

**Survey of Older Workers, 2008  
Questionnaire**

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FOR INFORMATION ONLY

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**Section: Cover Screen (CS)**

**CS\_BEG** Beginning of section

**CS\_R01** **To ensure we ask you the appropriate questions, I would like to take a minute to confirm your current work situation.**

**CS\_Q01** **Which of the following best describes your current situation?**

INTERVIEWER: Read categories to respondent.

- 1 I'm working, (part-time or full-time), and I've never retired
  - 2 I'm working, (part-time or full-time), and I've previously retired
  - 3 I'm not working and not looking for work .....(Go to CS\_Q03)
  - 4 I'm not working but I'm looking for work .....(Go to CS\_Q03)
  - 5 I'm not working and unable to work .....(Go to CS\_Q03)
- DK, RF

Default: (Go to CS\_Q02)

Coverage: *All respondents*

**CS\_Q02** **Are you currently a paid employee or self-employed?**

- 1 Paid employee
  - 2 Self-employed
- DK, RF

Coverage: *Respondents who are currently working*

**CS\_C03** If CS\_Q01 = 1 or 2 .....(Go to CS\_Q04)  
If CS\_Q01 = DK, RF .....(Go to CS\_Q03)

**CS\_Q03** **Are you currently retired?**

- 1 Yes
  - 2 No
- DK, RF

Coverage: *Respondents who are not currently working*

**CS\_Q04** **Since the age of 50, have you lost a job following a layoff, plant or business closure, or downsizing?**

- 1 Yes
  - 2 No
- DK, RF

Coverage: *All respondents*

**CS\_END** End of section.

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**Section: Current Employment (CE)**

**CE\_BEG** Beginning of section

**CE\_C01** If respondent is currently working (CS\_Q01= 1, 2) .....(Go to CE\_Q01)  
Otherwise.....(Go to CE\_END)

**CE\_Q01 Thinking about your current job, would you say you are...?**

INTERVIEWER: Read categories to respondent.

- 1 Very satisfied
  - 2 Satisfied
  - 3 Dissatisfied
  - 4 Very dissatisfied
- DK, RF

*Coverage: Respondents who are currently working*

**CE\_Q02 In your current job, would you say that most days at work are...?**

INTERVIEWER: Read categories to respondent.

- 1 Not at all stressful
  - 2 Not very stressful
  - 3 Quite a bit stressful
  - 4 Extremely stressful
- DK, RF

*Coverage: Respondents who are currently working*

**CE\_Q03 Do you have an age in mind at which you plan to retire from your current job?**

- 1 Yes.....(Go to CE\_Q04)
  - 2 No
- DK, RF

*Default: (Go to CE\_Q06)*

*Coverage: Respondents who are currently working*

**CE\_Q04 At what age do you plan to retire from your current job?**

INTERVIEWER: If 'Never' enter 131.

- 131 \_\_\_\_\_(3 spaces) [Min: 50 Max: 131]
- Never  
DK, RF

*Coverage: Respondents who are currently working and are planning to retire from their current job*

**CE\_C05** If CE\_Q04 = 131 (Never).....(Go to CE\_END)  
Otherwise.....(Go to CE\_Q05)

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**CE\_Q05**      **At that time, do you plan to...?**

INTERVIEWER: Read categories to respondent.

1            Retire completely .....(Go to CE\_END)  
2            Remain in the workforce full-time  
3            Remain in the workforce part-time  
              DK, RF

*Coverage:*            Respondents who are currently working and are planning to retire from their current job and know at what age they will do so

**CE\_Q06**      **Do you have an age in mind at which you plan to completely leave the paid workforce?**

1            Yes.....(Go to CE\_Q07)  
2            No  
              DK, RF

Default:            (Go to CE\_END)

*Coverage:*            Respondents who are currently working, and either do not know when they will retire or will not completely leave the workforce when they do retire

**CE\_Q07**      **At what age do you plan to completely leave the paid workforce?**

INTERVIEWER: If 'Never' enter 131

                  \_\_\_\_(3 spaces)            [Min: 50 Max: 131]

131            Never  
              DK, RF

*Coverage:*            Respondents who are currently working, and either do not know when they will retire or will not completely leave the workforce when they do retire, but know when they will completely leave the workforce

**CE\_END**            End of section.

**Section:**            **Current Unemployment (CU)**

**CU\_BEG**            Beginning of section

**CU\_C01**            If respondent is unemployed and looking for work (CS\_Q01 = 4) (Go to CU\_Q01)  
                  If respondent is unemployed and unable to work (CS\_Q01 = 5) .. (Go to CU\_Q04)  
                  Otherwise.....(Go to CU\_END)

**CU\_Q01**            **Would you be willing to learn new skills to find employment?**

1            Yes  
2            No  
              DK, RF

*Coverage:*            Respondents who are unemployed and looking for work

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**CU\_Q02**      **Would you be willing to move in order to accept a job?**

1              Yes  
2              No ..... (Go to CU\_Q03)  
                 DK, RF

Default:      (Go to CU\_Q06)

Coverage:     *Respondents who are unemployed and looking for work*

**CU\_Q03**      **Why are you unable to relocate? Is it because of...**

INTERVIEWER: Read categories to respondent. Mark all that apply.

