

Market, Not Mandate



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Main Points

- eFile & Pay marketing
- Participation rates
- Income tax marketing
- Participation rates

eFile & Pay Mailings

- Heads-up letter
- BEN (Business eFile Number) letter
- Encouragement letter
- Consolidated sales tax letter
- Paper return **and** BEN letter to annual filers



eFile & Pay Marketing

- Press conference
- Story to media
- Postcard of classes
- Information on Web site
- Payment vouchers
- Ads in various state publications

Percent of Returns eFiled

September 2005

Withholding: 91%

Sales/Use: 91%

December 2006

Withholding: 99%

Sales/Use: 94%

Motor Fuel: 99%



Percent of Electronic Payments

December 2006 Quarter

Withholding: 61%

Sales/Use: 47%

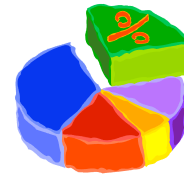
Motor Fuel: 99%

Percent of Dollars Received Electronically

December 2006 Quarter

Withholding: 86%

Sales/Use: 82%



eFile & Pay Correspondence Today

- Paid, but didn't file letter
- Didn't file, didn't pay letter
- Quarterly email reminder
- Potential missing return email



eFile & Pay Marketing Today



- ePay postcards
- Promo ads in state publications
- Web site
- Joint presentations



Income Tax Marketing



- Tax booklet
- Bookmarks
- Inserts with:
 - Checks
 - Bills
 - Bank statements
 - Refund checks



Income Marketing, con't.

- E-mails
- Billing statements
- News releases
- Press conference
- Library open houses



Income Marketing, con't.

- Postcards
- Posters to teachers
- Web site
- Tax eNews (IDR quarterly newsletter)
- IDR customer support

Income Tax eFile Participation

TY2004:

- ELF: 850,947
- TeleFile: 19,805

TY2005:

- ELF: 913,274
- TeleFile: 10,427

TY2006 (as of 5/3/07):

- ELF: 946,112
- TeleFile: 7,088



Base: 1.39 million returns

Income Marketing Today

- ✓ Income tax booklet
- ✓ Paycheck stuffer
- ✓ Online payroll system ad
- ✓ Five lowest eFile counties
- ✓ Human Services: 7,200 eFile inserts



Next Income Marketing Plan



- Focus on schools
- Large employers
- State employees



Summary



Marketing
Participation
rates



