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GfK

ALTERNATIVE DISPUTE RESOLUTION RESEARCH

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Executive Summary

Background

- Ofcom (office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications, wireless communications services and postal services.
- As the communications regulator, Ofcom has a duty to set regulation for Communications Providers' (CPs) complaints handling procedures to ensure consumers do not experience harm and detriment. If a consumer complaint reaches deadlock, or a dispute is older than 8 weeks, the complaint can be referred to an Alternative Dispute Resolution (ADR) scheme. CPs must be signed up to one of the two accredited schemes: Ombudsman Services or CISAS.
- In recent years Ofcom has introduced a number of measures to improve the ADR process:
 - In 2010 the point at which consumers became eligible for ADR was reduced from 12 to 8 weeks.
 - In 2011 CPs were required to follow an Ofcom Code of Practice on Complaints Handling (General Condition 14) to promote awareness of ADR and to inform customers of their right to refer to ADR after 8 weeks.
- This report shows the results of a study on ADR awareness and usage among communications complainants who are eligible for referral to this scheme. The research reflects Eligible Complainants' views on their most recent or most progressed complaint with their provider in the last 12 months. The research was conducted from 18 February to 5 March 2013.

Findings

Eligible complainants are not always aware of their right to be referred to an ADR scheme:

- Around a quarter (27%) of communications complainants screened were eligible for referral to ADR¹. This was significantly more than were actually referred (4%).
- 30% of Eligible Complainants were aware of ADR. Awareness of ADR was lower among fixed broadband complainants (25%) and highest among pay TV complainants (37%).

Eligible Complainants rely on their Communications providers to inform them about ADR:

- 14% of Eligible Complainants recalled receiving written notification of their right to refer their complaint to an ADR scheme.
- Among complainants who went on to become ADR users the majority (79%) first heard about ADR through their service provider.

¹ An Eligible Complaint is defined as: A complaint that is unresolved for more than 8 weeks, or a complaints that has been unresolved for less 8 weeks but for which the complainant has received written notification of their right to apply to ADR or a Deadlock Letter. Eligibility refers to eligibility for ADR referral, not necessarily eligible for acceptance to an ADR scheme

- Eligible Complainants who were aware of ADR but did not use the scheme fell broadly into three groups:
 - those whose complaint was resolved by the CP,
 - those who preferred to give their provider a chance to resolve the complaint without ADR,
 - and those who felt that ADR was 'not worth the hassle'.

The complaint experience had a cost in time for complainants:

- 22% of complainants had to take time away from work to deal with their complaint and 8% had to take time away from carer commitments. Of those working, over a third were dealing with complaints during working hours, rising to 45% for those dealing with a Landline complaint.

Eligible Complainants' satisfaction with the outcome of the complaint was improved when the ADR scheme was used:

- 'Ease of resolving' complaints and 'time taken to resolve complaint' were key drivers of complaint satisfaction. 60% of Eligible Complainants were dissatisfied with the time taken to resolve their complaint and 57% were dissatisfied with the ease of resolving their complaint with their provider.
- ADR Users were more satisfied with the outcome of their complaint (47%) than all Eligible Complainants (29%).

Objectives and Methodology

Phase 1: Exploratory Omnibus Phase

Research Aims

To gauge the incidence in the UK population of ADR users and complainants whose complaints remain unresolved for 8 weeks or more, at which point they become eligible to be referred to ADR. To weight the data collected online to ensure data is representative of the general population

Methodology

- 1,055 interviews were undertaken on GfK's weekly nationally representative Random Location Omnibus survey between 22 November and 3 December. The fieldwork time was extended due to flooding causing delays to the start of fieldwork in some locations.
- Respondents were selected using a random location methodology, with quotas set on age and by gender within working status across 175 locations across the United Kingdom, including Northern Ireland.
- Interviews were conducted in-home using CAPI.²

Phase 2: Online Survey

Research Aims

Following the omnibus study it was determined that a very low rate of incidence would not produce an adequate sample size for sub level analysis for ADR Users, within reasonable time and cost parameters of the study

With this background, it was therefore decided that the research should focus on understanding the experience of consumers who were eligible for ADR referral

- To better understand the general effectiveness of complaints handling
 - Awareness of ADR among Eligible Complainants
 - The complaint process: channels used, when notification was received, complaint resolution
 - Satisfaction with the complaints process
- To gauge compliance with recently introduced measures, particularly GC 14 and the complaints handling code
 - Promoting awareness of ADR among customers
 - Providing information on ADR at the appropriate time
 - Reasons consumers did not proceed to ADR
- If possible, to measure consumer satisfaction with the two existing ADR schemes
 - Comparison of satisfaction levels among those who are in/went through the ADR process and those who aren't/did not

² Computer Assisted Personal Interviewing is a method of face-to-face interviewing where the interviewer is prompted with questions via a laptop and the respondents answers are keyed-in directly.

Methodology

- The data in this report was gathered in 20 minute interviews using an online methodology via Research Now panellists. Fieldwork was conducted over a two week period between 18 February and 5 March 2013
- 1,524 interviews were completed among respondents deemed eligible for ADR referral who had made a complaint to their communications provider within the last 12 months. 111 of these respondents were ADR users.
- When Eligible Complainants had more than one eligible complaint, preference was given to the most recent complaint or the complaint which had progressed further in the complaints procedure.
- Complaint Definitions:
 - Eligible complaint– A complaint that is unresolved for >8 weeks, or a complaints that has been unresolved for <8 weeks but for which the complainant has received written notification of their right to Apply to ADR or a Deadlock Letter. Eligibility refers to eligibility for ADR referral, not necessarily eligible for acceptance to an ADR scheme.
 - Referred to ADR – A complaint when the complainant recalls receiving written notification of their right to apply to ADR. This will include complainants whose ADR application was rejected (about 20% of those referred to ADR)
 - ADR User – A complainant whose application to ADR has been accepted and who has proceeded with ADR
- The exploratory omnibus phase identified a small number of Eligible Complainants which permitted a broad profile comparison. This profile was used to weight the online survey data to the profile of social grades among Eligible Complainants.

Main Report

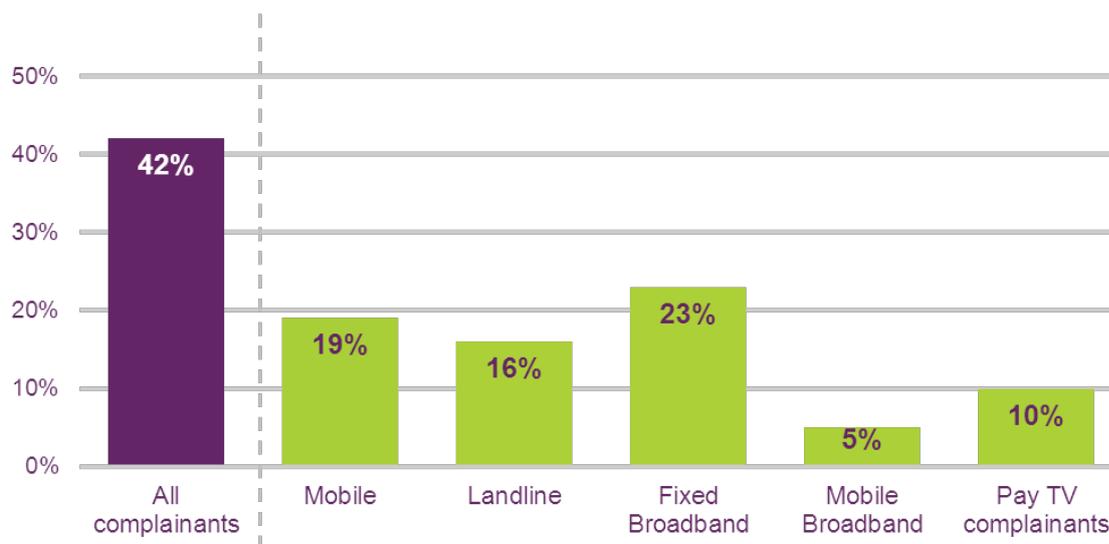
The complaints process represents a major part of the UK communications landscape

Just over a quarter of complainants surveyed were eligible for ADR referral

Figure 1.1 (below) shows the proportion of all screened respondents in this study who made any complaint to their communications provider in the last 12 months.

42% of those screened said they had made at least one complaint to a communications provider in the last 12 months. Fixed broadband was the most complained about service overall among all those screened for this study, with just under a quarter (23%) having done so.

Figure 1.1: All screened respondents making any complaint in the last 12 months



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

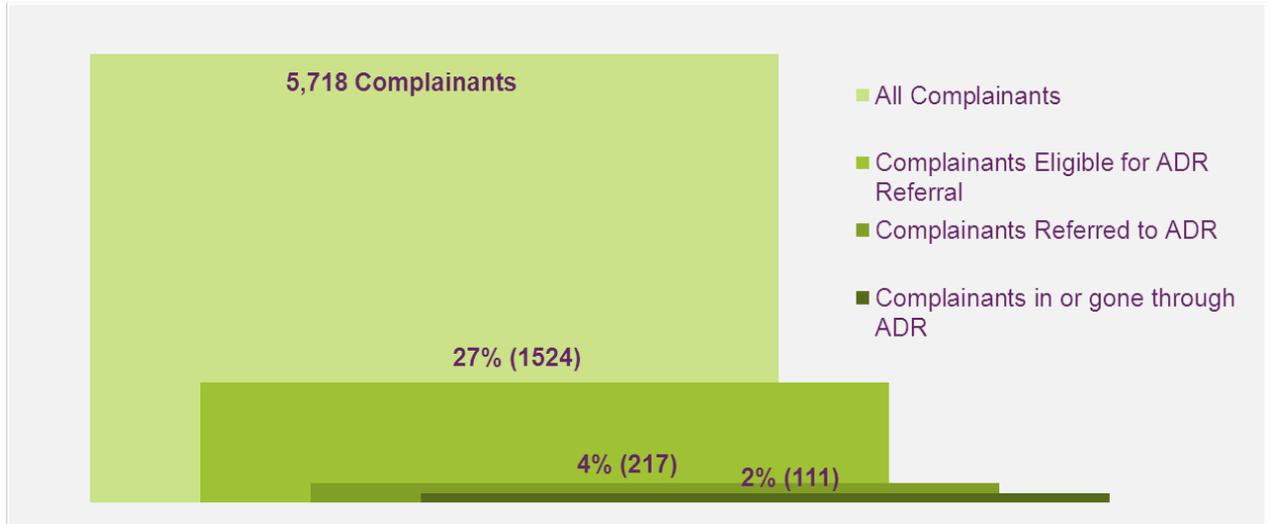
Base: All screened (n=13711)

Source: ADR Online research, February-March 2013

Figure 1.2 (below) shows the proportion of complainants screened who were eligible for referral to ADR, and therefore eligible for this study.

Just over a quarter (27%) of complainants were eligible for ADR referral, however only 4% of all complainants screened were actually referred to ADR.

Figure 1.2: All complainants screened



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

Q6 Have any of these complaints taken 8 or more weeks to resolve?

QC3.1 Did you receive written notification from your provider informing you about your right to apply to an ADR scheme in any of the following ways?

Q9.2 When your ADR application was accepted did you proceed with this complaint via the ~ADR scheme with either the Ombudsman Service or CISAS?

