AARP in New Mexico Survey of Registered Voters Ages 50+: Opinions on State Social Security Benefits Tax *Methodology and Annotated Questionnaire*

October 2021

METHODOLOGY

In September 2021, AARP engaged Alan Newman Market Research Consultants (ANR) to conduct a quantitative research study among New Mexico voters age 50 and older. The survey was launched on September 7, 2021 and closed on September 29, 2021. Topics included personal retirement income, awareness of state tax issues, opinions regarding Social Security income tax, and reactions to various state Social Security benefits tax proposals. ANR completed a total of 801 interviews (240 via landline telephones and 561 via cell phone). Interviews were conducted in both English and Spanish, based on respondent preference (797 in English and 4 in Spanish). Respondents were screened to meet the following criteria:

- Age 50+
- Resident of New Mexico
- Registered to vote in New Mexico

Sample

Both landline and cell phone sampling were used for this research, with the sample drawn randomly from a list of New Mexico voters age 50 and older, purchased from Aristotle. The base sample of 801 respondents yields a maximum statistical error of $\pm 3.5\%$ at the 95% level of confidence. (This means that in 95 out of 100 samples of this size, the results obtained in the sample would be within ± 3.5 percentage points of the results obtained had everyone in the population been interviewed.)

Percentages of some questions may exceed 100% due to rounding or the use of multiple response question formats. All data have been weighted by age, gender, and race/ethnicity according to 2021 New Mexico state voter database statistics.

**AARP in New Mexico Survey of Registered Voters Ages 50+:
Opinions on State Social Security Tax Benefits
n=801 registered voters ages 50 and older statewide
Maximum statistical error = $\pm 3.5\%$**

Hello, this is _____ calling from _____, a national opinion research firm. We are not telemarketers and are not trying to sell you anything. We are interested in your thoughts about important issues facing New Mexicans. Your views are important and we would greatly appreciate your participation. Your confidential responses will be summarized and shared.

Screening Questions

QS1. Our study is interested in the opinions of certain age groups. Could you please tell me your age as of your last birthday? [IN YEARS] _____ [AGE CODED]

%	n=801
0	Under 50 (TERMINATE)
43	50-64
34	65-74
23	75 or older
0	Refused (TERMINATE)

QS2. And just to confirm, are you a resident of New Mexico?

%	n=801
100	Yes
0	No (TERMINATE)
0	Don't know/ refused (TERMINATE)

QS3. What is your 5-digit ZIP Code? _____

QS4. And are you registered to vote in New Mexico?

%	n=801
100	Yes
0	No (TERMINATE)
0	Don't know/ refused (TERMINATE)

Main Questionnaire

1. How would you rate the current condition of the economy in New Mexico? Is it excellent, good, fair, or poor? [REVERSE SCALE EVERY OTHER TIME]

%	n=801
2	Excellent
16	Good
40	Fair
40	Poor
2	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

2. And how would you rate your own personal financial situation these days.....would you say you are in (reversed) excellent shape, good shape, fair shape, or in poor shape financially? [REVERSE SCALE EVERY OTHER TIME]

%	n=801
13	Excellent
41	Good
33	Fair
12	Poor
<1	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

3. Which of the following best describes your current employment status? Are you...? [READ EACH ANSWER CATEGORY IN ORDER]

%	n=801
7	Self-employed full-time
5	Self-employed part-time
18	Employed full-time
3	Employed part-time
54	Retired and not working at all
4	Unemployed and looking for work
8	Or are you not in the labor force for other reasons
1	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

4. Are you or your spouse or partner currently receiving Social Security retirement benefits?

%	n=801
32	Yes, only I am
7	Yes, only my spouse/partner is
24	Yes, both of us are
36	No
0	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

