

# National Consumer Agency Survey Findings

Report by Amárach Research  
March 2008



national consumer agency

## Survey Findings

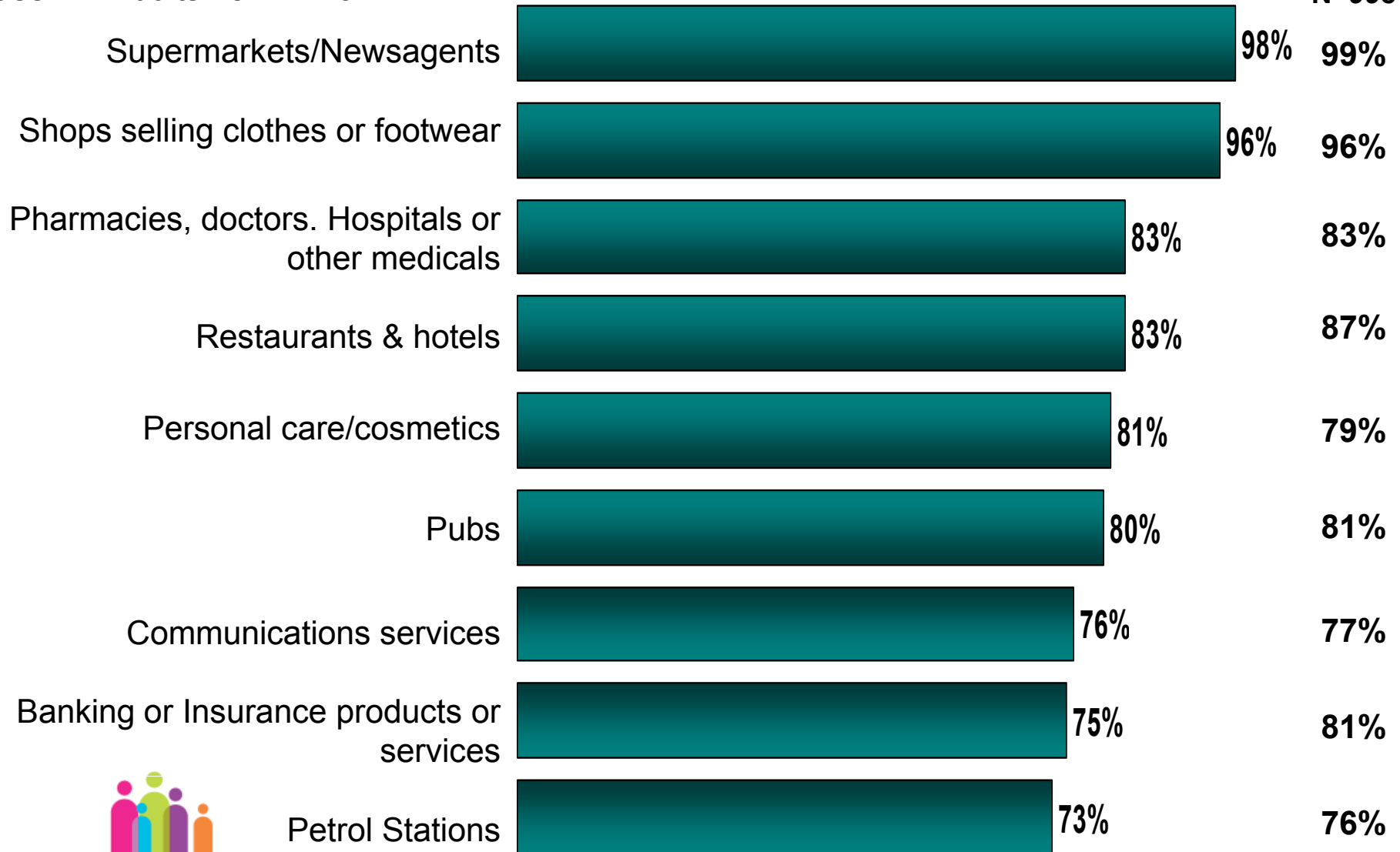
- The survey findings set out in this report are based on:
  - A nationally representative survey of approximately 1,000 adults, aged 15 – 74 across 101 sampling points in the Republic of Ireland conducted in April 2007
  - A second representative survey of approximately 1,000 adults, aged 15 – 74 across the same 101 sampling points conducted in December 2007
  
- The survey covers a range of consumer experiences in relation to:
  - incidence and nature of complaints
  - the online consumer experience
  - switching behaviour & intentions



# Repertoire of Purchase in Past 12 Months

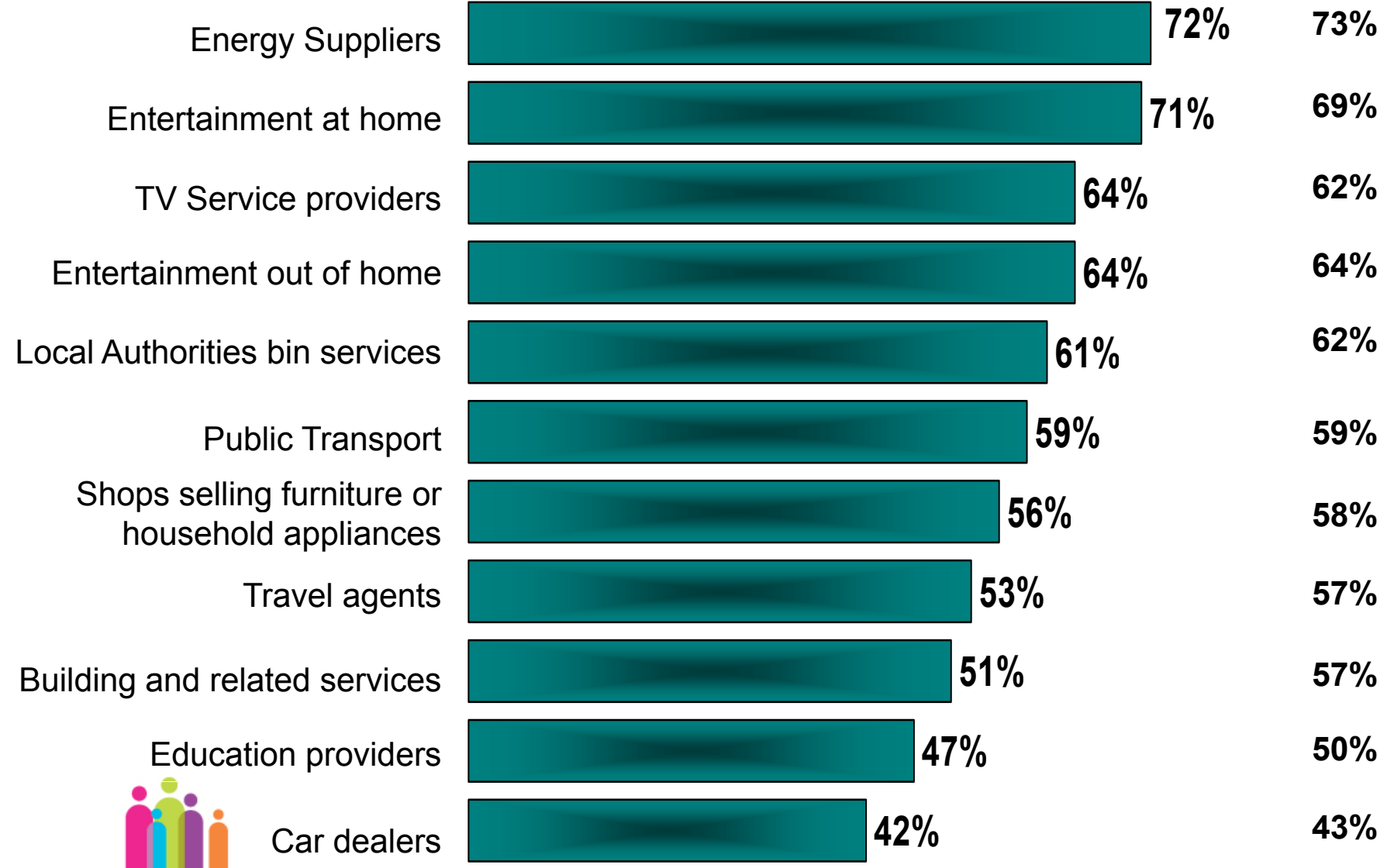
Base: All Adults 15+ N=1012

N=998



# Repertoire of Purchase in Past 12 Months 2

Base: All Adults 15+ N=1012

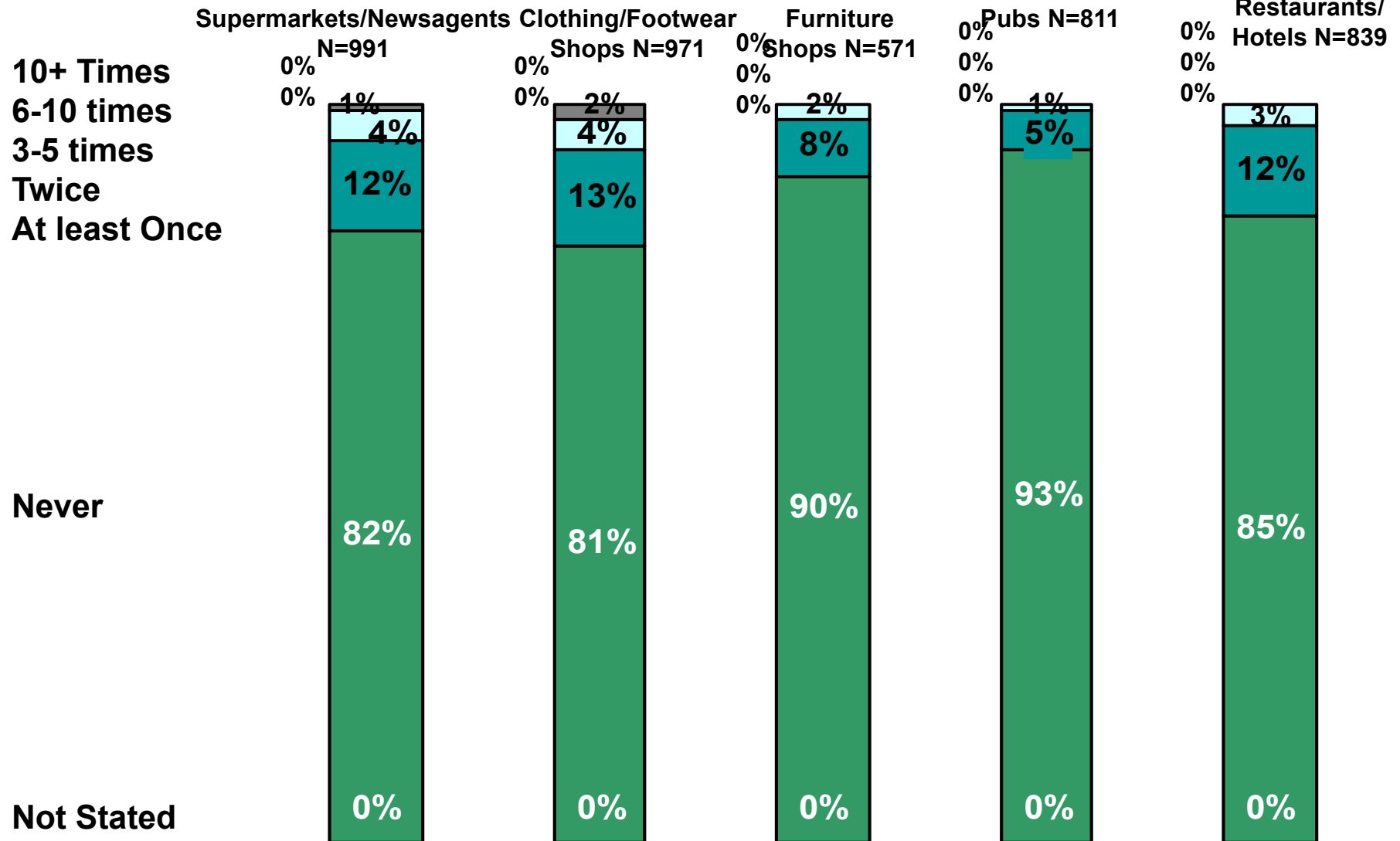


**Using the same categories we have measured  
the incidence of consumer complaints in relation to  
goods and services bought in past 12 months ...**



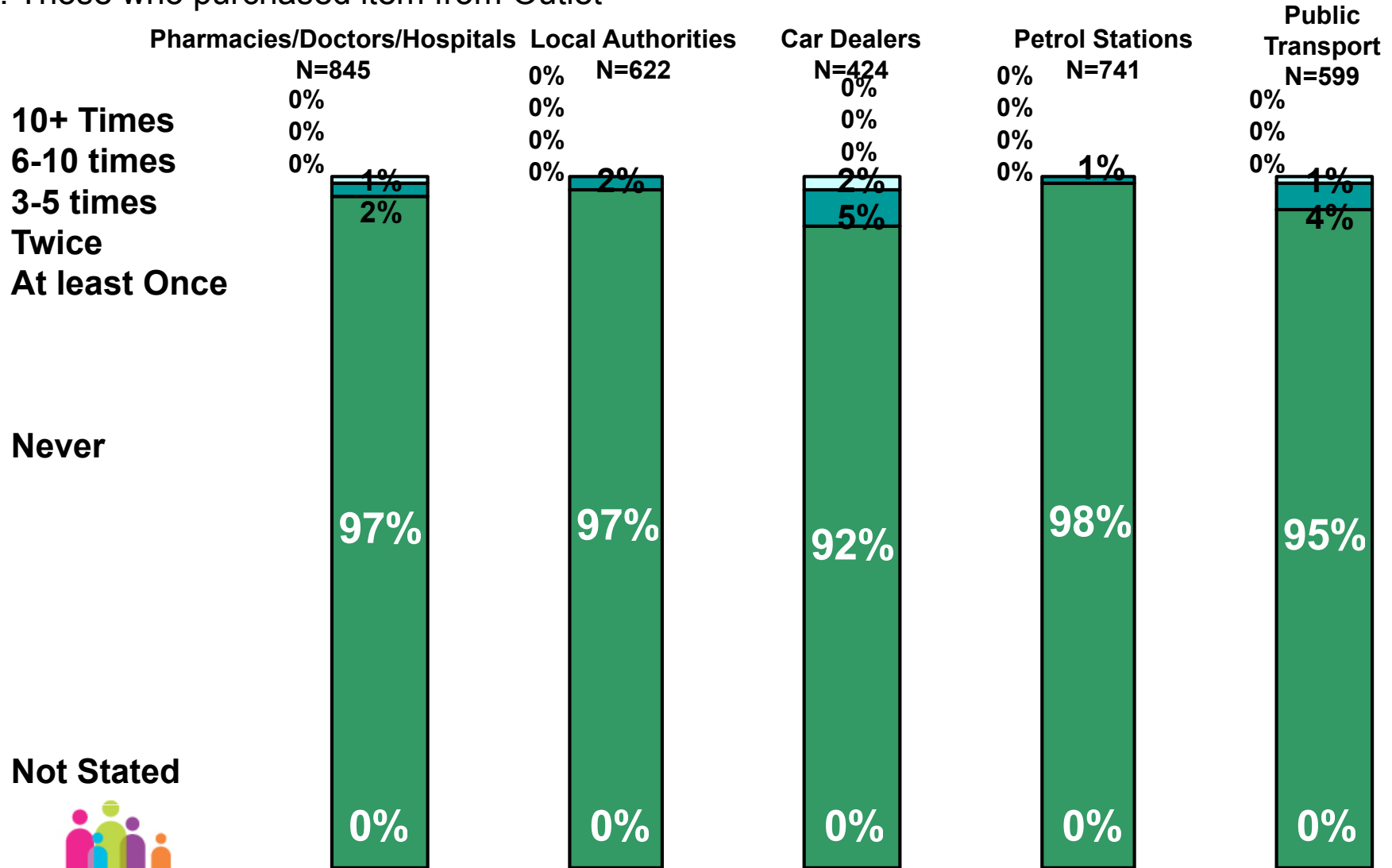
# Frequency of Complaining in Past 12 Months

Base: Those who purchased item from Outlet



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Base: Those who purchased item from Outlet

