2027 YOUNG ONES STUDENT AWARDS
TurboTax

Build awareness of TurboTax's new stores among Prior Year Assisted customers.

AUDIENCE
Prior Year Assisted: customers who used a CPA or tax store (i.e., a form of expert assistance) to have their taxes filed last year (i.e., in the prior tax year). These are established taxpayers, typically older and higher income, managing some combination of tax complexities like a mortgage, children, a rental property, a side gig or small business, and investments.

Due to the complexity of their situations, these customers carry a lot of fear, uncertainty, and doubt about their taxes. They work with an expert to alleviate the worry that they'll get something wrong, either landing them in trouble or costing them money they're owed. Given the high stakes of taxes, deep trust in that expert is paramount. That trust is built on three things: the expert's thoroughness, their personalized attention, and their reliability.

CHALLENGE
TurboTax spent forty years establishing itself as easy-to-use, do-it-yourself software. In recent years we've turned our attention to growing with PYA customers by offering assisted services, including Expert Full Service, where a customer completely hands off their taxes to an expert who prepares, signs, and files the return for them, just as a CPA does.

While our assisted services started as online-only, two years ago we realized that a local presence was critically important to PYA: each year, there are 125M searches for "tax pros near me," **60% of PYA still meet their pro locally, and 65% of TurboTax abandoners want to meet face to face. In the face of this realization, for the first time in our company's history, we started opening physical locations around the country.**

Today, our locations fall into three categories:

- **(4) Flagship stores**: roughly 3,000 sq ft+, in the heart of major cities like NYC, Chicago, and LA, modeled after an Apple Store
- **(~20) Retail stores**: roughly 1,500 sq ft, across the country, modeled after a Verizon store
- **(~600) Expert offices**: small private offices, primarily in shared co-working spaces, most similar to small CPA firms
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Despite that substantial nationwide footprint, most customers still do not know that our stores exist. Aided awareness of TurboTax in-person locations was 24% at the start of the most recent season (October), rose to 29% at mid-season (March), and finished at 26% in April — effectively flat to where we started, despite a brief in-season bump driven by national advertising support.

OPPORTUNITY

Our ambition in going physical is to accelerate awareness, consideration, and trust of our expert services. These locations are elevated, modern, done-for-you spaces, staffed by experts who deliver the same full-service experience, thoroughness, personalized attention, and reliability they expect from their CPA, and designed to earn our brand the kind of trust customers otherwise reserve for traditional CPAs. For a brand that has lived entirely on a screen for four decades, these locations fundamentally change what TurboTax is and what it can offer.

By building awareness of our stores, we can unlock the full power of physical locations to earn the trust necessary to massively accelerate our PYA growth.

SIMPLIFIED BRIEF

Get taxpayers who typically work with a CPA

Who carry a lot of doubt & uncertainty when it comes to navigating the complexity of their taxes along so look for a tax professional near them but never think to look for TurboTax

To realize that TurboTax now has experts in their neighborhood who can file their taxes start to finish

By proving that a modern, elevated TurboTax store is now open near them, staffed by qualified tax experts.

CONSIDERATIONS

- **Markets**: New York, Los Angeles, Chicago, and Dallas are our priority DMAs (Designated Market Area — a geographic group of U.S. counties, anchored by a major city or metropolitan area, with similar local television, radio, digital viewing patterns). Ideas can extend nationally, but consider how the work might focus on these key markets.
- **Channels**: Look beyond traditional media to non-traditional channels and formats. We have a robust brand campaign and traditional linear/streaming/OLV media plan that will already be in market at this time.
- **Brand Campaign**: Our brand campaign, "Now This is Taxes," will be in market for a third year.
- **Tone**: Don't position the CPA as a villain. This audience respects their accountant, and work that mocks them insults the customer we're trying to win.
- **Timing**: Ideas should anchor during tax season (Jan – Apr 15) but can extend throughout the rest of the year. Stores will be open year-round so if an idea drives awareness and consideration of their presence outside of tax season, we are open to exploring as well.
- **Budget**: There are no limitations.

ADDITIONAL RESOURCES/INSIGHTS

Things TurboTax has done in the past to drive awareness of stores:

- 2026 TV "Open Doors" commercial
- 2026 WWE "Tax Pain the Musical" partnership

Additional Context:

- Download

CATEGORIES

By default, each brief will be open to all categories/disciplines, however, TurboTax has noted specific interest in responses for an **Integrated Campaign** (fully integrated 360 campaign).