



2D Barcode

2006 User Survey

Tuesday, May 29, 2007

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The slide features a large, semi-circular image of the Indiana State Capitol dome on the left side. The dome is white with a gold top, set against a blue sky. The rest of the slide is white with a faint, light blue watermark of the Indiana state seal in the background. The text is in a blue, sans-serif font. At the bottom, there is a blue horizontal bar with a small yellow outline of the state of Indiana on the left and the text 'Indiana Department of Revenue' on the right. The date 'Tuesday, May 29, 2007' is located in the bottom left corner.



Purpose & Methodology

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The slide features a smaller, circular image of the Indiana State Capitol building on the left side. The building is white with a gold dome, set against a blue sky. The rest of the slide is white with a faint, light blue watermark of the Indiana state seal in the background. The text is in a blue, sans-serif font. At the bottom, there is a blue horizontal bar with a small yellow outline of the state of Indiana on the left and the text 'Indiana Department of Revenue' on the right. The date 'Tuesday, May 29, 2007' is located in the bottom left corner.



Purpose of the Research

- **Collect market data (quantitative and qualitative):**

- Demographics.
 - Who uses 2D Barcode? Do any specific demographics emerge -- more women, more men, younger, older, lower income, higher income?
- Psychographics.
 - What is the main reason for using 2D Barcode? What facts about filing electronically are they aware of? How likely are they to submit 2006 Indiana taxes electronically?

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Methodology – Sample Selection

- **Systematic random sampling:**

- N= 611,574 2D-Barcode filers.
 - 65,534 e-mail addresses were captured from 2005 2D Barcode returns.
- S= 6,138.
 - Every sixth e-mail address was randomly selected from the captured e-mail addresses.

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Methodology – Survey Tool

- **10 questions.**

- Used combination of answer ranges, Likert-scaled responses and limited open-answer options.
- Estimated completion time – 10 minutes.

- **Administered electronically.**

- Issued via email.
 - Email addresses captured on 2D Barcode returns.
 - Link to online survey tool – quick, easy.

- **Timing.**

- Issued Oct. 17. Survey available for 1 week.

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Sample Results

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Overall Sample Results

Response results:

- 727 responded.
 - 95-percent confidence rate; minimum of +/- 5-percent margin of error

Demographics:

- **Gender – More men than women.**
 - Male – 67.3 percent
 - Female – 31.4 percent
- **Age – No particular age range emerged as a differentiator among 2D Barcode filers, although 84.7 percent are 36 years or older.**
 - 18-25 – 3.8 percent
 - 26-35 – 10.7 percent
 - 36-45 – 17.5 percent
 - 46-55 – 32.2 percent
 - 56-65 – 21.1 percent
 - Over 65 – 13.9 percent

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Sample Results (continued)

Demographics:

- **Household income – No particular income level emerged as a leading group of users.**
- **However, the higher the income, the more likely 2D Barcode was used to file.**
 - Below \$20K – 4.0 percent
 - \$21K - \$40K – 11.3 percent
 - \$41K - \$60K – 19.3 percent
 - \$61K - \$100K – 20 percent
 - More than \$100K – 25.8 percent

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Key Findings

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Key Findings

- **Taxes Prepared– How were 2005 state taxes prepared?**
 - Tax preparation software – 75.5 percent
 - Certified public accountant – 14.6 percent
- **Electronic Option – Were they given the option to submit taxes electronically?**
 - Yes – 78.3 percent
 - No – 11.9 percent
 - Unsure – 9.7 percent
- **Submit 2006 Indiana state taxes electronically**
 - 62.3 percent likely or very likely.
 - 36.3 percent unlikely or very unlikely.

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Key Findings

Electronic filing facts – Awareness?

- More than 1.4 million Hoosier taxpayers submitted 2005 taxes electronically.....26 percent
- Average time to receive a refund when filing electronically is 7 to 14 days.....65.7 percent
- Electronic return is delivered through a secure, encrypted connection.....61.5 percent
- Most accountants, tax preparation businesses and software can file electronically upon request....62.6 percent
- I-File allows Hoosier taxpayers to file and submit state taxes – free – via the Internet.....28.1 percent
- Just like taxpayers who choose not to file electronically, the due date for electronic filers who owe the Department is April 15.....71 percent

Just 28.1 percent are aware of I-File.

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Verbatims

- **Top reason for not submitting 2005 taxes electronically:**
 - Cost – 121 responses
 - “Cost of filing state electronically was not worthwhile. It is just as easy to fill in the paper and mail. If I could connect to an Internet site and file my state taxes directly, I would do so.”
 - “Did not want to pay a fee to submit.”
 - “Due to the price charged by CPA firm to do so.”

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Key Filing Results – 2006 Individual Tax Season

- 62.3 percent likely or very likely to file 2006 Indiana taxes electronically.
- Just 28.1 percent 2D filers were aware of I-File.
- The higher the income, the more likely 2D Barcode used to file.
- Cost is the top reason not submitting 2005 taxes electronically.

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I-File Marketing Plan

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Planning

Goal:

Increasing taxpayer use of I-File promotes one of the Department's main strategic goals, to use the Department's electronic programs more effectively and efficiently.

Overall Campaign Objective (Metric):

Increase I-File usage among Indiana individual income-tax filers by 15 percent by the end of the 2007 filing season.

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Overall Campaign Messages

Primary Campaign Messages:

- I-File is fast, friendly, free.
- File for FREE at www.ifile.in.gov
- No annual income restriction.
- Available Feb. 1, 2007.

Key Facts:

- File your Indiana individual income taxes FREE at www.ifile.in.gov
- 96 percent of I-File users would recommend I-File to others.
- Accepts Part-year (PNR) and Reciprocal Nonresident (RNR) filing.
- File multiple returns under one user profile.
- 2006 program upgrades include -- simplified login, easier navigation, improved help links and option to view tax form throughout filing.

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Key Stakeholders

- 2005 2D Barcode filers
- VITA Volunteers
- 2005 I-File users
- Indiana Department of Revenue Employees
- State Agencies
- Student /University Filers
- Media
- Indiana Taxpayers

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Key Stakeholder: 2D Barcode Filers

Strategic Intent: Develop an e-mail and direct-mail campaign to compel individuals that filed their 2005 Indiana individual income taxes using 2D Barcode to file their 2006 Indiana Individual Income taxes electronically.

Objectives:

- Decrease the number of 2006 returns filed by 2D Barcode by 10 percent from the 2005 filing season.
- Transform the 2D Barcode decrease into a 10-percent *increase* in I-File usage for the 2007 tax seasons.

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2D Barcode Filers Key Messages:

- FREE Indiana individual income tax filing www.ifile.in.gov
- **NO** annual income restriction.
- Accepts **Part-year** and **Reciprocal Nonresident** filing
- Available Feb. 1, 2007.

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Implementation

2D Barcode Filers Tactics :

- E-mail 2D survey findings/results to all e-mails captured (60,000) from 2005 2D Barcode returns. Include key messages.
- Create and send promotional postcard to 50,000 2005 2D Barcode filers.

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Evaluation

- 2D Barcode returns decreased by 28 percent.
- I-File usage increased by 15 percent.
- Overall electronic filing increased to 59 percent of total filing in 2007.
 - A 16-percent increase as total of all filing compared with 2006.

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