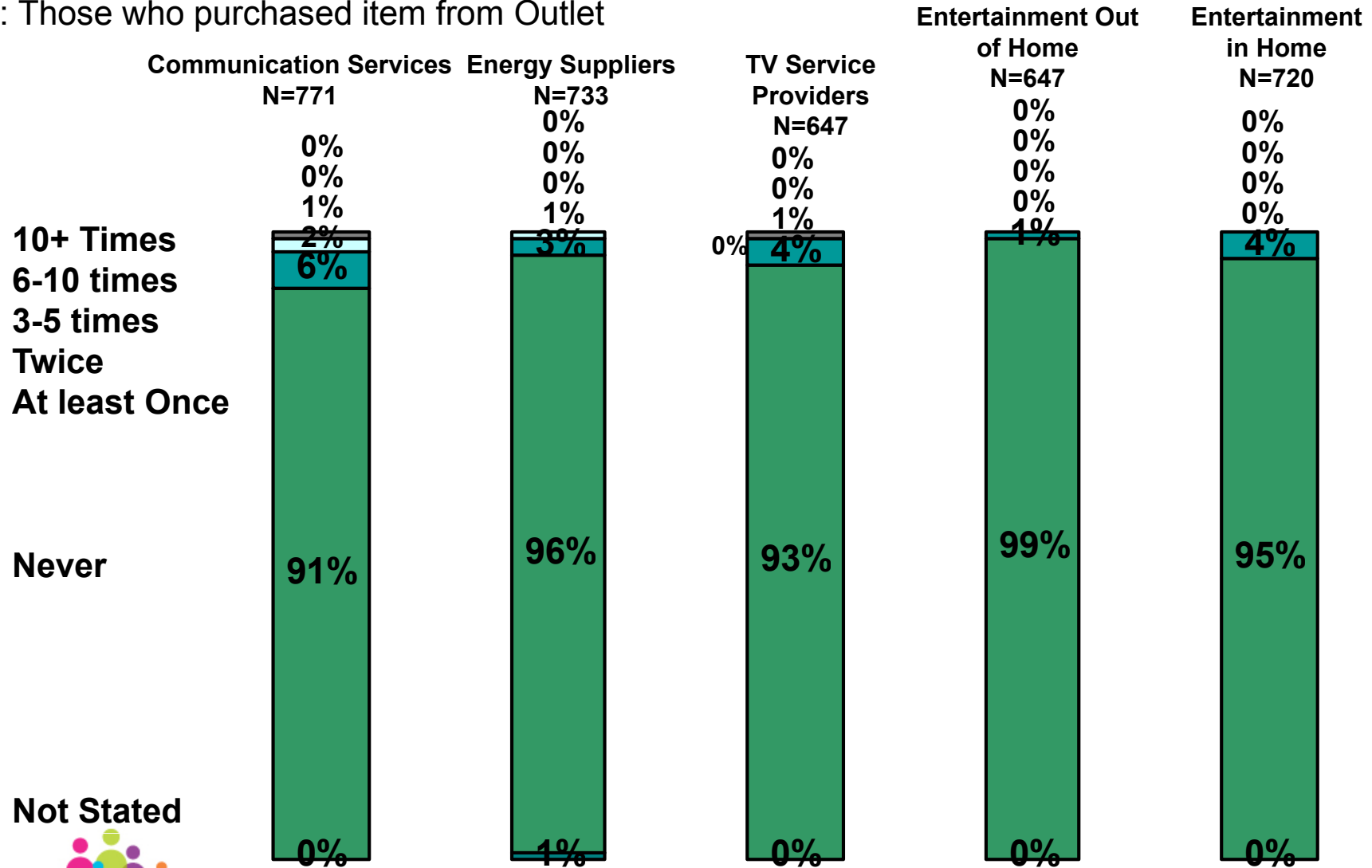


Not Stated



# Frequency of Complaining in Past 12 Months

Base: Those who purchased item from Outlet

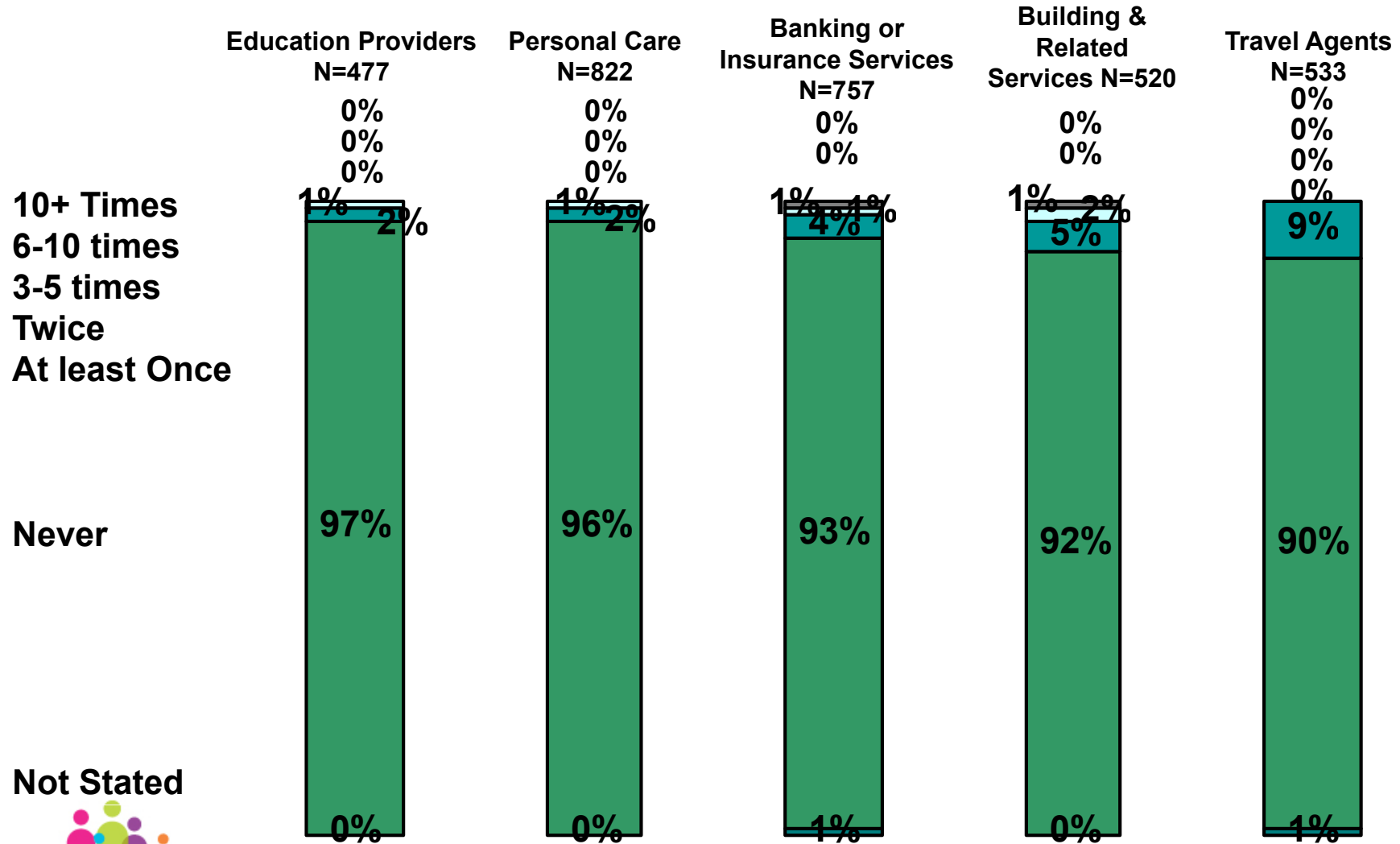


Not Stated



# Frequency of Complaining in Past 12 Months

Base: Those who purchased item from Outlet



Not Stated



	Sector	2007 Average% Any Complaints (among those shopping in each type of outlet)
1	Clothing & Footwear Retailers	20%
2	Supermarkets	17%
3	Restaurants & Hotels	13%
4	Furniture & Appliances Retailers	12%
5	Phone & Internet Companies	10%
6	Travel Agents	8%
7	Builders & Related Services	7%
8	Car Dealers	6%
9	Pubs	7%
10	Banking & Insurance Providers	6%

