



CYGNAL

Survey of U.S. Taxpayers Who Have Filed **National**

March 23 – 24, 2026 | n=1200

Insights & Analysis

- How filers experienced the 2025 filing process
 - **Filing difficulty was largely unchanged:** 55% said it stayed the same vs. last year, 29% found it easier, and 15% found it harder.
 - **Confidence is high:** 89% are somewhat or very confident their return was filed correctly.
 - **AI use is growing:** 19% of filers used AI to help prepare their return, with 11% doing so for the first time this year.
 - **Most received a refund:** 57% received a federal tax refund this year, while 13% owed additional taxes and 14% broke even.
 - 39% of those receiving a tax refund say it was larger than last year, and 34% about the same. Just 24% received a smaller refund.
- OB3 impact on tax outcomes and fairness perceptions
 - Awareness of OB3 changes is present but shallow. 56% heard at least some about the legislation; only 17% heard nothing at all.
 - Tax impact perceptions are split: 27% say the changes favored them, 24% say they were harmed, and 38% noticed no difference.
 - Filers who earn money from tips, overtime, or both (33% overall) were far more likely to notice a difference in their taxes (71%) compared to non-tipped/OT earners (40%).
 - Tipped/OT earners are evenly split between saying the changes favored them (36%) or harmed them (35%).
 - Tip-only earners are the clearest OB3 beneficiaries: 48% say the changes favored them, the highest of any subgroup.

Insights & Analysis

- Which groups report different outcomes
 - Age drives fairness perceptions more than party. Filers 65+ skew positive (34% favored, 12% harmed); those 18-44 skew negative (32% harmed, 28% favored).
 - Financial stress is widespread and gendered: 43% of women describe their finances as "just getting by" or "struggling," compared to 27% of men.
 - Middle-aged filers (45–54) report the highest combined financial distress: 44% say they are just getting by or struggling, compared to 37% of the 18–44 group and 29% of filers 55+. This cohort is sandwiched between peak earning years and peak expense years (college tuition, aging parents, mortgage costs), and the data suggests they feel it acutely.
 - 44% of refund recipients plan to use the money for debt paydown or basic household expenses, not saving or investing.
- Debt and deficit concern — and what tradeoffs taxpayers accept
 - The debt is already perceived as a crisis: 66% of filers call it serious or very serious, nearly identical across Republicans (69%), Independents (66%), and Democrats (65%).
 - 54% prefer deficit reduction primarily through spending cuts vs 26% primarily through tax increases. Notably, 45% of Democrats also choose spending cuts over tax increases when forced to pick one.
 - 50% accept some tax increase to fund Social Security and Medicare, including 46% of Republicans. The program-specific frame unlocks cross-partisan tax receptivity that general deficit framing cannot.

Insights & Analysis

- Which tax ideas unite taxpayers — and which divide them
 - Taxing millionaires (42%) and large corporations (40%) are the only tax increase options with genuine bipartisan support, drawing roughly equal backing from Republicans and Democrats. Taxing small business is the least popular of all options (9%).
 - Tariffs divide sharply by party: 31% of Republicans would support tariff revenue for deficit reduction vs. only 11% of Democrats.
 - Senior deductions (20%) and the standard deduction (19%) are the most popular OB3 provisions across all groups — both function as unifying policy anchors.
 - 66% of taxpayers support extending OB3 provisions through some fiscal offset. Only 8% want the provisions to expire.
 - The combination approach (spending cuts plus tax increases) draws consistent 19-22% support across Republicans, Independents, and Democrats — the only extension strategy with true cross-partisan appeal.
- Deeper look: OB3 awareness and impact perceptions by party and age
 - 33% of Republicans heard a ton or a good amount about OB3 compared to 29% of Democrats and 24% of Independents. 35% of Republicans say the changes favored them, vs 22% of Democrats and 23% of Independents.
 - Awareness also skews younger: 34% of filers 18–44 heard a ton or a good amount about the changes, nearly double the rate among filers 65+ (20%). This is counterintuitive—younger filers are not typically the most politically engaged cohort, but OB3's tip and overtime provisions map directly onto their earning patterns.

Insights & Analysis

- **The Tip and Overtime earner population**

- About one-third of filers (33%) earned income from tips, overtime, or both during tax year 2025. This “Any Tip/OT” group is demographically younger (75% are under 45, vs. 35% of those with no tip/OT income), more male (55% vs. 46%), and slightly more Republican-leaning (40% vs. 36%). These are working-age earners whose paychecks are directly shaped by the OB3 provisions—and their survey responses reflect that proximity.
- Tip/OT earners are dramatically more aware of the tax changes: 41% heard “a ton” or “a good amount” about OB3, compared to just 22% of non-tip/OT filers. Conversely, 23% of the non-tip/OT group heard nothing at all, versus only 6% of tip/OT earners. Awareness correlates directly with having a personal stake in the provisions.
- OB3 impact is felt more intensely—in both directions—among tip/OT earners. 36% say the changes favored them (vs. 23% of non-tip/OT filers), but 35% say they were harmed (vs. 18%). Only 23% of this group noticed no difference, compared to 47% of non-tip/OT filers. The legislation is reaching its intended audience but producing sharply mixed verdicts.
- The filing experience itself is more volatile for tip/OT earners. 35% found this year’s filing easier than last (vs. 25% of non-tip/OT filers), but 23% found it harder (vs. 11%). The “stayed about the same” majority that dominates the non-tip/OT group (63%) shrinks to just 41% among tip/OT earners. New deductions created both relief and confusion simultaneously.
- AI adoption is a defining feature of the tip/OT earner group. 39% used AI to help file (16% repeat users, 23% first-timers), compared to just 9% of non-tip/OT filers. This is not just a generational artifact—AI use among tip/OT earners outpaces the overall 18–44 rate (30%).

Insights & Analysis

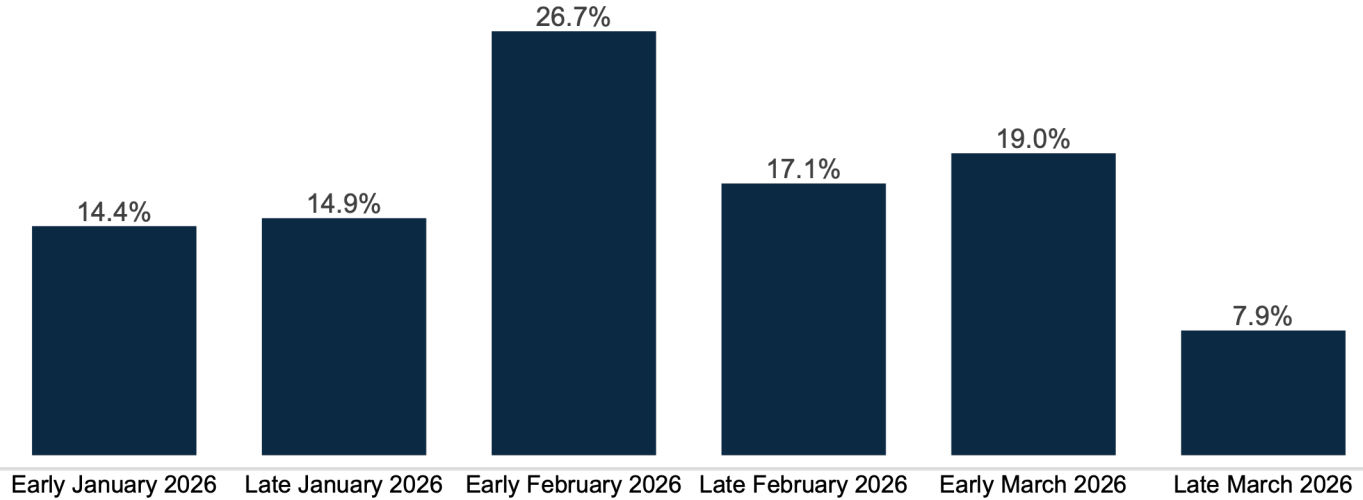
- **Non-tip/OT filers**

- The non-tip/OT group (n=777) is the numeric majority and skews older (32% are 65+, vs. 5% of the tip/OT group), more female (54% vs. 44%), and slightly more Democratic (38% vs. 35%). They are more likely to be retired (data shows a much larger 65+ share) and to rely on the senior deduction.
- This group's filing experience was stable: 63% said the process stayed about the same as last year, and 63% were very confident their return was filed correctly. The OB3 changes largely passed them by—47% noticed no difference in their tax outcome.
- Despite their distance from the tip/OT provisions, non-tip/OT filers hold strong fiscal views. They are significantly more dissatisfied with government spending: 53% are dissatisfied (including 32% very dissatisfied), compared to 28% dissatisfied among tip/OT earners. Only 10% of non-tip/OT filers are very satisfied with how their tax dollars are spent.
- Non-tip/OT filers view the deficit as more urgent: 44% call it a “very serious problem requiring immediate action,” compared to 32% of tip/OT earners. Their preferred response to extending OB3 provisions is cutting government spending (41%, vs. 28% of tip/OT earners), and they are much less open to increased borrowing (5% vs. 14%) or letting provisions expire (4% vs. 14%).
- AI in tax filing: an emerging divide with policy implications
 - Among 18–44 year-olds, 30% used AI this filing season. That rate drops to 15% for the 45–54 cohort and just 6% for filers 55+.
 - 52% of those 55+ **will never use AI to file**, compared to 32% of filers under 45.

Insights & Analysis

- The most common AI use case is answering questions about tax rules and deductions (20% of all filers), followed by deciding which deductions to claim (18%) and reviewing returns for errors (18%). These are advisory functions, not preparation functions—filers are using AI as a second opinion rather than a primary filing tool.
- The future growth runway is substantial: 34% of all filers say they didn't use AI this year but are considering it. Combined with the 19% who already used it, more than half of taxpayers are either using or open to using AI for tax preparation—a signal that tax policy communication strategies will increasingly need to account for AI-mediated information channels.
- Perceived impacts of tax relief on government, businesses, and households
 - Perceptions of the government's fiscal response split along predictable lines. Republicans are the most likely to believe the government “has become more efficient” (19%) or “scaled back spending” (22%). Democrats emphasize “borrowing more” (43%) and “relying on tariffs” (32%). Independents mirror the Democratic view on borrowing (37%) but also show the highest unsure rate (13%), again signaling their distance from confident fiscal narratives.
 - Taxpayers are skeptical about the downstream effects of the tax changes on businesses. 42% say businesses are raising prices more than normal—suggesting that many filers see the tax relief as absorbed by corporate pricing rather than passed to consumers.
 - Perceived household impact centers on work behavior, not savings. The top response (32%) is that people are working more hours than they otherwise would, with 27% saying households will spend more. Taken together, the public reads these changes as encouraging labor and consumption.

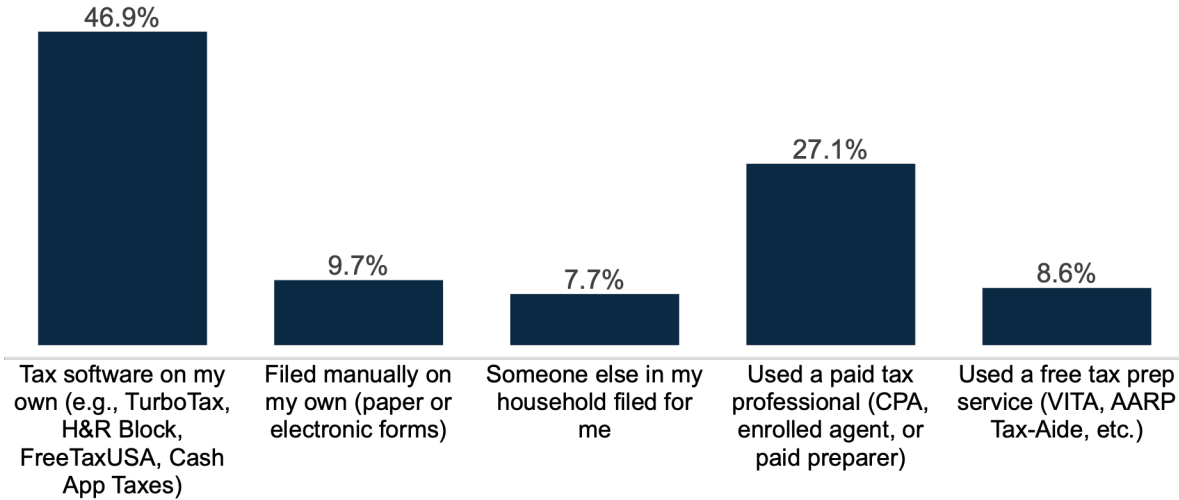
Tax Filing Timing



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Early Filer	73%	81%	68%	80%	54%	62%	77%	79%	72%	85%	73%	67%	77%	65%	77%	73%	75%	71%	74%	74%	70%	79%	82%	58%	77%	66%	76%	69%	81%	69%	81%	71%	61%	75%	71%	73%
Late Filer	27%	19%	32%	20%	46%	38%	23%	21%	28%	15%	27%	33%	23%	35%	23%	27%	25%	29%	26%	26%	30%	21%	18%	42%	23%	34%	24%	31%	19%	31%	19%	29%	39%	25%	29%	27%
Early January 2026	14%	17%	12%	20%	3%	11%	16%	16%	14%	12%	11%	14%	18%	15%	15%	12%	16%	14%	13%	15%	13%	16%	24%	8%	16%	11%	16%	12%	20%	11%	18%	10%	14%	13%	15%	14%
Late January 2026	15%	21%	11%	15%	8%	10%	14%	18%	18%	18%	19%	12%	16%	11%	17%	15%	15%	14%	16%	15%	14%	11%	23%	14%	17%	12%	16%	13%	18%	13%	17%	14%	12%	14%	14%	14%
Early February 2026	27%	27%	28%	29%	22%	23%	29%	29%	24%	37%	27%	24%	26%	23%	28%	28%	28%	27%	27%	26%	25%	35%	22%	21%	27%	26%	26%	28%	29%	26%	30%	27%	20%	31%	25%	27%
Late February 2026	17%	15%	18%	16%	21%	19%	17%	16%	16%	18%	16%	17%	17%	16%	18%	19%	16%	16%	18%	17%	19%	16%	12%	16%	17%	17%	17%	17%	14%	19%	16%	19%	14%	17%	17%	18%
Early March 2026	19%	13%	26%	15%	30%	26%	16%	16%	19%	10%	17%	23%	17%	28%	16%	18%	17%	20%	18%	18%	21%	15%	11%	26%	16%	26%	18%	21%	14%	22%	13%	20%	30%	17%	21%	19%
Late March 2026	8%	6%	5%	5%	17%	12%	7%	5%	8%	5%	10%	10%	5%	7%	7%	9%	8%	9%	7%	8%	8%	6%	7%	15%	8%	8%	6%	10%	5%	9%	6%	9%	9%	8%	8%	8%

When did you file your 2025 federal income tax return?

