

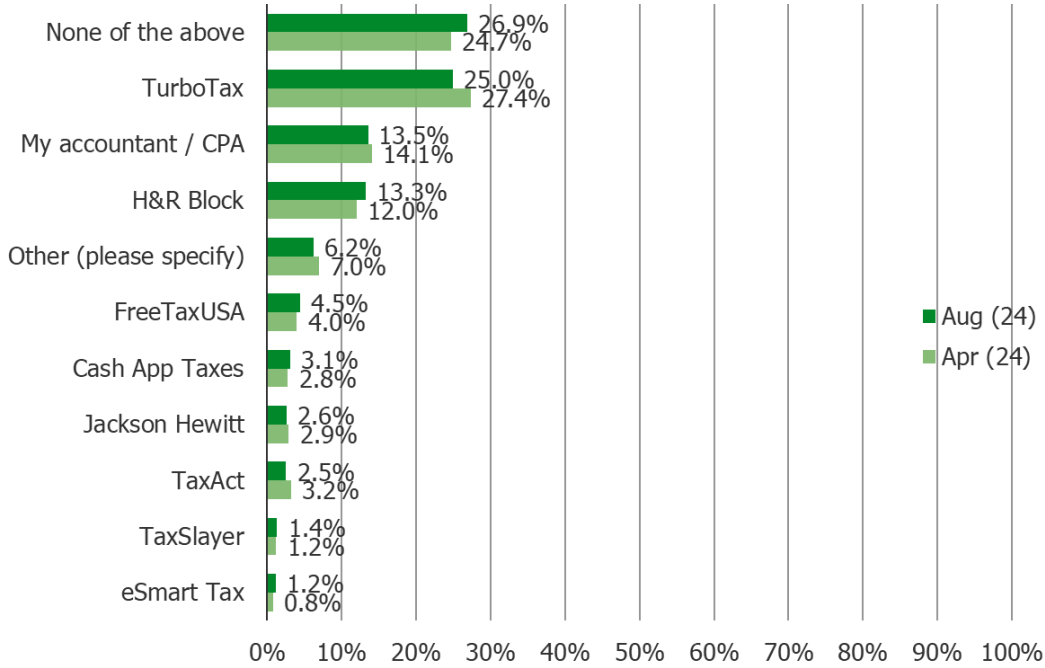
BESPOKE SURVEYS

## Tax Prep Services, Vol 3

1250+ Respondents Per Quarter

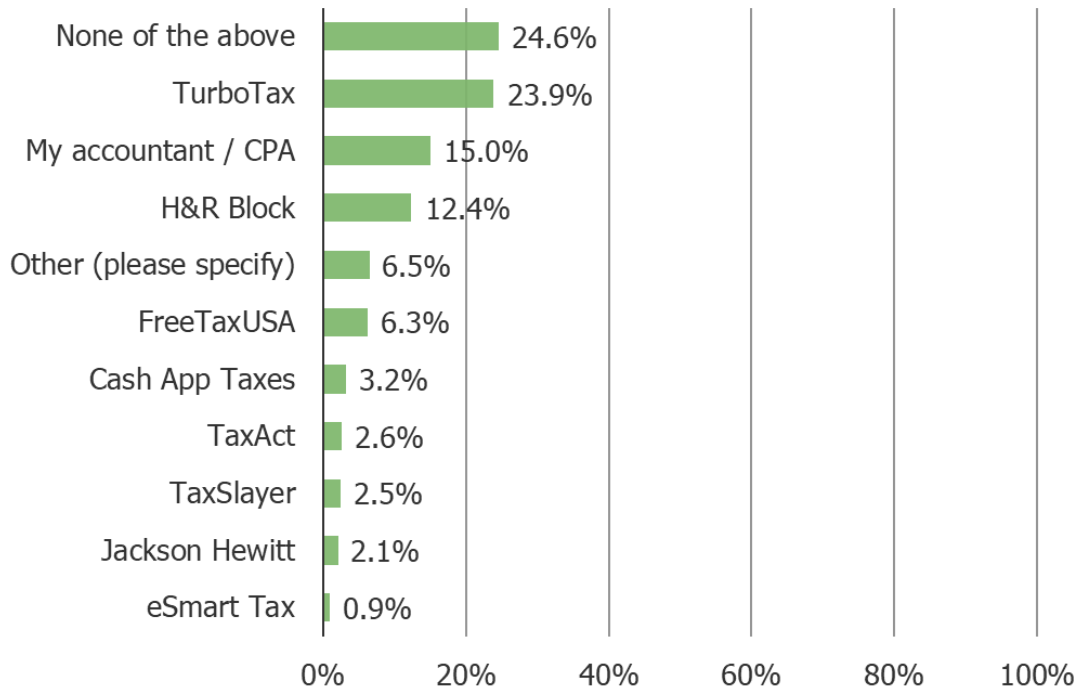
HOW DID YOU FILE YOUR TAXES THIS YEAR?

Posed to all respondents.