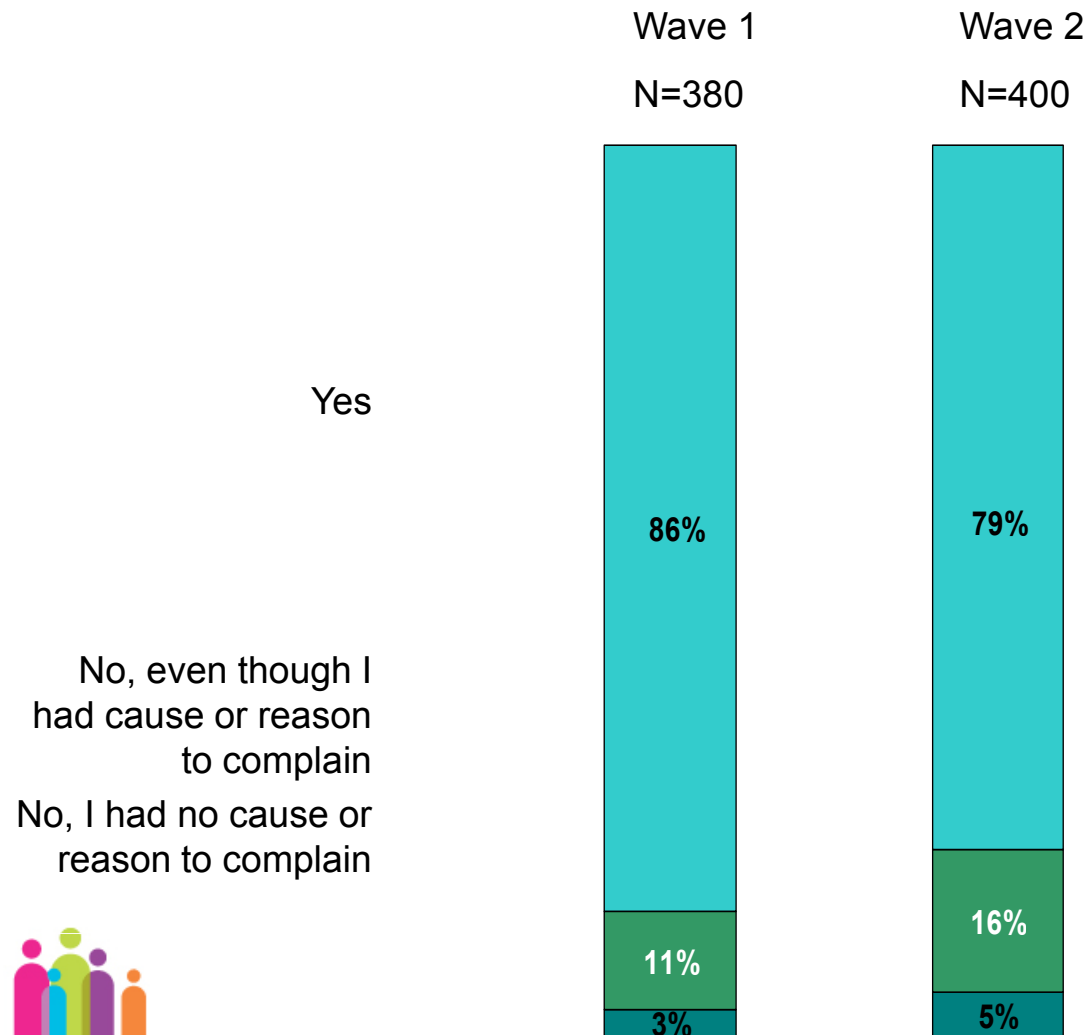


**We examined consumer attitudes to making complaints and the complaint making process ...**



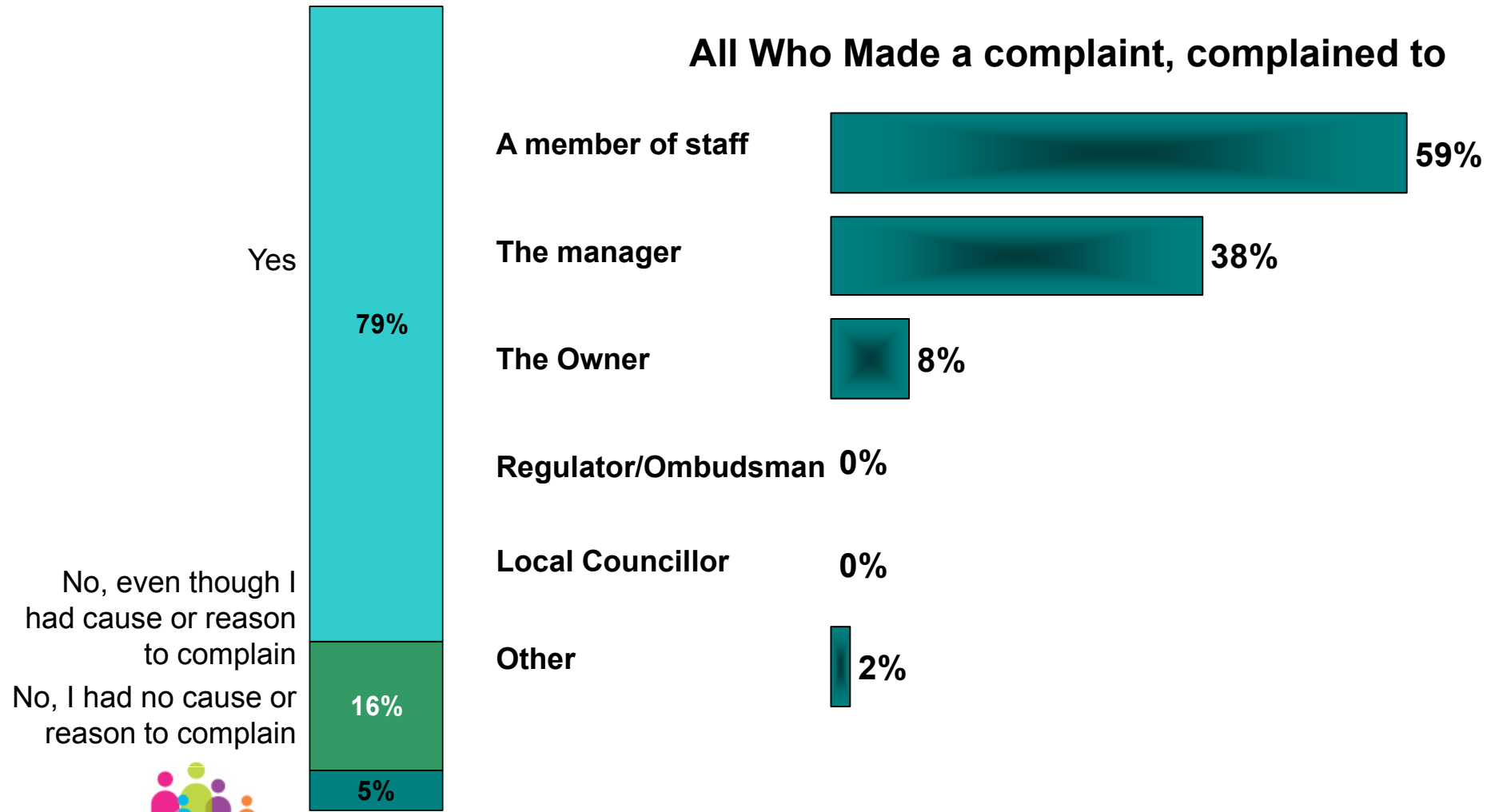
# Complaint Making Process

Base: All Who Had Cause or Reason to Complain in Past 12 Months



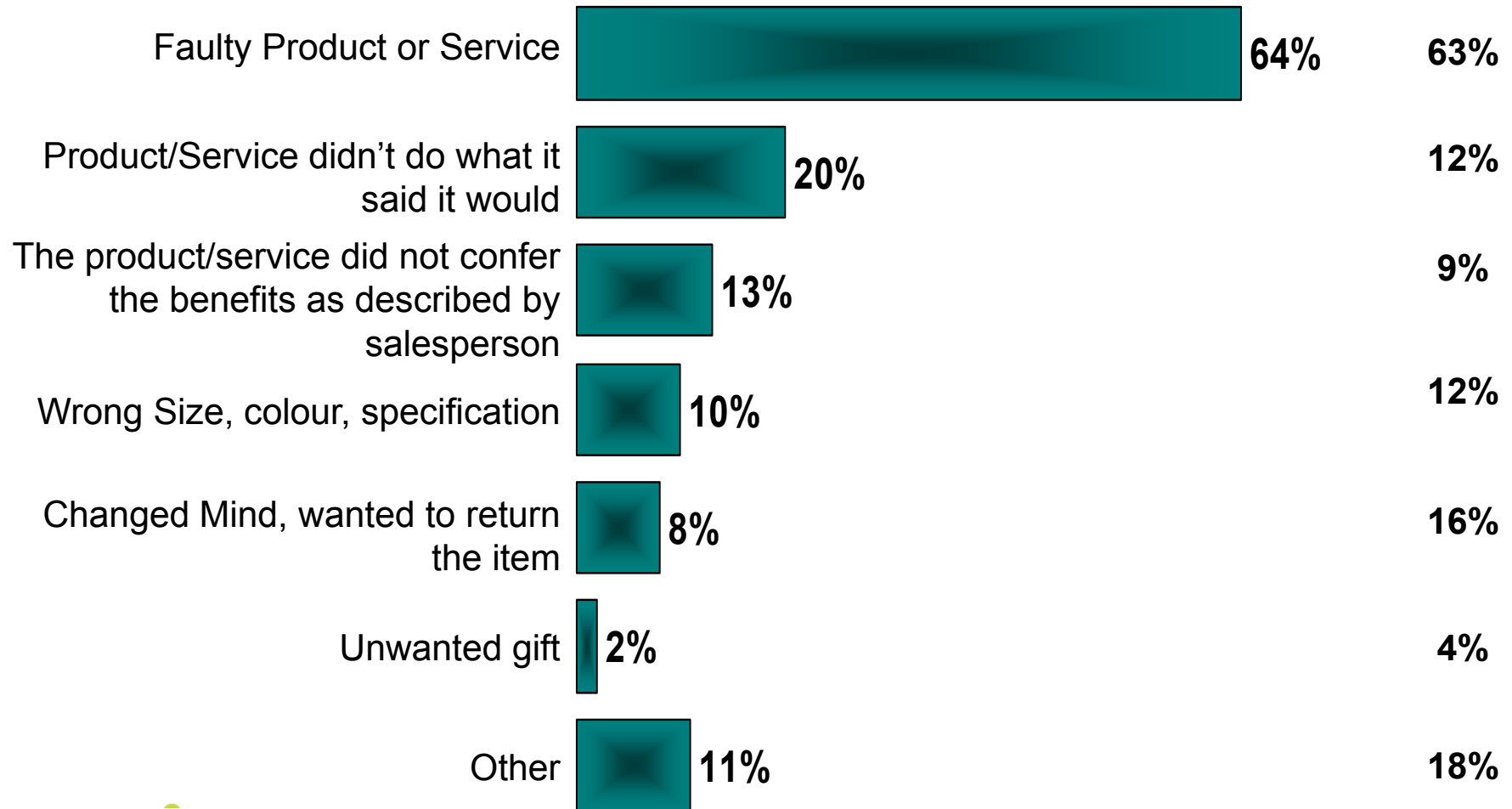
# Complaint Making Process

Base: All Who Had Cause or Reason to Complain in Past 12 Months N=315



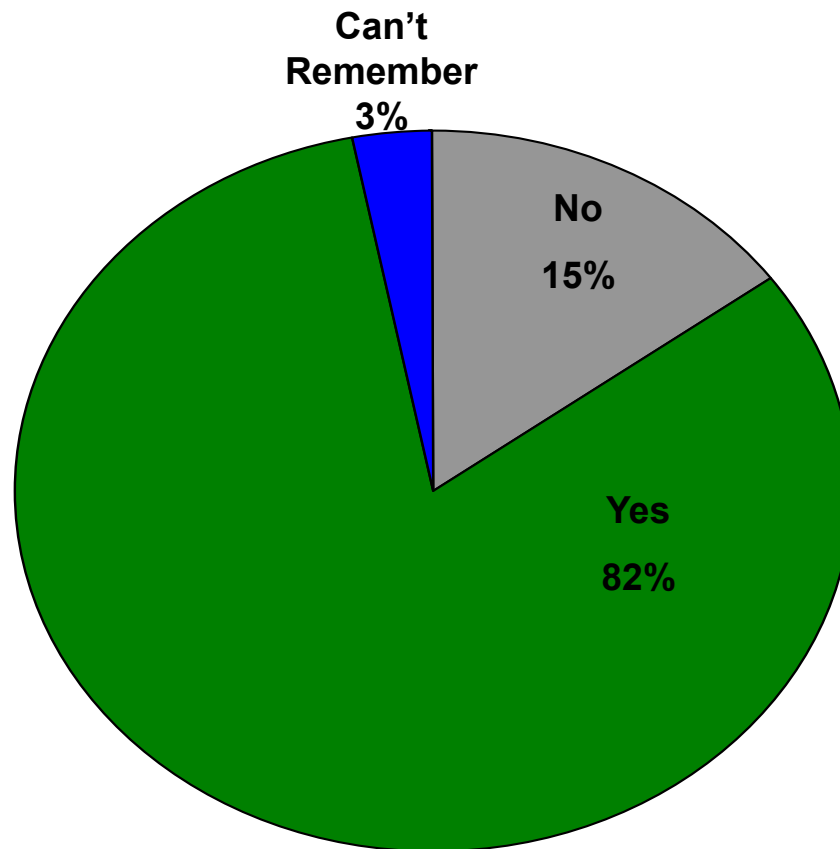
# Rationale for Complaining

Base: All Who Made a Complaint N=315



# Incidence of Returning Item

Base: All Who Made a Complaint N=315



Those who returned an item (82%) are marginally more likely to be female (85%), have a higher to middle social class background (84%) and live in Munster (90%).

Those who did not return an item (15%) are more likely to be male (18%). This group are likely to be either aged between 15-24 (16%) or 35-44 (17%) and are marginally more likely to be from a middle to lower social class background (17%) and to be living in Dublin (23%).

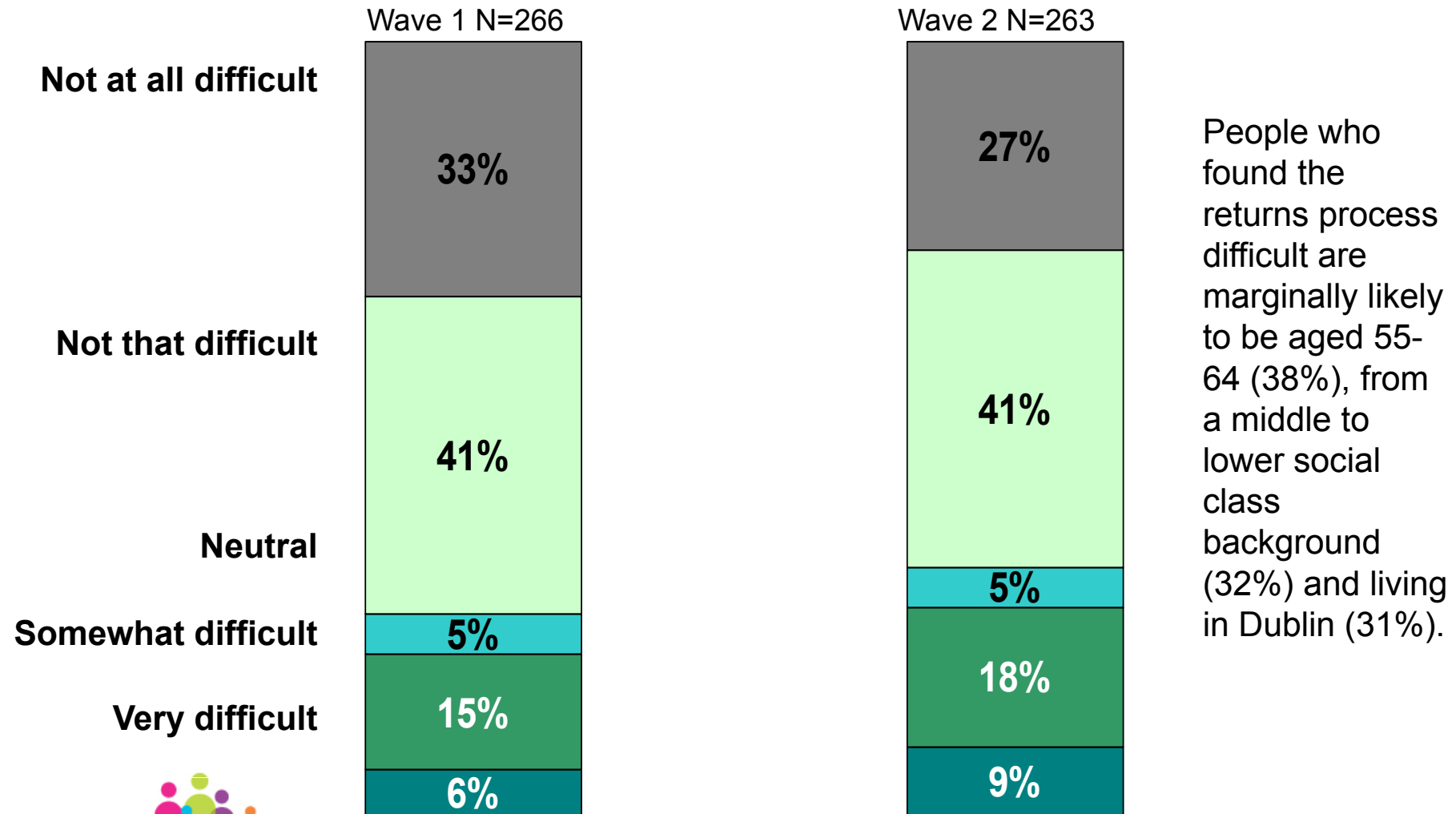


**This enabled us to assess individuals thoughts on the complaint making process in terms of degree of difficulty of making a complaint and type of difficulties encountered...**