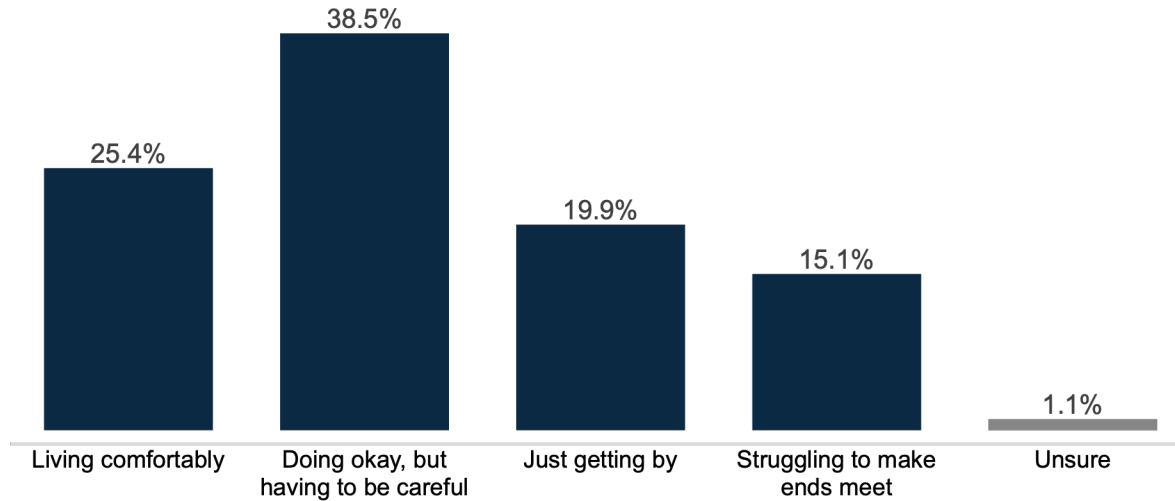
Filing Method



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unempld/Ret	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Self-Prep	64%	71%	55%	66%	57%	56%	69%	65%	67%	61%	60%	66%	66%	60%	66%	66%	64%	62%	70%	64%	65%	59%	67%	71%	65%	63%	70%	61%	65%	65%	61%	65%	62%	64%
Prof-Prep	36%	29%	45%	34%	43%	44%	31%	35%	33%	39%	40%	34%	34%	40%	34%	34%	36%	38%	30%	36%	35%	41%	33%	29%	35%	37%	30%	39%	35%	39%	35%	38%	36%	
Tax software on my own (e.g., TurboTax, H&R Block, FreeTaxUSA, Cash App Taxes)	47%	49%	40%	50%	44%	47%	49%	46%	46%	39%	47%	48%	50%	43%	46%	49%	49%	45%	50%	47%	48%	43%	48%	52%	49%	44%	48%	46%	42%	50%	50%	46%	47%	47%
Filed manually on my own (paper or electronic forms)	10%	11%	9%	9%	8%	7%	10%	10%	12%	12%	8%	10%	8%	11%	10%	10%	8%	10%	10%	10%	10%	8%	12%	11%	9%	11%	12%	9%	12%	8%	7%	10%	10%	9%
Someone else in my household filed for me	8%	11%	6%	7%	4%	2%	10%	9%	9%	11%	4%	7%	8%	6%	9%	8%	7%	10%	7%	7%	8%	8%	7%	7%	9%	10%	6%	10%	6%	4%	9%	6%	8%	
Used a paid tax professional (CPA, enrolled agent, or paid preparer)	27%	20%	37%	25%	35%	37%	20%	26%	26%	27%	31%	27%	25%	34%	25%	25%	25%	32%	22%	26%	29%	29%	20%	23%	27%	28%	21%	31%	22%	30%	33%	27%	31%	27%
Used a free tax prep service (VITA, AARP Tax-Aide, etc.)	9%	9%	8%	9%	8%	7%	11%	9%	7%	11%	9%	7%	9%	6%	9%	9%	11%	7%	9%	10%	6%	12%	12%	7%	9%	8%	10%	8%	13%	5%	5%	8%	7%	9%
Have not filed yet	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Unsure	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

How did you file your 2025 federal income tax return?

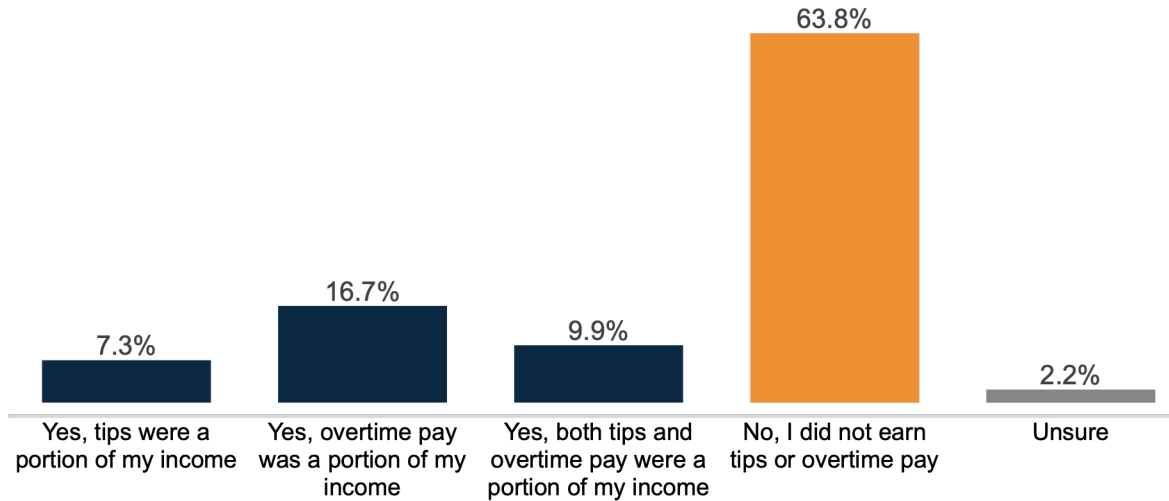
Household Financial Stability



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Living comfortably	25%	17%	20%	30%	37%	43%	23%	14%	26%	14%	19%	30%	28%	23%	22%	28%	30%	31%	21%	24%	27%	23%	22%	28%	24%	27%	24%	27%	28%	25%	12%	27%	51%	20%	30%	26%
Doing okay, but having to be careful	38%	36%	41%	37%	42%	41%	38%	37%	40%	40%	39%	42%	31%	47%	36%	36%	37%	39%	41%	36%	39%	38%	33%	45%	40%	35%	39%	38%	36%	40%	31%	48%	37%	39%	41%	36%
Just getting by	20%	26%	19%	19%	13%	10%	24%	27%	17%	21%	25%	17%	22%	15%	25%	22%	15%	17%	20%	23%	17%	27%	23%	18%	20%	20%	20%	20%	20%	19%	31%	14%	8%	24%	16%	22%
Struggling to make ends meet	15%	20%	20%	12%	8%	6%	14%	21%	17%	21%	17%	11%	18%	14%	16%	13%	16%	12%	17%	17%	16%	10%	20%	10%	15%	16%	15%	15%	15%	15%	25%	10%	4%	15%	14%	16%
Unsure	1%	2%	0%	2%	1%	0%	2%	1%	0%	4%	0%	0%	1%	1%	1%	0%	2%	0%	2%	0%	1%	2%	2%	0%	1%	0%	1%	0%	1%	1%	1%	0%	3%	0%	0%	

Which of the following best describes your household's day-to-day financial situation right now?

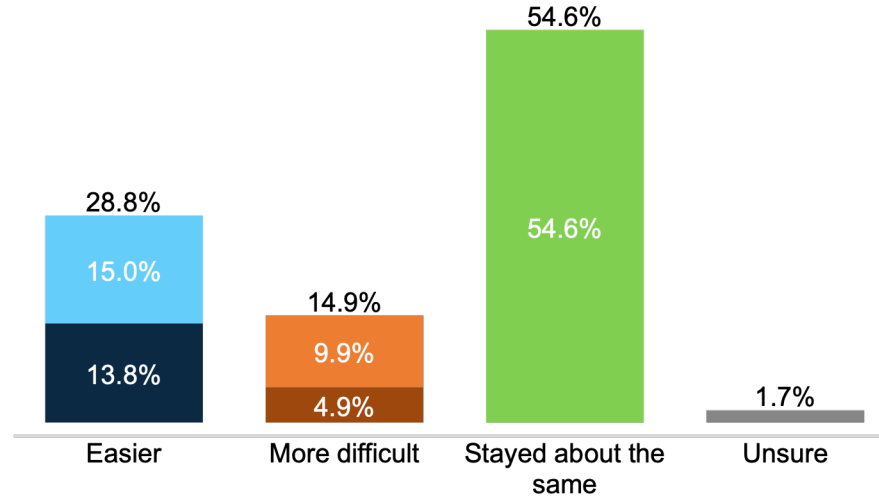
Tip and Overtime Income



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unempld/Ret	Self-Prep	Prof-Prep	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Yes, tips were a portion of my income	7%	8%	3%	12%	2%	8%	9%	6%	7%	8%	6%	5%	11%	6%	8%	8%	7%	9%	6%	6%	6%	9%	13%	7%	9%	3%	8%	7%	8%	8%	6%	5%	9%	6%
Yes, overtime pay was a portion of my income	17%	19%	5%	26%	8%	13%	25%	15%	13%	17%	17%	17%	15%	14%	18%	13%	22%	18%	17%	16%	13%	24%	24%	6%	22%	7%	19%	13%	14%	19%	17%	19%	18%	16%
Yes, both tips and overtime pay were a portion of my income	10%	12%	0%	17%	2%	9%	13%	8%	9%	9%	13%	10%	9%	8%	11%	8%	12%	10%	11%	9%	6%	16%	16%	12%	13%	4%	11%	9%	11%	10%	8%	13%	10%	10%
No, I did not earn tips or overtime pay	64%	56%	90%	43%	88%	70%	52%	66%	69%	63%	61%	66%	61%	71%	61%	69%	58%	62%	65%	66%	73%	49%	43%	75%	54%	82%	61%	70%	64%	62%	67%	58%	62%	66%
Unsure	2%	4%	2%	2%	0%	0%	2%	4%	2%	3%	3%	1%	3%	2%	3%	2%	2%	2%	2%	2%	2%	3%	4%	0%	2%	3%	3%	2%	3%	2%	1%	4%	2%	2%

During tax year 2025, did you or your spouse, if you filed jointly, earn income from tips or overtime pay as part of your job?

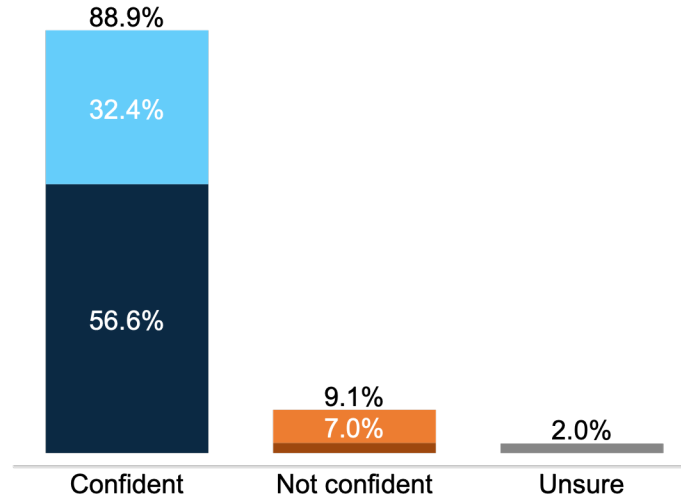
Tax Process Difficulty



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Easier Total	29%	28%	28%	37%	17%	29%	31%	28%	28%	27%	29%	27%	34%	25%	32%	26%	28%	34%	22%	27%	25%	38%	38%	13%	33%	21%	30%	27%	35%	25%	29%	29%	28%	26%	32%	27%
More difficult Total	15%	18%	11%	16%	10%	12%	15%	14%	18%	15%	19%	14%	15%	12%	15%	12%	19%	14%	15%	17%	13%	16%	20%	16%	16%	13%	15%	14%	23%	11%	17%	14%	11%	17%	15%	15%
Much easier	14%	16%	12%	17%	7%	13%	14%	15%	13%	10%	15%	14%	16%	12%	15%	13%	14%	18%	9%	12%	12%	22%	15%	4%	16%	10%	15%	11%	15%	12%	14%	12%	17%	9%	16%	12%
Somewhat easier	15%	13%	16%	20%	11%	16%	17%	13%	15%	17%	14%	13%	17%	14%	17%	13%	14%	17%	13%	15%	13%	17%	23%	9%	17%	11%	14%	16%	20%	13%	15%	17%	12%	17%	16%	15%
Stayed about the same	55%	51%	60%	46%	71%	58%	52%	55%	53%	56%	50%	58%	50%	62%	50%	59%	52%	51%	60%	55%	60%	45%	39%	69%	50%	63%	53%	58%	41%	63%	51%	56%	60%	54%	52%	56%
Somewhat more difficult	10%	10%	9%	11%	8%	11%	10%	8%	12%	9%	14%	9%	10%	9%	10%	9%	12%	9%	11%	10%	9%	11%	13%	10%	10%	10%	10%	9%	15%	8%	11%	10%	8%	13%	10%	9%
Much more difficult	5%	8%	3%	5%	2%	2%	5%	6%	6%	7%	5%	5%	4%	2%	6%	3%	7%	4%	4%	7%	4%	5%	7%	6%	6%	3%	5%	5%	8%	3%	7%	4%	3%	4%	5%	6%
Unsure	2%	3%	1%	1%	2%	1%	2%	3%	1%	2%	2%	1%	2%	1%	2%	2%	1%	1%	4%	1%	2%	0%	3%	2%	1%	2%	2%	1%	1%	2%	3%	1%	1%	3%	1%	1%

Compared to last year, was filing your federal taxes this season easier or more difficult?

