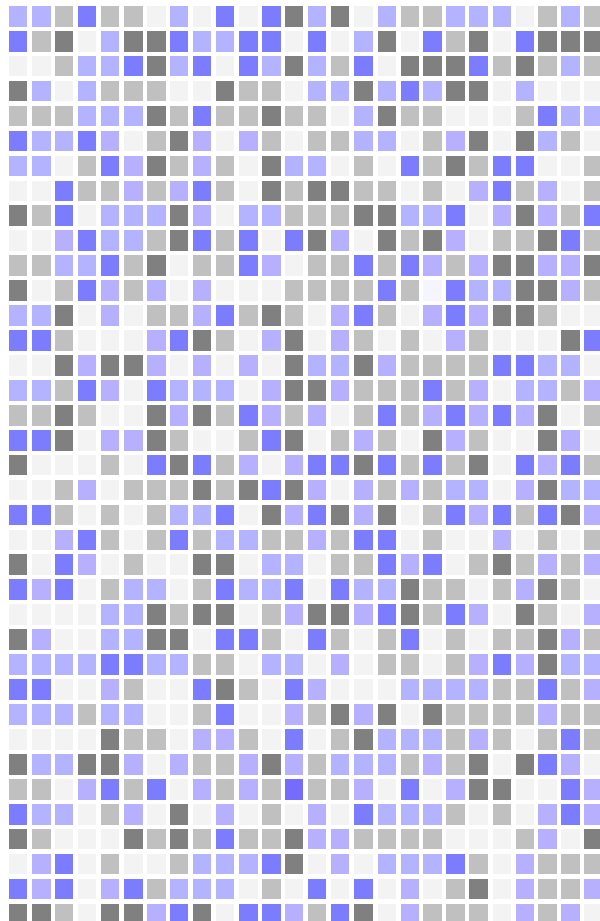


Aging in Asia and Oceania

AARP Multinational Survey of Opinion Leaders 2006

Japan Country Report
March 2007

Prepared by Princeton Survey Research Associates
International for **AARP**



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Introduction

In 2006 AARP commissioned Princeton Survey Research Associates International (PSRAI) to conduct a survey of opinion leaders in Japan, six other countries in Asia and Oceania, and the United States. The survey was designed to increase AARP's knowledge of aging issues and attitudes in key Asian markets, including Japan, and to compare attitudes and policies towards aging in the US to attitudes and policies in Asian and Oceania societies. Populations in many countries, including Japan, are growing older as life expectancy increases and birth rates decline. In response to this demographic trend, this survey of opinion leaders sought to address questions such as the perceived importance of population aging, the types of challenges and opportunities societies are expected to face because of population aging, the degree to which different sectors of society are prepared for the changing demographics, the different ways in which societies address retirement security and quality of life issues in old age, and attitudes toward older people and their place in society.

To help answer these questions, interviewers spoke with more than 400 opinion leaders in Australia, China, India, Japan, New Zealand, Singapore, South Korea, and the US. The survey sample consists of opinion leaders and experts who hold senior level positions in government, nongovernmental organizations, private sector, media, and academia.

The following report begins with an overview of survey highlights and implications and a short summary of key findings, focusing on Japanese opinion leaders. The summary materials are followed by a detailed discussion of the survey results in Japan divided into five sections: (1) Overall themes, (2) Older workers: extending work lives, (3) Retirement security and life quality, (4) Perceptions of older people, and (5) Aging advocacy organizations.

Highlights–Japan

Population aging a high priority issue

- ▶ Most Japanese opinion leaders consider population aging and decreasing birth rates to be an important trend that should not be ignored in favor of other pressing issues. The survey results also indicate that Japanese opinion leaders do not necessarily see increasing life expectancy and decreasing birth rates as a one-sided phenomenon, but many associate both challenges and opportunities with the growing population of older people.

Population aging presents opportunities...

- ▶ On the positive side, population aging will mean the potential availability of knowledgeable and experienced older people to contribute as productive members of the workforce and the creation of new markets for products and services targeted at older people. Japanese opinion leaders generally agree that population aging is an opportunity to create new roles for older people in society. Older people are seen as helpful, contributing members of society and older workers as wise and respected. Most Japanese opinion leaders believe that the government should do more to take advantage of the contributions that older people can make to the community by enlisting them to help with community projects. But in addition to being viewed as producers, older people are also perceived as consumers. Almost all Japanese opinion leaders believe that the business community already views older people as an opportunity for marketing and selling products and services.
- ▶ Japanese opinion leaders have faith that technology, such as computers and robots, will help improve the lives of older people. Most Japanese opinion leaders predict that technology will be at least somewhat helpful in extending the productive work lives of older workers, extending independent living by older people, and improving health and medical care of older people.

...and challenges

- ▶ On the negative side, Japanese opinion leaders worry about providing retirement income, health care, and housing to a growing population of older people and the degree to which employers are prepared for an increasing number of older workers. Labor shortages are also looming. Most Japanese opinion leaders believe that Japan is likely to experience labor shortages over the next 20 years. A majority of these opinion leaders—half of all Japanese opinion leaders—predict that their country will adopt more liberal immigration policies to compensate. While extending work lives is another potential solution, nearly half of Japanese opinion leaders doubt that businesses see older people as a potential source of productive labor and a solid majority think that employers are poorly prepared for a future workforce comprised of more older workers. Most Japanese opinion leaders report that discrimination against older people is a problem when employers are recruiting and hiring new employees, and the opinion leaders themselves often have less than complimentary views of older workers when it comes to their technological savvy, ability to acquire new skills, flexibility, and productivity. Despite these negative perceptions, Japanese opinion leaders generally agree that older workers should be accommodated and that businesses have a responsibility to society to address issues related to an older workforce. But a majority of Japanese opinion leaders

doubt that businesses have the necessary financial resources or the knowledge and expertise needed to do so. Notably, Japan stands out among the eight countries surveyed as the country with the highest share of opinion leaders who do not see workers as older until age 65 or older.

Providing for older people a hurdle

- ▶ Even if work lives are extended, Japanese opinion leaders acknowledge that there are limits to how long most people are likely to remain in the workforce. Although a slim majority of Japanese opinion leaders oppose the idea of a mandatory retirement age, the average opinion leader thinks that most men should retire at 66, most women at 65. And Japanese opinion leaders reach no consensus on whose responsibility it is to provide for older people after they are no longer working. A plurality of Japanese opinion leaders believe that the government has primary responsibility for providing for older people. But others think that individual older people are responsible for providing for themselves or that family members or employers are responsible. Although a solid majority of Japanese opinion leaders agree that the family's role in providing retirement income or money for health care should be small at best, opinions are divided when it comes to family assistance in day-to-day lives of older relatives.
- ▶ Although a majority of Japanese opinion leaders describe the overall quality of life of older Japanese as good, the situation is expected to worsen over the next two decades. According to Japanese opinion leaders, the average older person is already struggling to make do with the available retirement income, and although health care may currently be available to all older people, Japanese opinion leaders report that their health care system is not well prepared to deal with an aging population. Japanese opinion leaders call for increased government efforts to ensure that older people receive the health care services they need.

Japan not prepared

- ▶ A solid majority of Japanese opinion leaders report that Japan is poorly prepared to deal with changes that may result from the aging of the population. However, this lack of preparedness is not necessarily for want of expertise or attention. According to a majority of Japanese opinion leaders, Japan's government has the necessary knowledge and expertise to address issues related to the aging of the population. And standing apart from the other surveyed countries, Japanese opinion leaders maintain that, with the exception of younger people, different groups in society are paying the right amount, or even too much, attention to population aging.

Mixed support for policy changes

- ▶ Japanese opinion leaders do not agree on policy tools to compensate for the increased costs of caring for an aging population, with mixed support for tax increases, retirement age increases, and pension reductions. Moreover, a majority of Japanese opinion leaders reject significant mandatory private savings and public education campaigns emphasizing the importance of savings. Japanese opinion leaders also report that labor unions and the business community are not very committed to improving the lives of older people.

Most not familiar with AARP but welcome AARP involvement

- ▶ Most Japanese opinion leaders are not familiar with AARP. However, among those with some degree of familiarity, the view of the organization is favorable or neutral, never unfavorable. Moreover, Japanese opinion leaders generally think that it would be helpful if AARP were to play a role in countries outside the US by educating people about issues related to aging and retirement, meeting with government policy makers to exchange information, helping establish AARP-style organizations in other countries, and organizing conferences to bring together policy makers and aging experts from various countries. Most Japanese opinion leaders would welcome an AARP-style organization in their country. According to these opinion leaders, such an organization would be helpful when it comes to raising awareness about aging, influencing government policy, and providing knowledge and expertise.

