

EAST RUTHERFORD NJ 07073

# 2010 Free File Awareness & Attitudinal Research

OMB # xxxx-xxxx RMR #10-08-265 FALL 2010 CARD I

### SAMPLE DESIGN & RESPONDENT INFORMATION

All survey respondents will be <u>18-64</u> year-old <u>Eligible Non-Users Of Free File In 2010</u> – Individual Taxpayers who <u>met Free</u> File income requirements but have not used it in **past 2 years**, who were <u>Self-Prepared in FY 2010</u> (i.e., filed 2010 return via Paper, V-Code, or other Online methods). NOTE: all respondents MUST ALSO have decided how their return was filed.

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# AFTER REACHING A POTENTIAL RESPONDENT, INTRODUCE YOURSELF WITH:

Hello, I am \_\_\_\_\_\_ of Russell Research in New York, an independent national survey research firm. The Internal Revenue Service has asked us to survey Taxpayers and to get feedback on the IRS' tax filing services. Your participation in this survey is entirely voluntary and your responses to all questions will be kept anonymous by Russell Research and never identified with you personally to the IRS or anyone else in Government. The survey should take no more than 15 minutes to complete and we'd appreciate your participation. Would you be willing to help with the survey?

- IF "YES", CONTINUE.
- IF "NO", THANK & RECORD AS "Ref" IN BOX ABOVE AND OFFER COMMENTS ADDRESS (FOUND AT END OF SURVEY).

IF "YES", READ: Thank you. Let's begin the survey.

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START \	∧/IT <b>L</b> I•			PAGE
1.		ou: are you <u>male or female</u>	? (CIRCLE ANSWER & MONITOR GENDER DISTRIBUTION.)	
			Male1	0
			Female2	
			Refused & Can't Discern Gender3	
2.		T APPLY. MONITOR THE # OF ST	following describe your <u>occupation</u> ? (READ CHOICES & TUDENTS, ESPECIALLY WHEN AUGMENTING THE 18-24 FIRST-	
	TIIVIE FILEKS PZ I	SEGIVIENT.)	Employed Full-Time1	0
			Employed Part-Time2	
			Unemployed But Looking For Employment3	
			In Military Service4	
			A Homemaker5	
			Retired6	
			A Student7	
			(DON'T READ BUT CIRCLE IF:) Refusedy	
		4 & CIRCLE ALL THAT APPLY.)	ternet, on a regular or occasional basis? (ROTATE LIST,	
		•	1	(
		_	2	
		Reading The Newspaper Or Ma	agazine Articles Online3	
		Re-Newing Auto Registrations	Or Other Government Forms4	
		Filing Or Paying Local Or State	Taxes5	
		Online Banking Or Bill Payment	t6	
			Or Social Websites Such As Facebook, MySpace, etc7	
		Using The Web Browser On A C	Cell Phone8	
			AGE 55-64 NON-INTERNET-AVERSE SEGMENT, RESPONDENT	
			LEAST ONE OF THE ABOVE ACTIVITIES. OTHERWISE, THANK D OFFER COMMENTS ADDRESS).	
4.	HOLDS <u>AGE</u> , IDE	NTIFIABLE FROM IRS EXTRACTS.	RECORD & MONITOR AGE DISTRIBUTION.	
			18-241	(
			25-34	
			35-443	
			45-544	
			55-645	
5.	HOLDS # DEPEN	<b>DENTS</b> , IDENTIFIABLE FROM IRS	EXTRACTS. RECORD.	
			# DEPENDENTS (TAB AS 1, 2, 3, 4, 5+)	
6.	HOLDS <b>A.G.I</b> , IDI	ENTIFIABLE FROM IRS EXTRACTS.	. RECORD.	

Negative AGI.....1

..... \$0 to \$17,000.....2 \$17,001 to \$25,000......3 \$25,001 to \$35,000......4

\$35,001 to \$50,000	5
\$50,001 to \$57,000	6

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#### AFTER THE 3 CLASSIFICATION QUESTIONS, SEGUE TO MAIN SURVEY WITH:

As noted at the start, the purpose of this survey is to get your feedback on the IRS' tax filing services. Specifically, we want to talk with you about how you filed your <u>2010 Federal Income Tax Return</u> – the one you filed earlier this year, <u>in 2010</u>, for Tax Year 2009.

7.	First, did you <u>file a</u>	<u> Federal Income</u>	<u>Tax Return in 2010</u> ?	(CIRCLE ANSWER BELOW.)

Yes1	00
No(SHOULD NOT OCCUR, BUT IF IT DOES, TERM & RECORD)	

8. <u>Who prepared</u> your 2010 Federal Income Tax Return? Was it prepared by...(READ CHOICES & CIRCLE ONE ANSWER.)