1              Community attachment or friends  
2              Family ties or obligations  
3              The costs associated with housing or moving  
4              Any other reason - Specify ..... (Go to CU\_S03)  
                 DK, RF

Default:      (Go to CU\_Q06)

Coverage:     *Respondents who are unemployed, looking for work and unable to relocate*

**CU\_S03**      Why are you unable to relocate?

INTERVIEWER: Specify.

\_\_\_\_\_ (80 spaces)

**CU\_Q04**      **Why are you no longer able to work? Is it because of...**

INTERVIEWER: Read categories to respondent. Mark all that apply.

1              Long term physical or mental disability  
2              Care giving needs of a spouse or a child  
3              Care giving needs of a parent  
4              Any other reason - Specify ..... (Go to CU\_S04)  
                 DK, RF

Default:      (Go to CU\_Q05)

Coverage:     *Respondents not working and unable to work*

**CU\_S04**      Why are you no longer able to work?

INTERVIEWER: Specify.

\_\_\_\_\_ (80 spaces)

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**CU\_Q05**      **Can you think of anything that might allow or entice you to return to the paid workforce? Such as...**

INTERVIEWER: Read categories to respondent. Mark all that apply.

- 1            Improved health
- 2            Care giving is no longer required
- 3            Job available that I could do
- 4            Any other reason - Specify ..... (Go to CU\_S05)
- 5            No  
              DK, RF

Default:        (Go to CU\_Q06)

Coverage:      *Respondents not working and unable to work*

**CU\_S05**      **Can you think of anything that might allow or entice you to return to the paid workforce?**

INTERVIEWER: Specify.

\_\_\_\_ (80 spaces)

**CU\_Q06**      **Because of the time you were without work, do you think you will permanently leave the workforce...**

INTERVIEWER: Read categories to respondent.

- 1            Sooner than planned
- 2            Later than planned
- 3            As planned  
              DK, RF

Coverage:      *Respondents who are not working, looking for work or unable to work*

**CU\_Q07**      **Do you have an age in mind at which you plan to completely leave the paid workforce?**

- 1            Yes..... (Go to CU\_Q08)
- 2            No  
              DK, RF

Default:        (Go to CU\_END)

Coverage:      *Respondents who are not working, looking for work or unable to work*

**CU\_Q08**      **At what age do you plan to completely leave the paid workforce?**

INTERVIEWER: If 'Never' enter 131.

- \_\_\_\_ (3 spaces)            [Min: 50 Max: 131]
- 131        Never  
              DK, RF

Coverage:      *Respondents who are not currently employed, and who are either looking for work or unable to work, and know when they will completely leave the workforce*

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**CU\_END** End of section.

**Section: Reasons for Retirement (RR)**

**RR\_C01** If (CS\_Q01 = 5, DK, RF) .....(Go to RR\_END)  
If CS\_Q01 = 1 (working) and CS\_Q02 = 2 (self-employed)  
and Age = 60 .....(Go to RR\_END)  
If CS\_Q01 = 2 .....(Go to RR\_R01)  
If CS\_Q01 = 3 and CS\_Q03 = 1 .....(Go to RR\_R01)  
Otherwise ..... (Go to RR\_C03A)

**RR\_R01** **Now, I would like to ask you some questions about retirement planning and the factors that affected the timing of your retirement.**

**RR\_Q01A** **Please indicate which of the following factors affected the timing of your retirement from your first job:**

**Layoff, plant or business closure or downsizing**

1 Yes .....(Go to RR\_C05)  
2 No  
DK, RF

Default: (Go to RR\_Q01B)

Coverage: *Respondents who are currently working, but have previously retired or are currently retired*

**RR\_Q01B** **Please indicate which of the following factors affected the timing of your retirement from your first job:**

**Personal health or disability issues**

1 Yes  
2 No  
DK, RF

Coverage: *Respondents who are currently working, but have previously retired or are currently retired*

**RR\_Q01C** **Please indicate which of the following factors affected the timing of your retirement from your first job:**

**Health or disability issues of partner or spouse**

1 Yes  
2 No  
DK, RF

Coverage: *Respondents who are currently working, but have previously retired or are currently retired*

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**RR\_Q01D** Please indicate which of the following factors affected the timing of your retirement from your first job:

**Financial readiness**

- 1 Yes
- 2 No  
DK, RF

Coverage: Respondents who are currently working, but have previously retired or are currently retired

**RR\_Q01E** Please indicate which of the following factors affected the timing of your retirement from your first job:

**Lack of job satisfaction**

- 1 Yes
- 2 No  
DK, RF

Coverage: Respondents who are currently working, but have previously retired or are currently retired