# Returns Process

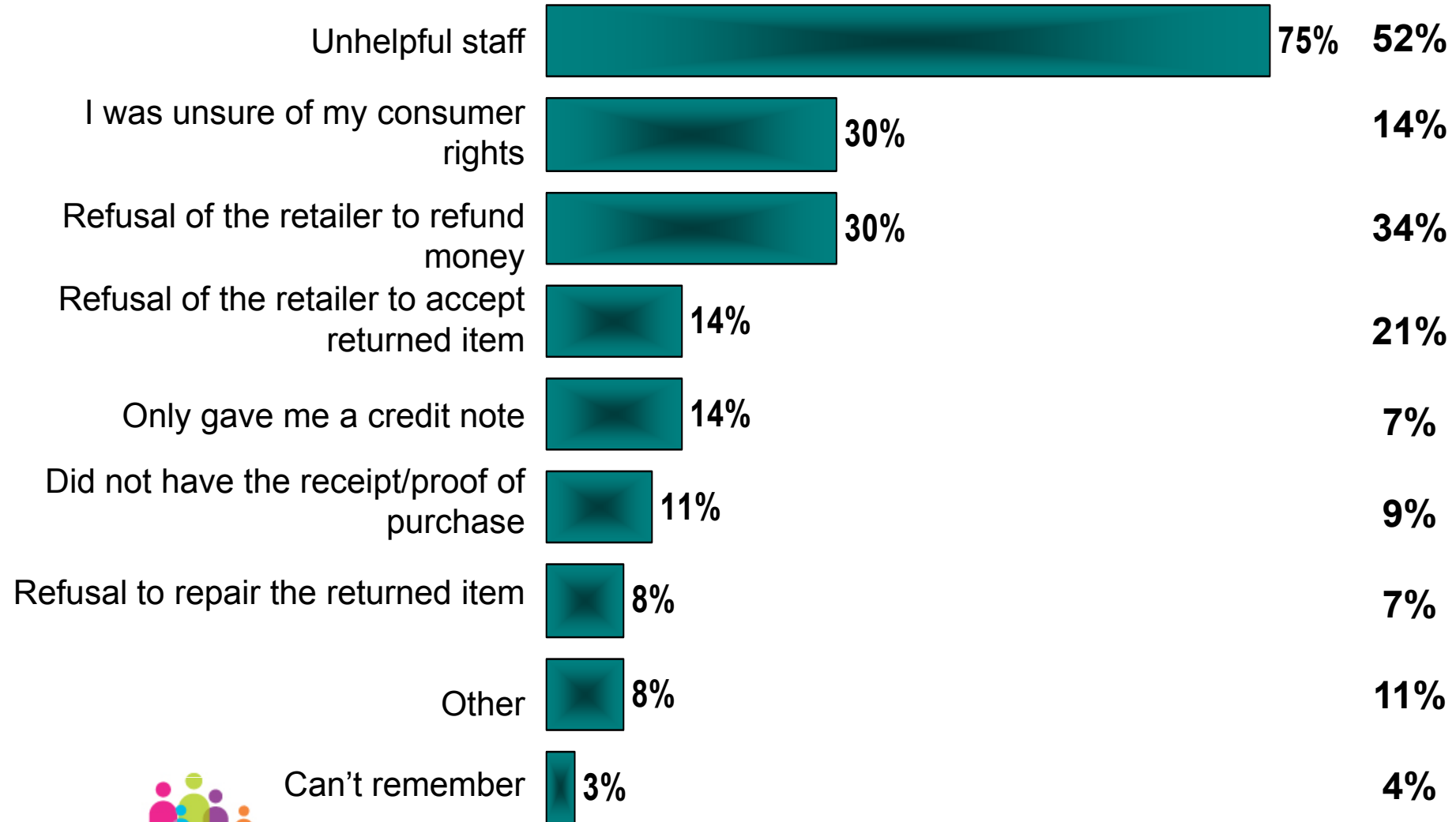
Base: All Who Returned an Item N=263



# Type of Difficulty Encountered

Base: All Who Found the Returns Process Difficult N=71\*

N=56



\* Please Note Small Base

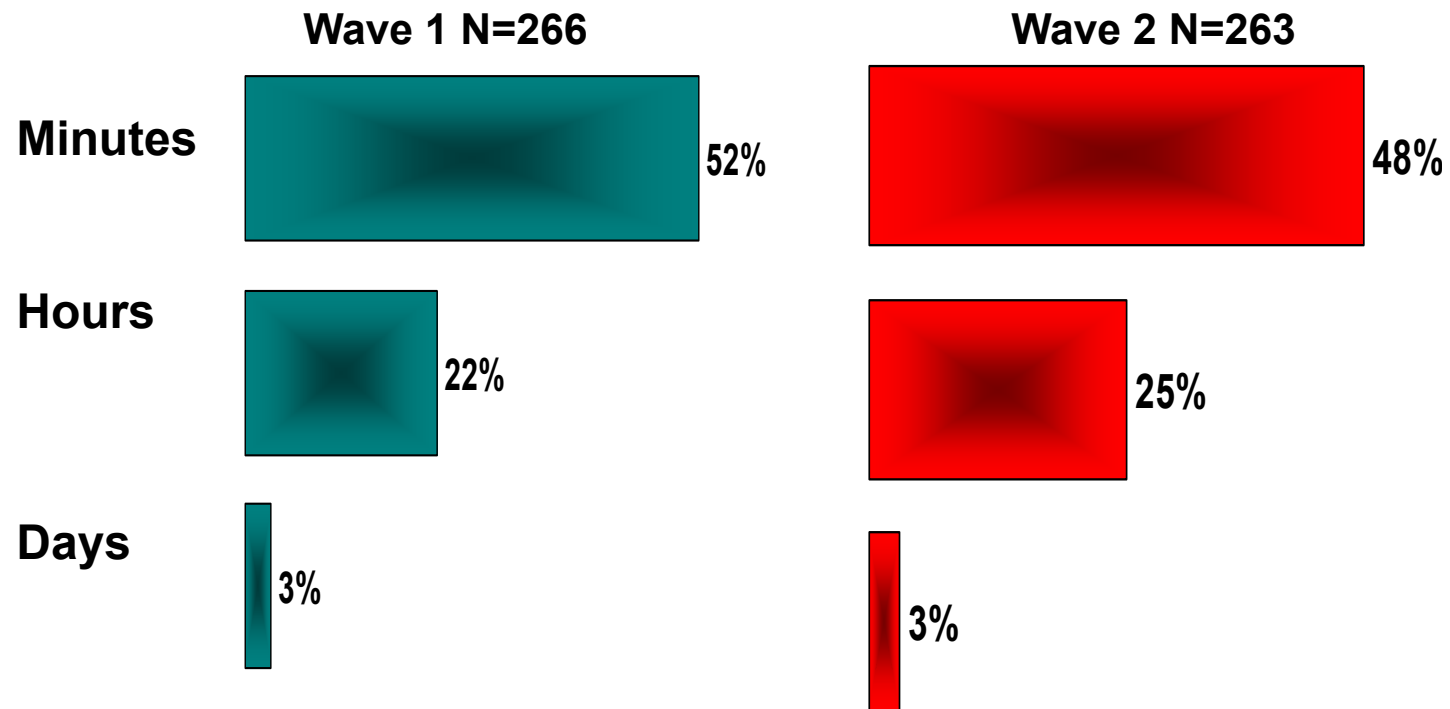


**We examined time expenditure involved in making a complaint ...**



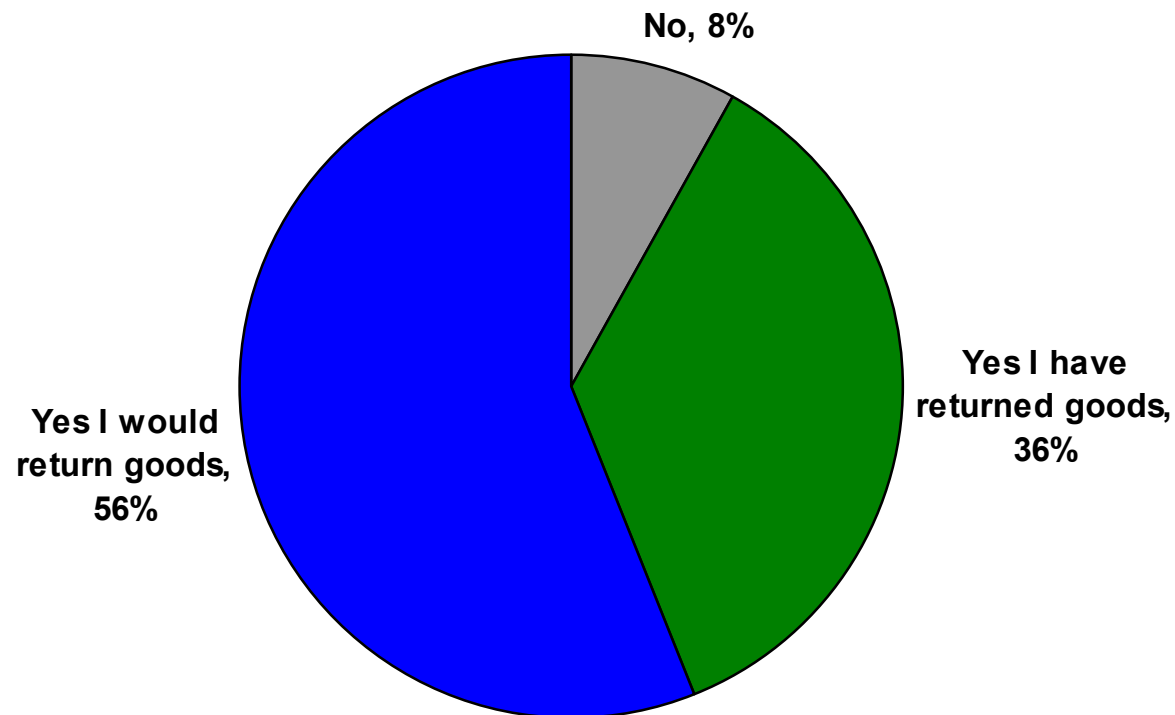
# Time Expenditure on Complaining

Base: All Who Returned an Item N=263



## Returning Items – Future Intentions

Base: All Who Returned an Item N=263

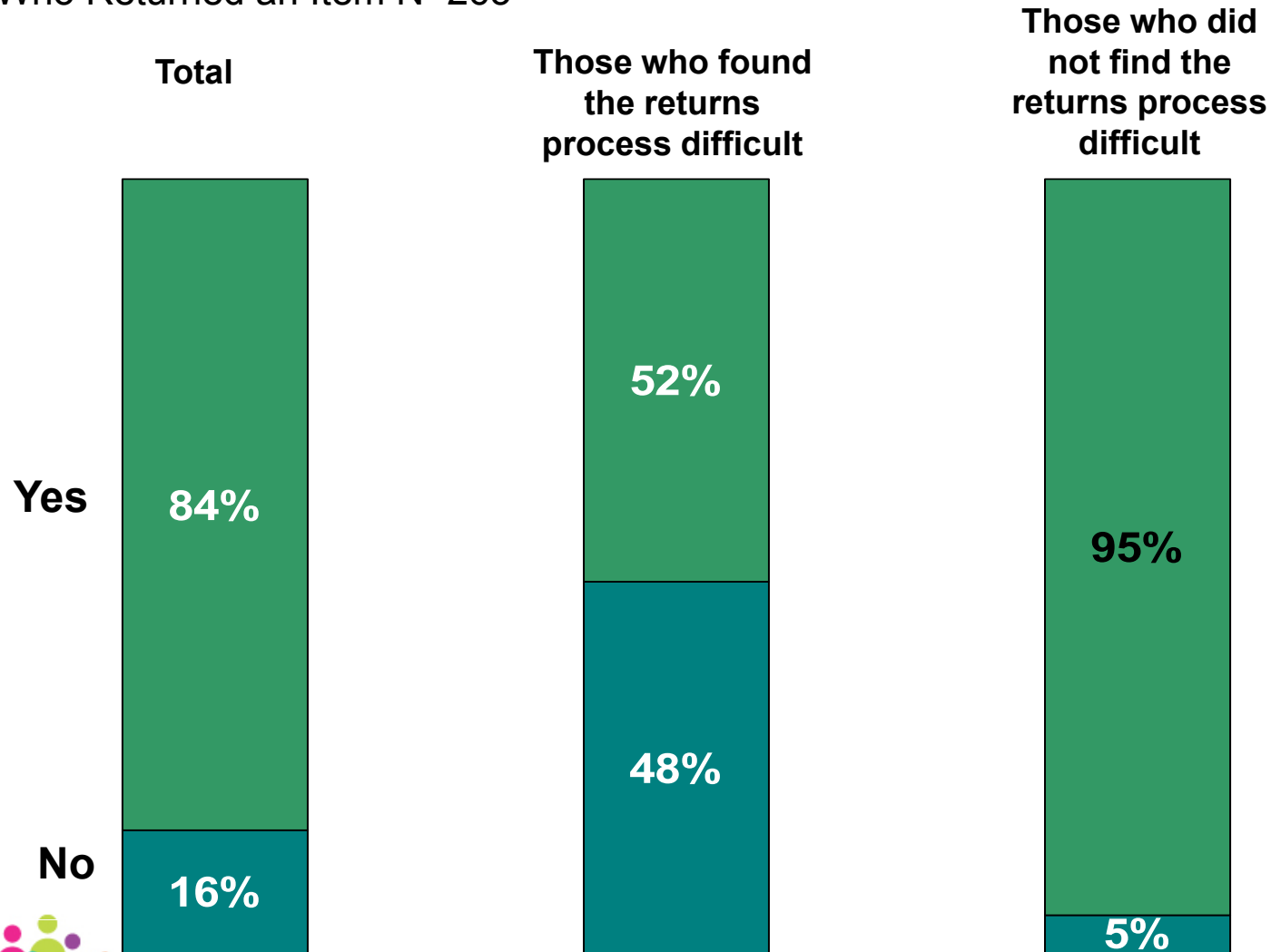


Under 35's, middle to lower social class backgrounds (38%) and those located in Munster (48%) were most likely to have already returned goods.



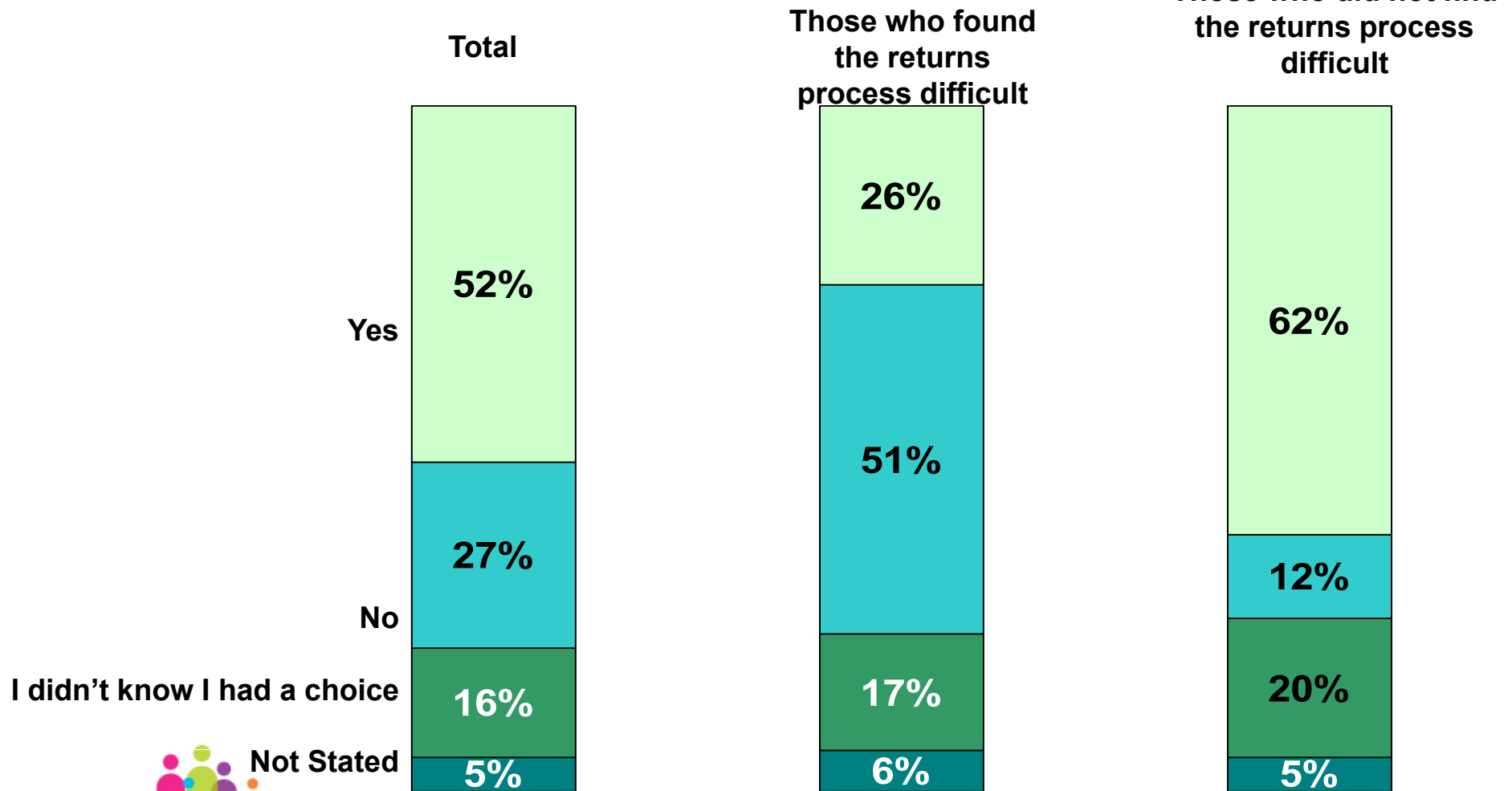
# Satisfaction with Outcome – Post Return

Base: All Who Returned an Item N=263



# Future Intention of Buying Again from Complaint Outlet

Base: All Who Had Cause or Reason to Complain N=380

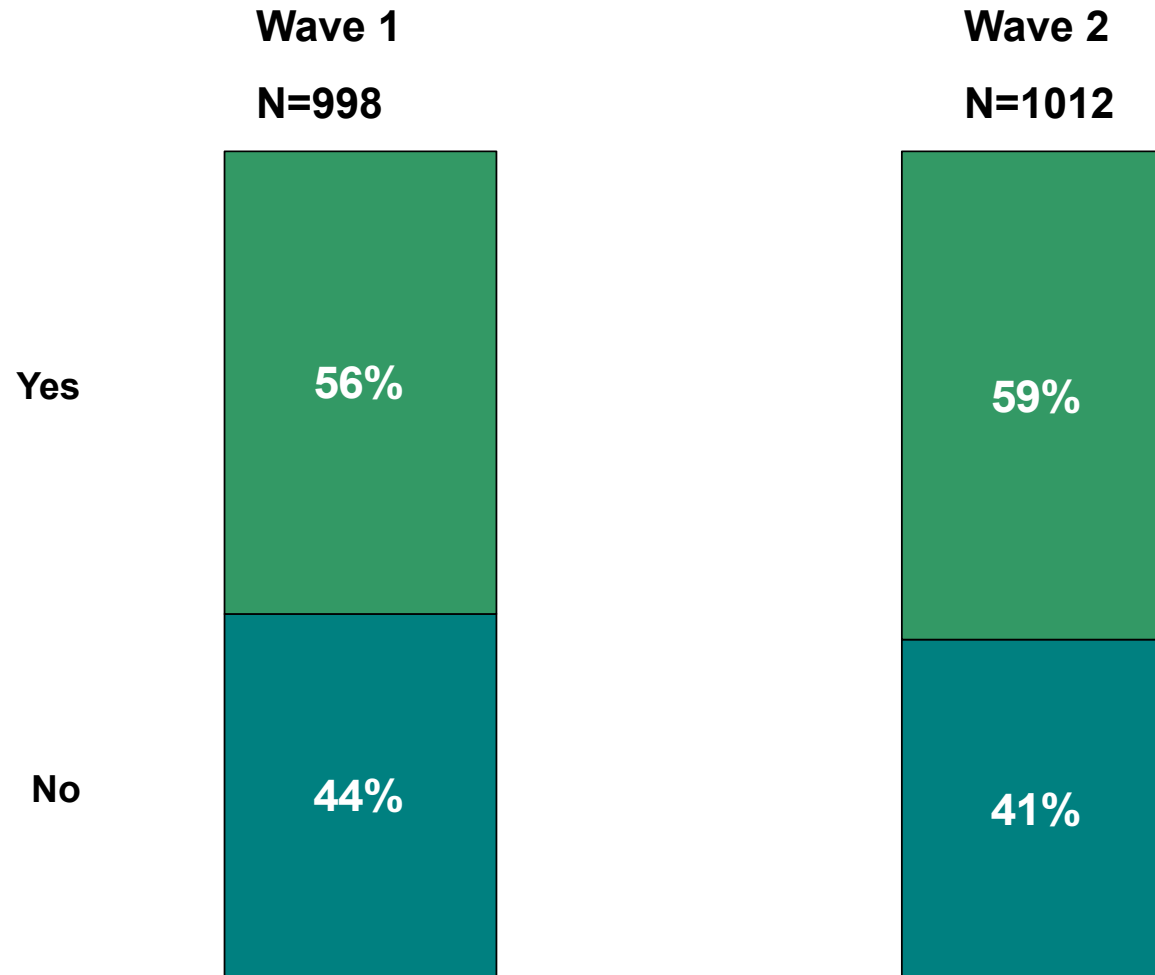


**As Internet penetration levels increase we thought  
it fitting to assess online purchasing and complaint  
making online...**



# Internet Usage

Base: All Respondents

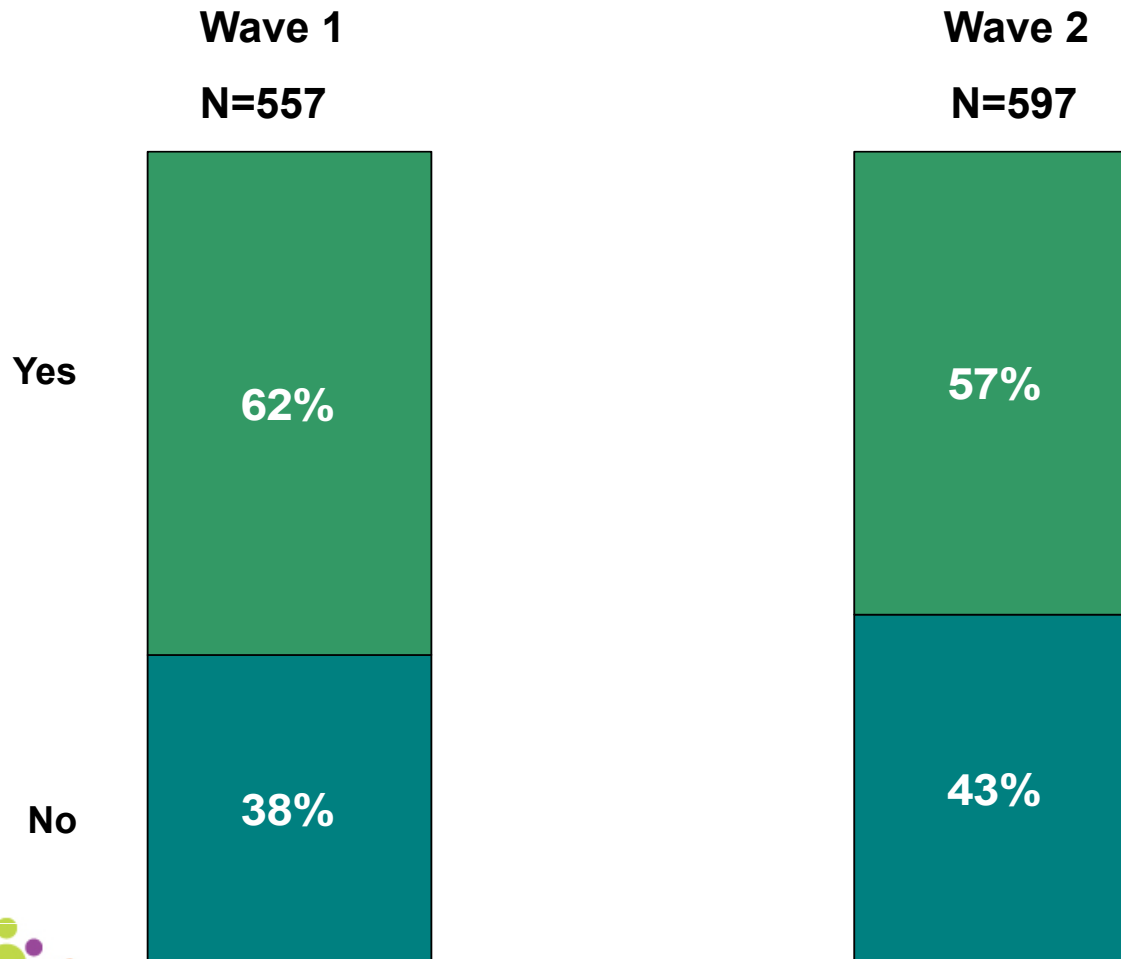


Internet users are marginally more likely to be aged 15-24 (79%), from Higher to Middle social class backgrounds (80%) and located in Dublin (68%).



