



Department for  
Business & Trade

# Business Perceptions Survey Technical Annex 2022

Research Report

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# Methodology and sample profile

## Background

The Government is committed to ensuring the UK maintains a world class regulatory system which enables better outcomes for the economy, society, and the environment, at least cost to business. Since 2007, the Business Perception Survey (BPS) has provided evidence of businesses' views on regulation in the UK. The survey gives valuable insight into the impact that regulation has on businesses and helps to guide Government policy on ways in which this impact could be reduced.

This year's survey took place during the COVID-19 pandemic, which brought with it new regulations for both businesses and their employees. There have been several regulatory changes since the start of the COVID-19 pandemic which have had an effect on how businesses operate. The survey also took place after the transition period for the UK leaving the European Union (EU) had ended.<sup>1</sup> This means that some businesses need to comply with new or revised regulations.

The Business Perceptions Survey (BPS) provides BEIS with one source of information to assess how far the measures to reduce the impact of regulation have been felt by businesses and where there is a need to focus effort.

In 2016 and 2018, there was additional focus on specific areas of law that businesses might find burdensome, as well as businesses' perceptions of the specific regulators that they dealt with.

In 2020, the key changes to the questionnaire were more extensive probing around questions related to innovation. A new phrasing for innovation was used in 2020, which was broader in scope but also more precise in language. Instead of "innovative products and services" the phrasing used was "new or significantly improved products, processes or business models."

For the 2022 survey, questions were added to explore the extent to which businesses found EU Exit and COVID-19 regulations/regulatory changes challenging to comply with, and why/why not. In order to reflect the current landscape, the COVID-19 pandemic, the UK's exit from the EU and supply chain issues were also added to the list that was read out to businesses to ascertain whether they presented a challenge to their business.

The specific objectives of the 2022 BPS were to:

- Assess the impact that regulation has on businesses;
- Explore what aspects of regulation and regulatory delivery are most burdensome to businesses;

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<sup>1</sup> The transition period for the UK leaving the EU came to an end on 31<sup>st</sup> December 2020.

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- Measure the impact of the UK's exit from the EU and the impact of the Coronavirus pandemic;
  - Explore businesses' views on regulators in general.

## Methodology

For the main stage of the survey, a total of 2,000 telephone interviews, lasting an average of 25 minutes, were conducted using Computer Assisted Telephone Interviewing (CATI). Interviews were carried out between 5th January and 10th March 2022. As in previous waves, all interviews were conducted with the person at the business responsible for legal and compliance issues.

As there were some changes to the questionnaire for this wave, the survey was cognitively tested to check how the questionnaire flows and assess respondent understanding and comprehension of the new questions. A total of seven respondents took part in the cognitive testing. Testing showed that the questions were well understood by respondents, although the length of the interview was a concern for some. The purpose of the survey was made clearer by adding further information to the survey introduction and an explanation of what is meant by 'regulation' and 'regulator' were also added.

There was also a pilot testing phase consisting of 30 interviews, with monitoring and evaluation of the questionnaire flow and respondent understanding carried out by the research team. Data was then sense-checked, and pilot findings collated. Two very minor changes were made to the survey before progressing with the mainstage.

The sample was sourced from the Market Location commercial business database. A stratified random sampling approach was used, with businesses selected based on industry sector<sup>2</sup>, size, and UK nation.

The questionnaire used for the 2022 survey is included at the end of this report. It was structured as follows:

- Business profile, performance and challenges;
- Business perceptions of compliance with and burden of regulation;
- Government's approach to regulation;
- Dealings with regulators in general;
- Use and cost of external compliance support;
- Changes to the burden of regulation in the next year.

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<sup>2</sup> The sample covered all industries, apart from some public administration and defence sector exclusions (SIC O, T, U).

## Fieldwork

A total of 16,000 business contacts were drawn from the Market Location database.

In terms of the general management of the fieldwork process, contact details for respondents to get in touch with the IFF research team was provided, as were contact details for a contact at BEIS should respondents wish to confirm the bona fides of the research.

As in 2020, quotas were set by industry sector, size of business and country to ensure sufficiently robust sample sizes for sub-group analysis and comparison.

Table 1 shows the original interview targets and what was achieved, alongside the resulting sampling errors. Sampling errors shown are based on 50% of the group giving an answer, at the 95% confidence level.

While clearly some of the sample targets were not hit exactly, the comparability across waves was maintained, with minimal difference to the errors in comparison to previous waves.

**Table 1 Table of sample profile- by size, sector and country**

Sector	Target	Achieved	Sampling error
Total	2,000	2,000	±2.2%
Agriculture/Mining/Energy	200	209	±6.8%
Construction	200	208	±6.8%
Finance	200	164	±7.7%
Hotel/Catering	200	192	±7.1%
Manufacturing	200	223	±6.6%
Property/Management/Business Services	300	304	±5.6%
Public administration/Other	200	193	±7.1%
Retail/Distribution	300	311	±5.6%
Transport and Storage	200	196	±7.0%
<b>Size</b>			
Micro (1-9)	910	975	±3.1%
Micro (1-4)	505	527	±4.3%

Micro (5-9)	405	448	±4.6%
Small (10-49)	610	626	±3.9%
Medium (50-249)	260	244	±6.3%
Large (250+)	150	155	±7.9%
<b>Country</b>			
England	1,700	1,693	±2.4%
Wales	100	101	±9.8%
Scotland	150	152	±7.9%
Northern Ireland	50	54	±13.3%
<b>Total</b>		<b>2,000</b>	<b>±2.2%</b>

## Weighting

To maximise longitudinal comparability and address any distortions caused by the sampling approach, interviews were weighted to the true profile of UK private sector businesses with at least one employee. A weighting matrix was developed that interlocked business sector and size, with a RIM weight applied by country.<sup>3</sup> Weighted and unweighted counts are shown in Table 2 below.

**Table 2 Weighted and Unweighted counts- by sector, size and country**

Sector	Unweighted	Weighted
Total	2,000	2,000
Agriculture/Mining/Energy	209	83
Construction	208	257
Finance	164	34
Hotel/Catering	192	199
Manufacturing	223	125
Property/Management/Business Services	304	456

<sup>3</sup> Business Population Estimates 2021, BEIS

Public administration/Other	193	428
Retail/Distribution	311	341
Transport and Storage	196	77
<b>Size</b>		
Micro (1-9)	975	1,641
<i>Micro (1-4)</i>	527	1,270
<i>Micro (5-9)</i>	448	371
Small (10-49)	626	297
Medium (50-249)	244	50
Large (250+)	155	11
<b>Country</b>		
England	1,693	1,735
Wales	101	79
Scotland	152	135
Northern Ireland	54	52
<b>Total</b>	<b>2,000</b>	<b>2,000</b>

Any weighting of survey data produces a design effect as a result of adjusting the dataset to be representative of the underlying population. This effect reduces the effective base size of the overall total from 2,000 to 902. Therefore, the sampling errors shown in Table 1 are approximations only.

## Call outcomes

Table 3 shows the breakdown of call outcomes for the telephone fieldwork. The response rate was 15%, higher than the 11% recorded in 2020, which was expected due to the fact the fieldwork for the 2020 survey took place over a national lockdown period as a result of the COVID-19 pandemic.

**Table 3 Call outcomes during fieldwork**

	<b>Total</b>
Completed interviews	<b>2,000</b>
	<b>15%</b>
Refused	<b>3,203</b>
	<b>24%</b>
Number unobtainable	<b>1,614</b>
	<b>12%</b>
Not available during interviewing period	<b>574</b>
	<b>4%</b>
Active records at close	<b>4,414</b>
	<b>33%</b>
Ineligible	<b>1,618</b>
	<b>12%</b>
<b>Total</b>	<b>13,423</b>

## Changes to the questionnaire

As longitudinal comparison is critical to the aims of this survey, much of the methodology remains the same as in previous waves: i.e. sampling, questionnaire design, fieldwork and weighting process.

Where there were additional questions, time-series comparisons with previous surveys are not valid and are therefore not included in the report.