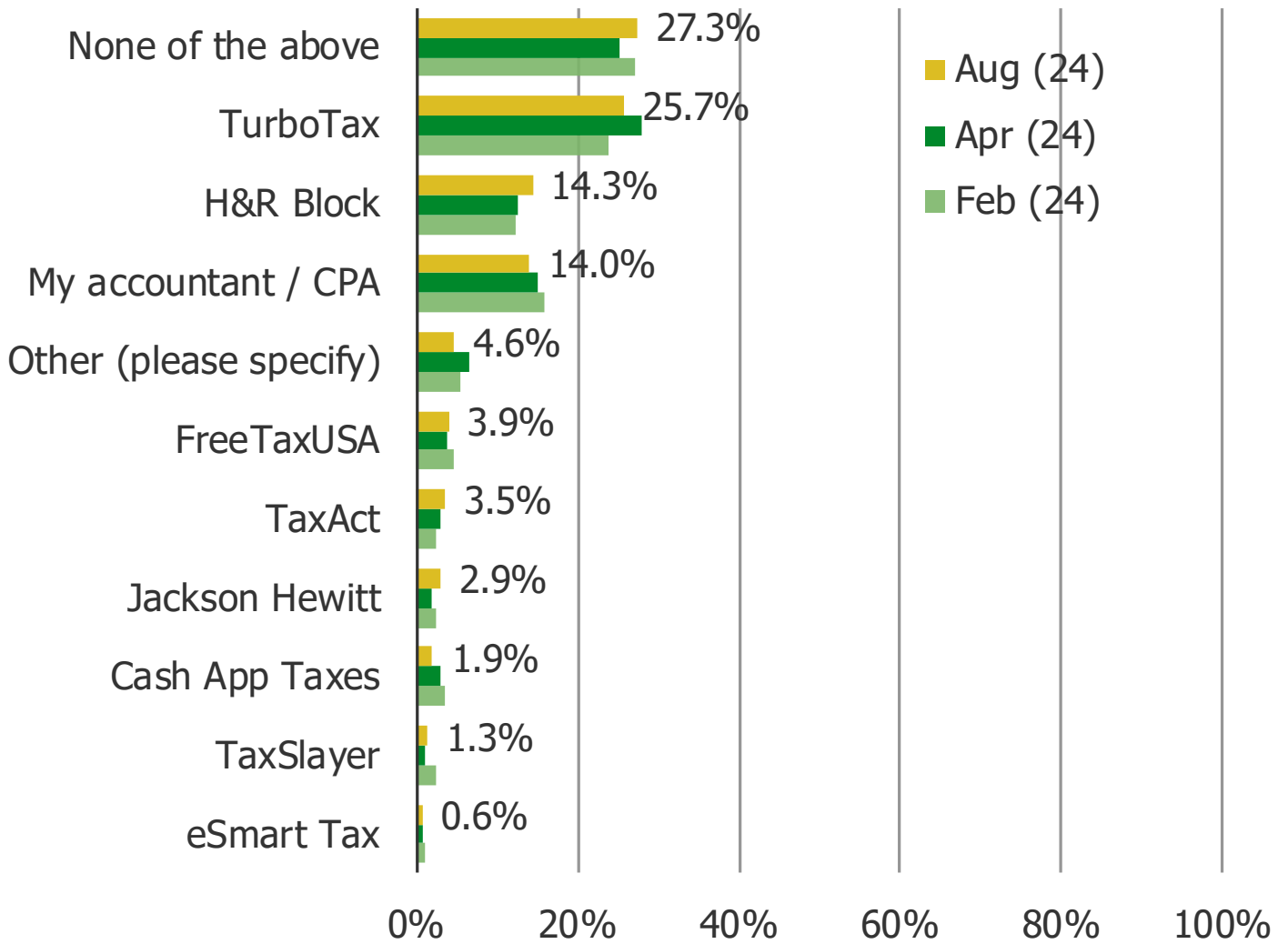
FROM FEBRUARY 2024: HOW WILL YOU FILE YOUR TAXES THIS YEAR?

Posed to all respondents.



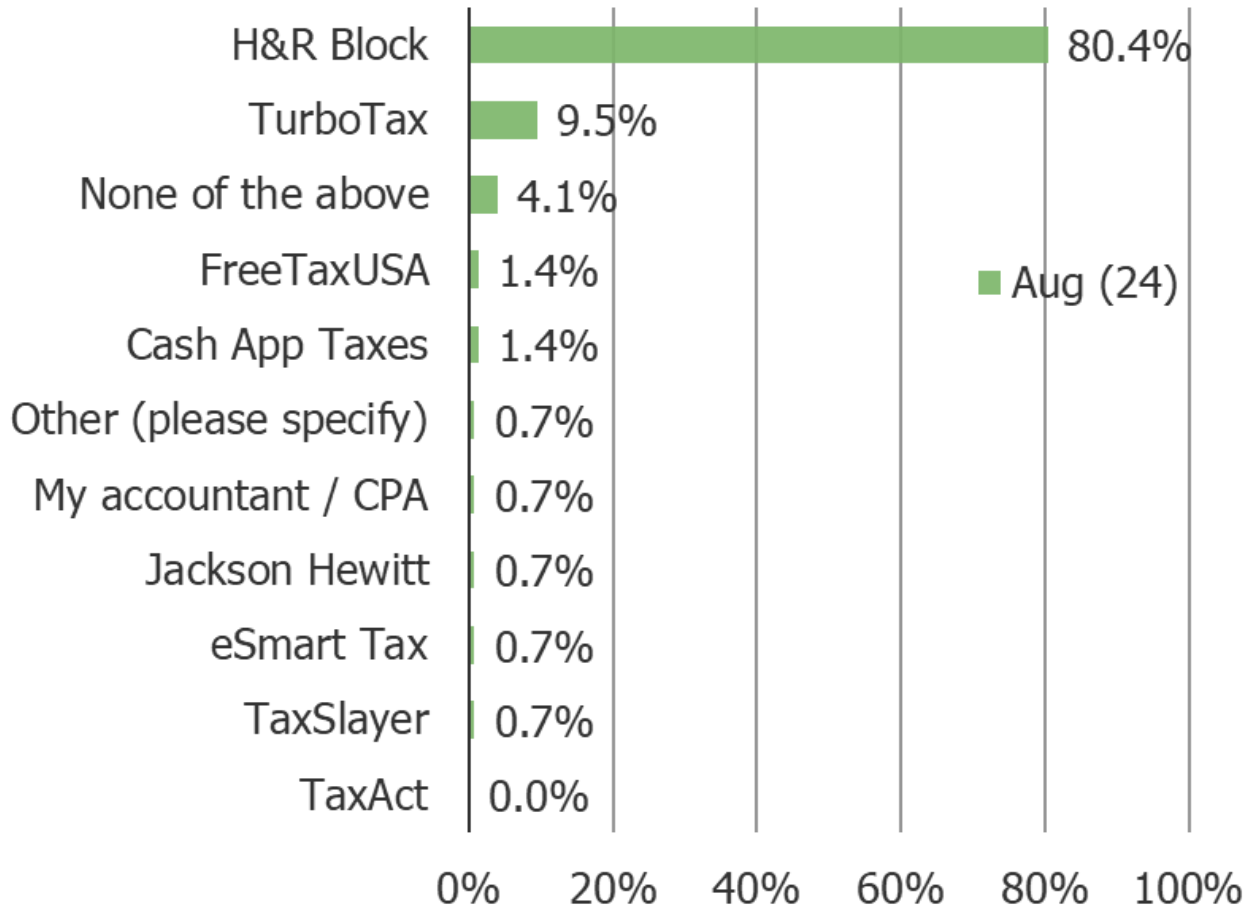
HOW DID YOU FILE YOUR TAXES LAST YEAR?