# Incidence of Purchasing Online

Base: Those who use the Internet from Any Location

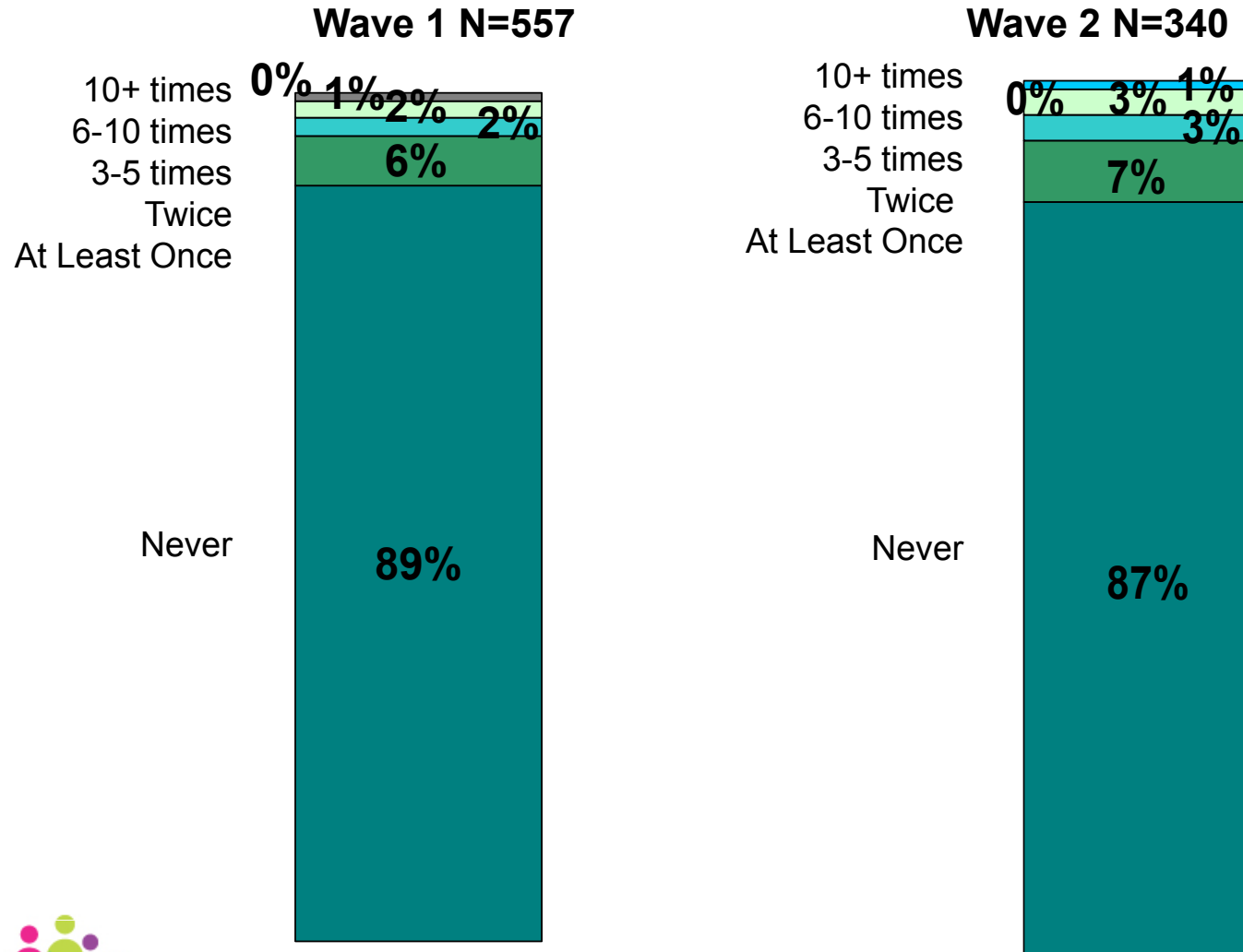


There was no gender bias among Internet shoppers, with this group likely to be aged 35-44 (69%), from Higher to Middle social class backgrounds (63%) and located in urban regions (61%).



# Frequency of Complaining about Online Shopping Experience in Past 12 Months

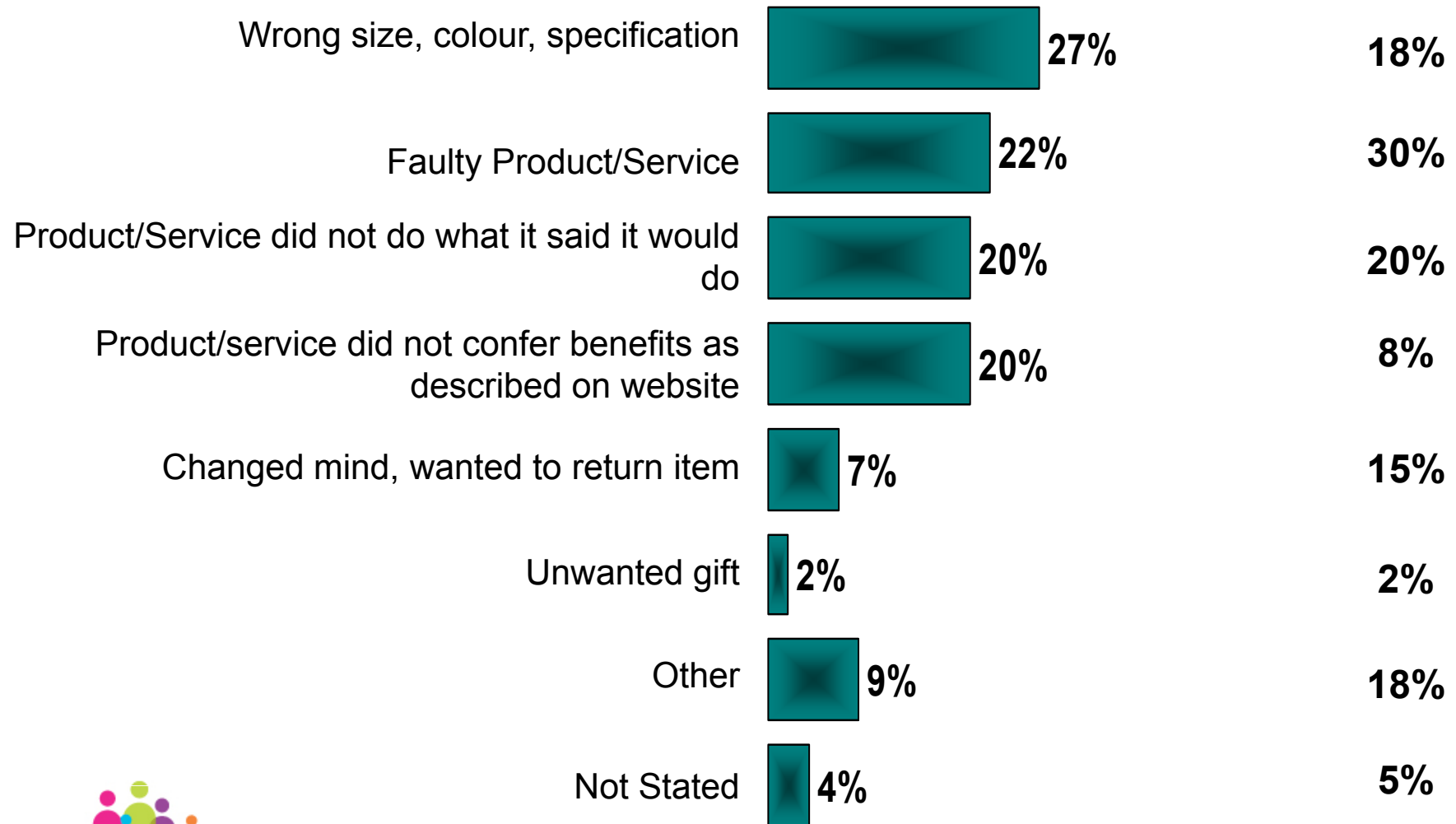
Base: All Who Shop Online



# Rationale for Online Complaint

Base: All Who Had Cause or Reason to Complain or Return Online Item N=45\*

**Wave 1**  
**N=60**

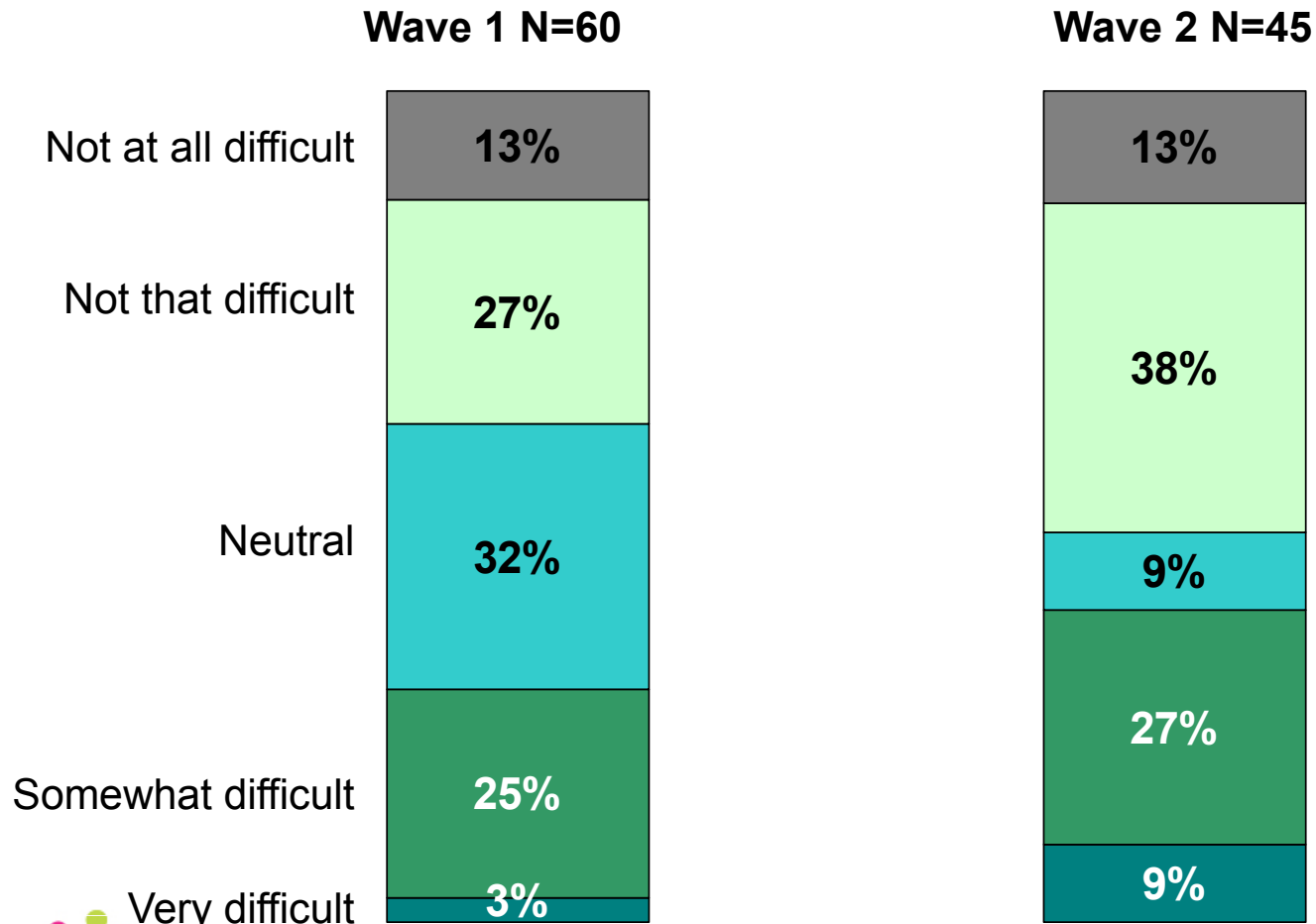


\* Please Note Small Base



# Online Returns Process

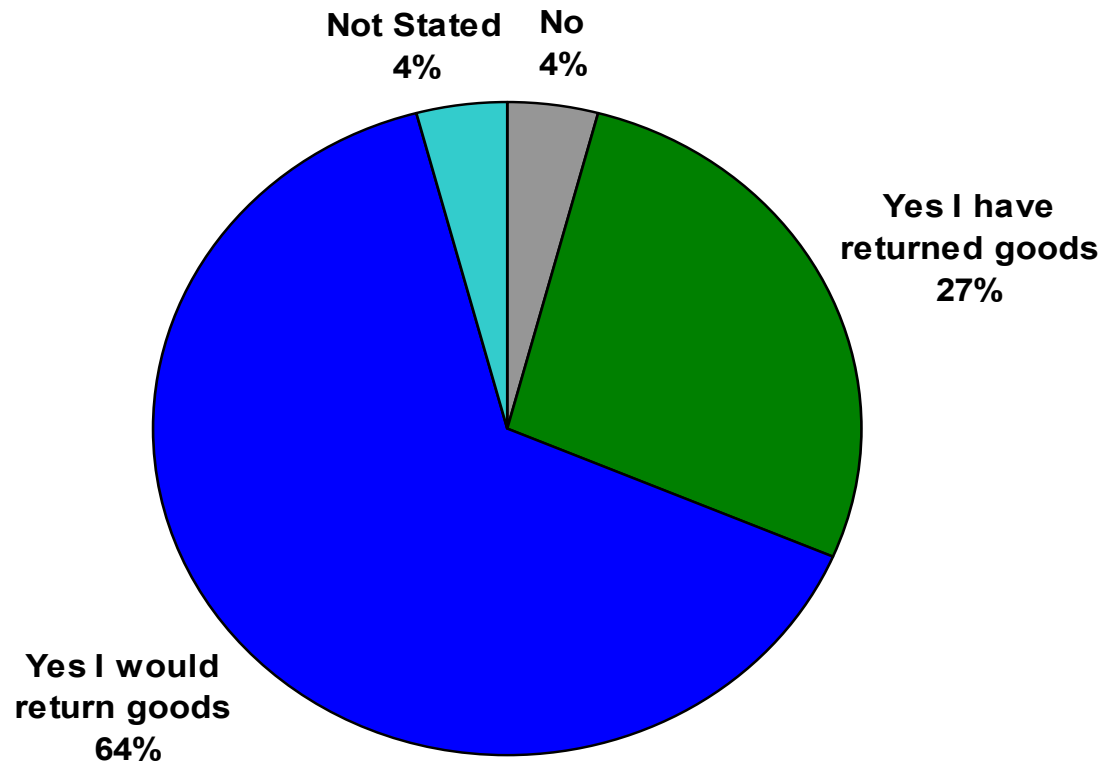
Base: All Who Returned an Item Online N=45



\* Please Note Small Base



Base: All Who Returned an Item Online N=45



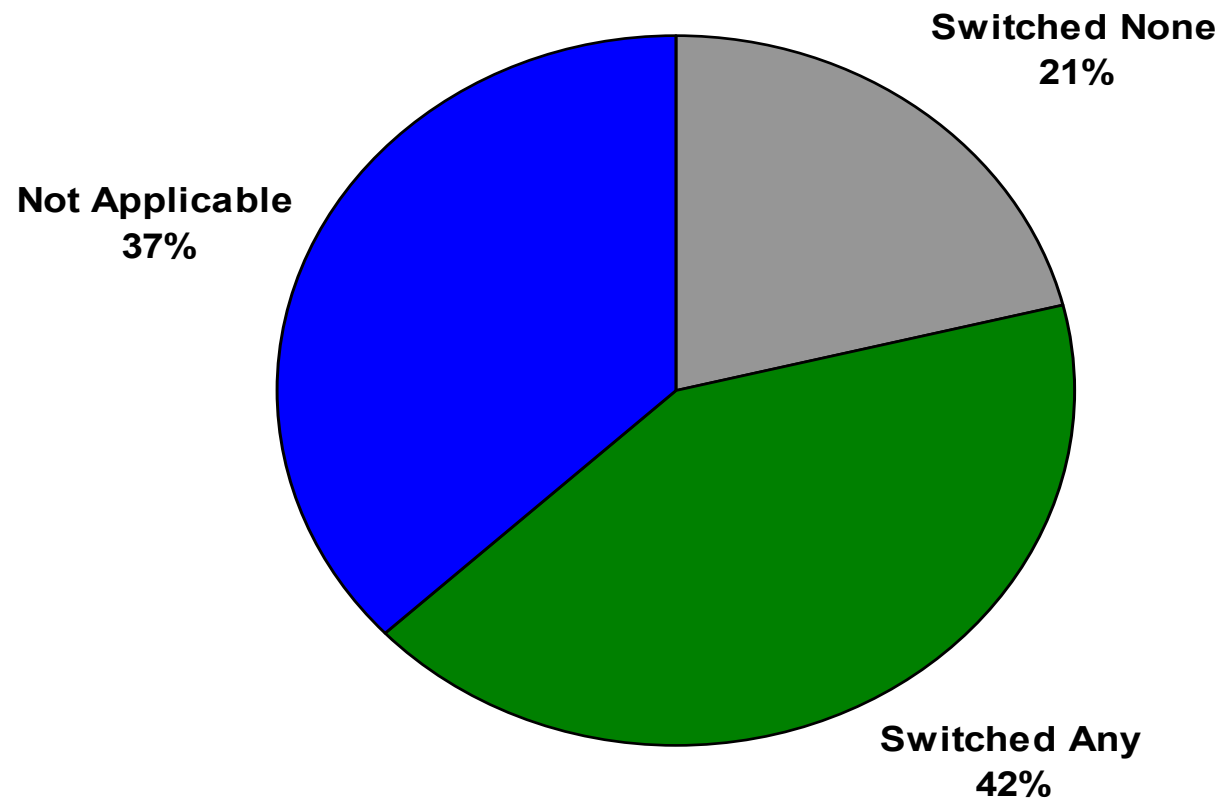
\* Please Note Small Base

**A minority of consumers have switched providers  
in a selection of categories examined in the research ...**



## Incidence of Switching – Any Service

Base: 1012 Aggregate All Adults 15+ Wave 2

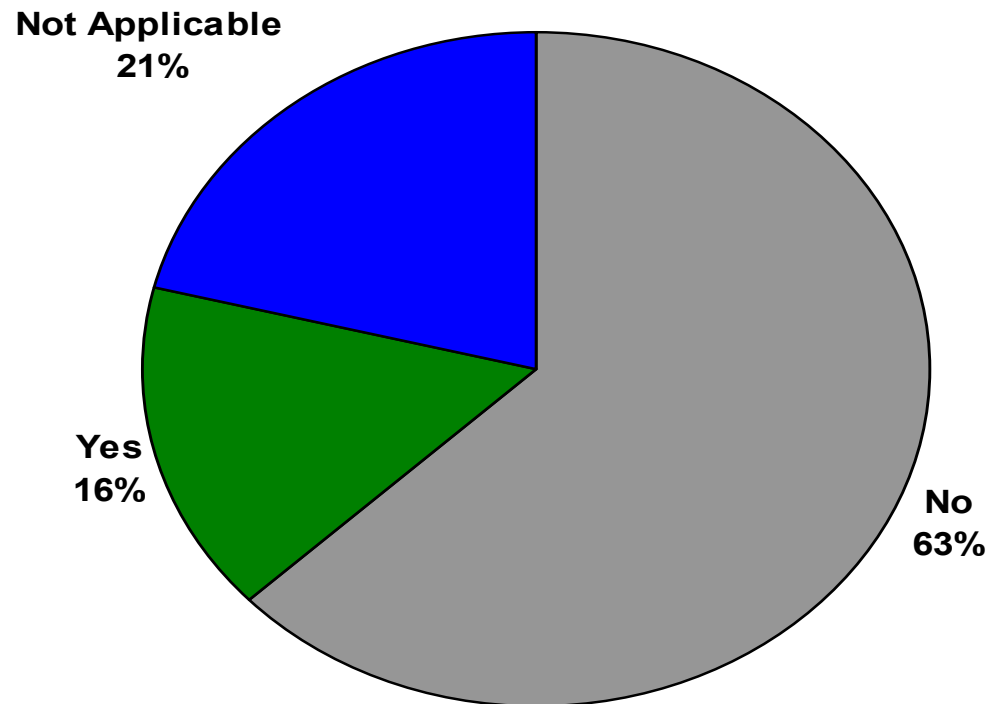


Those who switched were likely to be aged between 25-54 (47%), with high earning capacity (49%), families with dependents (45%), located in Dublin (50%).



