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1. Which of the following best applies to you?

		Downsized		
	Total	Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Respondents (unwtd)</b>	<b>1870</b>	<b>319</b>	<b>650</b>	<b>901</b>
<b>Base: All Respondents (wtd)</b>	<b>1866</b>	<b>345</b>	<b>626</b>	<b>895</b>
Have downsized my home	345	345	-	-
	18%	100%	-	-
		BC		
Plan to downsize (Net)	626	-	626	-
	34%	-	100%	-
			AC	
Haven't downsized yet, but plan to do so in the next 5 years	352	-	352	-
	19%	-	56%	-
			AC	
Haven't downsized yet, but plan to do so in over 5 years from now	274	-	274	-
	15%	-	44%	-
			AC	
Do not plan to downsize my home	895	-	-	895
	48%	-	-	100%
				AB
Sigma	1866	345	626	895
	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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2\_1. Please let us know if the following applies to you or not. - I moved to a new city/town when I downsized my home

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>319</b>	<b>319</b>	-	-
<b>Base: All Answering (wtd)</b>	<b>345</b>	<b>345</b>	-	-
Yes	173	173	-	-
	50%	50%	-	-
No	172	172	-	-
	50%	50%	-	-
Sigma	345	345	-	-
	100%	100%	-	-

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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2\_2. Please let us know if the following applies to you or not. - I plan to move to a new city/town when downsizing my home

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>650</b>	-	<b>650</b>	-
<b>Base: All Answering (wtd)</b>	<b>626</b>	-	<b>626</b>	-
Yes	212	-	212	-
	34%	-	34%	-
No	414	-	414	-
	66%	-	66%	-
Sigma	626	-	626	-
	100%	-	100%	-

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_1. To what extent do you agree or disagree with each of the following statements? - I am happy with my current home or living arrangement

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Respondents (unwtd)</b>	<b>1870</b>	<b>319</b>	<b>650</b>	<b>901</b>
<b>Base: All Respondents (wtd)</b>	<b>1866</b>	<b>345</b>	<b>626</b>	<b>895</b>
Top 2 Box (Net)	1610	314	463	833
	86%	91%	74%	93%
		B		B
Strongly agree	1044	223	232	589
	56%	65%	37%	66%
		B		B
Somewhat agree	566	92	230	244
	30%	27%	37%	27%
			AC	
Neither agree nor disagree	134	17	90	27
	7%	5%	14%	3%
			AC	
Bottom 2 Box (Net)	122	14	73	35
	7%	4%	12%	4%
			AC	
Somewhat disagree	74	7	53	14
	4%	2%	8%	2%
			AC	
Strongly disagree	48	7	20	20
	3%	2%	3%	2%
Sigma	1866	345	626	895
	100%	100%	100%	100%

Statistics:

Overlap formulae used

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- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_2. To what extent do you agree or disagree with each of the following statements? - I regret downsizing my home

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>319</b>	<b>319</b>	-	-
<b>Base: All Answering (wtd)</b>	<b>345</b>	<b>345</b>	-	-
Top 2 Box (Net)	26 8%	26 8%	-	-
Strongly agree	4 1%	4 1%	-	-
Somewhat agree	22 7%	22 7%	-	-
Neither agree nor disagree	31 9%	31 9%	-	-
Bottom 2 Box (Net)	288 83%	288 83%	-	-
Somewhat disagree	72 21%	72 21%	-	-
Strongly disagree	216 63%	216 63%	-	-
Sigma	345 100%	345 100%	-	-

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_3. To what extent do you agree or disagree with each of the following statements? - The costs incurred as a result of downsizing was more than expected

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>319</b>	<b>319</b>	-	-
<b>Base: All Answering (wtd)</b>	<b>345</b>	<b>345</b>	-	-
Top 2 Box (Net)	93 27%	93 27%	-	-
Strongly agree	13 4%	13 4%	-	-
Somewhat agree	80 23%	80 23%	-	-
Neither agree nor disagree	84 24%	84 24%	-	-
Bottom 2 Box (Net)	168 49%	168 49%	-	-
Somewhat disagree	115 33%	115 33%	-	-
Strongly disagree	53 15%	53 15%	-	-
Sigma	345 100%	345 100%	-	-

Statistics:

Overlap formulae used

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- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_4. To what extent do you agree or disagree with each of the following statements? - Downsizing my home was more trouble than it's worth

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>319</b>	<b>319</b>	-	-
<b>Base: All Answering (wtd)</b>	<b>345</b>	<b>345</b>	-	-
Top 2 Box (Net)	27 8%	27 8%	-	-
Strongly agree	7 2%	7 2%	-	-
Somewhat agree	20 6%	20 6%	-	-
Neither agree nor disagree	72 21%	72 21%	-	-
Bottom 2 Box (Net)	246 71%	246 71%	-	-
Somewhat disagree	108 31%	108 31%	-	-
Strongly disagree	138 40%	138 40%	-	-
Sigma	345 100%	345 100%	-	-

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_5. To what extent do you agree or disagree with each of the following statements? - Downsizing my home was a great decision