The following questions and statements were added or amended (question numbers in brackets):



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- When businesses were asked if they had experienced a list of challenges, new statements were added for the COVID-19 pandemic, UK exit from the EU, and supply chain issues (A7).
  - Businesses were asked the extent to which they found complying with regulation surrounding COVID-19 challenging, and why/why not (C4-C6).
  - Businesses were asked the extent to which they found complying with regulation surrounding EU Exit challenging, and why/why not (C7-C9).
  - Businesses were asked whether the regulators that they had most contact with actively support the introduction of new or significantly improved products, processes or business models (D2)
  - Businesses were asked which regulator their company has had the most contact with in the last 12 months (D3a)

The following questions were removed (question numbers in brackets):

- Asking businesses to explain why complying with regulation is the greatest challenge to their business, if applicable (A10)
- Asking businesses to explain why the implementation of a new or improved product, process or business model is the greatest challenge to their business, if applicable (A11)
- Asking businesses whether the way a regulator behaves can affect various aspects, such as how easy it is for their business to comply and how much it costs them to comply (D1)
- Where a business said the way a regulator behaves can affect the implementation of a new or significantly improved product, process or business model, asking them to explain how (D1A)
- Where a business said the way a regulator behaves can affect implementation of a new or significantly improved product, process or business model, asking them why that is (D1B)
- Where businesses use external business advisers or consultants for multiple reasons, asking them which is the main reason (E6)
- Asking businesses why they think the regulatory burden on their business will increase/decrease, or why they are unsure (F2-F4)

## Key Driver Analysis

IFF Research conducted a key driver analysis to ascertain the factors which most impact businesses to perceive regulation as an obstacle to their success. The answers to this question, on a five-point agree to disagree scale<sup>4</sup>, were used as the dependent variable in the

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<sup>4</sup> The response scale consisted of 'strongly agree', 'tend to agree', 'neither agree nor disagree', 'tend to disagree' and 'strongly disagree'.

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model. A linear regression model was used; the general equation for this type of model is presented below.

$$Y = a + b_1X_1 + b_2X_2 + b_3X_3 + b_4X_4 \dots + e$$

Responses to a range of other potentially relevant questions were modelled using an iterative regression method to provide a ranking of which responses to these other questions had the strongest correlation to agreement with the dependent variable.

The model did not include all variables in the questionnaire, though most were included. Variables were selected for testing based on their perceived relevance to the dependent variable. The Durbin Watson statistic is an indicator of whether correlation between variables is an issue for the model. The value for the current model was 1.933, with 2 being the ideal figure, showing that this was not an issue.

The variables below were tested for correlation. The model initially included all of these variables but iteratively removed those that were not found to be statistically significant. The final base size for the model was 1,959.

- Business characteristics (size, length of time established, region)
- Whether experienced any of the 8 challenges to the business (A7)
- Attitudes towards regulation (B1)
- Days spent dealing with regulation (B2)
- Total cost of regulation (B3)
- Aspects of regulation that might be a burden (B4)
- Attitudes towards Government approach to regulation (C1)
- How challenging they found it complying with Covid-19 regulation (C4)
- How challenging they found it complying with EU exit regulation (C7)
- Attitudes towards regulators (D2)
- Money spent on external advisors (E4)

Different approaches were used in order to include respondents that gave “Don’t know” and “Not applicable” answers in the model<sup>5</sup>:

- For all agree/disagree scales NA and DK (generally a small proportion) recoded as neither in order to keep people in the model.
- At A7, those who put Don’t know were coded as No.
- At B1: the Don’t Know and Not Applicable answers were removed, as there was not a middle point on the scale.

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<sup>5</sup> The approach taken depended on the response options available to the respondent. The purpose is to include as many respondents in the model as possible, without giving their response a different meaning to the one intended.

The R squared value of the model was 0.26, meaning it explained 26% of the variance in attitudes towards regulation. While this means that a lot of variance remains unexplained, statistical models are a simplified representation of a very complex world and consequently R-squared values tend to be quite moderate. In this context a value of 0.26 can be regarded as acceptable. The models are of value in helping to understand which of the factors observed are driving the dependent variable and of those that are which have a larger and which a smaller effect.

	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
(Constant)	2.089	0.294		7.100	0.000
Access to finance	0.153	0.075	0.041	2.052	0.040
Level of tax	0.090	0.051	0.037	1.763	0.078
Regulation preventing or hindering implementation of a new or significantly improved product process or business model	0.126	0.058	0.046	2.164	0.031
Saving my business money	0.062	0.025	0.049	2.464	0.014
The length of time it takes to go through the whole process of complying	-0.129	0.031	-0.115	-4.153	0.000
Keeping up to date with information about which regulations your business has to comply with	-0.045	0.027	-0.042	-1.642	0.101
Completing paperwork, filling out forms and keeping records on facts and figures	-0.069	0.027	-0.065	-2.578	0.010

Having to provide the same information more than once	-0.067	0.025	-0.063	-2.698	0.007
Would you say that the total cost of complying with regulation has...?	-0.041	0.027	-0.031	-1.499	0.134
Establishing whether a new product, process or business model are compliant with regulation	-0.077	0.027	-0.066	-2.797	0.005
It is easy to comply with regulations	0.104	0.027	0.093	3.865	0.000
Most regulation is fair and proportionate	0.126	0.028	0.108	4.562	0.000
The Government understands business technology and industry well enough to regulate	0.046	0.027	0.041	1.717	0.086
The Government's approach to regulation facilitates the implementation of new or significantly improved products processes or bus.	0.048	0.030	0.036	1.576	0.115
Found COVID-19 regulations/regulatory changes challenging to comply with?	0.069	0.024	0.060	2.905	0.004
I have confidence that I can rely on the advice and guidance regulators provide	0.081	0.027	0.070	3.028	0.002

# Survey Results

## Business profile, performance and challenges

A1: How many people, excluding the owner, are employed by your organisation? Please include anyone who works for the organisation, even if they work in a different location or plant to you.

	2022	2020	2018	2016	2014	2012	2010	2009 (NAO)
Base: All respon dents	2,000	2,014	2,001	2,000	2,203	2,294	2,000	1,000
None	-	-	-	-	-	25%	30%	31%
1-4	64%	63%	63%	62%	63%	39%	44%	36%
5-9	19%	19%	18%	19%	19%	22%	15%	12%
10-19	8%	8%	9%	9%	9%	7%	6%	9%
20-49	7%	7%	6%	7%	7%	6%	3%	7%
50-99	1%	1%	1%	1%	1%	0%	1%	2%
100- 249	1%	1%	1%	1%	1%	0%	0%	1%
250- 499	0%	0%	0%	0%	0%	0%	0%	0%
500- 999	0%	0%	0%	0%	0%	0%	0%	0%
1,000+	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	-	-	-	-	-	1%	0%	0%

A2/A3: What is the main business activity of your company?

	2022	2020	2018	2016	2014	2012	2010	2009 (NAO)
Base: All respondents	2,000	2,014	2,001	2,000	2,203	2,294	2,000	1,000
Agriculture/ Mining/ Energy	4%	4%	4%	5%	4%	3%	6%	6%
Construction	13%	12%	12%	12%	12%	19%	12%	10%
Finance	2%	2%	2%	2%	2%	2%	1%	2%
Hotel/ Catering	10%	10%	10%	10%	10%	3%	11%	7%
Manufacturing	6%	6%	6%	7%	7%	6%	12%	6%
Property/ Management/ Business Services	23%	23%	23%	23%	29%	34%	13%	29%
Administration/ Other services	21%	22%	22%	22%	14%	18%	29%	17%
Retail/ Distribution	17%	17%	18%	19%	19%	11%	13%	19%
Transport and Storage	4%	4%	3%	3%	3%	5%	4%	4%

A4: Roughly how long has your company been in existence?

	2022	2020	2018	2016	2014	2012	2010	2009 (NAO)
Base: All respondents	2,000	2,014	2,001	2,000	2,203	2,294	2,000	1,000
Less than a year	3%	6%	2%	0%	1%	2%	4%	2%
1-3 years	8%	19%	6%	10%	8%	10%	10%	14%
4-5 years	4%	13%	9%	8%	6%	9%	10%	10%

6-20 years	21%	49%	45%	46%	44%	47%	41%	41%
More than 20 years	64%	13%	38%	34%	42%	32%	34%	32%
Don't know	0%	0%	0%	1%	0%	0%	0%	0%

A5: In the past 12 months did your business export any products or services outside of the UK?

	2022	2020	2018	2016
Base: All respondents	2,000	2,014	2,001	2,000
Yes – to countries in the EU	12%	22%	16%	30%
Yes – to countries outside of the EU	8%	16%	13%	23%
No (only sell within the UK)	86%	75%	80%	-
Don't know	0%	1%	0%	-

A6: I am going to read out some statements and I would like you to tell me for each statement whether it applies to your business. So, compared to this time last year have you...?