# Incidence of Switching Land Line Service Providers

Base: All Adults 15+ N=1012



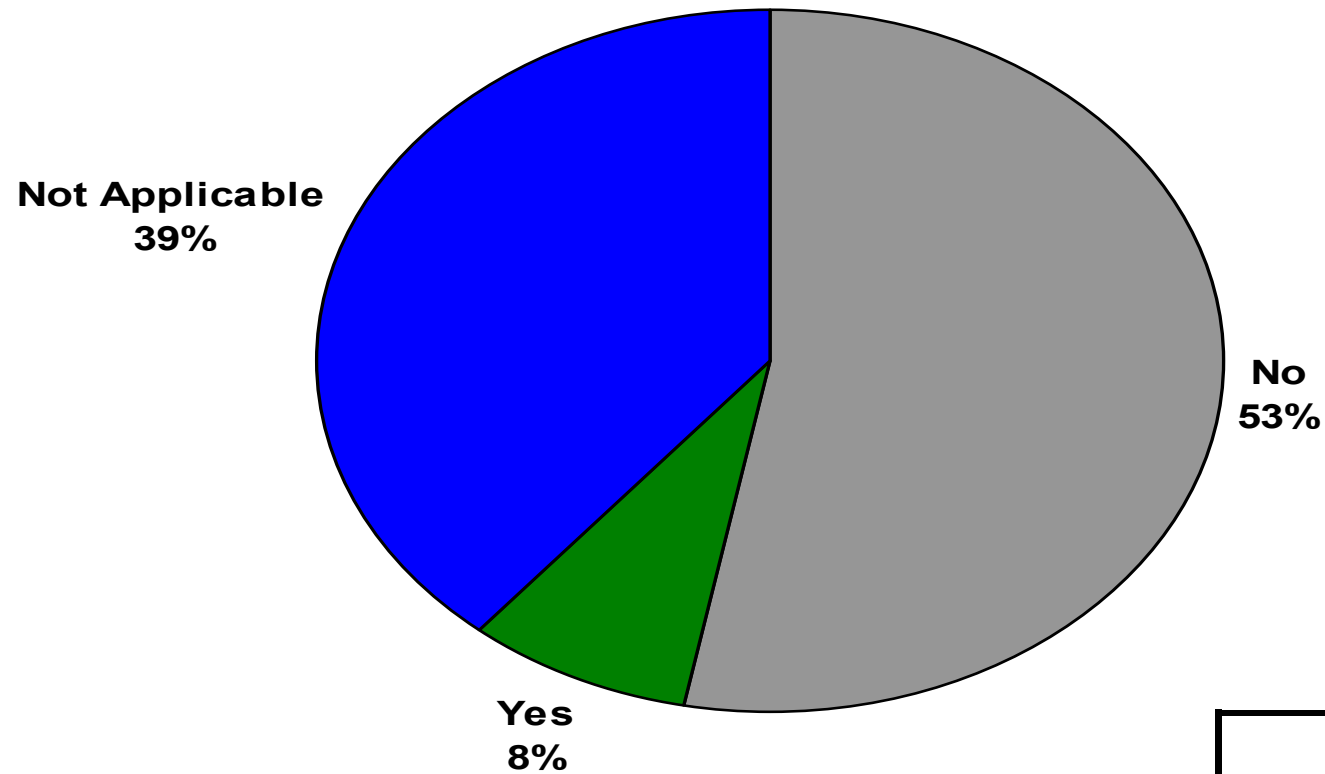
Among the 16% who switch Fixed Line Service Providers, Females (18%) and 45-54 year olds (26%) were most likely to make the move.