**RR\_Q01F** Is there any other factor that affected the timing of your retirement from your first job?

- 1 Yes.....(Go to RR\_S01F)
- 2 No  
DK, RF

Default: (Go to RR\_C02)

Coverage: Respondents who are currently working, but have previously retired or are currently retired

**RR\_S01F** Is there any other factor that affected the timing of your retirement from your first job?

**INTERVIEWER:** Record only one factor. If multiple factors are mentioned, probe for most important.

\_\_\_\_(80 spaces)

Coverage: Respondents working and previously retired or not working and retired who admitted to another factor influencing decision to retire (RR\_Q01F = 1)

**RR\_C02** If more than one 'yes' to questions RR\_Q01B through RR\_Q01F (Go to RR\_Q02)  
Otherwise..... (Go to RR\_C03A)



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**RR\_Q02**      **Of those factors that affected the timing of your retirement, which one was the most important?**

- 1            Personal health or disability issues
  - 2            Health or disability issues of partner or spouse
  - 3            Financial readiness
  - 4            Lack of job satisfaction
  - 5            Other
- DK, RF

*Coverage:*            Respondents working and previously retired or not working and retired who indicated more than one factor leading to their retirement

**RR\_C03A**      If CS\_Q01 = 1 or 4.....(Go to RR\_R03)  
If CS\_Q01 = 3 and CS\_Q03 <> 1 (Not working, not looking, not retired).....(Go to RR\_R03)  
Otherwise..... (Go to RR\_C03B)

**RR\_R03**      **Now, I would like to ask you some questions about retirement planning and the factors that may affect the timing of your retirement.**

**RR\_C03B**      If respondent is self-employed (CS\_Q02 =2).....(Go to RR\_C05)  
Otherwise..... (Go to RR\_Q03A)

**RR\_Q03A**      **Does your employer offer the following arrangements?**

**Part-time work**

INTERVIEWER: If the respondent is retired or was previously retired, this question refers to the main employer that they retired from. If unemployed, the question refers to the previous employer.

- 1            Yes
  - 2            No
  - 3            Not applicable, self-employed .....(Go to RR\_C05)
- DK, RF

**Default:**            (Go to RR\_Q03B)

*Coverage:*            Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job

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**RR\_Q03B Does your employer offer the following arrangements?**

**Working from home**

- 1 Yes
- 2 No  
DK, RF

*Coverage: Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

**RR\_Q03C Does your employer offer the following arrangements?**

**Flexible work hours**

- 1 Yes
- 2 No  
DK, RF

*Coverage: Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

**RR\_Q03D Does your employer offer the following arrangements?**

**The ability to begin to collect your employer pension while still working**

- 1 Yes
- 2 No  
DK, RF

*Coverage: Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

**RR\_Q04A Would the availability of part-time work lead you to work longer than you originally planned?**

INTERVIEWER: If the respondent is retired or was previously retired, this question refers to the main employer that they retired from. If unemployed, the question refers to the previous employer.

- 1 Yes
- 2 No  
DK, RF

*Coverage: Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

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**RR\_Q04B**      **Would the availability of working from home lead you to work longer than you originally planned?**

INTERVIEWER: If the respondent is retired or was previously retired, this question refers to the main employer that they retired from. If unemployed, the question refers to the previous employer.

- 1            Yes
- 2            No
- DK, RF

*Coverage:            Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

**RR\_Q04C**      **Would the availability of flexible work hours lead you to work longer than you originally planned?**

INTERVIEWER: If the respondent is retired or was previously retired, this question refers to the main employer that they retired from. If unemployed, the question refers to the previous employer.

- 1            Yes
- 2            No
- DK, RF

*Coverage:            Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

**RR\_Q04D**      **Would the ability to begin to collect your employer pension while still working lead you to work longer than you originally planned?**

INTERVIEWER: If the respondent is retired or was previously retired, this question refers to the main employer that they retired from. If unemployed, the question refers to the previous employer.

- 1            Yes
- 2            No
- DK, RF

*Coverage:            Currently working as employees, or currently working previously retired where layoff or business closure was not a factor in retirement, or not working and not retired, or not working and looking for work, or currently retired where layoff or business closure was not a factor in retirement; AND they were not self-employed in their previous job*

**RR\_C05**      If CS\_Q01 = 1 or 2 and Age < 60 ..... (Go to RR\_Q05)  
Otherwise.....(Go to RR\_C07)

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**RR\_Q05**      **If you could start receiving your Canada Pension Plan/Quebec Pension Plan retirement pension as early as age 60, without having to interrupt or reduce your work earnings, would you consider doing so?**

- 1            Yes..... (Go to RR\_Q06)
- 2            No  
              DK, RF

Default:        (Go to RR\_C07)