You - Yourself	1
A Relative	
A Friend	
A Paid Tax Preparer	4
An Unpaid Tax Preparer	5
Someone At An IRS Taxpayer Assistance Center	
Or By Someone Else	

9. And who was responsible for deciding HOW your 2010 Federal Income Tax Return was prepared? Was it...(READ CHOICES & CIRCLE ONE ANSWER.)

You - Yourself (ALL MUST BE <u>SELF-PREPARED</u> & ANSWER "SEL	F" TO QUALIFY)1
A Relative	(THANK & TERM)
A Friend	(THANK & TERM)
A Paid Tax Preparer	(THANK & TERM)
An Unpaid Tax Preparer	(THANK & TERM)
Someone At An IRS Taxpayer Assistance Center	(THANK & TERM)
Or By Someone Else	(THANK & TERM)

- 10. Please tell me all of the ways or methods of filing a Federal Income Tax Return that you are aware of. (DO NOT READ PRE-LIST. CIRCLE ANY RESPONSES THAT ARE IN THE LIST AND ENTER ANY OTHERS THAT ARE NOT. RECORD ALL ANSWERS UNDER COL. 10, BEING SURE TO PROBE FULLY, USING THIS PROBE:) Are there any other methods of filing a Federal Income Tax Return that you are aware of?
- 11. Which, if any, of the following <u>following methods of filing a Federal Income Tax Return are you aware of?</u> (ROTATE AND READ ALL METHODS *NOT ALREADY CIRCLED* UNDER COL. 10 & CIRCLE ALL THAT APPLY UNDER COL. 11 BELOW.)

 WHILE ALL ARE SELF-PREPARED, THEY MAY BE AWARE OF OTHER METHODS.		10 Unaided <u>Awareness</u>	11 Aided <u>Awareness</u>	
Using The Free File Return Preparation And Filing Service Found	At IRS.Gov	1	1	00-00
Using A Return Preparation And Filing Service Found At Websites	OTHER THAN IRS.gov	<u>v</u> 2	2	
Using A <u>Software Package To Both Prepare AND File</u> The Return		3	3	
Using Software To Prepare The Return But Then Printing It And N	<u>lailing</u> It To The IRS	4	4	
Using <u>A Tax Preparer Who Prepares AND Files The Return Electron</u>	nically	5	5	
Receiving A Completed Return From A <u>Tax Preparer And Then M</u>	ailing It To The IRS	6	6	
Preparing The Return On Paper & Then Mailing It To The IRS		7	7	
Methods Other Than Those Above (ENTER VERBATIM RESPONSE	S)	8	8	
DO NOT READ, BUT CIRCLE IF: Don't Know/Can't Think Of Any		9	9	

IF "Using The Free File Return Preparation And Filing Service Found At IRS.Gov" IS THE ANSWER TO Qs 10 OR 11 ABOVE, ASK Qs 12-13-14.

12.	You mentioned that you are aware of the Free File Return Preparation And Filing Found At IRS.gov. <u>Approximately when did you first become aware of the Free File</u>			
	at IRS.gov? (DO NOT READ CHOICES. CIRCLE ANSWER COVERING TIME PERIOD IN RESPONSE.)			
	Within The Past Year		1	00
	1 To 2 Years Ago		2	
	2 To 3 Years Ago		3	
	More Than 3 Years Ago		4	
	Don't Recall	•••••	5	
13.	How did you first become aware of the Free File service found at IRS.gov? (DO N CHOICES. CIRCLE 1 <sup>ST</sup> RESPONSE UNDER COL. A BELOW. THEN, CIRCLE ANY OTHER RESPONSES UNDE IN BOTH CASES, ASK THE PARENTHETICAL PROBES.)			
		13A 1 <sup>ST</sup> MENT	13B OTHER MENTS	
	While Visiting IRS.gov For Information Or Help With Taxes	1	1	00
	From A Relative, Friend Or Colleague	2	2	
	From The IRS Federal Income Tax Return Package	3	3	
	From IRS Materials Other Than The Federal Income Tax Return Package (What Other IRS Materials?)	4	4	
	Saw Or Heard About It On TV	5	5	
	Saw Or Read About It In A Newspaper Or Magazine	6	6	
	On The Internet - But Not On The IRS Internet Website (Please Describe These Other Sites)	7	7	
	From Movie Trailers - Saw It Advertised In Movie Trailers/Movies	8	8	
	(LAST:) Some Other Way (SPECIFY)	9	9	
14.	And in which if any of the following <u>ways have you ever heard about the Free File</u> <u>found at IRS.gov</u> ? Have you heard about it( <u>READ CHOICES</u> & CIRCLE ALL THAT APPLY. BE ASK THE PARENTHETICAL FOLLOWUP PROBES.)			
	□ While Visiting IRS.gov For Information Or Help With Taxes		1	00
	□ From A Relative, Friend Or Colleague	•••••	2	
	From The IRS Federal Income Tax Return Package		3	
ROTATE PAIR BUT READ IN	From IRS Materials Other Than The Federal Income Tax Return Package (What Other IRS Material	s?)	4	
SEQUENCE.	□ Saw Or Heard About It On TV		5	
	□ Saw Or Read About It In A Newspaper Or Magazine	•••••	6	
	On The Internet – But Not On The IRS Internet Website (Please Describe These Other Sites)		7	
	☐ From Movie Trailers – Saw It Advertised In Movie Trailers/Movies	•••••	8	

