



National Audit Office

# Complying with Regulation: Business Perceptions Survey 2009

## Appendices Two and Three

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# Contents

Appendix Two  
Scope and Methodology **1**

Appendix Three  
Survey results **7**

# Appendix Two

## Scope and methodology

The real test of the Administrative Burdens Reduction Programme (the Programme) is the extent to which it delivers meaningful improvements for business. To evaluate the success of the Programme we are tracking perceptions of regulatory burdens by conducting an annual survey of businesses – the Business Perceptions of Regulation survey. The survey measures the impact of government initiatives to make complying with regulations less burdensome for business. The main objective of this report is to present the results and analysis of our 2009 survey and then in addition to present an update of the Government's claimed savings and an outline of how the BRE are planning to take the agenda forward.

- 1** The findings and conclusions presented in this year's report are based on:
  - the results from the National Audit Office 'Business Perceptions of Regulation' survey;
  - qualitative in-depth interviews with businesses;
  - review of department and BRE documentation; and
  - consultation with an Advisory Network of business organisations.

### **Business Perceptions of Regulation survey**

To determine whether the Programme is achieving real impacts for businesses over time, we have designed a survey to identify businesses perceptions of regulation and the administrative burdens imposed on them by regulation. The survey is being carried out annually and is intended to track if, and how, businesses experience of regulation changes as a result of government initiatives to reduce the cost to business of complying with regulation.

We had three specific objectives for the survey in the current year:

- a** to continue to track business perceptions;
- b** to understand the factors and drivers behind perceptions of regulation; and
- c** to examine in detail the impact of specific initiatives.

Our questionnaire was therefore designed to reflect these core objectives. The majority of questions from last year's survey were retained in order to track perceptions but also included were additional questions to address our second objective. To question business on the impact of specific initiatives (objective 3), we added a further section to our questionnaire labelled the 'booster survey'. This additional section focused on the impact of four simplification initiatives introduced by the employment law guidance team in the Department for Business, Innovation and Skills (BIS). Five hundred businesses that completed the core questionnaire on employment law went on to answer the additional questions in the booster survey.

Our questionnaire was structured as follows:

- businesses' general perceptions of regulation;
- those aspects of complying with regulation that businesses find burdensome;
- information sources used by business to help comply with regulation;
- perceptions on changes to regulation; and
- the 'booster survey' on employment law guidance simplification initiatives (answered by employment law respondents only).

### Main stage

The main stage of the survey was carried out between February and March 2009. A sample of named senior manager contacts was obtained by FDS International from its approved sampling provider. All contacts were sent an advance letter prior to fieldwork, providing further information about the research and an opportunity to supply an alternative contact name or number if required or to remove the company from the sample. Following the advance letter, 9,868 contacts were issued to the FDS International Telephone Centre, giving a ratio of 5:1 to achieve 2,037 interviews with businesses.

### Sample

The sample size of 2,037 matched last year's sample size. Results are statistically significant to within +/- three percentage points at the 95 per cent confidence level. As in 2007 and 2008, quotas were set by the industry sector and size of business to account for variations in response rate between different types of business.

**Figure 16** shows that sample profile for 2009, 2008 and 2007, i.e. the number and percentage of interviews achieved in all three years in each of the sub-groups.

**Figure 16**  
Sample profile

	<b>Number 2009</b>	<b>Number 2008</b>	<b>Number 2007</b>
Total	2,037	2,000	2,000
<b>Area of Law</b>			
Employment Law	500	409	411
Tax Law	412	433	405
Health and Safety Law	425	641	480
Company Law	359	306	377
Planning Law	341	211	327
<b>Sector</b>			
Agriculture	185	127	122
Construction	182	130	159
Finance	100	102	101
Hotel/catering	134	94	111
Manufacturing	162	124	130
Property/business	495	394	402
Retail/distribution	359	329	321
Transport	136	111	112
Public administration/other	304	589	542
<b>Business size</b>			
Small (1-49 employees)	1,750	1,514	1,470
Medium (50-249 employees)	150	232	291
Large (250+ employees)	129	246	232
<b>Length of time business has been in existence</b>			
Less than a year	54	56	25
1-3 years	256	90	123
4-5 years	177	60	159
6-20 years	803	637	813
More than 20 years	747	1157	872

Source: FDS International

### Response rate

**Figure 17** shows the unadjusted response rate for the telephone fieldwork. We have also included the 2008 and 2007 response rate for comparison.