Coverage:      *Respondents who are currently working and aged less than 60*

**RR\_Q06**      **Do you think that this would influence you to retire earlier or later than originally planned?**

- 1            Earlier
- 2            Later
- 3            Neither  
              DK, RF

Coverage:      *Respondents who are currently working and aged less than 60 and that would consider receiving their CPP retirement pension as early as 60*

**RR\_C07**      If respondent is retired (CS\_Q01=3 and CS\_Q03 = 1) ..... (Go to RR\_Q07)  
Else if respondent is working, previously retired (CS\_Q01 = 2) ..... (Go to RR\_Q09)  
Otherwise.....(Go to RR\_END)

**RR\_Q07**      **You mentioned earlier that you were currently retired and not looking for work. Did you ever retire and return to the workforce?**

- 1            Yes..... (Go to RR\_Q09)
- 2            No  
              DK, RF

Coverage:      *Respondents who are currently retired*

**RR\_Q08**      **Did you look for paid work at any time after your retirement?**

- 1            Yes
- 2            No  
              DK, RF

Default:        (Go to RR\_Q10)

Coverage:      *Respondents who are currently retired and never returned to the workforce*

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**RR\_Q09**      **What contributed to your decision to go back to work after you retired?**

INTERVIEWER: If needed, read categories to respondent. Mark all that apply.

1            Financial need  
2            Family related reasons  
3            Always planned to return to work doing something different  
4            Social interaction / Something to do  
5            Other - Specify.....(Go to RR\_S09)  
              DK, RF

Default:        (Go to RR\_Q10)

Coverage:      *Respondents that retired and returned to the workforce*

**RR\_S09**      **What contributed to your decision to go back to work after you retired?**

INTERVIEWER: Specify.

\_\_\_\_(80 spaces)

**RR\_Q10**      **How old were you when you first retired?**

\_\_\_\_(3 spaces)      [Min: 30 Max: 130]

DK, RF

Coverage:      *Respondents who are currently retired and respondents that previously retired and returned to work*

**RR\_Q11**      **Would you say that your first retirement was voluntary, that is, you retired when you wanted to?**

- 1            Yes  
2            No  
              DK, RF

Coverage:      *Respondents who are currently retired and respondents that previously retired and returned to work*

**RR\_END**      End of section

**Section:**      **Pension Plans, Benefits and Retirement Planning (PP)**

**PP\_R01**      **I would now like to ask a few questions about your pension plans, your benefits and your general financial planning for retirement.**

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**PP\_Q01**      **From the following list, which sources of income do you plan to receive or use in your retirement?**

INTERVIEWER: Read categories to respondent. Mark all that apply.

- 01      Canada Pension Plan/Quebec Pension Plan
- 02      Old Age Security (OAS)
- 03      Guaranteed Income Supplement (GIS)
- 04      Workplace pension
- 05      RRSPs
- 06      Other private savings and investments
- 07      Borrowing against the value of your home or reverse mortgage
- 08      Income from work (part-time work, freelance work or self-employment)
- 09      Other - Specify..... (Go to PP\_S01)
- 10      None of these  
DK, RF

Default:      (Go to PP\_C02)

Coverage:      *All respondents*

**PP\_S01**      **From the following list, which sources of income do you plan to use in retirement?**

INTERVIEWER: Specify.

\_\_\_\_(80 spaces)

**PP\_C02**      If more than one item selected in PP\_Q01..... (Go to PP\_Q02)  
Otherwise..... (Go to PP\_C03)

**PP\_Q02**      **Which of these income sources is your main source of retirement income?**

- 01      Canada Pension Plan/Quebec Pension Plan
- 02      Old Age Security (OAS)
- 03      Guaranteed Income Supplement (GIS)
- 04      Workplace pension
- 05      RRSPs
- 06      Other private savings and investments
- 07      Borrowing against the value of your home or reverse mortgage
- 08      Income from work (part-time work, freelance work or self-employment)
- 09      Other  
DK, RF

Coverage:      *Respondents with at least one (planned) source of retirement income*

**PP\_C03**      If CS\_Q01 = 3 and CS\_Q03 = 1 (retired)..... (Go to PP\_C04)  
Otherwise..... (Go to PP\_Q03A)

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**PP\_Q03A**      **What is your best estimate of the total yearly personal income that you think you will receive in retirement from all sources, before taxes and deductions?**

INTERVIEWER: Income can come from various sources such as from work, investments, pensions or government. Examples include Employment Insurance, Social Assistance, Child Tax Benefit and other income such as child support, alimony and rental income.  
Note that capital gains should not be included in the personal income.

Read categories to respondent.

