

Retirement

For this survey we are interested in people's opinions and experiences with some different issues relating to work and retirement.

Occupation Demo's

1. Which of the following very broad categories best describes the kind of work you are doing right now? (Please try to choose the category that is closest to the type of work you do, even if not an exact fit.)

Professional – examples: nurse, engineer, teacher, CA

“Knowledge/Creative” occupations – examples: HR, marketing, research

Manager/Executive – examples: store manager, business exec.

IT/Information Technology

Office work/Admin – examples: receptionist, EA, clerk

Sales&Service/Retail/Hospitality

Skilled Trade – examples: electrician, plumber, carpenter

Labour – examples: driver, landscaping, construction, warehouse

Business owner

Looking for work

Not employed/student/homemaker

Semi-retired

Retired

Have never worked

Other, please specify...

[ASK ALL THOSE CURRENTLY WORKING:]

1a. And, which broad sector best describes where you are currently employed?

Public sector (government departments, government agencies, public services such as school system or university or healthcare)

Private sector (any for-profit business)

Not-for-profit/charitable

1b. Do you yourself belong to a labour union, or a professional association that bargains collectively on behalf of its membership?

Yes, belong to a union

Yes, belong to a professional association

No, do not belong to a union

1c. Are you responsible for directly managing any other staff at your workplace? If so, how many?

No, do not manage others
Yes, manage 1 to 5 people
Yes, between 6 and 20 people
Yes, more than 20 people

[ASK ALL THOSE CURRENTLY RETIRED/SEMI RETIRED]

1aa. And, which broad sector best describes your primary or main job when you were working?

Public sector (government departments, government agencies, public services such as school system or university or healthcare)
Private sector (any for-profit business)
Not-for-profit/charitable

1bb. For the majority of your career, did you yourself belong to a labour union, or a professional association that bargains collectively on behalf of its membership?

Yes, belonged to a union
Yes, belonged to a professional association
No, did not belong to a union

1cc. Were you responsible for directly managing any other staff at your workplace? If so, how many?

No, did not manage others
Yes, managed 1 to 5 people
Yes, between 6 and 20 people
Yes, more than 20 people

Retirement

Now, we want to turn from these work issues to the subject of retirement.
If you are already retired, we'll be wanting to know about your experiences.
For those not yet retired, we're interested in people's hopes and expectations.

1. EXCLUDING good health and enough money to do the things you would like, please pick up to three things that you think will make retirement meaningful and vital, or if you are already retired, what is making retirement meaningful and vital.

[RANDOMIZE]

A rich spiritual life
Quality time with family
Volunteering
Travel
Socializing with friends

Participating in leisure activities
Rest and relaxation
Part time paid work

Already Retired Questionnaire (asked of those who answered Semi or Retired in Q1)

We have a few specific questions about your retirement.

2. At what age did you retire from your primary occupation?

50 or younger
51-55
56 – 60
61 - 65
66 or older

3. Did you control the circumstances around your retirement or did circumstances result in you retiring earlier or later than you may have planned? For example, health or family issues or being laid off.

I retired earlier due at least partly to circumstances outside my control
I retired when and as planned
I retired later due at least partly to circumstances outside my control

4. We would like to get a broad understanding of how Canadians are faring in retirement. Which of the following categories best describes your situation:

I have enough money to do everything I want
I live comfortably but don't have money for extras
Making ends meet is a struggle

5. How are you **primarily** financing your retirement (if you have a spouse please consider you and your spouse together)?

Choose up to 3

[RANDOMIZE]

Work pension
Your retirement savings (RRSPs, etc)
Investments
Downsizing/selling assets
Inheritance
Support from children/family
Government pension (Old Age pension)
Other, specify:....

Q6. Please indicate whether you agree or disagree, strongly or moderately, with each of the following statements.

[RANDOMIZE]

I enjoy having enough time to do the hobbies I have always wanted to do

Health issues have not held me back from doing what I want to do

I feel connected and involved in my community

There are times when I miss going to work

I feel like my life does not have as much meaning now that I'm retired

I wish there were better volunteer opportunities for people like me

I am bored and have trouble filling my days

I love relaxing and not having to be anywhere

I'm worried about my money lasting my lifetime

I am not able to spend as much time with my family as I would like

Agree strongly

Agree moderately

Disagree moderately

Disagree strongly

Q7. With the same list we started with, again EXCLUDING good health and enough money to do the things you would like, is there anything about retirement that did not happen or that did not measure up as you had hoped?

[Choose up to 3]

[RANDOMIZE]

A rich spiritual life

Quality time with family

Volunteering

Travel

Socializing with friends

Participating in leisure activities

Rest and relaxation

None of these, all measured up

Not yet retired Questionnaire [ASK ALL NOT RETIRED]

2. At what age do you **expect** to retire?

50 or younger

51-55

56 – 60

61 - 65

66 or older

Never

2b. And if it was entirely in your hands at what age would you prefer to retire?

50 or younger

51-55

56 – 60

61 - 65

66 or older

Never

3. Which of the following broad categories best describes your expectations for your personal finances in retirement:

I expect to have enough money to do everything I want

I expect to live comfortably but not have money for luxuries

I expect that making ends meet will be a struggle

4. How will your retirement **primarily** be financed (if you have a spouse please consider you and your spouse together)?

[Choose up to 2]

[RANDOMIZE]

Work pension

Your retirement savings (RRSPs etc.)

Investments

Downsizing/selling assets

Inheritance

Support from children/family

Government pension

Other specify:.....

Q5. Thinking ahead to your retirement, please indicate whether you agree or disagree, strongly or moderately, with each of the following statements.

[RANDOMIZE]

I look forward to having enough time to do the hobbies I have always wanted to do

I don't think health issues will hold me back from doing what I want to do

I will feel connected and involved in my community

There will be times when I miss going to work

I won't feel like my life has as much meaning when I'm retired

I will want better volunteer opportunities for people like me

I will be bored and have trouble filling my days

I look forward to relaxing and not having to be anywhere

I'm worried about my money lasting my lifetime

I am worried I won't be able to spend as much time with my family as I would like

Strongly agree

Moderately agree

Moderately disagree

Strongly disagree