

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

2 | 23 | 2023



Key Highlights and Takeaways

The screenshot shows a landing page for the AARP Foundation's EITC campaign. At the top, it says "Keep More of the Money You've Earned — Up to \$1,500" and "AARP Foundation is here to help!". Below this is a "Learn More" button. A video player is embedded, showing a woman looking at a laptop. Below the video is a form titled "Get the Details You Need to Get Started" with fields for First Name, Last Name, Email Address, Address (Street, City, State, ZIP Code), and a "Submit" button. The footer includes the AARP Foundation logo and contact information: "© 2022 AARP Foundation, 601 E Street, NW, Washington DC 20049".

Market Focus: Columbia, South Carolina; Albuquerque, New Mexico; Houston, Texas

Budget & Timing: \$88K spent on paid advertising (late January - early April 2022).

Performance: Delivered 2.2MM total impressions and 1,820 leads. A lead was defined as a call to the call center or submission to the landing page. The overall cost-per-lead for paid media was \$51.48.

Awareness Media: Investments in Connected TV, Sponsored News and Banner Ads drove 1.54MM exposures during the campaign.

Engagement Media: General awareness message with a compelling reason to act. A mix of Direct Mail, Facebook, and Google Search drove 1,819 leads, including 1,442 calls to the call center and 378 form submissions.

Consumer Cultivation: Printed asset sent to 689 people and generated 50 downstream calls to the Tax-Aide hotline.

Reaching This Audience: Reaching households with very low income, reduced access to the internet, and less likely to be banked is challenging. Future campaigns: Leverage this year's audience to fine-tune targeting strategies.

Awareness Channels

Awareness Channels – Highlights & Takeaways

Timing & Role: Three types of media were employed to raise awareness of the EITC in key markets. Sponsored news segments ran on broadcast television. Video advertisements, delivered via ConnectedTV outlets, and banner ads were targeted to viewers using a mix of geographic, lifestyle, and demographic criteria.

Sponsored segments and broadcast TV ads end of February to early March. A series of banner ads ran 03/26 to 04/01. Finally, ConnectedTV video ads ran from 03/20 to 03/31.

Performance: Together, awareness ads drove 1.54 MM impressions. Cost per view of \$.04 for Sponsored News and Connected TV. YouTube ads cost anywhere between \$0.03-\$0.30 USD per view.

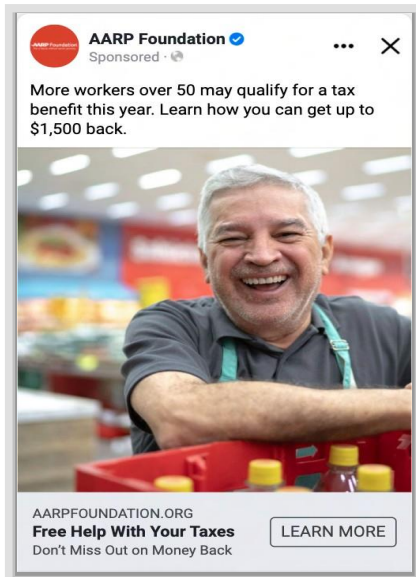
Sponsored News: High level of exposure in both English and Spanish. Community volunteers featured in these news segments lent a voice of authenticity to television spots. Logistics of television required a high level of coordination. Future: select media-ready spokespeople to improve the fidelity and impact of segments.

ConnectedTV: Video ads ran for two weeks in the later half of the campaign. These ads drove significant exposure, but few measurable actions.

Banner Ads: Similar to the ConnectedTV ads, programmatic display ads ran during the later part of the campaign. These ads were a small fraction of total spending but could be a significant lead generator with an increase run time or budget.