5. For each of the following possible sources of income in retirement, please indicate whether [IF RETIRED, READ: it is...] [IF NOT RETIRED, READ: you expect it to be] a *major* source of income, a *minor* source of income or *not* a source of income in your retirement:[RANDOMIZE a-e; anchor f] [REVERSE SCALE]

n=801	Major source %	Minor source %	Not a source at all %	Not sure %	Refused %
a. Social Security	51	37	9	2	2
b. An employer-provided, traditional pension benefit based on salary and years of service	34	16	47	3	2
c. An employer-sponsored retirement savings plan, such as a 401(k), tax-deferred annuity or 403(b)	18	23	54	4	1
d. Employment	19	18	57	4	2
e. An Individual Retirement Account or IRA	17	31	46	4	2
f. Other personal savings or investments such as mutual funds, stocks, certificates of deposit, or annuities	19	33	44	3	2

6. The state of New Mexico provides many services and programs for its residents. After I read some of them to you, please tell me if it is important or not important to you that the state maintain that state service or program. Let's begin.... [RANDOMIZE AND INSERT a-h; READ

FOR a and b, then only as a prompt: *and would you say that it is important or not important [to you] [that New Mexico maintain this service or program? And would you say it's (very/somewhat) (not very/not at all) [REVERSE SCALE EVERY OTHER TIME]*

n=801	Very important %	Somewhat important %	Not too important %	Not important at all %	Not sure %	Refused %
a. State and local parks and recreation	45	42	8	5	<1	<1
b. Services for older persons and those with disabilities that allow them to remain in their home such as meals on wheels, personal care assistance, transportation services, etc.	73	18	3	5	1	<1
c. State and local infrastructure, such as bridges or road maintenance and repair	73	21	3	3	<1	0
d. Health care services for children and low-income families	67	20	4	8	1	<1
e. New Mexico public universities and colleges	57	27	7	8	1	<1
f. Public safety, such as fire and police and other first responder rescue	89	8	2	1	<1	<1
g. K through 12 public education	77	12	3	7	1	<1
h. Mental health care services and programs	66	20	4	9	<1	<1

7. Retirement income is a source of income received once a person retires. This income may come from a number of different sources such as pension plans, 401(k) accounts, IRAs, self-employed retirement savings, or Social Security benefits. Are you aware that currently, most retirement income is taxed in New Mexico?

%	n=801
80	Yes
18	No
2	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

8. In the past 12 months, how much have you heard, seen or read about state tax issues.... would you say (reversed) a great deal, a fair amount, some but not much, or nothing at all? [REVERSE SCALE EVERY OTHER TIME]

%	n=801
9	A great deal
24	A fair amount
40	Some but not much
26	Nothing at all
1	Not sure [DO NOT READ]
<1	Refused [DO NOT READ]

9. And in the past 12 months, how much have you heard, seen or read about a state tax on Social Security benefits? [REVERSE SCALE EVERY OTHER TIME]

%	n=801
9	A great deal
18	A fair amount
31	Some but not much
41	Nothing at all
1	Not sure [DO NOT READ]
0	Refused [DO NOT READ]

Qs 10, 11, AND 12 REVERSE SCALE EVERY OTHER RESPONDENT

10. As you may know, New Mexico currently taxes the Social Security benefits of individual filers with income greater than \$25,000 and joint filers with income greater than \$32,000. In general, do you support or oppose this current state tax? And is that strongly or somewhat?

%	n=801
6	Strongly support
12	Somewhat support
4	Neither support nor oppose [VOLUNTEERED]
19	Somewhat oppose
56	Strongly oppose
3	Not sure [DO NOT READ]
<1	Refused [DO NOT READ]

11. There are some proposals in the state to eliminate or reduce this tax so that more middle-income New Mexicans will not have to pay this tax on their Social Security benefits. Other proposals aim to maintain the revenue stream provided by this tax to continue supporting certain essential state and local programs and services.

Hearing this, do you support or oppose New Mexico taxing Social Security benefits? And is that strongly or somewhat?