Posed to all respondents.



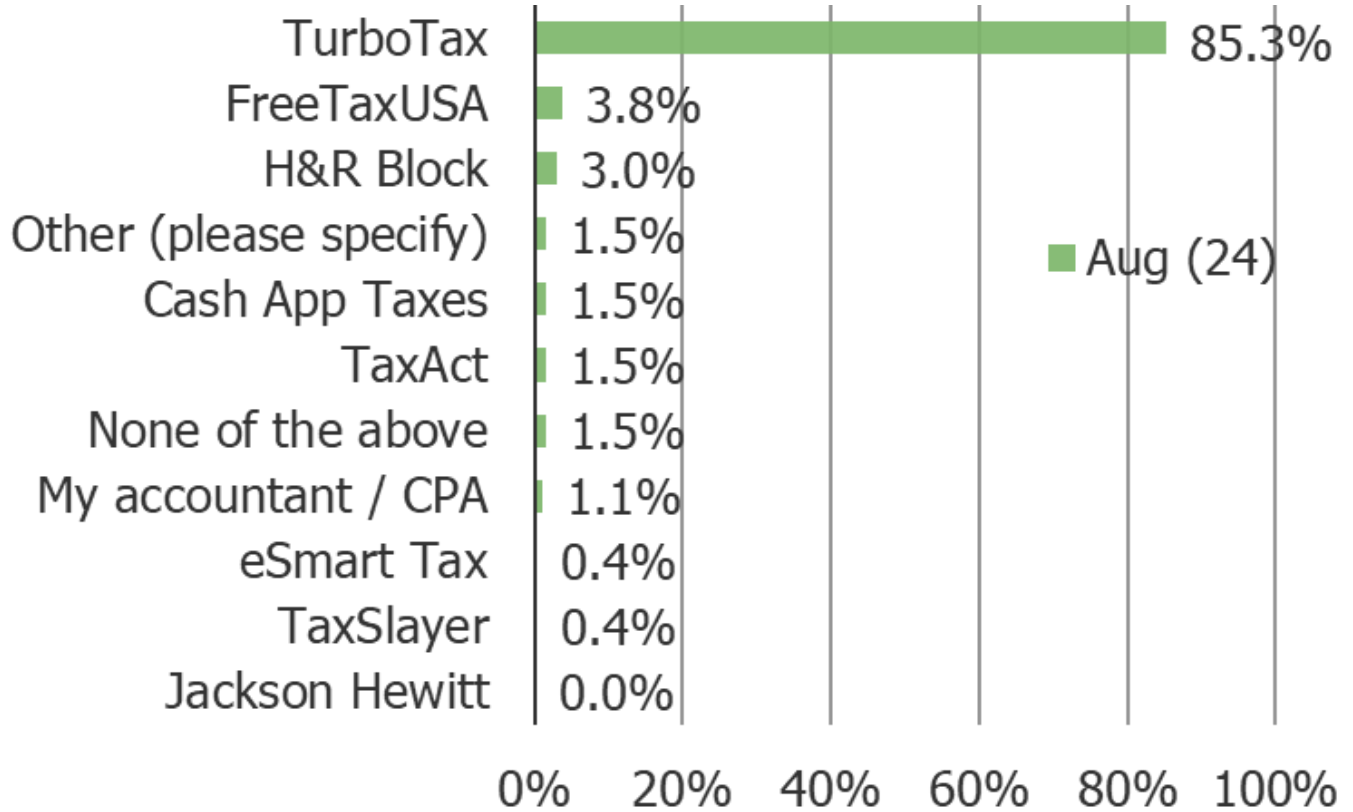
Y/Y RETENTION | USED H&R BLOCK LAST YEAR... WHAT THEY USED THIS YEAR...

Posed to respondents who used H&R Block last year (N = 148)



