

QA4\_3. [I am optimistic that I will have a comfortable lifestyle when I retire] Now I'm going to read you a list of statements and, for each one, I would like you to tell me how well the statement describes your own feelings. Please tell me if you 'strongly agree', 'somewhat agree', 'neither agree nor disagree', 'somewhat disagree' or 'strongly disagree'.

Proportions/Mean: Columns Tested (5% risk level) - A/B - A/C - A/D - A/E - A/F - A/G - A/H - A/I - A/J - A/K - A/L - A/M - A/N - A/O - A/P - A/Q - A/R - A/S - A/T  
Overlap formulae used. \* small base

	Total A
Base: All respondents	1200
Weighted	1200
(5) Strongly agree	528 44.0%
(4) Somewhat agree	449 37.4%
(3) Neither agree nor disagree	70 5.8%
(2) Somewhat disagree	98 8.1%
(1) Strongly disagree	48 4.0%
(DK/NS)	7 0.6%
Top2Box (Strongly/ Somewhat agree)	977 81.4%
Low2Box (Strongly/ Somewhat disagree)	146 12.2%
Mean	4.1
Std Dev	1.1
Std Err	0

**QB4. [SUMMARY - TOP3BOX (8-10)]** *There are many things that people consider when they decide it is time to retire. Using a scale of 1 to 10, where 1 means it was not at all important and 10 means it was extremely important, how important were each of the following considerations when you were planning when you would retire?/ when you think about when you will retire?*

Proportions/Mean: Columns Tested (5% risk level) - A/B - A/C - A/D - A/E - A/F - A/G - A/H - A/I - A/J - A/K - A/L - A/M - A/N - A/O - A/P - A/Q - A/R - A/S - A/T  
Overlap formulae used. \* small base

	Total
Base: All respondents	1200
Weighted	1200
Determining the amount of money that you need in savings or investments in order for you to have a comfortable retirement	824 68.7%
Determining potential health care requirements.	724 60.4%
Determining the amount of money that you need in savings or investments in order for you to afford the 'little extras' that are part of your lifestyle	695 57.9%
Planning where you will live when you are retired	567 47.2%
Planning what you would do in retirement, such as travel, volunteer work, etc.	550 45.9%
Ensuring that your parents will be taken care of as they age	529 44.1%
Reaching the right age	522 43.5%
Waiting until your children are no longer your financial responsibility	514 42.8%
Thinking it's time to think about yourself and not everyone else	485 40.4%
Considering how retirement would impact your relationship with your spouse.	483 40.2%
Determining what you would need to support the needs of your children or grandchildren	463 38.6%
Getting tired of working	461 38.4%
Creating a plan for when and how you would leave your job	454 37.8%

**QB6A. And what amount did/ do you think you need to have saved in order for you to have a comfortable retirement?**

Proportions/Means: Columns Tested (5% risk level) - A/B - A/C - A/D - A/E - A/F - A/G - A/H - A/I - A/J - A/K - A/L - A/M - A/N - A/O - A/P - A/Q - A/R - A/S - A/T  
 Overlap formulae used. \* small base; \*\* very small base (under 30) ineligible for sig testing

	Total	Retired	
		Yes	No
Base: Had/ Have determined the amount of money for retirement	582	162	387
Weighted	535	148	360
<\$500,000	240 44.7%	80 53.7%	145 40.3%
\$500,000 - \$999,999	83 15.5%	18 12.4%	62 17.3%
\$1 million - \$2,999,999	106 19.8%	16 10.9%	88 24.4%
\$3 million - \$4,999,999	13 2.4%	1 0.7%	10 2.8%
\$5 million+	7 1.3%	1 1.0%	6 1.6%
(DK/NS)	144 26.9%	46 31.1%	90 25.0%
Mean	762413	448772	895709
Std. Dev.	1087651.0	741056.6	1173144.5
Std. Err.	52883.4	69712.7	69491.1
Median	500000.0	200000.0	500000.0

## QB6A. And what amount do you think you need to have saved in order for you to have a comfortable retirement?

Proportions/Mean: Columns Tested (5% risk level) - A/B/C/D/E/F/G/H/I - J/K/L/M/N/O - P/Q - R/S Overlap formulae used. \* small base; \*\* very small base (under 30) ineligible for sig testing

	Total Pre-Retirees	Gender	
		Male P	Female Q
Base: Had/ Have determined the amount of money for retirement	387	180	207
Weighted	360	182	178
<\$500,000	145 40%	71 39%	74 42%
\$500,000 - \$999,999	62 17%	35 19%	27 15%
\$1 million - \$2,999,999	88 24%	59 32%	29 16%
\$3 million - \$4,999,999	10 3%	8 4%	2 1%
\$5 million+	6 2%	3 2%	2 1%
(DK/NS)	90 25%	28 15%	62 35%
Summary			
Mean	895709	1062270	674687
Std. Dev.	1173144.5	1325530.6	891898.5
Std. Err.	69491.1	108229.1	76762.4
Median	500000	750000	500000

**QB10. What is, or what do you expect to be, the single, largest source of income during your retirement?**

Proportions/Mean: Columns Tested (5% risk level) - A/B - A/C - A/D - A/E - A/F - A/G - A/H - A/I - A/J - A/K - A/L - A/M - A/N - A/O - A/P - A/Q - A/R - A/S - A/T  
Overlap formulae used. \* small base

	Total
Base: All respondents	1200
Weighted	1200
Pension income from an employer	335 28.0%
Income from your own investments	328 27.4%
Government pension income	207 17.2%
Money obtained by cashing in your investments	112 9.4%
Part-time or occasional work	53 4.4%
Money obtained by selling a house or making use of home equity	50 4.2%
Income from a spouse or partner who continues to work	31 2.6%
RRSP	11 0.9%
Inheritance	6 0.5%
Savings	3 0.3%
Other	30 2.5%
Nothing	2 0.2%
(DK/NS)	37 3.1%

QG5C. Do you expect to have to use some of your retirement savings to pay for health care?

Proportions/Mean: Columns Tested (5% risk level) - A/B - A/C - A/D - A/E - A/F - A/G - A/H - A/I - A/J - A/K - A/L - A/M - A/N - A/O - A/P - A/Q - A/R - A/S - A/T  
Overlap formulae used. \* small base

	Total
Base: All respondents	1200
Weighted	1200
Yes	582
	48.5%
No	594
	49.5%
(DK/NS)	24
	2.0%