



Tax Reform in Alaska: An AARP Survey of Residents Age 18+

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Background

Over the past couple of decades, Alaska's economy and its state budget have benefited greatly from oil production and its tax revenues. Indeed, oil revenue has enabled the state to create the Constitutional Budget Reserve (CBR) - a savings account and buffer from often unpredictable swings in oil prices – as well as establish the Permanent Fund to accrue assets for issuing dividends and protection against inflationary pressures.¹ From 1982 through 2003, the Fund has paid out \$12.5 billion in dividends to every Alaskan.² Moreover, Alaska has been able to eliminate its income tax and commit 80 percent of oil revenue to the state's education, health and social services, rural development, and infrastructure.³

Since its peak in 1988, oil production in Alaska has declined and finally leveled off in 1999. However, while production was declining, the state was borrowing from the CBR to maintain many state government services and programs. The state Office of Management and Budget (OMB) reports that for eleven of the last thirteen years Alaska has been “living beyond its means” and spending more CBR funds than are replaced by recurring revenue. Through June 2002, the state used about \$5 billion of CBR funds to pay off deficits and if this pace of spending continues it could drain the CBR in the next couple of years.⁴ This diminishing reserve has resulted in some state services and programs being cut last year in 2003 because there was not enough fund revenue. While it is highly likely that the Alaska Legislature and Governor will make additional cuts in services and programs this year, many elected officials of both parties believe the most politically palatable cuts have already been made.

Some state officials have suggested three other major sources for generating enough revenue to balance the state budget and avoid cuts in services and programs. These three proposals are:

- a statewide sales tax
- a statewide income tax
- some changes in the use of the Permanent Fund

Each of these proposals poses unique challenges. Any discussion of changes to the Permanent Fund usually generates tremendous opposition and protection of the dividend checks, while trying to pass tax legislation during an election year is a difficult task for legislators seeking re-election. With the exception of Anchorage and Fairbanks, every other city in Alaska has a sales tax – some as high as seven percent – so many fear an additional statewide sales tax will disrupt their local economy. With respect to the proposal for a state-wide income tax, while the Alaska Municipal League has endorsed it over a sales tax, Governor Murkowski has stated that he will not support an income tax.⁵ As a result, the Alaska House Ways and Means Committee has conducted hearings in many local cities to determine what Alaska residents believe should be done.

¹ Office of Management and Budget. *Taking Responsibility Today for Alaska's Tomorrow*. December 15, 2003, Revised.

² Alaska Permanent Fund Corporation, *Fund Performance in the Fourth Quarter of 2003*.

³ Alaska Oil & Gas Reporter. Athans, M. *Norway, Alaska Considered As Models For Iraqi Oil Industry*. Web posted Tuesday, June 10, 2003, www.oilandgasreporter.com/stories/061003/ind_200306010005.shtml.

⁴ The Alaska Citizen's Guide to the Budget. Website prepared by Institute of Social and Economic Research of the University of Alaska Anchorage. http://citizensguide.uaa.alaska.edu/5.BUDGET_GAP/5.1.What_is_it.htm.

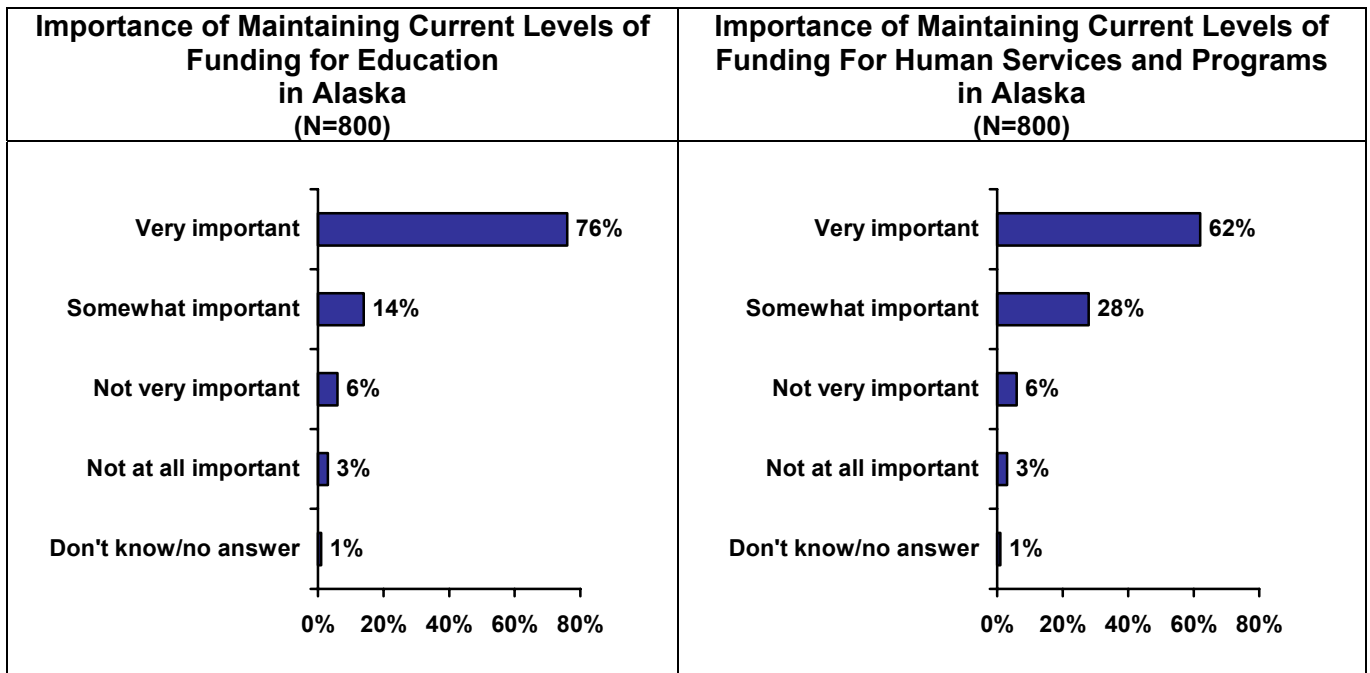
⁵ Juneau Empire State News Online. Inklebarger, T. *Cities to push income tax: Tax would affect non-Alaskans more than other options*. Web posted Friday, July 25, 2003. http://www.juneauempire.com/stories/072503/sta_citiespush.shtml.

The purpose of this survey is to gauge the opinion of Alaskans age 18 and older regarding the three major proposals to generate revenue in the state and prevent education and human services from being cut. This population was surveyed because the entire adult population is likely to pay whatever taxes are levied. Respondents ages 50 and older account for forty percent of all completed interviews for this survey. Please see the Methodology section at the end of this report for more information.

Findings

At least eight in ten people in Alaska say it is important to them that the state maintains current levels of funding for education and human services and programs.

Nearly all Alaskans think it is important for the state to maintain its current levels of funding for education and human services like health care and social services for children, low-income people, older people, and people with disabilities – even if they may not currently be eligible for those services. In fact, at least six in ten say it is very important to them that the state maintain these public services and programs.



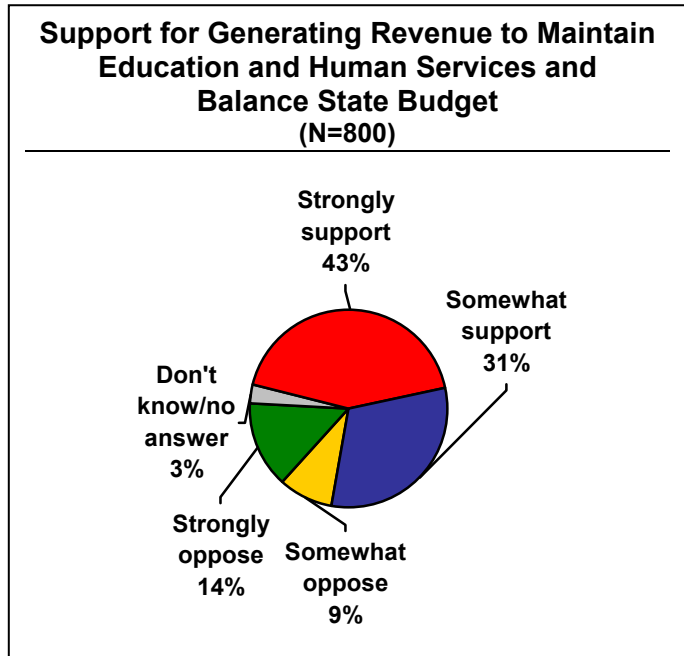
Younger Alaskans ages 18 to 34 are more likely than those ages 50 to 64 to say that maintaining current levels of funding for education is very important. However, Alaskans of all ages view maintaining funding for human services and programs as very important.

