



# Tax Time Thursdays with AARP Foundation Tax-Aide

## *Outreach to Seniors & Older Adults Notes*

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Presented by the Center on Budget and Policy Priorities' Get It Back Campaign

### **Presenters:**

Jackie Lynn Coleman, Senior Director, National Business Operations – AARP Foundation Tax-Aide

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## **EITC Campaign Outreach Pilot Campaign & Tax-Aide Impact – TY2021**

### **Jackie Lynn Coleman**

Shared results of AARP Foundation's funded EITC campaign from last year

- Overview
  - o Pilot locations: Markets in Columbia, SC; Albuquerque, NM; Houston, TX with
  - o Budget: \$88K in funding for awareness campaign
  - o Timing: Jan-April, 2022
  - o Methods used:
    - Awareness media – spreading info about the expanded EITC
    - Engagement media – messaging includes a call to action for the audience
    - Consumer cultivation – understanding audience preferences
- Outcome
  - o Generated 2.2MM total impressions and 1,820 leads
  - o Cost-per-lead was \$51; while this figure is high, it includes all avenues of marketing
  - o Future campaigns will leverage the audience gained through this campaign to fine-tune targeting strategies
- Awareness media
  - o Sponsored news segments, video ads through Connected TV, and banner ads in both English and Spanish
  - o In the future will provide media training for spokespeople who participate in news segments to make sure messaging is consistent
- Engagement channels
  - o Facebook ads, directly mailed postcards, Google ads, AARP newsletter

- Mailers and social media timing are important – plan in advance and begin to distribute/post materials in early January so that people remember this information when they’re planning their tax prep
- Consumer cultivation
  - How to find and consistently engage with the audience
  - Audience characteristics:
    - Most were 45+, nearly half were 55+
    - Most used mobile devices to search
    - Most were female
  - Messaging that is action-oriented performed best: the “make a plan” campaign email was popular and effective due to the call to action

### **Shawn Logue**

- Campaign results
  - Over \$1 billion in total tax refunds claimed
  - Filed 857,271 federal tax returns; 653,013 state tax returns
  - The 2021 EITC expansion boosted returns claiming the EITC
- Expanded EITC claimant characteristics
  - Most filers were 65+ & female
    - This held true for both all-income and lower income brackets
  - Most filers were single filers with no dependents
- Implications of the expiration of the expanded EITC
  - Due to the ended expansion, age, and lack of dependents, these filers are likely to not be eligible for the EITC this year
  - Over 75% are expected to now be ineligible
  - These filers will likely face challenges saving money, paying for food and medications, and dealing with rising housing costs

### **Outreach & Seniors: Key Takeaways**

1. For small budgets, word of mouth is best! Also consider low-cost social media ads.
2. Getting in front of people as a spokesperson is helpful. Share informative materials with churches, senior centers/housing complexes, etc.
3. Consumers are better educated regarding tax scams and can be wary of “free” messaging. Have conversations with people, when possible, to debunk myths. In addition to word of mouth, use messaging from trusted national groups like AARP Foundation Tax-Aide, Consumer Financial Protection Bureau (CFPB), & the Get it Back Campaign.
4. Brag about your free tax services! People want to hear about satisfaction rates, community member experiences, and testimonials from clients and volunteers to understand that free tax preparation is trustworthy. Many people are totally unaware of this service. Sharing this info can help ease concerns about scams and the quality of free services.