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Implications–Japan

Receptive audience on aging issues

- ▶ Most Japanese opinion leaders consider population aging to be an important, high priority issue. Japanese opinion leaders are aware of the aging trend, receptive to new ideas, and willing to consider ways to address challenges associated with population aging.

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Policy action needed to improve life quality...

- ▶ At least some older people in Japan already lack access to an adequate retirement income and opinion leaders believe the health care system is not prepared for an aging population. Without policy action, these problems are likely to grow, as the share of older people in the population increases. With little consensus on who is responsible for providing for older people and on what the best policy tools are, the challenge for Japan will be to prevent gridlock and find policy solutions acceptable to a large enough share of society.

...and conditions for older workers

- ▶ As the number of older workers increases, workplaces will need to adjust. While Japanese opinion leaders support accommodating older workers, policy action may be needed to bring the business community aboard, improve perceptions of older workers, and reduce age discrimination.

Openness to AARP-style organizations

- ▶ Japanese opinion leaders are open to organizations that work to improve the quality of life of older people and serve as an information source on aging issues. AARP-organized activities are welcomed in Japan.

Section 1: Overall themes

In many countries around the world, including Japan, decreasing birth rates and higher life expectancy are resulting in a demographic shift known as population aging—a shift to a higher share of older people in the population. As the table below shows, Japan’s already relatively high percentage of the population age 60 or older is expected to rise further, from 27 percent in 2006 to an estimated 42 percent by 2050.

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Figure 1.1

Key statistics

	Median age ¹		Population aged 60 or older ²		Growth ratio	Potential support ratio ³	
	2006		% 2006	% 2050		2006	2050
Japan	43		27	42	1.6	3	1
Australia	37		18	30	1.7	5	3
New Zealand	34		17	30	1.8	5	3
United States	37		17	26	1.5	5	3
South Korea	35		14	41	2.9	7	2
Singapore	37		13	38	2.9	8	2
China	33		11	31	2.8	9	3
India	25		8	21	2.6	12	5

In this first section, we discuss Japanese opinion leaders’ general views of population aging, including the degree of urgency required to address the issue, the likely consequences of a shifting population structure, and the degree to which Japanese opinion leaders believe that their country is prepared to deal with an aging population.

¹ Source: CIA World Factbook.

² Source: United Nations.

³ Ratio of population aged 15 to 64 years to the population aged 65 or older. Source: United Nations.

Importance of population aging

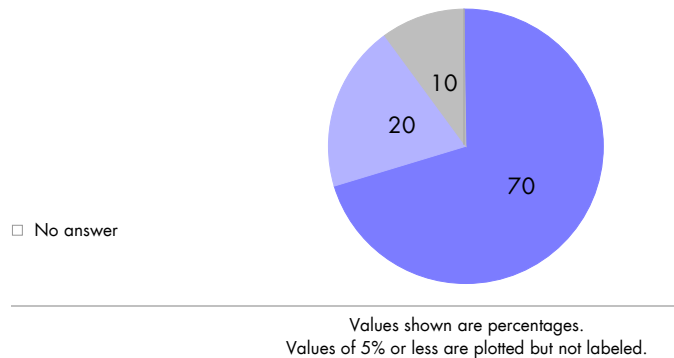
Japanese opinion leaders generally see population aging as an important issue with high priority. A solid majority of seven in 10 Japanese opinion leaders (70%) say that, compared to other issues facing their country, population aging is a *very* important issue, and most of the rest (20%) characterize it as a *somewhat* important issue. Only one in 10 Japanese opinion leaders (10%) think that the aging of the population is not a very important matter, thus underscoring the perceived importance of the issue in Japan.

Consistent with the perception that population aging is an important issue, a majority of Japanese opinion leaders believe that it should rank high on the list of issues for their country to address. Six in 10 Japanese opinion leaders (60%) reject the statement “the aging of the population should not be a priority; we have other, more pressing issues to address,” although many of these opinion leaders only somewhat disagree with the statement. Notably, nearly four in 10 Japanese opinion leaders (38%) at least somewhat agree that there are more important issues to address before tackling population aging.

Figure 1.2

Importance of population aging

► Compared to other issues facing our country, how important an issue is the aging of the population—[●] very important, [●] somewhat important, [●] not very important or [●] not important at all?⁴

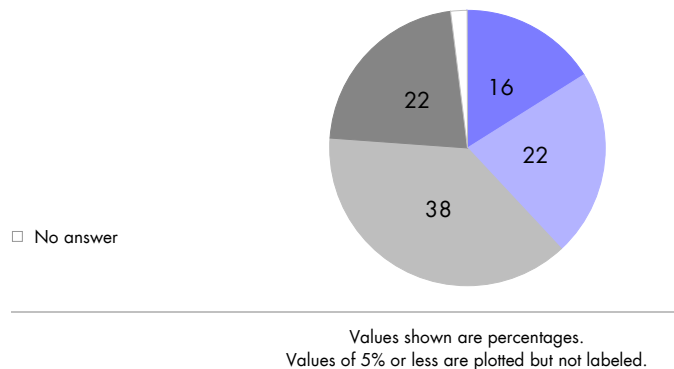


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 1.3

Should population aging not be a priority?

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: The aging of the population should not be a priority; we have other, more pressing issues to address.



AARP, *Aging in Asia and Oceania*, March 2007.

⁴ Except where otherwise noted, all results in this report are based on the full sample of 50 Japanese opinion leaders.

Top economic challenges

Further reinforcing the finding that the aging of the population is a priority issue, many Japanese opinion leaders consider low birth rates and the growing population of older people to be among the most important economic challenges facing their country.⁵ Asked to name up to three economic challenges, low birth rates (36%) and population aging (34%) top the list, followed by pension payments (18%). In addition, Japanese opinion leaders worry about slow economic growth (16%) and income inequality (10%).

Among the eight countries surveyed, Japan and Korea are the only countries where a notable number of opinion leaders name low birth rates as a top economic challenge.

Impact of population aging

Like opinion leaders in the other surveyed countries, Japanese opinion leaders associate both challenges and opportunities with population aging. As life expectancy increases and birth rates decline, the results will be both positive and negative, according to a slim majority of Japanese opinion leaders (52%). At the same time, roughly a third of Japanese opinion leaders (36%) believe that the impact of the demographic shift will be mostly negative. Few opinion leaders (10%) foresee a mostly positive outcome to population aging.

Figure 1.4

Top economic challenges

► In your opinion, what are the most important economic challenges facing our country in the next 20 years?

Low birth rate	36%
Growing population of older people/aging of the population	34
Paying for pensions, retirement income	18
Slow economic growth/development	16
Income inequality/gap between rich and poor	10

Based on multiple mentions.

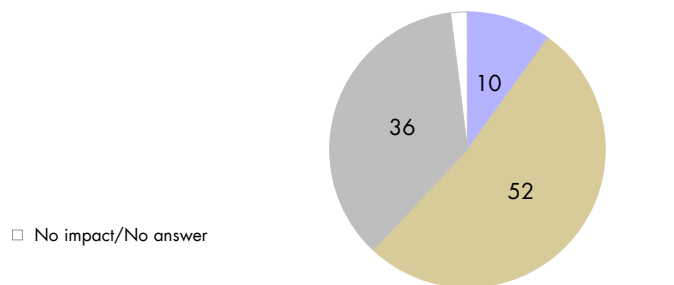
AARP, *Aging in Asia and Oceania*, March 2007.

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Figure 1.5

Impact of population aging

► The populations of many countries are growing older as life expectancy increases and birth rates decline. Do you think the aging of the population will have a [●] largely positive, [●] largely negative, or [●] both a positive and negative impact on our country over the next 20 years?



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

⁵ It should be noted that this was the first question asked and opinion leaders knew the topic of the survey prior to the interview, which could have influenced their response to this question.

Positive consequences of population aging

According to Japanese opinion leaders, the biggest positive consequence of population aging will be having access to the knowledge and experience of older people. Asked to think of ways in which the aging of the population will have a positive impact on their country or provide new opportunities over the next 20 years, a plurality of Japanese opinion leaders (41%) point to older people's knowledge and experience. In addition, about one in 10 Japanese opinion leaders mention the economic benefit of marketing products and services to satisfy older consumers (12%) and the potential of older people to remain productive members of the workforce (12%).

In regards to another potential positive consequence, Japanese opinion leaders overwhelmingly agree that the aging of the population is an opportunity to create new roles for older people. Almost all Japanese opinion leaders (96%) agree with this sentiment, with a majority saying they strongly agree. Only four percent of Japanese opinion leaders disagree.

Figure 1.6

Positive consequences of population aging

► In what ways will the aging of the population have a positive impact on our country or provide new opportunities over the next 20 years?⁶

Knowledge and experience of older people	41%
Market for products and services	12
Potential pool of productive workers	12

Based on multiple mentions.

