



**Tax Return**  
Fieldwork Dates: 9th - 12th March 2018

**Conducted by YouGov**  
**On behalf of YouGov NY**

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**BACKGROUND**

This spreadsheet contains survey data collected and analysed by YouGov plc. No information contained within this spreadsheet may be published without the consent of YouGov Plc and the client named on the front cover.

Methodology: This survey has been conducted using an online interview administered to members of the YouGov Plc panel of 1.2 million individuals who have agreed to take part in surveys. Emails are sent to panellists selected at random from the base sample. The e-mail invites them to take part in a survey and provides a generic survey link. Once a panel member clicks on the link they are sent to the survey that they are most required for, according to the sample definition and quotas. (The sample definition could be "US adult population" or a subset such as "US adult females"). Invitations to surveys don't expire and respondents can be sent to any available survey. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is normally derived from census data or, if not available from the census, from industry accredited data. YouGov plc make every effort to provide representative information. All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information.

For further information about the results in this spreadsheet, please contact YouGov Plc +1 888.729.0773 or email omnibus.us@yougov.com quoting the survey details

**EDITOR'S NOTES - all press releases should contain the following information**

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1109 adults. Fieldwork was undertaken between 9th - 12th March 2018. The survey was carried out online. The figures have been weighted and are representative of all US adults (aged 18+).

NOTE: All press releases or other publications must be checked by YouGov Plc before use. YouGov requires 48hours to check a press release unless otherwise agreed.

- YouGov is registered with the Information Commissioner
- YouGov is a member of the British Polling Council

Any percentages calculated on bases fewer than 50 respondents must not be reported as they do not represent a wide enough cross-section of the target population to be considered statistically reliable. These figures will be italicised.

**YouGov NY**  
**Tax Return**

US\_nat Sample: 9th - 12th March 2018



Total	Gender		Age			Region				Race				No HS, High school graduate
	Male	Female	18 to 34	35 to 54	55+	Northeast	Midwest	South	West	White	Black	Hispanic	Other (NET)	
	A	B	C	D	E	F	G	H	I	J	K	L	M	

**KET\_q1. Do you file annual US tax returns? Please select the option that best applies.**

Unweighted base	1109	487	622	296	348	465	190	241	456	222	794	122	92	101	408
<b>Base: All US Adults</b>	1101	544	557	347	334	421	192	229	460	221	705	137	167	94	462
Yes, I usually file taxes myself or through an accountant	68%	70%	65%	65%	68%	70%	68%	70%	69%	62%	71%	66%	60%	63%	60%
No, someone else (e.g., partner/spouse, parent, etc.) usually files my taxes for me	16%	13%	19%	18%	19%	12%	19%	18%	14%	16%	16%	14%	18%	19%	18%
No, I usually do not file taxes at all	16%	16%	16%	17%	14%	17%	13%	12%	17%	21%	14%	20%	22%	19%	22%

**KET\_q2. How do you typically prepare your taxes? Please select the option that best applies.**

Unweighted base	768	353	415	191	245	332	127	172	326	143	564	83	56	65	244
<b>Base: All US Adults who usually file tax returns</b>	746	381	365	225	226	296	131	161	317	138	497	91	100	59	275
On paper (i.e., print, fill out on my own, and mail in)	7%	10%	4%	9%	7%	6%	7%	7%	7%	7%	7%	9%	6%	10%	9%
Using free fillable forms on the IRS's website	6%	9%	4%	11%	5%	4%	4%	5%	9%	5%	4%	2%	20%	5%	9%
Through a free tax software	25%	22%	29%	37%	19%	20%	25%	28%	26%	20%	27%	31%	15%	18%	27%
Through a paid tax software	22%	23%	20%	16%	29%	21%	27%	21%	20%	22%	21%	24%	21%	27%	11%
Through an accountant	35%	32%	38%	24%	34%	43%	34%	34%	32%	44%	36%	25%	36%	35%	38%
Other	4%	4%	5%	1%	6%	6%	3%	5%	6%	2%	4%	9%	2%	3%	5%
Don't know	1%	0%	1%	1%	0%	0%	-	1%	1%	1%	1%	-	-	1%	1%

