

## ***Research report***

# **Real Time Information Agents' Awareness Tracking**

To establish the levels of awareness of RTI amongst the Agent community, what preparation they feel is required, and what impact they anticipate RTI will have on their clients

**TNS-BMRB**  
**26<sup>th</sup> February 2013**

## RTI Agents' Awareness Tracking

### *About Personal Tax Customer & Strategy (PT C&S)*

Personal Tax Customer & Strategy works with colleagues in Personal Tax and across HMRC to help develop our approach to implementing the customer centric business strategy. We use customer insight to help PT design, deliver and operate services for individual customers which

- improve customer experience
- maximise tax yield
- ensure that those who need help get the support they need, when they need it

PT C&S also has a corporate role, to manage the relationship with the voluntary and community sector on behalf of HMRC

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## RTI Agents' Awareness Tracking

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

RTI is a key government priority aimed at improving the operation of PAYE by making the system better for taxpayers and easier for employers and HMRC to administer.

Key to RTI success is the migration of employers to the new process by October 2013 and agents will play an important role in raising awareness of, and ensuring preparedness for, RTI amongst the employer population.

The objectives of the project are to establish:

- the levels of awareness of RTI amongst the Agent community,
- what preparation they feel is required, and
- what impact they anticipate RTI will have on their clients.

### *When the research took place*

Fieldwork took place between 5th November and 7<sup>th</sup> December 2012.

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

TNS-BMRB, a research agency operating out of offices in London and Edinburgh, managed the collection and analysis of information. Within HMRC, the research was managed on behalf of the HMRC RTI Programme and the Behavioural Evidence and Insight Team by KAI (Knowledge Analysis and Intelligence) Project Group. All analysis and interpretation, as well as the preparation of reports, was undertaken by members of the RTI Programme and the Behavioural Evidence and Insight Team (BE&IT) within HMRC.

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

This research was conducted as part of HMRC's Customer Survey: The key aim of the survey is to track changes in customer perceptions of HMRC; and of the experience of dealing with the Department for each of three main customer groups (individuals, SME businesses and financial agents). Data is collected using a random sample of customers, with interviews taking place each quarter by telephone.

The Programme arranged to have a RTI specific question added to the agents section of the survey in the December 2012 tranche of questions. During the fieldwork 217 agents dealt with PAYE were interviewed.

## RTI Agents' Awareness Tracking

### *Main Findings*

#### **Awareness**

- Overall awareness amongst Agents is 99%; This figure is universally high and does not depend upon the size of the agent or the time an agent has spent dealing with HMRC
- Both accountancy and book-keeping firms have similarly high levels of awareness

#### **Sources of information**

Those agents that are aware of RTI have heard of it from a very diverse range of sources - after HMRC direct mail (30%), software providers (23%) and trade press (20%) are the most common providers of information.

#### **Preparation for RTI**

Although most agents who are aware say that they intend to check the RTI website, only 40% actually have done. Around half of agents have checked or intend to check their clients' IT or payroll systems and half of agents will discuss RTI.

Less than half of agents aware intend to distribute HMRC guidance, and a similar proportion intend to create their own.

#### **Responsibility**

Two thirds of agents who are aware think the level of responsibility they have for their client's payroll will increase; almost all of the remainder think it will stay the same.

Accountancy firms (70%) are more likely than Bookkeepers (51%) to think RTI will lead to an increase in the level of responsibility the agents take on. The more clients a firm had, the more likely they were to believe the level of responsibility would increase.

#### **Level of Contact**

61% of agents who are aware of RTI think that their level of contact with customers will increase – and the more clients the agent has on their books, the more likely they are to expect an increase. Of those aware, accountancy firms (67%) are much more likely than book-keeping firms to think there will be an increase in contact (37%). Agents with less than a years experience of dealing with HMRC were less likely to think the level of contact they have with their clients will increase (43%).