The most common customer complaint was the outcome of the appeal (30% of those who had a problematic experience mentioned this), while others commented on staff not being sufficiently helpful or explaining things poorly (28%).

“When I received the final verdict I felt that the reasons were not fully enough to really explain why the decision had been made. It was not made clear enough. They also didn’t really respond to the reasons that I had put forward, as to why my band should not be changed.”

1.2.6. Understanding the process

Unrepresented CT customers were more likely than unrepresented NDR customers (Figure 1.9) to agree that the appeal process was easy to understand (61% compared with 45%). Sixty-one per cent of unrepresented CT customers said that the appeal process is easy to understand – while 29 per cent said that it was not. Represented customers had a less favourable experience – only 30 per cent said they found the appeals process easy to understand, while 38 per cent said they did not.

Figure 1.9: Extent to which appeal process is easy to understand, NDR and CT customers, 2013/14



Sample: 2,021 unrepresented and 806 represented NDR customers (2013/14); 1258 unrepresented and 541 represented CT customers (2013/14).

Question: 'Can you tell me whether you agree or disagree with each of the following statements? ... The appeals process was easy to understand'

2. Customers' communication with VOA



This section provides an overview of the customers' communication with the VOA prior and during the appeal; their views of the information received from VOA at different stages in the appeal process; their use of the available communication channels; and their preferred channels of communication for future dealings with VOA.

2.1 NDR

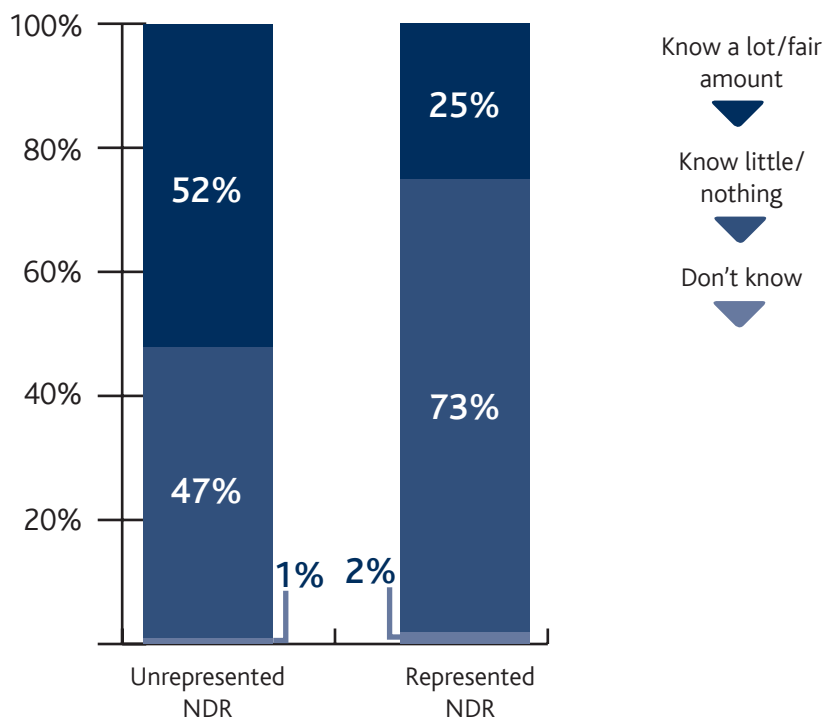
2.1.1. Customers' knowledge before and after the appeal

Most NDR appellants had little or no previous experience in making an appeal, therefore their initial level of knowledge (about valuation, the appeal process and the VOA in general) was limited. Prior to the appeal, only 21 per cent of unrepresented NDR customers said they knew a lot or a fair amount about how properties were valued; similar proportions reported they knew a lot or a fair amount about the appeal process (18%) and the VOA (19%). There were no significant changes in these figures since 2012/13.

After going through the appeal process, the proportion of unrepresented NDR customers who felt they knew a lot or a fair amount about property valuation increased to 52 per cent. This proportion is not significantly different from 2012/13 figure (50%).

A much smaller proportion of the represented NDR customers (25%) felt they knew a lot or a fair amount about property valuation at the conclusion of their appeal (Figure 2.1).

Figure 2.1: Levels of awareness about property valuation after appeal, unrepresented and represented NDR, 2013/14



Sample: 2,021 unrepresented and 806 represented NDR customers, 2013/14.

Question: 'How much, if anything, do you feel you now know about how non-domestic and business properties in England and Wales are valued by the VOA?'

At the start of their appeals, unrepresented CT customers were more knowledgeable than unrepresented NDR customers, about how properties are valued (25% compared with 21%), but there was no difference in the level of knowledge after going through the appeal process.

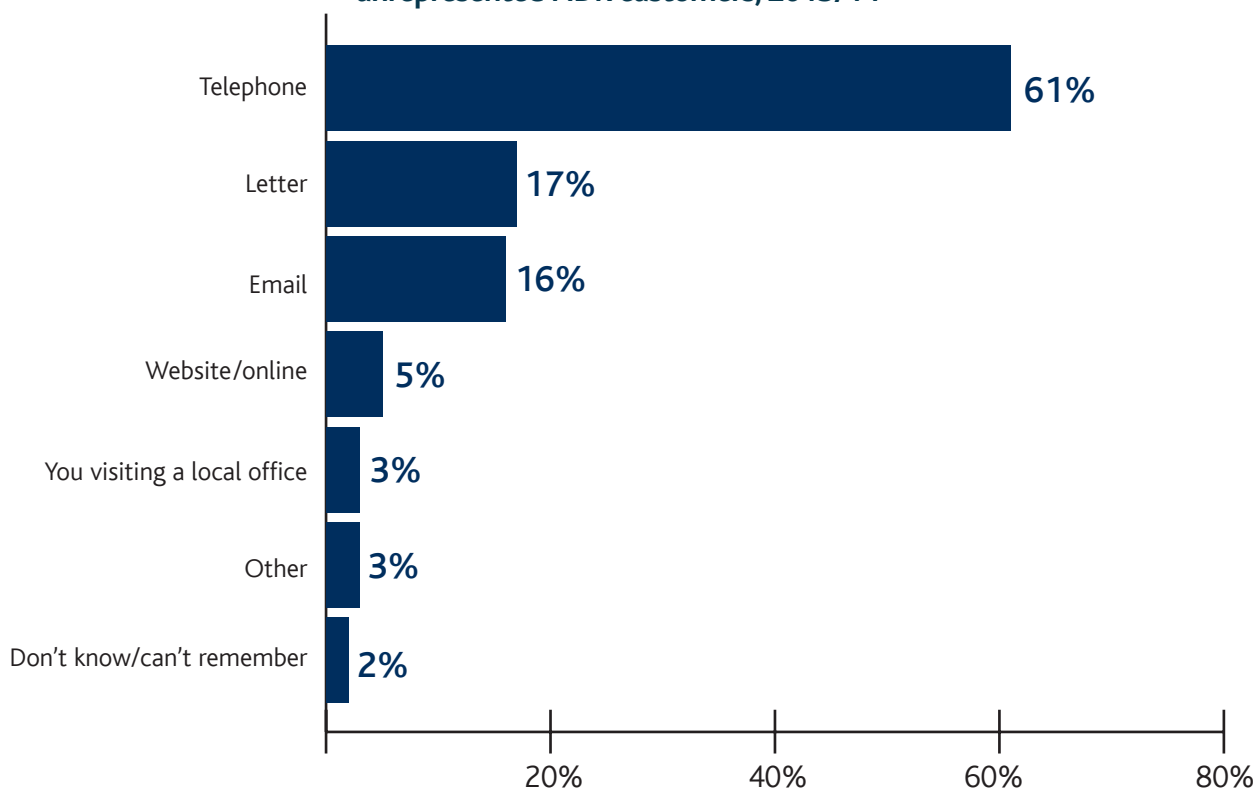
Appellants who had been in more frequent contact with the VOA were also more likely to feel knowledgeable at the end of the appeal process. Among unrepresented NDR customers, 64 per cent of those who had been in contact between two or four times a month felt knowledgeable (i.e., knew a lot/fair amount) about valuation compared to 45 per cent of those who had been in contact less than once every two months.

While 45 per cent of unrepresented NDR customers who went through the appeal process agreed that the process is easy to understand, the same proportion (45%) disagreed.

2.1.2 Initial contact with VOA

The majority of unrepresented NDR appellants (61%) made the initial contact with VOA by telephone (Figure 2.2). The proportion of unrepresented NDR appellants who made the initial contact by telephone has increased from 56 to 61 per cent between 2012/13 and 2013/14, with no other significant changes observed on this measure during the period.