Base: Screen out Data: All complainants: (n=5781)

Source: ADR Online research, February-March 2013

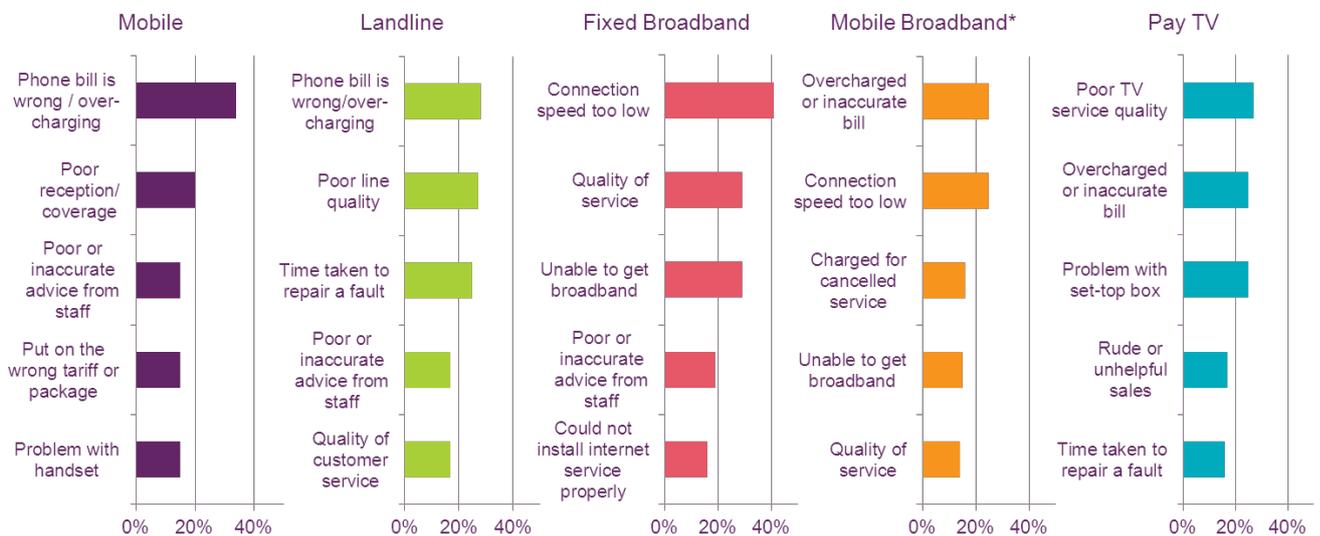
Over charging or billing were the most common causes of complaint among those eligible for ADR referral

Figure 1.3 (below) shows the top five most commonly most frequently mentioned causes for complaint across provider types among Eligible Complainants.

‘Phone bill is wrong / overcharging’ or ‘Overcharged or inaccurate bill’ were the most commonly cited reasons for complaint among mobile, landline and mobile broadband complainants, with ‘Overcharged or inaccurate bill’ the second most cited complaint for pay TV complainants, after ‘Poor TV service quality’. *NB: small base size for Mobile Broadband.*

Fixed broadband complaints were more likely to be around quality of service issues.

Figure 1.3: Top five causes for complaint by provider type among Eligible Complainants



Q10 What was the nature of this complaint to your provider (multi-code)?

Base: All Eligible Complainants: Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87*); Pay TV (n=149)

* indicates a base size lower than 100

Source: ADR Online research, February-March 2013

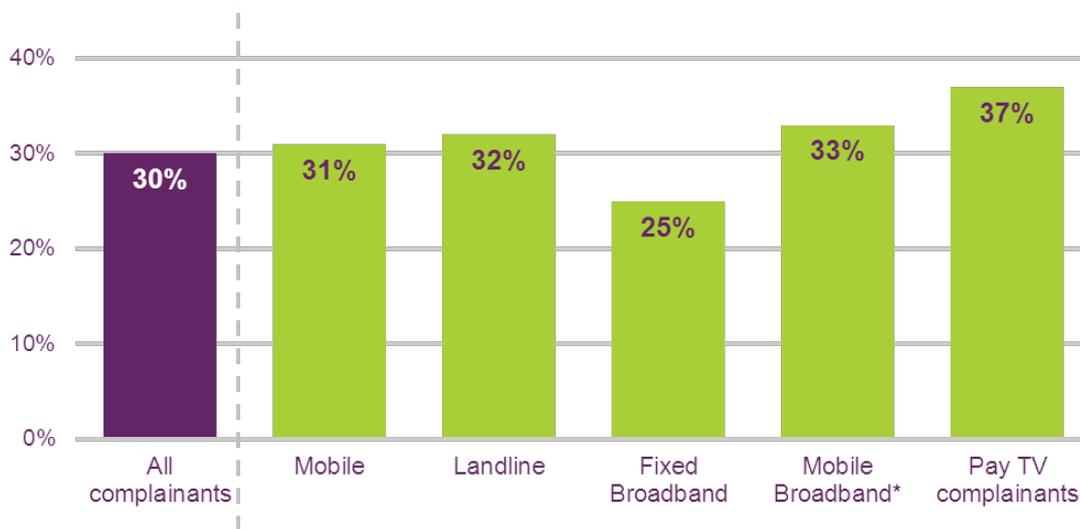
A key problem was low ADR awareness and usage among Eligible Complainants

Low rates of ADR Awareness

Figure 1.4 (below) shows the level of ADR awareness among all Eligible Complainants and across provider types.

Only 30% of Eligible Complainants were aware of ADR. Awareness of ADR was lower among fixed broadband complainants (25%) and highest among pay TV complainants (37%).

Figure 1.4: ADR awareness among Eligible Complainants



Q7 Were you aware of this scheme before now?

Base: All Eligible Complainants: (n=1524); Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87); Pay TV (n=149); Bundle Complainants (n=646)

Source: ADR Online research, February-March 2013

Figure 1.5 (below) shows at what point during the complaints process Eligible Complainants and ADR users became aware of ADR.

20% of complainants who were aware of ADR did not become so until after their complaint was resolved. Awareness of ADR before and during the complaint was higher among ADR users.

Figure 1.5: Awareness of ADR schemes when making complaint



Q14 You mentioned earlier that you were aware of the Alternative Dispute Resolution scheme before now. Were you aware of this scheme when you made this complaint to [INSERT NAME OF PROVIDER FROM Q11]?

Base: Eligible Complainants: Aware of ADR (n=452), ADR Users (n=111)

Source: ADR Online research, February-March 2013

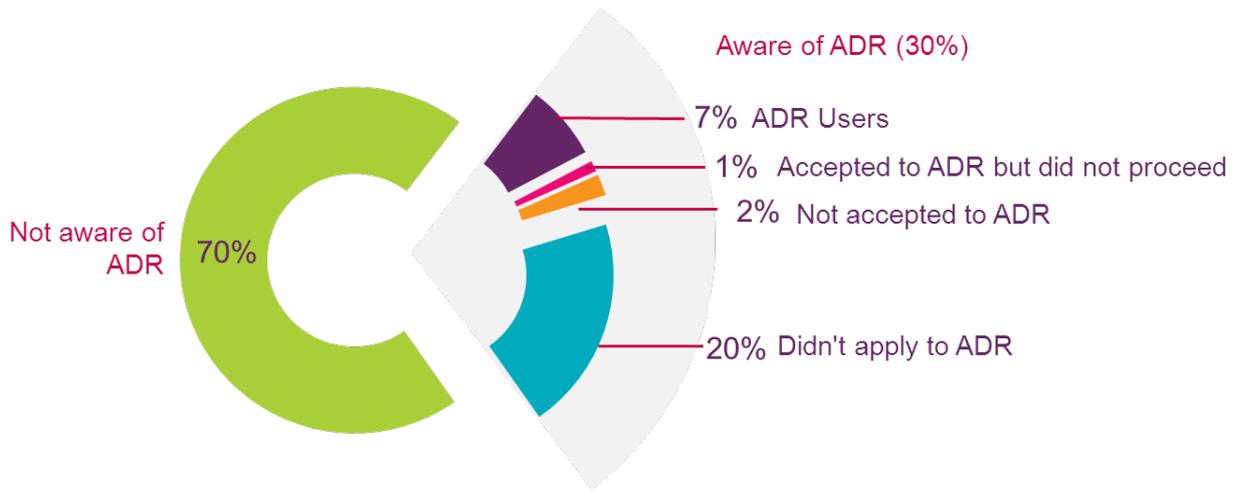
ADR usage was low among those who were aware of ADR

Figure 1.6 (below) shows a breakdown of complaint progression among Eligible Complainants.

Overall of those complainants who were eligible for ADR 20% did not go on to apply to use and ADR scheme. This is 66% of all those Eligible Complainants who were aware of ADR.

10% of Eligible Complainants did apply to an ADR scheme.

Figure 1.6: Complainant types among all Eligible Complainants



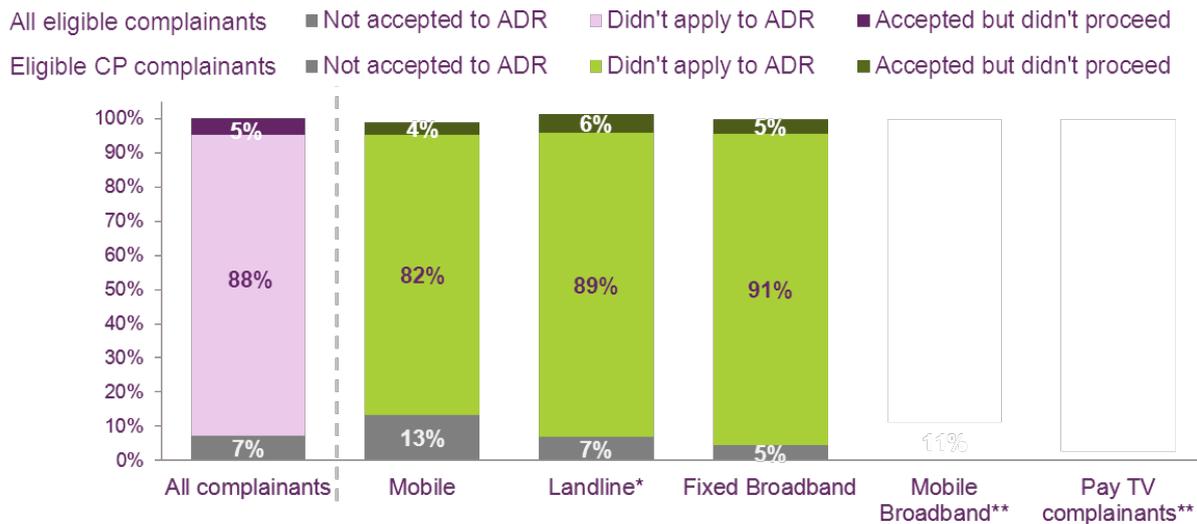
Base: All Eligible Complainants: (n=1524)

Source: ADR Online research, February-March 2013

Figure 1.7 (below) shows the escalation of the complaint among those aware of ADR but who did not use the scheme, among all Eligible Complainants and split by provider type.

Overall, the vast majority (88%) of those aware of ADR but who did not use the scheme ('Accepted to ADR but did not proceed', 'Not accepted to ADR', 'Didn't apply to ADR' in Figure 1.6) did not actually apply to have their complaint considered by ADR. Of those who did apply to ADR, 7% had their application rejected and 5% had their application accepted, but did not proceed to use ADR.

Figure 1.7: Complainants aware of but not using ADR by provider type



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

Q9.1 Was your application accepted or rejected?

Q9.2 When your ADR application was accepted did you proceed with this complaint via the ~ADR scheme with either the Ombudsman Service or CISAS?

