



# Tax Refund Survey

Friday, March 04, 2016

# 501

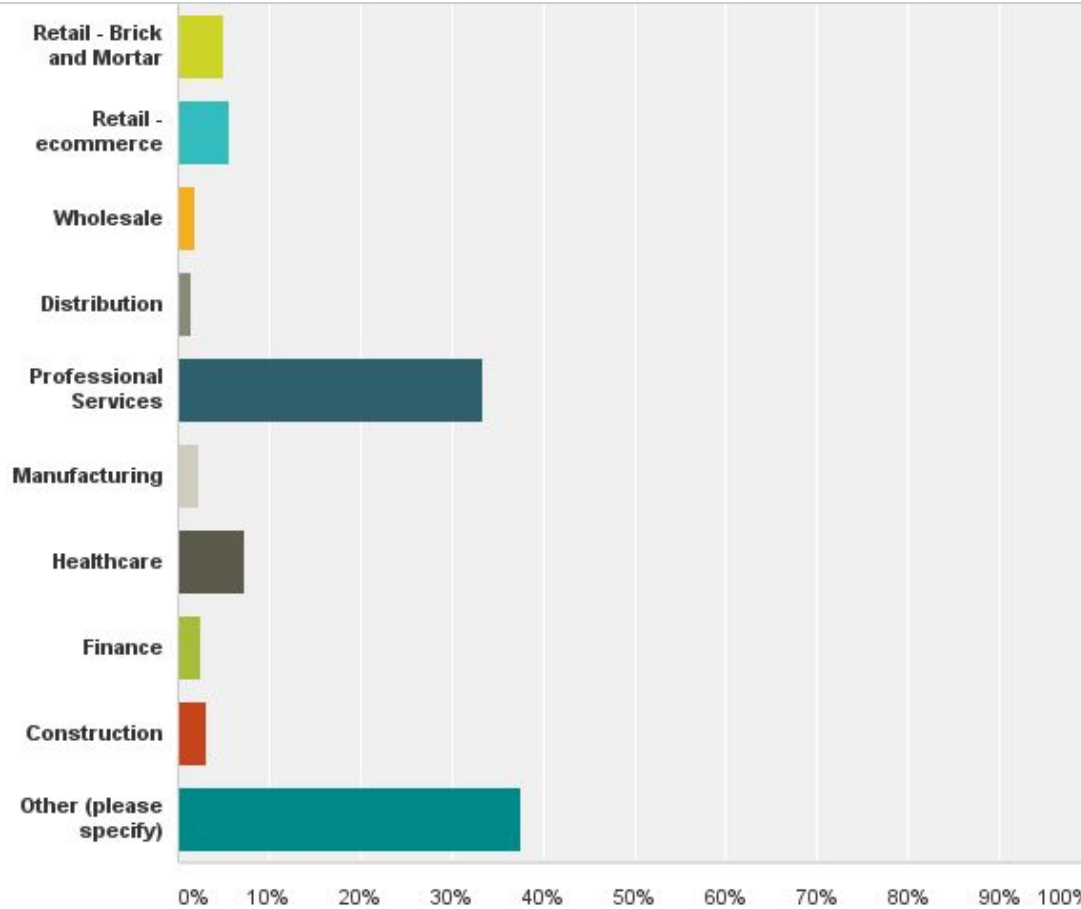
Total Responses

Date Created: Monday, February 22, 2016

Complete Responses: 501

# Q1: What type of business do you have? (Please check all that apply)

Answered: 501 Skipped: 0



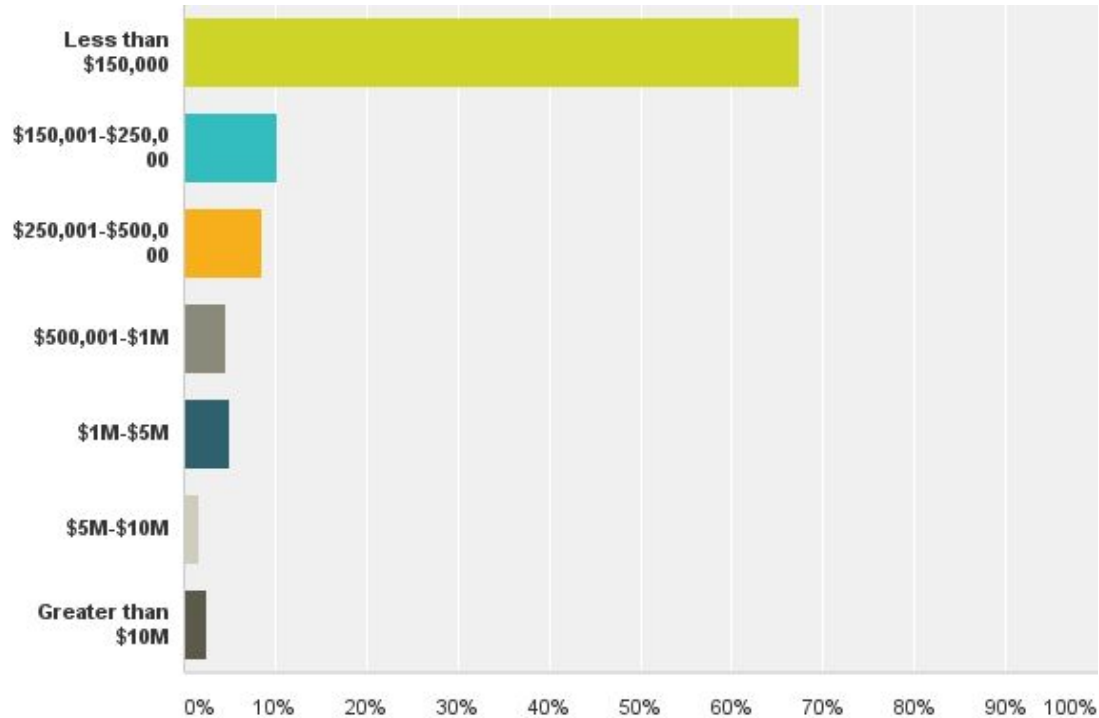
# Q1: What type of business do you have? (Please check all that apply)