Figure 2.2: Channels used to establish initial contact with VOA, unrepresented NDR customers, 2013/14



Sample: All respondents who had direct contact with the VOA 2013/2014 (1,829)

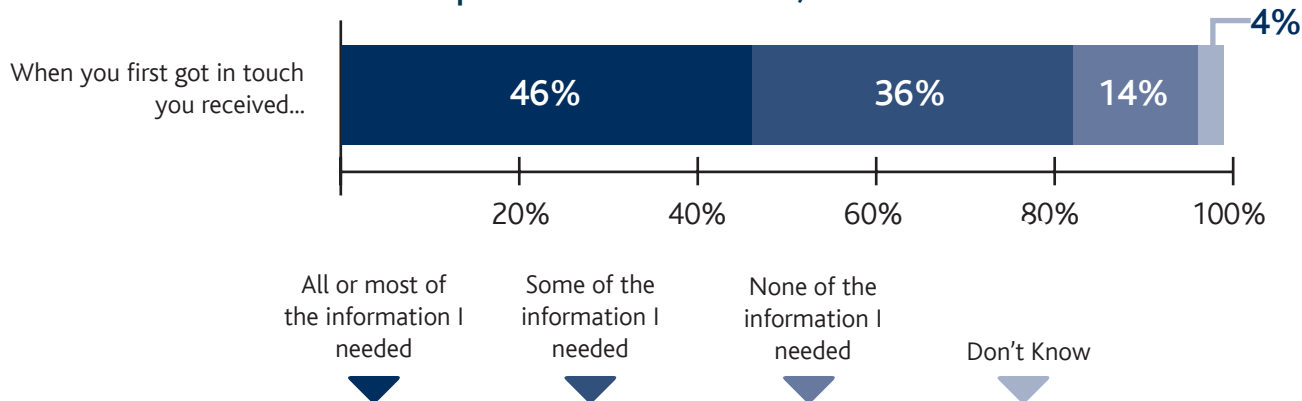
Question: 'How did you first get in contact with the VOA?'

Initial telephone contact was particularly common among unrepresented NDR customers with lower levels of knowledge. Two-thirds of those who knew little or nothing about property valuation before their appeal made an initial telephone contact, compared with 44 per cent of those who knew a lot or a fair amount about it. By contrast, initial contact by email was more likely to be used by unrepresented customers (both CT and NDR) who felt they knew at least a fair amount about property valuation.

Organisations with 10 or more employees were more likely to make the initial contact by email compared to micro-enterprises (22% of those with 10 or more staff, compared with 15% of those with fewer than 10 staff).

Customers were asked whether they received enough information during their initial contact, particularly about how VOA will reach a decision on their appeal. Just under half of the unrepresented NDR customers (46%) said they received all or most of the information they needed during the initial contact with VOA (Figure 2.3). A similar proportion (50%) felt they received only some or none of the information they needed (this figure is unchanged since 2012/13).

Figure 2.3: Information received during first contact, unrepresented NDR customers, 2013/14



Sample: Unrepresented NDR respondents who had direct contact with the VOA 2013/14 (1,830)

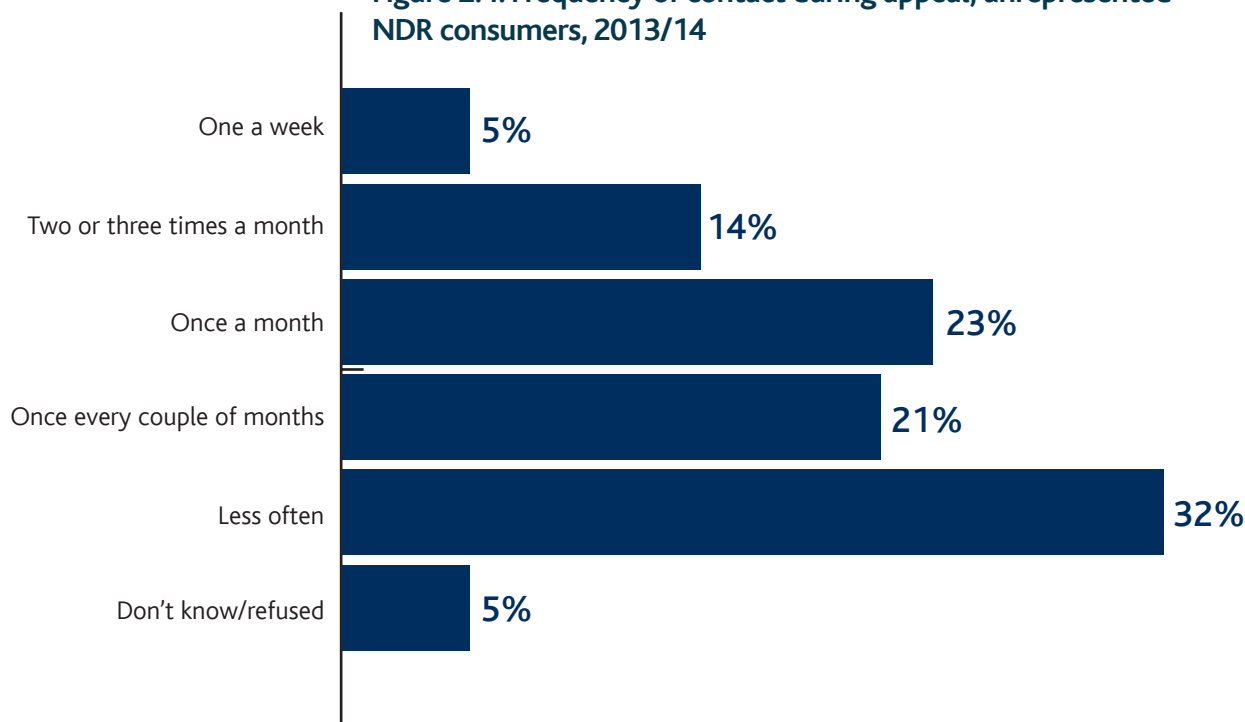
Unrepresented NDR customers were more likely to agree than to disagree that, at their first contact, the VOA made clear both the next steps in the process (64% agree and 27% disagree) and what information customers needed to provide (62% and 28% disagree). This is unchanged since 2012/13.

The unrepresented NDR customers who made the initial contact by email were more likely to say they got all or most of the information they needed on first contact (53% compared with 46% overall). It is worth noting that people contacting VOA by email already had higher initial levels of knowledge about property valuation and appeal processes (compared with customers who approached VOA through other means).

2.1.3 Contact with VOA during appeal and use of websites

The majority of unrepresented NDR (91%) customers had direct contact with the VOA during the appeal; 42 per cent of these had contact at least once a month (Figure 2.4). The level of direct contact in the unrepresented NDR group has increased from 87 per cent reported in 2012/13.

Figure 2.4: Frequency of contact during appeal, unrepresented NDR consumers, 2013/14



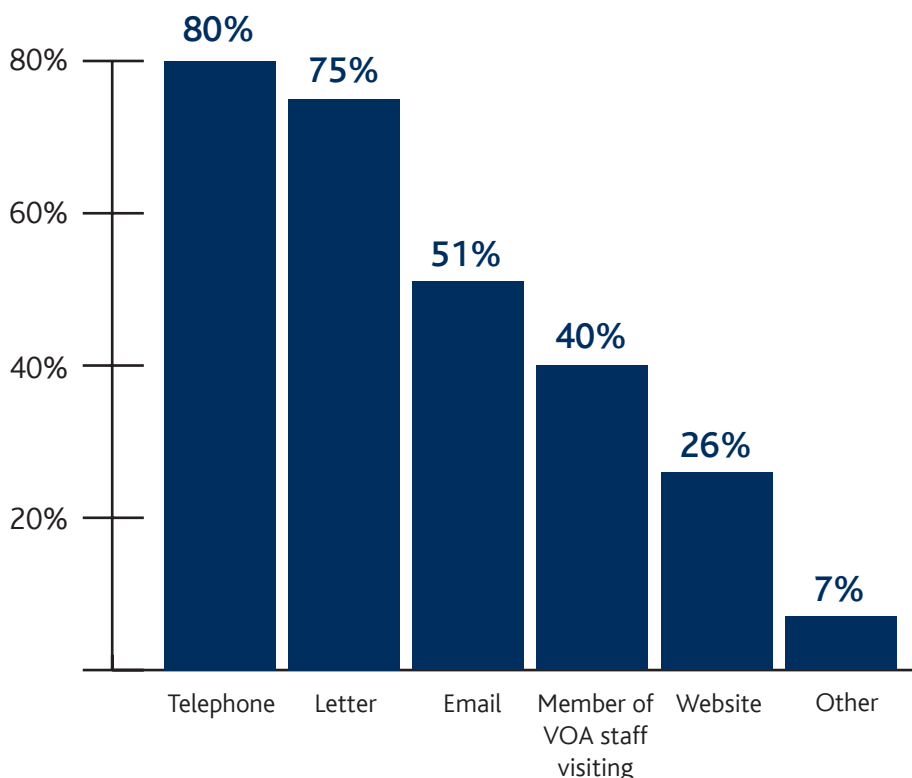
Sample: Unrepresented NDR respondents who had direct contact with the VOA (1,829);

Question: 'How often did you have contact with the VOA during your appeal?'