# **ASK ALL:**

15. I am going to read a description of Free File. Please listen carefully as I will ask you some questions about it when I am finished.

#### READ FREE FILE DESCRIPTION SLOWLY AND CLEARLY:

For Taxpayers eligible to use it, the Free File service at IRS.gov provides step-by-step instruction and <u>free</u> Federal income tax preparation and electronic filing.

The Free File service is a partnership between the IRS and the Free File Alliance LLC, a group of private sector tax software companies.

Many of these companies also offer free or paid state tax preparation and e-filing services – though some of the companies may not offer state tax preparation and e-file services for all states.

<u>Note</u>: embedded to the right is the description of Free File being used in Task Order 17, the Marketing Focus Groups. We <u>did not use that description here</u> and <u>kept a more generic description</u> because of the agreement during A&A Kickoff that the Free File team wants to <u>focus more on the Traditional product</u> and that if we mention "Fillable Forms" here, it will likely introduce <u>confusion and affect this study's results</u>.



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16.	Our records show that you were eligible to use the Free File service at IRS.gov when you filed your Federal return this year. Assuming you are eligible to use Free File in the future, how likely are you to go to the IRS's website, IRS.gov, and use the Free File service? Do you think you(READ CHOICES AND CIRCLE ONE ANSWER.)	
	Definitely Will	00
	Probably Will Not2 Or, Definitely Will Not Use Free File In The Future1	
17.	You said you (INSERT RESPONSE TO Q16) use Free File in the future. Why do you feel that way? Please be as specific as possible. (RECORD FULL VERBATIM & PROBE UNTIL RESPONSE EXHAUSTED.)	

18. How important a role does the fact that it's "<u>free</u>" play in your interest in using Free File in the future? Is the "free" aspect of this service...(READ CHOICES AND CIRCLE ONE ANSWER.)

Extremely Important	5
Very Important	4
Somewhat Important	
Not Very Important	2
Or, Not At All Important	1

19. Next, I'm going to read some <u>statements about the Free File service</u>. After I read each one, please tell me whether you "completely agree", "mostly agree", "somewhat agree", "somewhat <u>dis</u>agree", or "completely <u>dis</u>agree" that the statement would describe Free File. Let's start with...(<u>RANDOMIZE</u> STATEMENTS, READ EACH ONE, CIRCLE RATING & CONTINUE UNTIL ALL HAVE BEEN RATED.) (NOTE: DO NOT OFFER "DON'T KNOW" AS A CHOICE, BUT CIRCLE IT IF RESPONDENT CANNOT RATE A STATEMENT.)

		Com-		Some-	Some-	Com-		
		pletely	Mostly	what	what	pletely	Don't	
		<u>Agree</u>	<u>Agree</u>	<u>Agree</u>	<u>Disagree</u>	<u>Disagree</u>	<u>Know</u>	
	Would Be Better Than Other Methods Of Filing Taxes	5	4	3	2	1	Υ	00
	Would Be A Way To File Quickly And Get It Over With	5	4	3	2	1	Υ	00
	Would Be A Way To Get Your Refund Faster	5	4	3	2	1	Υ	00
	Since It Is On The IRS Website, It Would Be More Accurate	5	4	3	2	1	Υ	00
	Since It Is On The IRS Website, It Would Be Safer And More Secure.	5	4	3	2	1	Υ	00
	Is A Method Of Filing That You Would Find Only At The IRS Website	5	4	3	2	1	Υ	00
	Would Be A Completely Cost-Free Method Of Preparation And Filin	g5	4	3	2	1	Υ	00
	Would Be Easy To Use, With Little Hassle	5	4	3	2	1	Υ	00
	Would Be Less Expensive Than Having To Buy Tax Software	5	4	3	2	1	У	00