Answered: 501 Skipped: 0

Answer Choices	Responses	
Retail - Brick and Mortar	4.99%	25
Retail - ecommerce	5.59%	28
Wholesale	1.80%	9
Distribution	1.40%	7
Professional Services	33.33%	167
Manufacturing	2.20%	11
Healthcare	7.39%	37
Finance	2.59%	13
Construction	3.19%	16
Other (please specify)	37.52%	188
<b>Total</b>		<b>501</b>

## Q2: What is your current annual gross revenue?

Answered: 501 Skipped: 0



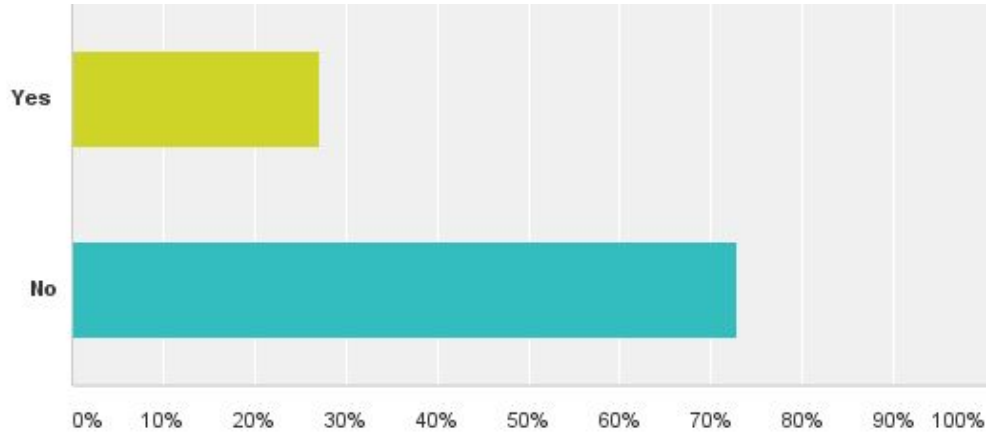
## Q2: What is your current annual gross revenue?

Answered: 501 Skipped: 0

Answer Choices	Responses	
Less than \$150,000	67.47%	338
\$150,001-\$250,000	10.18%	51
\$250,001-\$500,000	8.58%	43
\$500,001-\$1M	4.59%	23
\$1M-\$5M	4.99%	25
\$5M-\$10M	1.60%	8
Greater than \$10M	2.59%	13
<b>Total</b>		<b>501</b>