Represented NDR customers were significantly less likely than unrepresented NDR customers to have direct contact with the VOA (39% of represented customers versus 91% of unrepresented customers). The communication between these customers and VOA is often mediated by agents. One in four represented NDR customers (26%) said that they had contact with their agent one to four times a month during the appeal; 35 per cent had contact once every two to four months, while the remainder had contact less often than every four months (35%) or did not know the answer (4%).

During the course of their appeal, the majority of unrepresented NDR customers had contact with the VOA, most commonly by telephone (80%), letter (75%) and email (51%) (Figure 2.5). Two in five (40%) said that they had a personal visit from a member of VOA staff, although this figure is higher (55%) if respondents are included who - in a separate question - said that they had a property inspection. A quarter (26%) used a website to make contact during the appeal. The findings are similar to those seen in 2012/13, although there have been increases in the use of email (from 47% to 51%) and of a website (from 22% to 26%) to communicate with VOA.

Figure 2.5: Means of communication with VOA during appeal, unrepresented NDR customers, 2013/14



Sample: unrepresented NDR respondents who had direct contact with the VOA 2013/14 (1,829);

Question: 'During the appeal, which, if any, of the following methods did you have contact with the VOA?'

Organisations with 10 or more employees were more likely than micro-enterprises to use email in their communication with VOA (67% of organisations with 10 or more employees compared with 47% of those with fewer than 10 employees). Contact via email was also more prevalent among properties with a higher RV (66% of those with a RV higher than £25,000). By contrast, contact by letter was more common in cases where the RV was lower (79% of those with a RV of up to £12,000).

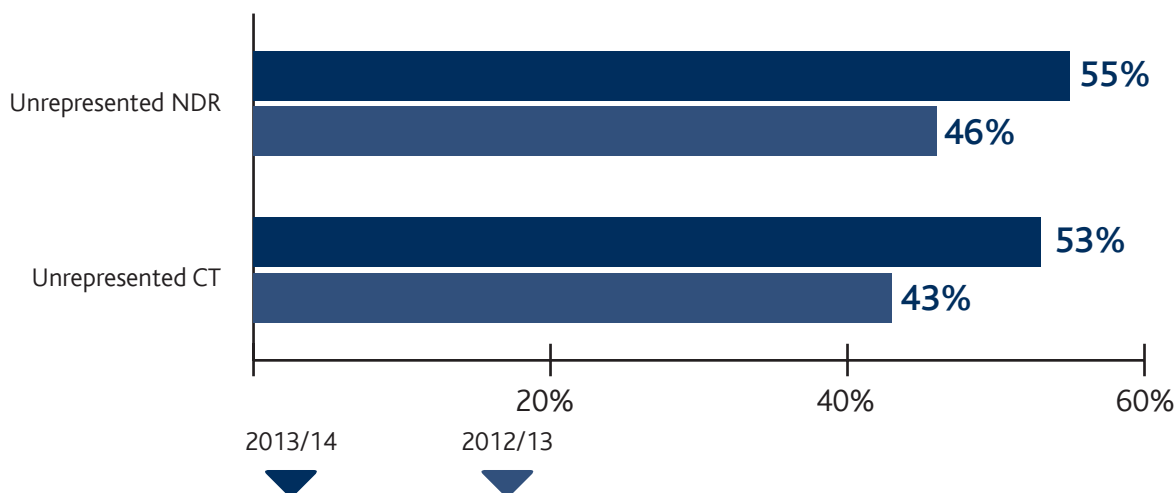
Customers were generally positive about their written communication with the VOA. Three in five unrepresented NDR customers (62%) agreed that the advice and information provided in this way was easy to understand, similar to 2012/13 figures.

There was also an increase in the proportion of unrepresented customers who used a website to get information about rateable values prior to launching the appeal. Among unrepresented NDR customers, 64 per cent used a website for information purposes compared to 55 per cent in 2012/13. Those NDR customers with a higher level of knowledge about property valuation were more likely to use websites (and in particular the VOA website) for gathering relevant information.

The VOA website was the most visited site by unrepresented NDR and CT customers (55% and 53% respectively) (Figure 2.6). This is an increase from 2012/13 figures.

Other websites that unrepresented NDR customers commonly use include GOV.UK (32%), Directgov (20%) and local council websites (27%).

Figure 2.6: Use of VOA website, unrepresented NDR and CT customers, 2012/13 - 2013/14



Sample: Unrepresented NDR respondents 2013/14 (2,021); 2012/13 (2,027); unrepresented CT respondents 2013/2013 (1,258); 2012/13 (1,255)

Question: Did you visit any of the following websites to get information about council tax banding, prior to starting or during your appeal? Options: VOA website...'

Customers who did not find all the information they needed on the VOA website were asked what information they would have liked. The most common responses from unrepresented NDR customers indicate a need for more information on how the VOA calculates RV, the appeal process and criteria taken into account when valuing properties.

Among represented NDR customers, a much lower proportion consulted a website to gather information about rateable values (25%). From all represented NDR customers, 20 per cent visited the VOA website, 11 per cent GOV.UK, 10 per cent a local council website and 7 per cent the Directgov website.

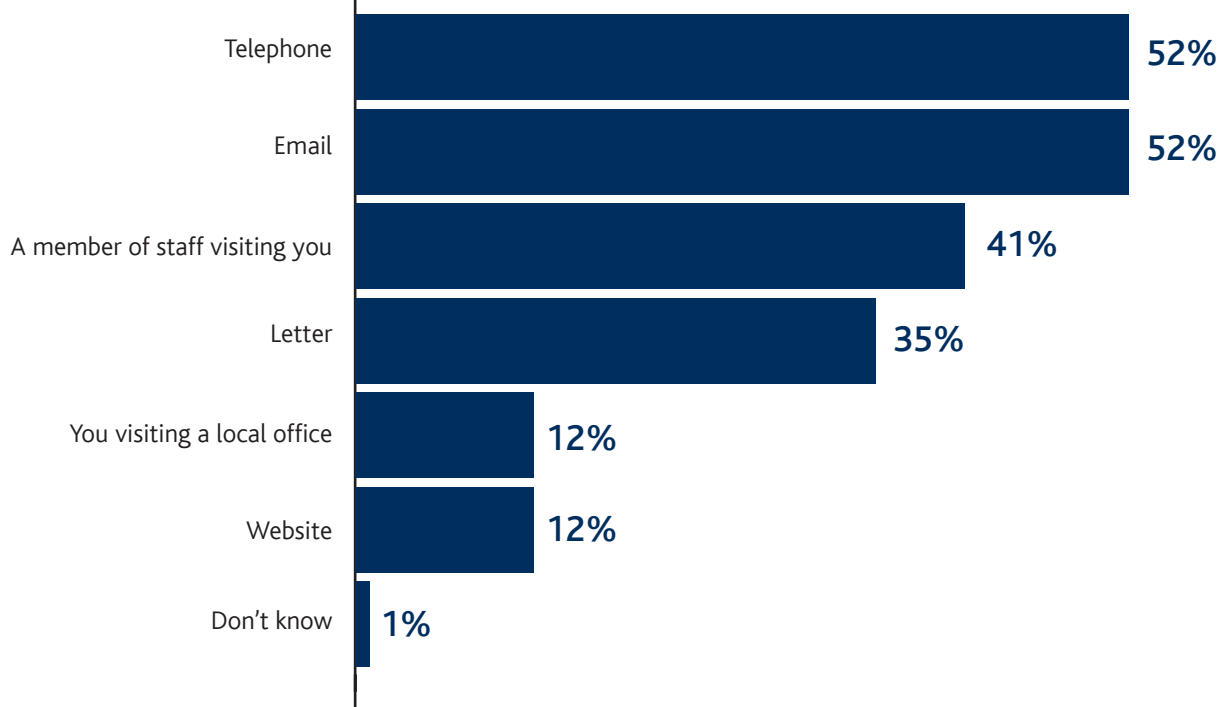
Larger businesses in the unrepresented NDR group used websites to a greater extent (73% of those with 10 or more employees compared with 63% of those with fewer than 10 employees).

2.1.4 Preferred channels of communication for future dealings with VOA

Unrepresented NDR customers expressed a preference for telephone (52%) and email (52%) as main channels of communication for any future dealings with the VOA. These were followed by visit from VOA

staff (41%) and letter (35%) (Figure 2.7). These figures are similar to last year’s survey, with the exception of the significant increase in the proportion of unrepresented NDR customers who want a personal visit from a member of the VOA staff (41% in 2013/14 compared to 35% in 2012/13).