	2022	2020	2018	2016	2014
Base: All respondents	2,000	2,014	2,001	2,000	2,203
_1 Increased your staff headcount	18%	32%	25%	30%	23%
_2 Increased the amount you export to other countries	3%	8%	6%	9%	8%
_3 Started offering new products or services	20%*	34%*	27%	39%	34%
_4 Started working in new business markets	12%	24%	20%	25%	19%
_5 Increased your sales turnover	41%	57%	50%	50%	45%
_6 Increased your capital investment	26%	39%	32%	42%	34%
_7 Reduced your staff headcount	20%	16%	13%	17%	18%
_8 Seen a decrease in your sales turnover	34%	22%	18%	29%	27%

\*wording changed from 2020 onwards to “Implemented a new or significantly improved product, process or business model”

A7: I am going to read out some challenges which may affect your business. Please indicate which of these, if any, present a challenge to your business:

	2022	2020
Base: All respondents	2,000	2,014
Coronavirus (COVID-19) pandemic	74%	-
Supply chain issues	62%	-
UK exit from the EU	41%	-
Attracting and retaining customers	38%	46%
Complying with regulation (excluding tax administration)	35%	33%
Staff recruitment and / or retention	35%	31%
Level of tax	33%	36%
Administration around tax	22%	25%
Regulation preventing or hindering implementation of a new or significantly improved product	22%	21%
Access to finance	12%	27%
Staff redundancies	7%	9%



A9: Excluding tax administration, which ONE would you say presents the greatest challenge to your business?

	2022	2020	2018	2016	2014
Base: All respondents	Base: All other than tax administration or none of the challenges (1,900)	Base: All other than tax administration or none of the challenges (1,638)	2,001	2,000	2,203
Coronavirus (COVID-19) pandemic	34%	-	-	-	-
Supply chain issues	21%	-	-	-	-
UK exit from the EU	9%	-	-	-	-
Access to finance	2%	12%	8%	10%	12%
Complying with regulation	6%	11%	17%	15%	11%
Level of tax	3%	14%	17%	18%	17%
Staff recruitment and/or retention	13%	16%	17%	16%	9%
Staff redundancies	*%	0%	2%	1%	3%
Attracting and retaining customers	8%	31%	32%	36%	45%
Something else	1%	7%	2%	1%	2%
Don't know	*%	1%	1%	0%	0%

None of these	-	-	5%	3%	-
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## Business perceptions of compliance with and burden of regulation

B1: How important are the following factors in encouraging your business to comply with regulation?

Base: All respondents 2022: 2,000 2020: 2,014 2018: 2,001 2016: 2,000								
	Essential	Very important	Fairly important	Not very important	Not at all important	Don't know	N/A	
_1 Maintaining my reputation with customers	2022	50%	43%	5%	1%	1%	*%	*%
	2020	57%	37%	4%	1%	1%	*%	*%
	2018	49%	42%	5%	1%	1%	0%	0%
	2016	61%	34%	3%	1%	0%	0%	0%
_2 Giving my business a competitive advantage	2022	24%	37%	25%	8%	3%	2%	2%
	2020	29%	41%	19%	6%	3%	1%	1%
	2018	25%	40%	21%	7%	4%	1%	2%
	2016	32%	38%	19%	6%	3%	1%	1%
_3 Delivering social benefits by protecting staff, customers and the environment	2022	25%	36%	25%	8%	4%	1%	2%
	2020	27%	38%	24%	7%	2%	1%	2%
	2018	23%	37%	25%	9%	3%	2%	2%
	2016	43%	39%	13%	2%	1%	0%	1%
_4 Avoiding sanctions due to non-compliance	2022	38%	33%	12%	6%	5%	3%	4%
	2020	42%	33%	11%	7%	3%	1%	3%

	2018	37%	38%	10%	5%	5%	2%	3%
	2016	44%	32%	13%	4%	3%	2%	3%
_5 Saving my business money	2022	30%	41%	20%	3%	3%	1%	1%
	2020	31%	38%	21%	6%	2%	1%	1%
	2018	31%	44%	15%	5%	3%	1%	0%
	2016	33%	42%	18%	3%	3%	1%	1%
_6 Complying with the law	2022	54%	39%	5%	1%	1%	*%	*%
	2020	62%	32%	4%	1%	1%	1%	*%
	2018	57%	36%	5%	1%	0%	0%	0%
	2016	55%	36%	8%	1%	0%	0%	0%
_7 Meeting insurance requirements	2022	45%	37%	11%	4%	2%	1%	*%
	2020	48%	33%	13%	4%	1%	*%	*%
	2018	42%	41%	12%	3%	2%	0%	1%
	2016	51%	32%	10%	4%	1%	0%	1%
_8 Meeting supply chain requirements	2022	22%	33%	19%	10%	5%	2%	10%
	2020	26%	29%	19%	10%	6%	2%	9%
	2018	23%	33%	19%	9%	6%	2%	8%
	2016	26%	29%	20%	7%	5%	2%	10%

B2: On average, how many days in total do you or other staff spend per month dealing with, or learning to comply with, all regulation? This does not include any time spent by external contractors.

	2022	2020	2018	2016
Base: All respondents	2,000	2,014	2,001	2,000
No time at all	5%	5%	6%	9%
Less than half a day	7%	8%	13%	9%
Half a day to a day	9%	8%	16%	14%
1 - 2 days	28%	26%	29%	33%
3 - 4 days	15%	16%	11%	10%
5 - 10 days	14%	14%	8%	9%
11 - 20 days	6%	6%	3%	4%
21 - 50 days	6%	8%	5%	5%
More than 50 days	2%	3%	2%	1%
Don't know	8%	6%	7%	5%
Refused	0%	0%	0%	0%

B3: We'd now like you to think about whether the cost to your business of complying with regulation has changed. In addition to the staff time you have just described, please also consider any other direct costs such as external contractors, purchasing new equipment or IT systems etc. So, thinking about the last 12 months, would you say the total cost of complying with regulation has...?

	2022	2020	2018	2016
Base: All respondents	2,000	2,014	2,001	2,000
Decreased a lot	*%	1%	1%	1%
Decreased a little	1%	2%	0%	2%
Stayed the same	38%	40%	42%	42%
Increased a little	33%	34%	30%	32%

Increased a lot	25%	20%	23%	21%
Don't know	2%	4%	4%	3%

B4: I will now read out a series of activities your company might undertake and I would like you tell me to what extent you agree or disagree that they are a burden when complying with regulation. By agreeing with a statement, you are indicating that the activity is a burden.

Base: All respondents								
2022: 2,000								
2020: 2,014								
2018: 2,001								
		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know	N/A
_1 The length of time it takes to go through the whole process of complying	2022	2%	19%	18%	39%	19%	1%	2%
	2020	5%	21%	18%	36%	17%	1%	2%
	2018	4%	18%	16%	40%	19%	2%	1%
_2 Keeping up to date with information about which regulations your business has to comply with	2022	2%	21%	11%	43%	21%	1%	1%
	2020	5%	24%	14%	38%	17%	1%	1%
	2018	5%	19%	14%	38%	22%	2%	1%
_3 Completing paperwork, filling out forms and keeping records on facts & figures	2022	2%	23%	15%	37%	21%	*%	1%
	2020	4%	24%	16%	38%	16%	1%	2%
	2018	4%	21%	11%	38%	24%	1%	1%
_4 Having to provide the same information more than once	2022	3%	20%	13%	38%	22%	1%	3%
	2020	6%	21%	16%	35%	18%	1%	2%
	2018	4%	17%	12%	37%	26%	1%	3%
_5 Being ready for or dealing with inspections	2022	3%	29%	18%	30%	13%	1%	5%
	2020	8%	30%	19%	26%	10%	1%	6%
	2018	6%	24%	16%	32%	14%	1%	6%
	2022	3%	27%	19%	26%	11%	1%	12%

_6 Obtaining licenses or permits	2020	6%	29%	20%	24%	9%	1%	10%
	2018	7%	24%	18%	27%	13%	2%	10%
_7 Understanding the differences in regulation between England, Scotland, Wales and Northern Ireland	2022	7%	27%	17%	19%	8%	3%	20%
	2020	10%	29%	21%	15%	6%	3%	15%
	2018	10%	23%	17%	15%	8%	5%	23%
_8 Establishing whether a new product, process or business model are compliant with regulation	2022	3%	23%	21%	30%	8%	3%	12%
	2020	6%	28%	22%	24%	10%	1%	8%
	-	-	-	-	-	-	-	-

## Government's approach to regulation

C1: To what extent do you agree or disagree with the following statements about the Government's approach to regulating?