Base: All Eligible Complainants Aware of ADR: (n=452); ADR Aware but not using: (n=341); Mobile ADR Aware (n=101); Landline ADR Aware(n=69); Fixed Broadband ADR Aware (n=114); Mobile Broadband ADR Aware (n=17); Pay TV ADR Aware (n=40)

* indicates a base size lower than 100

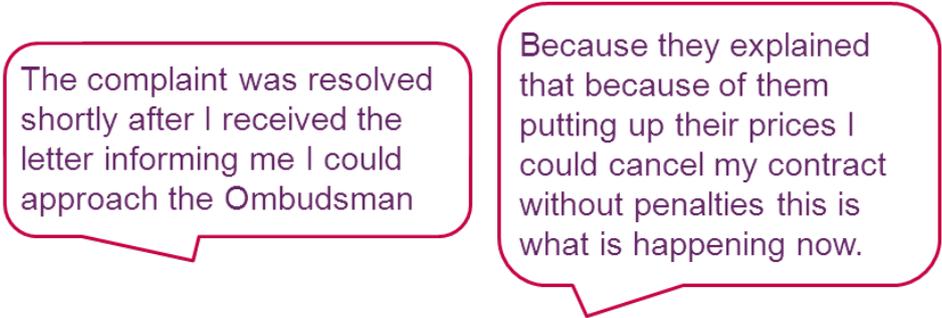
** indicates a base size lower than 50. Data with base sizes lower than 50 have been excluded from the results as these are not statistically robust.

Source: ADR Online research, February-March 2013

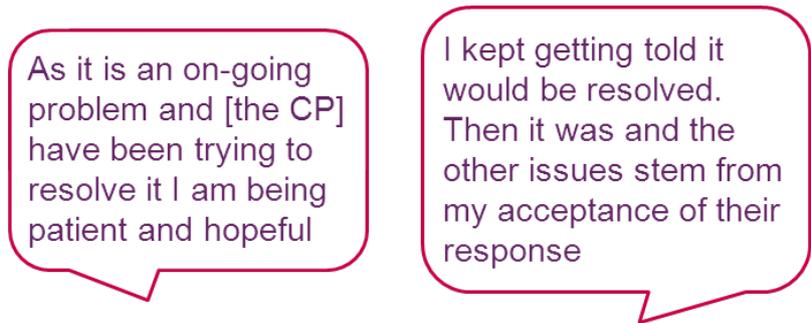
Key themes in stated reasons for not using ADR when aware

The 66% of complainants who were aware of ADR but did not use the scheme were asked why they did not go on to use the scheme. Their responses fell broadly into three categories:

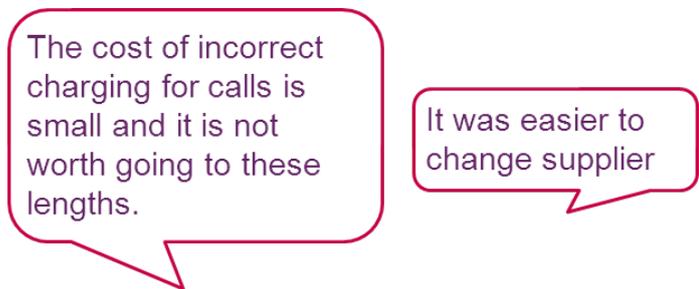
- Complaint resolved by provider or beginning to be resolved



- Complainant preferred to give the provider a chance before going to ADR



- Complainant felt the process was 'not worth the hassle' or switched provider



Q15 Why did you not use the Alternative Dispute resolution scheme to resolve your complaint with [INSERT NAME OF PROVIDER FROM Q11]?

Base: ADR Aware but not using: (n=341)

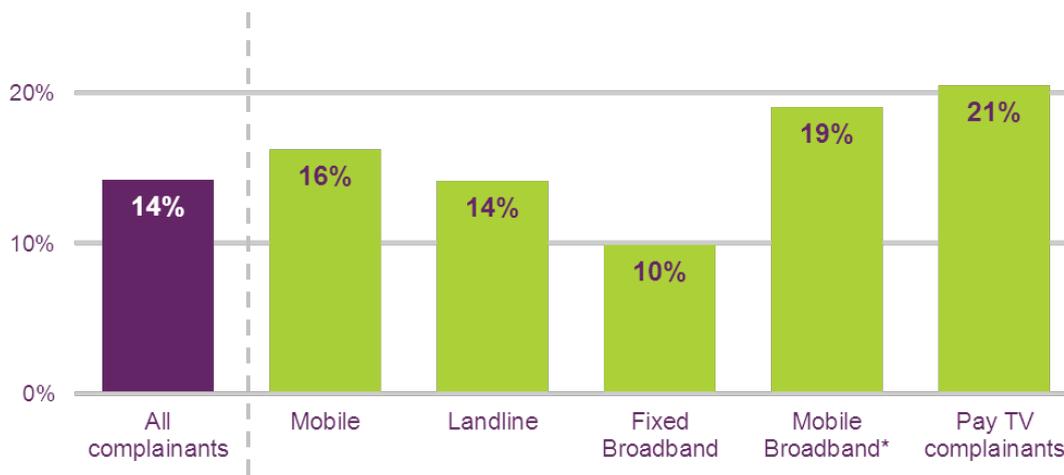
Source: ADR Online research, February-March 2013

Consumers relied on CPs to tell them about ADR

Figure 1.8 (below) shows the proportion of Eligible Complainants who recalled receiving written notification of their right to apply to an ADR scheme.

Just 14% of all Eligible Complainants recalled receiving written notification of their right to apply to ADR. This varied across provider types. Over a fifth (21%) of pay TV complainants recalled receiving written notification while just 1 in 10 (10%) of fixed broadband complainants recalled receiving written notification.

Figure 1.8 Eligible Complainants who recalled receiving written notification of ADR



QC3.1 Did you receive written notification from your provider informing you about your right to apply to an ADR scheme in any of the following ways?

Base: Eligible Complainants: (n=1524); Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87); Pay TV (n=149); Bundle Complainants (n=646)

* indicates a base size lower than 100

Source: ADR Online research, February-March 2013

Figure 1.9 (below) shows the different ways in which complainants aware of ADR first heard about the scheme, split by provider type.

Pay TV complainants, who were most likely to be aware of ADR, had most often first heard of the scheme verbally via their service provider (9%) or from someone else such as a friend, colleague or relative (8%)

Mobile broadband complainants were more likely to have been informed verbally by their service provider (10%) or via a letter sent by their service provider (6%) than other complainants. *NB: small base size for Mobile Broadband.*

Figure 1.9 How Eligible Complainants first heard about ADR



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

Base: Eligible Complainants: Mobile (n=496); Landline (n=270); Fixed Broadband (n=522); Mobile Broadband (n=87); Pay TV (n=149)

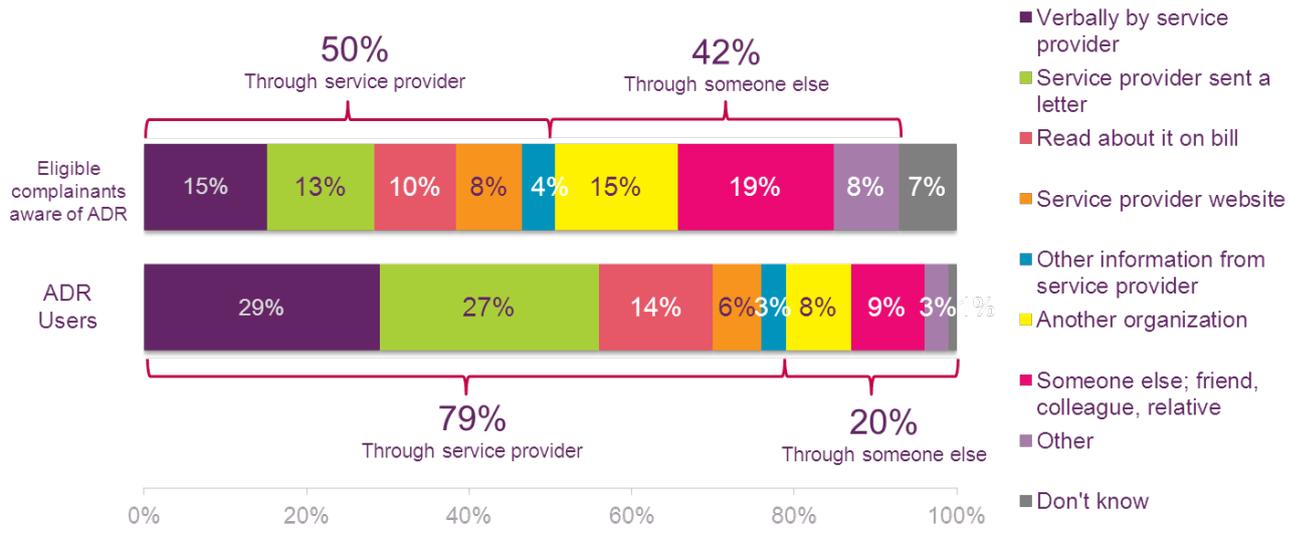
* indicates a base size lower than 100

Source: ADR Online research, February-March 2013

Figure 1.10 (below) compares the different ways in which Eligible Complainants who were aware of ADR and ADR users first became aware of ADR.

Half of Eligible Complainants aware of ADR first became aware of the scheme via their service provider. Among complainants who went on to become ADR users the majority (79%) first heard about ADR through their service provider.

Figure 1.10 How Eligible Complainants who were aware of ADR first became aware of ADR



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

Base: Eligible Complainants aware of ADR (n=452), ADR Users (n=111)

Source: ADR Online research, February-March 2013

Figure 1.11 (below) shows the proportion of Eligible Complainants who requested a deadlock letter from their service provider and those who received a deadlock letter.

Just under a 1 in 10 complainants requested a deadlock letter (a letter or email from a provider to a complainant explaining that their complaint is considered deadlocked) and about 7% of complainants said they had received a deadlock letter.

However, 22% of respondents who said they had received a deadlock letter were not aware of ADR.

Figure 1.11 Deadlock letter requests and responses to requests



A deadlock letter is a letter or email from a provider to a complainant explaining that their complaint is considered deadlocked.

QDL1 Did you at any point request a deadlock letter from your service provider?

QDL2 Did you receive a deadlock letter from your provider?

Base: Eligible Complainants: (n=1524); Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87); Pay TV (n=149)

* Indicates a base size lower than 100

Source: ADR Online research, February-March 2013

Consumer complaint experience

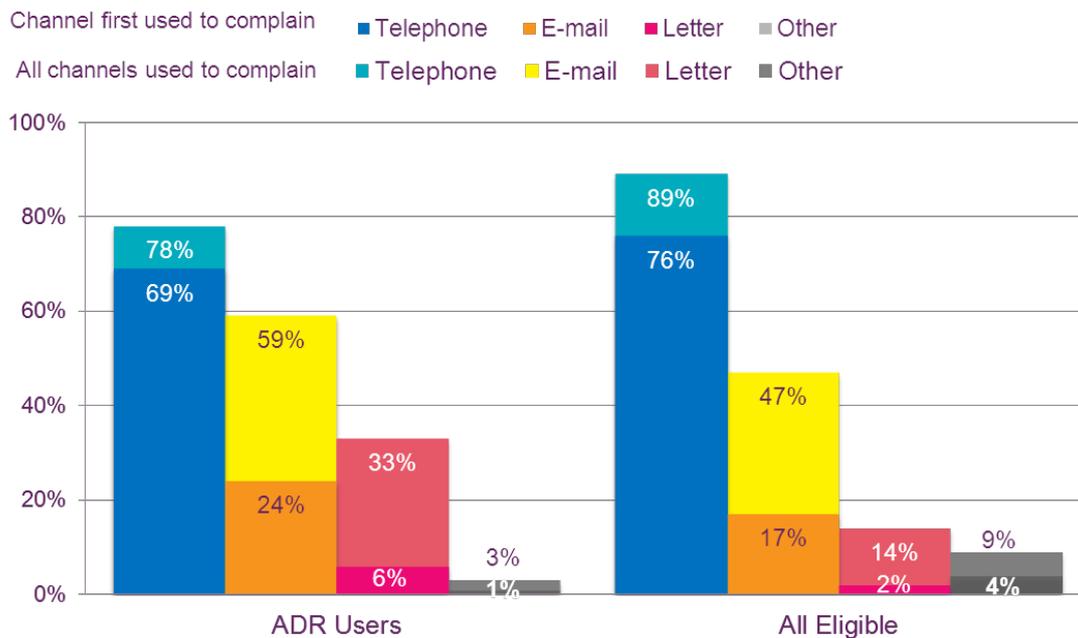
How consumers complained

Figure 1.12 (below) shows the channels used by Eligible Complainants in making their complaint to their provider.

