



## *Research report*

# EdTrack

Understanding the experience of SMEs  
accessing HMRC education

**Business Customer & Strategy**  
**March 2013**

## *About Business Customer and Strategy (BC&S)*

Business Customer and Strategy is part of Business Tax.

The goal of BC&S is to maximise Business Customer compliance for HMRC at best cost for both HMRC and the customer. This is done by developing business tax strategies through customer understanding, working with teams in HMRC and across government departments.

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**EdTrack*****Research requirement (background to the project)***

HM Revenue and Customs (HMRC) commissioned research to better understand the experience of Small & Medium sized Enterprises (SMEs) accessing education about meeting their tax obligations.

The HMRC Business Customer & Strategy (BC&S) Directorate has overarching objectives to improve compliance and the SME customer experience, whilst reducing the overall cost of servicing these customers.

The overall target for the SME strategy is based on providing proactive, targeted education to customers who need help to understand their tax obligations, thereby reducing long term need for help and volume of customer error.

HMRC education channels available to SME customers during the duration of the project included:-

- HMRC workshops
- HMRC Come See events (Local Employer/Business Advice events)
- Intermediary presentations (HMRC & Partner presentations)
- E-learning accessed via trade organisation websites
- Webinars (both live and recorded) – online presentations
- HMRC telephone calls
- HMRC education emails
- Seminars/advice stands at Trade Shows/Exhibitions

Research was initially commissioned in 2011 to form a baseline measure of SMEs experience of HMRC Education channels. Research carried out through 2012/2013 has tracked experience and attitudes of SMEs against this baseline.

The core aims of the research are to:-

- track understanding of customer experience
- understand whether the education given to SMEs is fit for purpose
- assess the impact of education on SME compliance attitudes and customer satisfaction
- evaluate whether education is working at an overall level and comparing individual channels to establish which channel works best for which type of customers

***When the research took place***

- SME online survey was completed between 30 May 2012 and 15 March 2013
- Qualitative interviews with consenting survey respondents conducted throughout the survey fieldwork period

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## *Who did the work (research agency)*

SPA Future Thinking: Rachel McGrail

## *Method, Data and Tools used, Sample*

The research comprised two elements:-

### 1. Online Survey

Fieldwork was carried out in four quarters of interviewing as follows:-

- Quarter 1: 30 May – 12 July 2012
- Quarter 2: 13 July – 30 September 2012
- Quarter 3: 1 October – 31 December 2012
- Quarter 4: 1 January – 15 March 2013

SMEs for the survey were invited to participate through an emailed invitation and survey link issued by HMRC.

The final number of surveys completed for each channel differed due to variance in the availability of sample as shown in Table 1.1.

**Table 1.1 Surveys completed**

	TOTAL	Workshop	Come See Event	Intermediary presentation	E-Learning	Webinars (Live only)	Telephony	Education Email	Trade shows
Quarter 1	558	35	-	121	-	60	177	165	-
Quarter 2	862	70	-	285	-	108	187	212	-
Quarter 3	1,087	152	57	297	1	124	258	192	6
Quarter 4	1,133	69	384	168	68	176	184	84	-
<b>TOTAL</b>	<b>3,640</b>	<b>326</b>	<b>441</b>	<b>871</b>	<b>69</b>	<b>468</b>	<b>806</b>	<b>653</b>	<b>6</b>

The questionnaire for the survey was developed in consultation with HMRC. Questionnaire alterations were made between Quarter 1 and 2 and Quarter 2 and 3.

Where respondents were prompted with a free-response question, they were allowed to skip forward in the survey and choose not to respond.

### 2. Qualitative Interviews

29 qualitative interviews were conducted throughout the 2012/2013 fieldwork period with survey respondents who gave particularly interesting or negative feedback within their results.

A discussion guide for the qualitative sessions was developed in consultation with HMRC.

