

# Taxes Survey

Prepared For:

NEFE

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**KEY FINDINGS**

 **Tax Filing**

Nearly three quarters (74%) of U.S. adults have filed their taxes already this year. Among those who have, about two in five (42%) are happy with the outcome of their filing, a third (33%) are unhappy and a quarter (25%) are neither happy nor unhappy.

**Federal Tax Filing**

Among those who have filed their taxes already this year, nearly all (94%) have completed filing their federal taxes. Among those who have, nearly three quarters (73%) received a federal refund, roughly one in five (21%) owed and 5% broke even.

* Women (77%) are more likely than men (69%) to have received a federal refund, whereas men (25%) are more likely than women (17%) to have owed on their federal taxes.

About a quarter (26%) of those who filed their federal taxes already received about the same amount of money they typically get as a federal tax refund, while another quarter (24%) received less money than they typically get as a federal tax refund. Just 15% received more money than they typically get as a federal tax refund. Only 5% received money this year but typically paid money in the past, while only 4% received money this year, but typically broke even (neither paid nor received money) in the past.

* Women (28%) are more likely than men (19%) to have received less money than they typically get as a federal tax refund.

Less than one in 10 (7%) of those who filed their federal taxes already had to pay more money on their federal tax filing this year than they typically have in the past; 5% had to pay money on their federal tax filing this year, but never had to in the past; while another 5% had to pay about the same amount of money on their federal tax filing this year as compared to the past. Only 2% had to pay less money on their federal tax filing than they typically have in the past, and another 2% had to pay money on their federal tax filing this year and typically broke even (neither paid nor received money) in the past.

**Paying For Taxes Owed**

Over half of U.S. adults who have already filed their federal and/or state taxes this year (53%) owe money. Among those that owe, 50% plan to pay for it from savings. Less than one in five plan to use credit cards (18%) or scheduled tax payments from last year (16%). One in 10 plan to borrow from family or friends (10%) or take out some other type of loan (10%).

**Tax Refund Spending**

Roughly four in five U.S. adults who have already filed their federal and/or state taxes this year (81%) are getting a refund. Nearly half of them (47%) plan to save the money, while over a third (38%) plan to pay down/off debt. Over one in 10 plan to travel (15%), make home improvements (15%), buy new clothes/shoes (13%) or make a car repair (12%).

* Men (14%) are significantly more likely than women (8%) to say they would put the money in an investment account.

**FULL METHODOLOGY**

This survey was conducted online within the U.S. by The Harris Poll on behalf of NEFE between March 14-18, 2019, among 2,015 adults ages 18, among whom 1,468 have filed taxes already this year.

Results were weighted for age within gender, region, race/ethnicity, income, and education where necessary to align them with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents’ propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Poll avoids the words “margin of error” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in online surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in our panel, no estimates of theoretical sampling error can be calculated.

**A Note about Reading the Report**

The percentage of respondents has been included for each item.

* + An asterisk (\*) signifies a value of less than one-half percent.
	+ A dash represents a value of zero.
	+ Percentages may not always add up to 100% because of computer rounding or the acceptance of multiple responses.

**About The Harris Poll**

The Harris Poll is one of the longest running surveys in the U.S. tracking public opinion, motivations and social sentiment since 1963 that is now part of Harris Insights & Analytics, a global consulting and market research firm that delivers social intelligence for transformational times. We work with clients in three primary areas; building twenty-first-century corporate reputation, crafting brand strategy and performance tracking, and earning organic media through public relations research. Our mission is to provide insights and advisory to help leaders make the best decisions possible. To learn more, please visit [www.theharrispoll.com](http://www.theharrispoll.com).

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