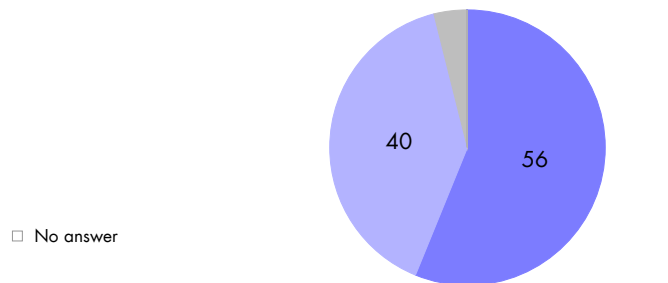
AARP, *Aging in Asia and Oceania*, March 2007.

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Figure 1.7

Opportunity to create new roles

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: The aging of the population is an opportunity to create new roles for older people in our country.



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

⁶ These results are based on 49 respondents.

Negative consequences of population aging

On the negative side, opinion leaders in Japan are most worried about providing retirement income to an aging population. Asked how the aging of the population will have a negative impact or pose new challenges over the next 20 years, a plurality of Japanese opinion leaders (43%) mention increased costs of providing retirement income. Some opinion leaders also point to the increased cost of providing health care to an aging population (18%), a greater fraction of the population being out of the workforce (10%), and economic difficulties in general (10%).

Figure 1.8

Negative consequences of population aging

► In what ways will the aging of the population have a negative impact or pose new challenges over the next 20 years?⁷

Increased cost of providing pensions/retirement income	43%
Increased cost of providing health care	18
Greater fraction of population out of the workforce	10
Economic problems	10

Based on multiple mentions.

AARP, *Aging in Asia and Oceania*, March 2007.

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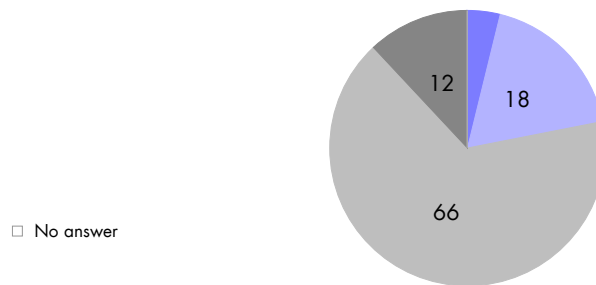
Preparedness for population aging

Japanese opinion leaders do not think that their country is prepared to address issues arising due to population aging. About eight in 10 Japanese opinion leaders (78%) report that their country is not too prepared or not prepared at all to deal with potential changes that may result from the aging of the population. And although 18 percent of Japanese opinion leaders consider their country to be somewhat prepared, only four percent describe Japan as very prepared.

Figure 1.9

Overall preparedness

► Overall, how prepared is our country to deal with potential changes that may result from the aging of the population—[●] very prepared, [●] somewhat prepared, [●] not too prepared, or [●] not prepared at all?



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

⁷ These results are based on 49 respondents.

This perceived lack of preparation does not appear to be caused by a lack of expertise in the area. Two thirds of Japanese opinion leaders (68%) believe that their country has the necessary knowledge and expertise to address issues related to the aging of the population. However, those who only somewhat agree with this assessment by far outnumber those who strongly agree (56% versus 12%). And a third of Japanese opinion leaders (32%) outright disagree.

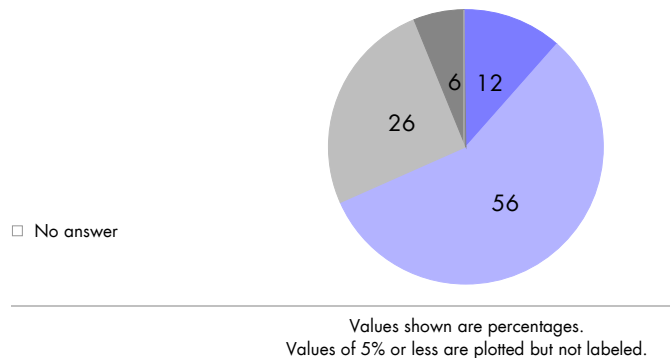
Level of attention paid by groups and institutions

Being prepared as a country to handle the potential changes that may result from an aging population arguably requires the efforts of a variety of groups and institutions. Japan's lack of preparation does not appear to be caused by lack of attention to the matter. Standing apart from most of the other countries surveyed, Japanese opinion leaders maintain that most sectors of society are paying enough attention to population aging. The only ones not paying enough attention, according to most opinion leaders (82%), are younger people in Japan. A majority of Japanese opinion leaders report that other groups and institutions are either paying the right amount or too much attention to population aging. Most notably, about seven in 10 Japanese opinion leaders (72%) say that the central government of Japan is on the right track, and a majority say the same about labor unions (62%) and the business community (52%). At the same time, fully half of opinion leaders in Japan (50%) say that the health care community is paying too much attention, and notable minorities say the same about older people (42%) and local governments (30%).

Figure 1.10

Government knowledge and expertise

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Our government has the necessary knowledge and expertise to address issues related to the aging of the population.

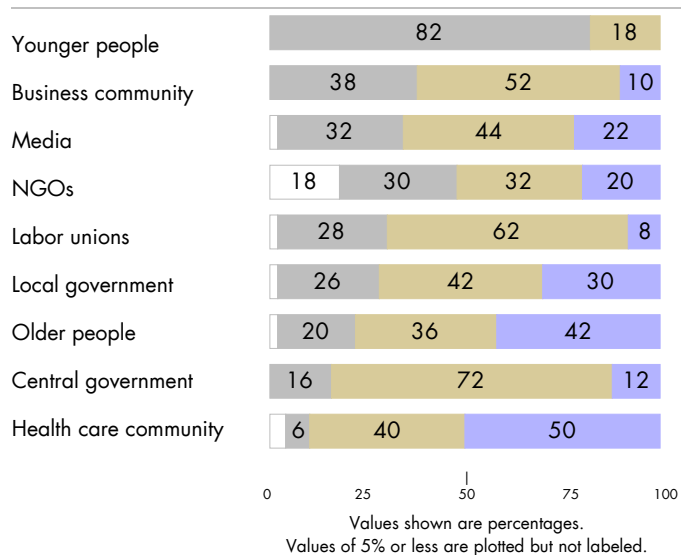


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 1.11

Level of attention paid by groups and institutions

► In your opinion, have the following groups and institutions paid [●] too much attention, [●] about the right amount of attention, or [●] too little attention to the aging of the population and the challenges and opportunities associated with it?



AARP, *Aging in Asia and Oceania*, March 2007.

Section 2: Older workers: extending work lives

Extending work lives is one potential solution to some of the challenges associated with population aging. If capable older workers were to postpone retirement, this would help them financially and take some of the pressure off of the younger, shrinking workforce. And with advancing medical care and improved health, more workers may be in shape to keep their jobs beyond the traditional retirement age. But is the Japanese business community or the society at large prepared for an older workforce? In this section, we discuss Japanese opinion leaders' ideas of what constitutes an older worker, perceptions of the degree to which businesses are prepared for an older workforce and how they should accommodate older workers, and what is an appropriate age for people to retire. We also touch on Japanese opinion leaders' views of potential labor shortages.

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When is a worker an “older worker”?

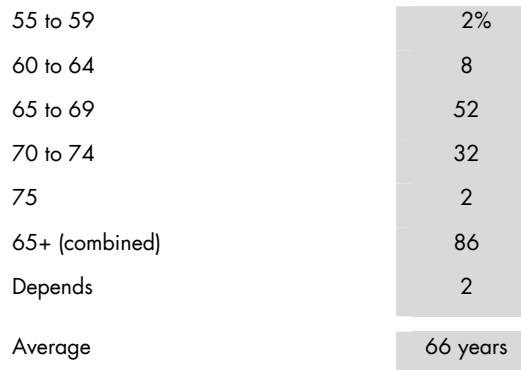
Averaging 66 years of age, most Japanese opinion leaders consider workers to be “older” after reaching their mid-60s. Although responses range from a low of 55 to a high of 75, a slim majority of Japanese opinion leaders (52%) would define a worker as an “older worker” somewhere between the ages of 65 and 69. The next most often mentioned age group is 70 to 74 (32%).

Among the eight countries surveyed, Japan stands out with the highest share of opinion leaders who do not see workers as older until age 65 or older. Nearly nine in 10 Japanese opinion leaders (86%) think workers can be considered to be older workers at age 65 or later. The US is the only other country where a majority—albeit a much more modest majority (51%)—share this view.

Figure 2.1

When is a worker an “older worker”?

► In your opinion, at what age is a worker an “older worker”?



AARP, *Aging in Asia and Oceania*, March 2007.

Employer preparedness

According to Japanese opinion leaders, Japanese employers are not prepared for a future workforce comprised of more older workers.⁹ A solid majority of Japanese opinion leaders (72%) report that employers are not too well prepared or not well prepared at all. And although a quarter of Japanese opinion leaders (26%) describe employers as somewhat prepared, very few (2%) think that they are very well prepared.