<b>Wave 1 N=998</b>
Yes 14%



# Incidence of Switching Broadband Service Providers

Base: All Adults 15+ N=1012

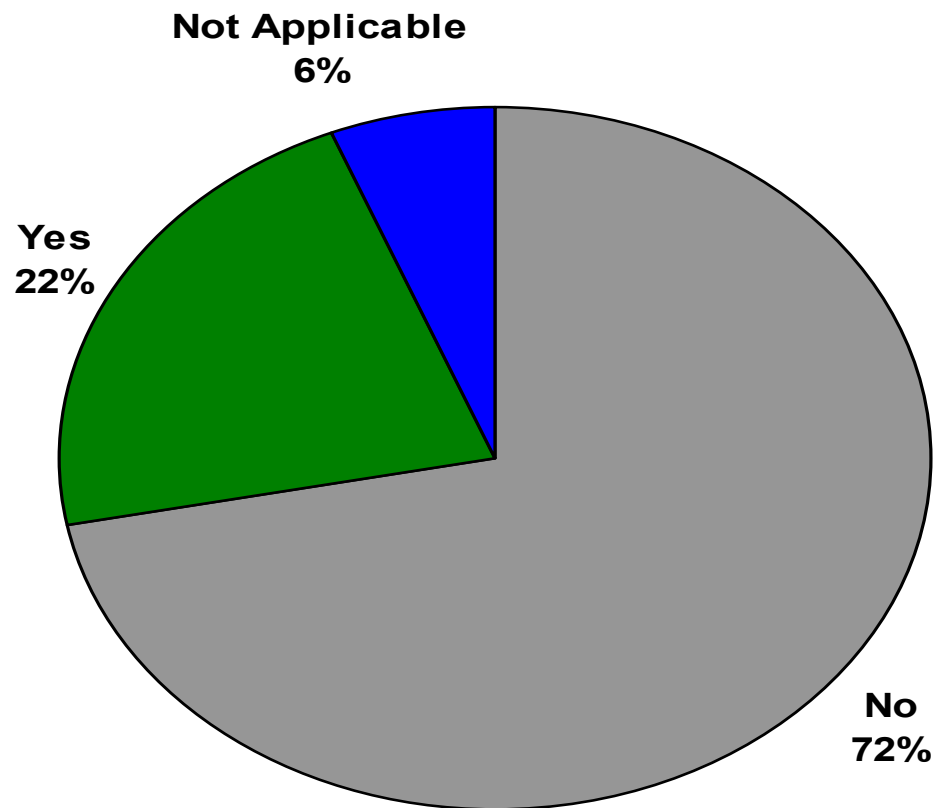


<b>Wave 1 N=998</b>
Yes 7%



# Incidence of Switching Mobile Providers

Base: All Adults 15+ N=1012

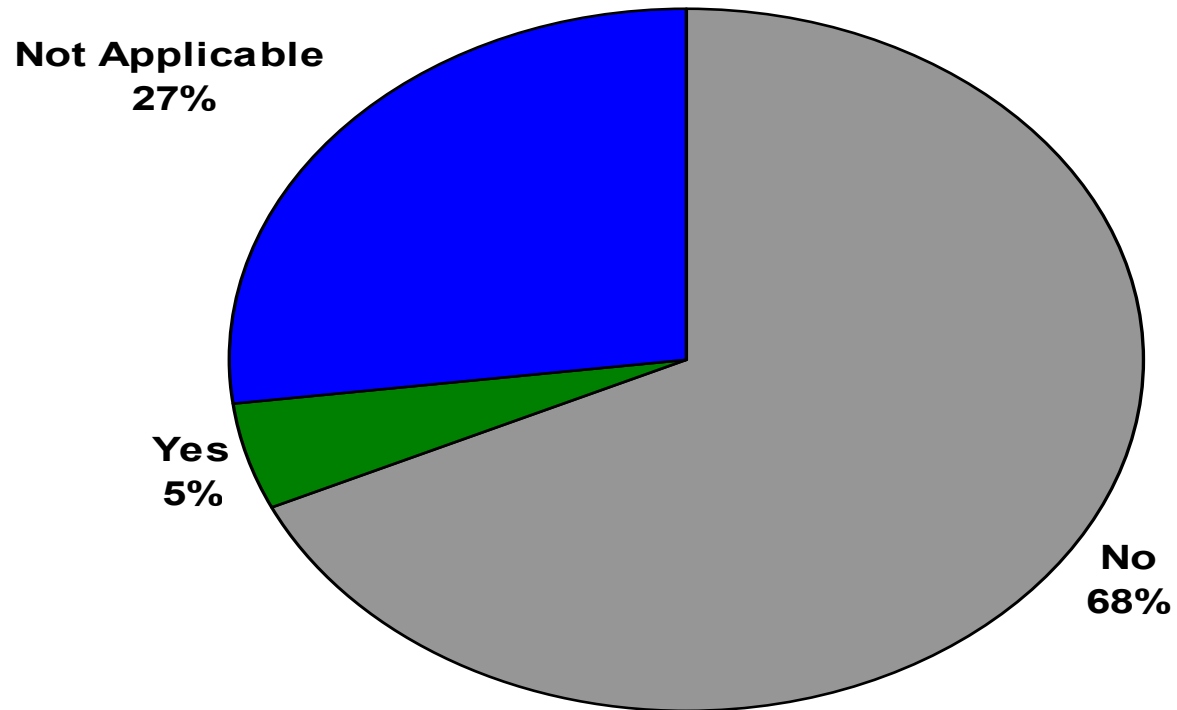


<b>Wave 1 N=998</b>
Yes 26%



# Incidence of Switching Health Insurance Service Providers

Base: All Adults 15+ N=1012

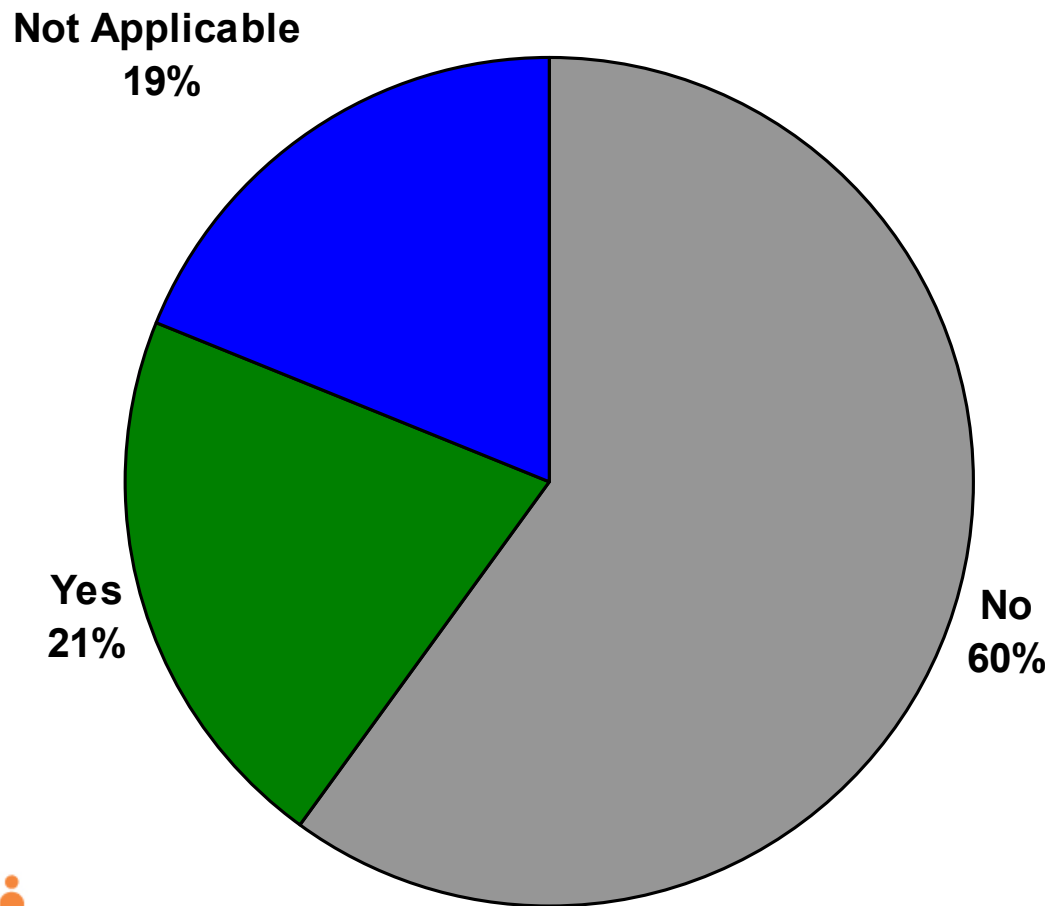


Wave 1 N=998
Yes 6%



# Incidence of Switching Car Insurance Service Providers

Base: All Adults 15+ N=1012

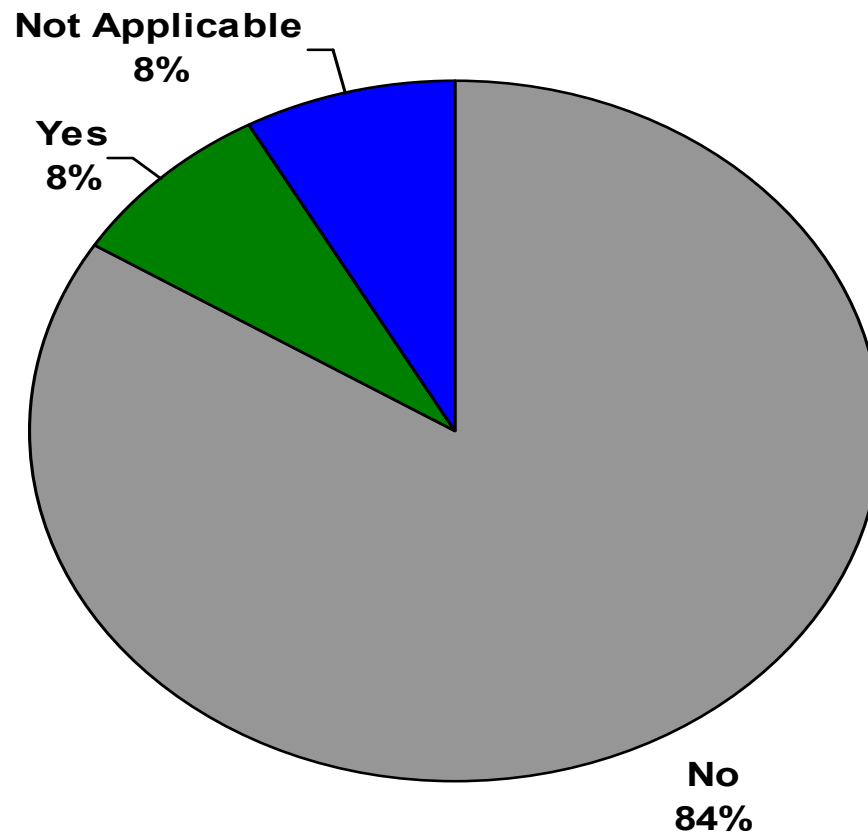


Wave 1 N=998
Yes 24%



# Incidence of Switching Bank Service Providers

Base: All Adults 15+ N=1012

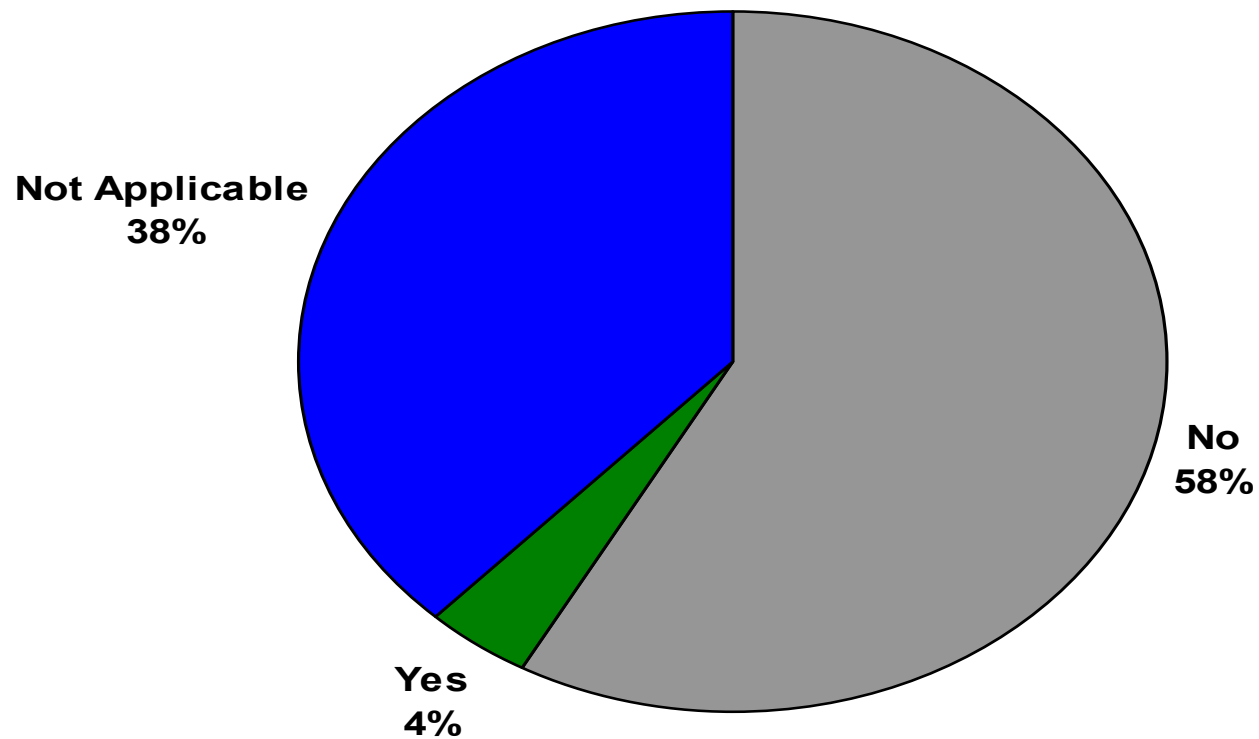


<b>Wave 1 N=998</b>
Yes 9%



# Incidence of Switching Mortgage Service Providers

Base: All Adults 15+ N=1012

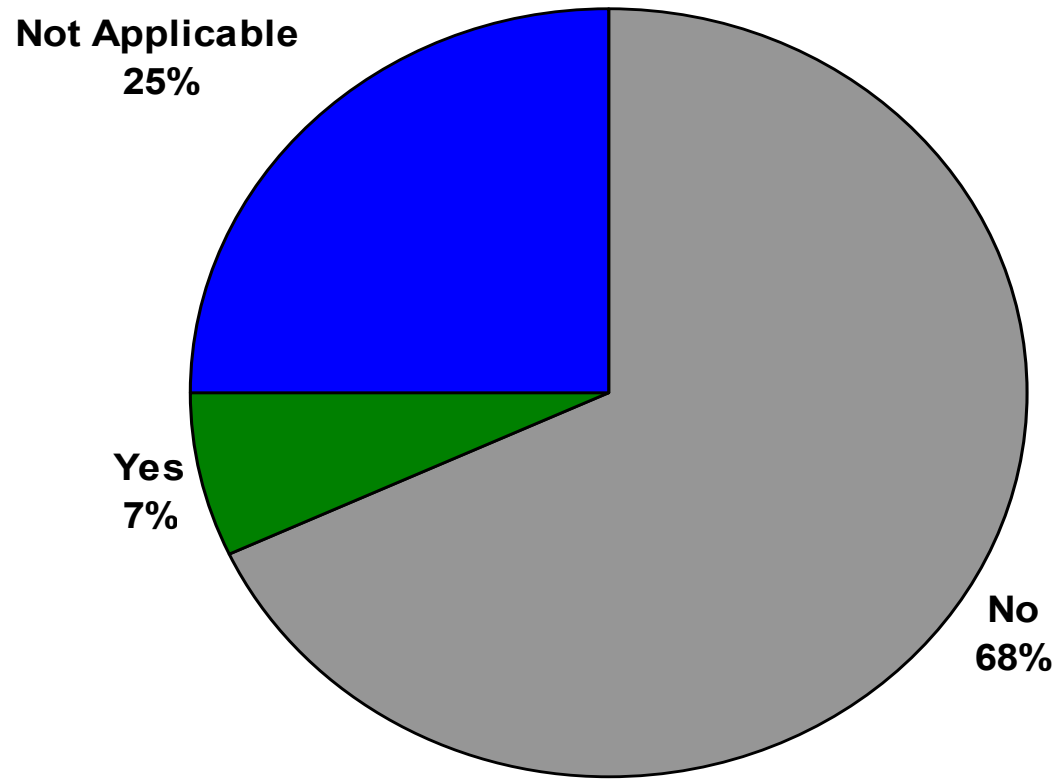


<b>Wave 1 N=998</b>
Yes 4%



# Incidence of Switching TV Service Providers

Base: All Adults 15+ N=1012

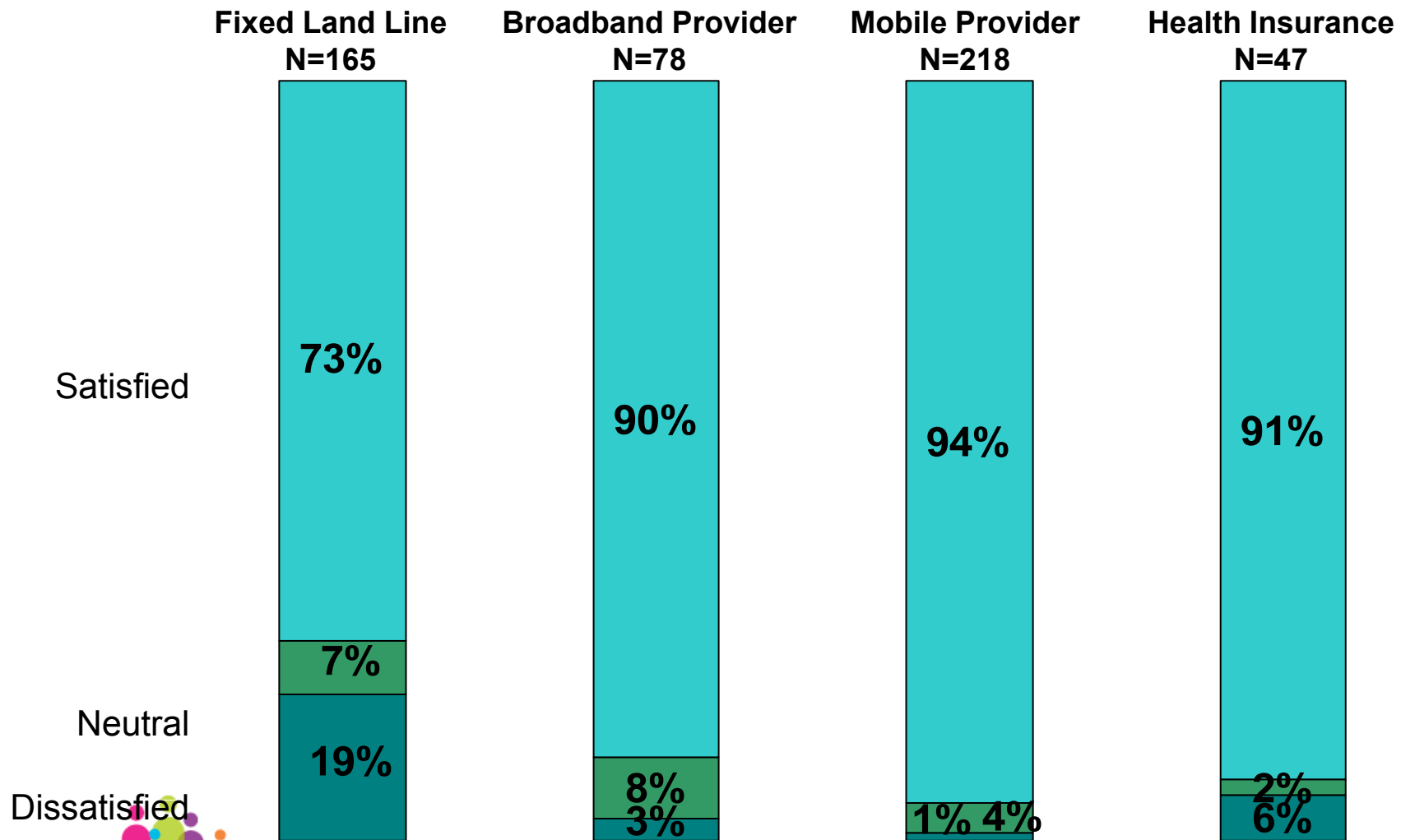


<b>Wave 1 N=998</b>
Yes 9%



# Satisfaction With Switching Process

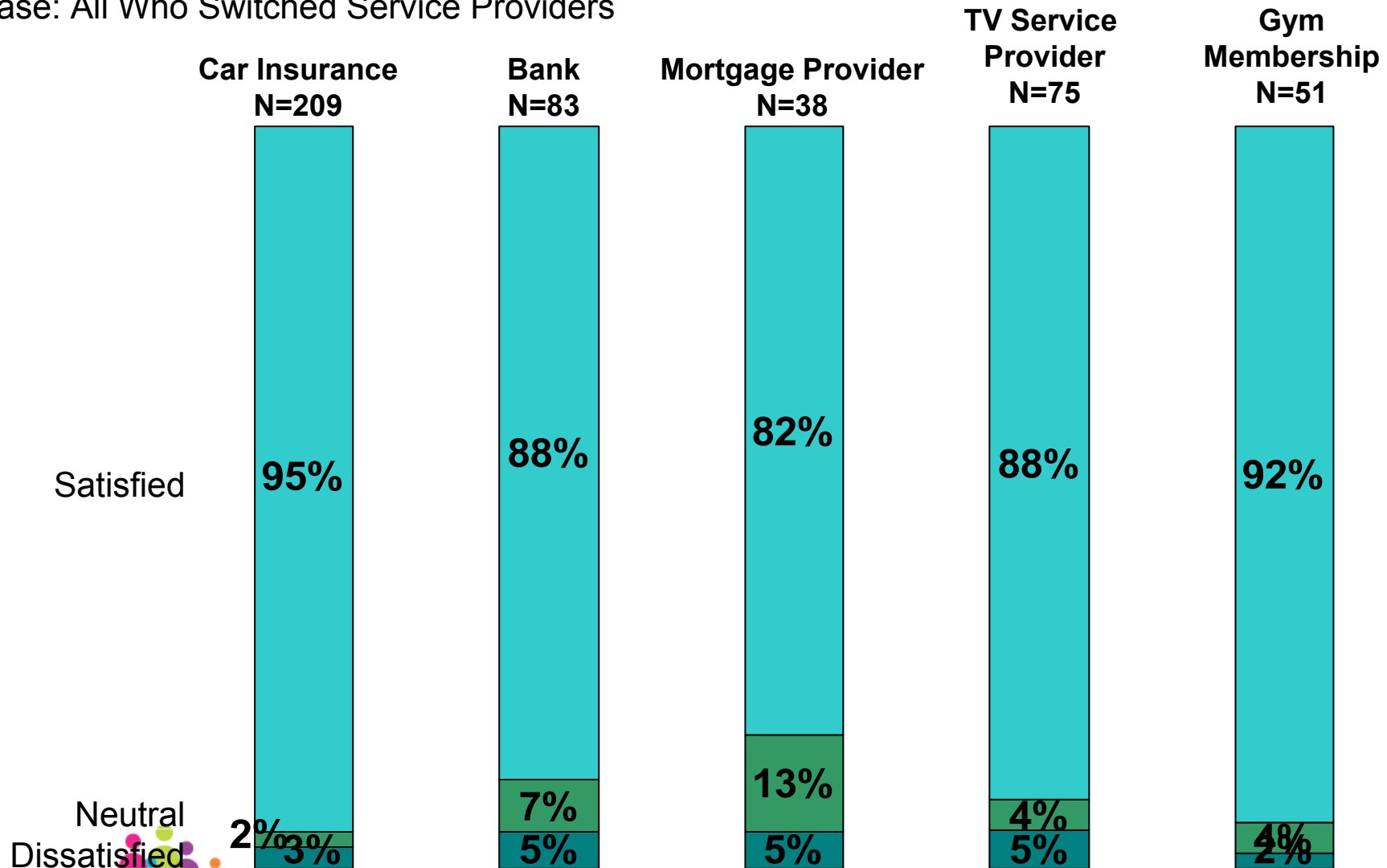
Base: All Who Switched Service Providers



\* Please Note Small Base

# Satisfaction With Switching Process

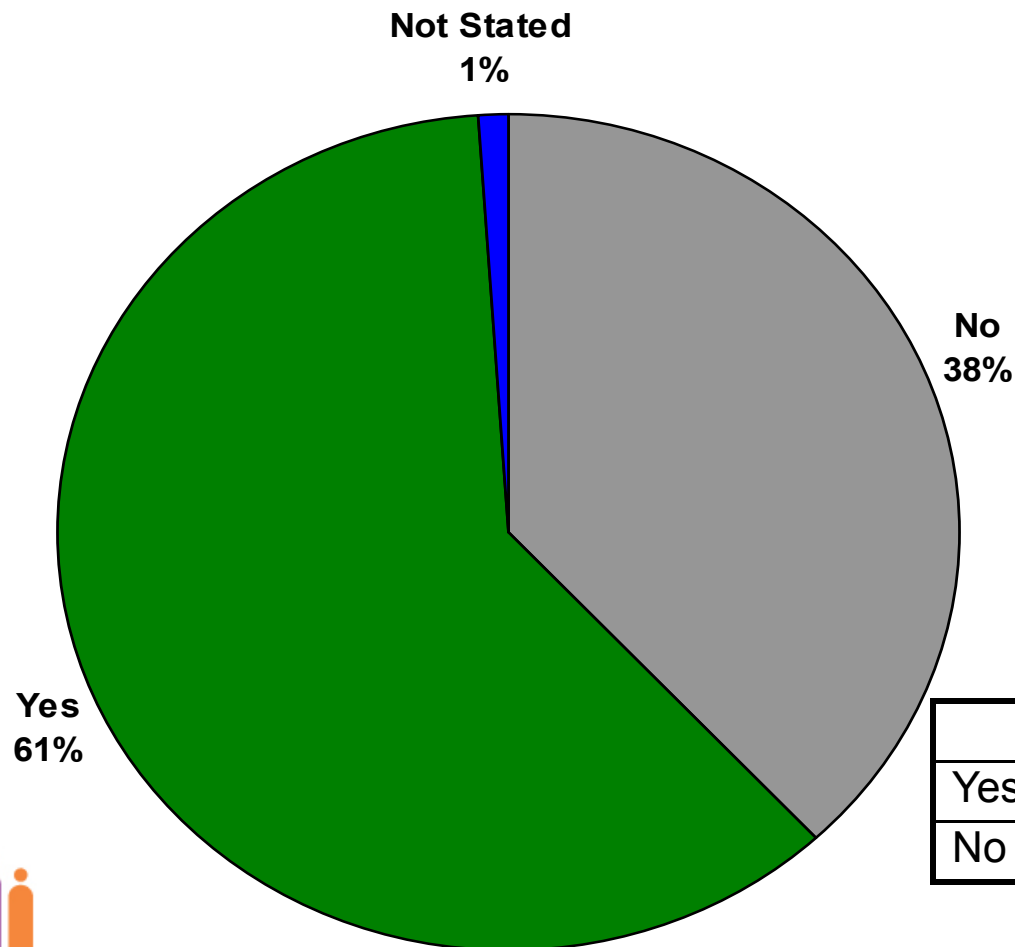
Base: All Who Switched Service Providers