Over the telephone was the most commonly used channel to make a complaint by Eligible Complainants with 89% using this channel.

However, complainants who went on to use ADR were more likely to have used written communication (59% by email, 33% by letter) at some point during their complaint than Eligible Complainants overall.

Figure 1.12: Channels used to complain



QC2Which of these did you first use to make this complaint to [INSERT NAME OF PROVIDER FROM Q11]?

QC2b Which other methods did you use, if any, to contact [INSERT NAME OF PROVIDER FROM Q11] during the complaint process?

Base: Eligible Complainants: (n=1524); ADR Users (n=111)

Source: ADR Online research, February-March 2013

The cost of pursuing a complaint

Table 1.1 (below) shows the average amount of time spent on a complaint, the average number of times a provider was contacted and the average total cost of pursuing a complaint in monetary terms.

On average ADR users spent slightly more time pursuing their complaint and had a higher total cost for their complaint than all Eligible Complainants. However, less effort was needed in terms of the number of times they had contacted their provider.

Across service provider types landline complainants spent the longest amount of time on their complaints (6.6 hours) and contacted their provider the greatest number of times (6.7 times on average).

Table 1.1: Mean averages of time, effort and cost involved in pursuing a complaint

	Complainant type		Provider type (all complainants)				
	ADR Users	Eligible Complainants	Mobile	Landline	Fixed Broadband	Mobile Broadband *	Pay TV
Time spent on complaint (hours)	6.1	6	5.8	6.6	6	5.9*	5.4
Number of times contacted provider	5.3	5.9	5.8	6.8	5.8	4.8*	6.1
Total cost of complaint	£66.48	£50.83	£50.21	£56.83	£46.48	£61.98*	£51.26

Q23 Overall, how much time did you spend actively pursuing this complaint with [INSERT NAME OF PROVIDER FROM Q11], i.e. writing letters, emails, making phone calls etc. until the complaint was resolved (or up until now if the complaint remains unresolved)?

QCC On how many separate occasions did you contact [INSERT NAME OF PROVIDER FROM Q11] regarding this complaint?

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

Base: Eligible Complainants: (n=1524); ADR Aware (n=452); Not Aware of ADR (n=1072); Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87); Pay TV (n=149)

* Indicates a base size lower than 100

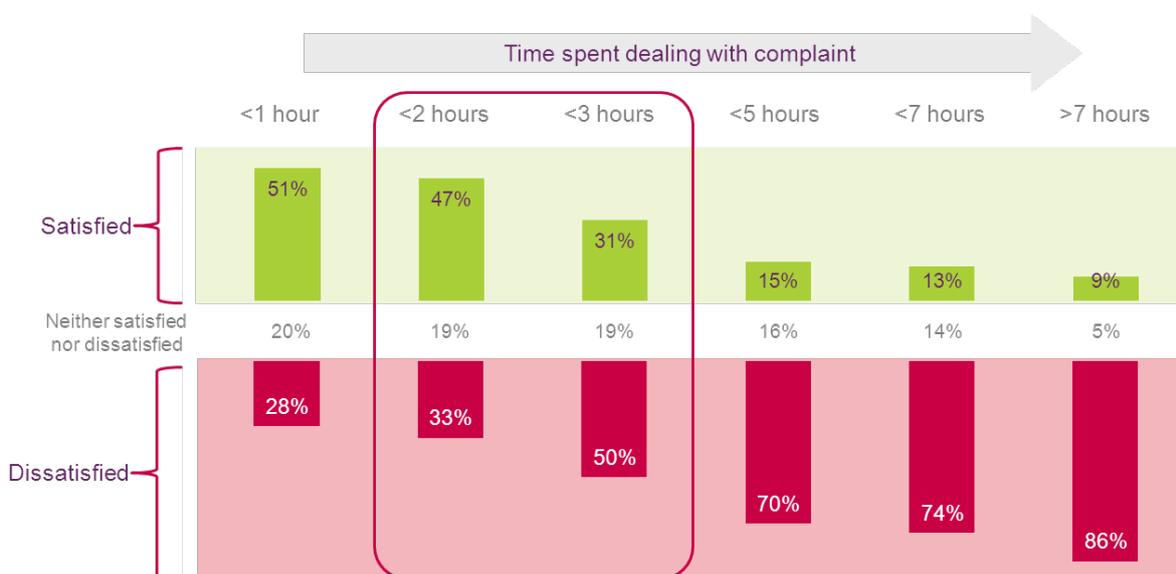
Source: ADR Online research, February-March 2013

Figure 1.13 (below) compares the amount of time complainants whose complaint had been resolved spent dealing with their complaint against levels of satisfaction with the time taken to resolves their complaint.

Just under half of complainants (47%) who spent less than two hours dealing with their complaint were satisfied with the time taken to resolve their complaint. A third of complainants were dissatisfied after having spent less than 2 hours on their complaint.

However, dissatisfaction with the time taken to resolve their complaint rose to 50% among complainants who spent up to three hours dealing with their complaint.

Figure 1.13: Satisfaction with time taken to resolve complaint among completed complaints



'Satisfied' shows the rate of respondents coding 5-7 for satisfaction in Q21
 'Dissatisfied' shows the rate of respondents coding 1-3 for satisfaction in Q21

Q21 How satisfied were you with the time it took to resolve the complaint you had with [INSERT NAME OF PROVIDER FROM Q11] on this occasion? Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'
 Q23 Overall how much time did you spend actively pursuing this complaint with [INSERT NAME OF PROVIDER FROM Q11], i.e. writing letters, emails, making phone calls etc. until the complaint was resolved?

Base: Eligible Complainants with Completed complaints: (n=893)

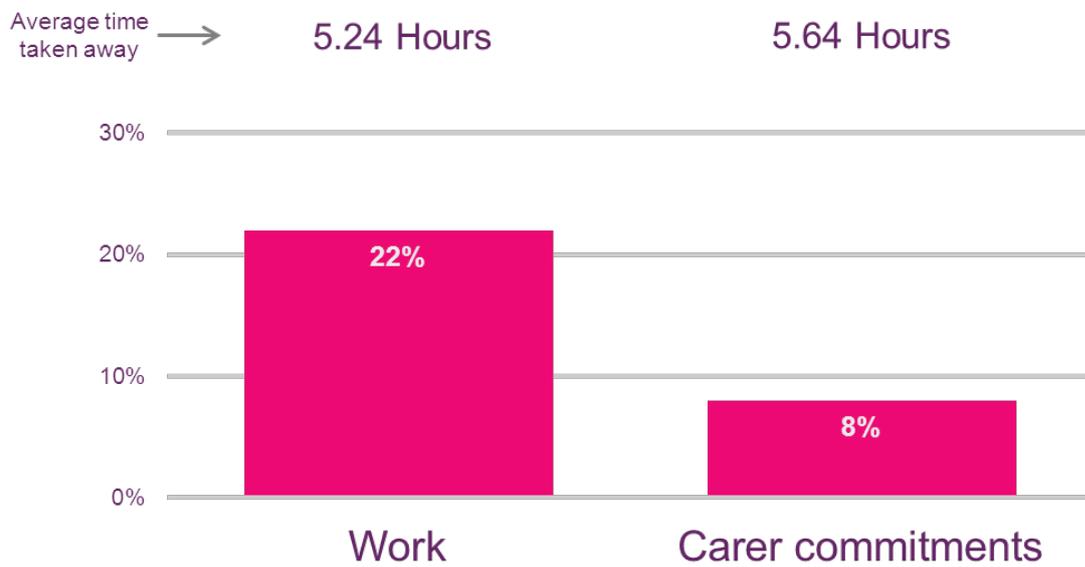
Source: ADR Online research, February-March 2013

Figure 1.14 (below) shows the proportions of Eligible Complainants who took time away from work or carer commitments to deal with their complaints and the average length of time taken.

22% of complainants who were employed took time away from work to deal with their complaint, taking on average 5.24 hours to deal with their complaint during this time. Landline complaints were the most commonly dealt with complaints during working hours.

8% of complainants took time away from carer commitments to deal with their complaint, taking on average 5.64 hours to deal with their complaint during this time.

Figure 1.14: Complainants who took time away from work or carer commitments to deal with complaint



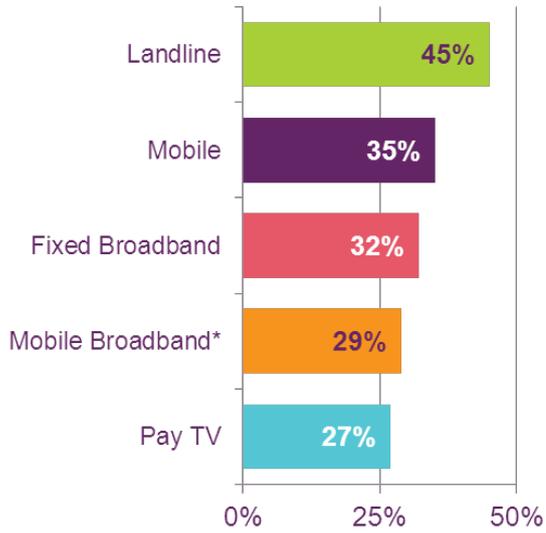
QC5.1 Did you take any time away from work/carers commitments in order to deal with this complaint?
 QC5.2 How much time did you take away from work/carers commitments?

Base: Eligible Complainants: (n=1524): All Eligible Complainants employed n=985)

Source: ADR Online research, February-March 2013

Figure 1.15 (below) shows the complaints dealt with during working hours.

Figure 1.15: Provider complaints dealt with during working hours



QC5.1 Did you take any time away from work/carer commitments in order to deal with this complaint?
QC6 When ere you dealing with this complaint?