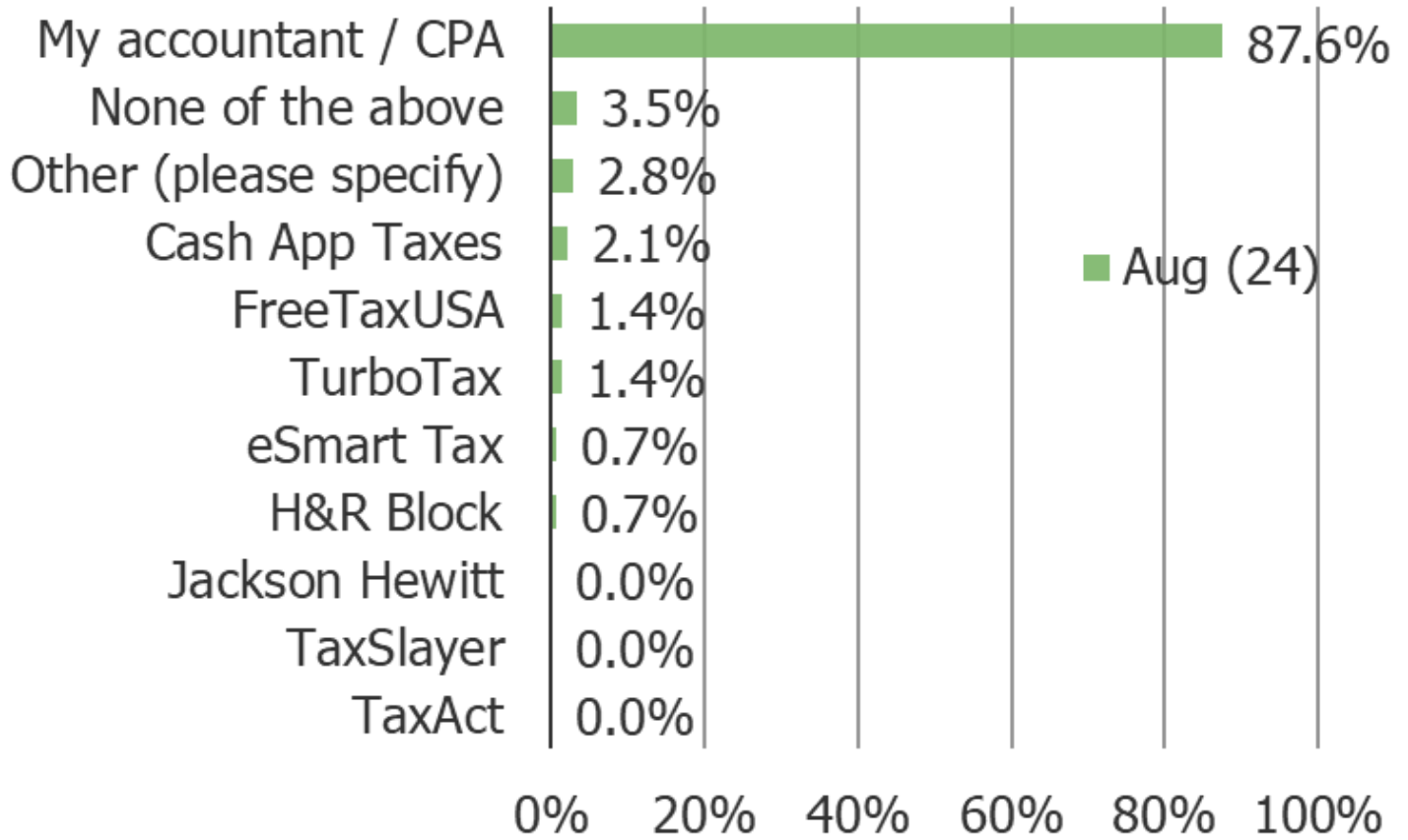
Y/Y RETENTION | USED TURBO TAX LAST YEAR... WHAT THEY USED THIS YEAR...

Posed to respondents who used Turbo Tax last year (N = 266)



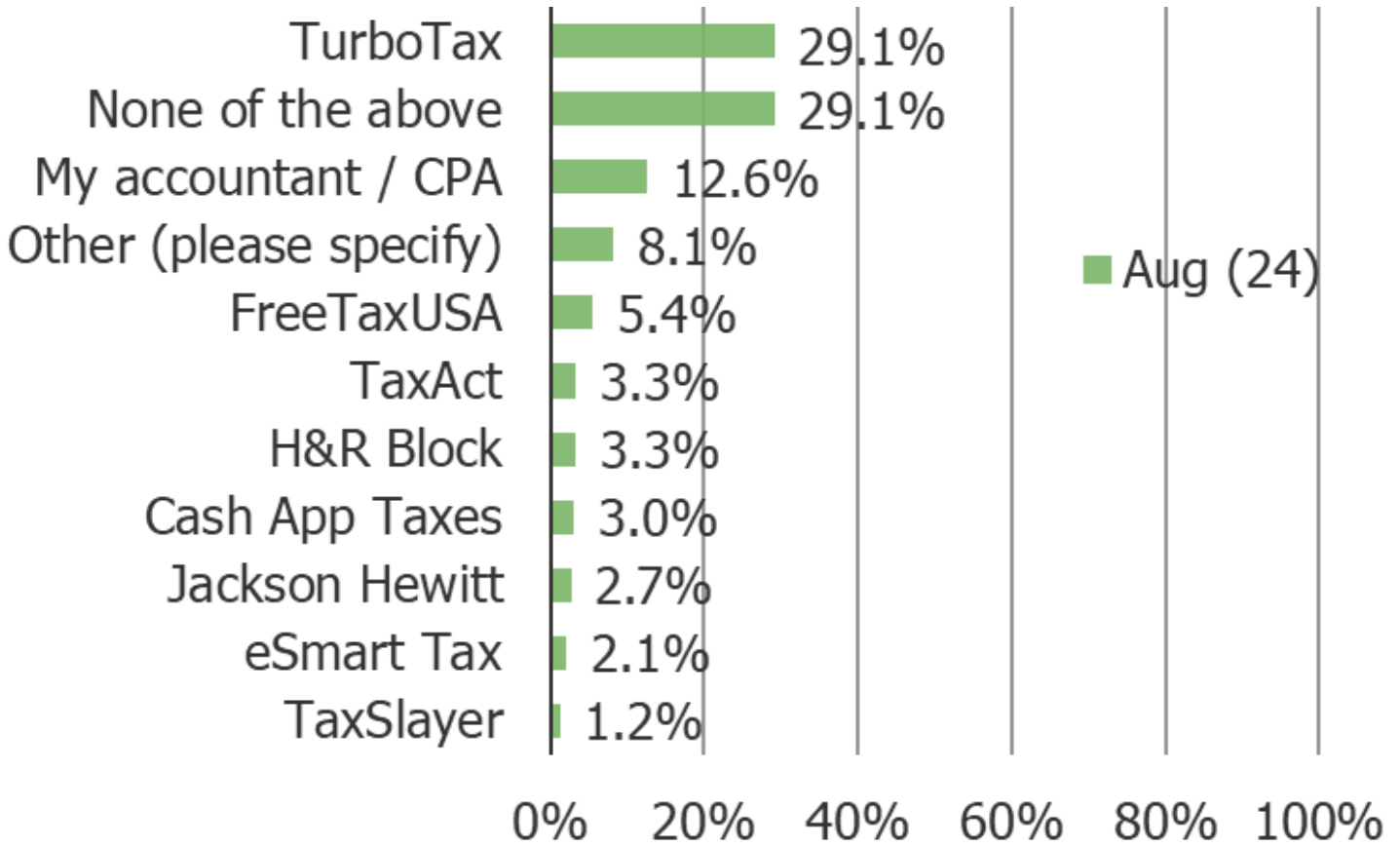
Y/Y RETENTION | CPA LAST YEAR... WHAT THEY USED THIS YEAR...