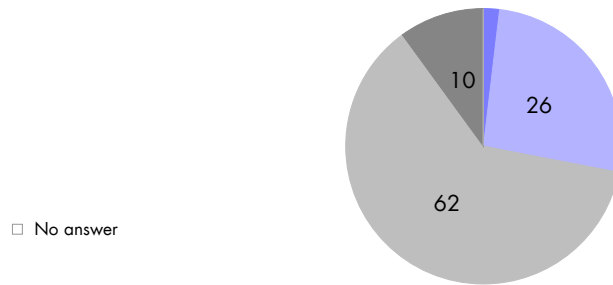
Discrimination

Age discrimination is a problem in the Japanese workplace. Nearly nine in 10 (86%) Japanese opinion leaders report that when employers are recruiting and hiring new employees discrimination against older people is at least a moderate problem. More specifically, a slim majority of Japanese opinion leaders (52%) think that age discrimination is a big problem, and an additional third (34%) say that it is a moderate problem. Fewer than two in 10 Japanese opinion leaders (14%) think that age discrimination in recruiting and hiring is a small problem or not a problem at all.

Figure 2.2

Employer preparedness for older workers

► In your opinion, how well prepared are employers for a future workforce comprised of more older workers—[●] very well, [●] somewhat well, [●] not too well, or [●] not well at all?⁸



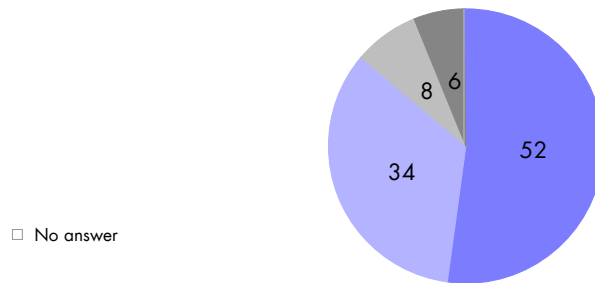
Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

Figure 2.3

Discrimination against older people

► To the best of your knowledge, is discrimination against older people [●] a big problem, [●] moderate problem, [●] small problem, or [●] not a problem at all when employers are recruiting and hiring employees?¹⁰



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

⁸ Opinion leaders representing the private sector were asked about their industry: "In your opinion, how well prepared are employers in your industry for a future work force comprised of more older workers?"

⁹ Prior to being asked the first survey question about "older workers," all opinion leaders were read the following text: "For the rest of this interview, when we ask about older workers, we are referring to workers who are 50 years of age or older."

¹⁰ Opinion leaders representing the private sector were asked about their industry: "To the best of your knowledge, is discrimination against older people a big problem, a moderate problem, small problem, or not a problem at all when employers in your industry are recruiting and hiring employees?"

Perceptions of older workers

Many Japanese opinion leaders have rather negative attitudes toward older workers. As in the other surveyed countries, opinion leaders in Japan find older workers to be wise and respected, but a majority of Japanese opinion leaders are less complimentary when asked about other qualities of older workers. Almost all Japanese opinion leaders (94%) describe older workers as wise, and more than seven in 10 (76%) describe them as respected. However, a majority of Japanese opinion leaders think that open to new technology (86%), fast learners (80%), flexible (60%), and productive (52%) do not describe older workers too well or do not describe them well at all.

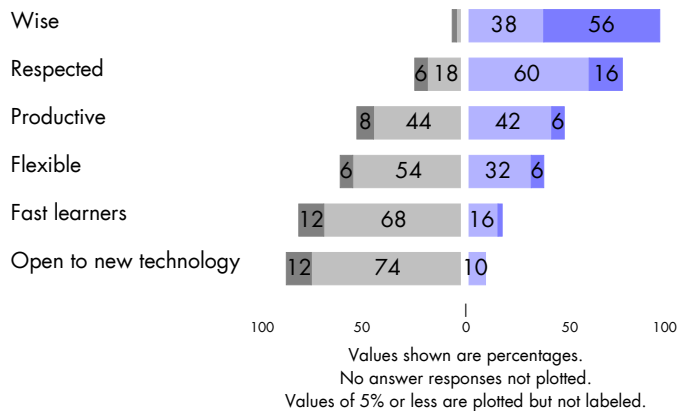
Accommodating older workers

Despite somewhat negative perceptions of older workers, Japanese opinion leaders are generally supportive of accommodating older workers in various ways. Roughly nine in 10 Japanese opinion leaders support allowing older workers to work fewer hours (92%) and providing older workers with opportunities for additional training and education (88%). A solid majority of Japanese opinion leaders also support establishing and enforcing policies that prohibit discrimination based on age at the workplace (80%) and offering older workers a different position with fewer responsibilities (72%). However,

Figure 2.4

Perceptions of older workers

► In your opinion, how well do the following words describe older workers—[●] very well, [●] somewhat well, [●] not too well, or [●] not well at all?¹¹

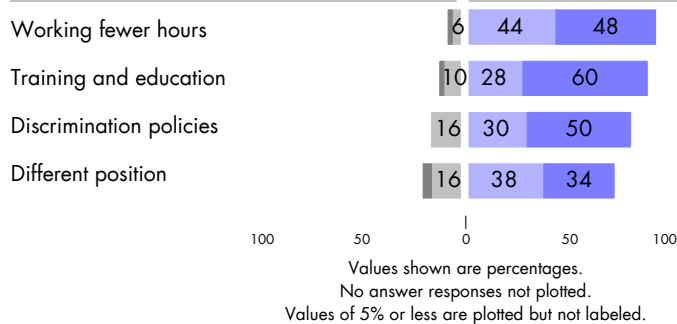


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 2.5

Accommodating older workers

► Next, thinking about ways in which employers may accommodate older workers, do you [●] strongly support, [●] somewhat support, [●] somewhat oppose, or [●] strongly oppose the following practices?¹²



AARP, *Aging in Asia and Oceania*, March 2007.

¹¹ Opinion leaders representing the private sector were asked about their industry: "In your opinion, how well do the following words describe older workers in your industry?"

¹² Opinion leaders representing the private sector were asked about their industry: "Next, thinking about ways in which employers in your industry may accommodate older workers, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the following practices?"

training and education is the only accommodation that receives *strong* support from a majority of Japanese opinion leaders.

In addition to supporting various practices to accommodate older workers, technology will help extend work lives, according to Japanese opinion leaders. About eight in 10 Japanese opinion leaders (78%) predict that technology, such as computers and robots, will be helpful in extending productive work lives in their country over the next 20 years, although a majority predict that technology will only be somewhat, rather than very, helpful. Roughly a quarter of Japanese opinion leaders (22%) are even more pessimistic regarding the role of technology in extending work lives, saying that it will not be too helpful or that it will not be helpful at all.

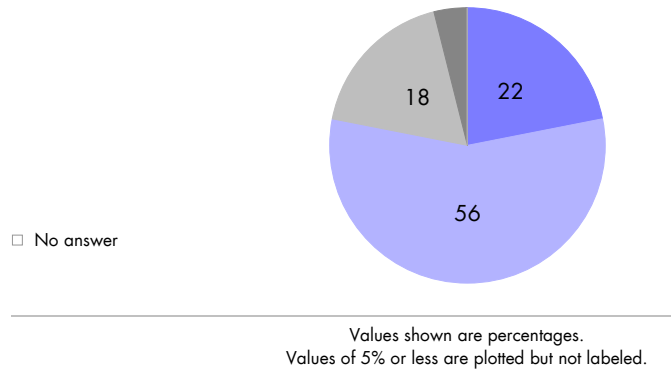
Employers' capacity to address aging issues

Although Japanese opinion leaders support accommodating older workers, they are often doubtful that businesses have the necessary capacities to address issues related to an older workforce. Almost all Japanese opinion leaders (90%) agree that private businesses have a responsibility to society to address these issues—and a majority believe this strongly—but a much slimmer majority (54%) believe that private businesses have the will and desire to do so. And a majority of Japanese opinion leaders disagree that private businesses have the necessary financial resources (78%) or the needed knowledge and expertise (60%) to address issues related to an older workforce.

Figure 2.6

Helpfulness of technology in extending productive work lives

► How helpful do you think technology, such as computers and robots will be in extending the productive work lives of older workers in our country over the next 20 years—[●] very helpful, [●] somewhat helpful, [●] not too helpful, or [●] not helpful at all?