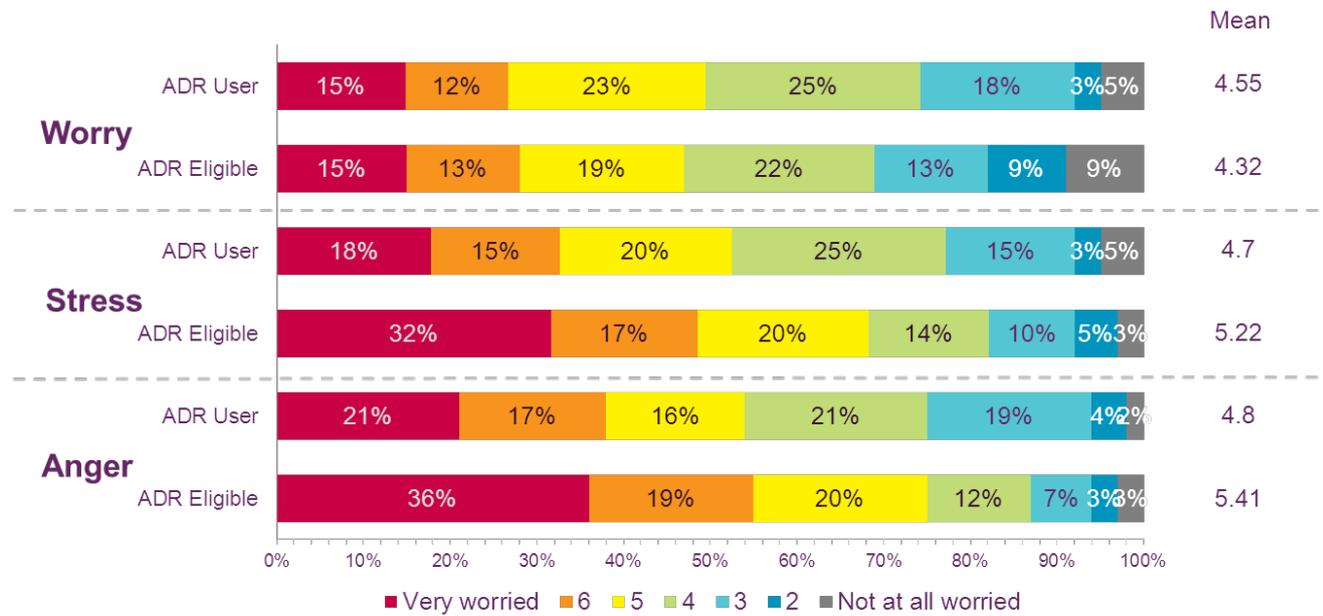
Base: All Eligible Complainants employed n=985)

Source: ADR Online research, February-March 2013

Figure 1.16 (below) shows levels of worry, stress and anger felt by complainants during their complaints.

The vast majority of complainants reported that they felt levels of worry, stress and anger during the complaint process. However, using the ADR process does appear to have reduced this significantly.

Figure 1.16: Levels of worry, stress and anger during complaint



Q24/Q25/Q25 How worried/ stressful/ angry did you feel while trying to resolve the complaint?

Base: Eligible Complainants: (n=1524); ADR Users (n=111)

Source: ADR Online research, February-March 2013

Complaint outcomes and perceptions of fairness

Figures 1.17 and 1.18 (below) show the reported status of complaint resolution among Eligible Complainants and the perceived fairness of the resolution procedure among completed and partly completed complaints.

ADR users were more likely to have had their complaint resolved (65%) or partly resolved (28%) than all Eligible Complainants. ADR users perceived a higher level of fairness (24%) in their complaint resolution than all Eligible Complainants (18%).

Across provider types mobile and landline providers were least likely to have progressed a complaint to completion (55% and 54% respectively).

Figure 1.17: Complaint resolution and perception of fairness: ADR users vs All Eligible



Q12 What is the status of this complaint with [INSERT NAME OF PROVIDER FROM Q11]?
 QF1 To what extent do you think your complaint was resolved fairly by your provider? Please select one answer on a scale of 1-7 where 1 is 'Very unfairly' and 7 is 'Very fairly'

'Fairly resolved' complaints shows rate of complainants coding 6-7 in a scale of 7 for fairness, set out in the list of questions above.

Base: Eligible Complainants: (n=1524); ADR Users (n=111); Completed/Partly completed complaints; All Eligible (n=1115); ADR Users (n=104)

Source: ADR Online research, February-March 2013

Figure 1.18: Complaint resolution and perception of fairness among all Eligible Complainants: split by provider type



Q12 What is the status of this complaint with [INSERT NAME OF PROVIDER FROM Q11]?
 QF1 To what extent do you think your complaint was resolved fairly by your provider? Please select one answer on a scale of 1-7 where 1 is 'Very unfairly' and 7 is 'Very fairly'

'Fairly resolved' complaints shows rate of complainants coding 6-7 in a scale of 7 for fairness, set out in the list of questions above.

Base: Eligible Complainants: Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87); Pay TV (n=149); Completed/Partly completed complaints: Mobile (n=343); Landline (n=189); Fixed Broadband (n=391); Mobile Broadband (n=71); Pay TV (n=121)

* indicates a base size lower than 100

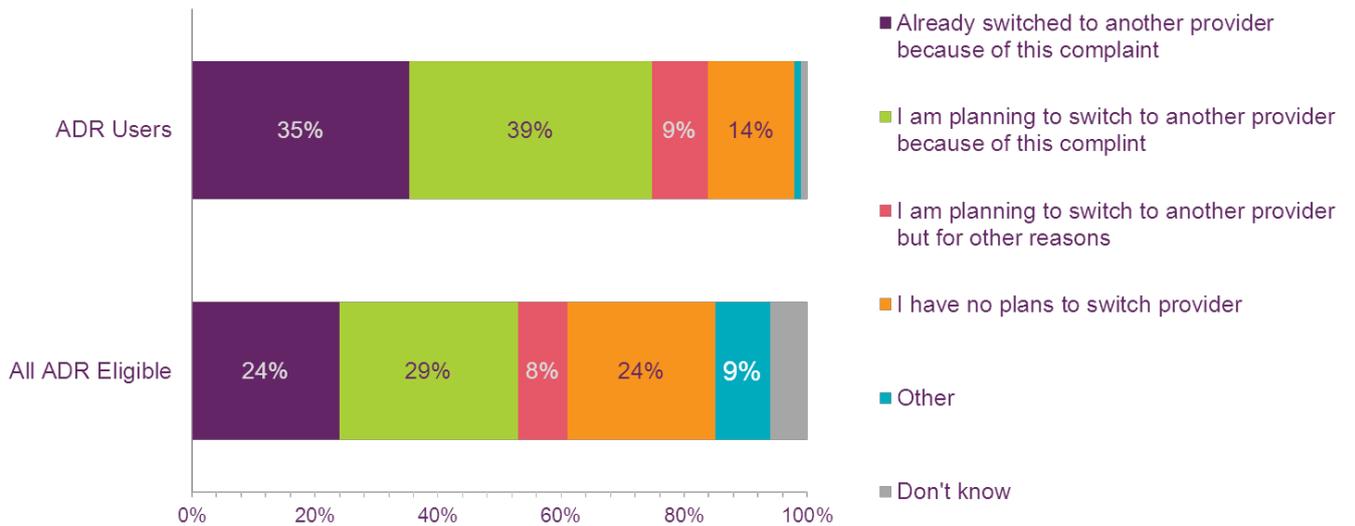
Source: ADR Online research, February-March 2013

Figure 1.19 (below) shows actions taken or planned to be taken by complainants in regard to their relationship with their provider.

Overall, more than half (53%) of complaints, whose complaint had been unresolved for over eight weeks or had reached a point of deadlock with their provider, had already switched or planned to switch provider because of their complaint.

Among ADR users those who had switched or planned to switch providers rose to 74%.

Figure 1.19: Plans to switch provider



Q28 Which of the following statements best describes what you have done (or plan to do) about your relationship with [INSERT NAME OF SERVICE PROVIDER FROM Q11]?

Base: Eligible Complainants: (n=1524); ADR Users (n=111)

Source: ADR Online research, February-March 2013

Satisfaction – ADR offered a more satisfactory experience

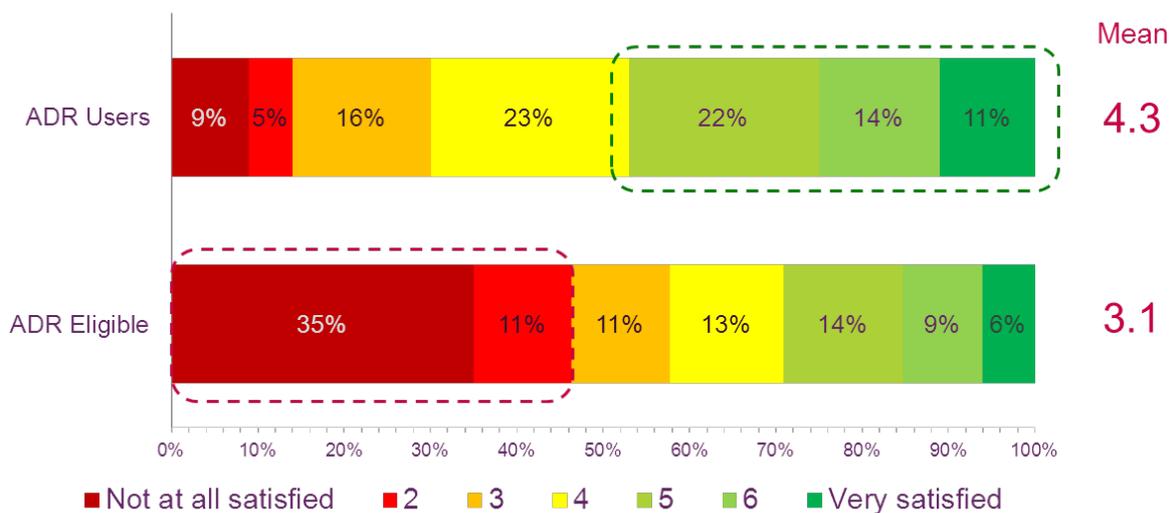
Overall satisfaction with the complaints procedure and key satisfaction metrics

Figure 1.20 (below) shows Eligible Complainants’ levels of satisfaction with the final outcome of their complaint.

Overall, 29% of Eligible Complainants were satisfied with the final outcome of their complaint. However 46% were very dissatisfied with the final outcome of their complaint.

Satisfaction with the final outcome of the complaint is much higher among ADR users (47%).

Figure 1.20: Satisfaction with final outcome of complaint



Q18 Overall, how satisfied were you with the final outcome of this complaint

Base: Eligible Complainants: (n=1524); ADR Users (111)

Source: ADR Online research, February-March 2013

Tables 1.2 and 1.3 (below) shows discontent among Eligible Complainants across satisfaction measures.

'Ease of resolving complaint with provider' and 'time taken to resolve complaint' appear to be the main drivers of dissatisfaction among Eligible Complainants with 60% dissatisfied with the time taken to resolve their complaint and 57% dissatisfied with the ease of resolving their complaint with their provider.

Table 1.2: Discontent with complaints process

Dissatisfied Showing rate of respondents who coded 1-2 on a scale of 7 for the Satisfaction questions listed below. We consider these respondents 'Dissatisfied'	All	Provider type				
		Mobile	Landline	Fixed Broadband	Mobile Broadband*	Pay TV
Dissatisfaction with final outcome	46%	49%	47%	46%	36%	40%
Ease of resolving complaint with provider (Bottom 2 Boxes)	57%	58%	60%	58%	42%%	51%
Ease of getting provider to recognise complaint (Bottom 2 Boxes)	42%	44%	45%	42%	24%	40%
Dissatisfaction with provider making it clear how complaint would be handled	46%	48%	46%	44%	38%	48%
Dissatisfaction with time taken to resolve complaint	60%	61%	64%	62%	45%	55%

Q18 Overall, how satisfied were you with the final outcome of this complaint

Q19 And how easy was it to resolve this complaint

Q20a And how easy was it to get **[INSERT NAME OF PROVIDER FROM Q11]** to recognise that you were making a complaint

Q20b And how satisfied were you with **[INSERT NAME OF PROVIDER FROM Q11]** with regard to them making it clear how this complaint would be handled?