With respect to income differences, people in Alaska who report annual incomes less than \$50,000 are more likely than those with higher incomes to say that maintaining state funding levels for education is very important. Similarly, those with incomes less than \$30,000 are more likely than those with incomes greater than \$50,000 to say that it is very important for the state to maintain current levels of funding for human services and programs (see Tables 1 and 2 in Appendix A).

The majority of Alaskans support the state finding ways to generate revenue for education and human services.

In order to avoid cuts in education and human services and help balance the state budget, three-quarters of Alaska residents age 18 and older say they support the state finding ways to generate additional revenue if the money would be spent on education and human services: four in ten strongly support, and one-third somewhat support the this effort.

While Alaskans across all income levels are strongly support the state’s efforts to look for ways to generate additional revenue, those ages 35 and older are more likely than those younger to say they strongly support these efforts (see Table 3 in Appendix A).



Half of all Alaskans think that the cost of human services and programs should be shared between the individual and the state government.

Slightly over half of all Alaskans feel that individuals and the state government should share in the responsibility of financing state programs and services. However, about one in seven feel the costs of human services should be paid mostly by the individual receiving the care and over one-quarter think the state should cover most of the costs for human services and programs.

Younger people and those with lower annual incomes in Alaska are more likely than those ages 50 and older and those with incomes greater than \$30,000 to say that the costs should be shared.

How State Human Services and Programs Should Be Paid (N=800)	Total %
Shared between the individual and the state government	53
Paid mostly by the state	28
Paid mostly by the individual receiving care	14
Not sure/ no answer	6

Lower-income residents are also more likely than those with incomes greater than \$30,000 to say that human service costs in the state should be paid for mostly by the state. However, they are less likely than those Alaskans whose incomes are \$50,000 or more to say that such costs should be paid for mostly by the individual receiving the care. There are no significant age differences among those Alaskans who feel that the cost of human services should be paid mostly by the state or mostly by the individual (see Table 4 in Appendix A).

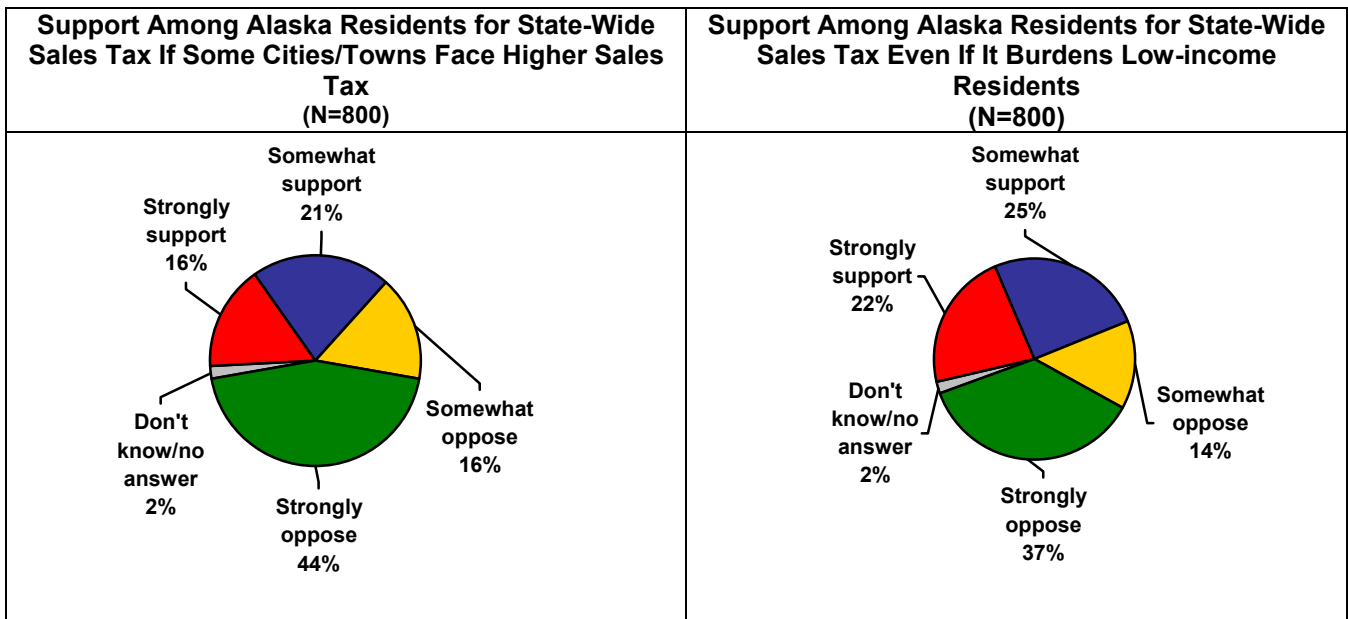
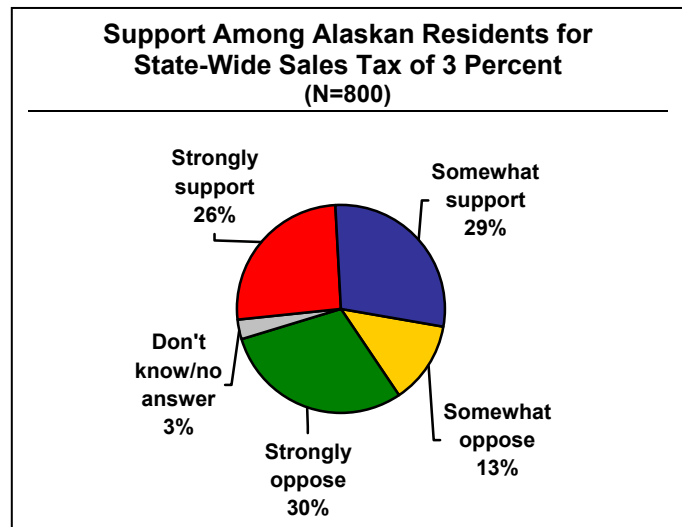
Implementing a State-Wide Sales Tax in Alaska

Alaska residents are concerned about the impact that a 3 percent sales tax will have on some cities and towns.

Survey respondents were next asked three questions to gauge their opinion about how to generate revenue in Alaska for human services and to help balance the state budget. The first question simply asked them how strongly they would support or oppose implementing a sales tax in all cities and towns, including Fairbanks and Anchorage, of at least 3 percent on all products except medicine and food sold only at grocery stores. Two follow-up questions asked respondents again how strongly they would support or oppose this initiative after the effects such a tax could have on some communities were described. While over half say they would strongly or somewhat support the implementation of a state-wide sales tax of 3 percent, almost one-third say they would strongly oppose it.

However, support for the initiative declined once respondents were told how a three percent increase could make residents of some cities and towns face an even higher sales tax rate of possibly 9 or 10 percent. Likewise, respondents showed less support for a sales tax after learning that it could be a burden on low income residents.

Interestingly, Alaskans of all ages and income levels are equally likely to strongly oppose a state-wide sales tax overall, as well as strongly oppose the initiative because of the burden it may place on lower-income families.