Posed to respondents who used a CPA last year (N = 145)



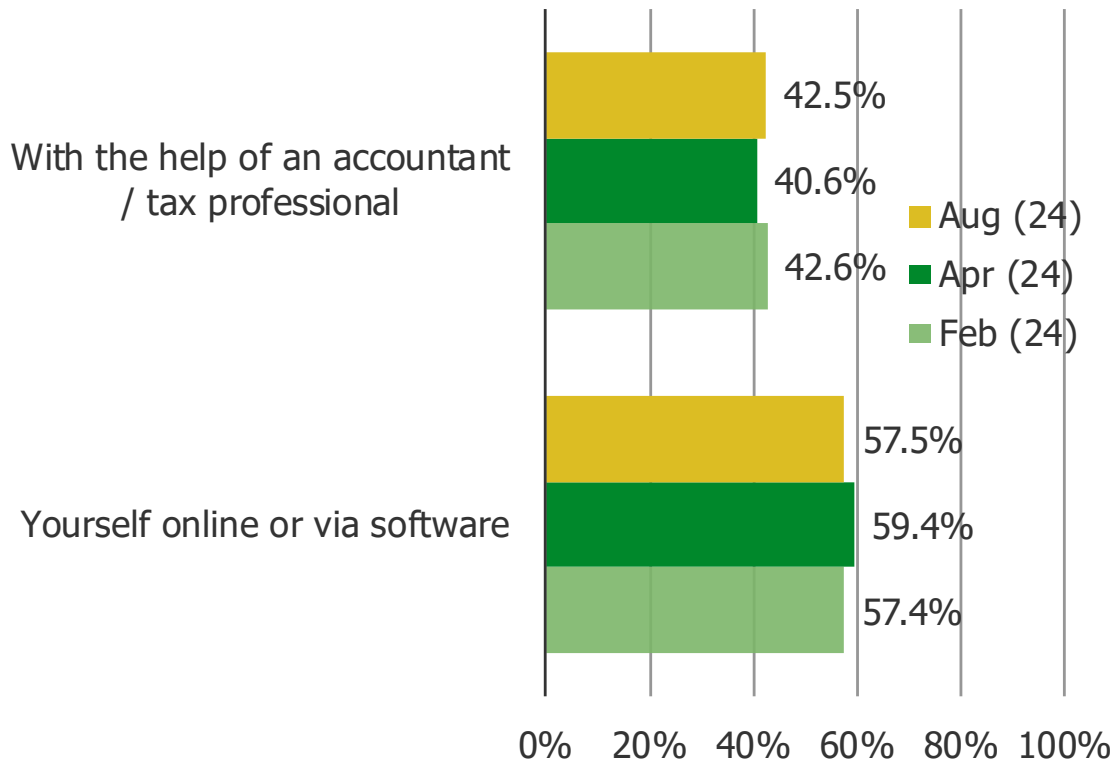
WHO THEY SWITCHED TO: ALL RESPONDENTS WHO HAVE USED H&R BLOCK AT SOME POINT IN THE PAST BUT DON'T ANY LONGER, WHAT THEY USED TO FILE TAXES THIS YEAR

Posed to all respondents.



DO YOU PREFER TO FILE YOUR TAXES...