Base: All respondents								
2022: 2,000								
2020: 2,014								
2018: 2,001								
		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know	N/A
_1 Generally it is clear what the purpose of regulation is	2022	6%	24%	14%	51%	4%	1%	*%
	2020	5%	16%	14%	59%	5%	2%	*%
	2018	7%	20%	12%	53%	4%	3%	1%
_2 It is easy to comply with regulations	2022	8%	37%	18%	33%	2%	1%	1%
	2020	7%	30%	16%	40%	4%	2%	1%
	2018	10%	32%	15%	37%	3%	2%	1%
_3 Most regulation is fair and proportionate	2022	6%	24%	22%	42%	3%	3%	1%
	2020	5%	19%	21%	48%	3%	3%	1%
	2018	9%	25%	17%	41%	3%	4%	1%

_4 The Government understands business well enough to regulate	2022	12%	36%	18%	26%	2%	6%	1%
	2020	12%	28%	23%	30%	2%	3%	2%
	2018	17%	35%	16%	25%	2%	5%	1%
_5 The Government consults well with business before any new regulation, or change to an existing regulation, is introduced	2022	16%	39%	15%	21%	2%	5%	1%
	2020	14%	31%	22%	24%	1%	7%	2%
	2018	16%	34%	17%	22%	1%	8%	2%
_6 Government informs businesses of regulatory changes clearly and with sufficient warning	2022	12%	34%	15%	33%	2%	3%	1%
	2020	10%	27%	16%	41%	3%	3%	1%
	2018	11%	29%	12%	40%	3%	5%	1%
_7 Regulators have sufficient resources to adequately enforce non-compliance	2022	6%	21%	20%	33%	4%	14%	1%
	2020	7%	19%	23%	35%	4%	10%	2%
	2018	8%	20%	17%	34%	3%	16%	2%
_8 The Government's approach to regulation facilitates innovative products and services being efficiently brought to market*	2022	5%	25%	30%	24%	1%	10%	5%
	2020	6%	20%	35%	27%	2%	7%	4%
	2018	7%	24%	23%	28%	2%	10%	7%
_9 The Government's approach to regulation facilitates efficient access to international trade opportunities	2022	4%	14%	28%	16%	1%	12%	25%
	2020	5%	13%	30%	20%	1%	8%	22%
	2018	5%	13%	21%	18%	1%	11%	30%
_10 Regulators work in a joined-up way and cooperate effectively with one another	2022	12%	34%	20%	21%	1%	10%	2%
	2020	11%	31%	24%	22%	1%	8%	3%
	-	-	-	-	-	-	-	-

\*wording altered from 2020 onwards to “The Government's approach to regulation facilitates the implementation of new or significantly improved products, processes or business models”

C2: To what extent do you agree or disagree that the overall level of regulation in the UK is an obstacle to your business's success? Do you...?

	2022	2020	2018	2016	2014	2012	2010	2009 (NAO)
Base: All respondents	2,000	2,014	2,001	2,000	2,203	2,294	2,000	1,000
Strongly agree	17%	10%	15%	21%	15%	24%	32%	35%
Tend to agree	28%	27%	25%	29%	35%	30%	27%	27%
Neither agree nor disagree	28%	30%	32%	25%	10%	16%	8%	8%
Tend to disagree	20%	24%	20%	19%	33%	23%	24%	24%
Strongly disagree	5%	8%	7%	6%	5%	5%	7%	6%
Don't know	2%	2%	2%	1%	1%	1%	2%	1%

C3: Why do you [INSERT RESPONSE OPTION FROM C2] that the overall level of regulation in the UK is an obstacle to your business's success?

	2022	2020
Base: All who selected agree or strongly agree	949	798
Too much time spent on compliance	28%	35%
Costs of compliance are too high	13%	21%
Excessive volume of regulation in general	21%	16%
Volume of regulation disproportionate for small businesses	11%	11%
Lack of communication from government / regulators	9%	9%
Regulations lack clarity	7%	7%
Regulations are too complex	10%	6%
Lack of consistency across regulators	6%	5%
Advice from regulators/ government is unclear	2%	5%



Regulations don't always reflect industry best practice	12%	5%
Regulations frequently change	13%	5%
Lack of support for small businesses	1%	5%
Regulations don't always apply / not relevant	7%	4%
Regulations have slowed down business development / innovation	6%	4%
Uncertainty surrounding Brexit (agree)	-	3%
Impact of exit from the EU (negative)	5%	-
Slows down processes	5%	3%
Regulations are restrictive / too rigid	4%	3%
Not all companies abide by legislation / not a level playing field	3%	2%
Accepts as necessary in some circumstances	1%	-
Other (agree)	11%	18%
Other	-	*%
Don't know	8%	7%

	2022	2020
Base: All who neither agreed nor disagreed	554	567
Does not impact business on a day-to-day basis	27%	24%
Accepts as necessary in some circumstances	30%	18%
Other (neutral)	8%	17%
Regulations are there for a reason / there to protect us / clients	4%	9%
Too much time spent on compliance	1%	3%
We have processes in place to manage regulation	1%	2%
Regulations are easy to implement / understand	*%	2%
Regulations don't always apply / not relevant	1%	2%

Compliance gives us an edge over competitors	*0%	2%
Lack of communication from government / regulators	2%	2%
Regulations don't always reflect industry best practice	3%	2%
Costs of compliance are too high	1%	2%
Industry standard - retains professionalism	2%	2%
Regulations frequently change	2%	1%
Regulations are too complex	*0%	1%
Regulations have slowed down business development / innovation	*0%	1%
Slows down processes	*0%	1%
Not all companies abide by legislation / not a level playing field	1%	1%
Excessive volume of regulation in general	*0%	1%
Uncertainty surrounding Brexit (agree)	-	1%
Regulations lack clarity	2%	-
Regulations are restrictive / too rigid	2%	-
Impact of exit from the EU (neutral)	2%	-
Volume of regulation disproportionate for small businesses	1%	-
Advice from regulators/ government is unclear	1%	-
Lack of consistency across regulators	1%	1%
Other (agree)	-	1%

	2022	2020
Base: All who disagreed or strongly disagreed	465	624
Does not impact business on a day-to-day basis	43%	38%
Regulations are there for a reason / there to protect us / clients	21%	28%
We have processes in place to manage regulation	9%	10%

Industry standard - retains professionalism	6%	6%
Regulations are easy to implement / understand	7%	5%
Information / support available to businesses	2%	4%
Compliance gives us an edge over competitors	2%	3%
Uncertainty surrounding Brexit (disagree)	-	1%
Accepts as necessary in some circumstances	1%	-
Impact of exit from the EU (positive)	1%	-
Other (disagree)	3%	14%
Other	-	2%
Don't know	19%	14%

C4: To what extent did you find COVID-19 regulations/regulatory changes challenging to comply with?

2022	
Base: All respondents	2,000
Very challenging	24%
Quite challenging	37%
Not very challenging	22%
Not at all challenging	16%
Don't know	1%
Refused	*%

C5: Why did you find it challenging?

2022	
Base: All who found COVID-19 compliance challenging	1,264
It created operational problems for the business (including staffing issues)	44%
It was difficult to find out about and keep up to date with changes to the regulation / guidance	25%
The regulation / guidance was not sufficiently detailed	24%
It had a negative impact on my business model (e.g. reduced level of business activity)	24%
I found complying with it stressful or challenging	17%
It added considerable financial cost to the business	14%
It was excessively time consuming	13%
The regulation / guidance was too prescriptive	6%
Ensuring others (e.g. staff, customers) complied with regulations	6%
Increased paperwork	1%
Other	5%
Don't know	1%
Refused	2%

C6: Why did you not find complying with regulations or regulatory changes during Covid-19 to be challenging?

2022	
All who did not find COVID-19 compliance challenging	708
The regulation / guidance was sufficiently detailed; it was easy to understand what actions the business should take	20%
Minimal impact on business operations (unspecified)	19%

Minimal impact as a small business	14%
Measures / contingency plan were already in place	10%
Just got on with it	10%
Business / industry still operational	7%
Change to home working was smooth	5%
Safety of staff / customers most important factor	5%
Staff already work individually / in small teams	5%
Business largely based outdoors	4%
Most staff on furlough / business closed	2%
Not a public / client facing business	2%
Easy to acquire resources needed (e.g. screens, PPE, sanitiser)	2%
Other	7%
Don't know	2%
Refused	2%

C7: To what extent did you find EU exit regulations/regulatory changes challenging to comply with?