However, Alaskans ages 65 and older are significantly more likely than those ages 18 to 34 to strongly oppose a state-wide sales tax because of the impact it could have on some cities and towns.⁶

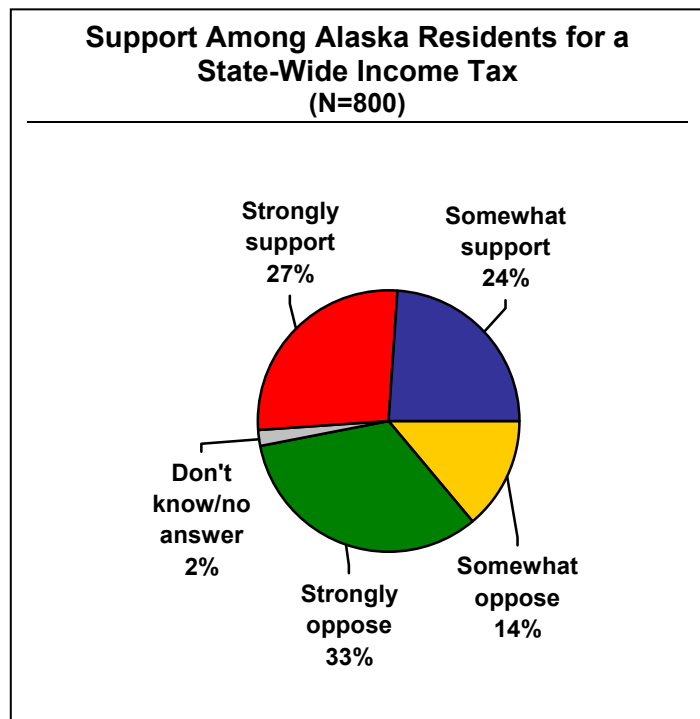
Alaskans ages 50 to 64 are more likely than those younger to strongly support implementing a state-wide sales tax of 3 percent in all cities and towns. This age group is also more likely than younger residents to strongly support a state sales tax even if some cities and towns could face a much higher sales tax rate than others. Those ages 50 to 64 are more likely than either the younger or the older residents to strongly support this tax initiative even after learning how it will affect low-income families in the state (see Table 5, 6, and 7 in Appendix A).

Implementing a State Income Tax in Alaska

Half of all Alaskans support a state-wide income tax.

Respondents were also asked their opinion regarding the implementation of an income tax – something Alaskans have not paid in 20 years. After a brief description of the current situation regarding the state’s oil revenues and the need to maintain human services and programs while balancing the state budget, respondents were asked how strongly they would support or oppose a progressive income tax: people with higher incomes pay a higher tax rate than those with lower incomes. Alaskans are divided over this proposal: half strongly or somewhat support, this proposal, while a slightly smaller proportion of Alaskans say they oppose it.

Those residents ages 50 to 64 are more likely than those younger to say they strongly support the state implementing a state-wide income tax. However, there are no age differences among those Alaskans who strongly oppose an income tax. With respect to income differences, opposition to a state-wide income tax increases as income increases: Alaskans with incomes of \$50,000 or more are more likely than those with lower annual incomes to strongly oppose this proposal. Conversely, those with incomes less than \$50,000 are more likely than higher income Alaskans to strongly support a progressive state-wide income tax (see Table 8 in Appendix A).

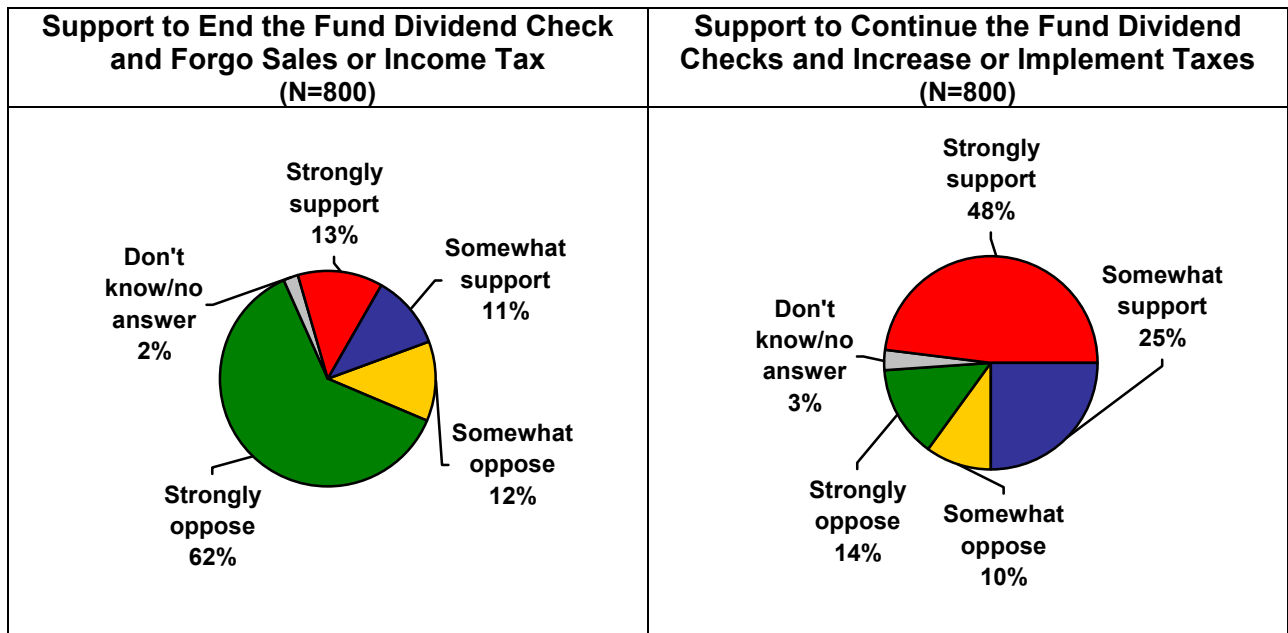


Amending or Terminating the Alaska Permanent Fund Dividend Checks

A majority of Alaskans oppose ending the Fund dividend checks even if it means an increase in sales tax or a new state income tax.

When asked how strongly they would support Alaska ending the Permanent Fund dividend check altogether if it meant there would be no need for the state to increase or impose a sales or income tax for at least 20 years, the majority of respondents oppose the proposal, with over six in ten saying they strongly oppose it.

Conversely, nearly half of all Alaskans say they strongly support an increase or implementation of taxes in the state as long as they can continue to receive the Fund dividend check each year.



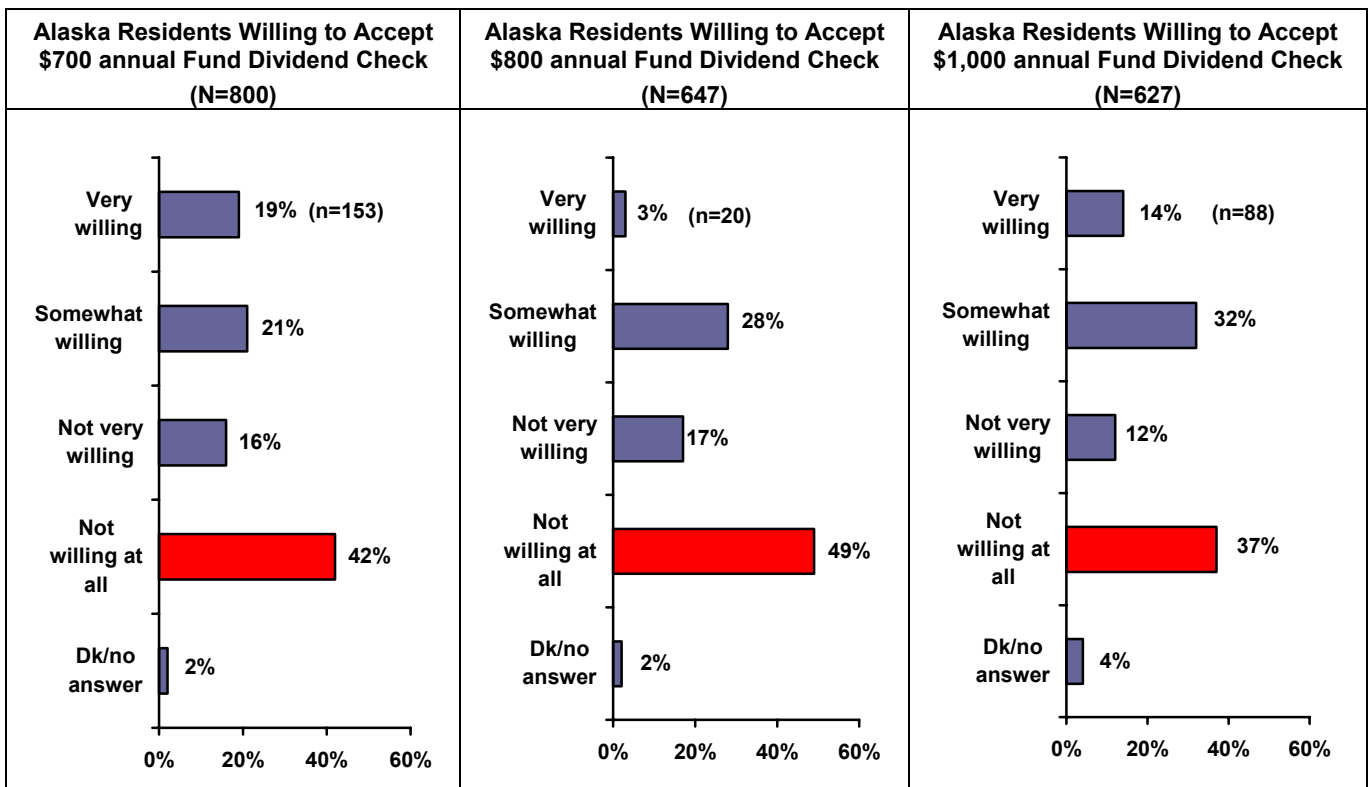
With respect to the proposal to end the Permanent Fund checks altogether and forgo a sales tax increase and/or an imposed income tax, Alaska residents do not differ by income in their support or opposition. However, those residents ages 65 and older are more likely than younger residents to say they strongly oppose this plan.