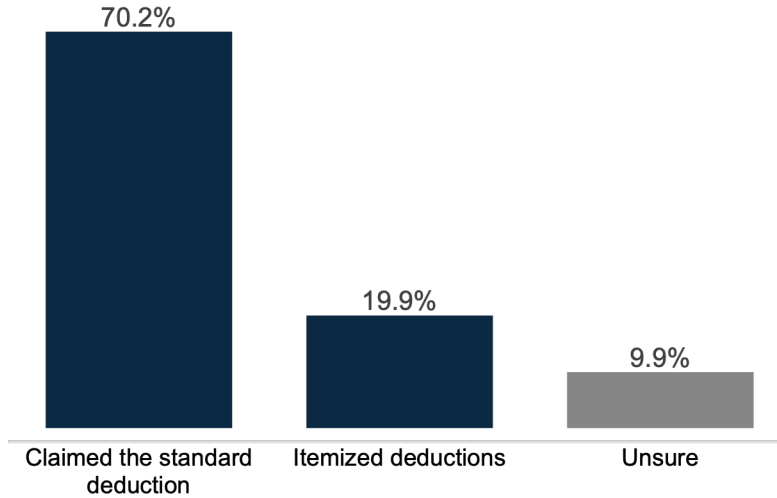
Tax Process Confidence



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Confident Total	89%	85%	93%	86%	98%	97%	85%	85%	93%	86%	85%	91%	88%	91%	88%	90%	88%	92%	86%	90%	93%	84%	82%	83%	90%	88%	89%	89%	83%	93%	85%	90%	95%	82%	93%	90%
Not confident Total	9%	12%	4%	12%	2%	3%	14%	11%	7%	10%	14%	8%	8%	8%	9%	10%	8%	12%	9%	5%	13%	14%	17%	9%	9%	8%	10%	15%	6%	12%	8%	5%	14%	7%	8%	
Very confident	57%	50%	66%	51%	71%	60%	57%	52%	61%	55%	52%	59%	56%	56%	57%	56%	57%	61%	51%	56%	63%	52%	47%	34%	55%	60%	55%	60%	47%	63%	52%	58%	63%	43%	62%	57%
Somewhat confident	32%	35%	27%	36%	27%	36%	28%	33%	32%	31%	32%	33%	32%	35%	31%	34%	31%	30%	34%	34%	30%	31%	36%	48%	35%	28%	34%	29%	36%	30%	33%	32%	33%	39%	30%	33%
Not very confident	7%	9%	2%	10%	2%	3%	11%	8%	4%	9%	9%	6%	6%	6%	7%	6%	8%	6%	10%	7%	4%	11%	10%	12%	8%	6%	6%	8%	12%	4%	9%	6%	4%	11%	6%	6%
Not at all confident	2%	3%	2%	2%	0%	1%	2%	3%	2%	1%	5%	2%	2%	1%	3%	3%	1%	2%	2%	2%	1%	2%	4%	6%	2%	3%	2%	3%	2%	3%	2%	1%	3%	1%	3%	
Unsure	2%	3%	3%	2%	0%	0%	1%	4%	0%	4%	1%	1%	3%	1%	2%	1%	3%	1%	2%	2%	1%	3%	4%	0%	1%	3%	3%	1%	2%	1%	3%	2%	0%	4%	1%	1%

How confident are you that your tax return was filed correctly and that you received all tax advantages you qualified for?

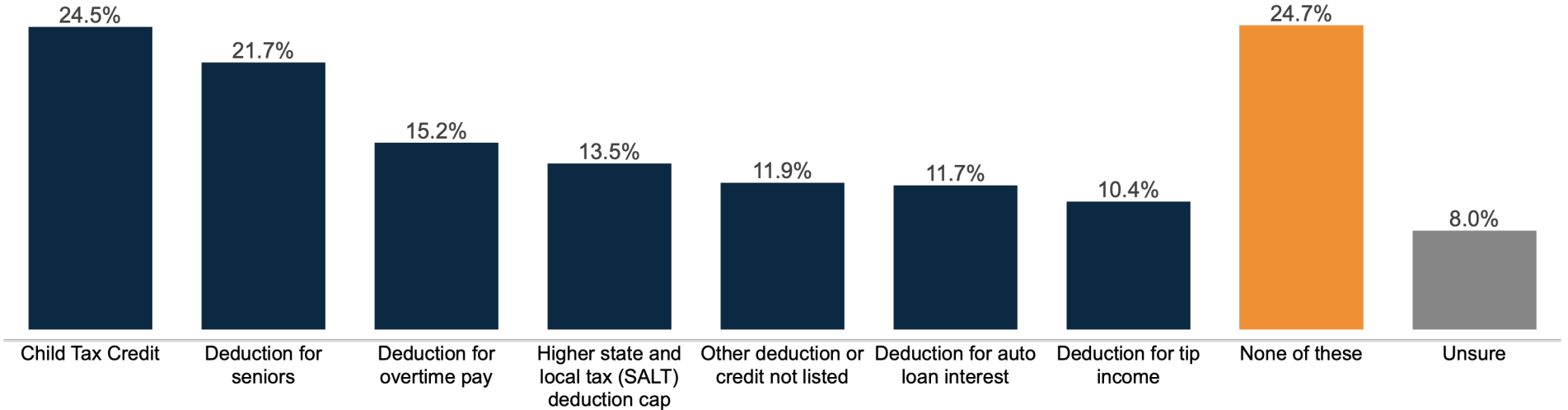
Deduction Method Used



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unempld/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Claimed the standard deduction	70%	70%	70%	68%	74%	69%	72%	69%	73%	69%	76%	71%	67%	70%	71%	72%	67%	71%	68%	73%	74%	66%	63%	66%	70%	71%	74%	63%	69%	72%	73%	70%	67%	67%	71%	72%
Itemized deductions	20%	13%	21%	24%	23%	27%	21%	14%	19%	16%	13%	23%	20%	18%	19%	21%	22%	22%	19%	19%	18%	21%	23%	28%	22%	16%	17%	25%	23%	19%	14%	22%	27%	18%	22%	20%
Unsure	10%	16%	10%	8%	3%	4%	7%	17%	7%	14%	12%	6%	12%	12%	10%	7%	11%	7%	13%	8%	8%	13%	14%	6%	8%	12%	9%	12%	8%	9%	13%	8%	6%	15%	7%	8%

When filing your tax return this year, did you claim the standard deduction or itemize your deductions?

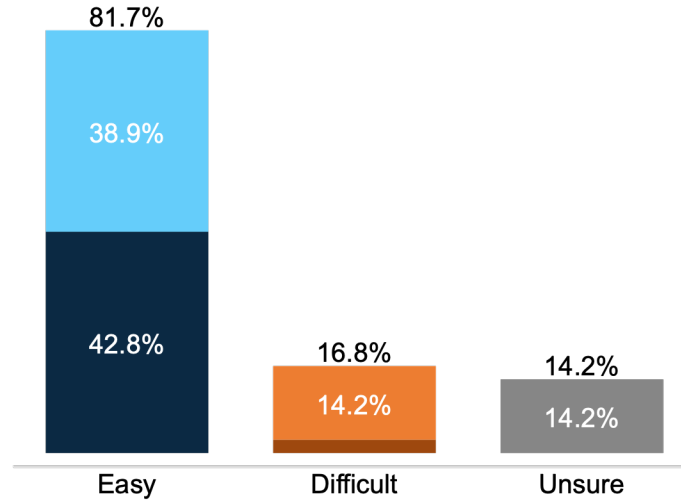
Deductions and Credits Claimed



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Child Tax Credit	25%	38%	8%	31%	7%	20%	23%	28%	27%	25%	26%	24%	25%	22%	25%	28%	24%	25%	26%	23%	21%	32%	29%	20%	31%	13%	26%	22%	36%	19%	25%	25%	25%	26%	26%	24%
Deduction for seniors	22%	7%	34%	13%	51%	36%	19%	15%	19%	17%	17%	25%	19%	26%	18%	25%	21%	25%	20%	21%	28%	11%	13%	17%	15%	35%	20%	24%	17%	25%	17%	23%	28%	17%	23%	25%
Deduction for overtime pay	15%	17%	3%	26%	6%	15%	21%	11%	14%	19%	13%	15%	15%	15%	14%	14%	18%	18%	11%	16%	12%	20%	26%	6%	20%	5%	17%	12%	37%	4%	12%	17%	17%	15%	19%	14%
Higher state and local tax (SALT) deduction cap	13%	13%	4%	21%	12%	21%	14%	10%	10%	13%	12%	12%	17%	16%	11%	12%	17%	15%	14%	13%	10%	18%	24%	13%	17%	7%	14%	13%	24%	8%	10%	14%	20%	14%	14%	14%
Other deduction or credit not listed	12%	10%	10%	12%	17%	16%	12%	9%	12%	11%	13%	12%	12%	10%	12%	13%	14%	12%	12%	13%	13%	8%	13%	14%	12%	12%	12%	11%	12%	12%	9%	13%	16%	10%	14%	13%
Deduction for auto loan interest	12%	6%	4%	24%	9%	19%	17%	4%	8%	10%	11%	10%	17%	10%	10%	10%	17%	13%	9%	13%	9%	19%	14%	8%	14%	7%	11%	14%	22%	7%	9%	13%	15%	9%	14%	13%
Deduction for tip income	10%	14%	1%	16%	2%	9%	13%	10%	9%	10%	8%	10%	13%	8%	10%	10%	13%	9%	9%	11%	7%	15%	17%	10%	12%	7%	11%	10%	25%	3%	11%	11%	8%	11%	9%	10%
None of these	25%	25%	33%	18%	27%	19%	25%	28%	27%	23%	24%	26%	24%	24%	28%	25%	20%	24%	23%	27%	28%	20%	17%	32%	22%	30%	28%	19%	7%	33%	31%	21%	19%	23%	22%	25%
Unsure	8%	8%	13%	7%	5%	5%	7%	11%	6%	13%	6%	7%	8%	8%	10%	6%	7%	6%	11%	6%	8%	8%	9%	7%	6%	11%	6%	11%	4%	9%	10%	7%	6%	12%	6%	6%

Which of the following deductions or credits did you and/or your spouse claim on your 2025 federal tax return, if any? Select all that apply.

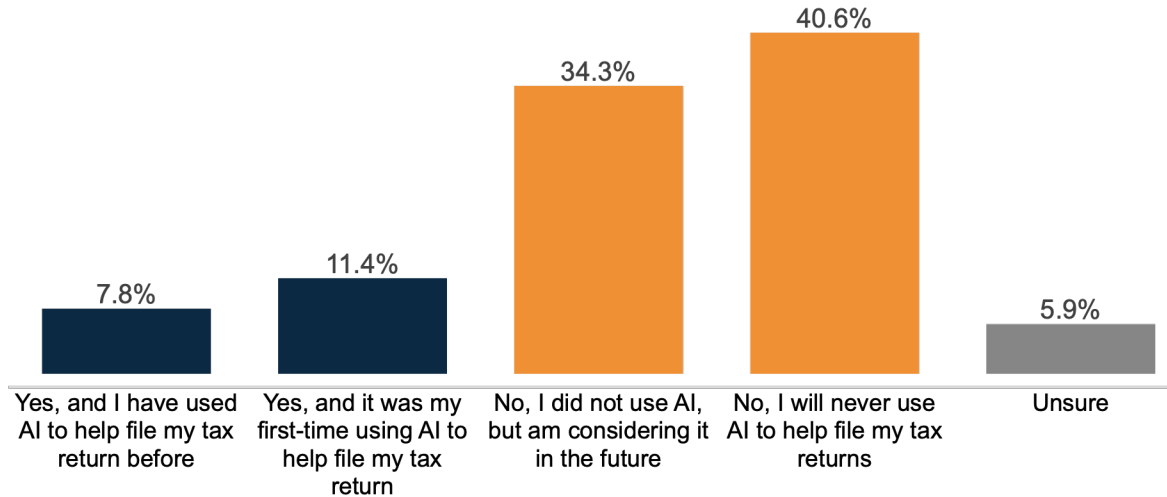
Deductions and Credits Difficulty



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Easy Total	82%	76%	86%	80%	92%	89%	78%	79%	80%	78%	82%	84%	80%	84%	80%	82%	87%	78%	79%	86%	79%	74%	72%	80%	85%	84%	78%	76%	87%	76%	84%	86%	77%	84%	82%	
Difficult Total	17%	22%	12%	18%	8%	9%	20%	19%	18%	20%	18%	15%	18%	14%	18%	16%	18%	20%	19%	12%	19%	26%	28%	18%	14%	16%	18%	23%	11%	22%	15%	12%	22%	15%	16%	
Very easy	43%	39%	46%	38%	58%	50%	39%	40%	43%	35%	39%	46%	44%	36%	47%	45%	41%	48%	38%	40%	50%	33%	32%	34%	40%	50%	42%	44%	35%	50%	38%	42%	51%	31%	49%	42%
Somewhat easy	39%	38%	40%	43%	33%	39%	39%	39%	37%	43%	43%	38%	36%	49%	32%	37%	41%	38%	40%	40%	36%	46%	42%	38%	40%	35%	42%	34%	41%	38%	38%	42%	35%	46%	35%	40%
Somewhat difficult	14%	18%	12%	16%	7%	8%	17%	15%	17%	14%	13%	14%	15%	13%	16%	13%	14%	10%	18%	16%	11%	15%	21%	25%	15%	12%	14%	15%	20%	9%	18%	12%	12%	20%	12%	14%
Very difficult	2%	4%	0%	3%	1%	1%	3%	4%	1%	6%	4%	1%	2%	1%	2%	3%	4%	2%	3%	3%	2%	4%	5%	3%	3%	2%	2%	3%	3%	2%	4%	3%	1%	2%	3%	2%
Unsure	1%	2%	2%	2%	1%	1%	2%	2%	1%	2%	0%	1%	2%	1%	2%	2%	0%	1%	2%	2%	2%	1%	0%	2%	1%	0%	4%	1%	2%	2%	1%	2%	1%	1%	1%	1%

How easy or difficult was it to claim these deductions or credits on your tax return?

