

1. Do you have a plan as to when you would like to retire from your current job?

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Yes	420 52%	225 58% B	196 47%	170 47%	163 55%	87 59% C	20 41%	97 43%	219 56% G	84 60% FG
No	384 48%	164 42%	219 53% A	189 53% E	135 45%	60 41%	29 59% I	128 57% HI	171 44%	56 40%

1a. And have you shared that information with your employer?

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base; ** very small base (under 30) ineligible for sig testing

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed, have plan to retire	425	220	205	175	163	87	22	95	224	84
Weighted	420	225	196	170	163	87*	20**	97*	219	84*
Yes	133 32%	68 30%	65 33%	50 29%	59 36%	24 28%	7 34%	23 23%	79 36% G	24 29%
No	287 68%	157 70%	130 67%	120 71%	104 64%	63 72%	13 66%	74 77% H	140 64%	60 71%

2. Which of the following scenarios best illustrates your ideal retirement circumstance at your current job?

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	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
A hard stop at a specific time where you can exit the company and then go on to do whatever you want	297 37%	159 41% B	139 33%	134 37%	108 36%	55 38%	13 26%	87 39%	141 36%	57 41%
An easing into retirement where you could start working flexible hours or part time leading up to a specific time where you can exit the company...	275 34%	119 31%	155 37% A	139 39% E	99 33%	38 25%	25 51% GHI	77 34%	132 34%	41 29%
Staying on with your current employer after what would normally be considered a stop date so you could continue to work for a full or part-time duration.	232 29%	111 28%	121 29%	86 24%	91 31%	55 37% C	11 23%	60 27%	118 30%	42 30%

2a. And would that mainly be full or part-time?

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base; ** very small base (under 30) ineligible for sig testing

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Staying on with current employer	236	108	128	90	91	55	12	62	120	42
Weighted	232	111	121	86*	91*	55*	11**	60*	118	42*
Part time	136 59%	59 53%	77 63%	54 63%	54 59%	28 51%	10 92%	33 56%	73 61%	20 46%
Full time	96 41%	52 47%	44 37%	32 37%	38 41%	27 49%	1 8%	27 44%	46 39%	23 54%

2b. And how long would you ideally want this extended circumstance to continue

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	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Staying on with current employer	236	108	128	90	91	55	12	62	120	42
Weighted	232	111	121	86*	91*	55*	11**	60*	118	42*
1 year	8 3%	4 4%	4 3%	4 4%	3 4%	1 2%	1 9%	2 3%	4 3%	1 3%
2 years	23 10%	11 10%	12 10%	5 6%	12 13%	7 12%	2 17%	5 9%	10 9%	6 14%
3 years	32 14%	15 13%	17 14%	11 12%	9 10%	13 23% D	2 15%	5 9%	21 18%	4 9%
4 years	7 3%	4 4%	3 3%	3 3%	3 4%	1 2%	0 -	2 4%	4 3%	1 2%
5 years	69 30%	35 32%	34 28%	25 29%	28 30%	16 30%	3 26%	18 29%	35 30%	14 33%
More than 5 years	92 40%	42 38%	50 41%	39 45%	36 40%	17 31%	4 34%	28 46%	44 37%	17 39%

3_1. (I have a well thought out and developed financial plan for the years after I reach the age of 65) To what extent do you agree or disagree with the following statements:

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Strongly agree	115 14%	51 13%	65 16%	39 11%	51 17% C	26 17% C	8 16%	32 14%	50 13%	25 18%
Somewhat agree	318 40%	164 42%	154 37%	139 39%	114 38%	66 44%	14 28%	88 39%	161 41%	55 39%
Somewhat disagree	208 26%	99 25%	108 26%	101 28%	75 25%	32 22%	13 27%	62 28%	97 25%	36 25%
Strongly disagree	163 20%	75 19%	88 21%	80 22%	59 20%	24 17%	14 29%	42 19%	82 21%	25 18%
Summary										
Top2Box (Agree)	433 54%	215 55%	218 53%	177 49%	165 55%	91 62% C	22 44%	120 54%	212 54%	80 57%
Low2Box (Disagree)	371 46%	174 45%	197 47%	181 51% E	134 45%	56 38%	28 56%	104 46%	179 46%	61 43%