### Q3: Do you charge sales tax for your business?

Answered: 501 Skipped: 0



### Q3: Do you charge sales tax for your business?

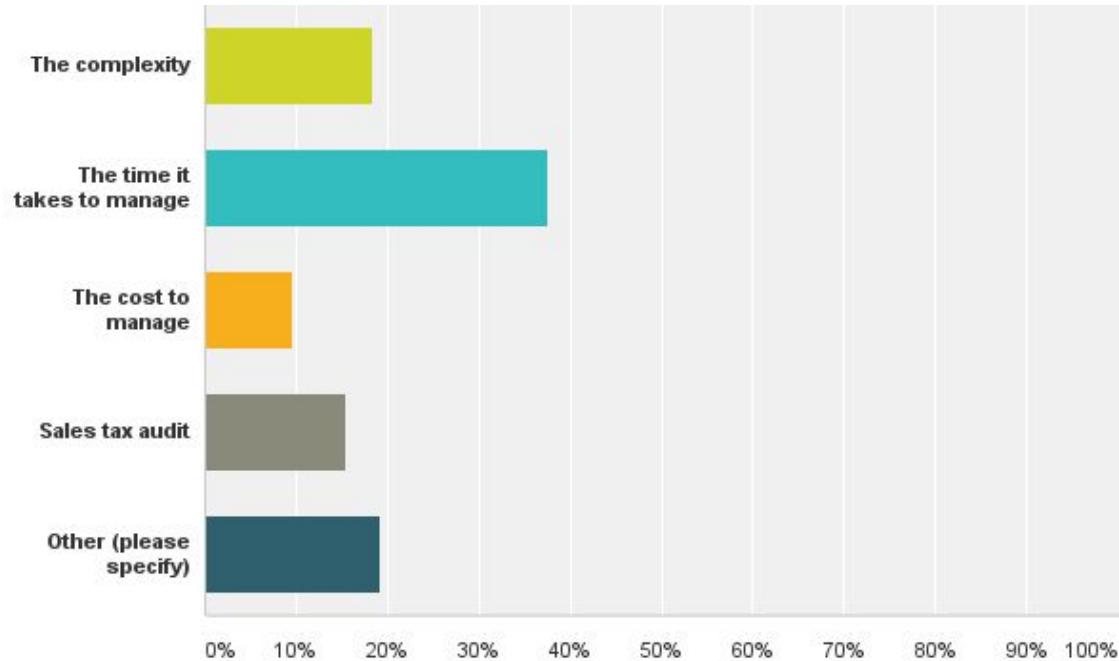
Answered: 501 Skipped: 0

Answer Choices	Responses
Yes	27.15% 136
No	72.85% 365
<b>Total</b>	<b>501</b>



## Q4: What is your biggest pain point around sales tax?

Answered: 136 Skipped: 365



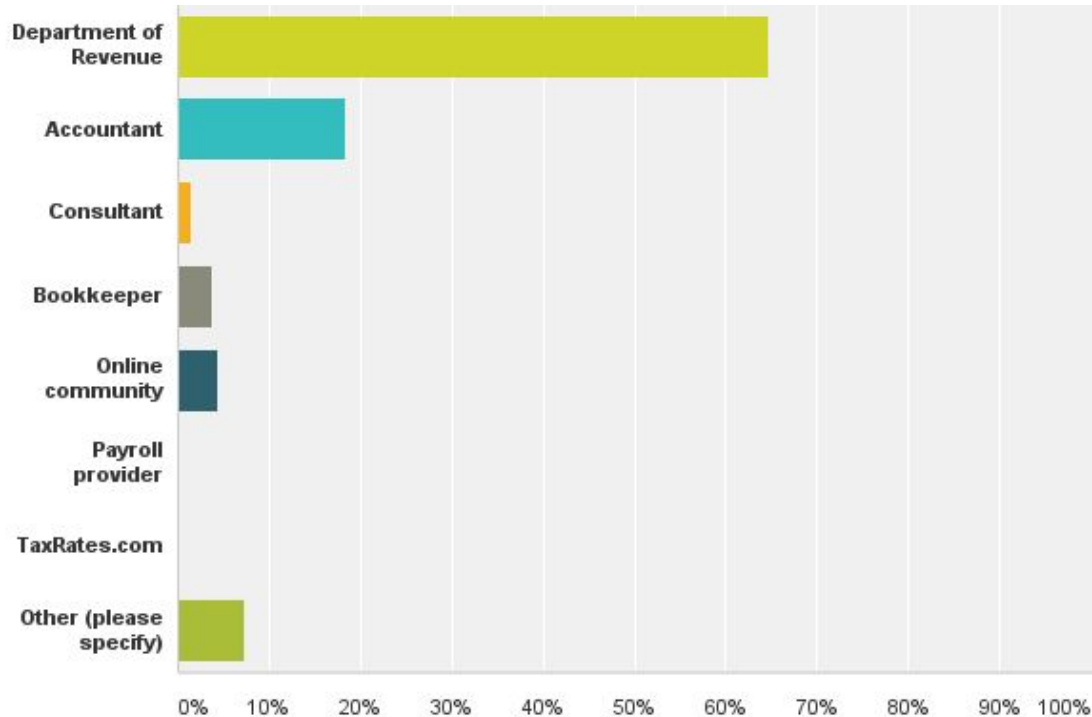
## Q4: What is your biggest pain point around sales tax?

Answered: 136 Skipped: 365

Answer Choices	Responses	
The complexity	<b>18.38%</b>	25
The time it takes to manage	<b>37.50%</b>	51
The cost to manage	<b>9.56%</b>	13
Sales tax audit	<b>15.44%</b>	21
Other (please specify)	<b>19.12%</b>	26
<b>Total</b>		<b>136</b>