Residents do not differ in their support by age for continuing to receive dividend checks, but those who report annual incomes less than \$30,000 are more likely than those with incomes between \$30,000 and \$50,000 to say they strongly support continuing to receive the Fund checks even if it means the state must implement or increase taxes (see Tables 9 and 10 in Appendix A).

In general, Alaskans are not very willing to accept reductions in their Permanent Fund dividend checks. However, about one-third of all Alaskans may be very willing, and another quarter are somewhat willing, to accept a \$100 reduction in their checks as option to help maintain human services and balance the state budget.

Over the past three years, Alaskans have observed reductions in their annual dividend check. In October of 2003, they received a check for \$1,107. This survey explored willingness to accept a stable payment of \$700 per year if other revenues from the fund are used to maintain services and balance the budget. Among those individuals who are less than *very willing* to accept a check of \$700, willingness to accept an \$800 dividend was tested, and then willingness to accept a \$1,000 check was tested.

Four in ten Alaskans say they are very or somewhat willing to accept a four hundred dollar reduction in their annual dividend check if it will always equal \$700 in order to allow the state to use some of the fund as well. Among those who are reluctant to accept a \$700 check, very few are willing to accept a slightly higher dividend of \$800. However, among those who are reluctant to accept a \$700 or an \$800 dividend check, one in seven are very willing to accept a check that will equal \$1,000 – only about one hundred dollars less than their 2003 dividend check.



A fuller picture emerges when looking across each possible reduction and projecting the results to *all* respondents. If we assume that those who are very willing to accept \$700 would also be willing to accept higher dividend checks, and similarly that those who would accept an \$800 dividend check would accept a higher amount, we find that one-third (33%) of residents would be *very willing*, and another quarter are *somewhat willing*, to accept a \$1,000 check. However, it is important to note that almost three in ten (29%) of the total respondent pool are *not at all* willing to accept a \$1,000 dividend check.

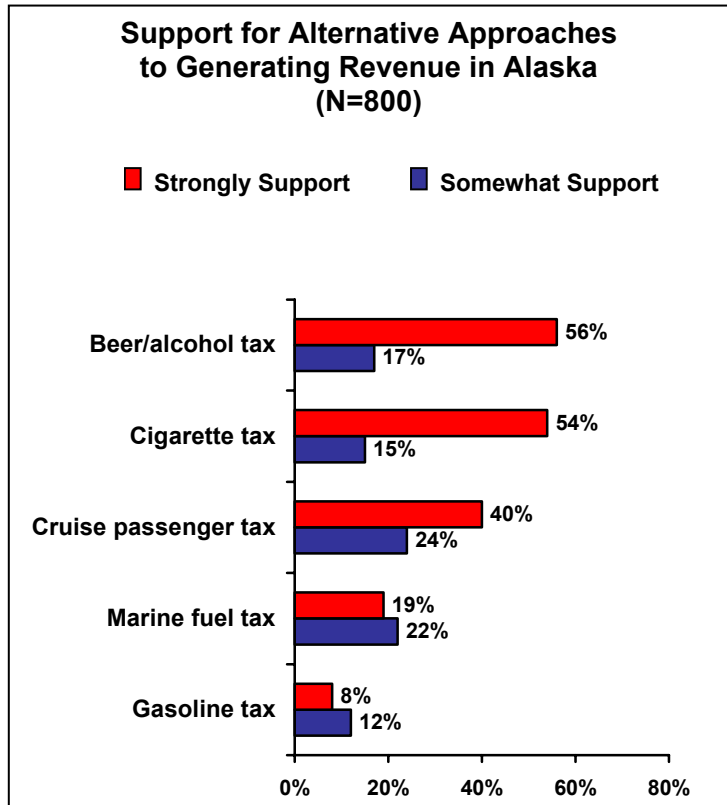
Among those Alaskans who are not willing at all to accept any of the reductions tested in the survey, there are no differences between income levels. However, there are some differences between older and younger Alaskans – extreme reluctance to accept either an \$800 or \$1,000 dividend check increases with age (see Tables 11, 12, and 13 in Appendix A).

At least half of all Alaska residents strongly support increasing the cigarette tax and the beer and alcohol tax in order to avoid cuts in funding for education and human services.

To help generate money for state programs, Alaskans age 18 and older are more in favor of increasing the current tax rate on cigarettes and alcohol than they are of increasing the tariffs on marine fuel or gasoline. In addition, nearly two-fifths of Alaska residents would strongly support the state in charging a sales tax on cruise ship passengers of at least \$50 per passenger.

Younger Alaska residents are more likely than those ages 35 to 49 to strongly support an increase in the current cigarette tax rate in the state. They are also significantly more likely than those ages 50 and older to strongly support a tax on cruise ship passengers.

Residents with incomes less than \$30,000 are more likely than those who report annual incomes greater than \$50,000 to strongly support a tax on cruise ship passengers, and more likely than middle income residents to strongly support an increase in marine fuel tax. However, higher income residents are significantly more likely than those with incomes less than \$30,000 to strongly support a cigarette tax increase.



Conclusions

Clearly, preserving the state's educational and human service programs is very important to Alaska residents, and they support the state in its efforts to find ways to generate the revenue needed to balance the budget and avoid cutting any of these services. In fact, many Alaskans indicate a willingness to share the cost of human services with the state government, and one in seven feel that such costs should be paid solely by the individual receiving the care (or service). Yet, most Alaskans are unwilling to contribute to the state economy in ways that could yield the greatest long-term revenue impact on the state budget and ultimately determine the continuance of some very important state programs and services.

For the most part, Alaskans are divided over the proposals for a state-wide income tax and a state-wide sales tax as ways to help keep state programs running and balance the state budget. They become less supportive of the sales tax, however, once they learn that some cities and towns could face much higher sales tax rates and that it would have a negative effect on lower-income residents. Given these findings, it would be wise to further probe Alaskans about how much of an *income* tax they would tolerate.

Although one-quarter of Alaskans support the proposal to end the Permanent Fund Dividend Check program and thereby eliminate the need for a state-wide sales or income tax for about 20 years, most do not want to surrender this annual check, even if it means new taxes. Furthermore, many are not willing to accept even a reduction in their annual check so that the state could use some of this fund for the maintenance of education and human services and programs. As the amount of the check decreases, so does their willingness to accept a reduction. If this option is considered as a way in which to help balance the state budget and avoid cutting state programs, the state may want to reduce the dividend check in smaller increments over time, but probably could not eliminate it altogether at this time.

Finally, similar to residents in many states,⁷ Alaskans are especially supportive of their state implementing or increasing the rate on "sin" taxes, i.e. taxes on cigarettes or tobacco products, beer and other alcohol products. In addition, many Alaskans support taxing cruise ship passengers by at least fifty dollars per passenger.

⁷ Binette, J., *Maintaining Health and Long-Term Care: A Survey on Arkansas' Food, Medicine, and Soda Pop Tax*, Washington, D.C.: AARP, 2002.