**KET\_q3. When do you generally file your tax return?**

Unweighted base	768	353	415	191	245	332	127	172	326	143	564	83	56	65	244
<b>Base: All US Adults who usually file tax returns</b>	746	381	365	225	226	296	131	161	317	138	497	91	100	59	275
In January	11%	11%	10%	18%	8%	7%	8%	12%	10%	12%	10%	14%	8%	13%	12%
In February	41%	43%	40%	47%	53%	28%	46%	46%	41%	31%	40%	47%	50%	29%	45%
In March	29%	26%	32%	17%	26%	40%	30%	29%	29%	28%	31%	17%	27%	36%	27%
First week of April	9%	10%	8%	8%	8%	10%	8%	5%	9%	14%	9%	10%	8%	8%	7%
Second week of April	3%	2%	4%	3%	1%	4%	2%	3%	3%	4%	3%	2%	2%	4%	2%
Right before April deadline (i.e., April 15-16th this year)	3%	3%	3%	1%	1%	6%	5%	1%	3%	1%	3%	3%	1%	4%	2%
On the April deadline (i.e., April 17th this year)	1%	1%	0%	1%	2%	0%	-	2%	0%	2%	0%	1%	2%	1%	0%
After the April deadline	1%	2%	1%	0%	1%	3%	1%	-	1%	4%	2%	1%	-	-	1%
Not applicable - I don't file taxes based on the calendar year (e.g., file quarterly)	1%	1%	1%	1%	-	1%	-	-	1%	1%	0%	2%	-	3%	0%

**YouGov NY**  
**Tax Return**

US\_nat Sample: 9th - 12th March 2018



Total	Education			Marital Status						Children under the age of 18	
	Some college, 2-year	4-year	Post Grad	Married	Separated	Divorced	Widowed	Never married	Domestic / civil partnership	Yes	No
	O	P	Q	R	S	T	U	V	W	X	Y

**KET\_q1. Do you file annual US tax returns? Please select the option that best applies.**

Unweighted base	1109	377	203	121	516	17	128	54	362	32	260	849
<b>Base: All US Adults</b>	1101	348	191	101	514	14	123	46	373	32	288	813
Yes, I usually file taxes myself or through an accountant	68%	69%	78%	83%	74%	72%	56%	67%	64%	63%	71%	66%
		N	N.O	N.O	T.V	**	*	*		**		
No, someone else (e.g., partner/spouse, parent, etc.) usually files my taxes for me	16%	15%	15%	14%	20%	-	11%	8%	15%	10%	18%	16%
						**	*	*		**		
No, I usually do not file taxes at all	16%	17%	7%	3%	7%	28%	32%	25%	21%	27%	11%	18%
		P.Q				**	R*	R*	R	**		

**KET\_q2. How do you typically prepare your taxes? Please select the option that best applies.**

Unweighted base	768	260	164	100	382	12	82	37	235	20	191	577
<b>Base: All US Adults who usually file tax returns</b>	746	239	149	84	378	10	69	31	237	20	206	540
On paper (i.e., print, fill out on my own, and mail in)	7%	6%	8%	5%	6%	-	3%	5%	11%	9%	7%	7%
			*	*	*	**	*	*	R.T	**	*	*
Using free fillable forms on the IRS's website	6%	5%	5%	5%	8%	8%	7%	2%	5%	-	10%	5%
			*	*	*	**	*	*		**	*	*
Through a free tax software	25%	28%	22%	16%	18%	15%	27%	22%	35%	36%	23%	26%
		Q	*	*	*	**	*	*	R	**	*	*
Through a paid tax software	22%	26%	26%	40%	24%	44%	19%	16%	21%	4%	26%	20%
		N	N	N.O.P*	*	**	*	*		**	*	*
Through an accountant	35%	31%	36%	31%	40%	25%	33%	49%	24%	43%	31%	36%
			*	*	V	**	*	V*		**	*	*
Other	4%	5%	2%	4%	4%	8%	8%	5%	3%	8%	2%	5%
			*	*	*	**	*	*		**	*	*
Don't know	1%	0%	-	-	0%	-	3%	-	1%	-	1%	1%
			*	*	*	**	*	*		**	*	*