%	n=801
7	Strongly support
15	Somewhat support
4	Neither support nor oppose [VOLUNTEERED]
14	Somewhat oppose
56	Strongly oppose
3	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

12. Do you agree or disagree that New Mexico should consider other sources of revenue to support essential programs and services rather than revenue from the tax imposed on Social Security benefits?

%	n=801
65	Strongly agree
19	Somewhat agree
3	Neither agree nor disagree
4	Somewhat disagree
6	Strongly disagree
3	Not sure [DO NOT READ]
<1	Refused [DO NOT READ]

13. I'm going to read some possible new ways that New Mexico could generate revenue to support essential programs and services if the Social Security benefits tax were reduced or eliminated. After each, please tell me if you would support or oppose that revenue option [READ EACH RANDOMIZE and INSERT a-k; REVERSE SCALE] ...? *Is that strongly or somewhat?*

n=801	Strongly support %	Somewhat support %	Neither support nor oppose %	Somewhat oppose %	Strongly oppose %	Not sure %	Refused %
a. Impose a real estate transfer tax on properties over \$500,000 – this is a tax on the transfer of a property's title or deed	25	28	3	17	24	2	<1
b. Raise the state gasoline tax	11	15	5	18	52	1	<1
c. Increase the state income tax on all income above \$1 million per year	61	15	2	5	16	2	<1
d. Increase the state income tax on all income above \$400,000 per year	48	22	3	9	17	1	0
e. Increase property taxes	3	11	5	21	60	<1	1
f. Increase the tax on recreational marijuana	54	20	5	6	13	2	<1
g. Increase taxes on tobacco products	61	18	2	7	12	1	<1
h. Reinstitute the estate tax	12	15	8	15	45	6	1
i. Increase corporate income taxes	43	20	3	11	20	2	1

j. Increase taxes on vaping products	63	14	3	6	11	3	1
k. Impose a home builders' tax also known as a construction tax	10	19	7	23	38	3	1

14. Now I'd like to get your opinion on three proposals New Mexico is considering regarding the state taxation of Social Security benefits. [RANDOMIZE a, b, c] [REVERSE SCALES]

a. [One proposal] would eliminate state taxation on Social Security benefits in New Mexico almost immediately, for example, at the start of the next calendar year. Would you support or oppose this proposal? Is that strongly or somewhat?

%	n=801
63	Strongly support
17	Somewhat support
1	Neither support nor oppose [VOLUNTEERED]
6	Somewhat oppose
11	Strongly oppose
2	Not sure [DO NOT READ]
<1	Refused [DO NOT READ]

b. [Another proposal] would keep the state tax on Social Security benefits but raise the existing taxable income thresholds. For example, the thresholds would increase from \$25,000 to \$50,000 for an individual filer and from \$32,000 to \$100,000 for joint filers so that only filers with income over these higher amounts would have their Social Security benefits taxed in New Mexico. Do you support or oppose this proposal? Is that strongly or somewhat?

%	n=801
27	Strongly support
27	Somewhat support
4	Neither support nor oppose [VOLUNTEERED]
12	Somewhat oppose
28	Strongly oppose
3	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

c. [A third proposal] would phase out the state tax on Social Security benefits over time – such as 5 to 10 years. Would you support or oppose this proposal? Is that strongly or somewhat?

%	n=801
31	Strongly support
29	Somewhat support
4	Neither support nor oppose [VOLUNTEERED]
14	Somewhat oppose
21	Strongly oppose
2	Not sure [DO NOT READ]
0	Refused [DO NOT READ]

Demographics

D1. A family caregiver is someone who provides **UNPAID** care for an older parent, spouse or other adult loved one who is ill, frail, elderly, or has a physical, mental, or emotional disability. This **UNPAID** care may include assisting with personal needs like bathing and dressing, household chores, meals, shopping, transportation, or managing finances, paperwork, or medical care.

a. Are you now or have you ever been a family caregiver – which means you provided **UNPAID** care to an adult loved one?

