



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
29th October 2012**

RTI Employer Awareness and Preparation 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 Employer Awareness and Preparation 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 14th May and 22nd June 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 June 2012 tranche of questions. During the fieldwork 565 agents were interviewed, of which 479 agents dealt with PAYE.

RTI Employer Awareness and Preparation Tracking

Main Findings

Awareness

- Overall awareness amongst Agents is 86%; but, while it is consistently high, there is a clear uplift as the size of the firm and the number of clients increase.
- Accountancy firms have significantly higher levels of awareness than book-keeping firms – 89% for accountants; 76% for bookkeepers.
- Agents that have been dealing with HMRC for less time have lower levels of awareness than more established firms, though once a firm has been trading for 5 years awareness flattens out.

Sources of information

Those agents that are aware of RTI have heard of it from a very diverse range of sources - after the HMRC website (22%), software providers (15%) and trade press (15%) 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, less than 1 in 5 actually have done. Around a third of agents intend to check their clients' IT or payroll systems and half of agents will discuss RTI although less than 1 in 5 intend to run a training session with their clients.

Over a third 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 (65%) are more likely than Bookkeepers (54%) to think RTI will lead to an increase in the level of responsibility the agents take on. The longer the firm has been dealing with HMRC, the higher the expectation of change.

Level of Contact

Slightly more than half (53%) 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 (61%) are much more likely than book-keeping firms to think there will be an increase in contact. The longer a firm has dealt with HMRC, the more likely they are to think the level of contact they have with their clients will increase.