Base: Eligible Complainants: (n=1524); Mobile (n=496); Landline (n=270); Fixed Broadband (n=552); Mobile Broadband (n=87); Pay TV (n=149)

* indicates a base size lower than 100

Source: ADR Online research, February-March 2013

Table 1.3: Discontent with complaints process

Dissatisfied Showing rate of respondents who coded 1-2 on a scale of 7 for the Satisfaction questions listed below. We consider these respondents 'Dissatisfied'	Complainant Type	
	ADR Users	Eligible Complainants
Dissatisfaction with final outcome	14%	46%
Ease of resolving complaint with provider (Bottom 2 Boxes)	22%	57%
Ease of getting provider to recognise complaint (Bottom 2 Boxes)	18%	42%
Dissatisfaction with provider making it clear how complaint would be handled	22%	46%
Dissatisfaction with time taken to resolve complaint	22%	60%

Q18 Overall, how satisfied were you with the final outcome of this complaint

Q19 And how easy was it to resolve this complaint

Q20a And how easy was it to get **[INSERT NAME OF PROVIDER FROM Q11]** to recognise that you were making a complaint

Q20b And how satisfied were you with **[INSERT NAME OF PROVIDER FROM Q11]** with regard to them making it clear how this complaint would be handled?

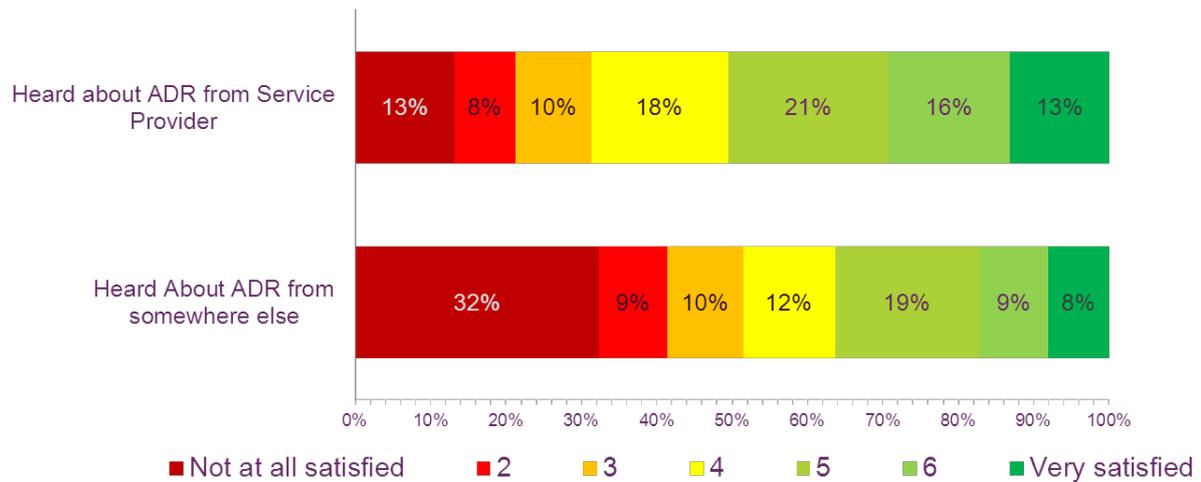
Base: Eligible Complainants: (n=1524); ADR users (n=111)

Source: ADR Online research, February-March 2013

Figure 1.21 (below) shows levels of satisfaction with the final outcome among those aware of ADR split by those who became aware via their service provider and those who became aware from somewhere else.

Eligible Complainants who were aware of ADR had higher levels of satisfaction (50%) with the final outcome of their complaint if they had first been made aware of ADR by their provider than those who had heard from somewhere else.

Figure 1.21: Satisfaction with final outcome of complaint among ADR aware



Q18 Overall, how satisfied were you with the final outcome of this complaint

Base: Eligible Complainants Aware of ADR (n=452); Aware of ADR who heard about ADR from Service Provider (n=229); Aware of ADR who heard about ADR from somewhere else (n=191)

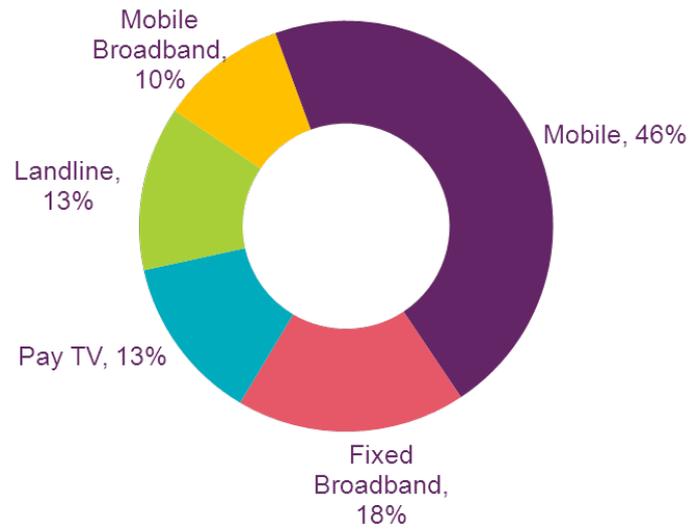
Source: ADR Online research, February-March 2013

ADR Users by service provider

Figure 1.22 (below) shows the provider type complained about among ADR users.

Almost half (46%) of those using ADR were mobile complainants. Fixed broadband complainants made up just under a fifth (18%) of ADR users.

Figure 1.22: ADR user by service provider



Base: ADR Users (n=111)

Source: ADR Online research, February-March 2013

Complainant profiles and ADR preferences

Demographic profiles

Tables 1.4 – 1.6 (below) show ADR eligibility and usage by gender, age group and employment type.

Men and younger Eligible Complainants over-indexed on progression to using ADR. Men accounted for just 43% of those eligible for ADR referral but accounted for 53% of ADR users. While those aged 35 and over accounted for 69% of those eligible for ADR referral, they made up less than half (40%) of those who went on to use ADR. This is reflected in retired complainants under-indexing in ADR usage.

The self employed, those on home duties also under-index in ADR usage

Tables 1.4-1.5: ADR Eligibility and Usage by Gender and Age

Gender	ADR Eligible	ADR User
Male	43%	53%
Female	57%	47%

Age	ADR Eligible	ADR User
16-24	13%	28%
25-34	18%	32%
35-44	19%	20%
45-54	18%	12%
55-64	15%	5%
65+	17%	2%

Q3 Are you...? Male/Female

Q4 Please enter your age into the box below.

Base: All Eligible Complainants: (n=1524)

Source: ADR Online research, February-March 2013

Table 1.6: ADR Eligibility and Usage by employment type

Employment	ADR Eligible	ADR User
Employed	52%	71%
Self employed	10%	5%
Unemployed	6%	5%
Home Duties	6%	1%
Student	6%	11%
Retired	18%	3%
Other	2%	3%

Q1 Which of the following best describes your working status?

Base: All Eligible Complainants: (n=1524)

Source: ADR Online research, February-March 2013

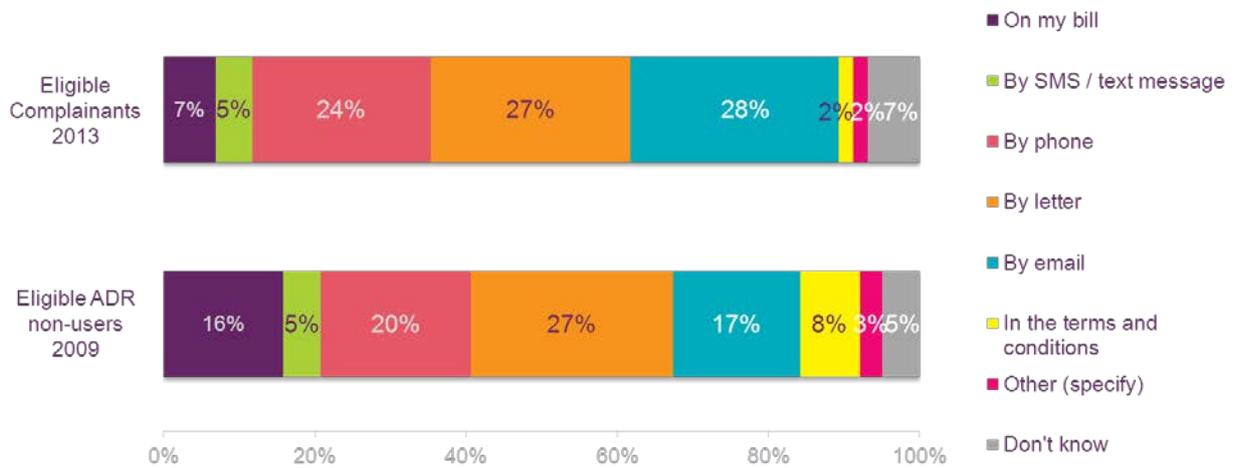
ADR preferences

Figure 1.23 (below) shows the methods by which Eligible Complainants would have preferred to have been informed about ADR

Email is now the most preferred method for being informed about ADR, with 28% of Eligible Complainants preferring this channel, compared to 17% in 2009.

Email is followed by letter (27%) and by phone (24%).

Figure 1.23: Way in which provider should inform about ADR



Q17 How would you have liked [INSERT NAME OF PROVIDER FROM Q11] to inform you about the point at which you were eligible to submit an application to the Alternative Dispute Resolution schemes?

Base: Eligible Complainants 2013: (n=1524); Eligible ADR non-users 2009 (n=436)

Source: ADR Online research, February-March 2013; Consumer Complaints Market Research Report 2009

Appendix 1: Online questionnaire

Q1 Which of the following best describes your working status?
Please select one answer

Employed
Self-employed
Unemployed
Home duties
Student
Retired
Other

Q3 Are you...?
Please select one answer

Male
Female

Q4 Please enter your age into the box below.

[RANGE 11-99. TERMINATE IF LESS THAN 16]

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

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

Please select one answer for each type of provider

[GRID]

Yes
No

Mobile phone service provider
Landline phone service provider
Fixed broadband service provider
Mobile Broadband service provider
Pay TV service provider

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

ASK IF MULTIPLE CODES Q5 1-5

Q5. 1 You have complained to a provider about more than one communications service. Was this a single complaint about a bundle of services (i.e. a single package that covers two or more of your landline, mobile phone broadband services or Pay TV services) or more than one complaint?

More than one complaint
 A single complaint to/about the provider of a bundle
 Don't know [CLOSE]

ASK ALL WITH SINGLE CODE ONLY AT Q5

Q5.2 Was this complaint about a service that comes as part of a bundle of services (ie a single package that covers two or more of your landline, mobile phone broadband services or Pay TV services)

Yes
 No

SCRIPTWRITER: IF Q5.1= A single complaint to/about the provider of a bundle OR Q5.2= Yes FLAG AS 'BUNDLE COMPLAINT'

SCRIPTWRITER: IF Q5='YES' FOR TV ONLY AND NOT FLAGGED AS 'BUNDLE COMPLAINT' **CLOSE**

ASK IF CODE Q5.1 'A SINGLE COMPLAINT ABOUT THE PROVIDER OF A BUNDLE'

Q5.1.2 Which specific service was this complaint regarding?

[SHOW ONLY THOSE CODED AT Q5]

Mobile Phone
 Landline Phone
 Fixed Broadband
 Mobile Broadband
 Pay TV

ASK ALL
 ASK FOR EACH COMPLAINT

QC7 When approximately was your initial complaint made to your provider?
 By this we mean when did you first contact your provider to make the complaint.

GRID
 MONTH—YEAR—
 Don't know

SHOW ONLY THOSE CODED Q5/Q5.1.2

Mobile phone service provider
 Landline phone service provider
 Fixed broadband service provider
 Mobile Broadband
 Pay TV

ASK ALL
 ASK FOR EACH COMPLAINT

Q6 Have any of these complaints taken 8 or more weeks to resolve?
 By this we mean were you still discussing the issue with your provider 8 weeks after you first contacted them about it?
 Please select one answer for each type of provider

[GRID]

Yes

No

SHOW ONLY THOSE CODED IN Q5 / Q5.1.2

Mobile phone service provider

Landline phone service provider

Fixed broadband service provider

Mobile Broadband

Pay TV

ASK ALL FOR EACH COMPLAINT

QC2c Did you receive acknowledgment of this complaint either over the phone or in writing (email, letter, online help assistant)?