**KET\_q3. When do you generally file your tax return?**

Unweighted base	768	260	164	100	382	12	82	37	235	20	191	577
<b>Base: All US Adults who usually file tax returns</b>	746	239	149	84	378	10	69	31	237	20	206	540
In January	11%	11%	8%	10%	9%	9%	11%	5%	14%	12%	13%	9%
			*	*	*	**	*	*		**	*	*
In February	41%	40%	38%	38%	40%	32%	37%	41%	44%	43%	56%	36%
			*	*	*	**	*	*		**	Y*	*
In March	29%	32%	28%	31%	33%	19%	34%	24%	22%	34%	18%	33%
			*	V	**	**	V*	*		**	*	X
First week of April	9%	9%	13%	6%	9%	16%	5%	3%	9%	11%	7%	10%
			*	*	**	**	*	*		**	*	*
Second week of April	3%	2%	4%	5%	4%	9%	4%	6%	1%	-	3%	3%
			*	*	*	**	V*	V*		**	*	*
Right before April deadline (i.e., April 15-16th this year)	3%	4%	3%	2%	2%	15%	4%	13%	3%	-	0%	4%
			*	*	*	**	*	R.V*		**	*	*
On the April deadline (i.e., April 17th this year)	1%	1%	1%	1%	0%	-	1%	5%	1%	-	1%	1%
			*	*	*	**	*	R.V*		**	*	*
After the April deadline	1%	1%	2%	5%	2%	-	1%	2%	1%	-	-	2%
			O*	*	**	*	*	*		**	*	*
Not applicable - I don't file taxes based on the calendar year (e.g., file quarterly)	1%	-	2%	1%	0%	-	2%	-	1%	-	-	1%

**YouGov NY**  
**Tax Return**

US\_nat Sample: 9th - 12th March 2018



Total	Gender		Age			Region				Race				No HS, High school graduate
	Male	Female	18 to 34	35 to 54	55+	Northeast	Midwest	South	West	White	Black	Hispanic	Other (NET)	
			*			*					*	**	J*	
Don't know	2%	2%	5% D*	0%	2%	2%	2%	2%	2%	2%	3%	2%	2%	3%

**KET\_q4. How confident are you that you file your taxes correctly every year?**

Unweighted base	768	353	415	191	245	332	127	172	326	143	564	83	56	65	244
<b>Base: All US Adults who usually file tax returns</b>	746	381	365	225	226	296	131	161	317	138	497	91	100	59	275
Very confident	68%	66%	71%	52% *	70% C	80% C,D	70% *	71%	68%	69%	73% K,M	53% *	68% **	55% *	68%
Somewhat confident	29%	30%	27%	42% D,E*	29% E	18%	27% *	24%	32%	28%	26%	33% *	32% **	41% J*	28%
Not very confident	3%	3%	2%	5% *	1%	3%	2% *	5%	2%	3%	2%	13% J,M*	- **	- *	4%
Not at all confident	1%	1%	0%	1% *	0%	-	1% *	-	1%	-	0%	1% *	- **	4% J*	0%

**KET\_q5. Which ONE of the following would you prefer for your tax return?**

Unweighted base	768	353	415	191	245	332	127	172	326	143	564	83	56	65	244
<b>Base: All US Adults who usually file tax returns</b>	746	381	365	225	226	296	131	161	317	138	497	91	100	59	275
Simple tax forms with fewer options for deductions	53%	52%	55%	49% *	52%	57%	51% *	58%	51%	54%	58% K	40% *	41% **	50% *	57% Q
Complex tax forms with more options for deductions	33%	37% B	28%	34% *	35%	31%	38% G*	24%	36% G	32%	29%	41% *	49% **	30% *	30%
Don't know	14%	11%	17%	16% *	13%	13%	11% *	18%	13%	13%	13%	20% *	10% **	20% *	14%