⁷ Cummins, R., *Maintaining Health and Long-Term Care: A Survey on Addressing the Revenue Shortfall in California*, Washington, D.C.: AARP, 2002.

⁷ Sauer, J.H., *Idaho Prescription Drug Financing Survey*, Washington, D.C.: AARP, 2002.

⁷ Sauer, J.H. *Montana Member Opinion Survey*, Washington, D.C.: AARP, 2002.

⁷ Cummins, R., *Funding Health and Long-Term Care: A Survey on Increasing North Carolina's Cigarette and Alcohol Taxes*, Washington, D.C.: AARP, 2002.

⁷ Cummins, R and Stowell-Ritter, A., *Funding Health and Long-Term Care: A Survey on Increasing South Carolina's Cigarette Tax*, Washington, D.C.: AARP, 2002.

⁷ Cummins, R., *Funding Health and Long-Term Care: A Survey on Increasing Virginia's Cigarette Tax*, Washington, D.C.: AARP, 2002.

⁷ Bridges, K., *Vermont Long-term Care: Legislative Survey of AARP Members*, Washington, D.C.: AARP, 2002.

Methodology

AARP commissioned Alan Newman Research to conduct a telephone survey in Alaska on the subject of proposed cuts to state programs and services and generating revenue to help maintain them as well as the state budget. Interviewing for this survey took place from November 12 through November 23, 2003. The sample was generated using a random digit dialing process. A total of 800 interviews were completed with respondents from the general population ages 18 and older living in Alaska. This survey yielded a 33 percent response rate and a 50 percent cooperation rate.⁸ This survey has a sampling error of plus or minus 3 percent. This means that in 95 out of 100 samples of this size, the results obtained in the sample would fall in a range of 3 percentage points of what would have been obtained if every state resident age 18 or older had been surveyed. Data were weighted to reflect the actual distribution of age, gender and education for the population. However, caution must be used when interpreting age differences between respondents ages 65 and older and other age groups due to small *n* in this older group. Percentages of some questions may exceed 100% due to the rounding or the use of multiple response question formats.

An Annotated Questionnaire of the responses is provided in Appendix B.

⁸ This response rate formula (RR3) requires the calculation of 'e' which is the proportion of cases of unknown eligibility that are estimated to actually be eligible. The following formula was used to determine 'e': $e = \text{Complete} + \text{Refusal} + \text{Terminate Early} + \text{Confirmed Household No Answer, Busy, and Answering Machine} + \text{Callbacks} + \text{Language Barrier} / \text{Complete} + \text{Refusal} + \text{Terminate Early} + \text{Confirmed Household No Answer, Busy, and Answering Machine} + \text{Callbacks} + \text{Language Barrier} + \text{Government/Business} + \text{Non-Working} + \text{Screened Out} + \text{Over Quota}$.

APPENDIX A

AGE* AND INCOME TABLES

* Caution must be used when interpreting age differences between respondents ages 65 and older due to small n in this group.

Table 1: Importance of state maintaining current levels of funding for education.

By age

Level of Importance regarding Alaska maintaining education.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Very important	76%	82%	76%	71%	74%
Somewhat important	14	13	14	15	11
Not very important	6	2	7	6	8
Not at all important	3	2	2	5	8
Don't know/no answer	1	--	1	3	--

-- :less than 1 percent or zero

By income

Level of Importance regarding Alaska maintaining education.	Total % (N=800)	Annual Income <\$30,000 (n=214)	Annual Income \$30K to \$49.9K (n=181)	Annual Income \$50K to \$74.9K (n=318)
		Very important	76%	83%
Somewhat important	14	9	12	17
Not very important	6	5	4	7
Not at all important	3	1	2	5
Don't know/no answer	1	1	--	2

-- :less than 1 percent or zero

Table 2: Importance of state maintaining current levels of funding for human service programs.

By age

Level of Importance regarding Alaska maintaining human service programs.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Very important	62%	63%	63%	59%	67%
Somewhat important	28	31	28	25	21
Not very important	6	3	6	9	5
Not at all important	3	2	2	4	6
Don't know/no answer	1	1	--	2	1

-- :less than 1 percent or zero

By income

Level of Importance regarding Alaska maintaining human service programs.	Total % (N=800)	Annual Income <\$30,000 (n=214)	Annual Income \$30K to \$49.9K (n=181)	Annual Income \$50K to \$74.9K (n=318)
		Very important	62%	72%
Somewhat important	28	24	29	30
Not very important	6	3	6	8
Not at all important	3	1	1	5
Don't know/no answer	1	--	2	1

-- :less than 1 percent or zero

Table 3: Level of support for state finding ways to generate additional revenue for education and human services.

By age

Level of Support for State Finding Ways to Generate Additional Revenue.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	43%	35%	46%	48%	51%
Somewhat support	31	38	30	25	25
Somewhat oppose	9	12	8	9	2
Strongly oppose	14	12	14	14	18
Don't know/no answer	3	3	2	5	3

-- :less than 1 percent or zero

By income

Level of Support for State Finding Ways to Generate Additional Revenue.	Total % (N=800)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=214)	\$30K to \$49.9K (n=181)	\$50K to \$74.9K (n=318)
Strongly support	43%	48%	44%	40%
Somewhat support	31	33	32	30
Somewhat oppose	9	5	8	12
Strongly oppose	14	12	13	14
Don't know/no answer	3	2	3	4

-- :less than 1 percent or zero

Table 4: Who Alaskans feel should pay for human service programs.

By age

Who should Pay for Human Service Programs	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
The individual receiving care	14%	12%	13%	16%	11%
The state	28	27	29	29	28
The individual and the state	53	58	55	48	43
Don't know/no answer	6	4	4	7	19

-- :less than 1 percent or zero

By income

Who should Pay for Human Service Programs	Total % (N=800)	Annual Income <\$30,000 (n=214)	Annual Income \$30K to \$49.9K (n=181)	Annual Income \$50K to \$74.9K (n=318)
		The individual receiving care	14%	9%
The state	28	42	22	23
The individual and the state	53	41	62	56
Don't know/no answer	6	9	5	4

-- :less than 1 percent or zero

Table 5: Level of support for imposing a state-wide 3 percent sales tax.

By age

Level of Support for Imposing a 3 Percent State-wide Sales Tax.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	26%	23%	24%	36%	26%
Somewhat support	29	32	32	21	25
Somewhat oppose	13	16	12	10	9
Strongly oppose	30	27	30	31	32
Don't know/no answer	3	2	2	2	8

-- :less than 1 percent or zero

By income

Level of Support for Imposing a 3 Percent State-wide Sales Tax.	Total % (N=800)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=214)	\$30K to \$49.9K (n=181)	\$50K to \$74.9K (n=318)
Strongly support	26%	29%	26%	26%
Somewhat support	29	29	32	29
Somewhat oppose	13	15	11	11
Strongly oppose	30	24	31	31
Don't know/no answer	3	3	1	3

-- :less than 1 percent or zero

Table 6: Level of support for imposing a state-wide 3 percent sales tax even if some cities/towns face higher sales tax.

By age

Level of Support for Imposing a State-Wide 3 Percent Sales Tax in Addition to Local Taxes.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	16%	14%	13%	25%	16%
Somewhat support	21	24	23	19	9
Somewhat oppose	16	21	16	11	17
Strongly oppose	44	39	46	42	56
Don't know/no answer	3	2	3	3	3

-- :less than 1 percent or zero

By income

Level of Support for Imposing a State-Wide 3 Percent Sales Tax in Addition to Local Taxes.	Total % (N=800)	Annual Income <\$30,000 (n=214)	Annual Income \$30K to \$49.9K (n=181)	Annual Income \$50K to \$74.9K (n=318)
		Strongly support	16%	16%
Somewhat support	21	21	21	21
Somewhat oppose	16	17	18	14
Strongly oppose	44	41	42	46
Don't know/no answer	3	5	2	1

-- :less than 1 percent or zero

Table 7: Level of support for imposing a state-wide 3 percent sales tax even if it presents a financial burden to low-income families.