\* Please Note Small Base

# Future Intention of Switching Land Line Service Providers

Base: All Who Have Switched Providers N=165

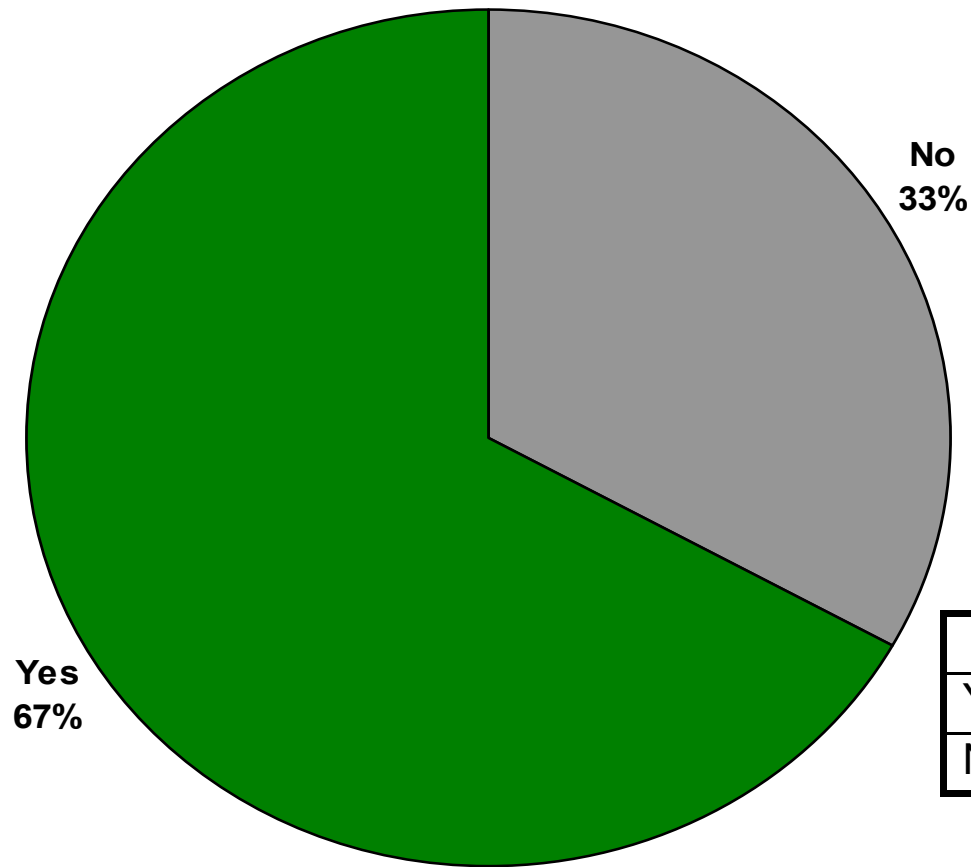


Wave 1 N=138	
Yes	70%
No	30%



# Future Intention of Switching Broadband Service Providers

Base: All Who Have Switched Providers N=78\*



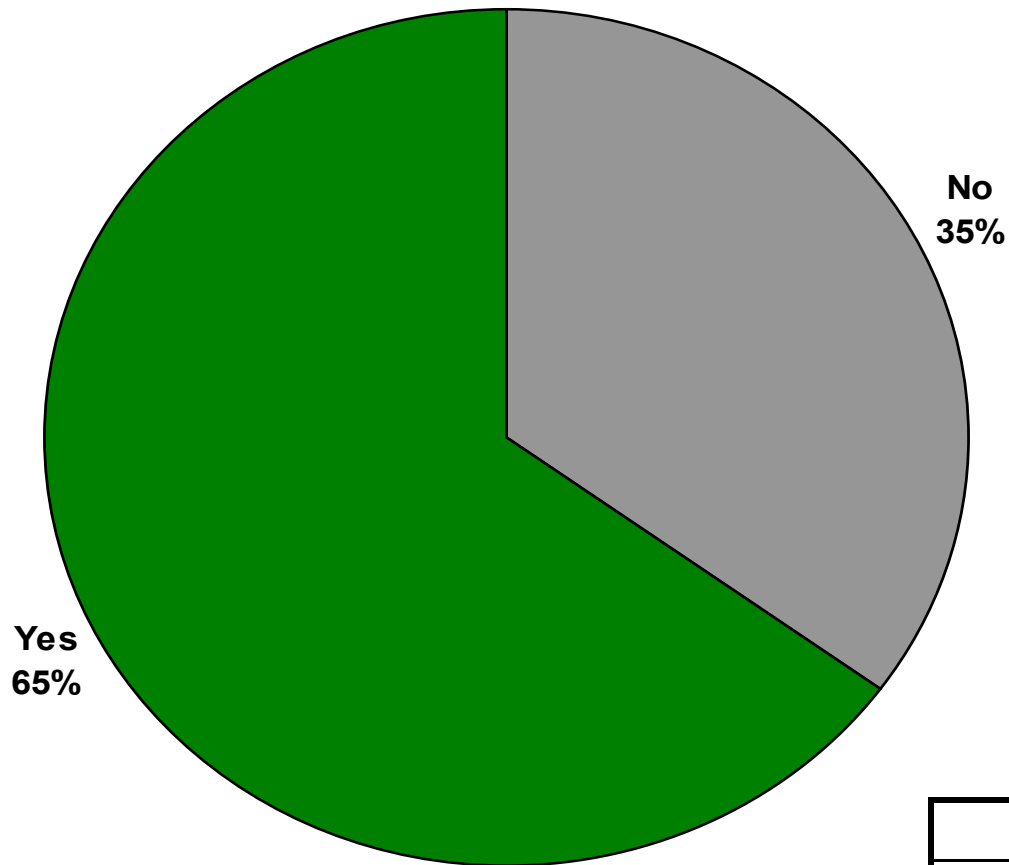
Wave 1 N=66	
Yes	68%
No	32%

\* Please Note Small Base



# Future Intention of Switching Mobile Service Providers

Base: All Who Have Switched Providers N=218

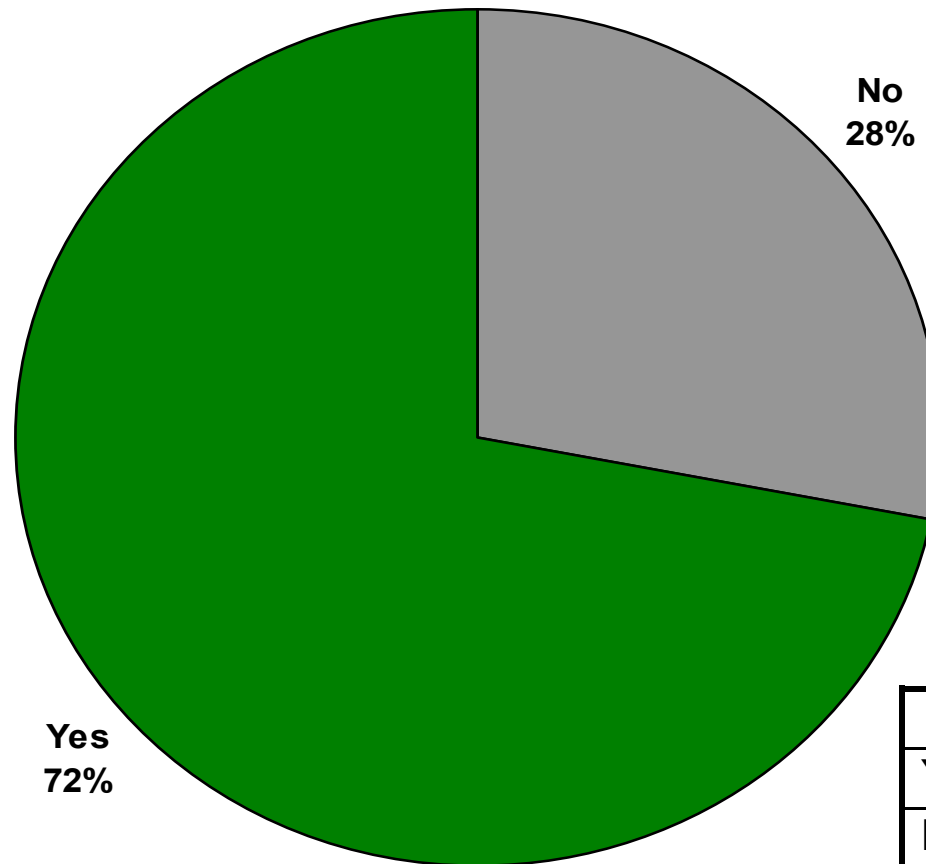


Wave 1 N=257	
Yes	74%
No	25%



# Future Intention of Switching Health Insurance Service Providers

Base: All Who Have Switched Providers N=47\*

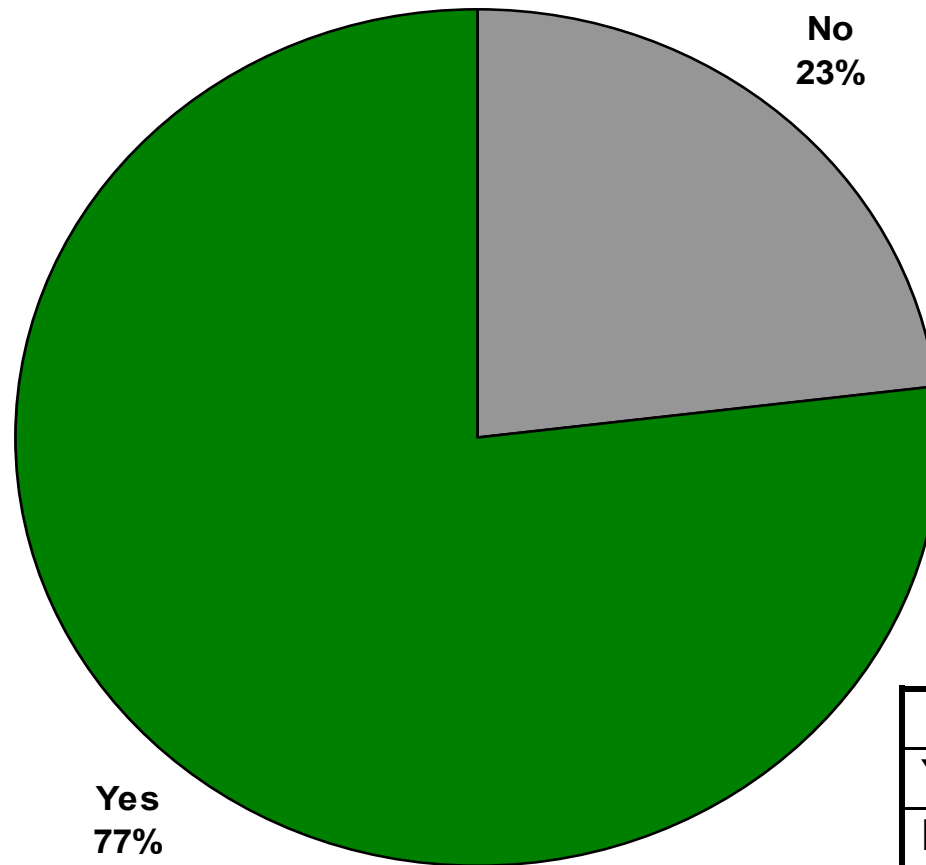


Wave 1 N=56	
Yes	75%
No	25%



# Future Intention of Switching Car Insurance Providers

Base: All Who Have Switched Providers N=209

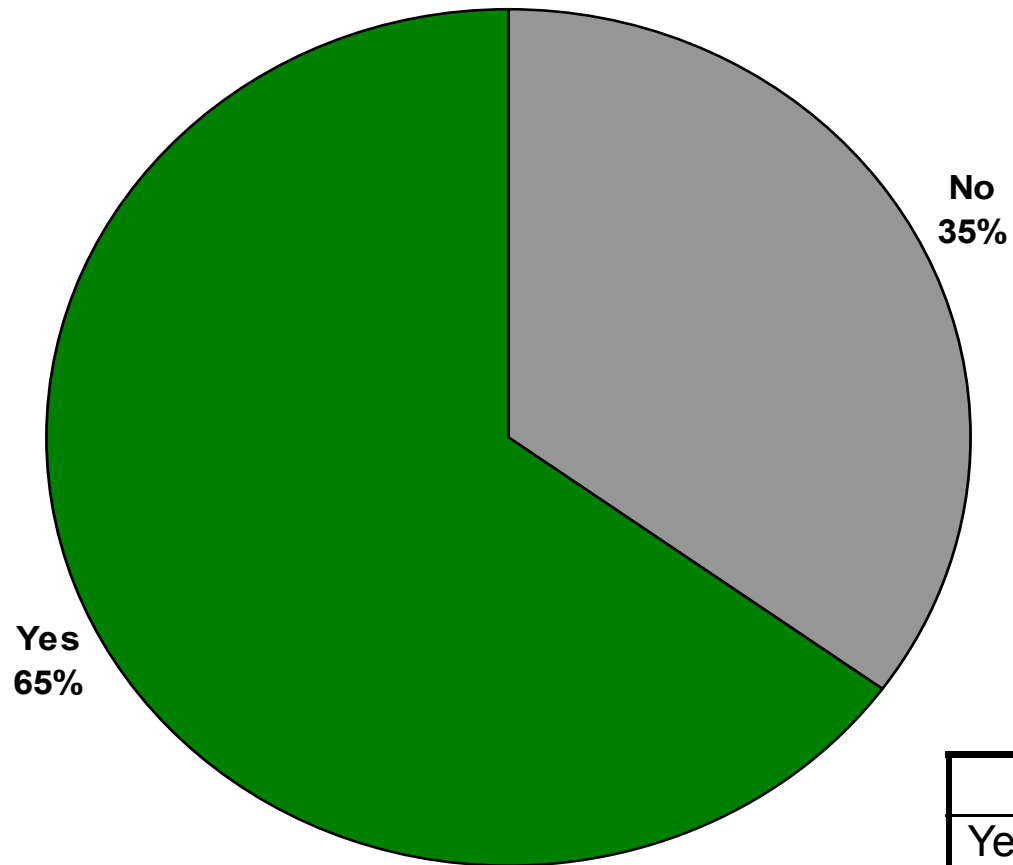


Wave 1 N=240	
Yes	88%
No	12%



# Future Intention of Switching Banks

Base: All Who Have Switched Providers N=83\*



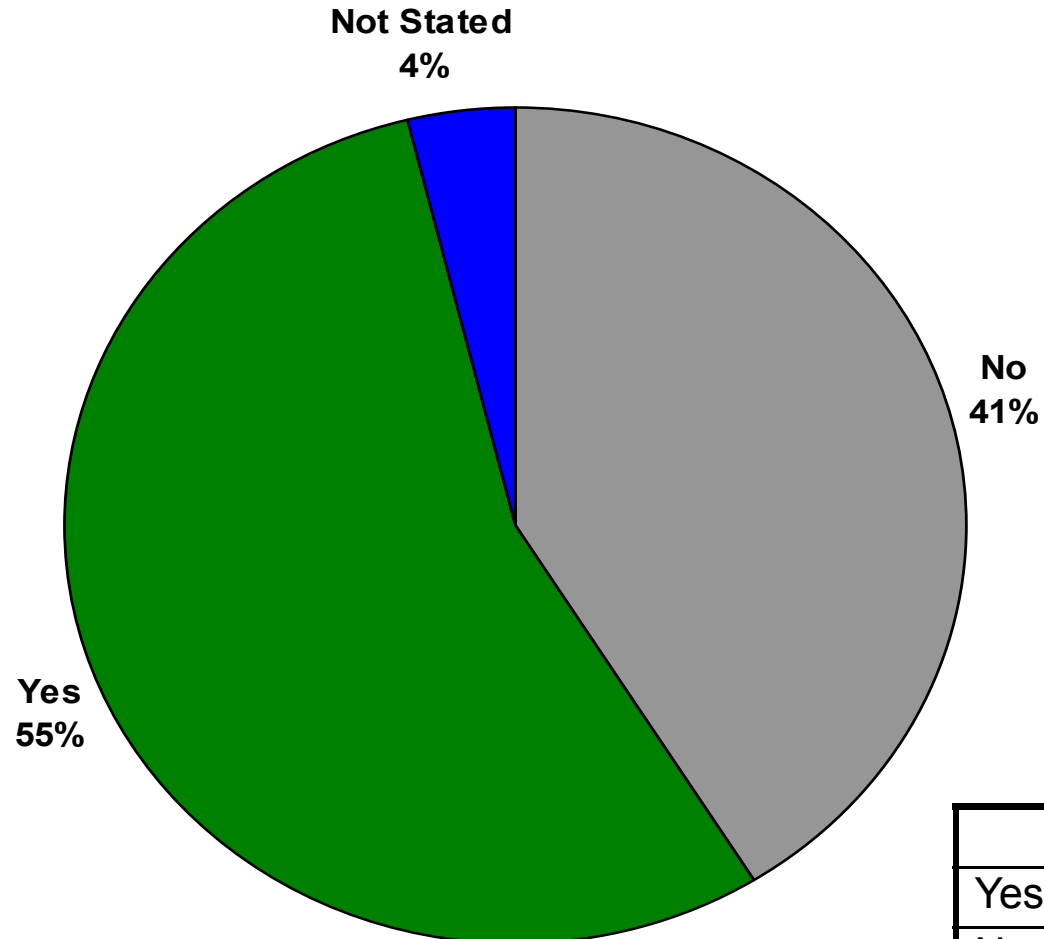
Wave 1 N=91	
Yes	67%
No	33%

\* Please Note Small Base



# Future Intention of Switching TV Service Providers

Base: All Who Have Switched Providers N=75\*



Wave 1 N=87	
Yes	68%
No	32%

\* Please Note Small Base



# Consumer Index

Base: Aggregate All Adults Wave 1 & Wave 2

Q. In general when buying goods and services from shops and other businesses, how – CONFIDENT, KNOWLEDGEABLE, PROTECTED – do feel about your rights as a consumer?

