



Methodology Report: AARP Survey of Registered Voters in Georgia

April 2023

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Introduction

This survey was conducted by ANR Market Research Consultants on behalf of AARP. The purpose of this study is to better understand voter opinions on retirement savings and a state-facilitated savings option.

For more information about the content of this study, including the questionnaire and results, please either visit the project page located here www.aarp.GAsaves or contact the project lead: Jennifer Sauer at jsauer@aarp.org.

Survey Statistics in Brief

Mode(s) of data collection	Cell and landline
Total number of completed surveys	601
Margin of Error (this does not include the design effect)	± 4.0 pct pts
Response Rate (AAPOR RR3)	2.1%
Cooperation rate (COOP3)	82.2%

Sampling

For this study, 601 registered voters residing in Georgia ages 21 to 64 were surveyed. A total of 300 interviews were completed by landline, and 301 were completed via cell phone.

In the United States, cell phone numbers are identified by thousand block groups (the first six digits of a phone number excluding nation code). For this study cell phone numbers were randomly sampled from these thousand groups. Landline numbers that were ported (reassigned) to cell phones were identified using Neustar. Cell phone numbers were dialed manually to comply with the Telemarketing Consumer Protection Act of 1991 (TCPA, 47 U.S.C. 227).

A dual-frame, probability-based sample of telephone records was used for this study. Landline and cell phone sampling were used for this research, with the sample drawn randomly from a list of Georgia registered voters ages 21-64 (as of January 2023), purchased from Aristotle. Birthdate and raw age were included in the sample purchased from Aristotle, which were used to code age in the sample. A total of 35,133 records were utilized. Note that persons without a telephone could not be included in the random selection process. The list of 4,984,204 total registered residents ages 21-64 was randomly divided into 4,985 replicates of 1,000 records for telephone dialing. Initially, 20 replicates were released for calling, with additional replicates

being opened as necessary. In all, 36 replicates representing a total of 35,133 resident records were dialed to complete this study. No quotas were established for this survey.

Screeners questions were used to determine and confirm age, residency, voter registration, and employment in a private sector job or unemployed and looking for work.

Fielding

The study was launched on January 18, 2023 and closed on February 2, 2023.

The survey was conducted by interviewers under the direction of Braun Research, Inc. (BRI).

Interviewing was active between 5:30 p.m. and 9:00 p.m., with some additional calling done between 10:00 a.m. and 4:00 p.m. If necessary, up to 6 call attempts per telephone number were made to reach an eligible respondent. All numbers were called at multiple times of the day as well as days of the week to maximize each respondent's opportunity for inclusion in the study.

Interviews were conducted in English only.

Call management included specific actions based on the call attempt disposition. If there is a no answer, interviewers disposition these calls specifically as 'no answer,' and are dialed when the number comes back up. We typically set 24 hours between 'no answer' calls. After n=4 attempts and still a no answer, we disposition this as final as a no answer.

If there is a busy signal, the number is dispositioned as 'busy.' We typically set 24 hours between 'busy' calls. After n=4 attempts and still a busy, we disposition this as final as a busy.

If we receive an answering machine, we leave a message. We typically set 48 hours between 'answering machine' calls. After n=4 attempts and still an answering machine, we disposition this as final as an answering machine. We typically leave messages on the first and third call. The answering machine message for this project in Georgia is below (separated by landline v. cell).

Landline: Hello, this is _____ calling from Alan Newman Research, a national opinion research firm. We are not telemarketers and are not trying to sell you anything. We are interested in your thoughts about retirement security issues in Georgia. I know I have reached your answering machine. I will try you back another time. Thank you!

Cell: Hello, this is _____ calling from Alan Newman Research, a national opinion research firm. We are not telemarketers and are not trying to sell you anything. We are interested in your thoughts about retirement security issues in Georgia. I know I have reached your cell. I will try you back another time. Thank you!

Only live callers were used, and cell phone numbers were dialed by hand. All interviewers were supervised and monitored.

The final disposition report is located in Appendix A.

Cooperation Strategies

Respondents were not offered an incentive for taking part in the surveys.

Those initially refusing to participate in the survey were given a second effort before dispositioning as a refusal. We always use a senior-level interviewer or supervisor to make the refusal calls, and the typical rest period between calls is a week.