By age

Level of Support for Imposing a State-wide 3 Percent Sales Tax even if burdens low-income families	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	22%	19%	23%	30%	16%
Somewhat support	25	30	24	22	25
Somewhat oppose	14	15	16	11	12
Strongly oppose	36	33	36	35	40
Don't know/no answer	3	2	2	3	8

-- :less than 1 percent or zero

By income

Level of Support for Imposing a State-wide 3 Percent Sales Tax even if burdens low-income families	Total % (N=800)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=214)	\$30K to \$49.9K (n=181)	\$50K to \$74.9K (n=318)
Strongly support	22%	23%	21%	25%
Somewhat support	25	25	30	24
Somewhat oppose	14	15	14	16
Strongly oppose	36	35	35	33
Don't know/no answer	3	3	1	2

-- :less than 1 percent or zero

Table 8: Level of support for imposing a state-wide income tax to pay for education and human services.

By age

Level of Support for Imposing a State-wide Income Tax to Pay for Education and Human Services.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	27%	26%	24%	35%	32%
Somewhat support	24	30	24	18	17
Somewhat oppose	14	16	16	11	8
Strongly oppose	33	27	35	36	36
Don't know/no answer	2	2	1	1	7

-- :less than 1 percent or zero

By income

Level of Support for Imposing a State-wide Income Tax to Pay for Education and Human Services.	Total % (N=800)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=214)	\$30K to \$49.9K (n=181)	\$50K to \$74.9K (n=318)
Strongly support	27%	36%	24%	25%
Somewhat support	24	25	30	19
Somewhat oppose	14	13	16	14
Strongly oppose	33	24	30	40
Don't know/no answer	2	3	--	1

-- :less than 1 percent or zero

Table 9: Level of support for *ending* the Dividend Check and forgoing a sales or income tax.

By age

Level of Support for Ending Dividend Checks.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	13%	16%	10%	16%	9%
Somewhat support	11	11	13	11	3
Somewhat oppose	12	15	14	9	5
Strongly oppose	62	57	63	60	81
Don't know/no answer	2	2	--	5	3

-- :less than 1 percent or zero

By income

Level of Support for Ending Dividend Checks.	Total % (N=800)	Annual Income <\$30,000 (n=214)	Annual Income \$30K to \$49.9K (n=181)	Annual Income \$50K to \$74.9K (n=318)
		Strongly support	13%	11%
Somewhat support	11	9	12	11
Somewhat oppose	12	13	13	11
Strongly oppose	62	65	63	61
Don't know/no answer	2	2	1	1

-- :less than 1 percent or zero

Table 10: Level of support for *continuing* the Dividend Check and being subjected to a state-wide sales or income tax.

By age

Level of Support for Ending Dividend Checks.	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Strongly support	48%	48%	45%	51%	48%
Somewhat support	25	29	24	19	28
Somewhat oppose	10	9	12	12	5
Strongly oppose	14	11	17	15	13
Don't know/no answer	3	3	2	3	6

-- :less than 1 percent or zero

By income

Level of Support for Ending Dividend Checks.	Total % (N=800)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=214)	\$30K to \$49.9K (n=181)	\$50K to \$74.9K (n=318)
Strongly support	48%	53%	41%	47%
Somewhat support	25	26	25	24
Somewhat oppose	10	7	17	10
Strongly oppose	14	9	16	17
Don't know/no answer	3	5	2	2

-- :less than 1 percent or zero

Table 11: Willingness to accept a \$700 dividend check so that a portion of the Alaska Permanent Fund can support education and human Services.

By age

Willingness to Accept \$700 Dividend Check	Total % (N=800)	Age			
		18-34 (n=261)	35-49 (n=279)	50-64 (n=181)	65+ (n=63)
Very willing	19%	23%	12%	23%	24%
Somewhat willing	21	24	24	14	21
Not very willing	16	16	18	14	10
Not willing at all	42	36	44	46	44
Don't know/no answer	2	1	3	3	--

-- :less than 1 percent or zero

By income

Willingness to Accept a \$700 Dividend Check	Total % (N=800)	Annual Income <\$30,000 (n=214)	Annual Income \$30K to \$49.9K (n=181)	Annual Income \$50K to \$74.9K (n=318)
		Very willing	19%	19%
Somewhat willing	21	20	24	21
Not very willing	16	13	18	16
Not willing at all	42	47	38	40
Don't know/no answer	2	1	2	2

-- :less than 1 percent or zero

Table 12: Willingness to accept an \$800 dividend check so that a portion of the Alaska Permanent Fund can support education and human services.⁹

By age

Willingness to Accept a \$800 Dividend Check	Total % (N=647)	Age			
		18-34 (n=201)	35-49 (n=245)	50-64 (n=140)	65+ (n=48)
Very willing	3%	3%	3%	3%	7%
Somewhat willing	29	34	28	22	30
Not very willing	17	17	20	16	13
Not willing at all	49	43	47	57	48
Don't know/no answer	2	3	2	3	2

-- :less than 1 percent or zero

By income

Willingness to Accept a \$800 Dividend Check	Total % (N=647)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=174)	\$30K to \$49.9K (n=150)	\$50K to \$74.9K (n=249)
Very willing	3%	3%	2%	3%
Somewhat willing	29	31	30	28
Not very willing	17	11	15	20
Not willing at all	49	49	47	49
Don't know/no answer	2	3	1	2

-- :less than 1 percent or zero

⁹ base n of 647 equals those who did not answer 'very willing' to take \$700 check.

Table 13: Willingness to accept a \$1,000 dividend check so that a portion of the Alaska Permanent Fund can support education and human services.¹⁰

By age

Willingness to Accept a \$1,000 Dividend Check	Total % (N=627)	Age			
		18-34 (n=195)	35-49 (n=239)	50-64 (n=136)	65+ (n=44)
Very willing	14%	19%	11%	13%	13%
Somewhat willing	32	36	35	25	27
Not very willing	12	13	13	10	16
Not willing at all	37	26	38	47	43
Don't know/no answer	4	6	4	4	2

-- :less than 1 percent or zero

By income

Willingness to Accept a \$1,000 Dividend Check	Total % (N=627)	Annual Income	Annual Income	Annual Income
		<\$30,000 (n=170)	\$30K to \$49.9K (n=147)	\$50K to \$74.9K (n=241)
Very willing	14%	19%	13%	12%
Somewhat willing	32	31	35	31
Not very willing	12	11	16	13
Not willing at all	37	34	35	41
Don't know/no answer	4	5	1	4

-- :less than 1 percent or zero

¹⁰ base n of 627 equals those who did not answer 'very willing' to take a \$700 or an \$800 check.

APPENDIX B

ANNOTATED QUESTIONNAIRE

Tax Reform in Alaska: An AARP Survey of Residents Age 18+

**Weighted N = 800, Response Rate 33%, Cooperation Rate 50%, Margin of Error \pm 4%
Unweighted N = 800**

Introduction

Hello, my name is _____. I'm calling on behalf of Alan Newman Research, a national opinion research firm. We are conducting a study among Alaska residents and would like to find out your opinions on proposed cuts to services resulting from the state budget shortfall. The survey should only take about 10 minutes of your time. To make our study representative of those living throughout Alaska, I need to speak with the youngest male who is at home right now and is at least 18 years old. May I speak to him?

[INTERVIEWERS -- IF NECESSARY USE ANY OF THE FOLLOWING:]

My name is _____.

I'm calling from Alan Newman Research, a national opinion research firm located in Richmond, Virginia.

Let me assure you, this is NOT a sales call and you will NOT be asked to buy anything either now or later.

We are NOT telemarketers.

You will not be asked to buy anything either now or later.

All of your responses are kept entirely confidential.

Your views are important and we would greatly appreciate your participation.

The survey should only take a few minutes (8 minutes) of your time depending on your answers.

We ask to speak to the youngest male/oldest female to make our survey more representative of the Alaska population. Because of patterns in how people answer the phone, it is important that we randomly pick someone in each household to interview. (Asking for the youngest male first is an easy way to pick someone at random.)