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>319</b>	<b>319</b>	-	-
<b>Base: All Answering (wtd)</b>	<b>345</b>	<b>345</b>	-	-
Top 2 Box (Net)	303	303	-	-
	88%	88%	-	-
Strongly agree	199	199	-	-
	58%	58%	-	-
Somewhat agree	104	104	-	-
	30%	30%	-	-
Neither agree nor disagree	28	28	-	-
	8%	8%	-	-
Bottom 2 Box (Net)	14	14	-	-
	4%	4%	-	-
Somewhat disagree	8	8	-	-
	2%	2%	-	-
Strongly disagree	6	6	-	-
	2%	2%	-	-
Sigma	345	345	-	-
	100%	100%	-	-

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_6. To what extent do you agree or disagree with each of the following statements? - The cost of downsizing a home is worth it

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Respondents (unwtd)</b>	<b>1870</b>	<b>319</b>	<b>650</b>	<b>901</b>
<b>Base: All Respondents (wtd)</b>	<b>1866</b>	<b>345</b>	<b>626</b>	<b>895</b>
Top 2 Box (Net)	873 47%	287 83%	390 62%	196 22%
		BC	C	
Strongly agree	241 13%	136 40%	77 12%	28 3%
		BC	C	
Somewhat agree	631 34%	151 44%	313 50%	168 19%
		C	C	
Neither agree nor disagree	734 39%	40 12%	192 31%	502 56%
			A	AB
Bottom 2 Box (Net)	259 14%	18 5%	44 7%	197 22%
				AB
Somewhat disagree	197 11%	11 3%	40 6%	146 16%
				AB
Strongly disagree	62 3%	6 2%	5 1%	51 6%
				B
Sigma	1866 100%	345 100%	626 100%	895 100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_7. To what extent do you agree or disagree with each of the following statements? - The cost of downsizing a home is expensive

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Respondents (unwtd)</b>	<b>1870</b>	<b>319</b>	<b>650</b>	<b>901</b>
<b>Base: All Respondents (wtd)</b>	<b>1866</b>	<b>345</b>	<b>626</b>	<b>895</b>
Top 2 Box (Net)	595 32%	84 24%	196 31%	315 35%
Strongly agree	77 4%	13 4%	14 2%	50 6%
Somewhat agree	517 28%	71 21%	181 29%	265 30%
Neither agree nor disagree	808 43%	122 35%	248 40%	439 49%
Bottom 2 Box (Net)	463 25%	139 40%	183 29%	142 16%
Somewhat disagree	378 20%	101 29%	152 24%	125 14%
Strongly disagree	85 5%	38 11%	31 5%	16 2%
Sigma	1866 100%	345 100%	626 100%	895 100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_9. To what extent do you agree or disagree with each of the following statements? - I need the money from my home in order to live comfortably in retirement

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Respondents (unwtd)</b>	<b>1870</b>	<b>319</b>	<b>650</b>	<b>901</b>
<b>Base: All Respondents (wtd)</b>	<b>1866</b>	<b>345</b>	<b>626</b>	<b>895</b>
Top 2 Box (Net)	571 31%	141 41%	258 41%	173 19%
		C	C	
Strongly agree	147 8%	33 10%	72 11%	42 5%
		C	C	
Somewhat agree	424 23%	108 31%	186 30%	130 15%
		C	C	
Neither agree nor disagree	457 24%	86 25%	127 20%	245 27%
				B
Bottom 2 Box (Net)	838 45%	118 34%	242 39%	478 53%
				AB
Somewhat disagree	456 24%	52 15%	151 24%	253 28%
			A	A
Strongly disagree	382 20%	67 19%	90 14%	225 25%
				B
Sigma	1866 100%	345 100%	626 100%	895 100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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3\_10. To what extent do you agree or disagree with each of the following statements? - I'm skeptical that downsizing will actually save me money

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>1551</b>	-	<b>650</b>	<b>901</b>
<b>Base: All Answering (wtd)</b>	<b>1521</b>	-	<b>626</b>	<b>895</b>
Top 2 Box (Net)	595	-	180	415
	39%	-	29%	46%
				B
Strongly agree	102	-	20	82
	7%	-	3%	9%
				B
Somewhat agree	492	-	160	332
	32%	-	26%	37%
				B
Neither agree nor disagree	519	-	199	320
	34%	-	32%	36%
Bottom 2 Box (Net)	407	-	247	160
	27%	-	39%	18%
			C	
Somewhat disagree	330	-	192	138
	22%	-	31%	15%
			C	
Strongly disagree	77	-	55	22
	5%	-	9%	3%
			C	
Sigma	1521	-	626	895
	100%	-	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

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4. Why did you downsize / do you plan to downsize your home?

	Total	Downsized		
		Have downsized	Plan to downsize	Not downsizing
		A	B	C
<b>Base: All Answering (unwtd)</b>	<b>969</b>	<b>319</b>	<b>650</b>	<b>-</b>
<b>Base: All Answering (wtd)</b>	<b>971</b>	<b>345</b>	<b>626</b>	<b>-</b>
Too expensive to remain in home	170	90	81	-
	18%	26%	13%	-
Too much maintenance in home	495	164	331	-
	51%	48%	53%	-
House is too big	453	169	284	-
	47%	49%	45%	-
Children moved out	213	86	127	-
	22%	25%	20%	-
Use income from sale to finance retirement	193	64	129	-
	20%	19%	21%	-
Use income from sale to finance other purchases	108	55	53	-
	11%	16%	8%	-
Other	139	62	77	-
	14%	18%	12%	-
Sigma	1771	689	1082	-
	182%	200%	173%	-

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B/C

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

- Column Means:

Columns Tested (5%): A/B/C

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