Engagement Channels



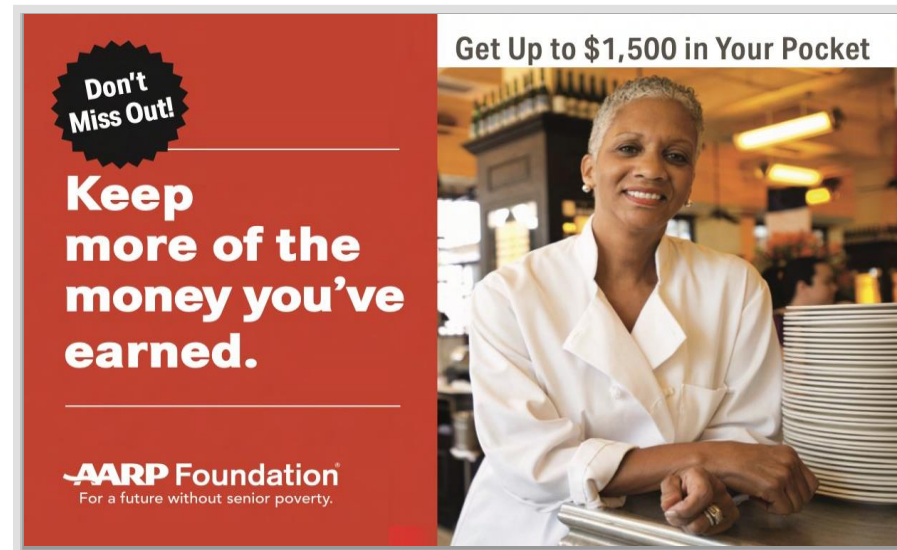
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More workers over 50 may qualify for a tax benefit this year. Learn how you can get up to \$1,500 back.



AARPFUNDATION.ORG
Free Help With Your Taxes
Don't Miss Out on Money Back

LEARN MORE




Don't Miss Out!

Keep more of the money you've earned.

AARP Foundation
For a future without senior poverty.

Get Up to \$1,500 in Your Pocket



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Time is running out for older workers to claim a tax credit and get money back. Act now — the deadline is April 18, 2022.



AARPFUNDATION.ORG
Free Help With Your Taxes
Don't Miss Out on Money Back

LEARN MORE

Engagement Channels - Key Highlights & Takeaways

Timing & Role: We invested in Direct Mail, Facebook, and Google Ads to drive conversions. The timing needed to create the direct mail piece, video, and printed asset required planning and production over the year-end holiday season.

- Direct Mail began arrived in homes on 01/24. Facebook ads launched on 01/28, and Google Search on 02/03. Both Facebook and Google Search ads ended on 04/10.

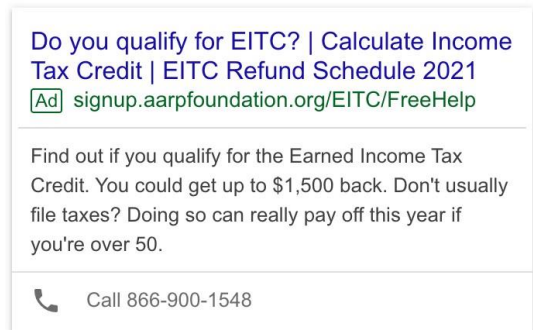
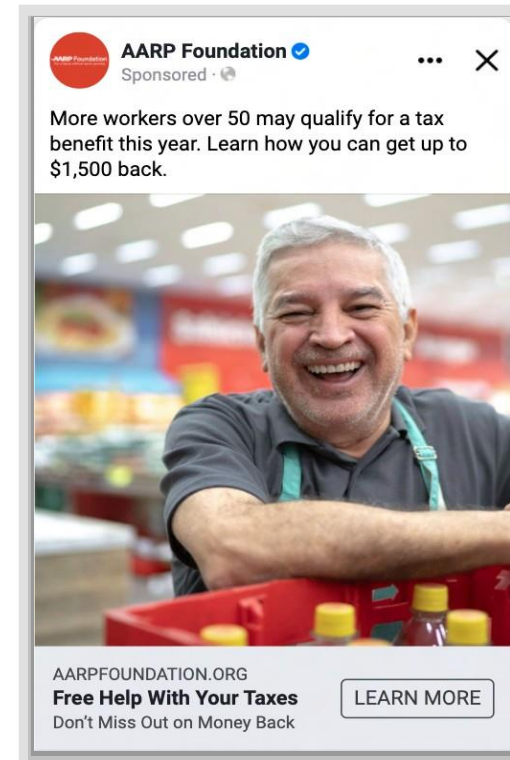
Performance: Direct mail and Google Search ads drove over 80% of all leads, at the lowest cost per lead. Facebook and AARP owned promotions drove a small but significant number of leads.

Google Search: Keywords related to "Free Tax Help/Prep" had had the most impressions, indicating these terms were highly relevant to potential EITC filers. Keywords related to "Tax Locations Near Me" had the highest conversion rate.

Direct Mail: Strong performer. Response rate was highest in Albuquerque. Future: Invest in regression modeling to help select highly likely respondents from the AARP member file and increase performance.