**KET\_q6. How much, if at all, do you enjoy filing your taxes?**

Unweighted base	768	353	415	191	245	332	127	172	326	143	564	83	56	65	244
<b>Base: All US Adults who usually file tax returns</b>	746	381	365	225	226	296	131	161	317	138	497	91	100	59	275
Enjoy a lot	11%	11%	11%	22% D,E*	8%	4%	21% G,H*	7%	8%	12%	9%	18% J*	15% **	12% *	14%
Enjoy somewhat	23%	24%	22%	30% E*	25% E	17%	16% *	22%	28% F	21%	20%	25% *	41% **	16% *	24%
Don't enjoy very much	30%	28%	32%	23% *	33%	33%	27% *	31%	32%	26%	31%	27% *	28% **	25% *	28%
Don't enjoy at all	32%	33%	31%	19% *	29%	43% C,D	32% *	33%	29%	38%	36% K	23% *	11% **	41% K*	27%
Don't know	4%	4%	5%	6% *	5%	3%	5% *	7%	3%	3%	4%	7% *	4% **	6% *	7%

**KET\_q7. If you were to get a tax rebate this year, which one, if any, of following would you be MOST likely to do with the rebate?**

Unweighted base	768	353	415	191	245	332	127	172	326	143	564	83	56	65	244
<b>Base: All US Adults who usually file tax returns</b>	746	381	365	225	226	296	131	161	317	138	497	91	100	59	275
Splurge on experiences (e.g., vacations, concerts)	6%	7%	5%	9% E*	7%	3%	7% *	5%	6%	5%	7%	3% *	3% **	5% *	6%
Splurge on items (e.g. clothes, electronics)	7%	9%	5%	11% E*	9% E	2%	12% H*	5%	4%	11% H	5%	5% *	15% **	12% J*	4%
Splurge on something else	8%	10% B	5%	13% D,E*	4%	5%	4% *	8%	10%	6%	4%	15% J*	21% **	6% *	13% O,P,Q
Spend it on bills	20%	18%	22%	17% *	24%	20%	22% *	21%	18%	20%	22%	21% *	14% **	15% *	21%

**YouGov NY**  
**Tax Return**

US\_nat Sample: 9th - 12th March 2018



**KET\_q4. How confident are you that you file your taxes correctly every year?**

Total	Education			Marital Status						Children under the age of 18		
	Some college, 2-year	4-year	Post Grad	Married	Separated	Divorced	Widowed	Never married	Domestic / civil partnership	Yes	No	
Don't know	2%	2%	2%	1%	**	*	*	4%	**	1%	3%	
Unweighted base	768	260	164	100	382	12	82	37	235	20	191	577
<b>Base: All US Adults who usually file tax returns</b>	746	239	149	84	378	10	69	31	237	20	206	540
Very confident	68%	70%	64%	71%	74%	46%	81%	72%	56%	68%	67%	69%
Somewhat confident	29%	27%	34%	28%	22%	40%	19%	28%	40%	32%	31%	27%
Not very confident	3%	2%	2%	1%	3%	-	-	-	4%	-	1%	3%
Not at all confident	1%	1%	-	-	0%	14%	-	-	1%	-	0%	1%

**KET\_q5. Which ONE of the following would you prefer for your tax return?**

Unweighted base	768	260	164	100	382	12	82	37	235	20	191	577
<b>Base: All US Adults who usually file tax returns</b>	746	239	149	84	378	10	69	31	237	20	206	540
Simple tax forms with fewer options for deductions	53%	54%	50%	43%	53%	36%	49%	50%	54%	67%	46%	56%
Complex tax forms with more options for deductions	33%	31%	40%	38%	35%	37%	39%	37%	30%	13%	42%	29%
Don't know	14%	15%	10%	19%	12%	26%	12%	13%	16%	21%	11%	15%