Data have been weighted by company size and sector due to the stratification of the sample. Weights were applied to reflect the profile of British-based companies. Where percentages in the charts or tables in the report do not always add up to 100 per cent, it is due to multiple answers, computer rounding and/or the exclusion of neutral, don't know or not stated responses. In addition, where percentages in the charts vary by one percentage point from those in the text, this too is simply due to computer rounding.

**Figure 17**  
Response rate

<b>Main stage</b>	<b>2009</b>	<b>2008</b>	<b>2007</b>
Total sample	9,868	9,813	8,325
Total sample used	9,729	8,320	7,769
Achieved interviews	2,037	2,000	2,000
<b>Unadjusted response rate</b>	<b>21%</b>	<b>24%</b>	<b>26%</b>
<b>Adjusted response rate</b>	<b>27%</b>	<b>30%</b>	<b>34%</b>
<b>Eligible sample</b>			
Achieved interviews	2,037	2,000	2,000
Respondent refusal	2,556	2,580	1,637
Other refusal	963	763	530
No response	1,554	1,000	1,626
Not available during fieldwork	263	177	n/a
Interview terminated	103	154	127
<b>Total eligible sample</b>	<b>7,476</b>	<b>6,674</b>	<b>5,920</b>
<b>Ineligible sample</b>			
Incorrect telephone number	1,729	1,166	992
Business moved/no longer in business	306	228	304
Unable to respond on area of law	147	194	517
Other	71	58	36
<b>Total ineligible sample</b>	<b>2,253</b>	<b>1,646</b>	<b>1,849</b>
Not needed – fieldwork end / target achieved	139	1,493	556

Source: FDS International

### **Qualitative in-depth interviews with business**

To explore the impact of Government initiatives in more depth and to gauge real experiences of business when complying with regulation we conducted 50 in-depth interviews. The interviews were conducted in two phases:

- thirty interviews were conducted prior to the survey and further informed the development of the quantitative survey; and
- twenty interviews were carried out after the survey to provide further analysis of particular areas of interest from the survey results.

A sample of named senior manager contacts was obtained by FDS International from their approved sampling supplier. The interviews were conducted either face-to-face or by telephone depending on the preference of the respondent. Businesses of differing size and across a range of industry sectors were interviewed (**Figure 18** overleaf). Each in-depth interview was guided by a researcher using a discussion guide and lasted approximately 40 minutes. Phase one of the interviews was conducted between January and February 2009, and phase two was carried out between May and June 2009.

### **Review of documentation associated with the delivery of the Programme**

We reviewed and presented the evidence from key documentation relating to the delivery of the Programme. This documentation included:

- the BRE 'Making your Life Simpler: Simplification Plans, a summary' published in December 2008;
- the HM Revenue and Customs 'Delivering a new Relationship with Business: Reducing burdens and supporting business' published in April 2009; and
- BRE documentation on the terms and reference and results of the External Validation Panel.

Details on the 240 initiatives that have been introduced since the start of the Programme can be found published in departmental simplification plans. These are available on relevant department websites.

### **Advisory Network of Business Organisations**

Our advisory network of business organisations works as a sounding board for testing our approach to examining the outcomes of the Administrative Burdens Reduction Programme. It also advises us on the wider business community's view of government initiatives to reduce administrative burdens and on what really matters to business in terms of a better and more 'business friendly' regulatory environment. We have consulted the Advisory Network members individually and also conducted a discussion session. This session was used for in-depth analysis of emerging results from the Business' Perceptions of Regulation survey. The Advisory Network members are:

- The Association of Chartered Certified Accountants (ACCA)
- The Confederation of British Industry (CBI)
- The Institute of Directors (IoD)
- British Chambers of Commerce (BCC)
- Federation of Small Businesses (FSB)
- Federation of Private Businesses (FPB)

In addition this year, we met individually with members that had sat on the BRE's External Validation Panel.