Over the phone

By email

By letter

By an online help assistant

Complaint was acknowledged but I can't remember how

No acknowledgment of complaint

Not sure

SCREEN: In this survey we want to ask questions about complaints you have made to or about your communications provider. You **may** find it useful to have any relevant correspondence to hand to aid your answers. **However** you will still be able to complete the survey without this if it is not readily available.

SHOW ALL

The Alternative Dispute Resolution scheme is made up of two bodies (the Ombudsman service, formerly Otelo, and CISAS) that have been approved by Ofcom to provide services to people whose complaints to communications services providers cannot be resolved satisfactorily.

The scheme is free to use.

Q7 Were you aware of this scheme before now?

Please select one answer

Yes

No

ASK IF CODED 'YES' AT Q7.

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

Please select one answer

Informed verbally by my service provider

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

Read about it on my bill from my service provider

Found out about it on my service provider's website

Through other information available through my service provider

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

Through someone else - a friend, relative or colleague

Other (specify)

Don't know

ASK ALL EXCEPT Q7=NO

ASK FOR EACH COMPLAINT

QC3.1 Did you receive written notification from your provider informing you about your right to apply to an ADR scheme in any of the following ways?

A written notification informing you of your right to apply to ADR because your complaint had lasted longer than 8 weeks.

A written notification informing you of your right to apply to ADR because your complaint had reached a point of deadlock

A written notification informing you of your right to apply to ADR, but you can't remember the exact details

You do not recall receiving a written notification from your provider informing you about your right apply to ADR

No, you definitely did not receive a written notification

Don't know

ASK IF QC3.1 = 1-3

ASK FOR EACH COMPLAINT

QC3.2 Approximately how long after making the initial complaint did you receive the written notification informing you about ADR schemes?

SHOW ALL OPTIONS FOR COMPLAINTS WHEN Q6=YES

SHOW ONLY OPTIONS 1-3 FOR COMPLAINTS WHEN Q6=NO

Less than 4 weeks

Between 4-6 weeks

Between 6-8 weeks

Between 8-12 weeks

Over 12 weeks

Don't know

SHOW ALL

A deadlock letter is a letter or email from a provider to a complainant explaining that their complaint is considered deadlocked.

ASK FOR EACH COMPLAINT

QDL1 Did you at any point request a deadlock letter from your service provider?

Yes

No

Don't know

ASK FOR EACH COMPLAINT WHERE QDL1=YES, EXCEPT WHERE QC3.1= 2 (WHERE QC3.1=2 FORCE YES)

QDL2 Did you receive a deadlock letter from your service provider?

Yes
No
Don't know

ASK ALL EXCEPT Q7=NO

ASK SEPARATELY FOR EACH -COMPLAINT

Q9 For any of these complaints with your provider, did you submit an application to have the complaint considered by the Alternative Dispute Resolution scheme provided by the Ombudsman service (previously known as Otelo) or CISAS?
Please select one answer for each type of provider

[GRID]

Yes - I submitted an application to the Ombudsman service (previously known as Otelo)
Yes - I submitted an application to CISAS
Yes - I submitted an application to ADR scheme but I'm not sure who provided it
No
Don't know

Mobile phone service provider
Landline phone service provider
Fixed broadband service provider
Mobile Broadband
Pay TV

ASK IF CODED 'YES' AT Q9. ASK SEPARATELY FOR EACH COMPLAINT CODED Q9 YES

Q9.1 Was your ADR application accepted or rejected? By 'accepted' we mean that the application was accepted by the ADR scheme, not whether the complaint was ultimately upheld or not.

Accepted
Rejected
Don't know

ASK IF CODED 'ACCEPTED' AT Q9.1. ASK SEPARATELY FOR EACH COMPLAINT

Q9.2 When your ADR application was accepted did you proceed with this complaint via the ADR scheme with either the Ombudsman service (previously known as Otelo) or CISAS?

Yes
No
Don't Know

RESPONDENTS SHOULD BE ASKED ABOUT ONE COMPLAINT ONLY.

COMPLAINT TO BE CHOSEN BY THIS HIERARCHY

WHEN RESPONDENT HAS TWO OR MORE COMPLAINTS AT THE SAME HIERARCHICAL LEVEL, CHOOSE THE MOST RECENT (QC7=MOST RECENT)

Hierarchy:

1. ADR Users, complaint >8 weeks (Q6=YES, Q9.2=YES)
2. ADR Users, complaint <8 weeks (Q6=NO, Q9.2=YES)
3. Accepted to ADR, did not proceed, complaint >8 weeks (Q6=YES, Q9.2=NO or DK)
4. Accepted to ADR, did not proceed, complaint <8 weeks (Q6=NO, Q9.2=NO or DK)
5. Not accepted to ADR, complaint >8weeks (Q6=YES, Q9.1=NO or DK)
6. Not accepted to ADR, complaint <8weeks (Q6=NO, Q9.1=NO or DK)
7. Didn't apply to ADR, complaint >8 weeks (Q6=YES, Q9=NO or DK)
8. Didn't apply to ADR, complaint <8 weeks (Q6=NO, QC3.1=1-3, Q9=NO or DK)
9. Complaint >8 weeks, didn't receive letter (Q6=YES, Q3.1=NO or DK)
10. Complaint >8weeks, not aware of ADR (Q6=YES, Q7=NO)
11. Complaint <8 weeks, didn't receive letter (Q6=NO, Q3.1=4-6) **[CLOSE]**
12. Complaint <8 weeks, not aware of ADR (Q6=NO, Q7=NO) **[CLOSE]**

NATURAL FALLOUT WILL BE USED TO REFLECT INCIDENCE OF COMPLAINTS BY PROVIDER TYPE

SCREEN: This survey would now like to focus on just one complaint. In your case this would be the complaint made to [INSERT COMMS PROVIDER], [INSERT DATE]

This is the complaint [INSERT COMPLAINT LEVEL eg which went to ADR/ for which you received a letter referring you to ADR/ which lasted more than eight weeks]

ASK ALL

Q10 What was the nature of this complaint to your (INSERT COMMUNICATIONS PROVIDER)?

Please select all that apply

Mobile

- Put on the wrong tariff or package
- Phone bill is wrong / over-charging
- Inclusive or "free" calls not properly credited
- Costs of international and roaming calls
- Charged for cancelled services
- Pre-pay credit lost or not credited to card
- Unexplained premium rate numbers on bill

Charging for ringtones subscription or text messages
 Text or voice mails being delivered late
 Emails being delivered late
 Poor quality data services, WAP or 3G
 Poor quality 4G services
 Cost of UK data services
 Cost of data services while abroad
 Mis-selling of mobile phone services
 Unable to keep phone number when switching supplier
 Scam text messages
 Abusive or threatening calls or text messages
 Poor reception/coverage
 Problems with call not being connected or disconnected during call
 Poor or inaccurate advice from staff
 Rude or unhelpful service staff
 Problem with handset
 Phone contract is unfair
 Time taken to speak to someone in customer service
 Charge for not paying by direct debit
 Other (specify)

Landline

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

Fixed/Mobile broadband

Charged for cancelled service
 Overcharged or inaccurate bill from service provider
 Unexplained premium rate call on bill
 Could not install internet service properly
 Problems with Voice over internet/broadband (VOIP)
 Unable to get broadband or switch supplier as there is tag/marker/presence/ISP online
 Unable to get broadband - other

Unable to switch internet service provider - other
 Connection speed too low
 Account suspended
 Caps on usage (hours of use or amount downloaded).
 Quality of service - other
 Unwanted emails/spam
 Offensive internet content
 Rude or unhelpful sales staff
 Poor or inaccurate advice from staff
 Contract is unfair
 Time taken to speak to someone in customer service
 Charge for not paying by direct debit
 Other (specify)

PayTV

Put on the wrong tariff or package
 Charged for cancelled service
 Overcharged or inaccurate bill from service provider
 Account suspended
 Poor TV service quality
 Rude or unhelpful sales staff
 Poor or inaccurate advice from staff
 Contract is unfair
 Time taken to repair a fault
 Time taken to speak to someone in customer service
 Charge for not paying by direct debit
 Problem with set-top box
 Service interruption
 Other (specify)

Q11 Please select the (INSERT COMMUNICATION PROVIDER) involved in this complaint.
Please select one answer

Mobile

3
 BT Mobile
 EE/ Everything Everywhere
 Giffgaff
 O2
 Onetel
 Orange
 TalkTalk
 Tesco
 T-mobile
 Virgin
 Vodafone
 Other (specify)

Landline

Alpha Telecom
 Be

BT
Chess
Direct Save Telecom
Plusnet
Primus
Sky Talk
TalkTalk
Virgin
Other (specify)

Fixed broadband/ Mobile broadband

AOL
Be
BT
BT Broadband
EE/ Everything Everywhere
O2
Orange
Plusnet
Primus
Sky
T-Mobile
TalkTalk
Virgin
Other (specify)

Pay TV

BT
Sky
TalkTalk
Top UP TV
Virgin
Other (Please specify)

ASK ALL.

QC2 Which of these did you first use to make this complaint to [INSERT NAME OF PROVIDER FROM Q11]?

GRID

SINGLE CODE

Telephone
E-mail
Letter
Other (Please specify)
Don't know

ASK ALL EXCEPT QC2=Don't Know

QC2b Which others methods did you use, if any, to contact [INSERT NAME OF PROVIDER FROM Q11] during the complaint process?

GRID

MULTI CODE

Telephone

E-mail

Letter

Other (Please specify)

None

Don't know

ASK ALL

- Q12 What is the status of this complaint with **[INSERT NAME OF PROVIDER FROM Q11]**?
Please select one answer

Complaint process completed *ie you have received confirmation that no further action will be taken. This does not necessarily mean a satisfactory outcome has been achieved*
Partly completed *ie. The complaint is currently being investigated by the provider*
Not completed at all *ie. Action has yet to be taken that will bring a resolution*
Don't know

ASK ALL WHO CODED Q12 'COMPLETELY RESOLVED' OR 'PARTLY RESOLVED'

- QF1 To what extent do you think your complaint was resolved fairly by your provider?
Please select one answer on a scale of 1-7 where 1 is 'Very unfairly' and 7 is 'Very fairly'

ASK ALL

Q18 Overall, how satisfied were you with the final outcome of this complaint to **[INSERT NAME OF PROVIDER FROM Q11]**?

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

ASK ALL

Q19 And how easy was it to resolve this complaint with **[INSERT NAME OF PROVIDER FROM Q11]**?

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

ASK ALL

- Q20a And how easy was it to get **[INSERT NAME OF PROVIDER FROM Q11]** to recognise that you were making a complaint (i.e. that they should take steps to address your dissatisfaction)?

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

ASK ALL

- Q20b And how satisfied were you with **[INSERT NAME OF PROVIDER FROM Q11]** with regard to them making it clear how this complaint would be handled (including when you should expect a response and what to do if you remained dissatisfied)?

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

ASK ALL

- Q21 And how satisfied were you with the time it took to resolve the complaint you had with **[INSERT NAME OF PROVIDER FROM Q11]** on this occasion?
Please select one answer on a scale of 1-7 where 1 is 'Not at all satisfied' and 7 is 'Very satisfied'.

ASK IF CODED 'YES' AT Q7.