2022	
Base: All respondents	2,000
Very challenging	12%
Quite challenging	16%
Not very challenging	16%
Not at all challenging	32%
Not applicable	22%
Don't know	1%
Refused	*%

## C8: Why did you find it challenging?

2022	
Base: All who found EU exit compliance challenging	696
It created operational problems for the business (including staffing issues)	51%
It added considerable financial cost to the business	29%
It was excessively time consuming	19%
The regulation / guidance was not sufficiently detailed	17%
It had a negative impact on my business model (e.g. reduced level of business activity)	15%
It was difficult to find out about and keep up to date with changes to the regulation / guidance	15%
Increased paperwork	11%
I found complying with it stressful or challenging	9%
The regulation / guidance was too prescriptive	3%
Other	6%
Don't know	2%

## C9: Why did you not find complying with regulations or regulatory changes as a result of the UK leaving the EU to be challenging?

2022	
Base: All who did not find EU exit compliance challenging	880
Business doesn't trade internationally	42%
No impact on our business (unspecified)	36%
Not directly impacted by complying with regulation, but impacted by other aspects of UK exit from EU	12%
Changes to regulations were minimal	3%

The regulation / guidance was sufficiently detailed; it was easy to understand what actions the business should take	2%
Made changes before the UK left the EU	1%
Just got on with it	1%
Other	2%
Don't know	3%
Refused	1%

## Regulators

D2. To what extent do you agree or disagree with the following statements regarding regulators?

Base: All businesses								
2022: 2,000								
2020: 2,014		Strongly Disagree	Disagree	Neither Agree nor	Agree	Strongly Agree	Don't know	N/A
Regulators provide advice and guidance that helps my business to comply	2022	5%	17%	20%	46%	3%	5%	4%
	2020	4%	14%	18%	49%	4%	4%	8%
Guidance published by regulators is easy to locate	2022	7%	25%	15%	44%	3%	4%	3%
	2020	5%	24%	15%	42%	6%	3%	6%
The process to appeal against a decision made by regulators is easy and transparent	2022	6%	18%	26%	14%	1%	19%	16%
	2020	6%	17%	28%	18%	2%	15%	14%
	2022	6%	20%	18%	44%	4%	5%	4%

I have confidence that I can rely on the advice and guidance regulators provide	2020	5%	14%	18%	48%	6%	3%	6%
Regulators are easily accessible	2022	8%	30%	19%	31%	1%	8%	4%
	2020	6%	22%	21%	37%	3%	5%	6%
Regulators provide timely responses	2022	7%	25%	22%	28%	1%	10%	7%
	2020	6%	21%	25%	30%	3%	7%	10%
Regulators understand my business well enough to provide advice that is tailored to my circumstances	2022	13%	31%	19%	25%	2%	6%	4%
	2020	10%	28%	19%	27%	4%	5%	7%
Regulators cooperate effectively with one another	2022	6%	25%	24%	20%	1%	18%	5%
	2020	5%	21%	29%	20%	1%	13%	11%

D3a: Could you tell me the regulator with which your company has had the most contact in the last 12 months?

2022	
Base: All businesses	2,000
Her Majesty's Revenue and Customs (HMRC)	16%
Local authority (unspecified)	9%
General trade bodies/professional associations	8%
Health and Safety Officers from my Local Council (Local)	5%
Health and Safety Executive (National)	5%
Government departments	4%



Environmental Health (Local)	3%
Driver and Vehicle Standards Agency	2%
Financial Conduct Authority (FCA)	2%
Environment Agency (National)	1%
Information Commissioner	1%
The Pensions Regulator (TPR)	1%
DEFRA	1%
Care Quality Commission	1%
Trading Standards	1%
Food Standards Agency (National)	1%
OFSTED (The Office for Standards in Education, Children's Services and Skills)	1%
Food Safety Officers from my Local Council (Local)	*%
Solicitors Regulation Authority (SRA)	*%
Fire Safety (Local)	*%
Vehicle Certification Agency	*%
Fire and Rescue Authorities in England (National)	*%
Office for Product Safety and Standards (OPSS)	*%
Police	*%
Other	8%
Don't know	11%
None	19%

D3: Your business has a classification which may mean it is regulated by the Office for Product Safety and Standards (OPSS). In the last 12 months have you:

	2022	2020
Base: All who may have had contact with OPSS	293	298
Received or obtained advice or guidance from OPSS	1%	1%
Interacted with OPSS but not received advice or guidance	1%	0%
Had no interaction with OPSS	83%	80%
Have never heard of OPSS	12%	12%
Don't know	4%	6%

D4: Thinking about OPSS I'd like you to tell me to what extent you agree or disagree with each of the following statements.

Base: All who interacted with OPSS in the last 12 months		Strongly Disagree	Disagree	Neither Agree nor	Agree	Strongly Agree	Don't know	N/A
2022: 11								
2020: 6								
OPSS provides advice and guidance that helps my business to comply	2022	0%	9%	12%	76%	1%	2%	0%
	2020	0%	19%	0%	79%	0%	1%	0%
Guidance published by OPSS is easy to locate	2022	9%	12%	9%	58%	1%	9%	2%
	2020	1%	31%	4%	64%	0%	*%	0%
I have confidence that I can rely on the advice and guidance OPSS provides	2022	9%	0%	20%	31%	1%	37%	2%
	2020	1%	4%	16%	79%	0%	*%	0%
OPSS is easily accessible*	2022	9%*	0%	13%	66%	0%	11%	0%

	2020	1%	31%	0%	68%	0%	*%	0%
OPSS provides timely responses	2022	9%	0%	25%	18%	0%	48%	0%
	2020	19%	61%	3%	16%	0%	*%	0%
OPSS understands my business well enough to provide advice that is tailored to my circumstances	2022	0%	21%	4%	63%	1%	11%	0%
	2020	20%	44%	0%	35%	0%	*%	0%
OPSS cooperates effectively with other regulators	2022	0%	0%	35%	54%	1%	9%	2%
	2020	1%	64%	19%	0%	0%	16%	0%
OPSS actively supports the introduction of new or significantly improved products processes or business models	2022	0%	0%	20%	31%	1%	48%	0%
	2020	-	-	-	-	-	-	-

\*wording updated in 2022 to “OPSS is easy to contact”

## Communications

E1: Which, if any, of the following do you use to help the business in complying with regulation?

	2022	2020	2018	2016
Base: All respondents	2,000	2,104	2,001	2,000
Inspectors or Regulatory Officers	30%	41%	29%	31%
Any official Government or Regulator websites	65%	71%	53%	65%
Any external business advisers or consultants (e.g. accountants, lawyers, specialist consultants, etc.)	68%	76%	64%	71%
Any Trade Associations / Business Organisations	54%	55%	46%	53%

Friends, family and other personal contacts (including business peers)	49%	56%	41%	54%
Inspectors or Regulatory Officers	30%	-	-	-
Websites (unspecified)	1%	2%	0%	1%
Other	2%	2%	1%	1%
None of these	6%	4%	7%	5%
Don't know	1%	0%	3%	0%

E4: And, in the last year, approximately how much have you spent using external business advisers or consultants to help with complying with regulations?

	2022	2020	2018	2016
Base: All using external business agents	1,491	1,614	1,357	1,530
Nothing	7%	8%	3%	2%
Under £500	6%	6%	7%	8%
£500 - £999	7%	10%	9%	9%
£1,000 - £4,999	39%	33%	31%	36%
£5,000 - £9,999	13%	15%	13%	17%
£10,000 - £19,999	9%	9%	7%	11%
£20,000 - £49,999	3%	6%	5%	5%
£50,000 or more	2%	3%	2%	3%
Don't know	10%	10%	22%	9%
Prefer not to say	2%	-	-	-

E5: Why does your business use external business advisers or consultants to help with complying with regulations? Is it because...?

	2022	2020	2018	2016
Base: All using external business agents	1,491	1,619	1,357	1,530
You lack time or internal resource	64%	67%	58%	76%
The advice from regulators is insufficient	37%	35%	30%	42%
There is a lack of clarity about the legal requirements	55%	54%	39%	58%
You want assurance (i.e. that you are compliant)	87%	88%	70%	80%
You want independent advice	76%	80%	62%	82%
You are worried about penalties for non-compliance	72%	73%	59%	76%
They have more knowledge or are more specialist	87%	91%	80%	92%
It is a legal requirement to do so	1%	2%	1%	2%
Cost issues	1%	1%	0%	1%
To demonstrate/prove compliance	1%	-	-	-
Any other reason	-	2%	3%	2%
Don't know	2%	1%	2%	2%

## Future burden of regulation

F1: In the next 12 months, do you think that the burdens resulting from regulation will decrease, stay the same, or increase?