**Figure 18**  
Quality in-depth interviews composition

	Pre Survey	Post Survey
<b>Size of company (number of employees)</b>		
Small (1-49 employees)	14	10
Medium (50-249 employees)	5	7
Large (250+ employees)	11	3
<b>Area of Law</b>		
Employment Law	12	8
Health and Safety	13	2
Company Law	5	3
Planning	0	4
Tax	0	3
<b>Sector</b>		
Finance	3	2
Manufacturing	6	3
Property/Business services	6	4
Public administration	6	1
Retail/Distribution	5	4
Construction	2	5
Hotels and catering	1	0
Transport	1	1

Source: FDS International



# Appendix Three

## Survey results

This appendix provides the results of the National Audit Office/FDS International 2009 business perception survey. It shows the topline results and is based on 2,037 interviews conducted by telephone across businesses in Great Britain. The 2008 and 2007 survey results are included for comparison.

Fieldwork was conducted between 27 February and 30 March 2009, and further details on the methodology used for the survey can be found in Appendix Two of this report. The following points will assist the reader in interpreting the results presented in this appendix.

- An asterisk (\*) denotes a finding of less than 0.5 per cent but greater than zero.
- Where figures do not add up to 100 per cent this is due to computer rounding, the exclusion of don't know or refused categories or multiple responses.
- Where bases are less than 30, unweighted numbers (N) are given rather than percentages.
- Data are based on all respondents unless stated otherwise.
- Respondents' answers are based on their understanding of the issues as they are presented in the questionnaire. No extra stimulus materials were used in obtaining these answers.
- Respondents were asked to respond with specific reference to one of five areas of regulation – planning, tax, health & safety, employment or company law.
- A booster questionnaire section was asked of all those responding on employment law.

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### Standard Industrial Classification

	2009 (%)	2008 (%)	2007 (%)
Agriculture	6	4	4
Construction	10	9	9
Finance	2	2	2
Hotel/Catering	7	6	6
Manufacturing	6	7	7
Property/Business	29	21	21
Public Administration/other	17	30	30
Retail/Distribution	19	17	17
Transport	4	4	4

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**Q1** As far as you know, roughly how many staff are employed by the organisation you work for, excluding owners, partners and directors? Please include anyone who works for the organisation, even if they work in a different location or plant to you.

	2009 (%)	2008 (%)	2007 (%)
None	31	n/a	n/a
1-4	36	51	50
5-9	12	22	21
10-19	9	11	13
20-49	7	11	11
50-99	2	1	2
100-249	1	2	1
250-499	*	1	1
500+	*	*	*
1,000+	*	*	*
Don't know	*	*	*

**Q2** Thinking about the next 12 months, does your business expect to take on staff, reduce staff or stay the same?

	2009 (%)	2008 (%)	2007 (%)
Take on staff	16	n/a	n/a
Stay the same	73	n/a	n/a
Reduce staff	9	n/a	n/a
Don't know	2	n/a	n/a

**Q3** Roughly how long has your company been in existence?

	2009 (%)	2008 (%)	2007 (%)
Less than a year	3	4	2
1-3 years	14	6	7
4-5 years	10	4	10
6-20 years	41	37	44
More than 20 years	32	50	37

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**Q4 Does your business have a formal written business plan? IF YES: How long ago was this plan written or last revised?**

	<b>2009 (%)</b>	<b>2008 (%)</b>	<b>2007 (%)</b>
<b>Yes</b>	35	n/a	n/a
Revised within the last two years	22	n/a	n/a
Revised 2-5 years ago	7	n/a	n/a
Revised over 5 years ago	4	n/a	n/a
Do not know when written / revised	1	n/a	n/a
<b>No</b>	64	n/a	n/a
Don't know	1	n/a	n/a

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**Q5 Of the following six factors which may affect your business, which would you say currently presents the greatest challenge?**

	<b>2009 (%)</b>	<b>2008 (%)</b>	<b>2007 (%)</b>
Attracting and retaining customers	42	n/a	n/a
Complying with regulation	19	n/a	n/a
Level of tax	16	n/a	n/a
Access to finance	13	n/a	n/a
Staff recruitment and retention	5	n/a	n/a
Staff redundancies	1	n/a	n/a
Don't know	4	n/a	n/a

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## Section 1 – Business Perceptions of the Burden of Regulation

**Q6** How often does your job involve tasks associated with complying with Planning/Tax/Health and Safety/Employment/Company Law regulation?

	2009 (%)	2008 (%)	2007 (%)
Daily	27	32	n/a
Weekly	15	13	n/a
Monthly	14	12	n/a
Quarterly	8	10	n/a
Yearly	12	12	n/a
Less often	21	16	n/a
Don't know	3	5	n/a

**Q7** How many staff, if any, does your business specifically employ to deal with complying with Planning/Tax/Health and Safety/Employment/Company Law regulation?