- Q14 You mentioned earlier that you were aware of the Alternative Dispute Resolution scheme before now. Were you aware of this scheme when you made this complaint to **[INSERT NAME OF PROVIDER FROM Q11]**?
Please select one answer

Yes, I was aware before I made my complaint

No, I became aware during the complaint

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

Don't know

ASK IF Q14= 'YES' OR 'NO, I BECAME AWARE OF ADR DURING THE COMPLAINT' AND COMPLAINT=HIERARCHY LEVEL 9, 8, 7, 4 OR 3

- Q15 Why did you not use the Alternative Dispute Resolution scheme to resolve your complaint with **[INSERT NAME OF PROVIDER FROM Q11]**?

ASK IF Q7='NO' OR 'Q14='NO'

- Q17 How would you have liked **[INSERT NAME OF PROVIDER FROM Q11]** to inform you about the point at which you were eligible to submit an application to the Alternative Dispute Resolution schemes?
Please select one answer

On my bill

By SMS / text message

By phone

By letter

By email

In the terms and conditions for my service

Other (specify)

Don't know

ASK IF CODED 'YES' AT Q9.2.

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

ASK ALL

- Q23 Overall, how much time did you spend actively pursuing this complaint with **[INSERT NAME OF PROVIDER FROM Q11]**, i.e. writing letters, emails, making phone calls etc. until the complaint was resolved (or up until now if the complaint remains unresolved)?
Please enter hours and minutes in the box below

ASK ALL

QC5.1 Did you take any time away from work / carer commitments in order to deal with this complaint?

Work
Carer
No
Don't know

ASK IF CODED QC5.1 'WORK' or 'CARER'. ASK FOR EACH RESPONSE SEPERATELY

QC5.2 How much time did you take away from (INSERT CODE QC5.1)
Please enter hours and minutes in the box below

ASK ALL

QCC On how many separate occasions did you contact **[INSERT NAME OF PROVIDER FROM Q11]** regarding this complaint?
Please enter the number of separate occasion in the box below

SCRIPTWRITER ALLOW 1-99
ALLOW DK

ASK ALL EMPLOYED Q1=1-2
QC6 When were you dealing with this complaint?

MULTICODE

During your weekend or equivalent regular days off from work
During vacation/holiday/leave
Before work
During working hours
Lunch hour or other work breaks
After work
Don't know

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

ASK ALL
Q25 We are interested in how you felt during the complaint process. How worried, if at all, did you feel while trying to resolve the complaint?
Please select one answer on a scale of 1-7 where 1 is 'Not at all worried' and 7 is 'Very worried'.

ASK ALL
Q26 How stressful, if at all, did you find trying to resolve the complaint?
Please select one answer on a scale of 1-7 where 1 is 'Not at all stressful' and 7 is 'Very stressful'.

ASK ALL
 Q27 How angry, if at all, did you feel while trying to resolve the complaint?
 Please select one answer on a scale of 1-7 where 1 is 'Not at all angry' and 7 is 'Very angry'.

ASK ALL
 Q28 Which of the following statements best describes what you have done (or plan to do) about your relationship with **[INSERT NAME OF PROVIDER FROM Q11]**?
 Please select one answer

ASK ALL
 I have already switched to another provider because of this complaint
 I am planning to switch to another provider because of this complaint
 I am planning to switch to another provider but for other reasons
 I have no plans to switch provider
 Other (specify)
 Don't know

ASK ALL
 D1 Which of the following regions/ nations do you live in?

East of England (East Anglia)
 Greater London
 East Midlands
 North East
 North West
 Northern Ireland
 Scotland
 South East
 South West
 Wales
 West Midlands
 East Midlands
 Yorkshire and the Humber
 Don't know

ASK ALL
 D2 To which of the following groups do you consider you belong? CODE ONE ONLY

White
 British
 English
 Scottish
 Welsh
 Irish
 Any other White background (SPECIFY)
Mixed / multiple ethnic groups
 White and Black Caribbean
 White and Black African
 White and Asian
 Any other mixed background (SPECIFY)
Asian / Asian British
 Indian
 Pakistani

Bangladeshi
 Any other Asian background (SPECIFY)
Black or Black British
 Caribbean
 African
 Any other Black background (SPECIFY)
Chinese or Other ethnic group
 Chinese
 Any other background (SPECIFY)

Refused

ASK ALL

D4 Which qualifications do you have, starting with the highest qualifications?

CODE UP TO 3 QUALIFICATIONS

None/no qualifications
 GCSE D-G/CSE below Grade 1/GNVQ Foundation
 GCSE A*-C/GNVQ Intermediate/GCE 'O' Level/CSE Grade 1/School Certificate of
 Matriculation
 GCE 'A' Level/GNVQ Advanced
 SCE Standard (4-7)/Ordinary (below C)
 SCE Standard (1-3)/Ordinary (A-C) or SLC/SUPE Lower
 SCE Higher or SLC/SUPE Higher
 Certificate of Sixth Year Studies
 NVQ level 1 (or SNVQ1)
 NVQ level 2 (or SNVQ 2)
 NVQ level 3 (or SNVQ 3) or ONC/OND (or SNC/SND)
 NVQ level 4 (or SNVQ 4) or HNC/HND (or SHNC/SHND)
 University Certificate/Diploma (Not Degree)
 SCOTVEC National Certificate
 SCOTBEC/SCOTEC Certificate/Diploma
 Clerical/commercial (eg typing or book-keeping)
 Nursing (eg SCM, RGN, SRN, SEN)
 Teaching
 Other Professional (eg law, medicine)
 University or CNAA Degree
 Masters or PhD Degree
 Completion of Trade Apprenticeship
 Professional qualification without sitting exam
 Other (SPECIFY)
 Don't know

Appendix 2: Omnibus questionnaire

1055 short interviews were conducted via GfK's weekly nationally representative F2F omnibus.

The questionnaire

- ASK ALL / MULTI-CODE
- Q1 Have you, personally made a complaint about any of the following services in the last year? This could be a current, on-going complaint or one that has already been resolved, and can be either for services you use personally or those you use in a business capacity.
- This does not include complaints made about the provider themselves, for example customer service or billing issues.
- Add if necessary - A complaint is defined as an expression of dissatisfaction made to a service provider related to its products or services, or the complaints-handling process itself, where a response or resolution is expected.
- Mobile phone service
Landline phone service
Fixed broadband service
Postal service
Gas service
Electricity service
Financial services
None of these
- ASK ALL / MULTI-CODE
- Q1a And, have you personally made a complaint specifically about your **provider** of any of the following services? i.e. a customer service, billing, or other issue that is not directly related to the actual product they provide.
- INTERVIEWER INSTRUCTION: IF COMPLAINT WAS ABOUT PROVIDER THAT PROVIDES MORE THAN ONE SERVICE THEN ONLY STATE CODE 1
- This could be a current, on-going complaint or one that has already been resolved, and can be either for services you use personally or those you use in a business capacity.
- Provider of multiple services/bundle provider e.g. landline and fixed broadband
Mobile phone service provider
Landline phone service provider
Fixed broadband service provider
Postal service provider
Gas service provider
Electricity service provider
Financial services provider
None of these
- IF CODED 'NONE OF THESE' AT Q1 & Q1a, SKIP TO Q4.
- ASK ALL WHO CODED MORE THAN ONE COMMUNICATIONS SERVICE AT Q1 1-4
- Q1b Were these complaints about your communications services a single complaint about a bundle of these services, or were they separate complaints?

Single complaint about a bundle of services
More than one complaint

ASK FOR ALL COMPLAINTS CODED AT Q1 & Q1A/ SINGLE CODE FOR EACH COMPLAINT

Q1d Thinking about the most recent complaint you made about each service or provider. Was this complaint about services used personally, those used in a business capacity, or both?

[GRID]
Services used personally
Services used in a business capacity
Both

Service – Q1

Mobile phone service
Landline phone service
Fixed broadband service
Gas service
Electricity service
Financial services

Service provider – Q1a

Provider of multiple services/bundle provider (e.g. landline and fixed broadband)
Mobile phone service provider
Landline phone service provider
Fixed broadband service provider
Gas service provider
Electricity service provider
Financial services provider

ASK FOR ALL COMPLAINTS CODED AT Q1 OR Q1a EXCEPT FOR POSTAL SERVICE / SINGLE CODE FOR EACH COMPLAINT

Q2 Thinking again about the most recent complaint you made about each service or provider. Did any of these take 8 weeks or more to resolve?
i.e. Were you still discussing the issue with your provider 8 weeks after you first contacted them about it? .

[GRID]
Yes
No

Service – Q1

Mobile phone service
Landline phone service
Fixed broadband service
Gas service
Electricity service
Financial services

Service provider – Q1a

Provider of multiple services/bundle provider (e.g. landline and fixed broadband)
Mobile phone service provider
Landline phone service provider

Fixed broadband service provider
 Gas service provider
 Electricity service provider
 Financial services provider

IF POSTAL SERVICE CODED AT Q1 OR Q1A AND 'NO' FOR ALL OTHER TYPES OF PROVIDER AT Q2, SKIP TO Q4.

ASK FOR POSTAL SERVICE IF CODED AT Q1 OR Q1a
 ASK Q3 FOR ALL TYPES OF COMPLAINT (EXCEPT POSTAL SERVICE)
 CODED 'YES' AT Q2 / SINGLE CODE FOR EACH COMPLAINT

Q3 Were any of your complaints with the [INSERT FROM Q1/Q1a/Q2 AS RELEVANT] referred to the ...

[GRID]
 Yes
 No
 Don't know

Alternative Dispute Resolution scheme such as Ombudsman services (previously known as Otelo) or CISAS [IF SELECTED MOBILE, LANDLINE, FIXED BROADBAND AT Q2]
 Postal Redress Service [IF SELECTED POSTAL SERVICE AT Q1]
 Energy Ombudsman [IF SELECTED GAS OR ELECTRICITY AT Q2]
 Financial Ombudsman Service [IF SELECTED FINANCIAL INSTITUTION AT Q2]

Service – Q1

Mobile phone service
 Landline phone service
 Fixed broadband service
 Gas service
 Electricity service
 Financial services

Service provider – Q1A

Provider of multiple services/bundle provider (e.g. landline and fixed broadband)
 Mobile phone service provider
 Landline phone service provider
 Fixed broadband service provider
 Gas service provider
 Electricity service provider
 Financial services provider

ASK Q3a FOR ALL COMPLAINTS REFERRED AT Q3/ SINGLE CODE FOR EACH REFERRAL

Q3a When was this?

[GRID]
 Within the last 3 months
 Between 3 and 6 months ago
 6 months to a year ago
 Don't know

Alternative Dispute Resolution scheme such as Ombudsman services (previously known as Otelo) or CISAS
 Postal Redress Service
 Energy Ombudsman

Financial Ombudsman Service

ASK Q3b FOR ALL COMPLAINTS REFERRED AT Q3/ SINGLE CODE FOR EACH REFERRAL

Q3b What is the current status of each referral?

[GRID]

Awaiting a response to application

The referral was rejected

The referral was approved and currently in process

The referral was approved and the process is complete

Don't know

Alternative Dispute Resolution scheme such as Ombudsman services (previously known as Otelo) or CISAS

Postal Redress Service

Energy Ombudsman

Financial Ombudsman Service

ASK ALL/ MULTIPLE CODE

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

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

Which of these official bodies have you previously heard of?

Ombudsman services (previously known as Otelo) or CISAS – these are the official dispute resolution schemes for mobile phone, landline phone and broadband services

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

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

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

None of these

ASK ALL EMPLOYED SINGLE CODE

Q5 What is the size of the company you work for?

1-10 employees

11-20 employees

21-50 employees

51-100 employees

101-250 employees

251-500 employees

500+ employees

Don't know