# Q5: How do you get sales tax rate information?

Answered: 136 Skipped: 365



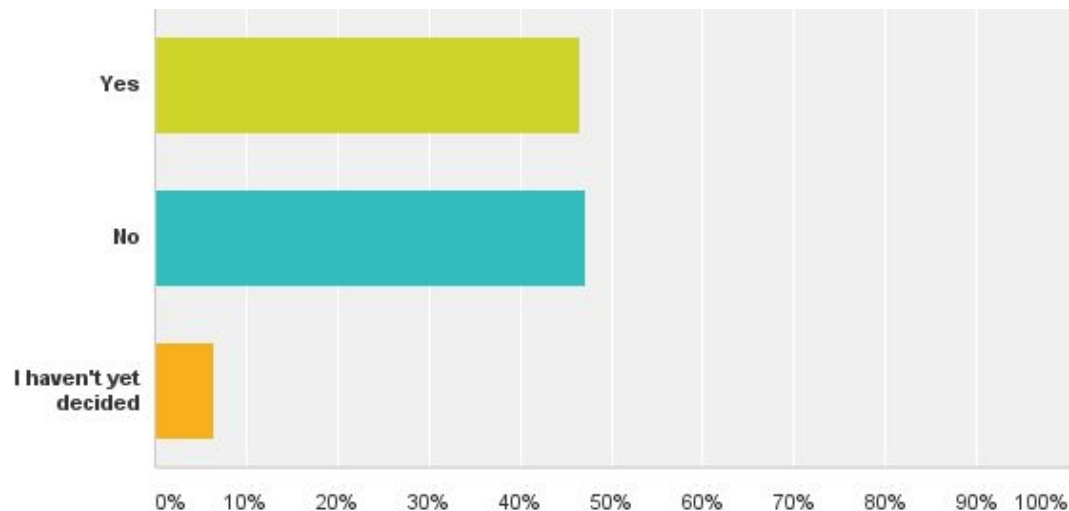
## Q5: How do you get sales tax rate information?

Answered: 136 Skipped: 365

Answer Choices	Responses	
Department of Revenue	<b>64.71%</b>	88
Accountant	<b>18.38%</b>	25
Consultant	<b>1.47%</b>	2
Bookkeeper	<b>3.68%</b>	5
Online community	<b>4.41%</b>	6
Payroll provider	<b>0.00%</b>	0
TaxRates.com	<b>0.00%</b>	0
Other (please specify)	<b>7.35%</b>	10
<b>Total</b>		<b>136</b>

## Q6: Are you filing taxes for your business separately from your personal filing?

Answered: 501 Skipped: 0



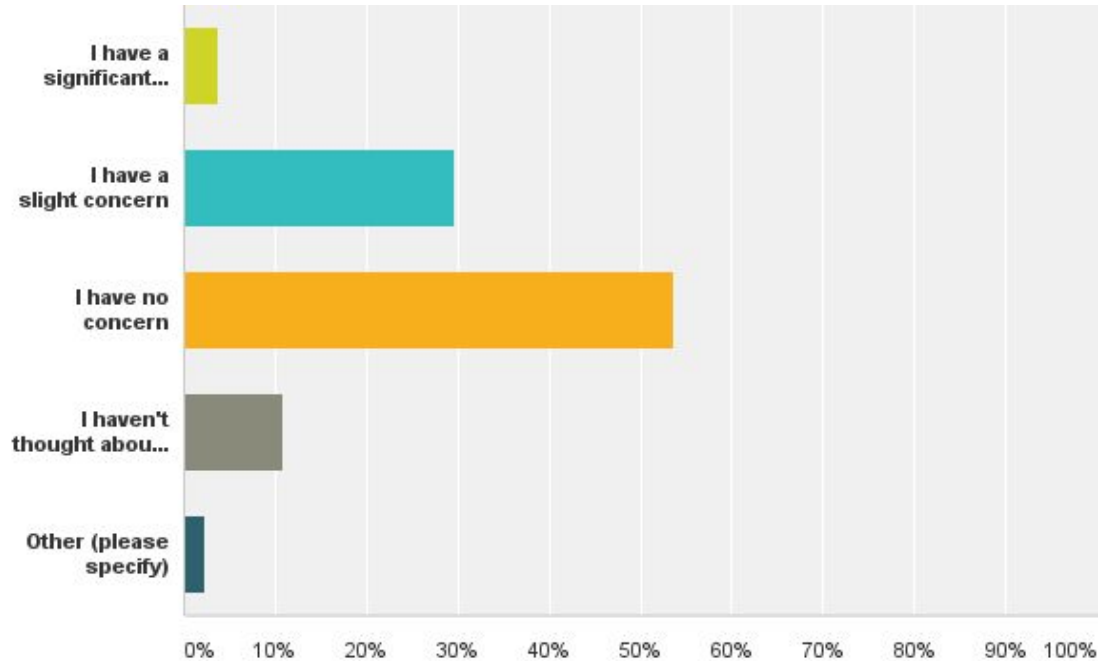
## Q6: Are you filing taxes for your business separately from your personal filing?

