

NORC AmeriSpeak Omnibus Survey:

2021 TAX SEASON AN UNCERTAIN TIME FOR MANY U.S. TAXPAYERS

Interview Dates: February 25-March 1, 2021

Nationally representative sample of 1,076 English-speaking adults age 18 and over, conducted using the AmeriSpeak® Panel, the probability-based panel of NORC at the University of Chicago.

Of the 1,076 respondents, 57 completed the survey by phone and 1,019 via the web.

The self-funded poll was conducted during a monthly Omnibus survey. It included 1,003 interviews with a nationally representative sample (margin of error +/- 4.09 percent) of adult Americans age 18+ using the AmeriSpeak Panel. AmeriSpeak® is NORC's probability-based panel designed to be representative of the U.S. household population.

During the initial recruitment phase of the panel, randomly selected U.S. households were sampled with a known, non-zero probability of selection from the NORC National Sample Frame and then contacted by U.S. mail, email, telephone, and field interviewers (face-to-face). The panel provides sample coverage of approximately 97 percent of the U.S. household population. Those excluded from the sample include people with P.O. Box only addresses, some addresses not listed in the USPS Delivery Sequence File, and some newly constructed dwellings.

NOTE: *All results show percentages among respondents, unless otherwise labeled.*

Survey

SOF1. How much do you agree or disagree with the following statement: Because of my household's financial situation this year, my taxes are going to be more complicated to file than usual.

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1067)
Strongly agree	8
Somewhat agree	18
Neither agree nor disagree	35
Somewhat disagree	15
Strongly disagree	23

Excluded Missing (Skipped/Refused) N=9

SOF2. When you file your 2020 income taxes, do you expect to get a refund or do you expect that you will have to pay additional taxes to the IRS?

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1064)
I expect to receive a refund	47
I expect to owe the IRS	21
Don't know	32

Excluded Missing (Skipped/Refused) N=12

SOF3. When you file your 2020 income taxes, do you think you will [receive/pay] more or less than you did in previous years?

AmeriSpeak 2/25/2021 – 3/1/2021	Expect to Receive Refund/Owe the IRS (N=749)
More	28
About the same	44
Less	22
Don't know	6

Excluded Missing (Skipped/Refused) N=1

SOF4A. What do you plan to do with your tax refund this year? (Mark all that apply)

AmeriSpeak 2/25/2021 – 3/1/2021	Expect to Receive Refund (N=513)
Use it to pay down debt	32
Use it for everyday bills or expenses	35
Invest it in the stock market	7
Save it in an account	46
Spend it on a major purchase	13
Spend it on something fun	13
Something else	6

SOF4B. Where will you get the money to pay your tax bill this year? (Mark all that apply)

AmeriSpeak 2/25/2021 – 3/1/2021	Expect to Owe the IRS (N=237)
Money I saved up throughout the year	69
Use a credit card	10
Take out a loan from a bank	5
Take out a loan from a payday lender	2
Borrow the money from a friend or family member	1
Sell something for the money	4
I don't know where I will get the money to pay	15

SOF5A. [People don't have to pay taxes on unemployment payments.] Do you think the following statements are true or false?

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1065)
True	22
False	76
Don't know	1

Excluded Missing (Skipped/Refused) N=11

SOF5B. [People don't have to pay taxes if they didn't earn any income.] Do you think the following statements are true or false?

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1062)
True	72
False	28

Excluded Missing (Skipped/Refused) N=14

SOF5D. [Income from a “side hustle” job is not subject to income taxes.] Do you think the following statements are true or false?

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1055)
True	15
False	84
Don't know	2

Excluded Missing (Skipped/Refused) N=21

SOF5E. [People don't have to pay taxes on what they received in their stimulus checks.] Do you think the following statements are true or false?

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1060)
True	72
False	27
Don't know	1

Excluded Missing (Skipped/Refused) N=16

Demographics

GENDER. Respondent Gender

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
Male	48
Female	52

AGE4. Age - 4 Categories

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
18-29	21
30-44	25
45-59	24
60+	30

RACETHNICITY. Combined Race/Ethnicity

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
White, non-Hispanic	63
Black, non-Hispanic	12
Other, non-Hispanic	1
Hispanic	17
2+, non-Hispanic	3
Asian, non-Hispanic	5

EDUC5. 5-Level Education

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
Less than high school	10
High school graduate or equivalent	28
Vocational/tech school/some college/associates	28
Bachelor's degree	19
Post graduate study/professional degree	15

MARITAL. Marital Status

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
Married	50
Widowed	4
Divorced	8
Separated	6
Never married	27
Living with partner	6

INCOME4. 4-Level Household Income

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
Less than \$30,000	25
\$30,000 to under \$60,000	27

INCOME4. 4-Level Household Income

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
\$60,000 to under \$100,000	26
\$100,000 or more	22

EMPLOY. Current Employment Status

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
Working - as a paid employee	46
Working - self-employed	8
Not working - on temporary layoff from a job	1
Not working - looking for work	9
Not working - retired	19
Not working - disabled	7
Not working - other	10

REGION4. 4-Level Region

AmeriSpeak 2/25/2021 – 3/1/2021	All Adults (N=1076)
Northeast	17
Midwest	21
South	38
West	24