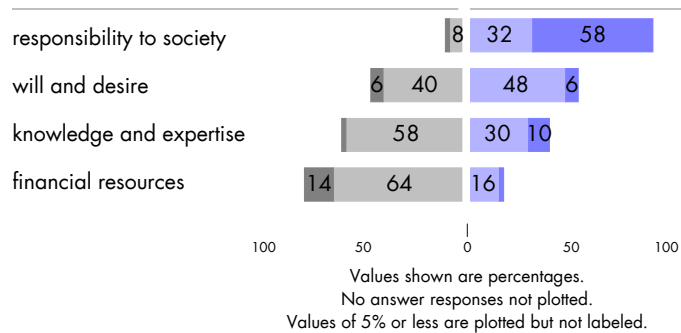


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 2.7

Employer capacity to address aging issues

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statements: In general, private businesses have [INSERT] to address issues related to an older workforce.¹³



AARP, *Aging in Asia and Oceania*, March 2007.

¹³ Opinion leaders representing the private sector were asked about their industry: "In general, private businesses in your industry have [INSERT] to address issues related to an older work force."

Industries doing a good job

Asked if there is a particular business sector or industry that is already doing a good job of employing and using older workers to their full potential, Japanese opinion leaders most frequently point to the manufacturing and construction industries (22%), followed by services (16%) and agriculture (12%). A few Japanese opinion leaders also mention academia (8%), social welfare services (6%), nonprofit organizations (2%), or the government (2%). At the same time, a notable share of Japanese opinion leaders say that no such industry exists (12%) or that they do not know whether such an industry exists (14%).

Appropriate retirement age

According to the average Japanese opinion leader, the appropriate retirement age for men is 66 and for women 65. By far the single most popular retirement age is 65, with half of the Japanese opinion leaders saying that that is the age when most male (50%) and female (48%) workers should retire. A notable share of Japanese opinion leaders propose an ever higher retirement age—beyond age 65—for both men (24%) and women (20%).

Figure 2.8

Industries doing a good job

► To the best of your knowledge, is there a particular business sector or industry in our country that is doing a good job of employing and using older workers to their full potential?

Manufacturing/Construction	22%
Services	16
Agriculture	12
Academia	8
Social welfare services	6
Nonprofits/Charitable organizations	2
Government	2
No such industry	12
Don't know	14

AARP, *Aging in Asia and Oceania*, March 2007.

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Figure 2.9

Best retirement age

► In general, at what age do you think [most male workers/most female workers] should retire or stop working?

	Males	Females
50 to 54	0%	2%
55 to 59	0	2
60	6	14
61 to 64	4	0
65	50	48
66 to 69	4	2
70	18	14
71 to 74	0	0
75	2	4
65+ (Combined)	74	68
Never	10	8
Depends	6	6
Average	66 years	65 years

AARP, *Aging in Asia and Oceania*, March 2007.

Mandatory retirement age

The idea of a mandatory retirement age splits Japanese opinion leaders. Although a slim majority (52%) oppose the idea, nearly as many Japanese opinion leaders (44%) express support for enforcing an age when everyone is required to exit the workforce.

Most of those who support the idea think that the mandatory retirement age should be 65. Nearly eight in 10 of these opinion leaders (77%) propose this as the most appropriate age for workers to transition into retirement.¹⁴

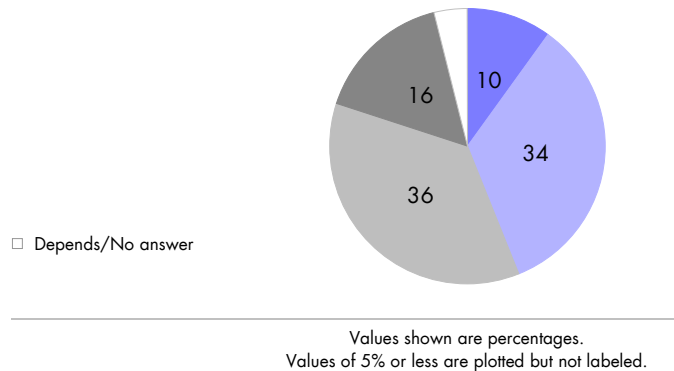
Labor shortage

Similar to opinion leaders in most of the other surveyed countries, Japanese opinion leaders foresee their country facing a labor shortage in the coming years. About eight in 10 Japanese opinion leaders (82%) believe that Japan is likely to experience a labor shortage within the next 20 years, and many of these opinion leaders believe that this development is very likely. Only about two in 10 Japanese opinion leaders (18%) believe that such shortages are not too likely or not likely at all to occur in Japan.

Figure 2.10

Mandatory retirement age

► In some countries workers are required to retire at a particular age. Do you [●] strongly support, [●] somewhat support, [●] somewhat oppose, or [●] strongly oppose the idea of a mandatory retirement age?

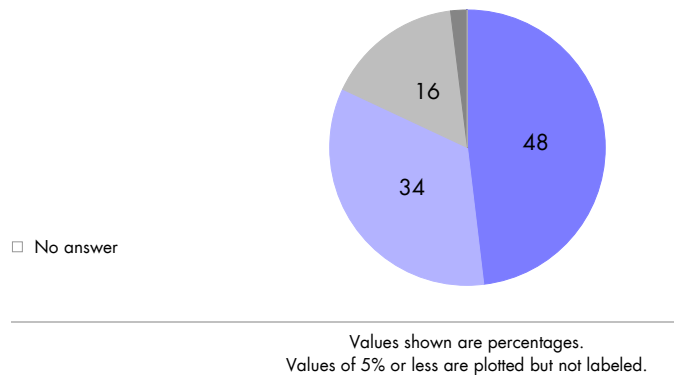


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 2.11

Likelihood of labor shortage

► In your view, how likely is it that our country will experience a labor shortage within the next 20 years—[●] very likely, [●] somewhat likely, [●] not too likely, or [●] not likely at all?



AARP, *Aging in Asia and Oceania*, March 2007.

¹⁴ These results are based on 22 respondents.

According to many of the Japanese opinion leaders who think that there will be a labor shortage, more liberal immigration policies are one likely solution to compensate for it. A majority of the Japanese opinion leaders who predict a labor shortage (61%) believe that their country is likely to adopt more liberal immigration policies to help recruit more workers. However, those who believe a relaxation of immigration restrictions is somewhat likely by far outnumber those who believe it is a very likely development (51% versus 10%). And a sizable minority of Japanese opinion leaders (39%) believe that their country is not too likely or not likely at all to adopt more liberal immigration policies.

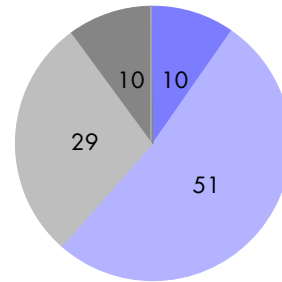
Those who believe that Japan is likely to adopt more liberal immigration policies to compensate for a labor shortage constitute half of all Japanese opinion leaders (50%). A third (32%) say that Japan is unlikely to adopt more liberal immigration policies in response to labor shortages, while the rest (18%) think that Japan is unlikely to experience labor shortages and were, therefore, not asked the question about immigration policies.

Figure 2.12

More liberal immigration policies

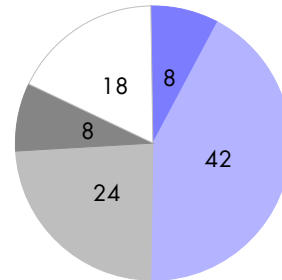
► How likely is it that we will adopt more liberal immigration policies to compensate for this labor shortage—[●] very likely, [●] somewhat likely, [●] not too likely, or [●] not likely at all?

Opinion leaders who think labor shortages are likely¹⁵



□ No answer

All opinion leaders



□ Not asked question

Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

¹⁵ These results are based on 41 respondents.

Section 3: Retirement security and life quality

Retirement security and quality of life issues will undoubtedly take center stage as more people reach retirement age and enjoy a longer life span after retiring. In this section, we discuss Japanese opinion leaders' perceptions of the quality of life enjoyed by older people in their country, including retirement income, health care, and housing. We also address their opinions regarding whose responsibility it is to provide for people after retirement, the family's role in caring for older people, and potential policy changes in response to the growing population of older people.

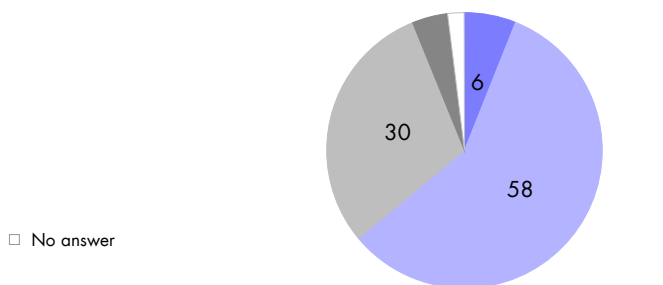
Quality of life

Asked to describe the overall quality of life of older people in their country, a majority of Japanese opinion leaders give a cautiously positive response.¹⁶ Two thirds of Japanese opinion leaders (64%) describe the overall quality of life of older people in their country as good, although those who describe it as somewhat good by far outnumber those who describe it as very good (58% versus 6%). At the same time, a third of Japanese opinion leaders (34%) report that older people's life quality is somewhat, or even very, bad.