%	n=801
41	Yes
58	No
<1	Not sure [DO NOT READ]
0	Refused [DO NOT READ]

b. [If yes to D2a] As a family caregiver, have you ever incurred any of the following expenses for the following services to help care for your loved one? [RANDOMIZE AND INSERT a thru f]

n=331	Yes %	No %	Not sure %	Refused %
a. Making modifications to your or your loved one's home	59	40	1	0
b. Purchasing equipment like a wheelchair, hearing aids, vision aids, or wearable devices	57	43	1	0
c. Hiring a home health aide or personal care attendant	34	66	<1	0
d. Using respite care to get a break from your caregiving responsibilities	19	78	3	0
e. Using adult day care	15	84	1	0
f. Transporting your loved one to where they need to go	89	10	<1	0

D2. What is the highest level of education that you completed? [READ EACH ANSWER CATEGORY]?

%	n=801
3	0-12 th grade (no diploma)
22	High school graduate or equivalent
14	Post-high school education (no degree)
16	2-year college degree
20	4-year college degree
4	Post-graduate study (no degree)
22	Graduate or professional degree
<1	Not sure [DO NOT READ]
<1	Refused [DO NOT READ]

D3. What is your current marital status? Are you currently [READ EACH ANSWER CATEGORY]?

%	n=801
54	Married
4	Not married but living with your partner
1	Separated
14	Divorced
13	Widowed
14	Single and never married
<1	Not sure [DO NOT READ]
1	Refused [DO NOT READ]

D4. Are you or your spouse or partner currently a member of A-A-R-P?

%	n=801
40	Yes
59	No
1	Not sure [DO NOT READ]
<1	Refused [DO NOT READ]

D5. Are you of Hispanic, Spanish, or Latino origin or descent?

%	n=801
31	Yes
68	No
0	Not sure [DO NOT READ]
2	Refused [DO NOT READ]

D6. What is your race? Are you...[READ EACH ANSWER CATEGORY – MULTIPLE RESPONSES ALLOWED]?

%	n=801
86	White or Caucasian
1	Black or African American
4	American Indian or Alaska Native
1	Asian
<1	Native Hawaiian or other Pacific Islander
6	Something else [DO NOT READ] [RECORD ANSWER]
1	Not sure [DO NOT READ]
3	Refused [DO NOT READ]

D7. Do you consider yourself to be a....? [RANDOMIZE A-C, read D last]

%	n=801
44	Democrat
30	Republican
24	Independent
1	Something else? [RECORD ANSWER]
1	Not sure
2	Refused

D8. How would you characterize your political views? [READ EACH ANSWER CATEGORY.]

%	n=801
20	Very conservative
24	Somewhat conservative
23	Moderate
17	Somewhat liberal
11	Very liberal
2	None of the above/something else [DO NOT READ]
2	Not sure
1	Refused

D9. We realize income is a private matter and so rather than ask you anything specific about your income, I'd like to ask you to please stop me when I get to the category that includes your household's income before taxes in 2020. First, was your household income less than \$60,000 or \$60,000 or more?

%	n=801
44	Less than \$60,000.00
49	\$60,000 or more
1	Not sure
6	Refused

a. [IF LESS THAN \$60,000, READ]: So was it.....?

%	n=356
8	Less than \$10,000
15	\$10,000 to less than \$20,000
29	\$20,000 to less than \$30,000
17	\$30,000 to less than \$40,000
18	\$40,000 to less than \$50,000
8	\$50,000 to less than \$60,000
3	Not sure
3	Refused

b. [IF \$60,000 OR MORE, READ]: So was it.....?

%	n=394
25	\$60,000 to less than \$75,000
28	\$75,000 to less than \$100,000
19	\$100,000 to less than \$125,000
25	\$125,000 or more
1	Not sure
2	Refused

D10. ASK GENDER. To ensure it is recorded accurately, could you please state your gender?

%	n=801
47	Male
53	Female
0	Other

For more information about this survey or the methodology, please contact Jennifer Sauer, AARP Research, at jsauer@aarp.org

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