Answered: 501 Skipped: 0

Answer Choices	Responses
Yes	46.51% 233
No	47.11% 236
I haven't yet decided	6.39% 32
<b>Total</b>	<b>501</b>

## Q7: Does the idea of an audit concern you?

Answered: 501 Skipped: 0



## Q7: Does the idea of an audit concern you?

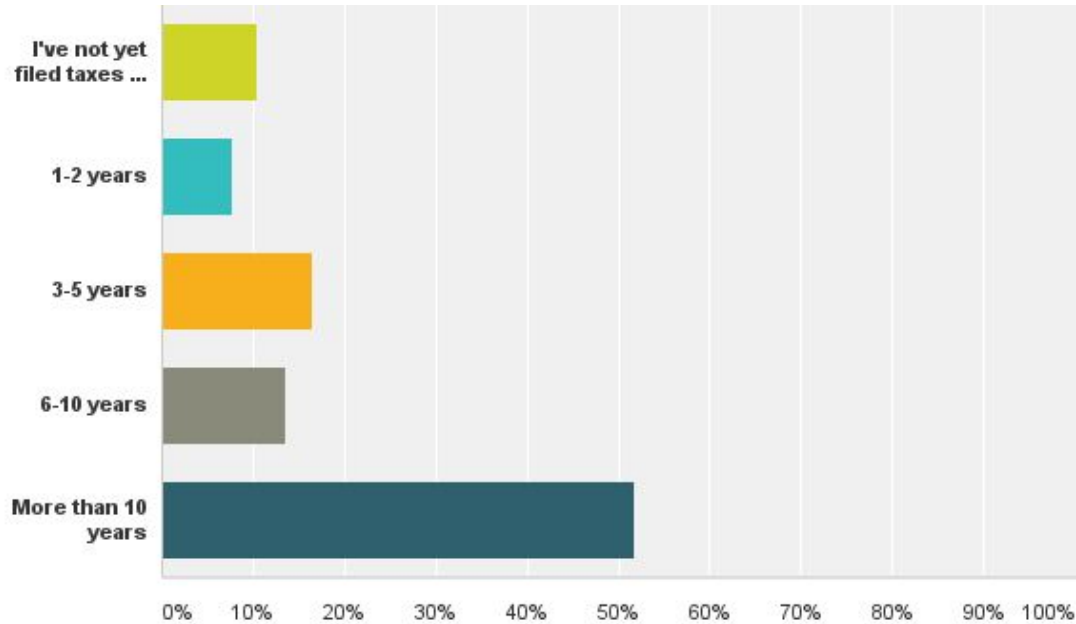
Answered: 501 Skipped: 0

Answer Choices	Responses	
I have a significant concern around a potential audit	3.79%	19
I have a slight concern	29.54%	148
I have no concern	53.69%	269
I haven't thought about it	10.78%	54
Other (please specify)	2.20%	11
<b>Total</b>		<b>501</b>



## Q8: How many years have you filed taxes for your business?

Answered: 501 Skipped: 0



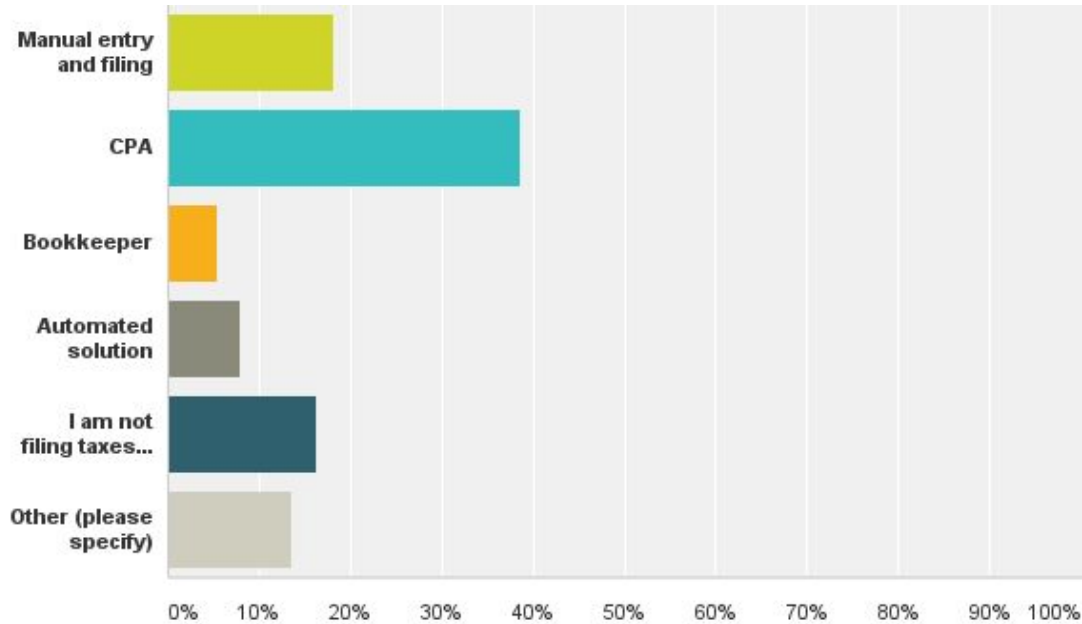
## Q8: How many years have you filed taxes for your business?