Figure 3.1

Overall quality of life

► How would you describe the overall quality of life of older people in our country—it is [●] very good, [●] somewhat good, [●] somewhat bad, or [●] very bad?



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

¹⁶ Prior to being asked the first survey question about "people in their old age," all opinion leaders were read the following text: "In the following questions, when we ask about people in their old age or older people, we are referring to older people who are retired or past retirement age. By retired, we mean no longer working for pay."

Adequacy of retirement income

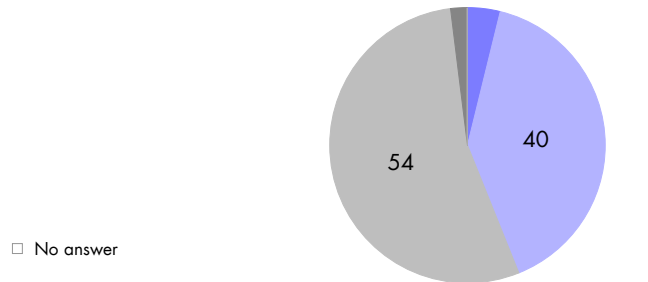
Despite the cautiously positive evaluation of older people's overall life quality, Japanese opinion leaders' assessment of retirement incomes in their country leans slightly toward the negative. A modest majority of Japanese opinion leaders (56%) report that the average older person relying on government or employer pensions is not living too comfortably or is not living comfortably at all. At the same time, however, nearly half of Japanese opinion leaders (44%) say that the average older person's pension and benefits are enough for at least a somewhat comfortable life.

Regardless of the status of the average retiree, a solid majority of Japanese opinion leaders contend that at least some older people are left without an adequate retirement income. Two thirds of Japanese opinion leaders (64%) reject the statement "an adequate retirement income is available to people of all social and economic backgrounds in our country." However, roughly a third of Japanese opinion leaders (36%) view the situation differently and state that, at least to a degree, an adequate retirement income is available, regardless of a person's socioeconomic background.

Figure 3.2

Adequacy of retirement income

► Do you think that the average older person's pension and benefits from the government or from their employers is generally sufficient for an older person to live [●] very comfortably, [●] somewhat comfortably, [●] not too comfortably, or [●] not comfortably at all?



□ No answer

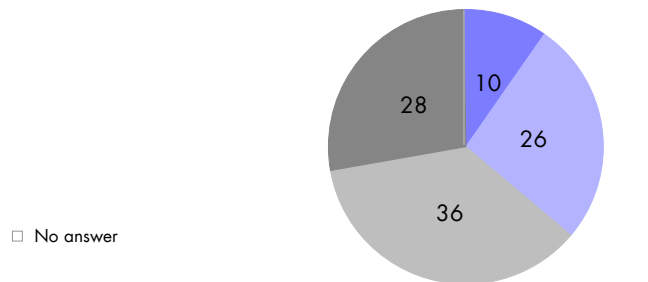
Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.3

Equity and retirement income

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: An adequate retirement income is available to people of all social and economic backgrounds in our country.



□ No answer

Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

Responsibility for providing for people in old age

Asked whose responsibility it is to provide for people in their old age when they are no longer able to work, Japanese opinion leaders reach no consensus. A plurality of Japanese opinion leaders (42%) say that the government should have primary responsibility, but others point to individual older people themselves (28%), family members (16%), or employers (6%).

Optimal mix of income from different groups

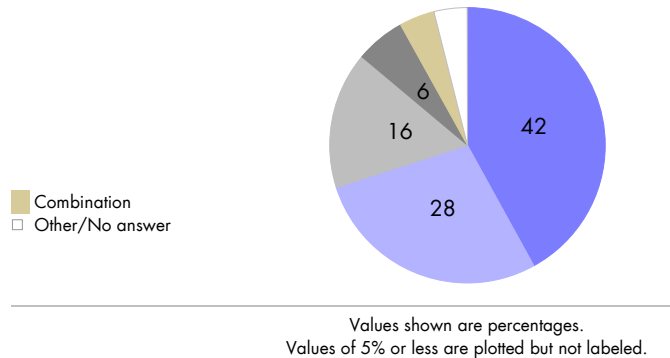
In addition to being asked about whose responsibility it is to provide for people in their old age, opinion leaders were asked to think about the optimal mix of income for people in their old age and what percent would come from different groups.

Consistent with the finding that a plurality of Japanese opinion leaders believe that the government should have primary responsibility for providing for older people, Japanese opinion leaders, on average, expect the biggest chunk of retirement income to come from the government. According to the average Japanese opinion leader, government should provide nearly half of older people's income (44% of income), with a significantly smaller share coming from older people's own savings (26% of income), employers (14% of income), family (9% of income), or the community (7% of income).

Figure 3.4

Primary responsibility for providing for people in their old age

► In your opinion, which of the following should have primary responsibility for providing for people in their old age: [●] government, [●] individual older people, [●] family, or [●] employers?

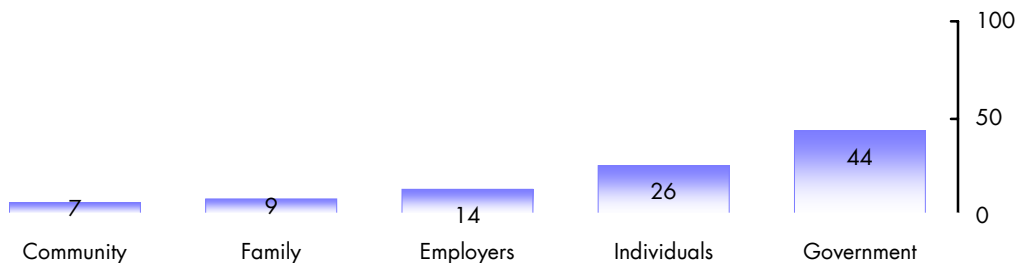


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.5

Optimal mix of income—average percent of responsibility assigned to each group

► If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following?



AARP, *Aging in Asia and Oceania*, March 2007.

Family role

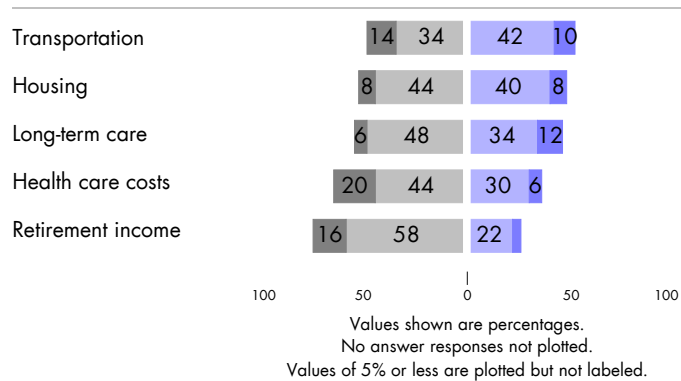
Although relatively few Japanese opinion leaders believe that family members should have primary responsibility for providing for older relatives, many Japanese opinion leaders nevertheless expect family to play a role in assisting older people in various ways. However, the degree to which family members should be involved divides Japanese opinion leaders. When it comes to providing transportation, housing, and long-term care in old age, Japanese opinion leaders are split into almost equally large groups, with one side calling for a moderate to large family role and the other side preferring a small role or no role at all. Eliciting more agreement, a solid majority of Japanese opinion leaders think that the family should only play a small role or no role at all in providing retirement income (74%) and covering health care costs (64%).

Although a majority of Japanese opinion leaders believe that living independently as long as possible is best for relatively healthy older people, many also advocate living with extended families. About six in 10 Japanese opinion leaders (58%) think that living independently is the best option. But nearly four in 10 Japanese opinion leaders (38%) suggest that living with extended family would be ideal. Few Japanese opinion leaders (4%) believe that living in assisted care facilities would be best and none of them express a preference for nursing homes.

Figure 3.6

Family role in assisting older people

► In your opinion, how big a role should family play in providing the following types of support to people in their old age? Should family play [●] a big role, [●] moderate role, [●] small role, or [●] no role at all in providing [INSERT]?

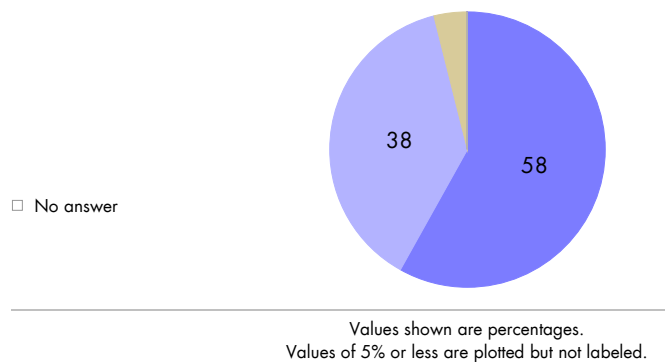


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.7

Living arrangements of older people

► In general, is it best for relatively healthy older people to [●] live independently as long as possible [●] live with extended families, [●] live in assisted care facilities, or [●] live in nursing homes?