3_2. (I have a well thought out and developed life plan as to what I am going to with myself for my life's next steps in the years after I reach the age of 65) To what extent do you agree or disagree with the following statements:

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Strongly agree	119 15%	55 14%	64 15%	43 12%	53 18% C	24 16%	10 20%	31 14%	56 14%	23 16%
Somewhat agree	343 43%	177 46%	166 40%	145 40%	121 40%	78 53% CD	15 31%	94 42%	172 44%	62 44%
Somewhat disagree	208 26%	101 26%	107 26%	105 29% E	82 28% E	21 14%	12 25%	62 28%	96 25%	37 27%
Strongly disagree	133 17%	56 14%	78 19%	66 19%	43 14%	24 17%	12 25%	37 16%	66 17%	18 13%
Summary										
Top2Box (Agree)	462 58%	232 60%	230 55%	187 52%	173 58%	102 69% CD	25 50%	125 56%	228 58%	85 60%
Low2Box (Disagree)	342 42%	157 40%	185 45%	171 48% E	125 42% E	45 31%	24 50%	99 44%	163 42%	55 40%

3_3. (I am scared to raise my retirement plan with my employer because I might not be treated well in the interim) To what extent do you agree or disagree with the following statements:

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Strongly agree	54 7%	30 8%	24 6%	19 5%	22 7%	13 9%	3 6%	18 8%	25 6%	8 6%
Somewhat agree	123 15%	63 16%	60 14%	53 15%	47 16%	23 16%	14 28% GHI	34 15%	60 15%	15 10%
Somewhat disagree	253 31%	128 33%	125 30%	126 35% E	90 30%	37 25%	16 32%	71 32%	111 28%	55 39% H
Strongly disagree	375 47%	169 43%	206 50%	161 45%	139 47%	75 51%	17 35%	101 45%	194 50% F	62 44%
Summary										
Top2Box (Agree)	176 22%	93 24%	84 20%	72 20%	69 23%	36 24%	17 34% I	52 23%	85 22%	23 16%
Low2Box (Disagree)	628 78%	296 76%	331 80%	287 80%	229 77%	112 76%	33 66%	172 77%	305 78%	117 84% F

3_4. (Our company would benefit from a standard, third party, professionally run program put in place...) To what extent do you agree or disagree with the following statements:

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Strongly agree	153 19%	82 21%	71 17%	65 18%	58 19%	30 21%	7 15%	44 20%	73 19%	29 21%
Somewhat agree	317 39%	154 39%	164 39%	147 41%	122 41%	49 33%	16 32%	76 34%	170 44%	55 39%
Somewhat disagree	182 23%	86 22%	96 23%	80 22%	63 21%	39 26%	14 28%	56 25%	78 20%	35 25%
Strongly disagree	151 19%	68 18%	83 20%	66 18%	56 19%	30 20%	12 25%	49 22%	69 18%	21 15%
Summary										
Top2Box (Agree)	470 59%	235 60%	235 57%	212 59%	179 60%	79 54%	23 47%	120 53%	243 62%	85 60%
Low2Box (Disagree)	334 41%	154 40%	180 43%	146 41%	119 40%	68 46%	26 53% H	105 47% H	147 38%	56 40%

3_5. (Talking about retirement and options with my employer would likely be awkward and sometimes difficult) To what extent do you agree or disagree with the following statements:

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Strongly agree	96 12%	50 13%	46 11%	43 12%	35 12%	17 12%	4 7%	29 13%	46 12%	18 13%
Somewhat agree	185 23%	95 24%	91 22%	77 21%	76 25%	33 22%	16 33%	57 26%	83 21%	29 21%
Somewhat disagree	239 30%	112 29%	127 31%	110 31%	88 29%	41 28%	13 27%	67 30%	117 30%	42 30%
Strongly disagree	283 35%	133 34%	150 36%	128 36%	99 33%	56 38%	16 33%	72 32%	144 37%	52 37%
Summary										
Top2Box (Agree)	281 35%	144 37%	137 33%	120 33%	111 37%	50 34%	20 40%	86 38%	129 33%	47 33%
Low2Box (Disagree)	523 65%	245 63%	278 67%	238 67%	187 63%	97 66%	30 60%	138 62%	261 67%	94 67%