- 20. <u>Is there any particular reason why you did NOT use Free File</u> this year to prepare and file your Federal Income Taxes? (DO NOT READ PRE-LIST. IN COL. 20, CIRCLE ANY RESPONSES THAT ARE IN THE LIST AND ENTER ANY OTHERS THAT ARE NOT. <u>PROBE</u> WITH:) Are there any <u>other reasons</u> why you did NOT use Free File this year? (SECURE DETAILED RESPONSE.) (<u>IF RESPONDENT ASKS HOW WE KNOW THEY DIDN'T USE FREE FILE</u>, EXPLAIN THAT OUR LIST OF TAXPAYERS ARE ALL NON-USERS OF FREE FILE.)
- 21. I'm going to read a list of <u>other possible reasons for NOT using Free File at the IRS website to</u> file your Federal Income Tax Return. After I read each one of these, please tell me <u>if it</u> was a reason that you chose NOT to use Free File in 2010. (ROTATE AND READ ALL REASONS NOT ALREADY CIRCLED UNDER COL. 20 & CIRCLE ALL THAT APPLY UNDER COL. 21 BELOW.)

	20 Unaided <u>Reasons</u>	<u>21</u> Prompted <u>Reasons</u>	
<u>Tried</u> To Use It, <u>But</u> It Was Too Difficult/Hard To Understand	1	1	00-00
Felt That The Free File Website Had <u>Insufficient Or Confusing Instructions</u>	2	2	
Found That A Taxpayer Cannot File Both State & Federal Returns Using Free File	3	3	
Thought It Was Going To Be Free, But It Turned Out That It Was Not Free	4	4	
Had A <u>Bad Experience</u> With Free File In The Past	5	5	
Wanted A Refund Anticipation Loan & Found That Free File Didn't Offer It	6	6	
Did Not Qualify On The Free File Income Requirement	7	7	
Didn't Have <u>Access</u> To A Computer/The Internet	1	1	
Tried To Use Free File But Couldn't Link To The Free Websites	2	2	
<u>Did Not Remember</u> That Free File Was A Tax Filing Option	3	3	
<u>Don't Trust</u> Electronic Filing Or Have Concerns About Internet Security	4	4	
Free File Does Not Let You Import Your Prior Year Tax Information	5	5	
Was <u>Concerned About The AMT</u> - the Alternative Minimum Tax		1	
Was Uncertain About Recent <u>Tax Law Changes</u>		2	
Thought <u>You Did Use</u> Free File in 2010	3	3	
<u>Used Some Other Free Filing Service</u> That Did Not Involve Accessing IRS.Gov	4	4	
Other (PROBE THIS OUT FULLY)	5	5	
(DO NOT READ, BUT CIRCLE IF:) Don't Know Why I Did Not Use Free File In 2010	6	6	