	2009 (%)	2008 (%)	2007 (%)
None	48	n/a	n/a
1	15	n/a	n/a
2-4	4	n/a	n/a
5-9	1	n/a	n/a
10+	*	n/a	n/a
Don't know	*	n/a	n/a
No other staff	31	n/a	n/a

**Q8 Do you agree or disagree with the following statements about the Government's approach to regulating in this area?**

	%	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know or n/a
Generally, it is clear what the purpose of regulation is	2009	11	43	9	19	16	2
	2008	13	44	6	20	14	3
	2007	12	43	7	20	15	3
It is straightforward to understand what you are required to do to comply with regulations	2009	11	33	7	25	22	1
	2008	12	33	6	25	22	2
	2007	9	28	7	28	25	3
It is easy to comply with regulations	2009	9	29	9	30	22	1
	2008	8	30	7	28	25	2
	2007	6	27	10	29	26	2
Most regulation is fair and proportionate	2009	7	38	11	23	19	2
	2008	7	39	10	23	19	3
	2007	5	34	10	25	21	4
The Government understands business well enough to regulate	2009	4	22	9	26	38	2
	2008	4	23	8	25	38	2
	2007	3	18	8	29	39	3
The Government consults well with business before any new regulation, or change to an existing regulation, is introduced	2009	4	16	11	28	36	6
	2008	4	17	6	25	39	9
	2007	3	13	8	29	39	7
Different parts of government take a joined-up approach to regulation	2009	5	23	16	23	22	12
	2008	5	24	11	23	22	15
	2007	5	20	13	22	24	15

**Q9** Do you agree or disagree that the overall level of regulation in the UK is an obstacle to your business's success? Is that strongly (dis)agree or tend to (dis)agree?

	2009 (%)	2008 (%)	2007 (%)
Strongly agree	35	31	32
Tend to agree	27	27	26
Neither agree nor disagree	8	8	9
Tend to disagree	24	24	24
Strongly disagree	6	8	6
Don't know	1	2	2

**Q10a** Why do you agree that the overall level of regulation in the UK is an obstacle to your business's success? Base: All agreeing that regulation is an obstacle (1,270) in Q9

**Top ten responses:**

	2009 (%)	2008 (%)	2007 (%)
Over-regulated	30	n/a	n/a
Time consuming	21	n/a	n/a
Difficult to comply with	17	n/a	n/a
Financial burden	14	n/a	n/a
Paperwork/bureaucracy	13	n/a	n/a
Regulations constantly changing	11	n/a	n/a
Size of business	10	n/a	n/a
Lack of flexibility/limits to what can be done	8	n/a	n/a
Pointless/waste of time	7	n/a	n/a
Regulation difficult to understand	7	n/a	n/a

**Q10b** Why do you disagree that the overall level of regulation in the UK is an obstacle to your business's success? Base: All disagreeing that regulation is an obstacle (606) in Q9

**Top ten responses:**

	2009 (%)	2008 (%)	2007 (%)
Just something you have to do	30	n/a	n/a
Not a priority for the business	17	n/a	n/a
Responsibilities are clear	15	n/a	n/a
Used to dealing with regulations	12	n/a	n/a
Other	10	n/a	n/a
Does not affect me/my business	8	n/a	n/a
Other pressing priorities	5	n/a	n/a
Don't know	4	n/a	n/a
Use an external agent	3	n/a	n/a
Have dedicated staff to deal with it	2	n/a	n/a

**Q11a** Government has to weigh-up the cost to business of complying with rules and regulations, against protecting people and the environment from harm. Overall, do you think that the Government has got the balance about right?

	2009 (%)	2008 (%)	2007 (%)
Yes	42	n/a	n/a
No	50	n/a	n/a
Don't know	8	n/a	n/a

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**Q11b** So do you think....? Base: All saying balance not right (1,041)

	2009 (%)	2008 (%)	2007 (%)
...there is too much regulation	91	n/a	n/a
...there is too little regulation	5	n/a	n/a
Don't know	4	n/a	n/a

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## Section 2 – Identifying which aspects of regulation businesses find burdensome

**Q12** Still responding with specific reference to complying with Planning/Tax/Health and Safety/Employment/Company Law regulation...do you agree or disagree that the following activities are a burden when complying with regulation?