Figure 2.7: Preferred channels for future communication with the VOA, unrepresented NDR customers, 2012/13-2013/14



Sample: Unrepresented NDR customers who had direct contact with the VOA 2013/14 (1,829);

Question: Through which of the following methods would you prefer to have contact in any future dealings with the VOA?

Unrepresented NDR customers can differ in their communication preferences by size and sector of business. Three in five organisations with 10 or more employees (61%) prefer to communicate with VOA via email in the future. Customers involved in appeals related to a restaurant, cafe, pub or hotel are more likely to prefer contact by letter (42% compared with 35% overall).

In addition, NDR customers whose overall experience with the VOA was poor tend to prefer face-to-face contact for any future communication with VOA (47% prefer receiving a visit from a staff member; and 16% wish to visit a local VOA office in future).

2.2 CT

2.2.1. Customers’ knowledge before and after the appeal

Similar to NDR customers, the initial level of awareness about the VOA appeal process and property valuation was low among unrepresented CT customers in 2013/14. Before initiating the appeal process, the vast majority of this group (83%) said they knew little

or nothing about the appeal process. Nearly three-quarters (74%) reported they knew little or nothing about the way properties were valued by the VOA. These figures have not changed since 2012/13.

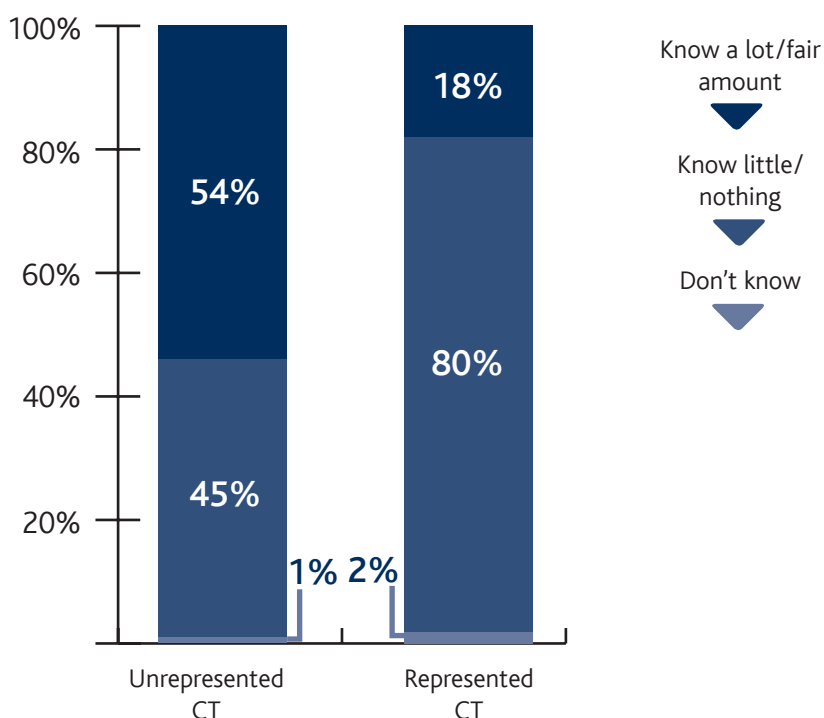
Among unrepresented CT appellants, the initial knowledge was higher for those who had visited a website for information about council tax banding, either prior to or during their appeal. For example, 28 per cent of those that visited a website said they knew a lot or a fair amount about how properties are valued, compared with 15 per cent of those that had not used a website. This suggests that websites may be an important information source at the initial stage of the appeal process.

In addition, initial knowledge was higher among those who made formal appeals where 28 per cent knew a lot or a fair amount about how properties are valued, compared to those who made informal challenges (21%).

Levels of awareness tend to improve by the end of the appeal. More than half of the unrepresented CT customers (54%) who completed the process felt they knew a lot (or a fair amount) about property valuation. This proportion was not significantly different in 2012/13 (51%).

In contrast, only 18 per cent of the represented CT customers who completed their appeal felt that they knew a lot (or a fair amount) about property valuation after the appeal. The vast majority of this group (80%) still felt they knew little or nothing about the valuation of properties at the end of their appeal (Figure 2.8).

Figure 2.8: Level of awareness about property valuation following appeal, unrepresented and represented CT, 2013/14



Sample: Unrepresented CT customers 2013/14 (1258); represented CT customers 2013/14 (541).

Question: 'How much, if anything, do you feel you now know about how non-domestic and business properties in England and Wales are valued by the VOA?'

Unrepresented CT appellants who had been in more frequent and direct contact with the VOA were more likely to feel knowledgeable at the end of the appeal. Sixty per cent of unrepresented CT customers who had been in contact one in four times a month with VOA felt knowledgeable about property valuation; this proportion decreases to 44 per cent of those who had been in contact less than once every four months.

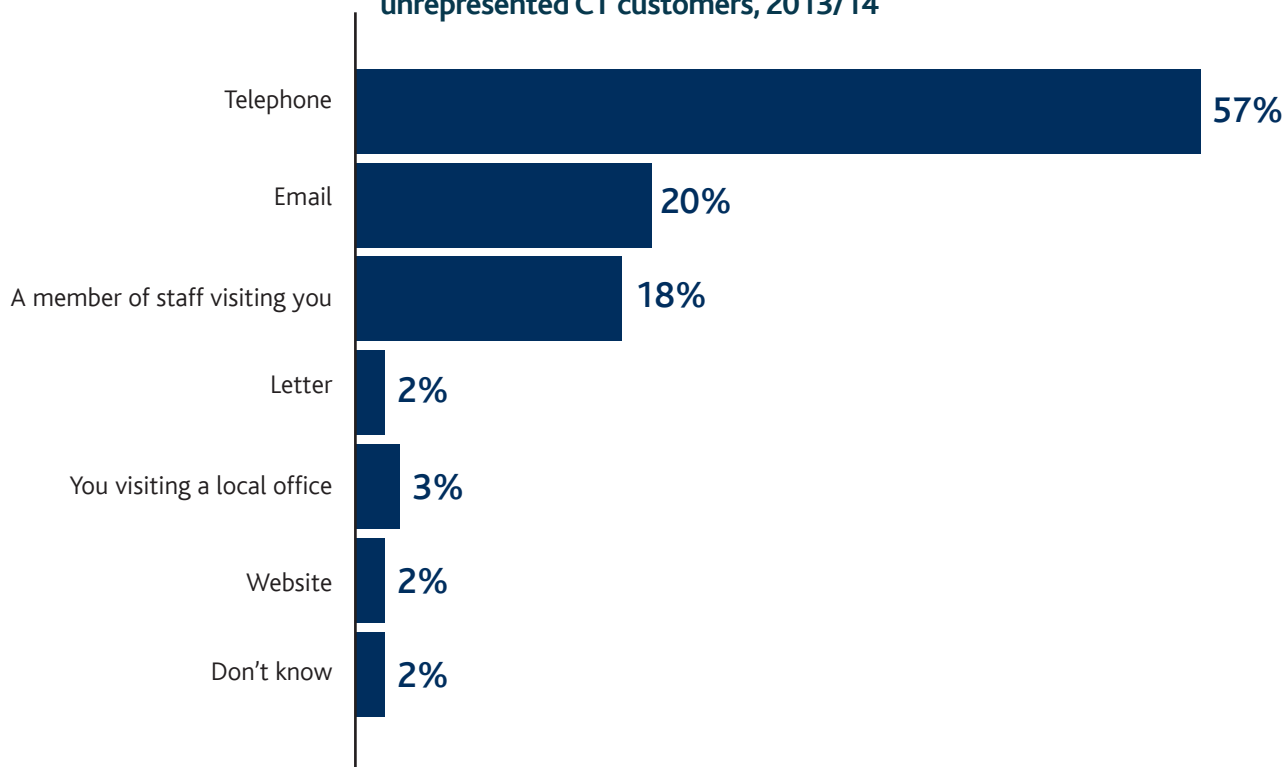
Unrepresented CT customers were more likely than unrepresented NDR customers to agree that the appeal process was easy to understand (61% compared with 45%). Only 30 per cent of represented CT customers agreed with this statement (38% disagreed and the remainder did not know the answer).

2.2.2 Initial contact with VOA

The majority of unrepresented CT appellants (57%) made the initial contact with VOA by telephone (Figure 2.9). This represents a fall from 61 per cent reported in 2012/13.

There were no significant differences between unrepresented NDR and CT customers in the use of the other contact channels.

Figure 2.9: Channels used to establish initial contact with VOA, unrepresented CT customers, 2013/14



Sample: All unrepresented CT customers who made direct contact with the VOA 2013/14 (1,200)

Question: 'How did you first get in contact with the VOA?'