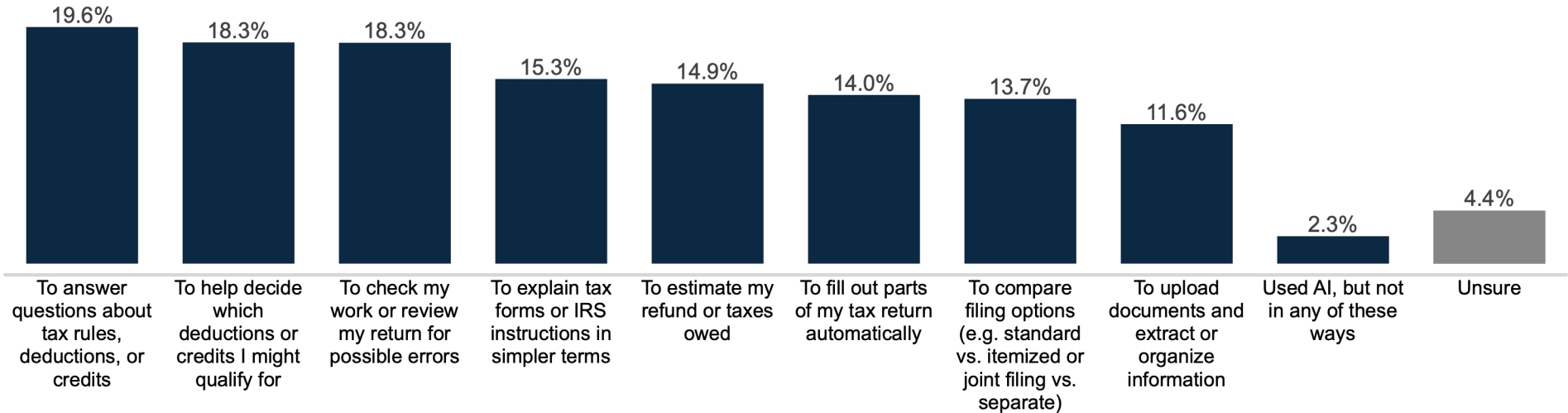
AI Use in Filing



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unempld/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24	
Yes Total	19%	21%	4%	33%	7%	23%	23%	16%	13%	14%	20%	16%	27%	17%	21%	15%	22%	23%	15%	19%	15%	20%	38%	24%	25%	9%	21%	16%	39%	9%	19%	18%	20%	19%	19%	
No Total	75%	75%	85%	63%	86%	72%	72%	76%	84%	79%	73%	78%	67%	75%	77%	73%	71%	80%	77%	80%	74%	55%	74%	71%	83%	74%	77%	58%	85%	75%	75%	75%	75%	76%	76%	
Yes, and I have used AI to help file my tax return before	8%	8%	2%	14%	3%	11%	8%	5%	6%	7%	5%	6%	12%	8%	9%	5%	9%	11%	6%	7%	7%	6%	15%	12%	10%	4%	9%	5%	16%	4%	5%	10%	9%	6%	9%	7%
Yes, and it was my first-time using AI to help file my tax return	11%	13%	2%	19%	4%	11%	15%	11%	7%	7%	16%	10%	15%	9%	12%	10%	14%	12%	9%	13%	8%	14%	24%	11%	15%	5%	12%	10%	23%	5%	14%	9%	11%	13%	11%	12%
No, I did not use AI, but am considering it in the future	34%	34%	29%	36%	38%	40%	34%	30%	37%	32%	30%	37%	32%	35%	29%	35%	41%	33%	39%	34%	33%	43%	23%	38%	36%	31%	36%	32%	35%	34%	30%	38%	37%	37%	36%	35%
No, I will never use AI to help file my tax returns	41%	41%	56%	27%	48%	33%	38%	46%	46%	47%	43%	41%	35%	40%	45%	43%	32%	38%	41%	43%	46%	31%	32%	35%	35%	51%	38%	44%	22%	50%	45%	38%	38%	38%	39%	42%
Unsure	6%	4%	11%	4%	7%	5%	5%	8%	3%	7%	7%	5%	6%	8%	5%	7%	5%	6%	6%	4%	6%	6%	7%	3%	4%	8%	5%	8%	3%	6%	6%	6%	5%	7%	5%	4%

Did you use AI in preparing your tax return this year?

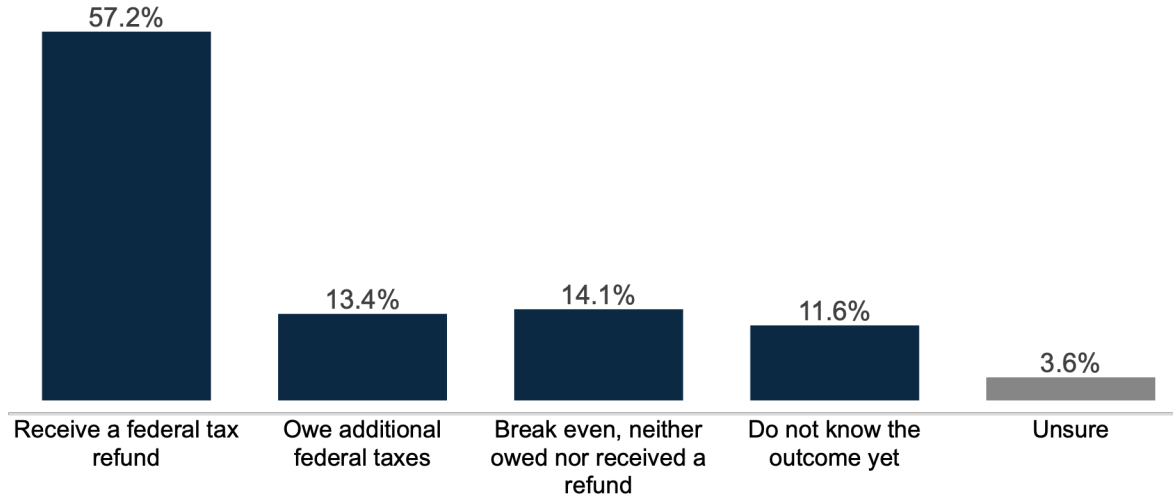
AI Use Type



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
To answer questions about tax rules, deductions, or credits	20%	20%	11%	27%	16%	26%	20%	16%	19%	16%	15%	19%	24%	19%	19%	20%	21%	18%	23%	20%	17%	23%	27%	23%	24%	12%	21%	18%	26%	17%	16%	23%	22%	20%	19%	23%
To help decide which deductions or credits I might qualify for	18%	18%	12%	26%	14%	26%	16%	14%	19%	17%	20%	16%	22%	19%	15%	19%	22%	22%	15%	18%	16%	22%	20%	29%	22%	11%	20%	15%	25%	15%	15%	22%	19%	18%	20%	20%
To check my work or review my return for possible errors	18%	19%	11%	24%	15%	23%	18%	15%	20%	13%	16%	18%	22%	19%	17%	15%	23%	21%	16%	19%	17%	20%	23%	23%	22%	11%	21%	14%	25%	15%	16%	19%	21%	16%	20%	21%
To explain tax forms or IRS instructions in simpler terms	15%	15%	7%	24%	9%	21%	16%	11%	15%	11%	14%	12%	24%	17%	15%	16%	13%	16%	14%	17%	13%	18%	19%	20%	19%	9%	18%	11%	26%	10%	11%	18%	19%	14%	16%	16%
To estimate my refund or taxes owed	15%	15%	8%	22%	9%	17%	17%	11%	16%	12%	11%	14%	21%	18%	12%	12%	19%	17%	12%	16%	14%	17%	17%	15%	18%	9%	16%	14%	22%	11%	12%	16%	19%	14%	17%	15%
To fill out parts of my tax return automatically	14%	16%	4%	20%	11%	19%	14%	11%	13%	9%	9%	13%	20%	9%	10%	22%	18%	16%	11%	14%	14%	13%	14%	16%	17%	8%	15%	11%	21%	10%	12%	16%	15%	14%	18%	14%
To compare filing options (e.g. standard vs. itemized or joint filing vs. separate)	14%	14%	5%	22%	8%	20%	14%	9%	14%	13%	9%	13%	16%	10%	13%	16%	16%	18%	12%	12%	11%	13%	22%	25%	17%	7%	14%	12%	23%	9%	11%	14%	19%	13%	16%	13%
To upload documents and extract or organize information	12%	11%	3%	20%	7%	17%	13%	7%	12%	8%	8%	11%	16%	13%	9%	9%	17%	13%	10%	12%	9%	17%	12%	17%	15%	5%	12%	11%	17%	9%	10%	13%	11%	12%	13%	12%
Used AI, but not in any of these ways	2%	2%	4%	2%	2%	1%	3%	3%	2%	2%	1%	4%	1%	2%	3%	1%	3%	2%	2%	3%	3%	2%	1%	0%	2%	3%	2%	2%	2%	3%	2%	1%	5%	3%	3%	2%
Unsure	4%	5%	4%	2%	8%	5%	4%	4%	5%	5%	3%	5%	3%	4%	4%	5%	5%	3%	6%	4%	5%	5%	1%	2%	4%	6%	4%	6%	4%	5%	4%	5%	4%	5%	3%	5%

How did you use or plan to use AI to help prepare your tax return? Select all that apply.

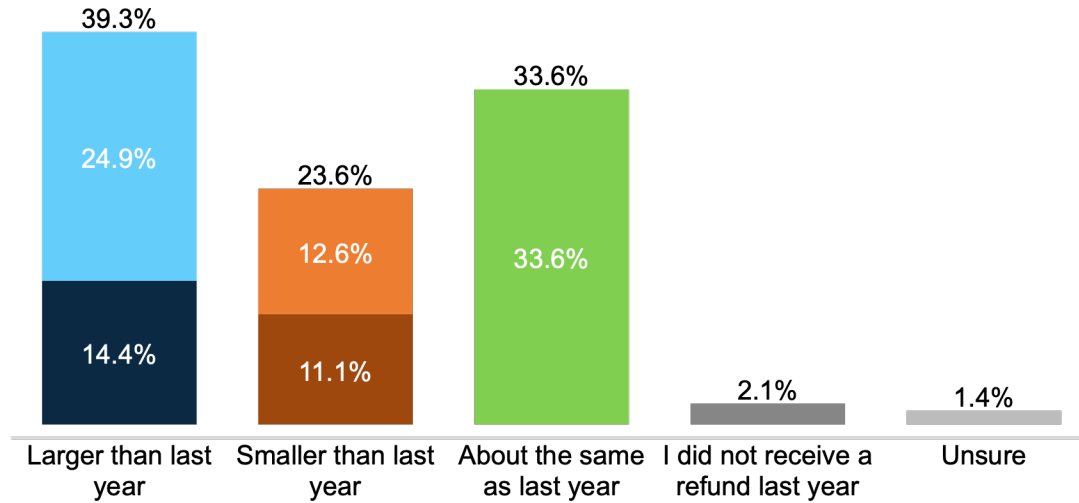
Tax Outcome



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Receive a federal tax refund	57%	58%	54%	54%	64%	56%	60%	55%	63%	61%	55%	60%	51%	52%	60%	60%	56%	60%	57%	55%	61%	54%	49%	51%	58%	56%	59%	54%	55%	60%	53%	61%	59%	53%	60%	57%
Owe additional federal taxes	13%	10%	14%	15%	17%	19%	12%	11%	13%	12%	12%	14%	14%	13%	11%	11%	19%	13%	14%	15%	13%	12%	14%	19%	14%	12%	12%	16%	16%	12%	12%	14%	15%	14%	14%	14%
Break even, neither owed nor received a refund	14%	11%	18%	18%	9%	15%	14%	16%	9%	11%	18%	11%	20%	19%	12%	16%	10%	16%	13%	13%	13%	16%	18%	12%	14%	15%	15%	13%	16%	14%	18%	11%	14%	14%	15%	14%
Do not know the outcome yet	12%	15%	10%	11%	8%	9%	11%	14%	12%	13%	12%	12%	10%	13%	13%	10%	10%	9%	13%	12%	10%	14%	14%	14%	12%	12%	10%	14%	11%	11%	12%	12%	10%	15%	9%	11%
Unsure	4%	5%	3%	3%	2%	1%	4%	4%	4%	3%	3%	3%	5%	3%	4%	3%	4%	2%	4%	4%	3%	4%	5%	3%	3%	5%	4%	3%	3%	3%	5%	3%	2%	5%	2%	3%

After filing your 2025 federal income tax return, did you...