	%	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know or n/a
The length of time it takes to go through the whole process of complying	2009	33	36	7	18	4	3
	2008	37	35	7	15	4	3
	2007	42	36	7	10	3	3
Finding information about which regulations apply to your business	2009	32	34	6	21	5	1
	2008	32	36	7	18	4	2
	2007	40	34	7	14	3	2
Finding guidance and advice explaining what you have to do to comply with given regulations	2009	28	36	6	22	5	2
	2008	27	39	6	21	5	2
	2007	34	37	7	16	4	3
Preparing and reporting facts and figures for government	2009	26	31	11	21	6	6
	2008	29	32	9	18	6	6
	2007	33	34	10	15	4	4
Completing paperwork, including filling out forms and keeping records	2009	31	34	7	21	5	2
	2008	37	33	6	17	6	2
	2007	39	35	7	14	4	2
Having to provide the same information more than once to Government	2009	37	27	8	18	5	5
	2008	37	28	8	17	6	4
	2007	44	27	8	13	5	3
Being ready for and complying with inspections	2009	19	30	12	26	7	6
	2008	23	34	11	22	6	4
	2007	25	36	11	20	4	5
Having to keep up to date with changes in existing regulation	2009	30	39	6	18	5	2
	2008	37	39	5	14	4	1
	2007	41	39	5	11	3	2
Having to keep up to date with the introduction of new regulations	2009	32	40	6	16	5	3
	2008	n/a	n/a	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a	n/a	n/a
Updating policy/policies for your business when regulations change or are introduced	2009	26	37	8	22	4	3
	2008	n/a	n/a	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a	n/a	n/a



### Section 3 – Information sources used by business to help them comply

**Q13** How informed do you feel about Planning/Tax/Health and Safety/Employment/Company Law regulations which affect your business?

	2009 (%)	2008 (%)	2007 (%)
Very informed	10	n/a	n/a
Fairly informed	51	n/a	n/a
Not very informed	26	n/a	n/a
Not at all informed	12	n/a	n/a
Don't know	1	n/a	n/a

**Q14** Which, if any, of the following do you use to help the business in complying with Planning/Tax/Health and Safety/Employment/Company Law regulations?

	2009 (%)	2008 (%)	2007 (%)
External accountant	55	n/a	n/a
Trade Association(s)/Business Organisation(s)	46	52	n/a
Government departments' websites	43	40	n/a
External insurance company	37	n/a	n/a
The Businesslink website	33	29	n/a
External lawyer	27	n/a	n/a
Direct contact with staff in Government departments	26	29	n/a
External specialist consultant	23	n/a	n/a
Nothing in particular	*	n/a	n/a
Other	3	11	n/a
None of these/Don't know	7	10	n/a

**Q15** You mentioned that your company uses external agents. For which of the following do you use an external agent?

Base: all that answered 'external account' and/or 'external insurance company' and/or 'external lawyer' and/or 'external specialist consultant' to Q14 (1,494).

	2009 (%)	2008 (%)	2007 (%)
Providing advice on regulations	77	n/a	n/a
Informing you of your responsibilities	71	n/a	n/a
Providing legal guidance	69	n/a	n/a
Updating the business on changes to existing regulations	61	n/a	n/a
Communicating new regulations and the impact to your business	60	n/a	n/a
Completing paperwork	56	n/a	n/a
Working out policy implications for the business	44	n/a	n/a
Other	1	n/a	n/a
Don't know	2	n/a	n/a

**Q16 And why does your business use an external agent to help with complying with Planning/Tax/Health and Safety/Employment/Company Law regulations?**

Base: all that answered 'external account' and/or 'external insurance company' and/or 'external lawyer' and/or 'external specialist consultant' to Q14 (1,494).

**Top ten responses**

	<b>2009 (%)</b>	<b>2008 (%)</b>	<b>2007 (%)</b>
They are professional/have knowledge to deal with regulations	52	n/a	n/a
Don't have time to deal with it internally	14	n/a	n/a
Feel reassured/covered by using a professional	14	n/a	n/a
Too difficult to deal with internally	12	n/a	n/a
Easier to outsource	9	n/a	n/a
Don't have resources/staff to deal with it internally	8	n/a	n/a
Provides legal certainty/insurance	6	n/a	n/a
It is a legal requirement	3	n/a	n/a
Other	3	n/a	n/a
Do not want the responsibility of it	2	n/a	n/a

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## Section 4 – Business perceptions of changes to regulation

**Q17** For each of the following aspects of regulation, would you say it has become less time consuming, more time consuming, or has stayed about the same over the last 12 months?