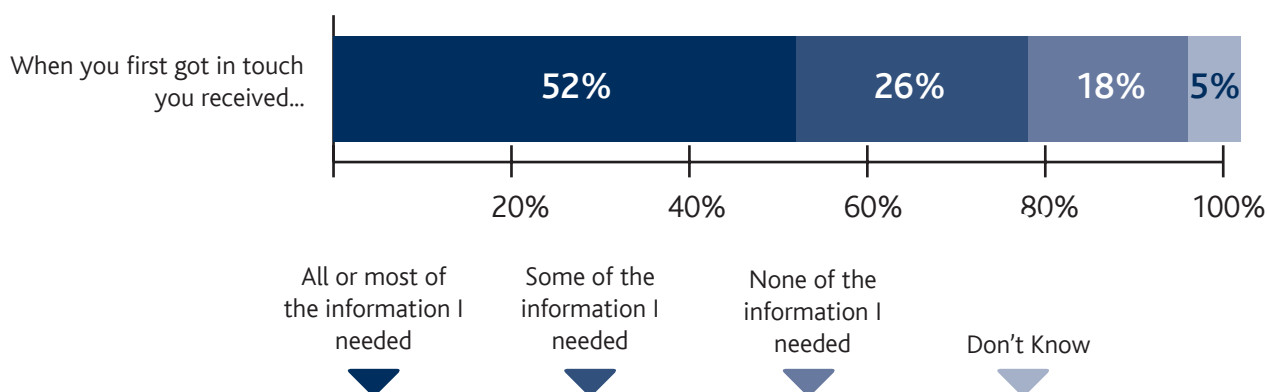
Initial telephone contact was particularly common among unrepresented CT customers with lower levels of knowledge. Three in five (60%) of those who knew little or nothing about property

valuation made the initial contact via phone, compared with 50 per cent of those who knew a lot or a fair amount.

There are also demographic differences in the choice of the contact channel. Older CT respondents were more likely to make initial contact by letter (27% of those aged 65 or over, compared with 17% of those aged under 65) and were less likely to use email (8% compared with 21%). There were also variations over the course of the survey year in 2013/14. Initial contact by telephone was higher in quarter 3 (60%) and quarter 4 (63%) than in quarter 1 (50%) or quarter 2 (54%).⁸ By contrast, initial contact by email was higher in quarter 1 (21%) and quarter 2 (22%) than in quarter 3 (13%) or quarter 4 (14%). This can be partly attributed to quarterly changes in the demographic profile of unrepresented CT customers between quarters, albeit it does not account for all differences.

Unrepresented CT customers were also asked whether they received enough information during their initial contact, particularly about how VOA will reach a decision on their appeal. Around half (52%) of them said they received all or most of the information they needed, but 43 per cent felt they received only some or none of the information they needed (Figure 2.10). Figures were not significantly different in 2012/13.

Figure 2.10: Information received during first contact, unrepresented CT customers, 2013/14



Sample: Unrepresented CT respondents who had direct contact with the VOA 2013/14 (1,200);

The choice of the communication channel reflects the demographic profile of the customers. Older unrepresented CT customers were more likely to make initial contact by letter and less likely to use email. Those aged 65 or over were also less likely to say they got all or most of the information they needed (40%) than those aged 50-64 (51%) and those aged under 50 (59%).

For unrepresented CT customers, 71 per cent agreed that, at their first contact, the VOA made clear the next steps in the process and 64 per cent agreed that VOA made clear what information they needed to provide. On balance, unrepresented CT customers were more positive than unrepresented NDR customers about the information they received at first contact. They were more likely to

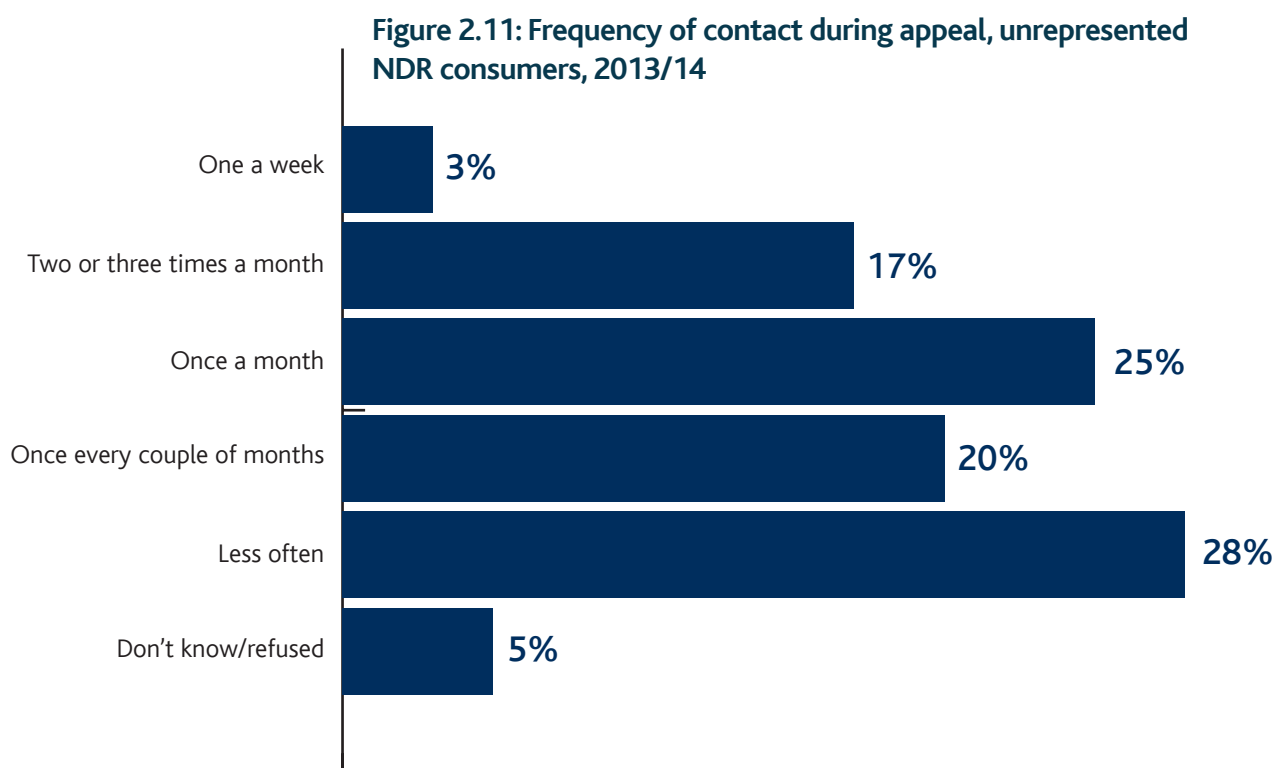
⁸ Quarter 2 figure (54%) is not statistically significant from the figure reported in quarter 3 (60%).

say that they got all or most of the information they needed (52% compared with 46%), and more likely to say that the VOA made the next steps clear to them (71% compared with 64%).

When interpreting these findings, due attention must be paid to the fact that perceptions of the initial contact can be affected by customers’ recall bias and the decision on their appeal. For example, customers were more likely to say that they got all or most of the information they needed at their first contact, if they received a favourable outcome to their appeal.

2.2.3. Contact with VOA during appeal and use of websites

Virtually all unrepresented CT customers had direct contact with VOA during the appeal (96%); of these, 46 per cent had contact at least once a month (Figure 2.11).



Sample: unrepresented CT respondents who had direct contact with the VOA (1200)

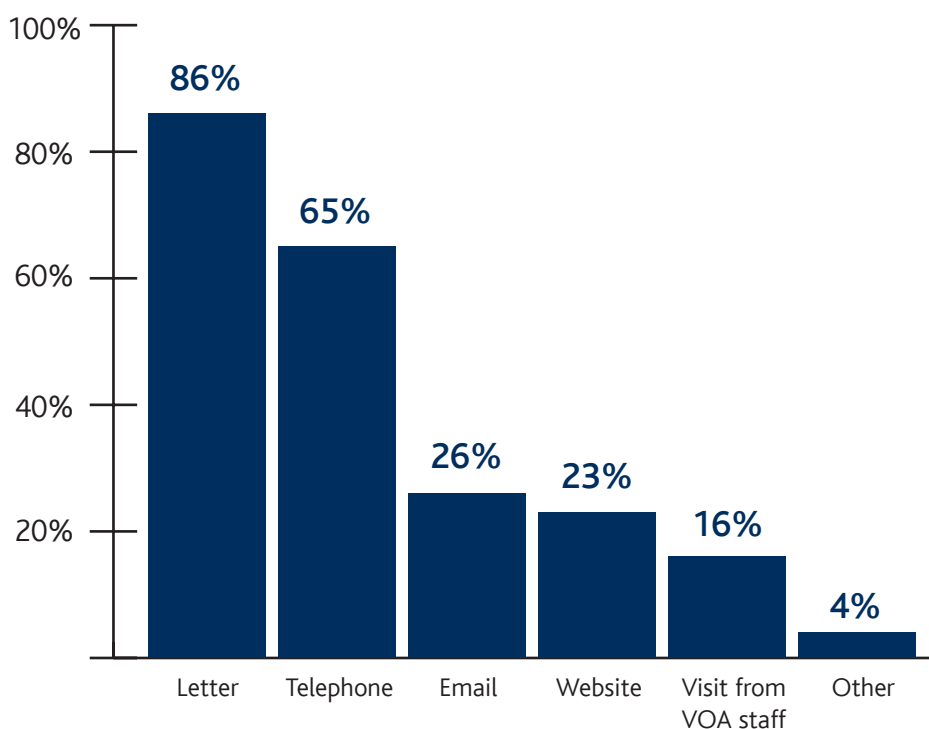
Question: 'How often did you have contact with the VOA during your appeal?'

