

HMRC 2011/12 External Research Programme – managed by Behavioural Evidence & Insight Team in Central Customer & Strategy Directorate

Project Title	Description
Personal Tax Customer & Strategy	
Affluent customers	Research into the drivers of behaviour for affluent customers, to help HMRC engage effectively with them.
Algorithm Development – (Mass Personalisation programme)	Commissioning an agency to undertake research and analysis to explore the potential for predicting attitudinal segments of HMRC individual customers using only widely available demographic/other data and deliver a set of algorithms by which we can assign each individual customer to a predicted segment.
Communications Lab	Customer testing of HMRC products/letters/forms etc.
Encouraging SA filing	Small scale qualitative research with customers to ascertain customer views on approaches to improving SA filing practices.
Exploration / Always Needs Help	A multi-stage project that aims to inform the design of a future service for all HMRC 'Always Needs Help' customers that will meet their enhanced support needs. Stage 1 of the research is exploratory and aims to define the 'Always Needs Help' population by identifying the range of customers to be included (across all segments), size the population, identify the reasons driving the need for help, highlight the forms of support used and ascertain any enhanced support that may be required.
Real Time Information (RTI) Employers	Research to help HMRC plan and deliver RTI. This first wave of research will explore and quantify the customer awareness of; attitudes to; and migration to RTI.
SA Pilot Customer Evaluation (Mass personalisation programme)	Primary research with customers to ascertain customer reactions to receiving letters mass personalisation letters designed to influence their tax filing behaviour, with optional extra project.
SA Pilot Message Testing (Mass personalisation programme)	Qualitative research to test customer reactions to prototype mass personalisation letters that are being designed to try to influence traditional late tax filers to file on-time and avoid penalties.
Business Customer & Strategy	
Education Lab	Evaluation of the different education channels and their tools to determine relative effectiveness and impact on customer behaviour.
Office for Tax Simplification Research	Qualitative and quantitative research to support the Office for Tax simplification's review of small business taxation.
One Click - Phase 2 Usability Testing	Qualitative usability testing to refine the RegWiz, Tax Dashboard and VAT Registration Transformation products with SMEs
One Click - Phase 3 Communication Messages Research	Qualitative research to help develop targeted communication messages to ensure that customers are aware of the 3 products (RegWiz, Tax Dashboard and VAT Registration Transformation) what they will deliver and how to access them.

Project Title	Description
SME customer education tracking	Monthly or quarterly on-line survey – will focus on education products using on-line with email addresses collected at training/education events
SME Segment prediction	Attempt to discover the most beneficial locations for our SME face-to-face offering. Quantitative and data analysis, plus Experian input
VAT Tranche 2 Awareness tracking	Ongoing survey to track customer awareness of the forthcoming government mandation to file on-line (for tranche 2 customers)
Communication and Marketing	
SA Penalty Awareness Tracking (option for 2 waves)	Tracking awareness of the new penalties amongst the SA audience
Tax for Business SA Tracking (2 waves)	Evaluation of the SA campaign – pre and post waves (Sept 2011 & Feb 2012)
Tax Credits Renewals Tracking (2 waves – 22 & 23)	Evaluation of the Tax Credits Renewals campaign (post wave August 2011, pre wave March/April 2012)