**KET\_q6. How much, if at all, do you enjoy filing your taxes?**

Unweighted base	768	260	164	100	382	12	82	37	235	20	191	577
<b>Base: All US Adults who usually file tax returns</b>	746	239	149	84	378	10	69	31	237	20	206	540
Enjoy a lot	11%	8%	10%	11%	9%	14%	8%	9%	14%	20%	18%	8%
Enjoy somewhat	23%	27%	16%	21%	24%	31%	32%	20%	19%	12%	34%	19%
Don't enjoy very much	30%	31%	35%	24%	29%	24%	25%	29%	33%	17%	23%	32%
Don't enjoy at all	32%	30%	37%	42%	34%	23%	33%	41%	28%	34%	21%	36%
Don't know	4%	4%	2%	1%	3%	8%	2%	-	6%	17%	3%	5%

**KET\_q7. If you were to get a tax rebate this year, which one, if any, of following would you be MOST likely to do with the rebate?**

Unweighted base	768	260	164	100	382	12	82	37	235	20	191	577
<b>Base: All US Adults who usually file tax returns</b>	746	239	149	84	378	10	69	31	237	20	206	540
Splurge on experiences (e.g., vacations, concerts)	6%	4%	6%	11%	6%	-	3%	-	8%	-	9%	5%
Splurge on items (e.g. clothes, electronics)	7%	11%	6%	6%	6%	15%	6%	-	9%	15%	11%	5%
Splurge on something else	8%	5%	5%	1%	10%	14%	4%	8%	5%	-	13%	5%
Spend it on bills	20%	25%	13%	14%	18%	23%	26%	29%	21%	18%	22%	19%

**YouGov NY**  
**Tax Return**  
 US\_nat Sample: 9th - 12th March 2018



	Total	Gender		Age			Region				Race				No HS, High school graduate
		Male	Female	18 to 34	35 to 54	55+	Northeast	Midwest	South	West	White	Black	Hispanic	Other (NET)	
Save it for long term	25%	25%	25%	18% *	21%	32% C.D	20% *	26%	28% I	18%	25%	26% *	17% **	28% *	21%
Pay off debts	24%	21%	27%	20% *	26%	25%	26% *	24%	23%	25%	25%	22% *	22% **	22% *	19%
Donate to a charitable cause	1%	1%	1%	1% *	-	1%	1% *	1%	1%	1%	1%	- *	- **	1% *	1%
Other	4%	4%	5%	2% *	6%	5%	4% *	7%	3%	4%	5%	3% *	1% **	4% *	5%
Don't know	6%	6%	6%	8% *	4%	6%	4% *	4%	6%	10% G	6%	5% *	8% **	7% *	9% P

Cell Contents (Column Percentages, Statistical Test Results), Statistics (Column Proportions, (5%): A/B, C/D/E, F/G/H/I, J/K/L/M, N/O/P/Q, R/S/T/U/V/W, X/Y, Z/AA/AB/AC, AD/AE/AF/AG/AH/AI/AJ/AK/AL/AM/AN/AO/AP, Minimum Base: 30 (\*\*), Small Base: 100 (\*\*))

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 US\_nat Sample: 9th - 12th March 2018



	Total	Education			Marital Status						Children under the age of 18	
		Some college, 2-year	4-year	Post Grad	Married	Separated	Divorced	Widowed	Never married	Domestic / civil partnership	Yes	No
Save it for long term	25%	24%	31%	26% *	26%	17% **	22% *	34% *	23%	12% **	17% *	27%
Pay off debts	24%	20%	34% N.O	32% N.O*	26%	24% **	24% *	15% *	22%	25% **	21% *	25%
Donate to a charitable cause	1%	0%	1%	2% *	1%	- **	- *	- *	1%	- **	1% *	1%
Other	4%	4%	4%	5% *	4%	7% **	10% R*	2% *	4%	4% **	2% *	5%
Don't know	6%	6%	2%	4% *	4%	- **	4% *	11% *	8%	25% **	2% *	8%

Cell Contents (Col