	2022	2020	2018	2016	2014	2012	2010	2009 (NAO)
Base: All respondents	2,000	2,014	2,001	2,000	2,203	2,294	2,000	1,000
Decrease a lot	2%	2%	1%	1%	2%	8%	3%	4%
Decrease a little	6%	5%	2%	2%	5%			
Stay the same	41%	40%	35%	39%	44%	47%	34%	37%

---

Increase a little	28%	26%	29%	31%	26%	38%	46%	53%
Increase a lot	17%	19%	24%	21%	16%			
Don't know	6%	8%	9%	6%	7%	7%	17%	6%

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# Questionnaire

Business Perception Survey 2022

J11576

QUESTIONNAIRE

Telephone

S Screener

ASK TELEPHONIST

S1 Good morning / afternoon. My name is NAME and I'm calling from IFF Research, an independent market research company on behalf of the Department for Business, Energy & Industrial Strategy (BEIS).

May I speak to the person in your company who is responsible for legal and compliance issues?

IF MORE THAN 50 EMPLOYEES (IF SIZE=4-5): This might be a senior member of the Legal or Compliance department.

IF LESS THAN 50 EMPLOYEES (IF SIZE=1-3): This might be the owner, managing director or company secretary.

ADD IF NECESSARY: We are looking to speak to the person who is able to speak knowledgeably on behalf of the company about the rules and regulations that affect all UK businesses.

ONCE THROUGH TO THE CORRECT PERSON:

BEIS is carrying out an independent evaluation of the effect of regulation on businesses such as yours. Participating in this survey gives you the opportunity to provide feedback on your experience of complying with regulation. It is a priority for BEIS to reduce regulatory burdens and improve the way regulation is delivered, in order to provide a regulatory environment that supports growth whilst maintaining protections.

The interview should take no more than 25 minutes.

We recognise that due to Covid-19 your business may still be under pressure at present, but are you willing to take part in the survey?

INTERVIEWER NOTE: IF AT ANY TIME DURING THE INTERVIEW THE RESPONDENT WISHES TO MAKE FURTHER POINTS, WHICH THEY FEEL HAVE NOT BEEN COVERED IN THE SURVEY, PLEASE TELL THEM THEY CAN EMAIL THEIR COMMENTS AT THE END OF THE SURVEY TO: [businessperceptionssurvey@iffresearch.co.uk](mailto:businessperceptionssurvey@iffresearch.co.uk)

Transferred	1	CONTINUE
Hard appointment	2	MAKE APPOINTMENT
Soft Appointment	3	
Head Office deals with these issues  TELEPHONE _____	18	COLLECT NUMBER AND TRANSFER TO HEAD OFFICE
Refusal	4	CLOSE
Refusal – company policy	5	
Refusal – Taken part in recent survey	6	
Nobody at site able to answer questions	7	
Not available in deadline	8	
Engaged	9	
Fax Line	10	
No reply / Answer phone	11	
Residential Number	12	
Dead line	13	
Company closed	14	
Needs reassurances	15	
Email introductory letter	16	TAKE NAME AND EMAIL ADDRESS



## REASSURANCES TO USE IF NECESSARY

The interview will take around 25 minutes to complete.

Please note that all data will be reported in aggregate form and your answers will not be reported to our client in any way that would allow you to be identified.

If you would like further information on how IFF handles and processes personal data, as well as information on your rights under data protection regulations to access your personal data, withdraw consent, or object to the processing of your personal data you can visit: [www.iffresearch.com/GDPR](http://www.iffresearch.com/GDPR)

If respondent wishes to confirm validity of survey or get more information about aims and objectives, they can call:

- MRS: Market Research Society on 0800 975 9596
- IFF Research: XXXX on XXXX or via email XXXX
- BEIS: XXX

## ASK ALL

S3 Before we begin, I need to read out a quick statement regarding GDPR legislation.

I want to reassure you that all information collected will be treated in the strictest confidence. You have the right to a copy of your data, change your data or withdraw from the research at any point. In order to guarantee this, and as part of our quality control procedures, all interviews are recorded. Is that OK?

Yes – agree to continue	1	
Refuse to continue	2	THANK AND CLOSE

---

READ OUT

Before we begin, I want to confirm a few details about you and your organisation. This information will be used for screening and analysis purposes only – neither you nor your organisation will be identified in the results.

ASK ALL

S4 Would you classify your company as MAINLY...?

READ OUT. SINGLE CODE

A private sector company seeking to make a profit	1	CONTINUE
A charity or voluntary sector organisation or a social enterprise	2	THANK AND CLOSE
A local-government financed body	3	
A central government financed body	4	
DO NOT READ OUT: None of the above	5	

READ TO ALL

S5. Thank you. Throughout this survey we will ask a number of questions about regulation. In your answers, please consider all the regulations applicable to your business. These might include company, environmental and employment laws amongst others, as well as regulations specific to your sector, but would not include laws around taxes.

---

A Classification

ASK ALL

A1 How many people, excluding the owner, are employed by your organisation? Please include anyone who works for the organisation, even if they work in a different location or plant to you.

PROMPT WITH BANDS IF NECESSARY. SINGLE CODE.

INTERVIEWER NOTE: THIS DOES NOT NEED TO BE RESTRICTED TO THE UK

None	1	THANK AND CLOSE
1-4	2	CONTINUE
5-9	3	
10-19	4	
20-49	5	
50-99	6	
100-249	7	
250-499	8	
500-999	9	
1,000+	10	

ASK ALL

A2 I have [SECTOR FROM SAMPLE] as a general description of your company's principal activity. Bearing in mind this is a general description only, does this sound correct?

Yes	1
No	2
Don't know	3

---

IF DISAGREE WITH SAMPLE SECTOR (A2=2/3)

A3 What is the main business activity of your company?

INTERVIEWER PROBE FOR THE FOLLOWING - START WITH FIRST PROBE AND ONLY USE THE OTHERS IF NECESSARY TO GET CLEAR INFORMATION

What is the main product or service of this establishment?

What exactly is made or done at this establishment?

WRITE IN. TO BE CODED TO 4 DIGIT SIC 2007.
--

ASK ALL

A4 Roughly how long has your company been in existence?

PROMPT WITH BAND IF NECESSARY. SINGLE CODE.

Less than a year	1
1-3 years	2
4-5 years	3
6-20 years	4
More than 20 years	5
DO NOT READ OUT: Don't know	6

ASK ALL

A5 In the past 12 months did your business export any products or services outside of the UK?

AS NECESSARY: By this I mean any goods or services sold by you to an individual or organisations based outside of the UK?

MULTI CODE CODES 1&2

Yes – to countries in the European Union	1
Yes – to countries outside of the European Union	2

No (only sell within the UK)	3
Don't know	4

ASK ALL

A6 I am going to read out some statements and I would like you to tell me for each statement whether it applies to your business. So, compared to this time last year have you...?

Please just answer yes or no to each one.

READ OUT. SINGLE CODE PER STATEMENT

	YES	NO	DK
_1 Increased your staff headcount	1	2	3
_2 (IF A5=1-2) Increased the amount you export to other countries	1	2	3
_3 Implemented a new or significantly improved product, process or business model	1	2	3
_4 Started working in new business markets	1	2	3
_5 Increased your sales turnover	1	2	3
_6 Increased your capital investment	1	2	3
_7 (IF A6_1=2): Reduced your staff headcount	1	2	3
_8 (IF A6_5=2): Seen a decrease in your sales turnover	1	2	3

ASK ALL

A7 I am going to read out some challenges which may affect your business. Please indicate which of these, if any, present a challenge to your business:

READ OUT. SINGLE CODE

DS – ROTATE STATEMENTS

		Yes	No	DK
--	--	-----	----	----

_1	Access to finance	1	2	3
_2	Complying with regulation (excluding tax administration)	1	2	3
_3	Administration around tax	1	2	3
_4	Level of tax	1	2	3
_5	Staff recruitment and/or retention	1	2	3
_6	Staff redundancies	1	2	3
_7	Attracting and retaining customers	1	2	3
_8	Regulation preventing or hindering implementation of a new or significantly improved product, process or business model	1	2	3
_9	Coronavirus COVID-19 pandemic	1	2	3
_10	UK exit from the EU	1	2	3
_11	Supply chain issues	1	2	3

A8 DELETED

ask if have any challenge other than tax administration (A7\_1, A7\_2, A7\_4, A7\_5, A7\_6, A7\_7, A7\_8 = 1, A7\_9=1, A7\_10=1, A7\_11=1)

A9 [if a7\_3=1: Excluding tax administration,] which ONE would you say presents the greatest challenge to your business?