AARP, *Aging in Asia and Oceania*, March 2007.

According to Japanese opinion leaders, technology will help older people live independently for a longer period of time. Eight in 10 Japanese opinion leaders (80%) believe that technology, such as computers and robots, will be at least helpful in extending independent living by older people in their country over the next 20 years. However, Japanese opinion leaders are much more likely to think that technology will be only somewhat, rather than very, helpful (60% versus 20%). In addition, two in 10 Japanese opinion leaders (20%) predict that technology will not be too helpful.

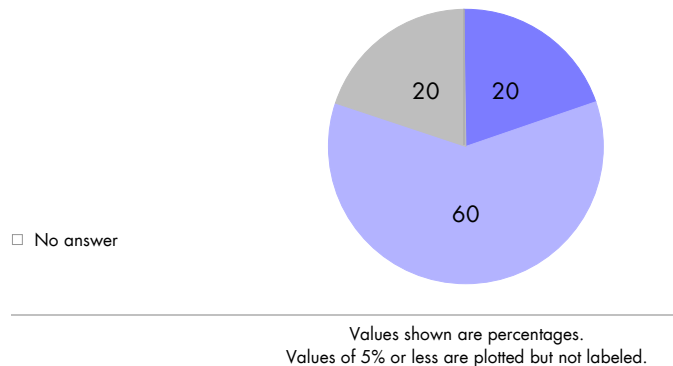
Health services

Providing health and medical care to an increasingly large elderly population is a challenge often associated with population aging and Japanese opinion leaders do not think that their current health care system is up to the challenge. More than seven in 10 Japanese opinion leaders (74%) somewhat or strongly agree that their country's health care system is not well prepared to deal with an aging population. At the same time, a quarter of Japanese opinion leaders (26%) disagree, saying that the health care system is well prepared.

Figure 3.8

Helpfulness of technology in extending independent living

► How helpful do you think technology, such as computers and robots will be in extending independent living by older people in our country over the next 20 years—[●] very helpful, [●] somewhat helpful, [●] not too helpful, or [●] not helpful at all?

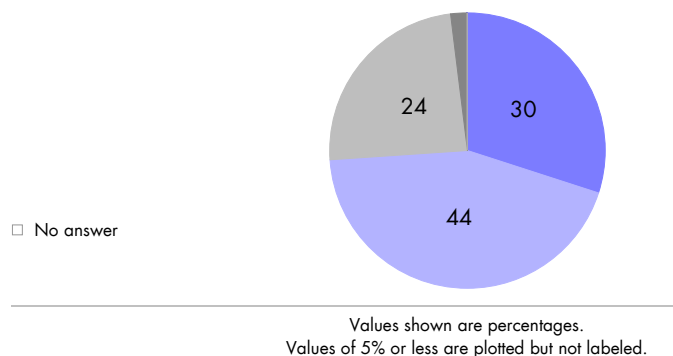


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.9

Preparedness of health care system

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Our health care system is not well prepared to deal with an aging population.



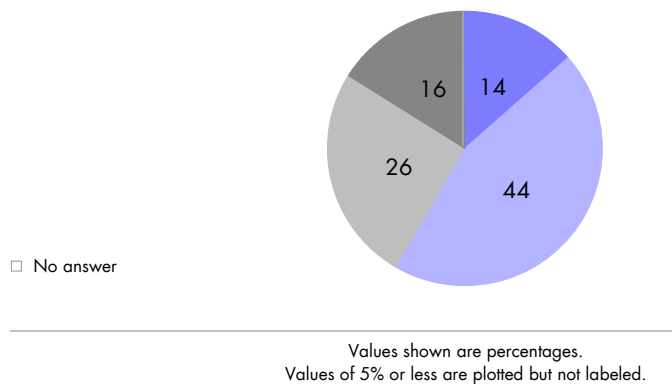
AARP, *Aging in Asia and Oceania*, March 2007.

Despite concerns about their health care systems' capacity to deal with an aging population, many Japanese opinion leaders indicate that health care delivery in their country is currently fairly equitable. Asked whether access to quality health care is currently available to older people of all social and economic backgrounds in Japan, about six in 10 Japanese opinion leaders (58%) say that the answer is yes, although most only somewhat agree. A sizable minority of Japanese opinion leaders (42%) disagree, implying that older people of certain socioeconomic backgrounds lack access to quality health care.

Japanese opinion leaders are supportive of increased government efforts to improve delivery of health services to older people, with more than eight in 10 (84%) indicating that at least a moderate increase in efforts is called for. Half of Japanese opinion leaders (50%) believe that their government should increase its efforts a great deal, and an additional third (34%) say that efforts should be increased moderately to ensure that older people receive the health services they need. Only fourteen percent of Japanese opinion leaders think that the Japanese government should only increase its efforts in this area a little or not at all.

Figure 3.10
Equity and quality health care

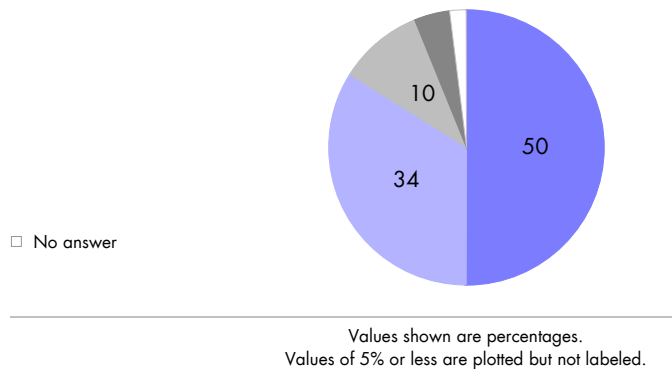
► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Access to quality health care is available to older people of all social and economic backgrounds in our country.



AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.11
Increasing government efforts to ensure older people receive health services

► Do you think our government should increase its efforts to ensure that older people receive the health services they need [●] a great deal, [●] moderately, [●] a little, or [●] not at all?



AARP, *Aging in Asia and Oceania*, March 2007.

In addition to government efforts, opinion leaders in Japan are hopeful that technology will help improve the health and medical care of older people. About eight in 10 Japanese opinion leaders (82%) believe that technology, such as computers and robots, will be helpful in improving the health and medical care of older people in their country over the next 20 years. However, Japanese opinion leaders are more likely to think that technology will only be somewhat helpful than they are to think that it will be very helpful (50% versus 32%). About two in 10 Japanese opinion leaders (18%) express even more pessimism, saying that technology will not be too helpful or that it will not be helpful at all in improving health and medical care.

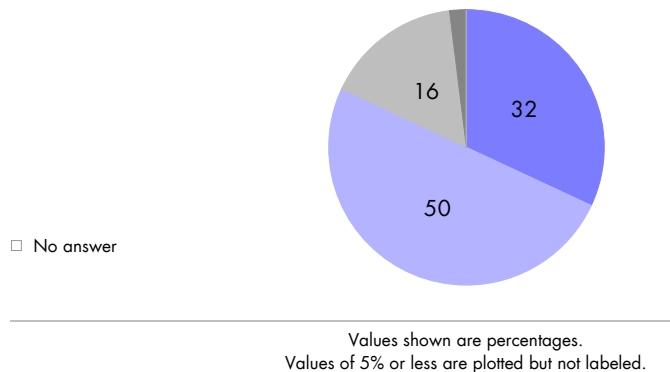
Housing

Perceptions of the housing situation divided Japanese opinion leaders into two camps. On one side, half of Japanese opinion leaders (50%) somewhat or strongly agree with the statement “adequate housing is available to older people of all social and economic backgrounds in our country.” But as many Japanese opinion leaders (50%) disagree with the statement, implying that at least some older Japanese reside in inadequate living quarters.

Figure 3.12

Helpfulness of technology in improving health and medical care of older people

► How helpful do you think technology, such as computers and robots will be in improving health and medical care of older people in our country over the next 20 years- [●] very helpful, [●] somewhat helpful, [●] not too helpful, or [●] not helpful at all?