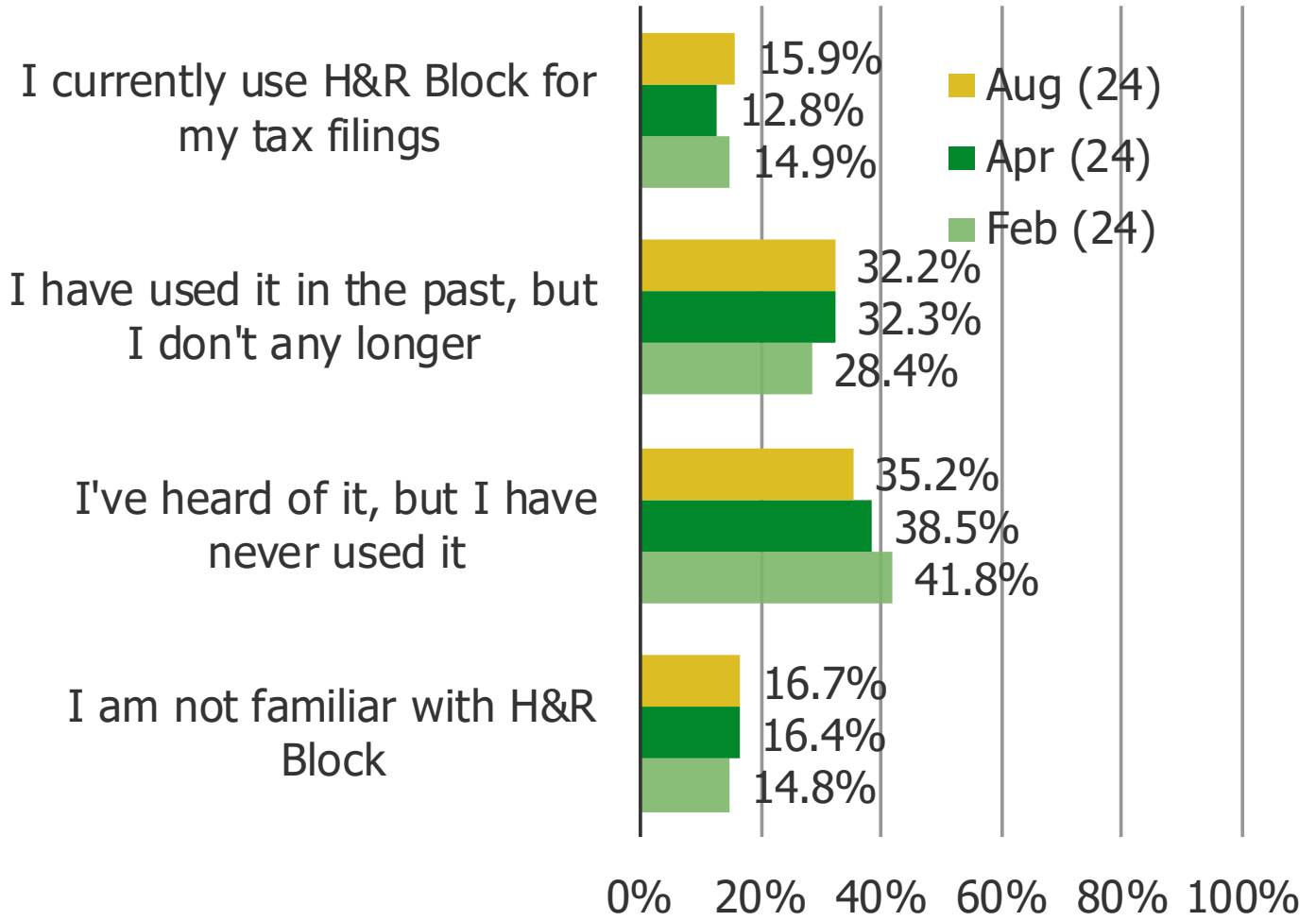
Posed to all respondents.





WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EXPERIENCE WITH H&R BLOCK?

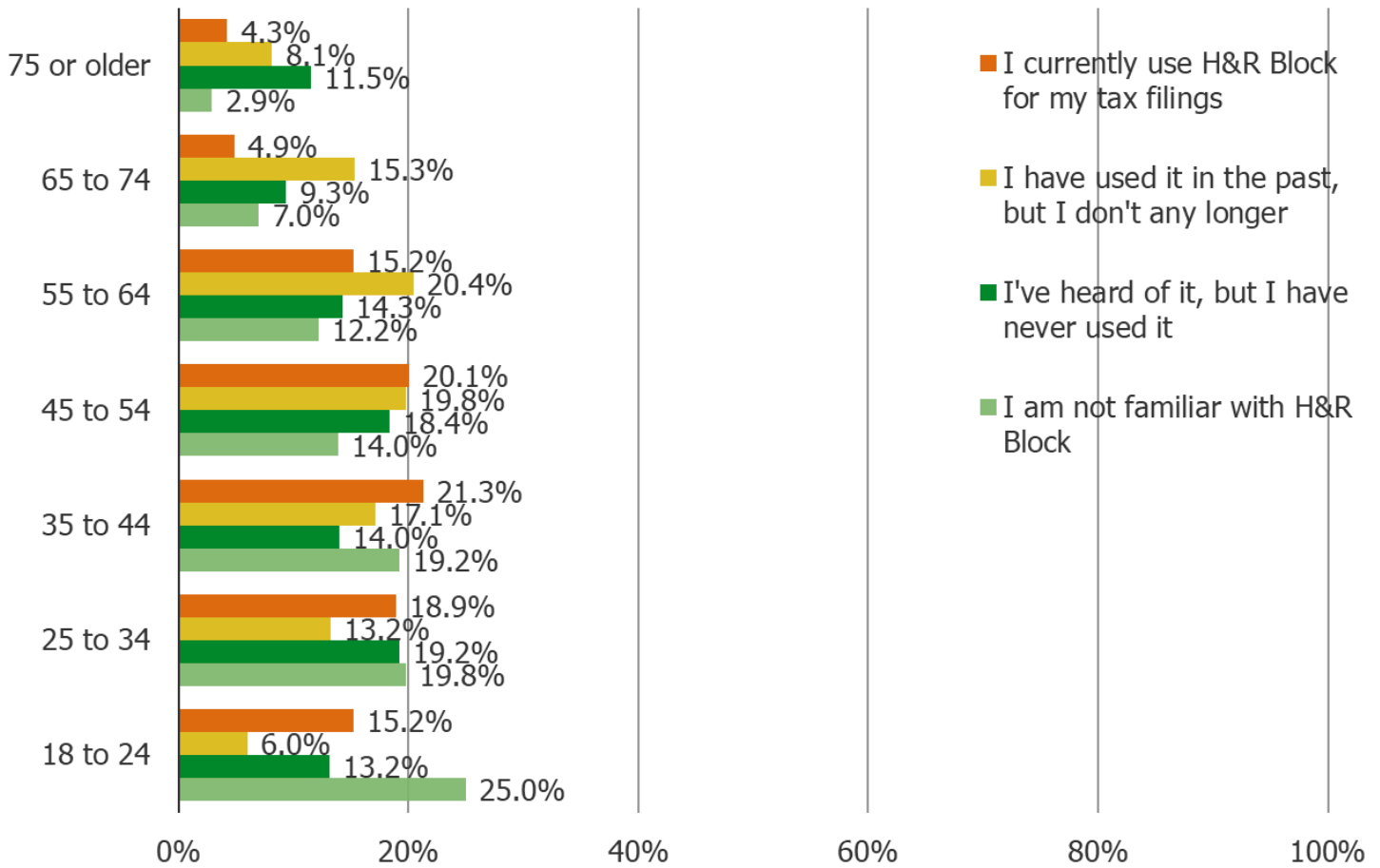
Posed to all respondents.