		Less time consuming	Stayed the same	More time consuming	Don't know
Finding information about which regulations apply to your business	2009	4	61	32	3
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Finding guidance and advice explaining what you have to do to comply with a given regulation	2009	6	61	30	3
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Preparing and reporting facts and figures for government	2009	3	65	26	6
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Completing paperwork, including filling out forms and keeping records	2009	3	60	34	3
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Having to provide the same information more than once to Government	2009	2	63	28	7
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Being ready for and complying with inspections	2009	1	71	20	8
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Having to keep up to date with changes in existing regulation	2009	2	59	36	3
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Having to keep up to date with the introduction of new regulations	2009	2	57	39	3
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a
Updating policy/policies for your business when regulations change or are introduced	2009	2	62	32	4
	2008	n/a	n/a	n/a	n/a
	2007	n/a	n/a	n/a	n/a

**Q18** And overall, has complying with regulation become less time consuming, more time consuming, or stayed about the same over the last 12 months?

	2009 (%)	2008 (%)	2007 (%)
Become less time consuming	1	1	n/a
Stayed about the same	60	57	n/a
Become more time consuming	37	40	n/a
Don't know	1	1	n/a

**Q19** In the course of your business operations, has complying with regulation become easier, more difficult, or stayed about the same over the last 12 months?

	2009 (%)	2008 (%)	2007 (%)
Become easier	3	2	n/a
Stayed about the same	65	66	n/a
Become more difficult	30	30	n/a
Don't know	1	2	n/a

**Q20a** Why do you say complying with regulation has become easier over the last 12 months?

Base: all that answered 'become easier' to Q19 (57).

	2009 (%)	2008 (%)	2007 (%)
<b>Top ten responses</b>			
More aware of/used to regulations	23	n/a	n/a
Online service available	22	n/a	n/a
Good/clear/more information available	16	n/a	n/a
Other	11	n/a	n/a
Regulations better/less complicated	10	n/a	n/a
Receive help/support	7	n/a	n/a
Don't know	7	n/a	n/a
Consultants to deal with it	6	n/a	n/a
Fewer regulations introduced	6	n/a	n/a
Have smaller business	4	n/a	n/a

**Q20b** Why do you say complying with regulation has become more difficult over the last 12 months?

Base: all who answered 'more difficult to Q19, (639).

	2009 (%)	2008 (%)	2007 (%)
<b>Top ten responses</b>			
Too many regulations/keep introducing new regulation	43	n/a	n/a
Too time consuming/not enough time to deal with regulations	18	n/a	n/a
Regulations inconsistent/change too frequently	13	n/a	n/a
Too much paperwork/too many forms to fill in	13	n/a	n/a
Cost issues/expensive complying with regulations	10	n/a	n/a
Regulations complicated/unclear	9	n/a	n/a
Other	7	n/a	n/a
Means a lot more effort from us/have more to do now	6	n/a	n/a
Regulations impractical/difficult to comply with	6	n/a	n/a
Poor/lack of communication	4	n/a	n/a

**Q21** In the next 12 months, do you think that the burdens on business resulting from regulation will decrease, stay the same or increase?

	2009 (%)	2008 (%)	2007 (%)
Decrease	4	2	3
Stay the same	37	22	16
Increase	53	72	76
Don't know	6	4	5

**Q22** Over the last couple of years, the Government has introduced initiatives to reduce the administrative costs businesses incur when complying with regulation. Would you say for your business that these costs have generally reduced, increased or there has been no change?

	2009 (%)	2008 (%)	2007 (%)
Greatly reduced	1	n/a	n/a
Slightly reduced	3	n/a	n/a
Slightly increased	17	n/a	n/a
Greatly increased	11	n/a	n/a
No change	66	n/a	n/a
Don't know	3	n/a	n/a

**Q23** On balance, do you think that changes to complying with regulations over the last two years have...

	2009 (%)	2008 (%)	2007 (%)
...had a positive impact on your business	7	n/a	n/a
...had a negative impact on your business	22	n/a	n/a
...not had a significant impact at all	69	n/a	n/a
Don't know	2	n/a	n/a