Represented CT customers were significantly less likely to have direct contact with the VOA (18%). The communication between represented customers and VOA is primarily mediated by agents. Almost half of represented CT customers (46%) said that they only had contact with the agent once at the beginning of the appeal process, with only 14 per cent having regular contact with their agent (once a month or more during the appeal).

The majority of unrepresented CT appellants had contact with the VOA by letter (86%); telephone contact was also common with 65 per cent using this means of communication at some point during

the process (Figure 2.12). A quarter (26%) used email and a similar proportion (23%) used a website to make contact during the appeal. One in six (16%) said that they had a personal visit from a member of VOA staff, although in a separate question more (21%) said that they had a property inspection. Three percent visited a local VOA office. The findings are generally similar to those reported in 2012/13, although there have been increases in the use of a website to make contact (from 14% to 23%), and in the proportion receiving a personal visit from VOA staff (from 12% to 16%).

Figure 2.12: Means of communication with VOA during appeal, unrepresented CT customers, 2013/14



Sample: Unrepresented CT respondents who had direct contact with the VOA (1200)

Question: 'during the appeal, which, if any, of the following methods did you have contact with the VOA?'

The use of email was higher among those with a property in the council tax bands G or H (38%), while use of the telephone was highest among those with a property in bands A or B (74%). Older customers (aged 65 or over) were less likely to use email (16%) during the course of their appeals.

During the appeal, around a quarter of unrepresented CT appellants (23%) made contact with the VOA via the website, an increase from 2012/13 figures (14%).

There was an increase in the proportion of unrepresented CT customers who used a website to get information about CT band prior to launching the appeal (from 63% in 2012/13 to 70% in

2013/14). The VOA website was the most popular website, with 53% of this group having consulted this online source. This is an increase from 43 per cent reported in 2012/13. Other websites that unrepresented CT customers commonly use include local council websites (42%), GOV.UK (37%) and Directgov (25%).

In the group of unrepresented CT customers, use of websites also increases by tax banding, with those in band G or H significantly more likely to use websites for information purposes than those in band A or B (83% compared to 60%).

Among represented customers, a much lower proportion consulted a website to gather information about rateable values (22% of the represented CT customers). From all represented CT customers, 12 per cent visited the VOA website, 10 per cent a local council website, and 8 per cent used one of GOV.UK, Directgov or Business Link websites.

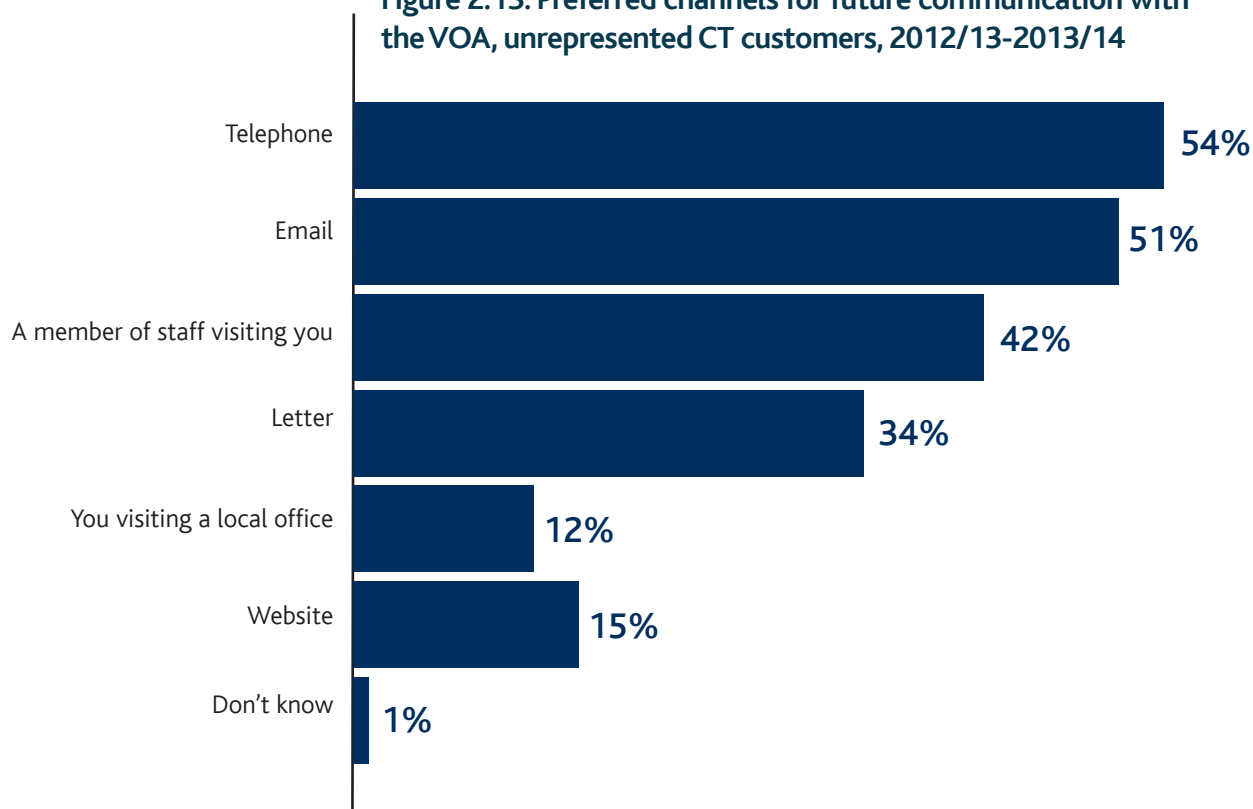
Appellants who used the VOA website were more likely to say that they got all of the information they needed than those who used other popular websites such as GOV.UK. For example, 30 per cent of the unrepresented CT customers who consulted VOA website reported that they got all the relevant information compared to 26 per cent of those unrepresented CT customers who used GOV.UK, 24 per cent who used Directgov and 25 per cent who used a council website.

There are additional factors that influence the use of websites by customers. For example, from those unrepresented CT customers who did not visit a website, two in five (40%) stated that this was due to not owning or having the knowledge to use a computer. This is related to the age profile of this group: 58 per cent are aged 50 or older; and 24 per cent aged 65 or older. Represented CT customers gave similar reasons for not visiting a website to get information.

2.2.4 Preferred channels of communication for future dealings with VOA

The majority of unrepresented CT customers wish to communicate with VOA via telephone (54%) and letter (51%) in the future (Figure 2.13). Other preferred channels of communication include email (42%) and a visit from a member of staff (34%). Most figures show an increase from last year's survey, indicating that CT appellants are keener to have future contact with VOA through multiple channels.

Figure 2.13: Preferred channels for future communication with the VOA, unrepresented CT customers, 2012/13-2013/14



Sample: Unrepresented CT respondents who had direct contact with the VOA 2013/14 (1,200);

Question: Through which of the following methods would you prefer to have contact in any future dealings with the VOA?

There is a gap between how customers wish to communicate in the future and what they have used in their recent communication with VOA. Although 51 per cent unrepresented CT appellants prefer contact by letter in the future, this was lower than the proportion currently using this channel (86%). By contrast, a significantly higher proportion would like to use email in future than actually used it in their latest appeal (42% compared with 26%). In a similar vein, the proportion of those who prefer face-to-face contact - either involving a member of VOA staff visiting the customer (34%) or the customer visiting a local VOA office (12%) - was also significantly higher than the proportion who used these channels in their latest appeal (16% and 3%, respectively). Overall, this indicates a desire for greater email and face-to-face contact, and for a reduction in contact by letter.