- 1      Less than \$25,000 ..... (Go to PP\_Q03B)
- 2      \$25,000 or more ..... (Go to PP\_Q03C)
- DK, RF ..... (Go to PP\_C04)

Coverage:      *Respondents who are not currently retired*

**PP\_Q03B**      **Is that less than \$15,000?**

- 1      Yes
- 2      No
- DK, RF

Default:      (Go to PP\_C04)

Coverage:      *Respondents who are not retired with an expected retirement income of less than \$25,000*

**PP\_Q03C**      **Is that more than \$50,000?**

- 1      Yes
- 2      No
- DK, RF

Coverage:      *Respondents who are not retired with an expected retirement income of greater than or equal to \$25,000*

**PP\_C04**      If Age > 59 and (CS\_Q01 = 3 and CS\_Q03=1) and (PP\_D02B = 01) ..... (Go to PP\_Q08)  
If Age < 60 ..... (Go to PP\_Q05)  
Otherwise..... (Go to PP\_Q04)

**PP\_Q04**      **Are you currently collecting a retirement pension from Canada PensionPlan/Quebec Pension Plan?**

- 1      Yes.....(Go to PP\_Q08)
- 2      No
- DK, RF

Default:      (Go to PP\_Q05)

Coverage:      *Age greater than or equal to 60 not currently retired, OR age greater than or equal to 60 currently retired but CPP retirement pension is not their main source of income*

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**PP\_Q05**      **At what age do you plan to apply for your Canada Pension Plan/Quebec Pension Plan benefits?**

\_\_\_\_(3 spaces)      [Min: 60 Max: 121]  
DK, RF

*Coverage: Respondents aged less than 60, OR age greater than or equal to 60 not currently retired, OR age greater than or equal to 60 currently retired but CPP retirement pension is not their main source of income or not currently collecting a CPP retirement pension*

**PP\_Q06**      **Which of the two following statements best describes your understanding of the Canada Pension Plan/Quebec Pension Plan rules?**

INTERVIEWER: Read categories to respondent.

- 1      I have to permanently retire from the workforce once I start receiving my Canada Pension Plan/Quebec Pension Plan benefits
  - 2      I do not have to permanently retire from the workforce once I start receiving my Canada Pension Plan/Quebec Pension Plan benefits
- DK, RF

*Coverage: Respondents aged less than 60, OR age greater than or equal to 60 not currently retired, OR age greater than or equal to 60 currently retired but CPP retirement pension is not their main source of income and not currently collecting a CPP retirement pension*

**PP\_Q07**      **What proportion of your retirement income do you foresee coming from public pensions such as the Canada Pension Plan/Quebec Pension Plan, Old Age Security and the Guaranteed Income Supplement?**

INTERVIEWER: Read categories to respondent.

- 1      Less than 25%
  - 2      25% to 49%
  - 3      50% to 74%
  - 4      75% or more
- DK, RF

**Default:** (Go to PP\_C09)

*Coverage: Respondents aged less than 60, OR Age greater than or equal to 60 not currently retired, OR age greater than or equal to 60 currently retired but CPP retirement pension is not their main source of income and not currently collecting a CPP retirement pension*

**PP\_Q08**      **At what age did you start receiving these benefits?**

\_\_\_\_(3 spaces)      [Min: 60 Max: 130]  
DK, RF

*Coverage: Respondents aged 60 and over currently receiving a CPP retirement pension*

**PP\_C09**      If (CS\_Q01 = 3, 4, 5, DK, RF) .....(Go to PP\_Q11)  
If (CS\_Q01 = 1, 2) and (CS\_Q02 = 2).....(Go to PP\_Q11)  
If (CS\_Q01 = 1, 2) and (PP\_Q01<> 4) and (CS\_Q02 = 1) .....(Go to PP\_Q09)  
Otherwise.....(Go to PP\_C10)



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**PP\_Q09**      **Does your current employer provide you with a workplace pension plan?**

INTERVIEWER: Do not include CPP or QPP.

- 1      Yes
- 2      No  
      DK, RF

*Coverage:*      Respondents currently working as employees and have not indicated a workplace pension in their retirement plans

**PP\_C10**      If (CS\_Q01 = 1, 2) and (PP\_Q01 = 4) and (CS\_Q02 = 1) .....(Go to PP\_Q10)  
If PP\_Q09 =1 .....(Go to PP\_Q10)  
Otherwise.....(Go to PP\_Q11)

**PP\_Q10**      **How many years of pensionable service do you have with your current employer?**

\_\_\_\_(2 spaces)      [Min: 0 Max: 60]  
DK, RF

*Default:*      (Go to PP\_Q12)

*Coverage:*      Respondents currently working as employees and have indicated that they have a workplace pension

**PP\_Q11**      **Did you ever contribute to a workplace pension plan?**

INTERVIEWER: If respondents ask, they should exclude CPP/ QPP.