Answered: 501 Skipped: 0

Answer Choices	Responses	
I've not yet filed taxes for my business	<b>10.38%</b>	52
1-2 years	<b>7.78%</b>	39
3-5 years	<b>16.57%</b>	83
6-10 years	<b>13.57%</b>	68
More than 10 years	<b>51.70%</b>	259
<b>Total</b>		<b>501</b>

# Q9: How do you handle the filing of your sales tax returns today?

Answered: 501 Skipped: 0



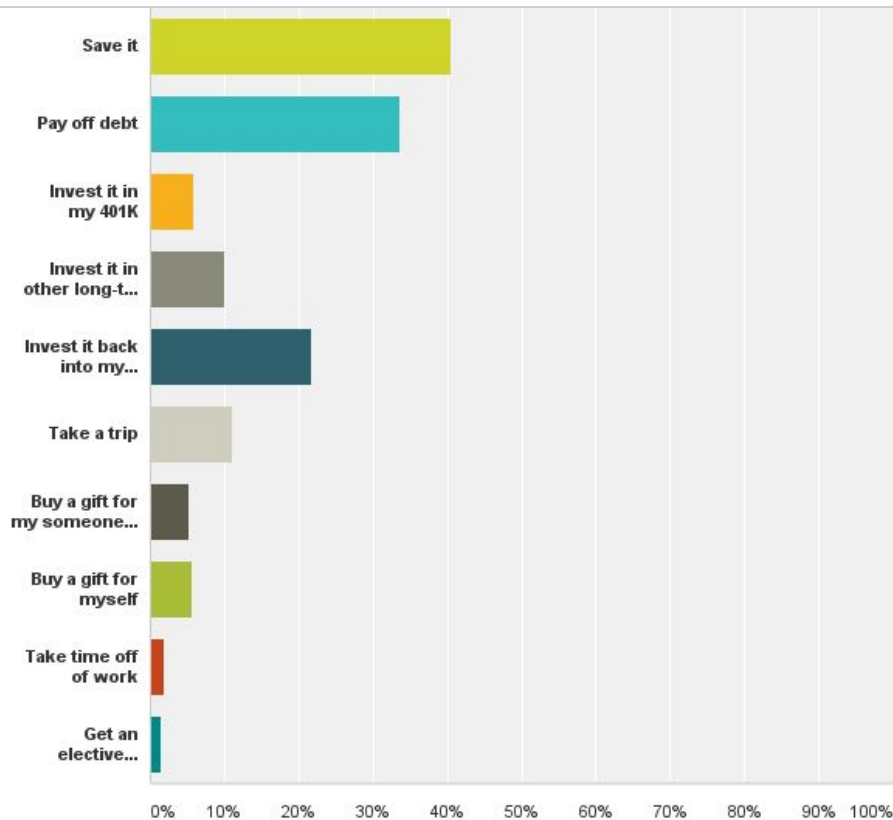
## Q9: How do you handle the filing of your sales tax returns today?

Answered: 501 Skipped: 0

Answer Choices	Responses	
Manual entry and filing	18.16%	91
CPA	38.52%	193
Bookkeeper	5.39%	27
Automated solution	7.98%	40
I am not filing taxes for my business	16.37%	82
Other (please specify)	13.57%	68
<b>Total</b>		<b>501</b>

# Q10: What are you planning to do with your tax (personal) refund (check all that apply)

Answered: 501 Skipped: 0



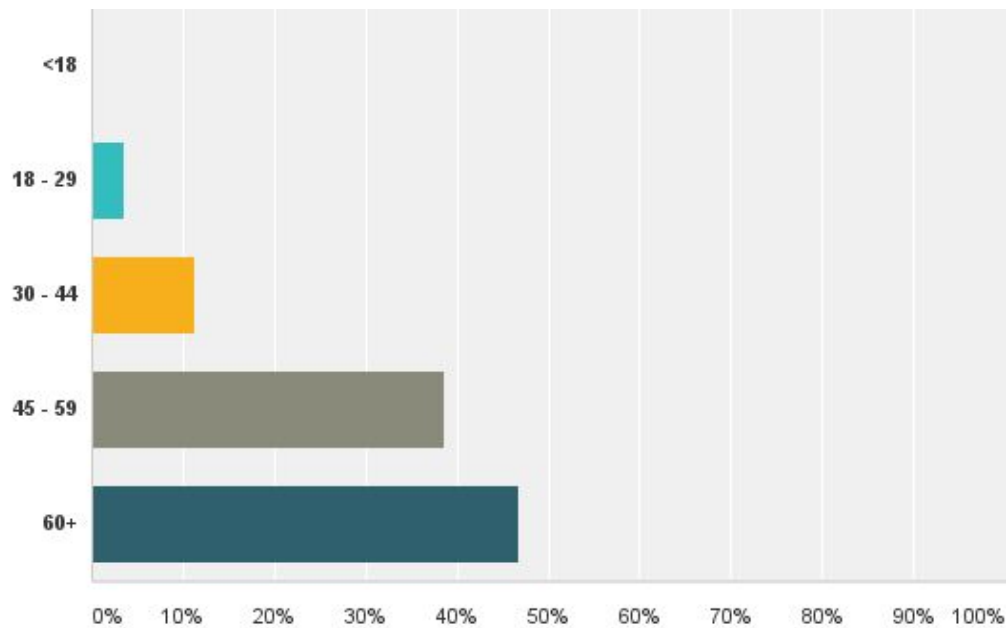
# Q10: What are you planning to do with your tax (personal) refund (check all that apply)