Refund vs. Prior Year

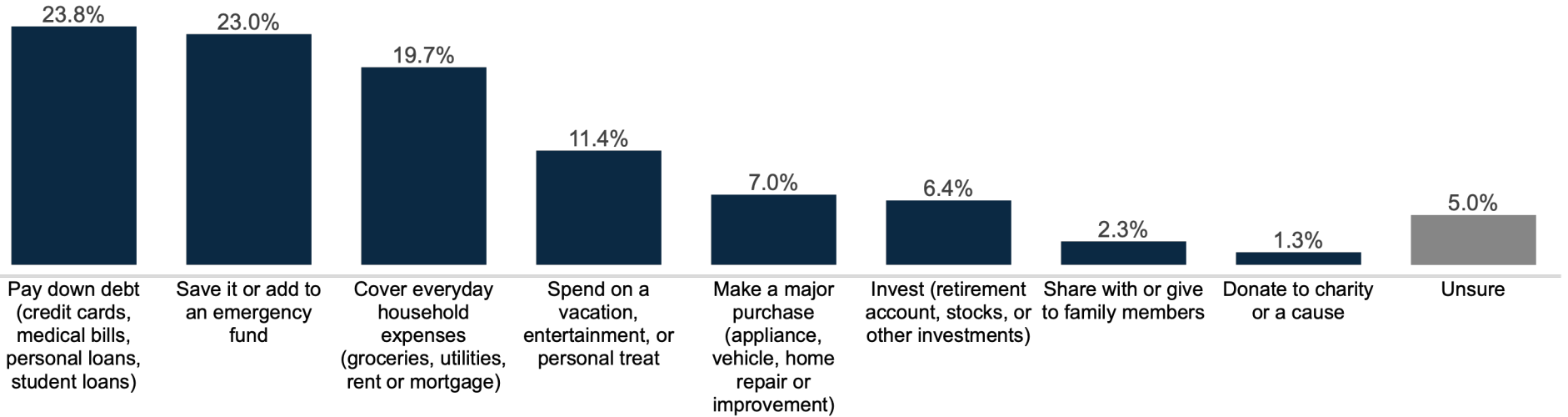


	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemplpyd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Larger than last year	39%	35%	34%	40%	49%	48%	41%	33%	39%	33%	42%	43%	36%	38%	41%	40%	37%	45%	37%	35%	41%	32%	43%	38%	39%	41%	38%	41%	44%	37%	31%	44%	46%	35%	45%	39%
Smaller than last year	24%	30%	14%	23%	22%	23%	22%	28%	19%	30%	20%	20%	28%	18%	23%	24%	29%	20%	26%	26%	22%	35%	22%	11%	24%	23%	24%	24%	23%	28%	22%	19%	24%	21%	25%	
Significantly larger than last year	14%	12%	11%	14%	23%	22%	13%	13%	8%	13%	13%	18%	9%	14%	16%	12%	14%	18%	14%	12%	15%	14%	17%	9%	13%	16%	13%	17%	16%	14%	11%	14%	21%	10%	18%	11%
Somewhat larger than last year	25%	24%	24%	26%	27%	25%	27%	20%	31%	20%	29%	25%	27%	24%	25%	28%	23%	27%	23%	23%	26%	18%	26%	28%	25%	24%	25%	24%	27%	24%	20%	30%	24%	25%	27%	27%
About the same as last year	34%	32%	47%	34%	25%	26%	34%	36%	38%	32%	32%	35%	33%	40%	33%	34%	29%	32%	34%	35%	33%	30%	33%	46%	35%	32%	35%	30%	30%	36%	36%	33%	30%	38%	32%	35%
Somewhat smaller than last year	13%	13%	10%	12%	15%	16%	10%	14%	9%	16%	10%	12%	12%	11%	12%	15%	13%	10%	15%	15%	13%	17%	11%	2%	12%	13%	11%	15%	13%	12%	13%	12%	12%	16%	10%	12%
Significantly smaller than last year	11%	17%	4%	11%	7%	7%	11%	14%	11%	14%	10%	8%	16%	8%	10%	10%	16%	10%	12%	11%	9%	18%	11%	10%	12%	10%	12%	9%	11%	11%	15%	9%	7%	9%	10%	13%
I did not receive a refund last year / this is my first year filing	2%	1%	4%	1%	4%	4%	1%	2%	2%	2%	6%	1%	3%	3%	2%	1%	3%	1%	2%	3%	3%	1%	0%	5%	2%	3%	2%	3%	2%	2%	3%	1%	3%	2%	2%	2%
Unsure	1%	2%	1%	2%	0%	0%	2%	2%	1%	3%	0%	2%	0%	0%	2%	1%	2%	1%	1%	2%	1%	2%	2%	0%	1%	2%	1%	2%	0%	2%	2%	1%	2%	1%	1%	0%

Compared to the refund you received last filing season, was this year's refund...



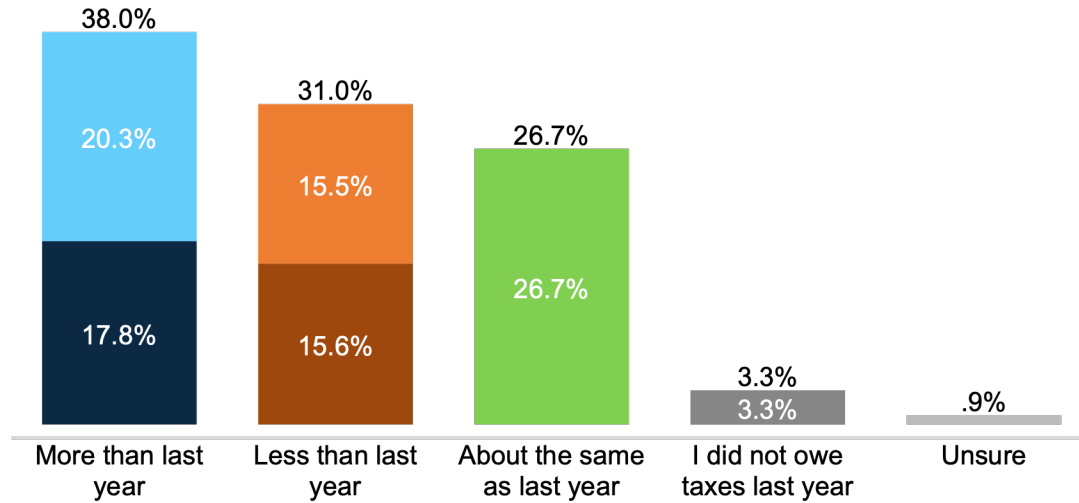
Primary Use of Refund



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Pay down debt (credit cards, medical bills, personal loans, student loans)	24%	25%	21%	24%	24%	18%	29%	24%	24%	32%	23%	21%	23%	24%	29%	21%	18%	24%	30%	21%	23%	28%	18%	27%	25%	22%	22%	28%	21%	25%	22%	28%	18%	26%	26%	24%
Save it or add to an emergency fund	23%	20%	26%	22%	27%	30%	19%	18%	29%	20%	23%	24%	24%	21%	24%	29%	17%	24%	21%	25%	26%	12%	26%	25%	23%	24%	22%	24%	19%	25%	21%	19%	35%	20%	24%	25%
Cover everyday household expenses (groceries, utilities, rent or mortgage)	20%	25%	25%	14%	14%	12%	17%	29%	19%	25%	20%	16%	24%	23%	20%	22%	15%	17%	20%	22%	21%	14%	26%	15%	18%	22%	22%	16%	18%	21%	31%	14%	9%	21%	19%	18%
Spend on a vacation, entertainment, or personal treat	11%	10%	15%	9%	14%	13%	9%	8%	18%	6%	12%	14%	9%	11%	6%	14%	18%	13%	9%	11%	11%	16%	9%	12%	11%	12%	12%	11%	11%	12%	8%	15%	11%	9%	11%	12%
Make a major purchase (appliance, vehicle, home repair or improvement)	7%	7%	7%	9%	4%	7%	7%	8%	5%	6%	9%	7%	6%	6%	7%	5%	10%	10%	5%	6%	6%	12%	8%	0%	7%	7%	8%	5%	12%	5%	7%	8%	6%	6%	7%	7%
Invest (retirement account, stocks, or other investments)	6%	6%	1%	11%	7%	12%	6%	4%	5%	3%	9%	8%	4%	7%	6%	5%	8%	6%	5%	8%	6%	5%	7%	16%	8%	4%	7%	5%	9%	5%	4%	6%	10%	8%	7%	8%
Share with or give to family members	2%	2%	1%	4%	1%	1%	5%	2%	1%	2%	2%	3%	2%	2%	2%	0%	5%	2%	1%	2%	2%	5%	2%	2%	2%	1%	5%	4%	2%	2%	2%	3%	3%	3%	3%	1%
Donate to charity or a cause	1%	2%	0%	3%	0%	2%	1%	1%	1%	0%	0%	2%	2%	0%	1%	1%	3%	1%	1%	1%	1%	3%	0%	3%	2%	1%	2%	0%	3%	0%	1%	1%	3%	1%	1%	1%
Unsure	5%	4%	4%	5%	8%	5%	7%	6%	0%	6%	1%	5%	6%	5%	5%	3%	5%	3%	7%	5%	5%	7%	3%	0%	4%	6%	4%	6%	3%	6%	4%	6%	5%	7%	3%	4%

How do you plan to primarily use your federal tax refund this year?

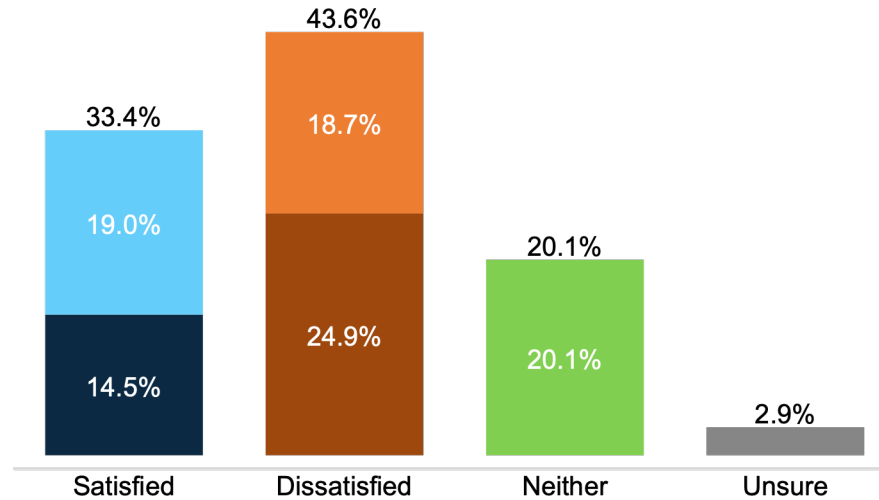
Amount Owed vs. Prior Year



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unempld/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
More than last year	38%	30%	42%	44%	33%	47%	28%	27%	48%	45%	30%	33%	46%	41%	47%	34%	30%	48%	31%	34%	40%	37%	38%	27%	41%	32%	34%	43%	41%	36%	36%	40%	37%	30%	43%	37%
Less than last year	31%	44%	27%	28%	25%	18%	42%	34%	39%	42%	33%	30%	27%	20%	34%	36%	33%	29%	28%	34%	29%	34%	46%	12%	32%	28%	34%	27%	36%	28%	38%	25%	30%	31%	29%	29%
Significantly more than last year	17%	15%	24%	17%	15%	19%	10%	10%	33%	21%	18%	14%	24%	22%	17%	15%	17%	28%	6%	16%	20%	20%	13%	11%	18%	18%	13%	24%	14%	21%	17%	17%	20%	12%	25%	14%
Somewhat more than last year	20%	14%	19%	27%	19%	27%	18%	17%	15%	25%	13%	20%	22%	19%	31%	18%	12%	20%	25%	18%	20%	17%	24%	16%	23%	14%	21%	19%	28%	16%	19%	23%	17%	18%	18%	23%
About the same as last year	27%	18%	26%	24%	42%	35%	26%	26%	13%	10%	16%	33%	28%	34%	12%	31%	33%	22%	38%	25%	29%	12%	14%	61%	22%	39%	30%	22%	19%	31%	19%	30%	33%	30%	25%	29%
Somewhat less than last year	16%	26%	12%	14%	8%	9%	16%	14%	28%	18%	21%	17%	9%	6%	21%	12%	18%	14%	14%	17%	13%	12%	33%	7%	17%	11%	12%	20%	27%	8%	18%	13%	17%	20%	13%	15%
Significantly less than last year	16%	18%	15%	14%	16%	9%	26%	20%	11%	24%	12%	13%	17%	13%	13%	23%	15%	15%	14%	17%	17%	22%	12%	5%	15%	17%	22%	7%	9%	20%	21%	12%	13%	10%	17%	14%
I did not owe taxes last year / this is my first year filing	3%	9%	0%	3%	0%	0%	5%	9%	0%	3%	11%	4%	0%	5%	3%	0%	4%	1%	0%	7%	1%	12%	3%	0%	4%	1%	0%	8%	4%	3%	4%	4%	0%	6%	3%	5%
Unsure	1%	0%	5%	0%	0%	0%	0%	3%	0%	0%	9%	0%	0%	0%	3%	0%	0%	0%	4%	0%	0%	5%	0%	0%	1%	0%	2%	0%	0%	2%	3%	0%	0%	2%	0%	0%

Compared to last filing season, was the amount you owed in federal taxes this year...

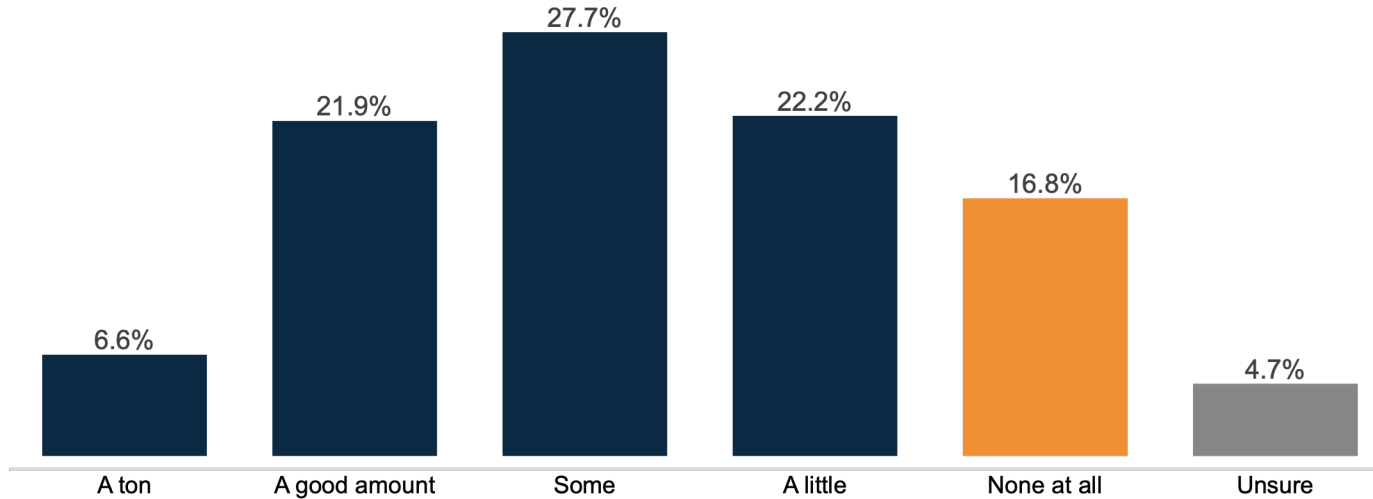
Satisfaction with Government Spending



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Satisfied Total	33%	34%	21%	50%	17%	37%	38%	31%	27%	30%	34%	29%	44%	34%	36%	28%	34%	41%	30%	29%	29%	40%	47%	31%	40%	21%	34%	33%	48%	26%	32%	33%	36%	30%	42%	29%
Dissatisfied Total	44%	38%	58%	28%	65%	49%	37%	39%	56%	44%	43%	47%	37%	44%	40%	48%	45%	36%	44%	52%	49%	40%	26%	35%	38%	55%	43%	44%	28%	53%	39%	48%	46%	39%	35%	53%
Very satisfied	14%	16%	6%	24%	3%	15%	17%	13%	13%	14%	11%	12%	21%	13%	16%	15%	12%	18%	11%	13%	11%	17%	27%	9%	19%	7%	16%	12%	23%	10%	14%	14%	16%	11%	19%	13%
Somewhat satisfied	19%	18%	14%	26%	14%	22%	21%	18%	14%	16%	23%	17%	23%	21%	19%	13%	22%	19%	16%	17%	23%	20%	22%	21%	14%	18%	21%	25%	16%	18%	19%	21%	20%	23%	16%	
Neither satisfied nor dissatisfied	20%	25%	17%	19%	16%	14%	23%	26%	15%	21%	20%	22%	17%	18%	21%	22%	19%	21%	24%	17%	19%	17%	23%	30%	20%	21%	20%	23%	18%	26%	16%	15%	27%	21%	16%	
Somewhat dissatisfied	19%	18%	24%	12%	25%	18%	16%	20%	21%	24%	15%	19%	17%	23%	18%	16%	17%	19%	17%	20%	21%	19%	12%	12%	17%	23%	19%	19%	15%	21%	16%	23%	16%	22%	17%	18%
Very dissatisfied	25%	20%	34%	16%	41%	31%	20%	19%	34%	20%	27%	28%	20%	22%	21%	32%	27%	17%	27%	32%	29%	21%	14%	23%	21%	32%	25%	25%	13%	32%	22%	25%	30%	17%	18%	34%
Unsure	3%	3%	4%	2%	1%	0%	3%	4%	2%	5%	3%	2%	2%	4%	3%	2%	2%	2%	2%	2%	3%	3%	4%	3%	2%	4%	2%	4%	1%	3%	3%	3%	2%	4%	2%	2%

Thinking about how your federal tax dollars are used by the government, how satisfied are you with how that money is being spent?