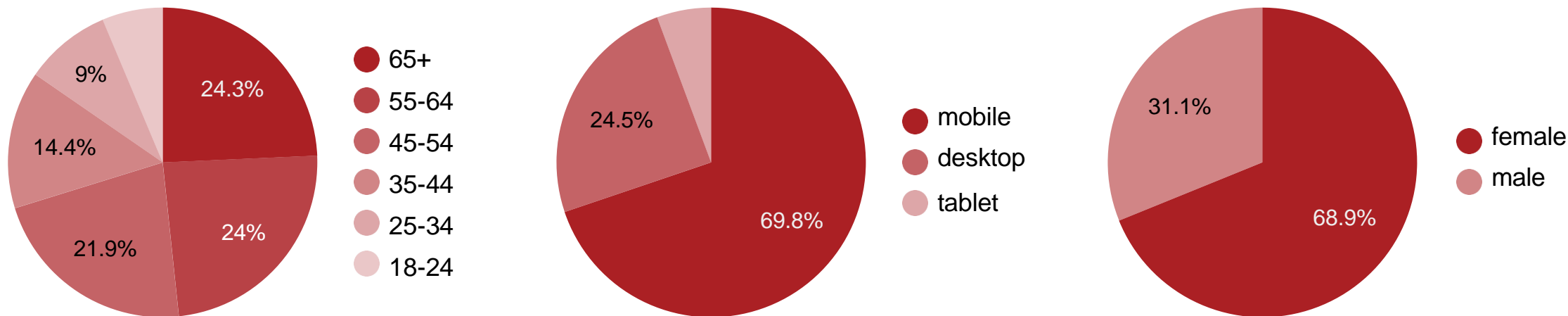
Facebook: While the CTR was comparable to Tax-Aide campaigns, the cost per lead was relatively expensive. In future campaigns, we may be able to leverage the leads from 2022 to create a high performing look-alike audience segment.

AARP Promotions: Owned promotions drove a small but significant amount of leads. Two placements in the Webletter drove the vast majority of exposure and traffic.



Consumer Cultivation

What were the characteristics of landing page visitors?



What were their passions, habits and interests?

Affinities	
1.	Food & Dining/Cooking Enthusiasts/30 Minute Chefs
2.	Lifestyles & Hobbies/Pet Lovers
3.	Media & Entertainment/TV Lovers
4.	Shoppers/Bargain Hunters
5.	Lifestyles & Hobbies/Family-Focused

In-Market For	
1.	Home & Garden/Home Decor
2.	Home & Garden/Home & Garden Services
3.	Apparel & Accessories/Women's Apparel
4.	Autos & Vehicles/Motor Vehicles/Motor Vehicles (Used)
5.	Home & Garden/Home Improvement

How did the “Make a Plan” email perform?

Summary

The email message received very high open and click rates. This deep engagement suggests that the message content and timeliness are highly relevant to the recipient audience.

