

**PEW SOCIAL & DEMOGRAPHIC TRENDS TOPLINE**

Feb 23 - March 23, 2009 AGING SURVEY

TOTAL N=2,969

Age 65+ N=1,332

Adults with Parents age 65+ N=807

**NOTE: ALL NUMBERS ARE PERCENTAGES. THE PERCENTAGES LESS THAN .5 % (INCLUDING ZERO) ARE REPLACED BY AN ASTERISK (\*). COLUMNS/ROWS MAY NOT TOTAL 100% DUE TO ROUNDING. ALL TRENDS REFERENCE SURVEYS FROM SOCIAL & DEMOGRAPHIC TRENDS AND THE PEW RESEARCH CENTER FOR THE PEOPLE & THE PRESS UNLESS OTHERWISE NOTED.**

Q.2 Please tell me whether, on the whole, you are very satisfied, somewhat satisfied, somewhat DISsatisfied, or very dissatisfied with the following aspects of your life: (First/Next) **(INSERT ITEM; RANDOMIZE ITEMS A thru E: items a-c always asked first and items d & e always last)** **(READ FOR FIRST ITEM, THEN AS NECESSARY: are you very satisfied, somewhat satisfied, somewhat DIS satisfied, or very dissatisfied?)**

a. Your personal financial situation

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
23	Very satisfied	19	24	22	31
43	Somewhat satisfied	45	43	45	38
18	Somewhat dissatisfied	21	18	17	13
13	Very dissatisfied	14	14	14	11
*	Doesn't apply (VOL.)	*	*	*	*
3	Don't know/Refused (VOL.)	*	1	3	6

**Q.13 AND Q.14 ASK ONLY THOSE UNDER AGE 65 (Q.8<65 or Q.8a=1): [N=1,631]**

Now thinking about the future...

Q.13 Here are some good things about getting older. For each one, please tell me if this is something that you expect will happen to you when you are older or not. First, do you think you will **[INSERT ITEM; RANDOMIZE]** when you are older or not? How about **[INSERT NEXT ITEM]**? **[READ ONLY IF NECESSARY: ...Do you think you will experience this when you are older, or not?]**

g. Become more financially secure

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>
67	Yes	83	69	49
29	No	14	26	46
5	Don't know/Refused (VOL.)	3	5	6

Q.14 And here are some problems people sometimes face when they get older. For each one, please tell me if this is something that you expect will happen to you when you are older or not? First, **[INSERT ITEM; RANDOMIZE]** – do you think this will happen to you when you are older or not? How about **[INSERT NEXT ITEM]**? **[READ ONLY IF NECESSARY: - do you think this will happen to you when you are older or not?]**

g. Having trouble paying your bills

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>
24	Yes, will happen	19	23	31
70	No, will not happen	76	71	63
4	Maybe/It may happen (VOL.)	3	4	5
2	Don't know/Refused (VOL.)	1	1	2

**ASK THOSE AGES 65 AND OLDER ONLY (Q.8= 65-97 or Q.8a=2): [N=1,332]**

Q.15 Here are some good things about getting older. For each one, please tell me if this is something that you are experiencing as you get older or not. First, [INSERT ITEM; RANDOMIZE], is this something that you are experiencing as you get older or not experiencing? How about [INSERT NEXT ITEM – READ ONLY IF NECESSARY]: is this something that you are experiencing as you get older or not?]

g. Being financially secure

All

64	Yes
31	No
5	Don't know/Refused (VOL.)

**ASK THOSE AGES 65 AND OLDER: [N=1,332]**

Q.17 And here are some problems older people sometimes face. For each one, please tell me if this is a problem for YOU or not? First, [INSERT ITEM; RANDOMIZE], is this a problem for you or not? How about [INSERT NEXT ITEM]? [READ ONLY IF NECESSARY: – is this a problem for you or not?]

g. Having trouble paying your bills

All

16	Yes, is a problem
84	No, is not a problem
1	Don't know/Refused (VOL.)

**ASK IF ONE OR BOTH PARENTS ARE LIVING AND AGE 65 OR OLDER OR IF NO PARENT LIVING/DK AND HAVE IMPORTANT STEPPARENT AGE 65 OR OLDER: [N=807]**

Q.22 I'm going to read a list of some problems older people sometimes face. For each one, please tell me whether this is a problem for (either of your parents/your mother/your father/your stepmother/your stepfather) now or not? (First, [INSERT ITEM; RANDOMIZE] [READ FOR FIRST ITEM THEN IF NECESSARY: – is this a problem for (either of your parents/your mother/your father/your stepmother/your stepfather) now or not?]

f. Having trouble paying bills

All

12	Yes, this is a problem
87	No, this is not a problem
2	Don't know/Refused (VOL.)

**ASK IF ONE OR BOTH PARENTS ARE LIVING AND AGE 65 OR OLDER OR IF NO PARENT LIVING/DK AND HAVE IMPORTANT STEPPARENT AGE 65 OR OLDER: [N=807]**

Q.52 How confident are you that your (parents/mother/father/stepmother/stepfather) will have enough income and assets to last for the rest of (their lives/her life/his life) – would you say you're very confident, somewhat confident, not too confident or not at all confident?