- 1) Person on phone is youngest male
- 2) Other person is youngest male and is coming to phone
- 3) Youngest male never available
- 4) Youngest male not available right now
- 5) DON'T KNOW / NOT SURE
- 6) REFUSED

Respondent Selection

S1. RECORD GENDER OF PERSON WHO ANSWERED PHONE:

- 1) Male
- 2) Female

- S2.** [IF INTRODUCTION = 1, SKIP TO S4; IF INTRODUCTION = 2, SKIP TO S3; IF INTRODUCTION = 6, TERMINATE AS REFUSAL] Then may I speak to the oldest female who is at home right now and is at least 18 years old?
- 1) Person on phone is oldest female → [SKIP TO Q1]
 - 2) Other person is oldest female and is coming to the phone → [SKIP TO S3]
 - 3) Oldest female never available → [TERMINATE AS SCREENED OUT]
 - 4) Oldest female is not available right now → [ARRANGE CALLBACK]
 - 5) DON'T KNOW / NOT SURE → [ARRANGE CALLBACK]
 - 6) REFUSED → [TERMINATE AS REFUSAL]
- S3.** Hello, my name is _____. I'm calling on behalf of Alan Newman Research, a national opinion research firm. We are conducting a study among Alaska residents and would like to find out your opinions on proposed cuts to services resulting from the state budget shortfall. The survey should only take about 10 minutes of your time. To make our study more representative of those living throughout Alaska, I need to speak with the [SELECT APPROPRIATE REFERENCE BASED ON SKIP PATTERN: "youngest male" OR "oldest female"] who is at home right now and is at least 18 yrs old. Are you [SELECT APPROPRIATE REFERENCE BASED ON SKIP PATTERN: "him" OR "her"]?
- 1) Person on phone is youngest male/oldest female
 - 2) Other person is youngest male/oldest female and is coming to the phone → [SKIP TO S3]
 - 3) Youngest male never available → [SKIP TO S2]
 - 4) Oldest female never available → [TERMINATE AS SCREENED OUT]
 - 5) Youngest male not available right now → [SKIP TO S2]
 - 6) Oldest female is not available right now → [ARRANGE CALLBACK]
 - 7) DON'T KNOW / NOT SURE → [ARRANGE CALLBACK]
 - 8) REFUSED → [TERMINATE AS REFUSAL]
- S4.** In order to save time and ensure I only ask you questions relevant to someone in your age group, could you tell me whether you are aged 50 or older, or are you under 50? [PROGRAMMERS: WE NEED AT LEAST 320 RESPONDENTS 50 OR OLDER.]
- 1) Age 50 or older
 - 2) Under 50
 - 3) DON'T KNOW / NOT SURE
 - 4) Refused

Budget Shortfall

Alaska is facing difficult economic choices in the coming months as the governor and legislature try to balance the state budget. The state will have an estimated one billion dollar shortfall in the budget by 2005. In an effort to balance the state budget, the governor of Alaska has eliminated or cut many state or human service programs over the past year including the elimination of the Longevity Bonus for persons age 72 and older, reducing the number of officers in the Rural Village Public Safety Program, decreasing the number of children eligible for the Denali KidCare Program, and cutting the community revenue sharing program by 22 million dollars – revenue used by rural villages and larger cities to supplement local health and social services. The governor's next proposal to reduce expenses will call for more cuts to education and human services programs.

Q1. How important is it to you for Alaska to maintain current levels of funding for education in the state? Would you say it is very important, somewhat important, not very important, or would you say it is not at all important for Alaska to maintain current levels of funding for education?

%

- 76 Very important
- 14 Somewhat important
- 6 Not very important
- 3 Not at all important
- 1 DON'T KNOW / NOT SURE
- * REFUSED

Q2. How important is it to you for Alaska to maintain current levels of funding for human service programs like health care and social services for children, low-income people, older people, and people with disabilities even if you may not currently be eligible for these services? Would you say it is very important, somewhat important, not very important, or would you say it is not at all important. [IF NECESSARY ADD: "...for Alaska to maintain current levels of funding for services for children, low income people, older persons, and people with disabilities?]

%

- 62 Very important
- 28 Somewhat important
- 6 Not very important
- 3 Not at all important
- 1 DON'T KNOW / NOT SURE
- * REFUSED

Q3. Thinking about human service programs like health care and social services for children, low-income people, older people, and people with disabilities, which comes closer to how you they should be paid for?

Do you think the costs of human services... [ROTATE ORDER]

- a.should be paid mostly by the individual receiving care**
- b.should be paid mostly by the state or**
- c.should be shared between the individual and the state government**

%

- 28 Mostly by state
- 14 Mostly by individual
- 53 Shared by state and individual
- 5 DON'T KNOW / NOT SURE
- 1 REFUSED

One approach to avoiding cuts in education and human services and balancing the state budget is to look for new ways to raise money, including raising or implementing taxes.

How strongly do you support or oppose the state finding ways to generate additional revenue if the money would be spent on education and human services?

Q4. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose finding way to generate additional revenue if the money was spent on education and human services?

%

- 43 Strongly support
- 31 Somewhat support
- 9 Somewhat oppose
- 14 Strongly oppose
- 2 DON'T KNOW / NOT SURE
- 1 REFUSED

Legislative Proposals

Now I would like to ask your opinion about some legislative proposals to generate revenue in Alaska to help balance the budget and maintain education and human services.

Currently, all cities and towns in Alaska have a sales tax except for Fairbanks and Anchorage. Another option for maintaining vital state programs and balancing the state budget is to impose a state-wide sales tax of 3 percent in all cities and towns. This tax would be in addition to the local sales tax and would apply to all products except medicine and grocery store food.

Q5. How strongly do you support or oppose Alaska imposing a state-wide sales tax of at least 3 percent on all products, except on medicine and grocery store food, to help Alaska maintain education and human services and balance the state budget? [IF NECESSARY: “Do you strongly support, somewhat support, somewhat oppose, or strongly oppose a state-wide sales tax of 3 percent on all products except medicine and grocery store food?”]

%

- 26 Strongly support
- 29 Somewhat support
- 13 Somewhat oppose
- 30 Strongly oppose
- 3 DON'T KNOW / NOT SURE
- * REFUSED

Some people are opposed to a state-wide sales tax of 3 percent because towns like Wrangell and Kodiak would face a higher sales tax since they already have a local sales tax of 6 or 7 percent.

Q6. How strongly would you support or oppose a state-wide sales tax of 3 percent even if some cities or towns in the state will have a tax rate of 9 or 10 percent? [IF NECESSARY: “Do you strongly support, somewhat support, somewhat oppose, or strongly oppose a state-wide sales tax of 3 percent even if some cities or towns in the state have a tax rate of 9 or 10 percent?”]

%

- 16 Strongly support
- 21 Somewhat support
- 16 Somewhat oppose
- 44 Strongly oppose
- 2 DON'T KNOW / NOT SURE
- * REFUSED

Some people are opposed to a state-wide sales tax of 3 percent because they say it will be a burden on low income families because they have to spend a greater part of their earnings on taxable goods than higher income families.

Q7. Knowing this, how strongly would you support or oppose a state-wide sales tax of 3 percent that would be used to maintain funding for education and human services?

%

- 22 Strongly support
- 25 Somewhat support
- 14 Somewhat oppose
- 36 Strongly oppose
- 2 DON'T KNOW / NOT SURE
- * REFUSED

For the past 20 years, Alaska has been able to use a portion of the oil revenue to help balance the state budget. This year, the governor used 400 million dollars of this reserve for that purpose. However, due to many years of borrowing and a steady decline in oil production, these reserves will be gone by 2006. One approach being considered to help balance the state budget and maintain education and human service programs is to implement a progressive state income tax – a tax system where those who earn higher incomes pay a higher tax rate than those with lower incomes. Alaska has not had an income tax in about 20 years. The money generated from a state income tax would allow Alaska to maintain its schools and human service programs. In addition, for Alaskans who itemize their taxes, a state income tax could be deducted from their federal income tax.

Q8. How strongly do you support or oppose a state-wide income tax to help maintain education and human services and balance the state budget? Do you strongly support, somewhat support, somewhat oppose, or strongly oppose a state-wide income tax to help maintain education and human services and balance the state budget?

%

- 27 Strongly support
- 24 Somewhat support
- 14 Somewhat oppose
- 33 Strongly oppose
- 2 DON'T KNOW / NOT SURE
- * REFUSED

Finally, a third option to balance the state budget is to amend the Alaska Permanent Fund. In 2001 each dividend check was about 1,800 dollars, in 2002 each check was 1,500 dollars, and this year each check was 1,107 dollars. Some legislators in Alaska think a portion of the Fund should be used to maintain education and human services and balance the state budget while others think it should continue to be used as it has been.