Answered: 501 Skipped: 0

Answer Choices	Responses	
Save it	40.52%	203
Pay off debt	33.53%	168
Invest it in my 401K	5.79%	29
Invest it in other long-term assets	9.98%	50
Invest it back into my business	21.76%	109
Take a trip	10.98%	55
Buy a gift for my someone special	5.19%	26
Buy a gift for myself	5.59%	28
Take time off of work	1.80%	9
Get an elective medical procedure	1.40%	7
<b>Total Respondents: 501</b>		

# Q11: Age

Answered: 501 Skipped: 0



# Q11: Age

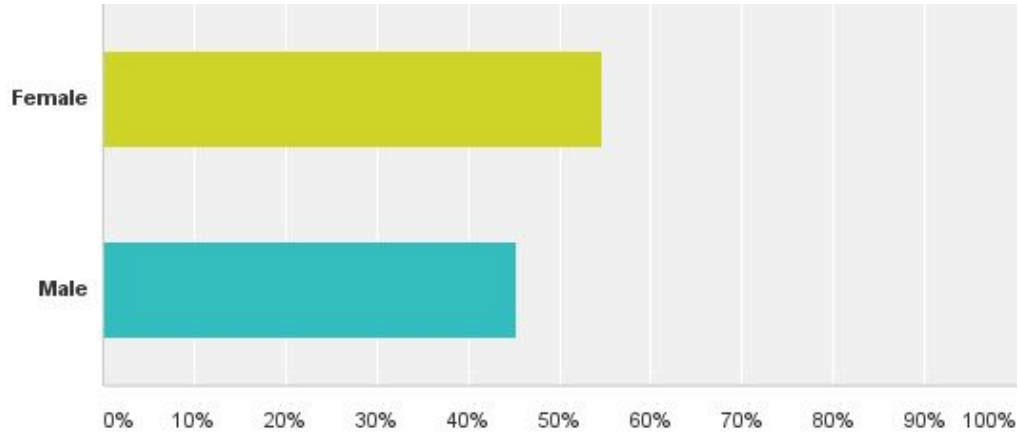
Answered: 501 Skipped: 0

Answer Choices	Responses
<18	0.00% 0
18 - 29	3.59% 18
30 - 44	11.18% 56
45 - 59	38.52% 193
60+	46.71% 234
<b>Total</b>	<b>501</b>



## Q12: What is your gender?

Answered: 501 Skipped: 0



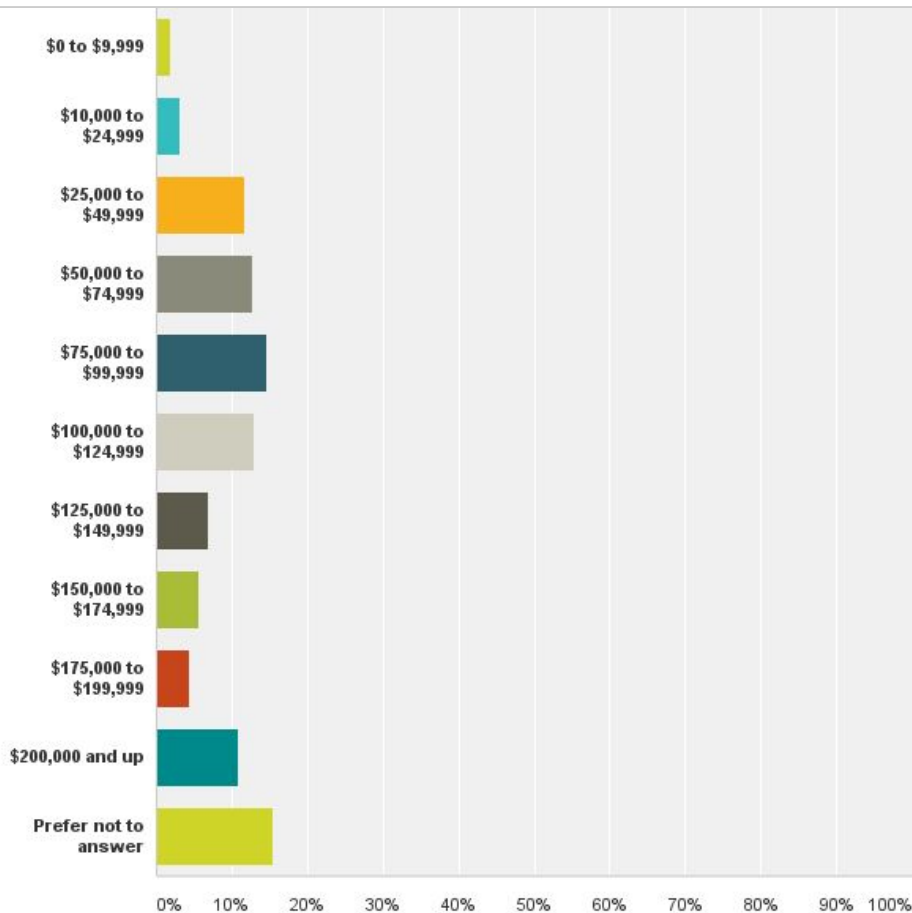
## Q12: What is your gender?

