

The Public and Taxes

* TOPLINE RESULTS *

Interviews for this study were conducted on the SSRS Opinion Panel Omnibus, **March 15 – 18 and April 5 – 7, 2024**, among a nationally representative sample of **2,012 adults**. The margin of error for total respondents is +/- 2.44 percentage points at the 95% confidence level. The design effect is 1.25.

The SSRS Opinion Panel Omnibus is a multi-client probability-based survey that fields twice a month. It delivers a nationally representative sample of 1000+ adults age 18 or older in English with a Spanish-language option. Data collection is conducted online and via phone (for non-internet and web-reluctant respondents) using the SSRS Opinion Panel. More information about SSRS is available at www.ssrs.com.

SPOT1. Federal income taxes are due in the third week of April. Which best describes you, regarding your income taxes?

	As of March 15-18, 2024	As of April 5-7, 2024	As of April 5-7, among those who have filed or will file
	<i>n=1,007</i>	<i>n=1,005</i>	<i>n=897</i>
	%	%	%
Already filed your income taxes	47	58	66
Will file them by the April deadline	39	26	29
Will apply for an extension	4	4	5
Don't file income taxes or don't earn income	10	12	NA
Don't know/refused/web blank	-	-	NA

SPOT2. How will/did you prepare and file your taxes?

Based on those who have filed or will file taxes (n=1,810)

	%
Prepare and file them yourself using online tax software like TurboTax	42
Use an accountant to prepare and file your taxes	31
Use a brick-and-mortar tax preparation company like H&R Block	11
Have a friend or family member prepare and file your taxes	9
Prepare and file them yourself without tax software	6
Some other way	2
Don't know/refused/web blank	-

SPOT3. Which do you expect regarding your federal income taxes this year?

Based on those who have filed or will file taxes (n=1,810)

	%
A refund: I expect to get a refund or already got a refund	58
Owe money: I expect to owe or already paid	26
Not sure yet	15
Don't know/refused/web blank	*

SPOT4. How important, if at all, is getting a tax refund to your overall financial situation?

Based on those who are getting or expect to get a tax refund or are not sure if they will (n=1,303)

	%
Very important	41
Somewhat important	26
Not too important	22
Not at all important	10
Don't know/refused/web blank	*

SPOT5. Which of the following are you most likely to do with your federal tax refund?

Based on those who are getting or expect to get a tax refund (n=1,040)

	%
Pay bills or debts	45
Save or invest it	26
Spend it on everyday items like food or clothing	12
Make home improvements	8
Spend it on something special or fun	4
Spend it on a vacation	3
Donate it to charity	1
Don't know/refused/web blank	-

SPOT6. In general, do you feel you pay more than your fair share in federal income taxes, less than your fair share, or is the amount you pay about right?

Based on total adults (n=2,012)

	%
More than fair share	53
Less than fair share	5
About right	41
Don't know/refused/web blank	*