EXPERIENCE WITH H&R BLOCK, AGE BREAKDOWNS

Posed to all respondents.

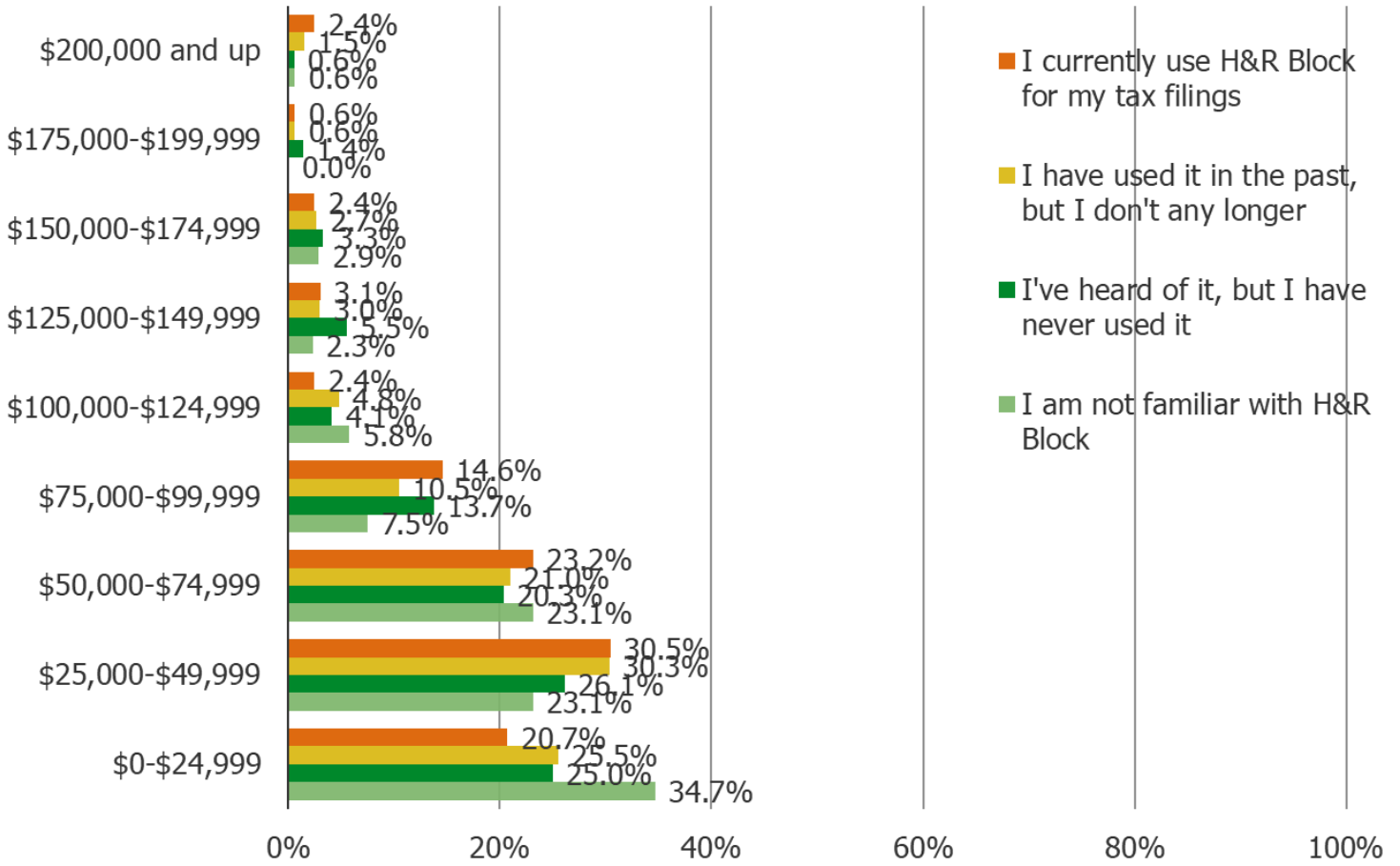
August 2024



EXPERIENCE WITH H&R BLOCK, INCOME BREAKDOWNS

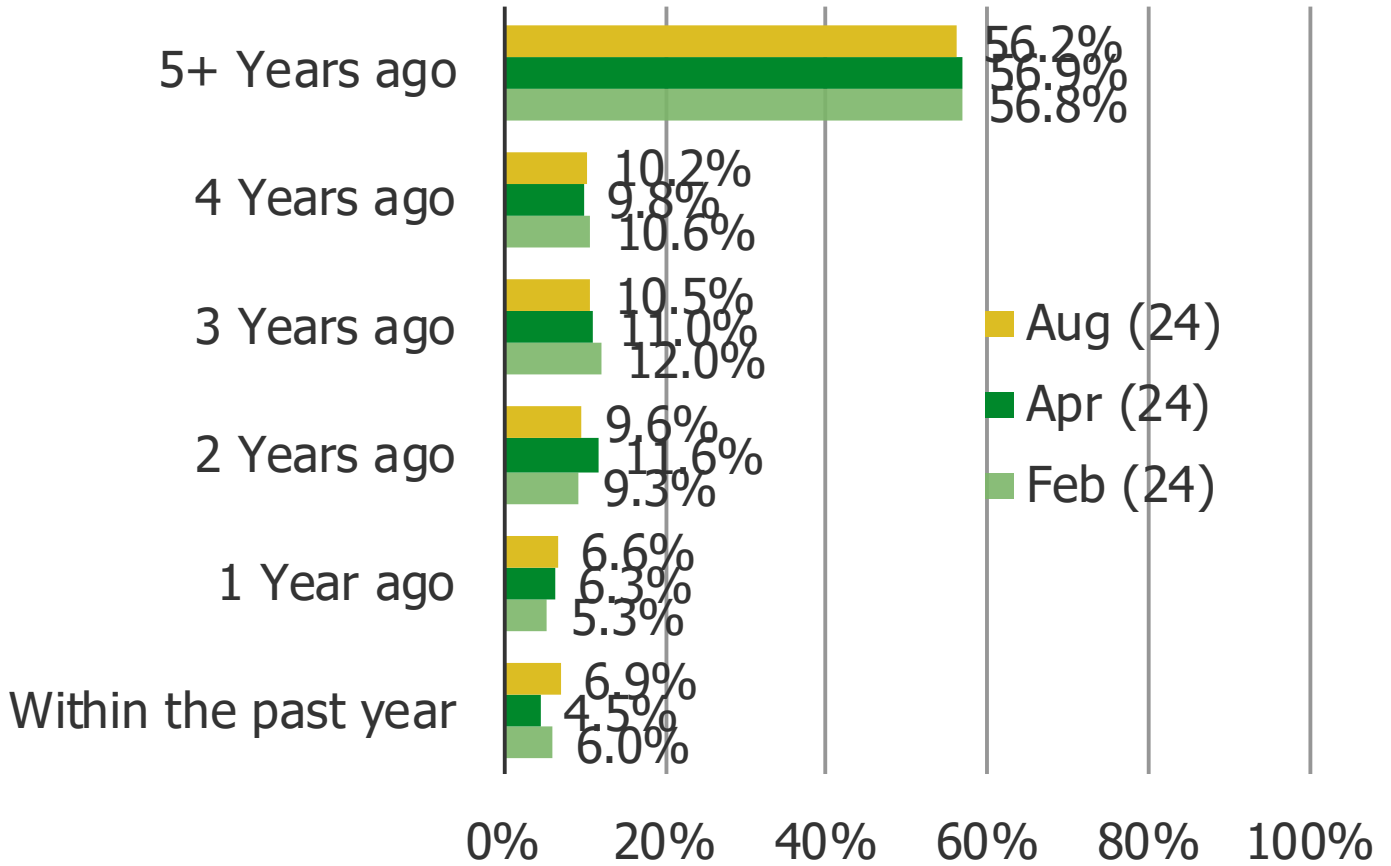
Posed to all respondents.

August 2024



WHEN DID YOU STOP USING H&R BLOCK?

Posed to respondents who used H&R Block in the past, but don't any longer