Operational

Recipients 244

Successful Deliveries 242

Opens

Total Opens 142

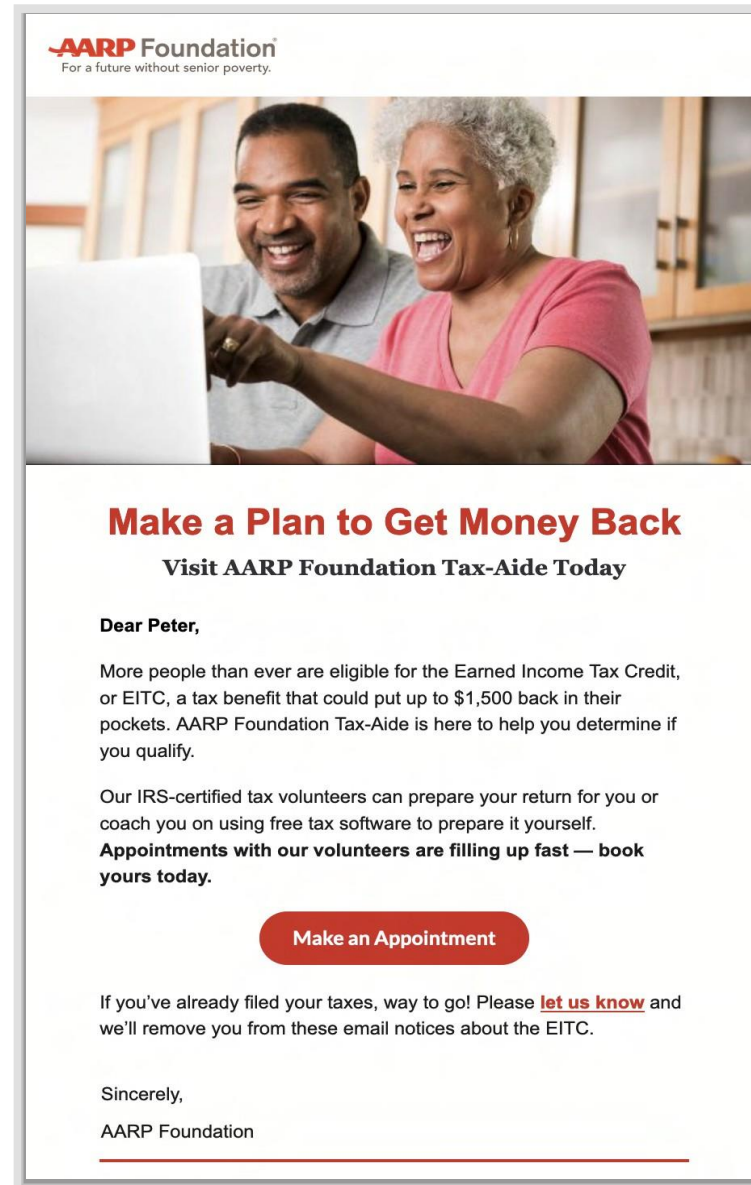
Open Rate 34.8%

Clicks

Total Clicks 31

Click Rate 7.4%

Clicks Per Unique Open 21.2%



How did the “Self File” email perform?

Summary

The email message received an average open rate and a relatively low click rate. This may suggest that the people we have engaged are disinclined to prepare their own taxes and/or that by early April they have already filed their taxes and the self-file offer was of little use to them..

Operational

Recipients 367

Clicks

Total Clicks 9

Successful Deliveries 363

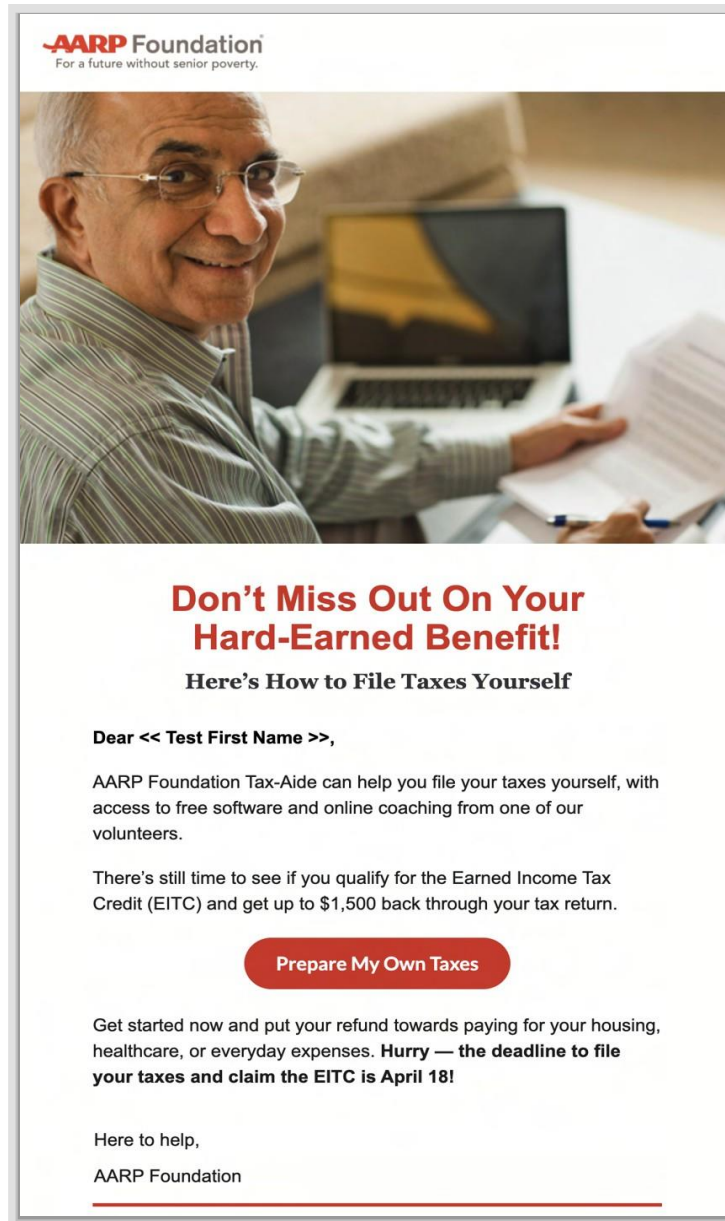
Click Rate 1.9%

Clicks Per Unique Open 8.6%

Opens

Total Opens 109

Open Rate 22.3%



Tax-Aide Results

TY2021 Tax-Aide Results

- **857,271** Federal Returns
- **653,013** State Returns
- **\$1,078,254,577** Total Refunds
 - **\$894,629,979** Federal
 - **\$183,624,598** State
- **\$156,228,337** Total EITC
 - **\$144,616,609** Federal
 - **\$11,611,728** State