61	Very confident
26	Somewhat confident
7	Not too confident
4	Not at all confident
2	Don't know/Refused (VOL.)

**ASK ALL:**

Q.53 Overall, how confident are you that YOU (and your spouse) will have enough income and assets to last throughout your retirement years? Are you **[READ LIST]**?

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
30	Very confident	36	27	26	35
41	Somewhat confident	40	45	39	37
16	Not too confident	15	15	20	13
9	Not at all confident	8	10	11	6
3	Don't know/Refused <b>(VOL.)</b>	1	2	3	9

**TREND FOR COMPARISON:**

	<u>Very confident</u>	<u>Somewhat confident</u>	<u>Not so confident</u>	<u>Not confident at all</u>	<u>Retired (VOL.)</u>	<u>No opinion (VOL.)</u>
Feb 2009 <sup>1</sup>						
<i>ABC News/Washington Post</i>	14	35	25	23	3	*
Dec 2008						
<i>ABC News/Washington Post</i>	15	31	22	26	6	*
Oct 2008						
<i>ABC News/Washington Post</i>	10	34	25	24	7	1
Oct 2005						
<i>ABC News/USA today</i>	30	39	16	13	2	*
July 2002						
<i>ABC News/Washington Post</i>	18	37	21	18	5	n/a
July 2001 <i>ABC News</i>	33	35	10	12	7	2
July 1996 <i>ABC News</i>	16	29	25	21	7	1

Q.54 Do you think the nation's current economic problems will make it harder for you to take care of your financial needs in retirement, or not?

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
67	Yes	66	68	75	56
28	No	32	28	20	33
5	Don't know/Refused <b>(VOL.)</b>	2	4	5	11

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<sup>1</sup>

For all ABC News trends, the question wording was "How confident are you that you will retire with enough income and assets to last for the rest of your life – would you say you're very confident, somewhat confident, not so confident or not confident at all?"

Q.55 For each of the following, please tell me whether or not it is something that happened to you in the past year....Have you **[INSERT ITEM; RANDOMIZE]**?

a. Had trouble getting or paying for medical care for yourself or your family

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
20	Yes	27	20	21	7
80	No	72	80	79	93
*	Don't know/Refused (VOL.)	*	*	*	1

b. Had to cut back your household spending because money was tight

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
60	Yes	66	69	59	36
39	No	33	31	41	62
1	Don't know/Refused (VOL.)	1	*	*	2

c. Considered delaying your retirement **[ONLY IF NOT COMPLETELY RETIRED (E1=2-9), n=1,652]**

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
33	Yes	22	35	46	28
64	No	76	63	50	65
3	Don't know/Refused (VOL.)	2	3	4	8

#### TREND FOR Q55a, Q55b

	<u>Yes</u>	<u>No</u>	<u>DK/Ref (VOL.)</u>
a. Had trouble getting or paying for medical care for yourself or your family			
Feb 2009	20	80	*
January 2008	23	76	1
b. Had to cut back your household spending because money was tight			
Feb 2009	60	39	1
January 2008	55	45	*

Q.56 During the past 12 months, have you (IF M1=1: or your spouse) lost money in mutual funds, individual stocks, or retirement accounts, such as a 401(k), or not?

**IF YES (Q.56=1), ASK:**

Q.56a Roughly how much money have you lost – would you say you have lost less than 20% of your total investments, 20-40%, or have you lost more than 40% of your total savings and investments?

#### BASED ON TOTAL:

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
49	Yes, have lost money	29	54	66	43
15	Less than 20%	13	14	18	13
22	20%-40%	8	27	29	18
9	More than 40%	7	9	14	5
4	Don't know/Refused (VOL.)	1	3	5	7
48	No, have not lost money	69	43	33	54
1	Do not have these types of savings (VOL.)	2	1	1	2
1	Don't know/Refused (VOL.)	*	2	1	2

**ASK THOSE WHO ARE RETIRED (E1=1,2): [N=1,433]**

Q.57 Has your retirement income declined during the past 12 months because of falling interest rates or declines in the stock market or not?

<u>All</u>		<u>50-64</u>	<u>65+</u>
26	Yes	26	26
71	No	73	71
3	Don't know/Refused (VOL.)	1	3

**ASK ONLY THOSE AGE 65 OR OLDER WITH CHILDREN: [N=1,149]**

Q.58 Do you plan to leave any money or property to your children or other family members when you die, or not?