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## Main Findings

### Overall satisfaction

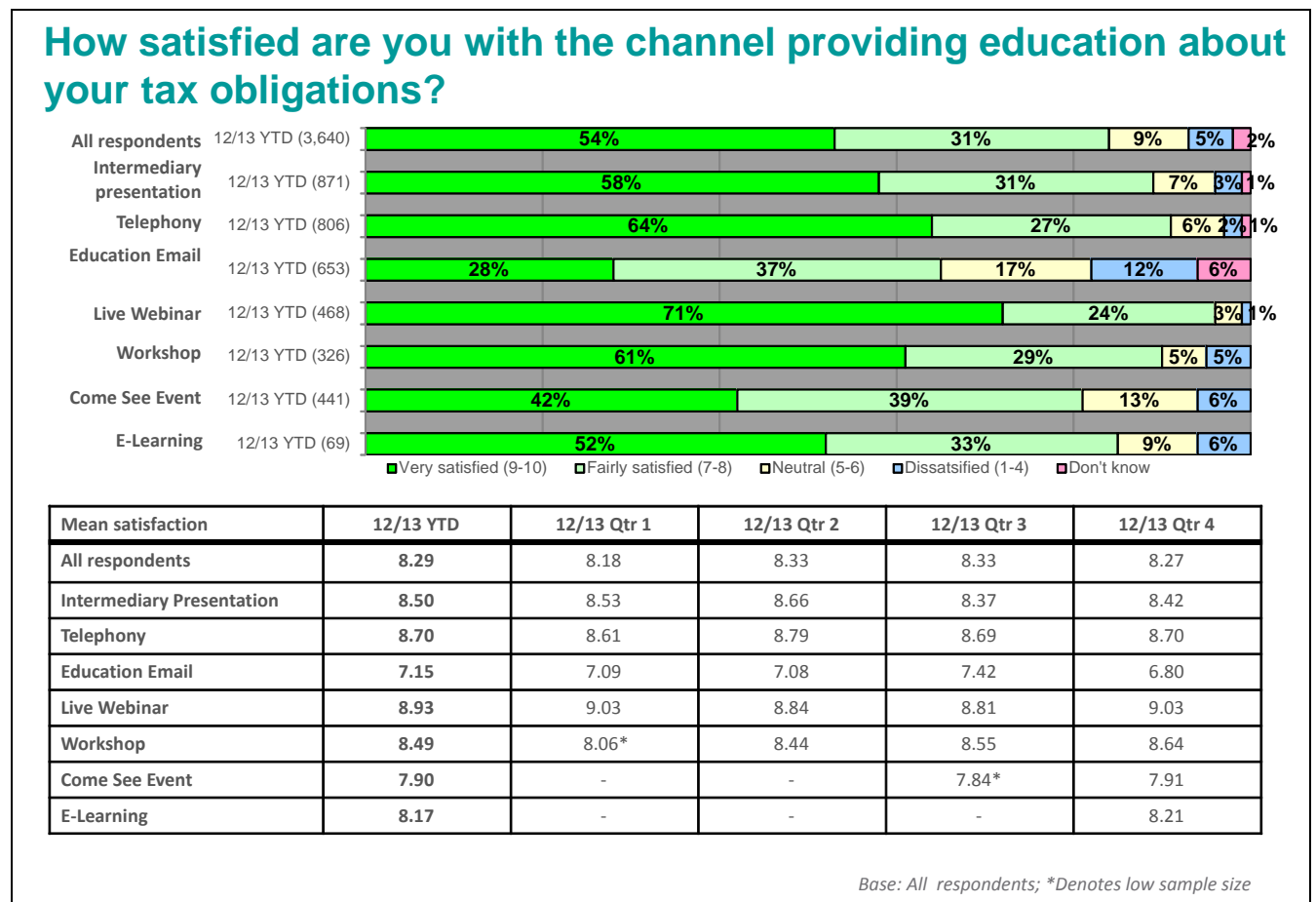
Aggregate findings for HMRC education are very positive; over half rate the channel accessed nine or ten out of ten.

Satisfaction is highest for the following channels:-

- Live webinars
- Telephony
- Workshops
- Intermediary presentations

Satisfaction levels have remained relatively stable throughout 2012/2013 with some fluctuation for the education email channel.

**Table 1.2: Overall satisfaction with education**



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**Overview of Year to Date findings**

Supporting the high levels of satisfaction, attitudes towards all aspects of education are similarly high at an aggregate level as shown in Chart 1.3.

SMEs are particularly satisfied with the staff they have contact with, where this forms part of the channel offering.

Content relevance scores well across most channels in particular telephony, where communication can be more bespoke due to their 1 to 1 nature, and Live Webinars, where participants have the opportunity to interact.

On average, 83% of SMEs agreed that the education made clear what actions were required by them to meet their obligations to HMRC and where they could access further support if required. With only 5% of SMEs disagreeing.

**Table 1.3: Overview of YTD findings**

		Aggregate result	Channel result*						
			Intermediary presentation	Telephony	Education email	Live Webinar	Workshop	Come See Event	E-Learning
Satisfaction with channel	Mean satisfaction scores out of 10	8.29	8.50	8.70	7.15	8.93	8.49	7.90	8.17
Satisfaction with content relevance		8.38	8.60	8.97	7.15	8.93	8.56	8.00	7.80
Satisfaction with ease of understanding content		8.28	8.21	8.71	7.22	8.92	8.41	8.36	7.96
Satisfaction with visual aids/materials being appropriate		8.12	7.94	-	-	8.77	7.99	7.85	-
Satisfaction with staff professionalism		9.22	9.21	9.46	-	9.37	9.20	8.63	-
Satisfaction with staff knowledge		9.06	9.14	9.19	-	9.31	9.06	8.41	-
Satisfaction with staff being approachable		9.13	9.14	9.42	-	-	9.21	8.60	-
Satisfaction with staff ability to answer questions		8.91	8.98	9.17	-	9.21	8.86	8.06	-
Timeliness of education	% about right time	76%	85%	76%	65%	79%	87%	63%	-
Depth of information	% about right	80%	83%	88%	75%	82%	83%	60%	86%
Extent education met expectations	% exceeded/met expectations	76%	83%	-	56%	90%	84%	68%	81%
Extent of agreement education made clear actions required	% agreeing	83%	88%	87%	60%	91%	91%	81%	87%
Extent of agreement education made clear where further help/education could be accessed		83%	86%	84%	68%	93%	83%	83%	87%
Action taken as a result of education	% taken/will take action	72%	83%	68%	69%	72%	81%	59%	59%

\* Results shown for all channels with sample size of at least 50

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**EdTrack*****Conclusions***

- The SME customer research confirms education is working well for customers; and nearly 9 out of 10 customers are satisfied or very satisfied with the service they receive.
- Channels such as live webinars, workshops, telephony and intermediary presentations are rated particularly highly.
- Experiences of Come See events and education emails are more mixed with lower positive responses on key measures. However, education emails are at a disadvantage to other forms of education due to their limited content so a direct comparison with other results is difficult. The email capability is being upgraded in July 2013.