READ OUT. SINGLE CODE

DS – ONLY SHOW ROWS SELECTED YES AT A7. ROTATE STATEMENTS

Access to finance	1
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Complying with regulation	2
Level of tax	3
Staff recruitment and/or retention	4
Staff redundancies	5
Attracting and retaining customers	6
Regulation preventing or hindering the implementation of a new or significantly improved product, process or business model	7
Coronavirus COVID-19 pandemic	8
UK exit from the EU	9
Supply chain issues	10
DO NOT READ OUT: Something else (PLEASE SPECIFY)	11

A10 DELETED

A11 DELETED

B Business Perceptions of compliance with and burden of regulation

READ OUT TO ALL

I am now going to focus on your company's approach to regulation. By regulation, I mean all regulation your business has to comply with in order to operate in the UK.

ASK ALL

B1 How important are the following factors in encouraging your business to comply with regulation?

AS NECESSARY: I am going to read out eight, and I want you to tell me how important each one is in encouraging your business to comply with regulation.

PROMPT AFTER EACH CODE IF NECESSARY: How important is this in encouraging your business to comply with regulation?

READ OUT. SINGLE CODE

DS – RANDOMISE STATEMENTS

	Essential	Very important	Fairly important	Not very important	Not at all important	DO NOT READ	DO NOT READ
_1 Maintaining my reputation with customers	1	2	3	4	5	6	7
_2 Giving my business a competitive advantage	1	2	3	4	5	6	7
_3 Delivering social benefits by protecting staff, customers and the environment	1	2	3	4	5	6	7
_4 Avoiding sanctions due to non-compliance	1	2	3	4	5	6	7
_5 Saving my business money	1	2	3	4	5	6	7
_6 Complying with the law	1	2	3	4	5	6	7



_7 Meeting insurance requirements	1	2	3	4	5	6	7
_8 Meeting supply chain requirements	1	2	3	4	5	6	7

ASK ALL

When answering the following questions, I would like you to respond with specific reference to complying with regulation, excluding tax administration.

B2 On average, how many days in total do you or other staff spend per month dealing with all regulation? This does not include any time spent by external contractors.

PROMPT IF NECESSARY. SINGLE CODE

No time at all	1
Less than half a day	2
Half a day to a day	3
1-2 days	4
3-4 days	5
5-10 days	6
11-20 days	7
21-50 days	8
More than 50 days	9
Don't know	10
Refused	11

ASK ALL

B3 We'd now like you to think about whether the cost to your business of complying with regulation has changed. In addition to the staff time you have just described, please also consider any other direct costs such as external contractors, purchasing new equipment or IT systems etc.

So, thinking about the last 12 months, would you say the total cost of complying with regulation has...?

READ OUT. SINGLE CODE

Decreased a lot	1
Decreased a little	2
Stayed the same	3
Increased a little	4
Increased a lot	5
DO NOT READ OUT: Don't know	6

ASK ALL

B4 I will now read out a series of activities your company might undertake and I would like you tell me to what extent you agree or disagree that they are a burden when complying with regulation. By agreeing with a statement, you are indicating that the activity is a burden.

READ OUT. SINGLE CODE

READ OUT AFTER EACH CODE IF NECESSARY: To what extent do you agree or disagree that this is a burden for you?

INTERVIEWER NOTE: REMIND RESPONDENTS THAT AGREE MEANS THE ACTIVITY IS A BURDEN. BY DISAGREEING RESPONDENTS ARE SAYING THE ACTIVITY IS NOT A BURDEN.

INTERVIEWER NOTE: FOR STATEMENT 3 – IF RESPONDENT DOESN'T THINK THIS IS SOMETHING THEY HAVE TO DO, ENCOURAGE TO SAY 'DISAGREE' RATHER THAN N/A

DS – RANDOMISE STATEMENTS

	Strongly Disagree that is a burden	Disagree that it is a burden	Neither Agree nor Disagree	Agree it is a burden	Strongly Agree it is a burden	DO NOT READ OUT: Don't know	DO NOT READ OUT: N/A
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_1 The length of time it takes to go through the whole process of complying	1	2	3	4	5	6	7
_2 Keeping up to date with information about which regulations your business has to comply with	1	2	3	4	5	6	7
_3 Completing paperwork, filling out forms and keeping records on facts and figures	1	2	3	4	5	6	7
_4 Having to provide the same information more than once	1	2	3	4	5	6	7
_5 Being ready for or dealing with inspections	1	2	3	4	5	6	7
_6 Obtaining licenses or permits	1	2	3	4	5	6	7
_7 Understanding the differences in regulation	1	2	3	4	5	6	7

between England, Scotland, Wales and Northern Ireland							
_8 Establishing whether a new product, process or business model are compliant with regulation.	1	2	3	4	5	6	7

C Government's approach to regulation

ASK ALL

I'm now going to ask you some questions about the government's overall policy approach to regulation.

C1 To what extent do you agree or disagree with the following statements about the Government's approach to regulating?

READ OUT. SINGLE CODE

DS – RANDOMISE STATEMENTS

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	DO NOT READ OUT: Don't know	DO NOT READ OUT: N/A
_1 Generally it is clear what the purpose of regulation is	1	2	3	4	5	6	7

_2 It is easy to comply with regulations	1	2	3	4	5	6	7
_3 Most regulation is fair and proportionate	1	2	3	4	5	6	7
_4 The Government understands business, technology and industry well enough to regulate.	1	2	3	4	5	6	7
_5 The Government consults well with business before any new regulation, or change to an existing regulation, is introduced.	1	2	3	4	5	6	7
_6 Government informs businesses of regulatory changes clearly and with sufficient warning	1	2	3	4	5	6	7
_7 Regulators have sufficient resources to adequately enforce non-compliance	1	2	3	4	5	6	7
_8 The Government's approach to regulation facilitates the implementation of new or significantly improved products, processes or business models	1	2	3	4	5	6	7
_9 The Government's approach to regulation facilitates efficient access to international trade opportunities	1	2	3	4	5	6	7
_10 Regulators work in a joined up way and cooperate effectively with one another.	1	2	3	4	5	6	7

---

ASK ALL

C2 To what extent do you agree or disagree that the overall level of regulation in the UK is an obstacle to your business's success? Do you...?

READ OUT.

PROMPT IF NECESSARY: Is that strongly (dis)agree or tend to (dis)agree?

Strongly agree	1
Tend to agree	2
Neither agree nor disagree	3
Tend to disagree	4
Strongly disagree	5
Don't know	6

ASK ALL EXCEPT DK AT C2 (C2=1-5)

C3 Why do you [INSERT RESPONSE OPTION FROM C2] that the overall level of regulation in the UK is an obstacle to your business's success?

WRITE IN		
Don't know	1	

ASK ALL

C4 Thinking about the regulations or regulatory changes you have had to engage with during the Covid-19 pandemic, to what extent did you find them challenging to comply with?

READ OUT. SINGLE CODE

Very challenging	1
Quite challenging	2

Not very challenging	3
Not at all challenging	4
Don't know	5
Refused	6

IF FOUND COVID COMPLIANCE CHALLENGING (C4=1-2)

C5 Why did you find it challenging?

DO NOT READ OUT. MULTI CODE

The regulation/guidance was not sufficiently detailed; it was difficult to understand what actions the business should take	1
The regulation/guidance was too prescriptive; it didn't allow the business to act with sufficient flexibility	2
It was difficult to find out about and keep up to date with changes to the regulation/guidance	3
It created operational problems for the business (including staffing issues)	4
It added considerable financial cost to the business	5
It was excessively time consuming	6
It had a negative impact on my business model (e.g. reduced level of business activity)	7
I found complying with it stressful or challenging	8
Other (please specify)	9
Don't know	10
Refused	11

---

IF DID NOT FIND COVID COMPLIANCE CHALLENGING (C4=3-4)

C6 Why did you not find complying with regulations or regulatory changes during Covid-19 to be challenging?

WRITE IN		
Don't know	1	
Refused	2	

ASK ALL

C7 Now thinking about any regulations or regulatory changes you have had to engage with as a result of the UK leaving the EU, to what extent did you find them challenging to comply with?

READ OUT. SINGLE CODE

Very challenging	1
Quite challenging	2
Not very challenging	3
Not at all challenging	4
Not applicable	5
Don't know	6
Refused	7



---

IF FOUND EU EXIT COMPLIANCE CHALLENGING (C7=1-2)

C8 Why did you find it challenging?