**IF YES (Q.58=1), ASK:**

Q.59 Do you think the money or property you leave your children or other family members will be worth less than \$10,000 or more than \$10,000?

<u>All</u>	
77	Yes, plan to leave money/property
7	Less than \$10,000
61	More than \$10,000
9	Don't know/Refused (VOL.)
14	No, do not plan to leave money/property
9	Don't know/Refused (VOL.)

**ASK ALL AGE 65 OR OLDER WITH CHILDREN: [N=1,149]**

Q.60 Do you think the recent downturn in the economy will have an impact on how much money or property you will leave for your children or other family members, or not?

<u>All</u>	
56	Yes
30	No
14	Don't know/Refused (VOL.)

**ASK IF ONE OR BOTH PARENTS ARE LIVING AND AGE 65 OR OLDER OR IF NO PARENT LIVING/DK AND HAVE IMPORTANT STEPPARENT AGE 65 OR OLDER: [N=807]**

Q.61 Do you expect your (parents/mother/father/stepmother/stepfather) to leave you any money or property when (they die/she dies/he dies), or not?

**IF YES (Q.61=1), ASK:**

Q.62 Do you think the money or property you inherit will be worth less than \$10,000 or more than \$10,000?

43	Yes, expect to inherit money/property
6	Less than \$10,000
36	More than \$10,000
2	Don't know/Refused (VOL.)
48	No, do not expect to inherit money/property
9	Don't know/Refused (VOL.)

**OLDER ADULTS AND THE ECONOMY: SURVEY II**  
**PEW SOCIAL & DEMOGRAPHIC TRENDS TOPLINE**  
 April 2-8, 2009, TOTAL N=1,003

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Q.23 I am going to read you a list of things that some people have done because of the economic recession but other people have not done. For each of the following, please tell me if you personally have done this, or not. Have you **(INSERT ITEM, RANDOMIZE)** because of the recession, or not? **(READ AS NECESSARY)** Have you **(INSERT ITEM, RANDOMIZE)** because of the recession or not?

a. Held a garage sale or sold items on the internet

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
16	Yes	15	19	17	7
82	No	84	79	81	90
2	Yes, but not because of recession(VOL)	1	2	2	2
*	Not applicable(VOL)	0	0	0	0
*	Don't know/Refused (VOL.)	*	0	0	0

b. Made plans to plant a vegetable garden

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
21	Yes	19	23	24	11
69	No	75	65	65	73
9	Yes, but not because of recession(VOL)	5	10	9	13
1	Not applicable(VOL)	1	1	1	3
1	Don't know/Refused (VOL.)	1	*	1	*

c. Had a friend or relative move in with you or you moved in with a friend or relative

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
10	Yes	18	10	6	5
89	No	82	89	92	93
1	Yes, but not because of recession(VOL)	0	*	2	2
*	Not applicable(VOL)	0	0	0	1
*	Don't know/Refused (VOL.)	0	0	0	0

d. Rented out a room or space in your home to a boarder who was not a friend or relative

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
2	Yes	2	2	1	1
98	No	98	98	99	97
*	Yes, but not because of recession(VOL)	0	0	*	*
*	Not applicable(VOL)	1	*	0	1
*	Don't know/Refused (VOL.)	0	0	0	1

## Q.23 CONTINUED...

e. Started doing yard work or home repairs that you used to pay others to do

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
20	Yes	24	22	24	7
68	No	67	66	66	79
5	Yes, but not because of recession(VOL)	2	6	6	6
6	Not applicable(VOL)	6	6	4	7
1	Don't know/Refused (VOL.)	1	1	*	*

f. Started doing yard work or home repairs that you used to pay others to do

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
24	Yes	30	28	21	9
70	No	63	65	73	85
1	Yes, but not because of recession(VOL)	0	1	1	2
5	Not applicable(VOL)	7	6	4	4
*	Don't know/Refused (VOL.)	*	*	1	1

g. Started doing yard work or home repairs that you used to pay others to do

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
22	Yes	30	23	22	10
72	No	66	73	72	78
1	Yes, but not because of recession(VOL)	2	1	0	1
4	Not applicable(VOL)	1	3	6	9
1	Don't know/Refused (VOL.)	1	0	1	1

Q. 24 For each of the following, please tell me whether or not it is something that happened to you or someone in your household in the past year....Have you or has someone in your household [RANDOMIZE]?

a. Had problems paying rent or mortgage

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
21	Yes	32	21	18	8
79	No	68	79	82	92
*	Don't know/Refused (VOL.)	0	*	0	0

b. Been laid off or lost a job

<u>All</u>		<u>18-29</u>	<u>30-49</u>	<u>50-64</u>	<u>65+</u>
27	Yes	36	29	24	14
73	No	64	71	76	86
*	Don't know/Refused (VOL.)	0	0	0	0