Survey Response, Completion and Conversion Rates

A total of 35,133 sampling units were attempted. The following are the AAPOR compliant outcome rates associated with this study:

- The response rate is defined as the AAPOR RR3 response rate. See https://www.aapor.org/AAPOR_Main/media/publications/Standard-Definitions20169theditionfinal.pdf for a detailed definition. The response rate for this survey is 2.1%.¹
- The cooperation rate for this survey is 82.2% and is defined as AAPOR COOP3, the number of completed interviews divided by the number of contacted, eligible sample units.
- The refusal rate for this survey is 1.5% and is defined as AAPOR REF2, the proportion of all potentially eligible sample units that refuse to participate or break off the interview (estimated using 'e').
- The contact rate for this survey is 3.8% and is defined by the number of completed interviews plus the number of refusals, partially completed, and other contacted sample units divided by all sample units that are eligible or estimated to be eligible (estimated using 'e').

¹ The quantity 'e' is estimated by the following formula: $e = \text{Complete} + \text{Terminate Early} + \text{Confirmed Household No Answer, Busy, and Answering Machine} + \text{Callbacks} + \text{Language Barrier} / \text{Complete} + \text{Terminate Early} + \text{Confirmed Household No Answer, Busy, and Answering Machine} + \text{Callbacks} + \text{Language Barrier} + \text{Government/Business} + \text{Non-Working} + \text{Screened Out} + \text{Over Quota}$.

For more information see the Final Disposition Report in Appendix A.

Weighting

Rake weighting procedures were used to weight the sample by age, gender, and race/ethnicity according to the 2023 state voter database statistics.

Margin of Error and Design Effect

We calculated the margin of error at 95% confidence as $\pm 4.0\%$.

$MOE = 1.96 \times \sqrt{.25/(n - 1)}$, where n is 601

MOE = 4.0%

No design effect was calculated or included in the estimates of standard error.

Sampling error is only one of many potential sources of error in this study. There may be other unmeasured error (e.g., measurement error or nonresponse bias) in this or any other public opinion poll.

Ensuring Data Quality

Braun Research, Inc. (BRI) has over 200 telephone interviewers, all working remotely. Supervisors are able to monitor interviewers from a central system/platform. Monitoring occurs on all telephone projects in the field; BRI assigns monitoring staff during day and evening shifts, thus permitting monitoring supervisors to listen directly to live calls. All interviewers are thoroughly briefed and trained to follow the script verbatim – to read or not read text where instructed as well as to probe or not probe as indicated. The screener and questionnaire are reviewed in detail with each interviewer prior to starting fielding. Each supervisor listens closely to the interviewers to ensure that the script is being followed correctly and to re-brief anyone in case it is noticed that an interviewer needs some additional instruction during the course of his or her calling efforts. If a respondent asks to have a question or response option re-read, for instance, the interviewers are trained to do so. If a respondent asks what a question means, BRI's interviewers are trained not to explain but to pose a question back to the respondent, 'what does it mean to you?' If respondents are hesitant to participate, BRI teaches interviewers to remind respondents that there are no right or wrong answers, that this is an opinion survey only, etc. BRI's interviewers are fully trained to be professional, sensitive, courteous,

knowledgeable, and friendly. A number of BRI's interviewers have also completed human subjects training.

For further quality control and oversight, ANR staff conducted a 1-hour monitoring session on the first day of fielding to listen to live interviews and provide any feedback to the supervisor to relay to the interviewers assigned to the project. After completion of this live monitoring session and detailed review of the data collected on the first evening of dialing, the full launch proceeded.

In addition to ANR's quality checks, BRI's Quality Control (QC) Department reviews all data thoroughly throughout fielding. This includes checks for accuracy and respondent honesty, and the QC Department scrutinizes tabulations, appraises quotas, inspects script outputs, trains interviewers, tests surveys before going into the field, monitors phone interviewers, does verifications (10% of completed interviews), and briefs the team on best practices.

Appendix A: Final Disposition Report

Final	
FULL COMPLETES	601
SCHEDULED_CALLBACKS	7,198
CALLBACK_NON_SPECIFIC	4,799
SOFT REFUSAL	380
HARD REFUSAL	45
TERMINATED_EARLY	93
GOVERNMENT_BUSINESS	24
LANGUAGE_DEAF	8
SCREENED_OUT	1,792
OVER_QUOTA	0
NON_WORKING_NUMBERS	3,403
BUSYS_UNCONFIRMED	0
BUSYS_CONFIRMED_HH	329
NO_ANSWERS_UNCONFIRMED	0
NO_ANSWERS_CONFIRMED_HH	5,001
ANSWERING_MACHINE_SERVICE_UNCONFIRMED	7,215
ANSWERING_MACHINE_SERVICE_CONFIRMED_HH	4,228
PRIVACY MANAGER	12
FAX	5
TOTAL	35,133