DO NOT READ OUT. MULTI CODE

The regulation/guidance was not sufficiently detailed; it was difficult to understand what actions the business should take	1
The regulation/guidance was too prescriptive; it didn't allow the business to act with sufficient flexibility	2
It was difficult to find out about and keep up to date with changes to the regulation/guidance	3
It created operational problems for the business (including staffing issues)	4
It added considerable financial cost to the business	5
It was excessively time consuming	6
It had a negative impact on my business model (e.g. reduced level of business activity)	7
I found complying with it stressful or challenging	8
Other (please specify)	9
Don't know	10
Refused	11

IF DID NOT FIND EU EXIT COMPLIANCE CHALLENGING (C7=3-4)

C9 Why did you not find complying with regulations or regulatory changes as a result of the UK leaving the EU to be challenging?

WRITE IN

Don't know	1	
Refused	2	

D Regulators

ASK ALL

Moving on from discussing the burden of regulation more generally, I'm now going to ask you some questions about the way regulators behave, for example the way they act towards you or the information they provide to you. We want you to think about both local and national regulators when answering these questions.

D1 DELETED

D1A DELETED

D1B DELETED

ASK ALL

D2 Thinking about the regulators you've dealt with in the past 12 months, I'd like you to tell me to what extent you agree or disagree with each of the following statements.

READ OUT. SINGLE CODE

INTERVIEWER NOTE: IF RESPONDENT HAS NO EXPERIENCE OF THE MATTER, CODE AS N/A

DS – RANDOMISE STATEMENTS

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	DO NOT READ OUT: Don't	DO NOT READ OUT: N/A
--	-------------------	----------	----------------------------	-------	----------------	------------------------	----------------------

_1 Regulators provide advice and guidance that helps my business to comply	1	2	3	4	5	6	7
_2 Guidance published by regulators is easy to locate	1	2	3	4	5	6	7
_3 The process to appeal against a decision made by regulators is easy and transparent	1	2	3	4	5	6	7
_6 I have confidence that I can rely on the advice and guidance regulators provide	1	2	3	4	5	6	7
_7 Regulators are easily accessible	1	2	3	4	5	6	7
_8 Regulators provide timely responses	1	2	3	4	5	6	7
_9 Regulators understand my business well enough to provide advice that is tailored to my circumstances	1	2	3	4	5	6	7
_10 Regulators cooperate effectively with one another	1	2	3	4	5	6	7
_11 Regulators actively support the introduction of new or significantly improved products, processes or business models	1	2	3	4	5	6	7

---

ASK ALL

D3a Could you tell me the regulator with which your company has had the most contact in the last 12 months?

ADD IF NECESSARY: A regulator is a body or organisation appointed by government that supervises a particular industry or business activity. This could be a government body or organisation that enforces laws among all UK businesses or a regulator specific to your industry.

DO NOT READ OUT. SINGLE CODE

Commission for Equality and Human Rights (EHRC)	1
Driver and Vehicle Standards Agency	2
Environmental Health (Local)	3
Environment Agency (National)	4
Financial Conduct Authority (FCA)	
Fire Safety (Local)	5
Fire and Rescue Authorities in England (National)	6
Food Safety Officers from my Local Council (Local)	7
Food Standards Agency (National)	8
Health and Safety Officers from my Local Council (Local)	9
Health and Safety Executive (National)	10
Her Majesty's Revenue and Customs (HMRC)	11
Information Commissioner	12
Police	13
Solicitors Regulation Authority (SRA)	
The Pensions Regulator (TPR)	14
Trading Standards	15

Vehicle Certification Agency	16
Office for Product Safety and Standards (OPSS)	17
Other 1 (Please specify)	18
Don't know	19
None	20

ASK IF OPSS RELEVANT SIC CODE FROM SAMPLE

D3 Your business has a classification which may mean it is regulated by the Office for Product Safety and Standards (OPSS). In the last 12 months have you:

READ OUT. SINGLE CODE

Received or obtained advice or guidance from OPSS	1
Interacted with OPSS but not received advice or guidance	2
Had no interaction with OPSS	3
DO NOT READ OUT: Have never heard of OPSS	4
DO NOT READ OUT: Don't know	5

ASK IF ANY INTERACTION WITH OPSS (D3=1,2)

D4 Thinking about the dealings you have had with OPSS in the past 12 months, I'd like you to tell me to what extent you agree or disagree with each of the following statements.

READ OUT. SINGLE CODE

INTERVIEWER NOTE: IF RESPONDENT HAS NO EXPERIENCE OF THE MATTER, CODE AS N/A

DS – RANDOMISE STATEMENTS

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	DO NOT READ OUT: Don't know	DO NOT READ OUT: N/A
_1 OPSS provides advice and guidance that helps my business to comply	1	2	3	4	5	6	7
_2 Guidance published by OPSS is easy to locate	1	2	3	4	5	6	7
_6 I have confidence that I can rely on the advice and guidance OPSS provides	1	2	3	4	5	6	7
_7 OPSS is easy to contact	1	2	3	4	5	6	7
_8 OPSS provides timely responses	1	2	3	4	5	6	7
_9 OPSS understands my business well enough to provide advice that is tailored to my circumstances	1	2	3	4	5	6	7
_10 OPSS cooperates effectively with other regulators	1	2	3	4	5	6	7

_11 OPSS actively supports the introduction of new or significantly improved products, processes or business models	1	2	3	4	5	6	7
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E Communications

READ OUT IF OPSS RELEVANT SIC CODE FROM SAMPLE

I'm now going to move on to think about regulation more widely and not just the individual regulator we have been discussing.

ASK ALL

E1 Which, if any, of the following do you use to help the business in complying with regulation?

READ OUT. MULTI CODE

Inspectors or Regulatory Officers	1
Any official Government or Regulator websites	2
Any external business advisers or consultants (e.g. accountants, lawyers, specialist consultants, etc.)	3
Any Trade Associations / Business Organisations	4
Friends, family and other personal contacts (including business peers)	5
Other (PLEASE SPECIFY)	6
DO NOT READ OUT: None of these	7
DO NOT READ OUT: Don't know	8

E2 DELETED

E3 DELETED

---

IF USES EXTERNAL BUSINESS AGENT (E1=3)

E4 And, in the last year, approximately how much have you spent using external business advisers or consultants to help with complying with regulations?

PROMPT IF NECESSARY. SINGLE CODE.

Nothing	1
Under £500	2
£500 - £999	3
£1,000 - £4,999	4
£5,000 - £9,999	5
£10,000 - £19,999	6
£20,000 - £49,999	7
£50,000 or more	8
Don't know	9
Prefer not to say	10

IF USES EXTERNAL BUSINESS AGENT (E1=3)

E5 Why does your business use external business advisers or consultants to help with complying with regulations? Is it because...?

READ OUT. MULTI CODE

You lack time or internal resource	1
The advice from regulators is insufficient	2
There is a lack of clarity about the legal requirements	3
You want assurance (i.e. that you are compliant)	4
You want independent advice	5



You are worried about penalties for non-compliance	6
They have more knowledge or are more specialist	7
Any other reason (Please specify)	8
DO NOT READ OUT: Don't know	9

E6 DELETED

F Future burden of regulation

ASK ALL

F1 In the next 12 months, do you think that the burdens resulting from regulation will decrease, stay the same, or increase?

READ OUT. SINGLE CODE

Decrease a lot	1
Decrease a little	2
Stay the same	3
Increase a little	4
Increase a lot	5
Don't know	6

F2 DELETED

F3 DELETED

F4 DELETED

---

G Closing questions

G1-G9 COGNITIVE QUESTIONS DELETED

ASK ALL

Nearly done, thank you very much for your time. I just need to check a couple of things before you go.

G10 Occasionally it is necessary to call people back to clarify information; may we please call you back if required?

REASSURE IF NECESSARY: Your details will only be used by IFF to call you back regarding this particular study.

Yes	1
No	2

ASK ALL

G11 If BEIS and their partners in this survey wish to carry out follow-up research within the next 2 years on related issues or any would it be ok for them or their appointed contractors to contact you?

Yes	1
No	2

IF CONSENT TO RECONTACT (G11=1)

G12 And is <TELEPHONE NUMBER> the best number to call you on?

Yes	1
No - write in number	2

---

ASK ALL

G13 And finally, please could I take a note of your name?

Yes (WRITE IN)	1
Refused	2

THANK AND CLOSE

I declare that this survey has been carried out under IFF instructions and within the rules of the MRS Code of Conduct.
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