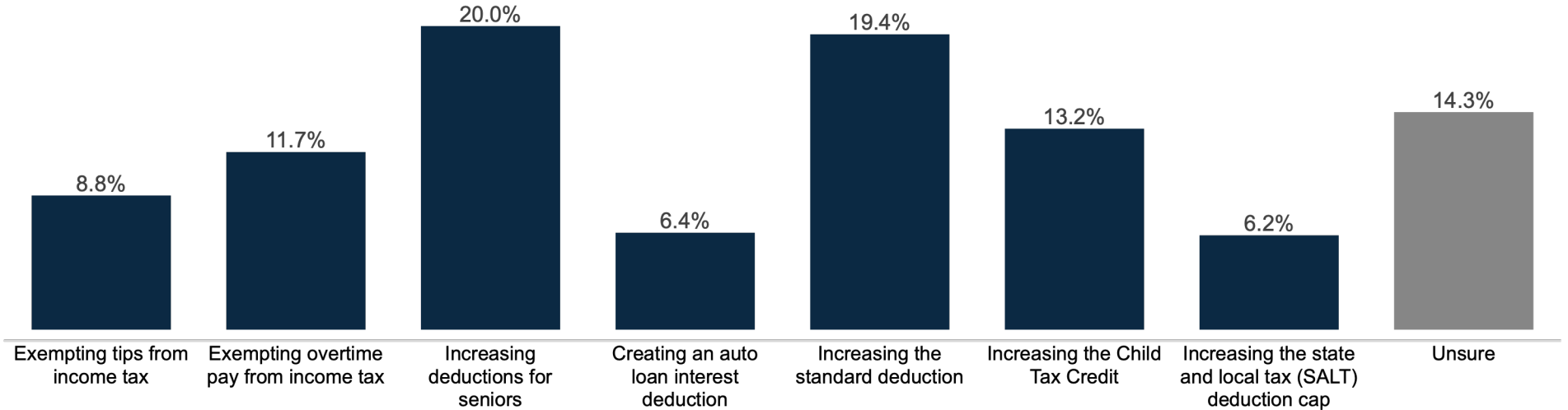
Tax Relief Awareness



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemplyd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
A ton	7%	7%	1%	9%	8%	11%	6%	3%	9%	3%	5%	8%	7%	6%	6%	5%	8%	9%	8%	4%	5%	10%	9%	5%	8%	5%	6%	8%	10%	5%	4%	7%	11%	4%	8%	7%
A good amount	22%	22%	8%	30%	22%	27%	26%	16%	20%	15%	25%	24%	21%	19%	22%	18%	28%	23%	16%	25%	20%	22%	30%	23%	25%	17%	23%	20%	32%	17%	20%	23%	25%	21%	26%	22%
Some	28%	25%	26%	30%	29%	30%	29%	25%	27%	28%	23%	29%	28%	30%	25%	32%	26%	30%	25%	26%	27%	33%	24%	24%	28%	27%	27%	29%	32%	26%	25%	30%	29%	30%	27%	28%
A little	22%	23%	30%	18%	21%	19%	20%	24%	27%	27%	25%	21%	20%	27%	20%	25%	19%	20%	24%	24%	23%	18%	20%	33%	21%	24%	23%	21%	19%	24%	24%	22%	21%	21%	20%	24%
None at all	17%	18%	27%	10%	16%	10%	15%	26%	12%	19%	18%	15%	18%	13%	21%	16%	14%	14%	19%	18%	19%	16%	13%	10%	14%	22%	18%	16%	6%	23%	23%	13%	12%	18%	13%	16%
Unsure	5%	6%	7%	3%	3%	2%	3%	7%	5%	7%	5%	3%	5%	4%	6%	5%	4%	4%	8%	3%	6%	2%	4%	4%	4%	6%	4%	6%	2%	5%	5%	6%	3%	6%	4%	4%

How much, if at all, have you seen, read, or heard about recent federal legislation that reduced federal income taxes for individuals and businesses?

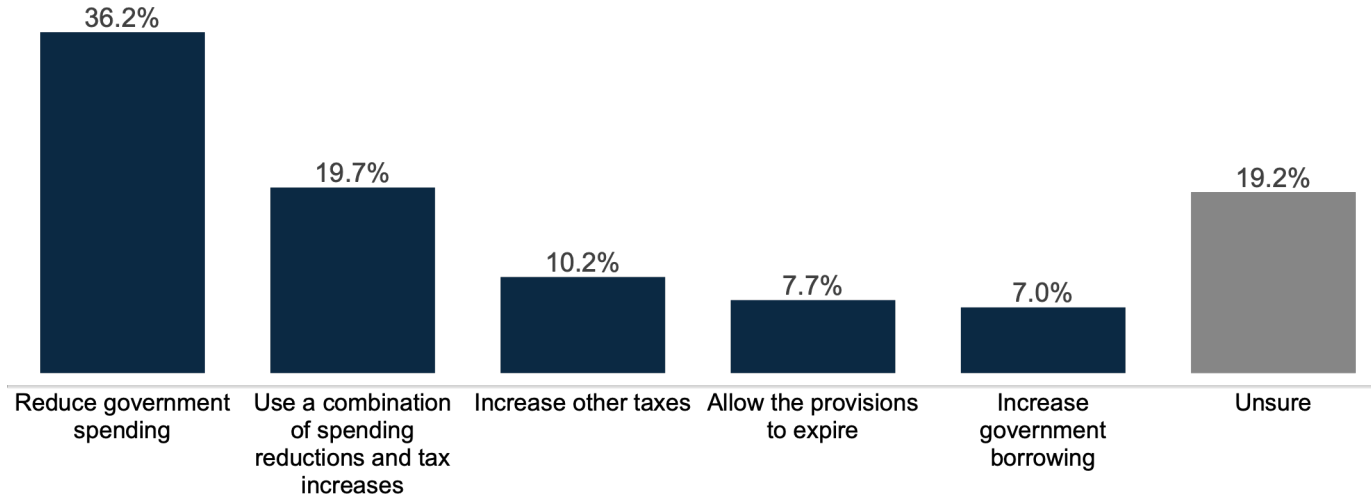
Tax Relief Position



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemplpyd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Exempting tips from income tax	9%	10%	7%	11%	5%	7%	10%	9%	10%	9%	10%	10%	6%	10%	9%	8%	9%	10%	7%	9%	8%	8%	10%	13%	8%	11%	9%	9%	12%	8%	9%	8%	10%	10%	9%	8%
Exempting overtime pay from income tax	12%	12%	5%	18%	6%	11%	16%	11%	7%	13%	11%	11%	12%	13%	11%	12%	12%	14%	11%	10%	11%	13%	14%	10%	15%	5%	13%	9%	17%	9%	11%	13%	10%	13%	17%	7%
Increasing deductions for seniors	20%	8%	41%	6%	46%	27%	16%	17%	22%	16%	21%	22%	19%	19%	19%	22%	20%	22%	20%	19%	26%	13%	12%	13%	12%	35%	18%	24%	9%	26%	19%	22%	17%	14%	21%	22%
Creating an auto loan interest deduction	6%	7%	3%	9%	3%	7%	7%	5%	7%	4%	7%	7%	7%	6%	6%	7%	7%	6%	4%	8%	5%	10%	9%	4%	8%	3%	6%	7%	12%	3%	7%	5%	9%	5%	6%	7%
Increasing the standard deduction	19%	18%	23%	18%	22%	22%	17%	18%	23%	16%	25%	20%	18%	23%	19%	19%	17%	21%	21%	18%	21%	13%	20%	24%	21%	17%	20%	19%	19%	20%	17%	20%	23%	18%	21%	19%
Increasing the Child Tax Credit	13%	18%	7%	18%	4%	13%	12%	14%	14%	12%	11%	12%	17%	12%	13%	12%	14%	11%	11%	17%	10%	21%	15%	12%	15%	9%	14%	12%	13%	14%	12%	15%	12%	14%	11%	16%
Increasing the state and local tax (SALT) deduction cap	6%	6%	3%	9%	6%	8%	7%	6%	2%	8%	5%	6%	6%	8%	7%	3%	6%	7%	6%	6%	6%	7%	7%	7%	7%	5%	6%	6%	10%	4%	6%	5%	9%	7%	6%	7%
Unsure	14%	22%	12%	11%	9%	5%	14%	20%	15%	23%	9%	12%	15%	9%	16%	16%	16%	10%	20%	13%	13%	15%	13%	18%	14%	15%	14%	14%	9%	15%	19%	11%	9%	20%	9%	14%

Which of the following recent changes to federal income tax law do you support most?

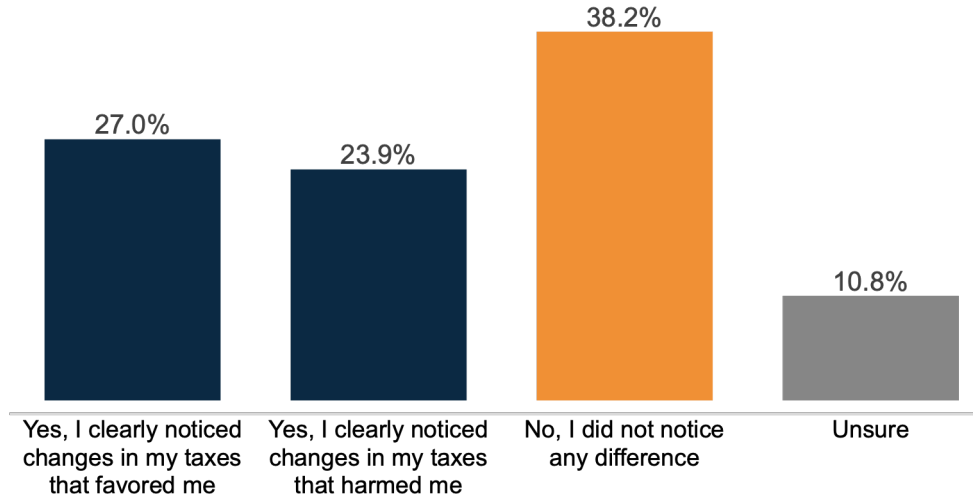
Extending OB3 Position



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tips/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Reduce government spending	36%	25%	49%	30%	55%	41%	38%	31%	37%	33%	34%	41%	31%	35%	34%	39%	38%	42%	36%	31%	41%	32%	24%	36%	34%	40%	36%	36%	28%	41%	32%	39%	39%	31%	43%	32%
Use a combination of spending reductions and tax increases	20%	21%	15%	24%	14%	23%	18%	19%	20%	19%	19%	19%	22%	23%	19%	19%	19%	19%	22%	17%	25%	23%	24%	22%	16%	19%	21%	24%	17%	18%	21%	22%	22%	19%	21%	
Increase other taxes	10%	11%	6%	13%	9%	12%	11%	10%	7%	7%	11%	8%	16%	11%	10%	7%	12%	9%	8%	13%	9%	13%	15%	11%	11%	10%	9%	12%	12%	9%	10%	9%	12%	10%	10%	13%
Allow the provisions to expire	8%	11%	2%	10%	3%	7%	8%	7%	9%	8%	13%	7%	6%	4%	10%	7%	8%	9%	5%	8%	7%	5%	12%	9%	9%	6%	8%	6%	14%	4%	10%	7%	5%	7%	8%	7%
Increase government borrowing	7%	8%	0%	13%	3%	8%	10%	5%	5%	5%	8%	7%	8%	6%	6%	7%	9%	8%	7%	7%	5%	10%	10%	2%	9%	4%	7%	6%	14%	4%	7%	7%	8%	6%	8%	7%
Unsure	19%	25%	28%	10%	15%	8%	15%	28%	22%	28%	16%	18%	17%	21%	21%	20%	15%	13%	24%	20%	21%	14%	16%	17%	16%	25%	20%	18%	9%	24%	23%	17%	14%	23%	12%	20%

Some provisions of the recent federal tax changes – including deductions for tips, overtime pay, seniors, auto loan interest, a higher SALT deduction cap, and other temporary tax relief – will expire after 2028/2029 unless Congress acts to extend them. If Congress decides to extend these provisions, how do you think lawmakers should respond to the resulting reduction in federal revenue?