3. (Top2box (Agree) Summary) To what extent do you agree or disagree with the following statements:

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Our company would benefit from a standard, third party, professionally run program put in place...	470 59%	235 60%	235 57%	212 59%	179 60%	79 54%	23 47%	120 53%	243 62% FG	85 60%
I have a well thought out and developed life plan as to what I am going to with myself for my life's next steps in the years after I reach the age of 65	462 58%	232 60%	230 55%	187 52%	173 58%	102 69% CD	25 50%	125 56%	228 58%	85 60%
I have a well thought out and developed financial plan for the years after I reach the age of 65	433 54%	215 55%	218 53%	177 49%	165 55%	91 62% C	22 44%	120 54%	212 54%	80 57%
Talking about retirement and options with my employer would likely be awkward and sometimes difficult	281 35%	144 37%	137 33%	120 33%	111 37%	50 34%	20 40%	86 38%	129 33%	47 33%
I am scared to raise my retirement plan with my employer because I might not be treated well in the interim	176 22%	93 24%	84 20%	72 20%	69 23%	36 24%	17 34% I	52 23%	85 22%	23 16%

3. (Low2box (Disagree) Summary) To what extent do you agree or disagree with the following statements:

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
I am scared to raise my retirement plan with my employer because I might not be treated well in the interim	628 78%	296 76%	331 80%	287 80%	229 77%	112 76%	33 66%	172 77%	305 78%	117 84% F
Talking about retirement and options with my employer would likely be awkward and sometimes difficult	523 65%	245 63%	278 67%	238 67%	187 63%	97 66%	30 60%	138 62%	261 67%	94 67%
I have a well thought out and developed financial plan for the years after I reach the age of 65	371 46%	174 45%	197 47%	181 51% E	134 45%	56 38%	28 56%	104 46%	179 46%	61 43%
I have a well thought out and developed life plan as to what I am going to with myself for my life's next steps in the years after I reach the age of 65	342 42%	157 40%	185 45%	171 48% E	125 42% E	45 31%	24 50%	99 44%	163 42%	55 40%
Our company would benefit from a standard, third party, professionally run program put in place...	334 41%	154 40%	180 43%	146 41%	119 40%	68 46%	26 53% H	105 47% H	147 38%	56 40%

4. Now, some companies have begun offering an intensive workshop for soon to be retirees. It's specifically created in response to the lack of information and programs dealing with the life changes facing baby boomers. It's offered by your employer either directly or as part of your benefit package and is conducted by an outside professional. Employees create a lifestyle plan for post retirement using proven analysis tools, interactive workshop techniques, and a facilitated debriefing. This workshop gives you the starting point for a discussion with your employer about your retirement plans. This way, both you and your employer know what to expect for the future. How likely would it be that you would participate in this type of program if it were offered to you?

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E - F/G/H/I Overlap formulae used. * small base

	Total	GENDER		AGE			EDUCATION			
		Male	Female	50-54	55-59	60-64+	<HS	HS	Post Sec	Univ Grad
		A	B	C	D	E	F	G	H	I
Base: Employed	804	375	429	361	295	148	51	222	393	138
Weighted	804	389	415	358	298	147	49*	224	390	140
Very likely	258 32%	131 34%	127 31%	121 34%	91 31%	46 32%	10 20%	62 28%	127 33%	59 42% FGH
Somewhat likely	318 40%	168 43%	150 36%	146 41%	120 40%	52 35%	19 38%	93 42%	157 40%	49 35%
Not very likely	139 17%	59 15%	81 19%	61 17%	48 16%	30 21%	9 19%	41 18%	63 16%	26 19%
Not at all likely	89 11%	32 8%	57 14% A	30 8%	40 13% C	19 13%	11 23% HI	28 13% I	44 11% I	5 4%
Summary										
Top2Box (Likely)	576 72%	299 77% B	278 67%	267 75%	211 71%	98 67%	29 58%	155 69%	284 73% F	109 77% F
Low2Box (Not likely)	228 28%	91 23%	137 33% A	91 25%	87 29%	49 33%	21 42% HI	69 31%	107 27%	32 23%