

## HMRC 2014/15 Central External Research Programme - managed by Customer Insight & Knowledge Team in Central Customer & Strategy Directorate

Project Title	Brief Description
Evaluation of Evasion Publicity Campaign 2014-15	Evasion Publicity is a three year (2012-15) advertising campaign. This research is for the third year of the evaluation measuring both campaign impact and longer-term change. The evaluation approach is a combination of tracking survey research, before and after campaign bursts, and analysis of administrative data.
Evaluation of the national rollout of the NES programme	<p>Following a successful pilot, a new approach to delivering services for NES customers is being implemented nationally, from 31 May 2014. The performance of this new service will be closely monitored and its evaluation will help us to ensure that the new service model is delivering the most cost efficient service by:</p> <ul style="list-style-type: none"> <li>• Enabling us to assess whether the service is correctly reaching NES customers.</li> <li>• Allowing us to check that previous Enquiry Centre users are aware of alternative channels and how to access support.</li> <li>• Permitting us to gauge levels of customer and staff satisfaction and implementing any necessary changes.</li> </ul>
HMRC Digital Services Accessibility Testing of services	To ensure that the new digital services we are building meet the necessary industry accessibility standards, we propose to carry out research and testing with users who have specific disabilities, particularly those who use assisted technologies to access digital services. This will check whether our services work with the different assisted technologies, and whether the way the information is experienced affects comprehension for users with a range of disabilities so that customers accessing our digital services in this way receive the same exceptional customer experience as other customers.
HMRC Digital Services Assisted Digital customer support model	To ensure all customers are well supported a new Assisted Digital support model is being implemented for individuals who will need additional help. The proposed research will:-Develop and test customer support features for Assisted Digital customers to understand what they need when using our online services and forms; Understand how best to triage customers and provide them with the right level of support, identifying what tool works best with different customers; Evaluate the assisted digital service.
HMRC Digital Services Assisted Digital survey	This proposed research will help us understand the size and demographics of the digitally excluded and assisted digital population to inform how we will provide support for those customers who cannot use these services to transact with us without assistance. This enables us to deliver customer-focused digital services that are straightforward and convenient to use.
HMRC Digital Services Concept testing and exploratory research	Concept testing and exploratory research is a key stage in the design of HMRC's Digital services. It allows us to ensure that the right solution is taken forward for user testing. The proposed research involves testing a range of different concepts for a particular digital service with small groups of customers prior to user testing and/or conducting exploratory research to understand the attitudes and behaviours towards those concepts.
HMRC Digital Services Digital communications	As HMRC develops its externally facing Digital Strategy and brings services online, the overarching communications strategy for Digital will be crucial in driving customer take up of digital services. The communications strategy will be both dependent on and require customer research to target specific customers and test and develop messages with customers. The proposed research aims to ensure that communications reach customers who cannot currently access digital services.

HMRC Digital Services User testing	This proposed research involves recruiting a diverse range of customers from across the UK to test each of the digital services delivered in 14/15. User testing is a vital part of how we are designing and building HMRC's new digital services. It allows us to continually test iterations of our digital services with relevant customers to help us to continually refine and improve what we build; making sure that it meets the needs of customers and is easy to use.
HMRC Stakeholder Engagement Survey	The research allows us to better understand the drivers behind HMRC's reputation with its stakeholders (including politicians, businesses and journalists). It will enable us to: gauge stakeholders' perceptions of HMRC, explore the rationales behind these perceptions, understand stakeholders' issues, behaviours and attitudes thereby helping to better inform future engagement work, transform stakeholders into advocates of HMRC through closer engagement.
Net Pay Arrangements for Flat Rate Expenses (FRE)	<p>Flat Rate Expenses (FRE) are deductions given to individuals to cover certain work expenses.</p> <p>The Office of Tax Simplification (OTS) has recommended that the Flat Rate Expenses (FRE) be reviewed and updated; and employers allowed to include employees' claims through the payroll should they wish to. This would remove HMRC processing of FRE and customers from having to claim.</p> <p>The proposed research would test the OTS proposal with a larger group of employers to understand barriers/incentives of adopting this approach and identify refinements needed to support potentially growing net payroll arrangements amongst employers.</p>
Online Inheritance Tax: Concept development and testing	The Inheritance Tax (IHT) service will be made available online so we need to develop and deliver the online capability for IHT products and processes. Moving the service online provides us with an opportunity to simplify the current process for the customer. This proposed research will ensure the best concept is developed before we start to build the online service so that fewer iterations of the service require user testing.
Scottish Rate of Income Tax (SRIT)	The Scottish Rate of Income Tax (SRIT) will be implemented in April 2016. The proposed research will test awareness of the changes; establish customers need for information about SRIT and the most appropriate channels; test key messages around residency and the need to report changes of address to HMRC; ensure that customers understand the notification explaining Scottish taxpayer status; and assess the demand for online tools. Research will be planned to avoid purdah periods around the referendum.
Self Assessment Campaign Tracking	Regular annual tracker to evaluate the Self-Assessment advertising campaign and its effectiveness of reminding customers to do their returns by 31 Jan. This is reported to the Cabinet Office Efficiency Reform Group and Corporate Communications.
SME Ed Track	<p>This ongoing tracking research measures the customer satisfaction of SME customers that engage with HMRC business support products by completion of an online quantitative survey.</p> <p>The aim of the research is to:</p> <ul style="list-style-type: none"> <li>• provide HMRC with an understanding of the relative value and success of the current education offering</li> <li>• gain insight into how HMRC can improve the value these products/services deliver to HMRC and customers</li> <li>• provide an understanding of how we can improve the customer satisfaction of these products/services.</li> </ul>

Tax Credits Renewal Campaign 2014	In 2014, approximately 2.3m people are required to renew their tax credits so they can continue to receive their entitlement and HMRC can reconcile payments. If they do not renew, HMRC spends a significant sum getting people back into payment. HMRC runs an advertising campaign each year to remind people to renew their claim before the 31 July deadline. This research will track awareness and key message take-out on the tax credits renewals campaign.
The new State Pension (nSP)	<p>In April 2016 the new State Pension will replace the current two-tier system of basic and additional State Pension. The reforms, delivered jointly by DWP and HMRC, will significantly simplify the current system. They will allow people to more easily understand the State Pension component of their retirement income and be more certain of the importance of planning and saving for their retirement.</p> <p>As part of this employers are now required to submit any employee Scheme Contracted Out Numbers (SCONs) on their Full Payment Submissions (FPS). This research will evaluate previous communications to employers around SCON submission and test the effectiveness of future messages.</p>
Transferable Tax Allowance for Married Couples and Civil Partners	To support successful implementation of Transferable Tax Allowance for Married Couples and Civil Partners, it is important for HMRC to gain insight into how customers understand this policy and are likely to behave. The research findings will enable us to develop an easy to use claims process, provide helpful communications, and support materials which meet customer needs.
Web content testing for Annual Tax Summaries	This research will allow HMRC to gain insight into how customers navigate the web structure to find relevant online information when seeking more information about their Annual Tax Summary. The research will: explore whether customers want to and are able to access help & how they navigate the web content, identify whether web content meets customers information needs, and gather insight into customer behaviour after reading the web content.