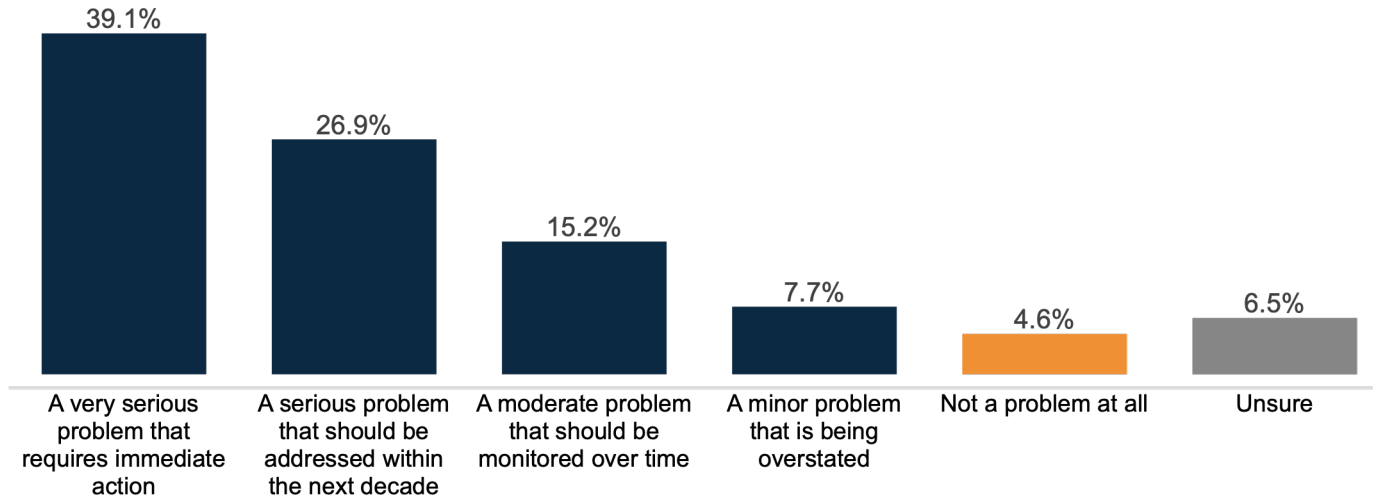
Impact of Tax Relief



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Yes Total	51%	58%	34%	55%	47%	52%	52%	49%	50%	50%	59%	50%	49%	44%	56%	50%	50%	56%	49%	49%	47%	57%	66%	45%	55%	42%	52%	50%	71%	40%	51%	51%	51%	52%	57%	50%
Yes, I clearly noticed changes in my taxes that favored me	27%	25%	23%	28%	33%	32%	27%	24%	25%	26%	27%	29%	24%	25%	29%	26%	26%	35%	23%	22%	28%	29%	26%	19%	27%	28%	25%	36%	23%	23%	28%	33%	25%	36%	23%	
Yes, I clearly noticed changes in my taxes that harmed me	24%	32%	11%	27%	14%	20%	25%	25%	24%	32%	21%	26%	19%	27%	24%	24%	20%	26%	27%	19%	28%	41%	26%	28%	15%	23%	25%	35%	18%	28%	22%	18%	28%	21%	27%	
No, I did not notice any difference	38%	32%	49%	36%	43%	40%	38%	38%	36%	34%	34%	39%	41%	44%	34%	42%	37%	36%	39%	40%	42%	32%	24%	45%	36%	43%	39%	37%	23%	47%	37%	37%	41%	35%	36%	39%
Unsure	11%	11%	16%	8%	10%	7%	10%	12%	13%	16%	8%	11%	9%	12%	10%	8%	13%	8%	12%	11%	11%	10%	10%	11%	9%	14%	9%	14%	6%	13%	11%	12%	8%	13%	7%	11%

Did you notice any difference in your tax outcome this year that you believe was due to the recent federal tax changes?

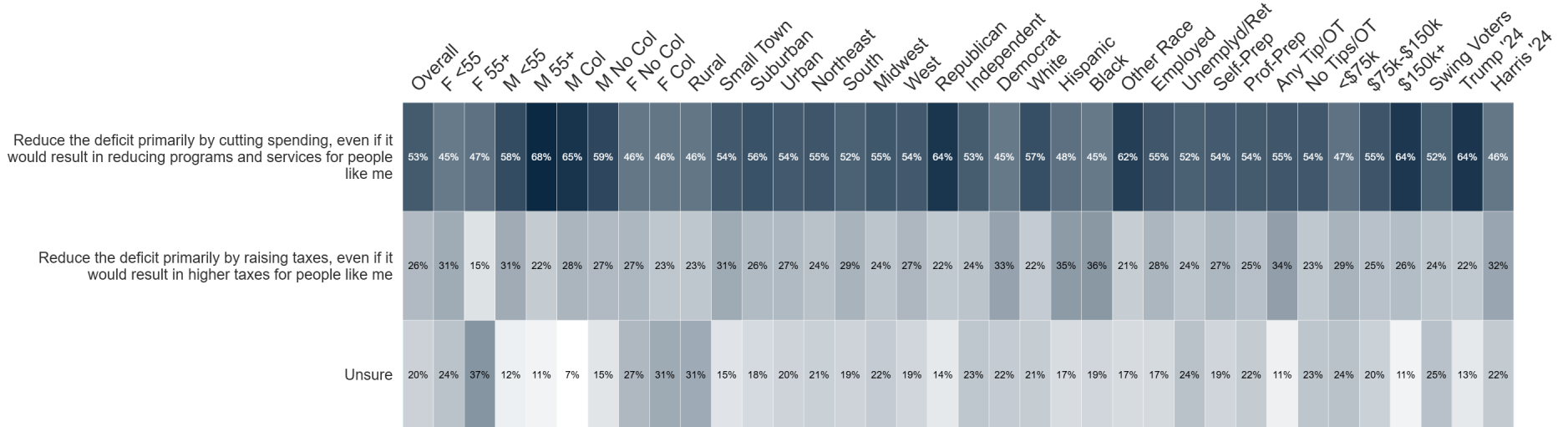
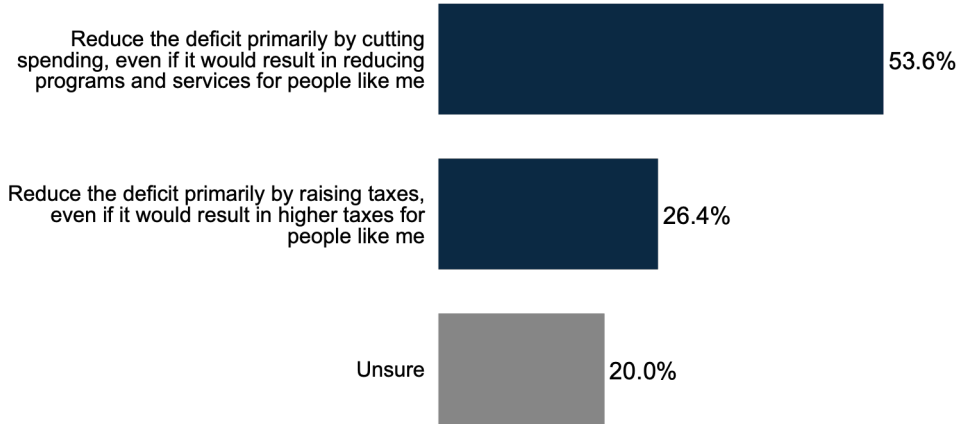
Seriousness of Federal Deficit



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
A very serious problem that requires immediate action	39%	30%	52%	30%	57%	45%	36%	35%	42%	36%	37%	43%	35%	36%	44%	43%	39%	44%	37%	43%	37%	29%	30%	37%	44%	38%	41%	32%	44%	36%	39%	45%	34%	40%	42%	
A serious problem that should be addressed within the next decade	27%	25%	28%	31%	23%	28%	28%	23%	33%	25%	24%	27%	30%	31%	23%	29%	28%	30%	22%	29%	27%	26%	25%	32%	28%	25%	27%	27%	29%	26%	25%	29%	29%	24%	28%	28%
A moderate problem that should be monitored over time	15%	17%	7%	19%	13%	17%	17%	14%	13%	14%	19%	16%	13%	19%	15%	14%	13%	14%	15%	17%	15%	12%	21%	13%	17%	12%	17%	13%	19%	13%	14%	18%	12%	18%	15%	14%
A minor problem that is being overstated	8%	12%	3%	9%	4%	5%	8%	10%	6%	8%	7%	6%	11%	7%	11%	6%	5%	7%	8%	8%	5%	13%	9%	11%	8%	7%	8%	10%	6%	10%	6%	7%	9%	8%	8%	
Not a problem at all	5%	7%	2%	6%	1%	2%	6%	7%	2%	6%	5%	3%	6%	2%	6%	4%	5%	5%	4%	5%	3%	7%	7%	6%	5%	4%	5%	4%	7%	4%	6%	4%	3%	4%	5%	4%
Unsure	6%	8%	10%	5%	2%	3%	5%	11%	4%	11%	8%	5%	6%	6%	8%	4%	6%	4%	8%	5%	6%	5%	8%	8%	5%	8%	7%	6%	4%	7%	9%	5%	4%	10%	4%	4%

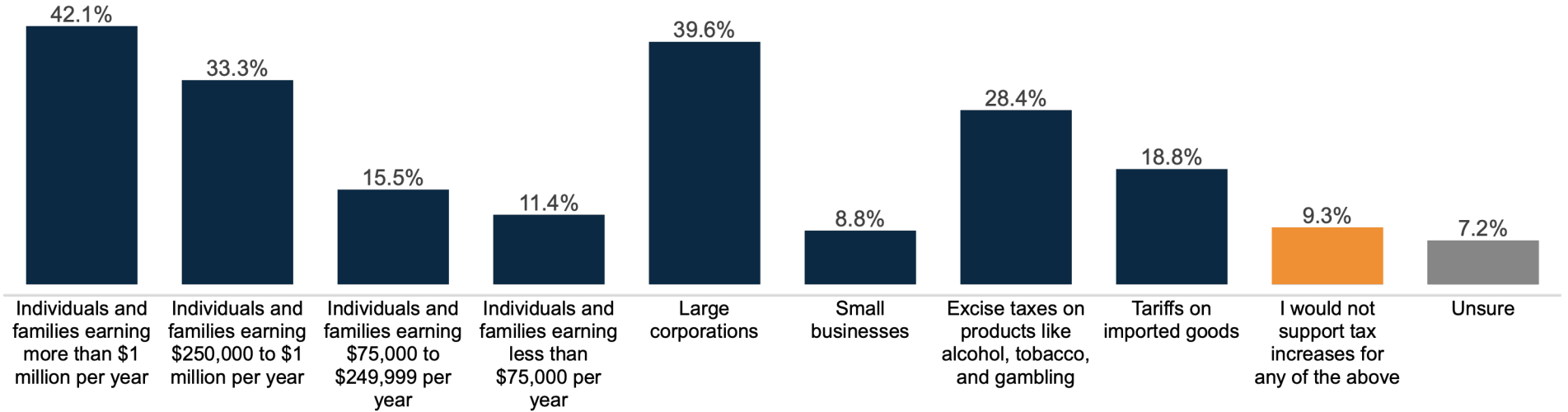
The federal government typically spends more money each year than it collects in taxes, resulting in a budget deficit and \$38 trillion in national debt. How serious a problem do you consider this?

Deficit Reduction Tradeoff



If reducing the national debt required choosing one of the following tradeoffs, which would you prefer?

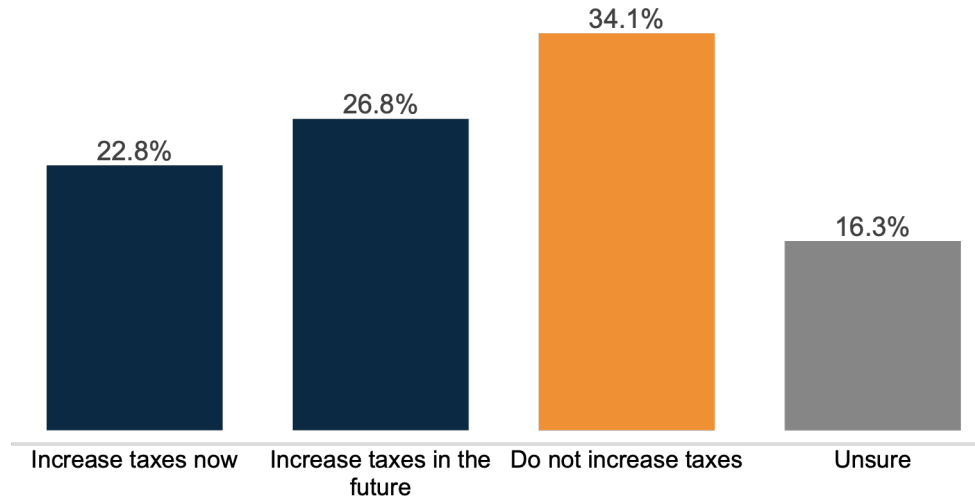
Tax Increase Approach



	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployed/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Individuals and families earning more than \$1 million per year	42%	32%	55%	36%	57%	50%	40%	35%	50%	38%	36%	44%	44%	43%	39%	48%	41%	38%	44%	46%	46%	36%	35%	34%	38%	50%	41%	44%	33%	47%	37%	45%	48%	38%	38%	49%
Individuals and families earning \$250,000 to \$1 million per year	33%	31%	37%	34%	33%	36%	31%	30%	39%	32%	33%	33%	35%	35%	31%	39%	30%	33%	29%	37%	36%	31%	32%	24%	33%	35%	34%	32%	33%	34%	34%	33%	31%	31%	32%	38%
Individuals and families earning \$75,000 to \$249,999 per year	15%	17%	10%	21%	8%	15%	18%	15%	13%	14%	11%	16%	17%	12%	18%	15%	14%	17%	12%	17%	14%	21%	19%	8%	17%	13%	18%	10%	22%	12%	18%	14%	12%	14%	15%	17%
Individuals and families earning less than \$75,000 per year	11%	12%	5%	18%	5%	13%	14%	8%	14%	8%	9%	12%	14%	11%	15%	10%	8%	11%	10%	14%	9%	16%	16%	10%	14%	6%	13%	9%	21%	6%	11%	14%	8%	12%	11%	14%
Large corporations	40%	32%	51%	38%	45%	43%	39%	34%	48%	37%	30%	43%	40%	43%	36%	44%	38%	33%	41%	46%	43%	35%	29%	40%	37%	45%	39%	40%	30%	45%	35%	43%	42%	36%	34%	45%
Small businesses	9%	11%	3%	14%	2%	8%	11%	7%	10%	11%	8%	7%	11%	10%	10%	7%	8%	9%	8%	10%	7%	11%	16%	8%	11%	4%	10%	7%	14%	6%	11%	7%	8%	9%	10%	10%
Excise taxes on products like alcohol, tobacco, and gambling	29%	23%	38%	26%	33%	33%	25%	24%	38%	24%	34%	30%	26%	34%	26%	29%	26%	31%	26%	29%	31%	27%	18%	31%	27%	31%	30%	26%	25%	31%	24%	32%	30%	27%	30%	31%
Tariffs on imported goods	19%	14%	23%	21%	20%	22%	20%	19%	12%	28%	17%	15%	20%	15%	19%	19%	21%	31%	13%	11%	21%	15%	17%	15%	18%	21%	19%	18%	21%	18%	17%	22%	18%	17%	31%	9%
I would not support tax increases for any of the above	9%	13%	10%	4%	11%	7%	7%	15%	6%	10%	14%	10%	6%	9%	10%	7%	10%	9%	11%	7%	10%	6%	8%	13%	9%	9%	9%	9%	5%	12%	10%	8%	10%	9%	11%	6%
Unsure	7%	9%	7%	6%	5%	4%	7%	10%	6%	9%	7%	6%	8%	6%	8%	7%	6%	5%	9%	6%	6%	8%	9%	11%	6%	8%	8%	6%	5%	7%	10%	6%	5%	10%	5%	5%

The U.S. national debt is currently over \$38 trillion, and the U.S. federal government spent roughly \$1.8 trillion more than it collected in tax revenue last year. If lawmakers decided that tax increases were necessary to help reduce the national debt and deficit, which of the following would you support a tax increase for? Select all that apply.