Unrepresented CT customers show differences in their communication preferences. Customers with properties in either council tax bands A or B showed a preference for telephone contact (65%), followed by receiving a letter (50%) or a visit from VOA staff (43%). By contrast, those with a property in band G or H prefer contact via email (56%). Contact via email was more popular among younger appellants (56% of those aged under 50), whereas a preference for personal contact was more prevalent among older people aged 65 or over (44% prefer a visit from a member of VOA staff).

While the findings indicate a preference for personal visits among unrepresented CT customers, this preference often came from people who received an unfavourable outcome to their recent appeal but did not receive a personal visit. For many appellants, this preference therefore seems to reflect dissatisfaction with the appeal outcome as well as a preference for this contact channel over other channels.

3. Our Customers



This section describes the profile of the CT and NDR appellants, including their socio-demographic and business characteristics as well as details of the properties appealed.

3.1. NDR

3.1.1. Demographics

NDR respondents were primarily male (69% of unrepresented and 71% of represented customers) and of working age (86% of unrepresented and 87% of represented customers).

Table 3.1: Age and gender profile, unrepresented and represented NDR customers, 2013/14

	Unrepresented NDR customers (%)	Represented NDR customers (%)
Age		
16-49	48	48
50-64	38	39
65+	11	9
Gender		
Male	69	71
Female	31	29

Sample: All unrepresented NDR respondents 2013/14 (2,021); all represented NDR respondents 2013/2013 (806)

3.1.2. Business Details

In the unrepresented NDR group, the majority of appeals come from micro-enterprises (73% had fewer than 10 staff, and a further 16% had between 10 and 49 staff). Among the represented NDR customers, 55 per cent of the appeals came from businesses with fewer than 10 staff.⁹

The majority of businesses (60%) of unrepresented NDR customers¹⁰ have been operating for more than five years. Thirty-two per cent have been operating for less than five years, with the remaining 8 per cent having ceased to operate or not answering the question.

Properties being appealed by unrepresented¹¹ customers were most commonly shops or other retail premises (32%), restaurants/bars/hotels (21%), and work premises such as offices (15%) (Table 3.2).

⁹ This is not necessarily an accurate reflection of the NDR caseload, in particular the represented NDR customers, as this survey excludes large businesses. This exclusion is made with a view to conducting separate research with this group.

¹⁰ Question not asked of represented customers

¹¹ Question not asked of represented customers

Table 3.2: Business and property characteristics, unrepresented and represented NDR customers, 2013/14		
	Unrepresented NDR customers (%)	Represented NDR customers (%)
How many people does your organisation currently employ either full or part time at all its locations?		
Micro (1-9 employees)	73	55
Small (10-49 employees)	16	31
Medium (50-249 employees)	3	6
Large (250+ employees)	3	3
Don't know/ refused	5	2
Is the property you appealed the rateable value about...?		
A shop or other retail premises	32	n/a
A restaurant/café/pub/bar or hotel	21	n/a
A manufacturing premises	4	n/a
Agricultural/industrial property/land	12	n/a
Personal services	8	n/a
Residential property (e.g. being re-classified)	5	n/a
Other work premises such as an office	15	n/a
Something else	2	n/a
Don't know/ refused	2	n/a

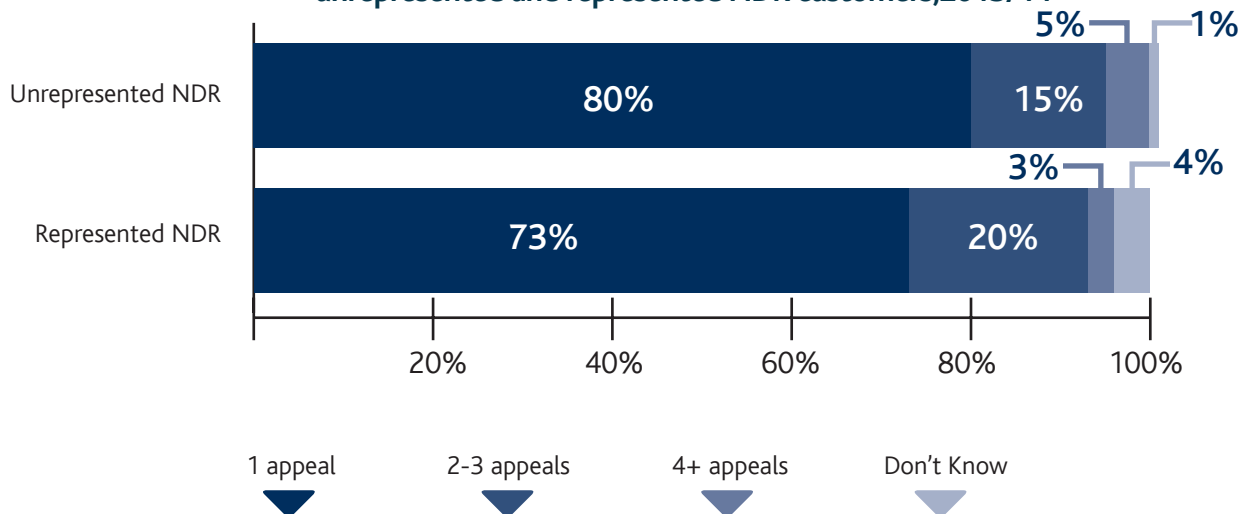
Sample: All unrepresented NDR respondents 2013/14 (2,021); All represented NDR respondents 2013/14 (806)

The majority of businesses owned or leased only one property (64% for unrepresented and 65% for represented NDR customers). A third of them owned or leased 2 or more properties (32% for unrepresented and 33% for represented NDR customers). Only a small minority of NDR appellants had 20 or more properties (5% for unrepresented and 4% for represented NDR customers, respectively).

3.1.3. Previous appeals and contact with agent

One in five unrepresented NDR customers (20%) said they had made more than one appeal to the VOA in the past two years, compared to 24 per cent of represented NDR customers (Figure 3.1).

Figure 3.1: Appeals to VOA made over last two years, unrepresented and represented NDR customers, 2013/14



Sample: All unrepresented NDR respondents (2,021); all represented NDR respondents (question asked Q3-4 only) (231)

Question: Unrepresented: As far as you recall, how many separate appeals to the VOA have you made in the last two years? / Represented: As far as you recall, how many separate appeals to the VOA have you made for any commercial properties in the last two years either directly to the VOA or through an agent?

For 70 per cent of both unrepresented and represented customers, this was the first time they had ever appealed against the RV of a particular property.

Three quarters of represented NDR customers (76%) also said that this was the first time that they had worked with that particular agent to make the appeal.

Although unrepresented customers, by definition, all carried out their appeals independently and without using agents, one in three (32%) were approached by an agent during the course of their appeal.

3.1.4. Case studies

Unrepresented NDR customer - middle-aged man appealing against the rateable value of his shop

- This customer appealed the RV of his shop knowing nothing about the VOA or how it values business properties. This was the only time he had made an appeal to the VOA in the past two years.
- He initiated contact with the VOA by telephone, and felt he got most of the information he needed at this point.
- The appeal took between 18-24 months to conclude, during which he recalls having contact with the VOA fairly regularly (around two or three times a month by his estimation). His appeal involved contact via a number of different channels, including a property visit.
- In the end his appeal was successful (the customer now has a lower rateable value) and while he understands fairly well why

the decision was made, he does not agree with it.

- Overall, he rates his experience as fairly poor, owing to a major complaint. The customer feels the VOA took far too long to sort out his case. He says that in the end, he accepted a lower offer as it was taking far too long for a tribunal to take place.
- He does not have strong views either way about how professional or knowledgeable staff at the VOA are, though he strongly feels that staff he dealt with were polite and friendly.

Represented NDR customer – a woman in her 40s, who used an agent to appeal the rate for a business property

- This customer decided to contact an agent to make the appeal on her behalf. She had previously unsuccessfully appealed a non-commercial property herself and wanted to see if the agent would be more successful. This was the first time she had worked with the agent to make the appeal.
- This customer agreed to pay the agent on a no win, no fee basis, including a percentage on any rebate/savings.
- She felt the agent gave her a great deal of information at the start of the process to explain how the appeal would work. Overall, she was very satisfied with the way her agent dealt with the appeal.
- Her appeal has successfully concluded, and she recalls the process took around 8 months. During this time, she had contact with her agent once every couple of months.
- Before her appeal, she visited the VOA website and a council website for more information, and feels these gave her some of what she needed. She would have liked more information on how to appeal a decision and make a formal complaint (although some of this is likely following on from her earlier appeal).

3.2. CT

3.2.1. Demographics

The profile of unrepresented CT customers is different from represented CT customers. Represented customers tended to be older (51% aged 65 and above, 17% aged under 50) compared to unrepresented customers (24% aged 65 and above, 41% aged under 50, respectively). Reflecting the differences in the age composition, represented CT customers were more likely to be retired (53% of represented customers compared to 29% of unrepresented customers) (Table 3.3).