- 1      Yes.....(Go to PP\_Q12)
- 2      No  
      DK, RF

*Default:*      (Go to PP\_Q13)

*Coverage:*      Respondents not currently working (including DK and RF), OR currently working as self-employed, OR currently working as employees with no workplace pension

**PP\_Q12**      **How many years of pensionable service do you have with your past employers?**

\_\_\_\_(2 spaces)      [Min: 0 Max: 60]  
DK, RF

*Coverage:*      Respondents who have once belonged or currently belong to a workplace pension

**PP\_Q13**      **Do you currently have RRSPs?**

- 1      Yes
- 2      No  
      DK, RF

*Coverage:*      All respondents

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**PP\_Q14**      **Where do you get most of your financial advice for retirement?**

- 01      Spouse or partner
- 02      Family or friends
- 03      Personal research such as books, magazines, internet sites
- 04      Professional financial advisor
- 05      Government
- 06      Do not receive advice
- 07      Other  
DK, RF

*Coverage:*      *All respondents*

**PP\_END**      End of section

**Section:**      **Health (HL)**

**HL\_BEG**      Beginning of module

**HL\_R01**      **The following one or two questions deal with your health.**

**HL\_Q01**      **In general, would you say your overall health is...?**

INTERVIEWER: Read categories to respondent.

- 1      Very good
- 2      Good
- 3      Fair
- 4      Poor
- 5      Very poor  
DK, RF

*Coverage:*      *All respondents*

**HL\_C02**      If (CS\_Q01 = 3, 4, 5, DK, RF) ..... (Go to HL\_Q02)  
Otherwise..... (Go to HL\_END)

**HL\_Q02**      **Assuming you were willing to return to work, does your current physical or mental health allow you to return to your previous type of work?**

- 1      Yes
- 2      No  
DK, RF

*Coverage:*      *Respondents who are currently not working*

**HL\_END**      End of section

**Section:**      **Finance (FI)**

**FI\_BEG**      Beginning of section

**FI\_R01**      **I would now like to ask you some questions on basic financial issues such as sources of income and certain retirement assets.**

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**FI\_Q01**      **Thinking about your total personal income, did you receive any income in the past 12 months from...?**

INTERVIEWER: Read categories to respondent. Mark all that apply

- 01      Wages or salaries
- 02      Income from self-employment
- 03      Dividends and interest (ex: bonds, savings)
- 04      Employment insurance
- 05      Workers compensation
- 06      Canada Pension Plan/Quebec Pension Plan
- 07      Workplace pensions
- 08      RRSP/RRIF
- 09      Old Age Security
- 10      Guaranteed Income Supplement
- 11      Other - Specify.....(Go to FI\_S01)
- 12      None  
DK, RF

Default:      (Go to FI\_Q02A)

Coverage:      *All respondents*

**FI\_S01**      Thinking about your total personal income, did you receive any income in the past 12 months from ...?

INTERVIEWER: Specify.

\_\_\_\_(80 spaces)

DK

**FI\_Q02A**      **What is your best estimate of your personal income, before taxes and deductions from all sources, including those just mentioned, during the year ending December 31, 2007. Was it...?**

INTERVIEWER: Read categories to respondent.

- 1      Less than \$50,000 .....(Go to FI\_Q02B)
- 2      \$50,000 or more .....(Go to FI\_Q02C)
- DK, RF .....(Go to FI\_C03)

Coverage:      *All respondents*

**FI\_Q02B**      **Is that less than \$25,000?**

- 1      Yes
- 2      No  
DK, RF

Default:      (Go to FI\_C03)

Coverage:      *Respondents with an annual personal income less than \$50,000*

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**FI\_Q02C**      **Is that more than \$75,000?**

- 1            Yes
- 2            No  
              DK, RF

Coverage:      *Respondents with an annual personal income of \$50,000 or more*

**FI\_C03**      If SourcesOfIncome = 1 or 2 .....(Go to FI\_C04)  
                  Otherwise.....(Go to FI\_Q03)

**FI\_Q03**      **During the year ending December 31, 2007, did 50% or more of your  
personal income come from retirement sources?**

INTERVIEWER: If necessary, please add: Retirement sources include:  
Canada Pension Plan (CPP) or Québec Pension Plan (QPP), workplace  
pensions, superannuation, annuities, Registered Retirement Savings Plan  
(RRSP) or Registered Retirement Income Funds (RRIF), Old Age Security  
(OAS), Guaranteed Income Supplement (GIS) or Veteran's pension.

- 1            Yes
- 2            No  
              DK, RF

Coverage:      *All respondents*

**FI\_C04**      If HHSize > 1 .....(Go to FI\_R04)  
                  Otherwise.....(Go to FI\_C05)

**FI\_R04**      **The next questions are about your household finances.**

**FI\_Q04A**      **What is your best estimate of your household income, before taxes and  
deductions from all sources, during the year ending December 31, 2007.  
Was it...?**

INTERVIEWER: Read categories to respondent.