Q9a. How willing are you to accept a dividend check that will always equal 700 dollars so that a portion of the Fund's earnings can be used to maintain education and human services in Alaska and help balance the state budget? Are you very willing, somewhat willing, not very willing, or not willing at all to accept a dividend check that will always equal 700 dollars?

%

- 19 Very willing → [SKIP TO Q10]
- 21 Somewhat willing
- 16 Not very willing
- 42 Not willing at all
- 1 DON'T KNOW / NOT SURE
- 1 REFUSED

Q9b. How willing are you to accept a dividend check that will always equal 800 dollars so that a portion of the Fund’s earnings can be used to maintain education and human services in Alaska and help balance the state budget? [IF NECESSARY: “Are you very willing, somewhat willing, not very willing, or not willing at all to accept a dividend check that will always equal 800 dollars?”] (n=647)

- %
- 3 Very willing → [SKIP TO Q10]
 - 29 Somewhat willing
 - 17 Not very willing
 - 49 Not willing at all
 - 2 DON’T KNOW / NOT SURE
 - * REFUSED

Q9c. What about a 1000 dollars check? How willing are you to accept a dividend check that will always equal \$1000 so that a portion of the Fund’s earnings can be used to maintain education and human services in Alaska and help balance the state budget? [IF NECESSARY: “Are you very willing, somewhat willing, not very willing, or not willing at all to accept a dividend check that will always equal 1,000 dollars?”] (n=627)

- %
- 14 Very willing
 - 32 Somewhat willing
 - 12 Not very willing
 - 37 Not willing at all
 - 4 DON’T KNOW / NOT SURE
 - * REFUSED

Eliminating the permanent fund dividend checks altogether would provide about 26 billion dollars in revenue and there would be no need to impose a statewide income or sales tax for at least 20 years.

Q10a. How strongly do you support or oppose Alaska ending the Permanent Fund Dividend Check altogether if it will eliminate the need to impose a state-wide income and sales tax for at least 20 years AND prevent education and human services from being cut or eliminated and balance the state budget? Do you strongly support, somewhat support, somewhat oppose, or strongly oppose ending the Permanent Fund Dividend Check altogether?

- %
- 13 Strongly support
 - 11 Somewhat support
 - 12 Somewhat oppose
 - 62 Strongly oppose
 - 1 DON’T KNOW / NOT SURE
 - 1 REFUSED

Q10b. How strongly do you support or oppose Alaska continuing the Permanent Fund Dividend Checks even if it means the state **will have to increase** or impose taxes to maintain education and human services and programs and balance the state budget?

- %
- 48 Strongly support
 - 25 Somewhat support
 - 10 Somewhat oppose
 - 14 Strongly oppose
 - 3 DON’T KNOW / NOT SURE
 - 1 REFUSED

Q11. To help generate money for the state and avoid cuts in funding for education and human services, how strongly would you support or oppose...[REPEAT INTRO ONLY IF NECESSARY AFTER STATEMENT ‘b’]

a. Increasing the cigarette tax by 50 cents to 1 dollar and 50 cents per pack?

%
54 Strongly support
15 Somewhat support
6 Somewhat oppose
23 Strongly oppose
2 DON'T KNOW / NOT SURE
* REFUSED

b. Increasing the sales tax on beer, wine, and liquor from 10 cents per drink to no more than 15 cents drink?

%
56 Strongly support
17 Somewhat support
6 Somewhat oppose
19 Strongly oppose
1 DON'T KNOW / NOT SURE
* REFUSED

c. Increasing the sales tax on MARINE FUEL from 5 cents per gallon to no more than 10 cents per gallon?

%
19 Strongly support
22 Somewhat support
17 Somewhat oppose
36 Strongly oppose
5 DON'T KNOW / NOT SURE
* REFUSED

d. Increasing the state sales tax on GASOLINE from 8 cents per gallon to no more than 20 cents per gallon?

%
8 Strongly support
12 Somewhat support
14 Somewhat oppose
65 Strongly oppose
1 DON'T KNOW / NOT SURE
* REFUSED

e. Charging a sales tax on cruise ship passengers of at least 50 dollars per passenger?

%
40 Strongly support
24 Somewhat support
12 Somewhat oppose
20 Strongly oppose
3 DON'T KNOW / NOT SURE
* REFUSED

[IF NECESSARY: Do you strongly support, somewhat support, somewhat oppose, or strongly oppose taking this step to avoid cuts in funding for education and human services?]

Demographics

My last few questions are for classification purposes only!

D1. What is your current marital status? Are you currently.....

%

- 58 Married,
- 11 Divorced,
- 2 Separated,
- 4 Widowed,
- 23 Or have you never been married?
 - 1 Living with partner [VOLUNTEERED]
 - * DON'T KNOW / NOT SURE
 - 2 REFUSED

D2. What is your age as of your last birthday? [RECORD IN YEARS] _____

%

- 32 18-34
- 35 35-49
- 23 50-64
- 8 65 and older

D3. [ASK ONLY IF (D2 > 49 AND S4 = 2) OR (D2 < 50 AND S4=1)] Earlier in the survey I recorded that you were [INSERT ANSWER FROM S4] and now I have your age as being [INSERT ANSWER FROM D2]. Am I correct that you said you are currently [INSERT ANSWER FROM D2] years old?

- 1) Yes
- 2) No → [SKIP TO D2]
- 3) DON'T KNOW / NOT SURE
- 4) REFUSED

D4. [ASK ONLY IF D2 >49] Are you or your spouse a member of A-A-R-P? [IF NECESSARY: "This organization was formerly known as the American Association of Retired Persons."] [IF NOT "MARRIED" ASK, "Are you a member of A-A-R-P?"]

%

- 18 Yes
- 13 No
- * DON'T KNOW / NOT SURE
- 1 REFUSED

D5. Thinking about your state elections for Alaska Governor and Legislators in the last ten years, which of the following best describes your voting behavior? Would you say you always vote, sometimes miss one, rarely vote, or never vote?

%

- 51 Always vote
- 30 Sometimes miss one
- 9 Rarely vote
- 10 Never vote
- 1 DON'T KNOW / NOT SURE
- 1 REFUSED

D6. What is the highest level of education you have completed? (READ)

%

- 8 Less than high school
- 34 High school graduate or equivalent
- 29 Some college or technical training beyond high school
- 17 College graduate
- 12 or, Post-graduate or professional degree?
- * DON'T KNOW / NOT SURE
- 1 REFUSED

D7. Which of the following best describes your current employment status? Are you currently....

%

- 57 Employed full-time
- 10 Employed part-time
- 10 Retired and not working
- 6 Unemployed and looking for work
- 6 Homemaker
- 10 Or something else? [Specify: _____]
- * DON'T KNOW / NOT SURE
- 1 REFUSED

D8. Are you Hispanic, Spanish, or Latino?

%

- 5 Yes
- 94 No
- * DON'T KNOW / NOT SURE
- 1 REFUSED

D9. What is your race or ethnicity?

%

- 76 White
- 3 African America
- 3 Asian
- 9 Native American
- 7 Some Other Race [Specify: _____]
- * DON'T KNOW / NOT SURE
- 3 REFUSED

D10. Now, for statistical purposes only, please stop me when I get to the category that includes your household's income before taxes in 2002. Was it... (READ)

%

- 5 Less than \$10,000
- 10 \$10,000 but less than \$20,000
- 12 \$20,000 but less than \$30,000
- 13 \$30,000 but less than \$40,000
- 10 \$40,000 but less than \$50,000
- 20 \$50,000 but less than \$75,000
- 20 or was your income \$75,000 or more
- 4 DON'T KNOW
- 7 REFUSED

D11. What is your 5-digit zipcode? _ _ _ _ _

D12. In what borough/city in Alaska do you reside?
[INTERVIEWERS: ALASKA DOES NOT HAVE COUNTIES]

D13. And, finally, may I verify that I reached you at: () _____

*That was our last question. **Thank you** for taking the time to help us out with this study.
Have a great night!*

D14. RECORD GENDER OF RESPONDENT:

<u>%</u>	
52	Male
48	Female

AARP

Knowledge Management

For more information contact Jennifer H. Sauer (202) 434-6207