Table 3.3: Age, gender and working profile of unrepresented and represented CT customers, 2013/14

	Unrepresented CT customers (%)	Unrepresented CT customers (%)
Age		
16-49	41	17
50-64	34	30
65+	24	51
Gender		
Male	52	59
Female	48	41
Work Status		
Working (full or part time)	64	42
Not working: retired	29	53
Other	6	5

Sample: All unrepresented CT respondents 2013/14 (1,224); All represented CT customers 2013/14 (541)

3.2.2. Type of appeal

The survey covers CT customers making formal and informal challenges. While over half (52%) of unrepresented CT customers made a formal appeal, only 19 per cent of represented customers had done the same (the remainder having made informal challenges).

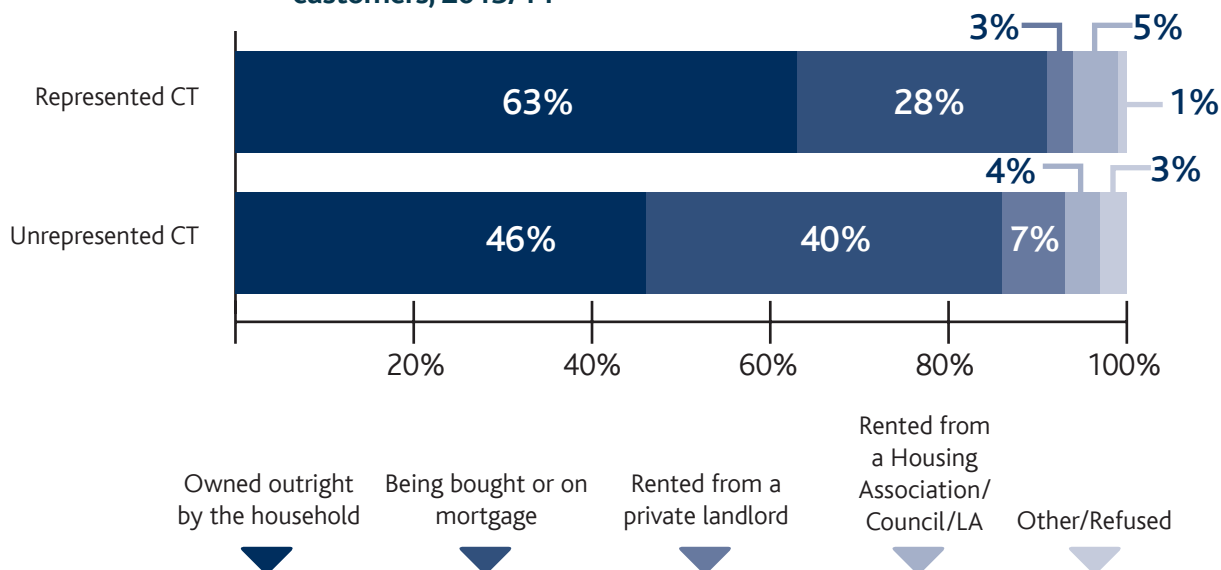
Compared with informal challengers, the unrepresented CT customers who carried out formal appeals were:

- less likely to appeal about the property they lived in (76% compared to 98% among informal challengers);
- more likely to have been approached by an agent (24% versus 2%);
- more likely to have a property inspection (35% versus 7%);
- and expressed a greater knowledge and understanding of the process (59% said they knew a lot or fair amount about how properties are valued by the end of the process, compared to 48% among informal challengers).

3.2.3. Property details

The majority of the unrepresented and represented CT appeals are related to properties that are owned by the appellant or bought on mortgage (86% and 91%, respectively). Only a minority of the properties appealed by CT customers are rented (about 11%).

Figure 3.2: Characteristics of the properties appealed by CT customers, 2013/14



Sample: 1,224 unrepresented CT respondents (2013/14); 541 represented CT respondents (2013/14)

Question: Is the property you appealed for...?

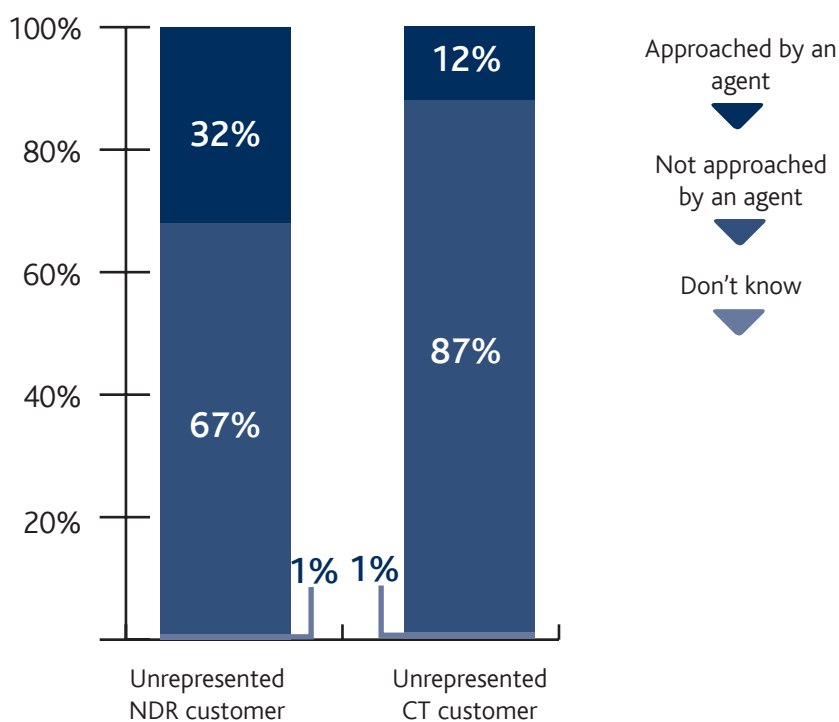
3.2.4. Previous appeals and contact with agent

The majority of unrepresented¹² CT customers (93%) submitted only one appeal to the VOA in the past two years; 6 per cent made two or more appeals. This pattern differs for unrepresented NDR customers, 20 per cent of whom had made previous claims in the past two years.

One in eight represented CT customers (12%) had made a previous appeal about the same property. Although unrepresented customers carried out their appeals independently (i.e., without using agents), 12 per cent were approached by an agent at some point in the process to handle their appeal. This is far less than the corresponding figure for unrepresented NDR customers (figure 3.3).

¹²This is not asked of represented customers.

Figure 3.3: Proportion of customers approached by an agent, unrepresented NDR and CT customers, 2013/14



Sample: Unrepresented NDR respondents (2,021); Unrepresented CT respondents (1,258)

Question: Did an agent approach you at any time to handle the appeal?

3.2.5. Case studies

Unrepresented CT customer - man in his 40s working full-time. He recently appealed against the CT banding of the property he lives in.

- This customer appealed his property's CT banding knowing nothing about the VOA, the appeal process, or the way in which properties are valued by the VOA.
- He initiated contact with the VOA by telephone, and felt he got most of the information he needed at this point.
- This customer visited a number of different websites (the VOA website, GOV.UK, DirectGov and a council website) to supplement his understanding, and feels that these sites collectively provided him with all of the information he needed.
- Overall, his appeal took around four months to conclude. During this time, he recalls having direct contact with the VOA once every couple of months, on average. He recalls communicating with the VOA by letter, telephone and email.
- His appeal also involved a visit to his property by an inspector, and he believes this visit contributed a great deal to the VOA resolving his appeal.
- Though his case was successful (he saw a decrease in his CT banding), he rates the service he received as fairly poor, owing to a few minor problems or issues he encountered. This customer believes the person he dealt with at the VOA made

decisions at the last moment and took too long to respond. He also feels the process could have taken less time overall and commented that the person he dealt with seemed busy dealing with other cases.

- This customer's views of staff at the VOA are mixed; he firmly believes that staff were knowledgeable, but also feels they tended to take too long to respond to his queries.

Represented CT customer - retired man who used an agent to appeal a property he owns outright.

- This customer found out that he could appeal his Council Tax banding when he was first approached by an agent.
- He decided to use the agent to make the appeal as he believed the agent would do a good job.
- He agreed to pay an upfront fee of £175 to the agent, which would not be refundable if the appeal was unsuccessful.
- At the time of the survey, it has been around five months since the appeal started and this customer is yet to receive a decision on the appeal from his agent or the VOA.
- This customer is dissatisfied with the way his agent has dealt with his appeal. There are a number of reasons he states for his dissatisfaction; he believes the agent has not kept him updated or responded to his queries. He also believes the agent has been slow / unresponsive and has not demonstrated his commitment or interest in his appeal.
- Though he has not had any direct contact with the VOA, he holds a positive view about them. He firmly trusts that the VOA would reach the right outcome. However, he also believes that his appeal to the VOA is more likely to be successful as it has been undertaken by an agent.