Answered: 501 Skipped: 0

Answer Choices	Responses
Female	54.69% 274
Male	45.31% 227
<b>Total</b>	<b>501</b>

# Q13: How much total combined money did all members of your HOUSEHOLD earn last year?

Answered: 501 Skipped: 0



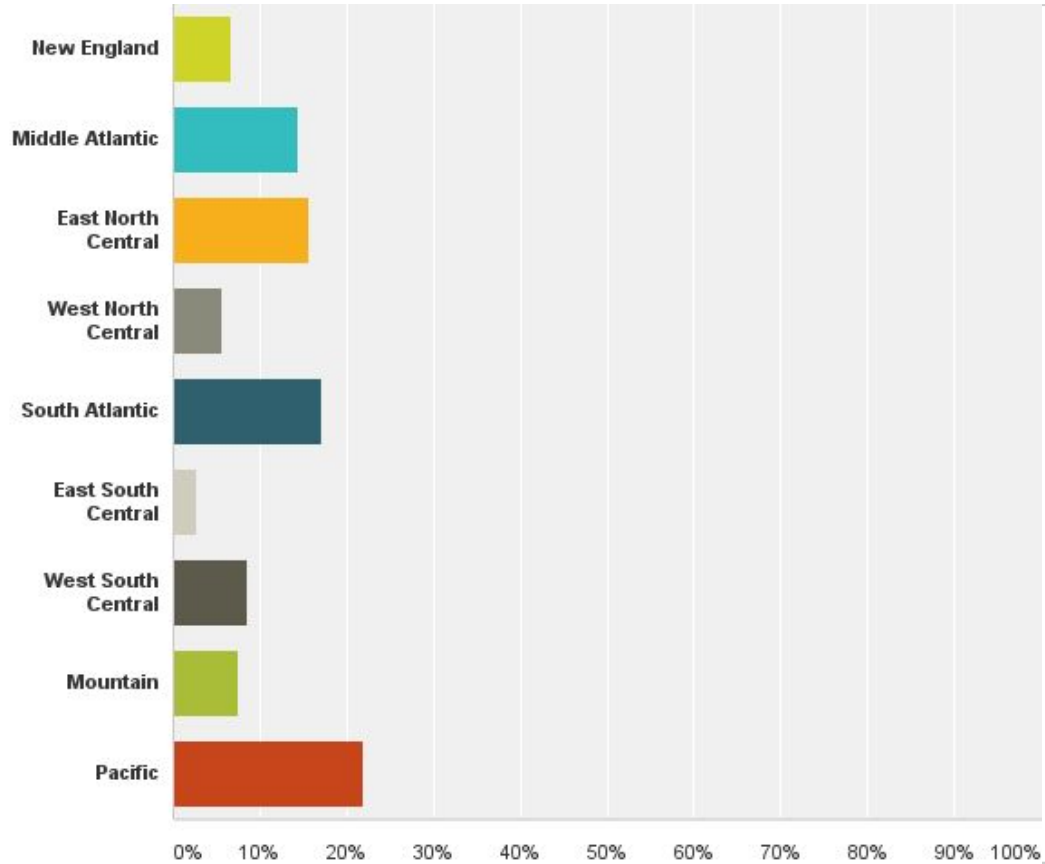
# Q13: How much total combined money did all members of your HOUSEHOLD earn last year?

Answered: 501 Skipped: 0

Answer Choices	Responses	
\$0 to \$9,999	1.80%	9
\$10,000 to \$24,999	3.19%	16
\$25,000 to \$49,999	11.78%	59
\$50,000 to \$74,999	12.77%	64
\$75,000 to \$99,999	14.57%	73
\$100,000 to \$124,999	12.97%	65
\$125,000 to \$149,999	6.79%	34
\$150,000 to \$174,999	5.59%	28
\$175,000 to \$199,999	4.39%	22
\$200,000 and up	10.78%	54
Prefer not to answer	15.37%	77
<b>Total</b>		<b>501</b>

# Q14: US Region

Answered: 495 Skipped: 6



## Q14: US Region

Answered: 495 Skipped: 6

Answer Choices	Responses	
New England	6.67%	33
Middle Atlantic	14.34%	71
East North Central	15.56%	77
West North Central	5.66%	28
South Atlantic	17.17%	85
East South Central	2.63%	13
West South Central	8.48%	42
Mountain	7.47%	37
Pacific	22.02%	109
<b>Total</b>		<b>495</b>