

Methodology Report

2016 AARP New York Baby Boomer and Gen Xer Retirement Preparedness Survey

The Siena College Research Institute (SRI), on behalf of AARP, conducted a telephone survey of 806 New York State residents from July 25 – August 16, 2016. Residents between the ages of 36 and 70 were interviewed from within all regions in New York State so as to ensure a representative statewide sample. The margin of error for the total sample of 806 is +/- 4.1% including the design effects resulting from weighting with a 95% confidence interval. This means that in 95 out of every 100 samples of the same size and type, the results we obtain would vary by no more than plus or minus 4.1 percentage points from the result we would get if we could interview every member of the population. The overall sample of 806 was weighted by age, gender, reported race/ethnicity, education and region to ensure statistical representativeness. The sample was divided into two quota groups by age to achieve a sample of 401 residents in the Generation X cohort (those between the ages of 36 and 51) and 405 residents in the Baby Boomer cohort (those between the age of 52 and 70). The margin of error for the “Gen X” sample of 401 is +/- 5.9% and the margin of error for the “Boomer” sample of 405 is +/- 6.3% including the design effects resulting from weighting with a 95% confidence level. The Gen X and Boomer samples were each weighted independently by age, gender, reported race/ethnicity, education and region to ensure statistical representativeness.

Nature of the Sample (New York State Residents 36-70 years of age)		
	Unweighted	Weighted
Male	46%	48%
Female	54%	52%
Gen X (age 36-51)	50%	52%
Boomer (age 52-70)	50%	48%
White	70%	61%
African American	15%	14%
Hispanic	9%	15%
Other	5%	8%
High school or less	17%	37%
Some college	29%	27%
Bachelors’ degree or higher	53%	35%
New York City	39%	40%
Suburbs	25%	25%
Upstate	36%	35%

Nature of the Sample (New York State Gen X Residents)		
	Unweighted	Weighted
Male	47%	49%
Female	53%	51%
Age 36 to 43	37%	45%
Age 44 to 51	59%	51%
White	63%	56%
African American	16%	15%
Hispanic	11%	18%
Other	7%	9%
High school or less	14%	32%
Some college	27%	27%
Bachelors' degree or higher	58%	40%
New York City	43%	40%
Suburbs	27%	24%
Upstate	30%	36%

Nature of the Sample (New York State Boomer Residents)		
	Unweighted	Weighted
Male	45%	47%
Female	55%	53%
Age 52 to 60	40%	55%
Age 61 to 70	57%	42%
White	76%	65%
African American	14%	13%
Hispanic	6%	12%
Other	2%	8%
High school or less	20%	40%
Some college	32%	28%
Bachelors' degree or higher	47%	32%
New York City	35%	43%
Suburbs	23%	27%
Upstate	42%	30%

Respondents were contacted via landline or cell phone. The design of the landline sample was conducted so as to ensure the selection of both listed and unlisted telephone numbers, using random digit dialing. The cell phone sample was drawn from a sample of dedicated wireless telephone exchanges from within New York State. Respondents were screened for residence in New York State. There were a total of 234 respondents who completed the survey on a cell phone and 572 who completed it on a landline.

The primary supplier of the RDD landline and cell phone samples was Survey Sampling International (SSI) of Shelton, Connecticut. Additionally, for the cell phone sample we utilized SSI's Smart Cell Sample which enabled the targeting of cell phone sample by age and ethnicity. The database included the billing address associated with the telephone number. In addition to the ability to target cell phone sample, utilizing this database allowed the inclusion of non-New York telephone numbers as someone may have moved and their billing address is in the area but their cell phone number is not a 'typical' New York telephone number (meaning not a NY area code). Again, all of these respondents were screened for residence in the qualifying area before continuing.

Calls were made between the hours of 1pm and 9pm Monday through Thursday, and between 2pm and 8pm on Sundays. Up to 7 calls were placed to each phone number to try to establish if the phone number was a working number.