				PAGE 7
22.	We've talked about Free File. If the IRS were to send you information o	r updates	about	
	Free File, how would you prefer to receive this information? Should it cor	ne to you.	(READ	
	CHOICES & CIRCLE ALL THAT APPLY BELOW, ENTERING ANY RESPONSES WHEN PROBING.)	-		
	In The Mail		1	00
	Be Available For You To Pick Up At A Post Office/Library			00
	Be Available For You To Pick Up At An IRS Office			
	From Contact With An IRS Tax Specialist/IRS Employee			
	From The IRS's Website - IRS.gov		5	
	From Other Internet Websites (SPECIFY)		6	
	Via e-mail		7	
	Via Electronic Bulletin Board			
	From Advertising			
	From News Articles			00
	From Software Companies			
	Some Other Way (SPECIFY)		3	
	(DON'T READ) Don't Know/Refused	•••••	4	
23.	Next, I'd like to ask you about the types of media you read, listen to, or wa	tch First	which	
20.				
	if any of the following types of Printed Or Online Media do you either sub			
	on a regular basis? (READ LIST AND CIRCLE ALL THAT APPLY UNDER COL. "A".) THEN			
	THIS PROBE: And which one of those types of Print Or Online Media do you	spend the	<u>e most</u>	
	time reading? (DON'T READ - CIRCLE ONE ANSWER UNDER COL. "B".)			
		23A	23B	
		Subscribe/ Read	Spend Most Time	
		<u>Regularly</u>	Reading	
	Print Or Online National Newspapers Such As The New York Times Or USA Today	1	1	00-00
	Print Or Online Editions Of Your Local Newspaper(S)	2	2	
	Print Or Online National News Magazines Such As Time Or Newsweek	3	3	
	Print Or Online Sports Magazines Such As Sports Illustrated Or ESPN The Magazine		4	
	Print Or Online Business Publications Such As Business Week Or The Wall Street Journal		5	
	Print Or Online Local Business Publications, Magazines Or Journals		6	
	Print Or Online Fashion Magazines Such As Allure, Cosmopolitan, Vogue, Esquire, GQ, Etc		7	
	Print Or Online Entertainment Magazines Such As People, Or TV Guide		8	
	Print Or Online Women's Magazines Such As Oprah, Better Homes & Gardens, Etc		9	
	Print Or Online Computer Magazines		0	
	Internet Or Online Blogs, Bulletin Boards, Chat Rooms, Etc	X	Χ	
	None Of The Above (IF CIRCLED IN A, NO NEED TO FOLLOW-UP WITH B)	у		
24	Which if any of the following types of Radio Formats do you listen to rec	ularly 2 /DE	AD LICT	
24.	Which, if any, of the following types of Radio Formats do you listen to regu			
	AND CIRCLE ALL THAT APPLY UNDER COL. "A".) THEN, FOLLOW UP WITH THIS PROBE: A		<del></del>	
	those types of Radio Formats do you <u>spend the most time listening to</u> ? (DO	<u> DN'T READ</u> -	CIRCLE	
	ONLY ANSWER UNDER COL. "B".)	24A	24 <u>B</u>	
		Listen	Spend	
		То	Most Time	
	All Navia Chaffana	Regularly 4	Listening To	00.00
	All-News Stations		1	00-00
	All-Talk Stations		2	
	All-Sports/Sports Talk Stations		3	
	Financial News Stations		4	
	AM Mixed Format Stations (Talk Plus News Plus Features)	5	5	

AM Music Stations......6

FM Music Stations.......7

None Of The Above (IF CIRCLED IN A, NO NEED TO FOLLOW-UP WITH B)......y

6

7

25. Which, if any, of the following types of TV Programs Or Channels do you watch on a regular basis? (READ LIST AND CIRCLE ALL THAT APPLY UNDER COL. "A".) THEN, FOLLOW UP WITH THIS PROBE: And which one of those types of TV Programs Or Channels do you spend the most time watching? (DON'T READ - CIRCLE ONE ANSWER UNDER COL. "B".)

	<u>25A</u>	<u>25B</u>	
		Spend	
	Watch	Most Time	
	<u>Regularly</u>	Watching	
Early Morning Shows Such As Today, This Morning, Or Good Morning America	1	1	00-00
Later Morning Talk Shows Such As Regis & Kelly, Etc		2	
Afternoon Soap Operas	3	3	
Game Shows	4	4	
Home Improvement, Design, And Cooking Shows	5	5	
Early Evening News Programs	6	6	
Early Evening Entertainment And Celebrity News Shows Such As Entertainment Tonight	7	7	
Prime Time Comedy/Drama Shows	8	8	
Late Evening News Programs	9	9	
Late Night Talk Or Variety Shows	0	0	
All-News Cable Channels Such As CNN, Fox News Network, Headline News, MSNBC	1	1	
Premium Cable Movie Channels Such As HBO, Showtime, Etc	2	2	
Non-Premium Cable Movie Channels Such As AMC		3	
Cable Family/Life Programs		4	
Sports Events/Sports Programs	5	5	
None Of The Above (IF CIRCLED IN A, NO NEED TO FOLLOW-UP WITH B)	y		
Figure for all of the first and the first an			

26. Finally, for classification purposes only: in <u>total</u>, including yourself, how many people currently live <u>in your household</u>?

#	00-00
(RECORD EXACT NUMBER)	

...00

27. What was the last grade of <u>education</u> you completed? (DON'T READ LIST.)

Grade School Or Less	1
High School Graduate	2
Technical, trade, or Business School	3
Attended College But Did Not Complete Degree	4
College Undergraduate Degree (BS/BA/etc.)	5
Post-Graduate College Degree (MS/MBA/etc.)	6
(DON'T READ BUT CIRCLE IF:) Refused	V

## **CLOSING COMMENTS**

That completes the survey. Thank you so much for your help with the survey. We are required by law to report to you the OMB (Office of Management and Budget) Control Number for this public information request. That number is 1545-1432. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you can write to the IRS. Would you like the address?

(IF YES, ADDRESS IS...) IRS Tax Products Coordinating Committee

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