Tax-Aide Refund Demographics

Group	All Income Levels		Low Income	
	Total Refund	Average Refund	Total Refund	Average Refund
Age 50-64	\$220,718,712	\$1,792	\$150,426,237	\$1,803
Age 65+	\$657,519,641	\$1,471	\$320,808,821	\$1,224
All Ages				
African American/Black	\$165,643,625	\$1,777	\$104,362,314	\$1,919
LatinX/Hispanic	\$103,480,047	\$2,013	\$67,298,881	\$2,134
Disability	\$218,119,877	\$1,558	\$131,960,772	\$1,409
Female	\$890,028,762	\$1,739	\$503,242,770	\$1,674



Tax-Aide EITC Demographics

Group	All Income Levels		Low Income	
	Total EITC	Average EITC	Total EITC	Average EITC
Age 50-64	\$47,555,906	\$1,246	\$46,527,910	\$1,265
Age 65+	\$57,288,931	\$851	\$50,266,637	\$863
All Ages				
African American/Black	\$31,915,583	\$1,331	\$28,478,913	\$1,454
LatinX/Hispanic	\$19,047,047	\$1,456	\$17,268,013	\$1,582
Disability	\$32,966,929	\$1,031	\$28,892,234	\$1,070
Female	\$126,823,774	\$1,231	\$114,647,490	\$1,309



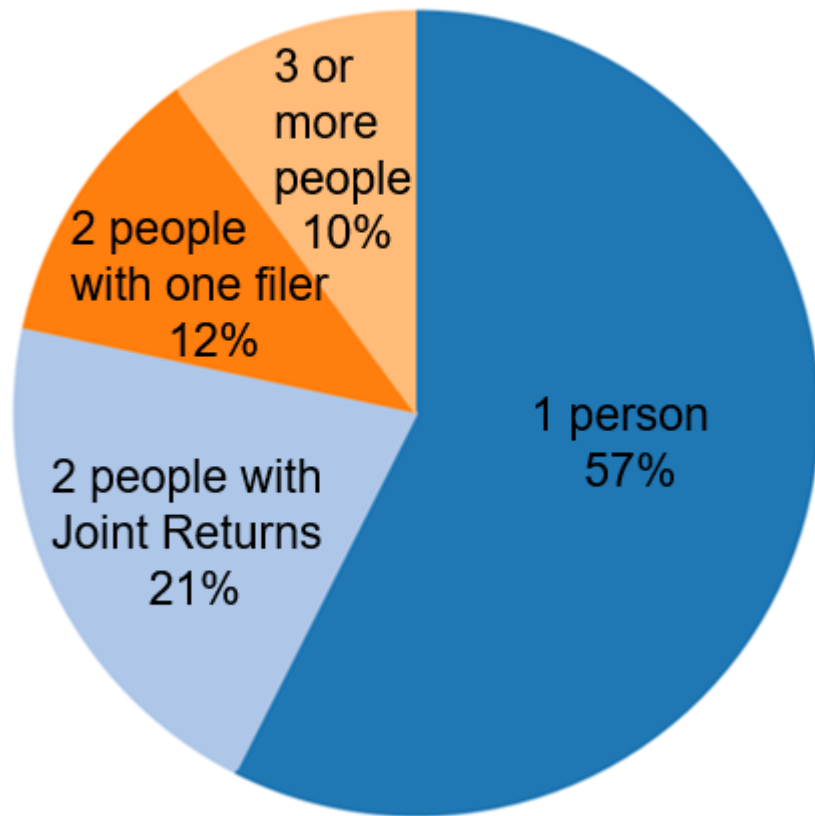
Total EITC



Average EITC

EITC for Age 65+

TY2021 EITC in Age 65+ Households



- **\$57,288,931** EITC for Age 65+ in TY2021
- **\$44,914,522** EITC for Age 65+ 1 person and 2 people with Joint Returns households

Loss of Expanded EITC

- We expect **over 75%** of TY2021 Age 65+ EITC amount from taxpayers not eligible in TY2022
- Those no longer eligible may face challenges
 - Saving money for an emergency
 - Paying for food and medications
 - Dealing with rising housing costs