- 1            Less than \$50,000 .....(Go to FI\_Q04B)
- 2            \$50,000 or more .....(Go to FI\_Q04C)
- DK, RF .....(Go to FI\_C05)

Coverage:      *Repondents where the household size is greater than one*

**FI\_Q04B**      **Is that less than \$25,000?**

- 1            Yes
- 2            No  
              DK, RF

Default:        (Go to FI\_C05)

Coverage:      *Respondents with a household income less than \$50,000*

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**FI\_Q04C**      **Is that more than \$100,000?**

- 1            Yes
- 2            No  
              DK, RF

*Coverage:*            *Respondents with a household income of \$50,000 or more*

**FI\_C05**            If (CS\_Q01 = 3 and CS\_Q03 = 1) .....(Go to FI\_R06)  
                          Otherwise.....(Go to FI\_Q05)

**FI\_Q05**            **How confident are you that your household income in retirement will give you the standard of living you hope for?**

INTERVIEWER: Read categories to respondent.

- 1            Very confident
- 2            Somewhat confident
- 3            Not very confident
- 4            Not at all confident  
              DK, RF

*Coverage:*            *Respondents who are not currently retired*

**FI\_R06**            **Now I would like to ask you a few questions about your financial obligations towards your family.**

**FI\_Q06**            **Are you or will you be financially supporting a child's higher education?**

- 1            Yes
- 2            No  
              DK, RF

*Coverage:*            *All respondents*

**FI\_Q07**            **Are you financially supporting the care of a family member?**

- 1            Yes
- 2            No  
              DK, RF

*Coverage:*            *All respondents*

**FI\_C08**            If (FI\_Q06 = 1 or FI\_Q07 =1).....(Go to FI\_Q08)  
                          Otherwise.....(Go to FI\_END)

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**FI\_Q08**      **For how long do you expect this financial support to last?**

INTERVIEWER: Read categories to respondent.

- 1      Less than one year
- 2      1 to 3 years
- 3      More than three years
- DK, RF

*Coverage:*      *Respondents financially supporting another family member*

**FI\_END**      End of section

**Section:**      **Displaced Workers (DW)**

**DW\_BEG**      Beginning of section

**DW\_C01**      If respondent has been displaced (CS\_Q04=1) .....(Go to DW\_Q01)  
                  Otherwise.....(Go to DW\_END)

**DW\_Q01**      **You mentioned earlier that you had lost a job since the age of 50. Was that due to...?**

INTERVIEWER: Read categories to respondent. INTERVIEWER: If respondent mentions more than one job loss, please refer to latest experience.

- 1      A layoff
- 2      A plant or business closure
- 3      Downsizing
- 4      Other .....(Go to DW\_S01)
- DK, RF

*Default:*      (Go to DW\_Q02)

*Coverage:*      *Respondents who have lost a job since the age of 50*

**DW\_S01**      You mentioned earlier that you had lost a job since the age of 50. Was that due to...?

INTERVIEWER: Specify.

\_\_\_\_(80 spaces)

**DW\_Q02**      **Thinking about your most recent job loss, how old were you when it happened?**

\_\_\_\_(2 spaces)      [Min: 50 Max: 75]  
DK, RF

*Coverage:*      *Respondents who have lost a job since the age of 50*

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**DW\_Q03      Are you still without work?**

1            Yes.....(Go to DW\_Q05)  
2            No  
              DK, RF

Default:        (Go to DW\_Q04)

Coverage:      *Respondents who have lost a job since the age of 50*

**DW\_Q04      How long were you without work following the job loss?**

INTERVIEWER: Indicate number of months.

\_\_\_\_(3 spaces)        [Min: 0 Max: 300]  
DK, RF

Default:        (Go to DW\_Q11)

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work*

**DW\_Q05      How long have you been without work?**

INTERVIEWER: Indicate number of months.

\_\_\_\_(3 spaces)        [Min: 0 Max: 300]  
DK, RF

Coverage:      *Respondents who have lost a job since the age of 50 and are not back at work*

**DW\_C06**      If DW\_Q01 = 2, 3, 4, DK or RF.....(Go to DW\_Q07)  
                  Otherwise.....(Go to DW\_Q06)

**DW\_Q06      Do you expect to be recalled?**

INTERVIEWER: Read categories to respondent.

1            Yes, I expect to be recalled  
2            No, I'm unlikely to be recalled  
3            No, it's a permanent layoff  
              DK, RF

Coverage:      *Respondents who have lost a job since the age of 50 because of a layoff and are not back at work*

**DW\_Q07      Are you looking for other work?**

1            Yes.....(Go to DW\_Q08)  
2            No  
              DK, RF

Default:        (Go to DW\_END)

Coverage:      *Respondents who have lost a job since the age of 50 and are not back at work*

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**DW\_Q08      Are you looking for work in your current field?**

- 1            Yes
- 2            No  
              DK, RF

Coverage:        *Respondents who have lost a job since the age of 50 and are not back at work and are currently looking for work*

**DW\_Q09      Would you be willing to retrain to learn new skills or update old ones?**

- 1            Yes
- 2            No .....(Go to DW\_Q10)  
              DK, RF

Default:        (Go to DW\_END)

Coverage:        *Respondents who have lost a job since the age of 50 and are not back at work and are currently looking for work*

**DW\_Q10      Why are you unable to retrain?**

INTERVIEWER: Read categories to respondent. Mark all that apply.