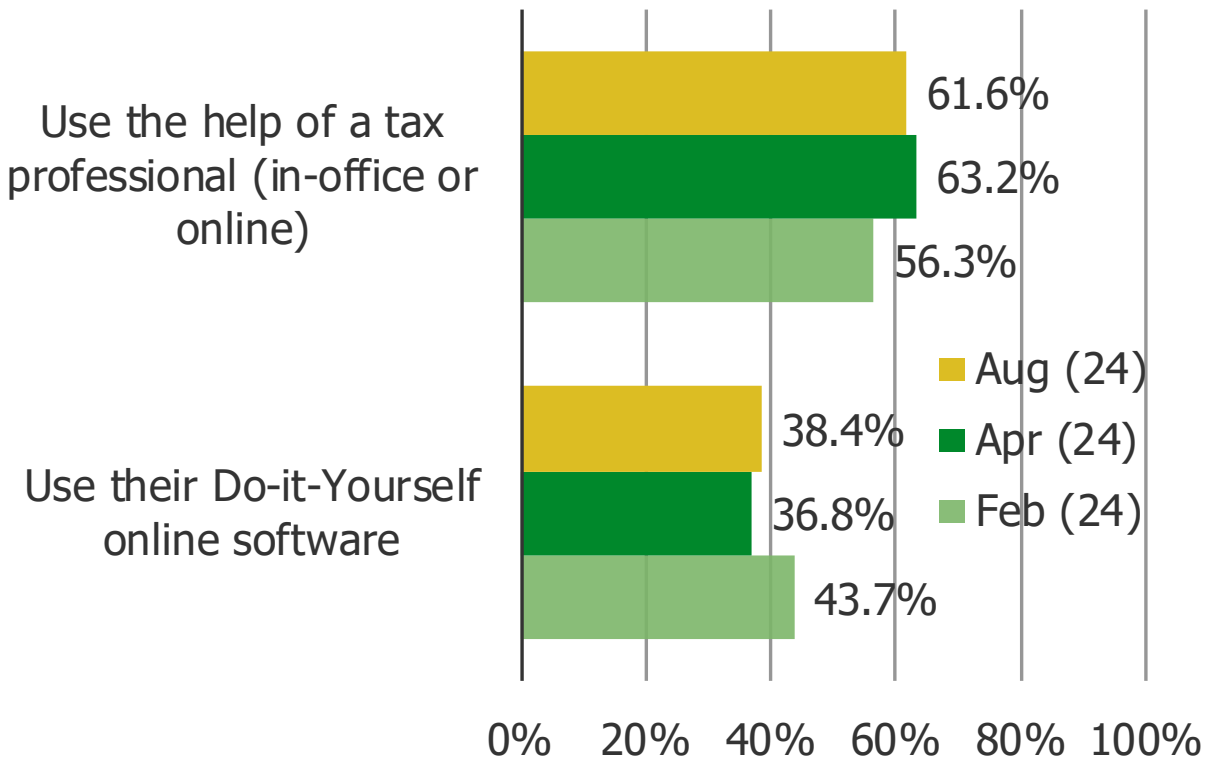
### WHY DID YOU STOP USING H&R BLOCK?

Posed to respondents who used H&R Block in the past, but don't any longer



WHEN YOU USE H&R BLOCK, DO YOU TYPICALLY?

Posed to respondents who use H&R Block currently.



WHY DO YOU USE H&R BLOCK TO FILE YOUR TAXES?

Posed to respondents who use H&R Block currently.