Aging U.S. Impact on Programs

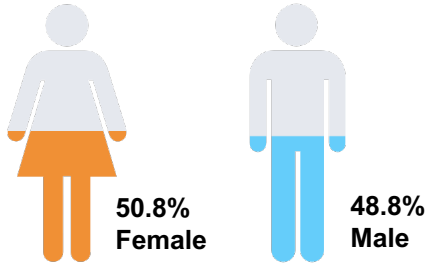


	Overall	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	Rural	Small Town	Suburban	Urban	Northeast	South	Midwest	West	Republican	Independent	Democrat	White	Hispanic	Black	Other Race	Employed	Unemployd/Ret	Self-Prep	Prof-Prep	Any Tip/OT	No Tip/OT	<\$75k	\$75k-\$150k	\$150k+	Swing Voters	Trump '24	Harris '24
Increase taxes	49%	46%	35%	62%	49%	61%	53%	40%	48%	37%	57%	50%	54%	48%	48%	47%	57%	46%	43%	59%	44%	59%	57%	58%	54%	42%	50%	49%	64%	42%	48%	49%	55%	49%	46%	57%
Increase taxes now	23%	16%	18%	26%	34%	37%	21%	14%	21%	15%	20%	24%	27%	19%	21%	27%	26%	24%	18%	26%	22%	26%	22%	19%	23%	22%	23%	22%	25%	21%	18%	23%	31%	18%	24%	26%
Increase taxes in the future	27%	31%	17%	35%	15%	24%	32%	26%	27%	22%	37%	26%	26%	28%	27%	20%	30%	23%	25%	33%	21%	34%	34%	39%	30%	20%	27%	27%	39%	21%	29%	26%	24%	31%	22%	31%
Do not increase taxes	34%	36%	40%	29%	35%	25%	37%	40%	33%	44%	27%	33%	33%	37%	35%	37%	28%	42%	36%	26%	37%	30%	32%	29%	33%	36%	34%	34%	26%	39%	35%	36%	29%	31%	42%	27%
Unsure	16%	18%	25%	10%	17%	14%	10%	21%	19%	19%	16%	17%	13%	15%	17%	16%	15%	12%	21%	14%	19%	11%	11%	13%	13%	22%	16%	17%	9%	19%	17%	15%	16%	21%	13%	16%

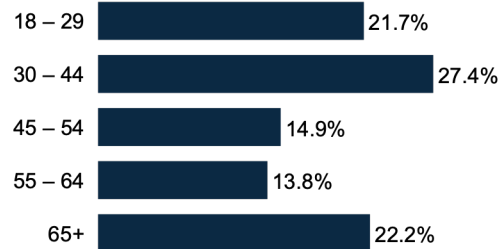
As the U.S. population ages, spending on Social Security and Medicare is expected to rise. Do you think taxes should be increased now, increased in the future, or not increased at all to support these programs?

Demographics (Overall)

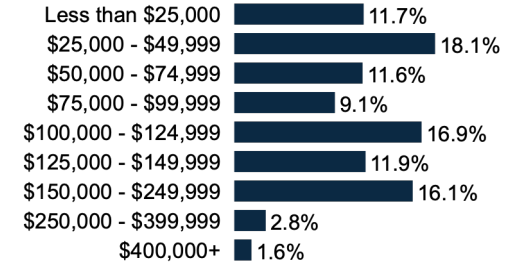
Sex



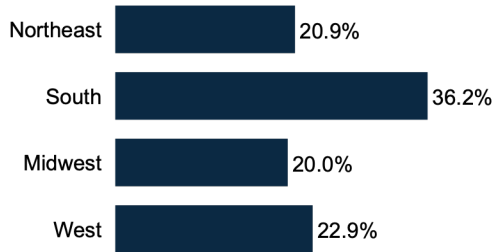
Age Range



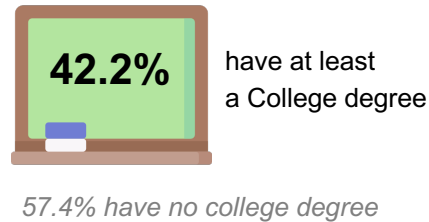
Household Income



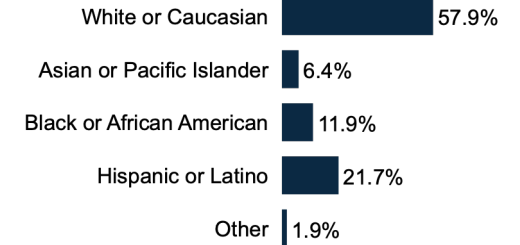
Geo - Region



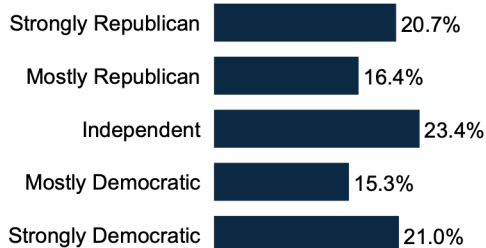
Education



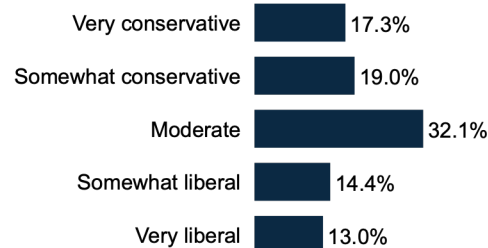
Race/Ethnicity



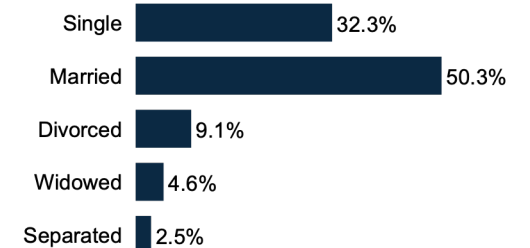
Partisanship



Ideology



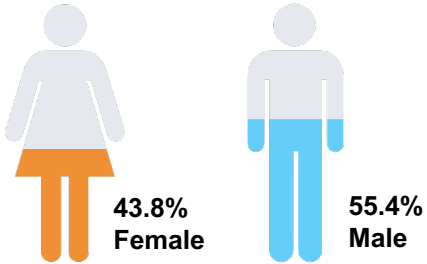
Marital Status



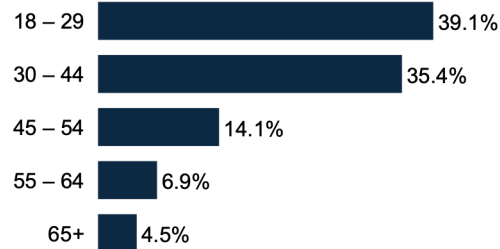
Sample size: 1200

Demographics (Any Tip/OT)

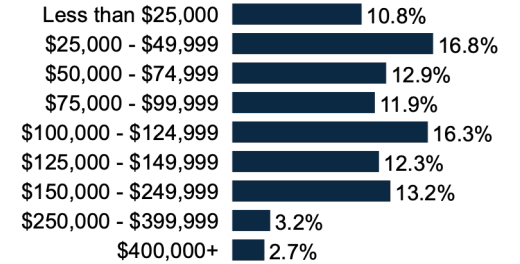
Sex



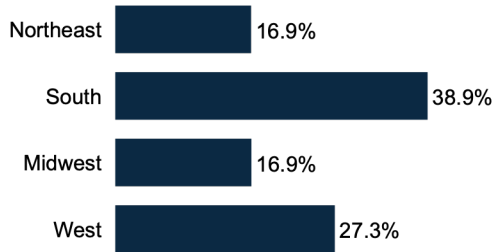
Age Range



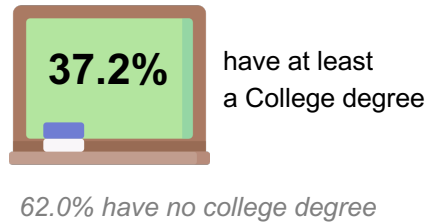
Household Income



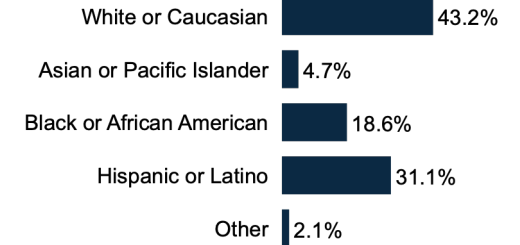
Geo - Region



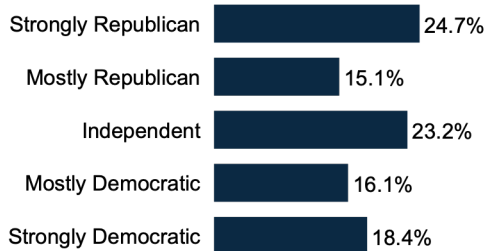
Education



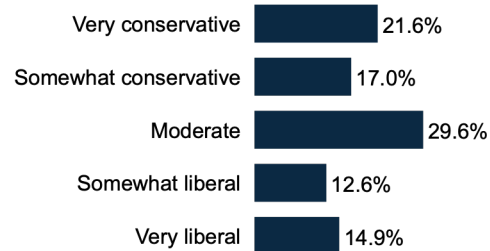
Race/Ethnicity



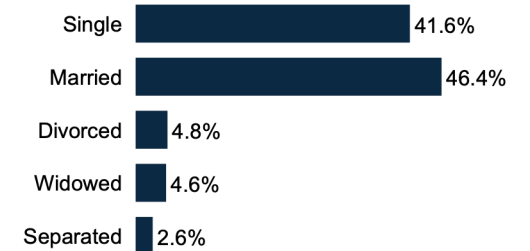
Partisanship



Ideology

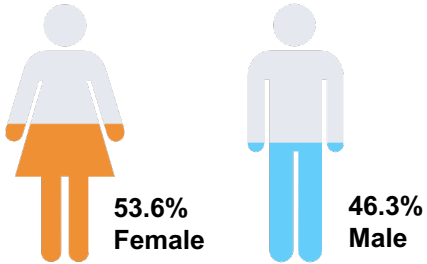


Marital Status

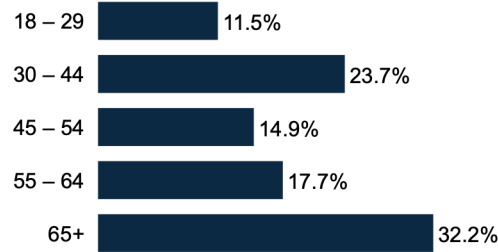


Demographics (No Tips/OT)

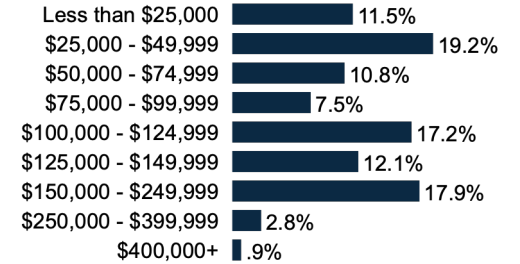
Sex



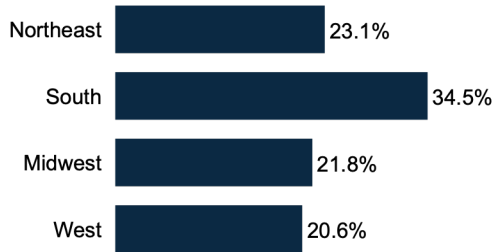
Age Range



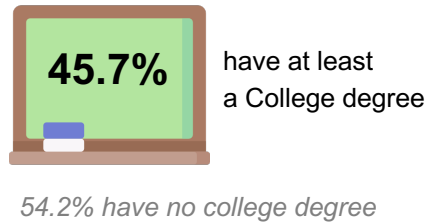
Household Income



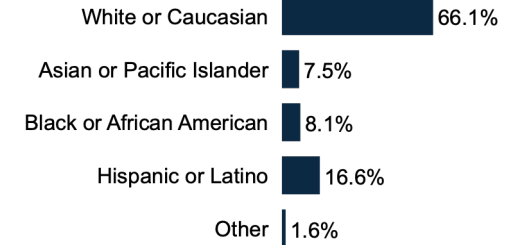
Geo - Region



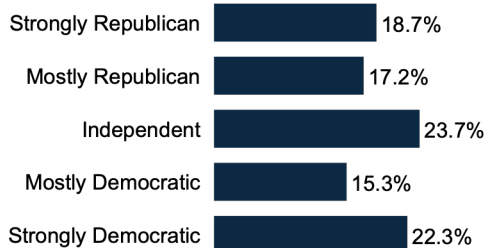
Education



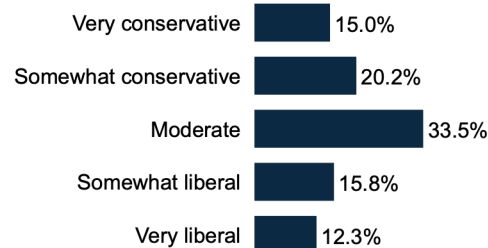
Race/Ethnicity



Partisanship



Ideology



Marital Status

