

United Way Worldwide: MyFreeTaxes Survey

November 18-23, 2015

Report Date: January 28, 2016

LIVE UNITED

**United
Way**



Methodology

Survey Type: The national public opinion survey was conducted using Lightspeed GMI online survey.

Sample: National sample of 1,000 American adults with income of <\$62K. The total sample is balanced to be representative of the U.S. adult population in terms of age, sex, geographic region, race & education. The margin of error for the total sample is +/-4% with a confidence level of 95%.

Survey Date: November 18-23, 2015

Key Findings

Working families making \$62,000 or less are leaving money on the table during tax season, and don't have to.

- 72% are unaware that they qualify for free tax preparation services through MyFreeTaxes.com. Half of those surveyed do their taxes themselves, while nearly one third (29%) pay someone else to complete their returns.
- Many are unaware of the tax credits they have earned. Only 4 in 10 surveyed were aware of the Child Tax Credit, while fewer than 6 in 10 knew about the Earned Income Tax Credit. Some 20% were unaware of any tax credits.
- About 23% of those surveyed say they spend their refunds for food, while 22% spend the money on housing costs; 31% use their refund for utilities.

How did you file for your 2014 federal income taxes?

	Total
Total	N=1000
Single	53%
Married filing separately	7%
Married filing jointly	40%
N/A – I didn't file my federal income taxes	0%
Unsure/ I don't know	0%

What was your household's approximate 2014 adjusted gross income (AGI) (i.e., all take home pay)

	Total
Total	N=1000
Less than \$15,000	12%
\$15,000-\$24,999	16%
\$25,000-\$34,999	19%
\$35,000-\$44,999	16%
\$45,000-\$54,999	27%
\$55,000-\$62,000	10%
More than \$62,000	0%
Prefer not to answer	0%

Who prepared your 2014 federal income tax return?

	Total
Total	N=1000
Myself	50%
Spouse	7%
Friend	3%
Accountant	14%
Paid professional tax return preparation service	15%
Free professional tax return preparation service	6%
Other	5%

Overall how stressful, if at all, is it for you to prepare your taxes? Please use a scale of 1-5 with 1=Not at all Stressful, and 5=Extremely Stressful.

	Total
Total	N=501
Bottom 2	50%
1 Not at all Stressful	27%
2	23%
3	27%
4	16%
5 Extremely Stressful	7%
Top 2	23%

Are you aware that you are eligible for free tax return preparation services through a program called MyFreeTaxes?

	Total
Total	N=942
Yes	28%
No	72%

Which, if any, of the following tax credits do you know about?

	Total
Total	N=1000
Earned Income Tax Credit	57%
Mortgage Interest Credit	45%
Child Tax Credit	42%
Child & Dependent Care Tax Credit	38%
Health Coverage Tax Credit	31%
Low-Income Housing Credit	19%
Lifetime Learning Credit	13%
None of the above	19%

Do you usually owe federal taxes or receive a federal tax refund?

	Total
Total	N=1000
I usually owe taxes	21%
I usually receive a refund	79%

Typically, how much money do you receive back on your federal tax refunds?

	Total
Total	N=785
Less than \$1,000	53%
\$1,000-\$1,999	26%
\$2,000-\$2,999	10%
\$3,000-\$3,999	4%
\$4,000-\$5,000	4%
More than \$5,000	3%

How do you usually spend your tax refunds?

	Total
Total	N=1000
Utilities	31%
Personal Finance (savings, banking, investment)	25%
Food	23%
Housing Costs (rent, mortgage)	22%
Clothing	13%
Travel	10%
Transportation	9%
Childcare	3%
Household needs (general)	3%
Buy something big/special (electronics, special items, etc.)	2%
Education	1%
Fun/ Entertainment	1%
Health/medical expenses	1%
Other	1%
DK/NA	11%

How old are you?

	Total
Total	N=1000
18-24	13%
25-35	18%
36-45	15%
46-55	15%
56-65	16%
Over 65	25%

What is your gender?

	Total
Total	N=1000
Male	45%
Female	55%

What best describes your current employment status?

	Total
Total	N=1000
Full time- Not Self-Employed	30%
Part time- Not Self-Employed	13%
Self-Employed	5%
Student	4%
Retired	31%
Not employed	17%
Prefer not to answer	1%

What is your marital status?

	Total
Total	N=1000
Married	47%
Domestic Partnership	2%
Single, never been married	30%
Separated	1%
Divorced	13%
Widowed	6%
Prefer not to answer	0%

Which of the following ethnic groups best describes you?

	Total
Total	N=1000
White or Caucasian	85%
Black or African-American	7%
Latino, Hispanic or Mexican	5%
Asian or Pacific Islander	2%
Native American	1%
Other, please specify	1%
Count	1.02