- 1            Cost
- 2            Too old to learn new skills
- 3            Not interested
- 4            No work nearby
- 5            Travel, commute
- 6            Other - Specify.....(Go to DW\_S10)  
              DK, RF

Default:        (Go to DW\_END)

Coverage:        *Respondents who have lost a job since the age of 50 and not back at work and currently looking for work and unwilling to retrain*

**DW\_S10      Why are you unable to retrain?**

INTERVIEWER: Specify.

\_\_\_\_(80 spaces)

Default:        (Go to DW\_END)

**DW\_Q11      Following the job loss, did you look for a different job?**

- 1            Yes.....(Go to DW\_Q12)
- 2            No  
              DK, RF

Default:        (Go to DW\_Q14)

Coverage:        *Respondents who have lost a job since the age of 50 and that are back at work*



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**DW\_Q12**      **Did you find a new job?**

1              Yes.....(Go to DW\_Q13)  
2              No  
                 DK, RF

Default:        (Go to DW\_Q14)

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for a job during displacement*

**DW\_Q13**      **Was that a full time or part time job?**

1              Full-time  
2              Part-time  
                 DK, RF

Default:        (Go to DW\_Q17)

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_Q14**      **Did you become self-employed?**

1              Yes.....(Go to DW\_END)  
2              No  
                 DK, RF

Default:        (Go to DW\_Q15)

Coverage:      *Respondents who have lost a job since the age of 50 AND are back at work AND did not look for a job or looked but did not find a job during displacement*

**DW\_Q15**      **Did you retire?**

1              Yes.....(Go to DW\_Q16)  
2              No  
                 DK, RF

Default:        (Go to DW\_END)

Coverage:      *Respondents who have lost a job since the age of 50 but are back at work AND did not look for a job or looked but did not find a job during displacement AND did not become self employed*

**DW\_Q16**      **Was your retirement voluntary or did you feel forced to retire because you could not find suitable work?**

1              Voluntary  
2              Felt forced to retire  
                 DK, RF

Default:        (Go to DW\_END)

Coverage:      *Respondents who have lost a job since the age of 50 AND are back at work AND did not look for a job or looked but did not find a job during displacement AND did not become self employed AND retired*

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**DW\_Q17      How did you find your job?**

INTERVIEWER: Read categories to respondent.

- 01      Placement service
- 02      Previous employer's Human Resources department
- 03      Public employment program
- 04      Word of mouth
- 05      Direct contact
- 06      Other - including newspaper ads and internet..... (Go to DW\_S17)  
DK, RF

Default:      (Go to DW\_Q18)

Note:      The fifth category "Direct contact" was created during Head Office processing based on answers found in the "Other Specify" category.

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_S17      How did you find your job?**

INTERVIEWER: Specify.

\_\_\_\_(80 spaces)

**DW\_Q18      Was it with the same company?**

- 1      Yes
- 2      No  
DK, RF

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_Q19      Were you doing the same type of work?**

- 1      Yes
- 2      No  
DK, RF

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

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**DW\_Q20**      **What obstacles did you face when trying to find a job?**

INTERVIEWER: Read categories to respondent. Mark all that apply.

01            Wrong skills  
02            No work available  
03            Did not want to move  
04            Wage offer too small, not worth it  
05            Other - Specify..... (Go to DW\_S20)  
06            Nothing  
              DK, RF

Default:        (Go to DW\_Q21)

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_S20**      **What obstacles did you face when trying to find a job?**

INTERVIEWER: Specify.

\_\_\_\_\_(80 spaces)

**DW\_Q21**      **Did you have to upgrade your skills, acquire new skills or obtain a different accreditation to get this new job?**

1            Yes  
2            No  
              DK, RF

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_Q22**      **Was the new job in the same community or did your family and you have to move to a new community?**

1            Same community  
2            Had to move .....(Go to DW\_Q23)  
              DK, RF

Default:        (Go to DW\_Q24)

Coverage:      *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_Q23**      **Did your new employer provide you with any financial assistance to help you move?**

1            Yes  
2            No  
              DK, RF

Coverage:      *Respondents who have lost a job since the age of 50 AND are back at work AND looked for and found a job during displacement AND had to relocate*

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**DW\_Q24**      **Was your new job for...?**

INTERVIEWER: Read categories to respondent.

- 1            Less pay - over 25% less
  - 2            About the same pay - within 25% either way
  - 3            More pay - over 25% more
- DK, RF

*Coverage:*            *Respondents who have lost a job since the age of 50 and are back at work and looked for and found a job during displacement*

**DW\_END**      End of section.

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