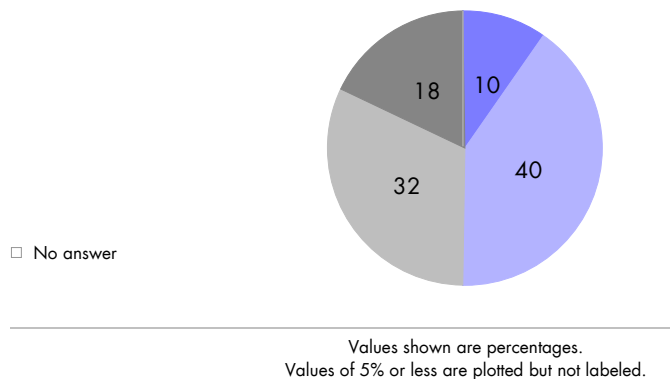


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.13

Equity and housing

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Adequate housing is available to older people of all social and economic backgrounds in our country.



AARP, *Aging in Asia and Oceania*, March 2007.

Despite the mixed evaluation of the current housing situation, Japanese opinion leaders are generally supportive of increased government efforts in the housing field. More than seven in 10 Japanese opinion leaders (76%) contend that their government should increase its efforts a great deal or moderately to ensure that older people have access to adequate housing. At the same time, roughly a quarter of Japanese opinion leaders (22%) believe that this level of effort is not necessary, calling for only a small increase in efforts or no increase at all.

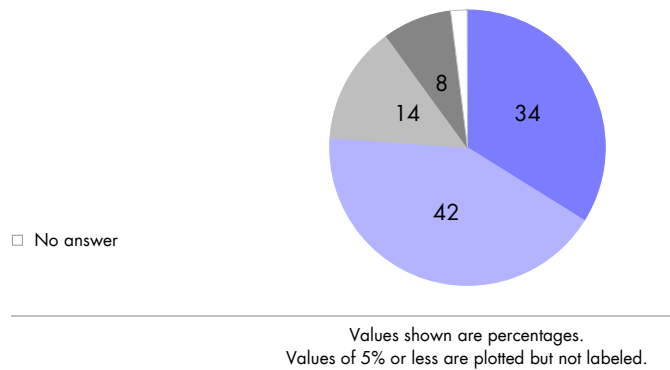
Policy changes to help cover costs related to aging

As more people reach retirement age, the costs for providing for this growing number of older people will increase. When it comes to potential policy changes to help cover these increased costs, the reaction of Japanese opinion leaders is mixed at best. A modest majority of Japanese opinion leaders support a moderate to large increase in taxes (56%) and the age of eligibility for pensions (54%). But sizable minorities believe that these policy tools should only be employed to a small extent or not at all. The response to potential pension reductions is also mixed, with a slim majority (56%) indicating that pensions should not be reduced more than a little. Moreover, unlike most other countries surveyed, a majority of Japanese opinion leaders shun the idea of significant mandatory private savings (66%) or public education campaigns emphasizing the importance of savings (70%). While at first glance this reluctance to educate people may seem surprising, it makes sense considering the fact that the Japanese already save a larger share of their disposable income than people in most other countries. Of the 8 countries surveyed, Japan is the only one with a majority of opinion leaders saying savings education is not needed.

Figure 3.14

Increasing government efforts to ensure older people have access to adequate housing

► Do you think our government should increase its efforts to ensure that older people have access to adequate housing [●] a great deal, [●] moderately, [●] a little, or [●] not at all?

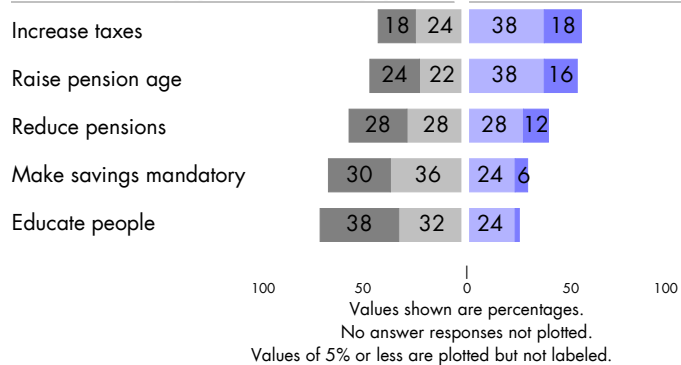


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.15

Support for policy changes

► As more people age and stop working, the costs for providing for this growing number of older people will increase. To what extent should [INSERT] to help cover these increased costs—[●] great extent, [●] moderate extent, [●] small extent, or [●] not at all?



AARP, *Aging in Asia and Oceania*, March 2007.

Society's commitment to older people

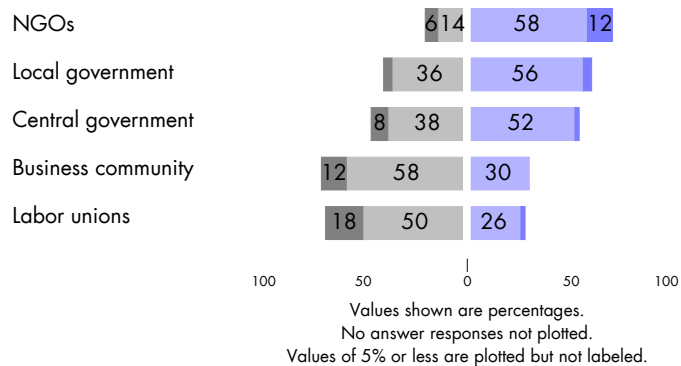
Japanese opinion leaders have somewhat mixed views about how committed different groups and institutions are to improving older people's quality of life, with nongovernmental organizations being the group seen as committed by the largest majority. Seven in 10 Japanese opinion leaders (70%) think that nongovernmental organizations are very or somewhat committed to bettering the lives of older people. More than half of Japanese opinion leaders also think that local governments (60%) and the central Japanese government (54%) are committed to older people, although sizable minorities disagree. As for the business community and labor unions, a solid majority do not consider them too committed or do not consider them to be committed at all to improving the quality of life for older people (business community 70%, labor unions 68%).

A majority of Japanese opinion leaders are pessimistic about the long-term future of older people in their country. About two thirds of Japanese opinion leaders (64%) believe that 20 years from now the overall quality of life of older people will have gotten somewhat or much worse. At the same time, three in 10 Japanese opinion leaders (30%) present a more optimistic point of view, predicting that things will get at least somewhat better.

Figure 3.16

Commitment to improving quality of life for older people

► Is/Are [INSERT] [●] very committed, [●] somewhat committed, [●] not too committed, or [●] not committed at all to improving the quality of life for older people?

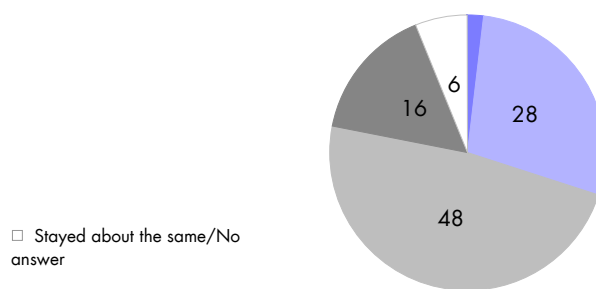


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 3.17

Quality of life in the future

► And 20 years from now, do you think the overall quality of life of older people in our country will have gotten [●] much better, [●] somewhat better, [●] somewhat worse, or [●] much worse?



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

Section 4: Perceptions of older people

To enjoy a good quality of life, not only do older people's physical needs have to be met, but their psychological well-being, including a sense of self-worth, is also important. The broader society's perceptions of older people arguably contribute to how they feel about themselves and their role in society. In this section, we discuss Japanese opinion leaders' perceptions of older people and their place in society.

28

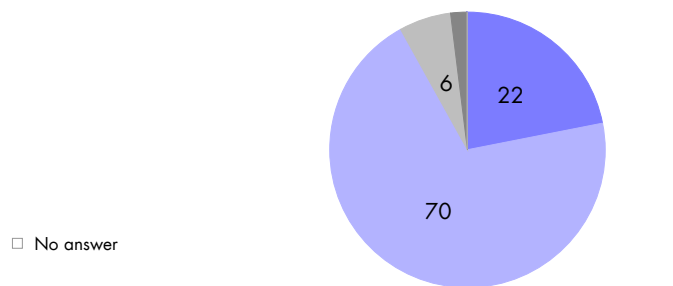
Contributing members of society

Almost all Japanese opinion leaders see older people as generally helpful, contributing members of society. About nine in 10 Japanese opinion leaders (92%) agree with this sentiment, although many more opinion leaders somewhat agree than strongly agree (70% versus 22%). Only about one in 10 Japanese opinion leaders (8%) disagree.

Figure 4.1

Contributing members of society

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Older people in our country are generally helpful, contributing members of society.



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

Older people are a contributing force that could be tapped into even more, according to Japanese opinion leaders. Most Japanese opinion leaders (88%) agree that their government should do more to take advantage of the contributions that older people can make to the community by enlisting them to help with community projects, and a majority feel this way strongly. Only one in 10 Japanese opinion leaders (10%) disagree that the government should do more to take advantage of the contributions older people can make.

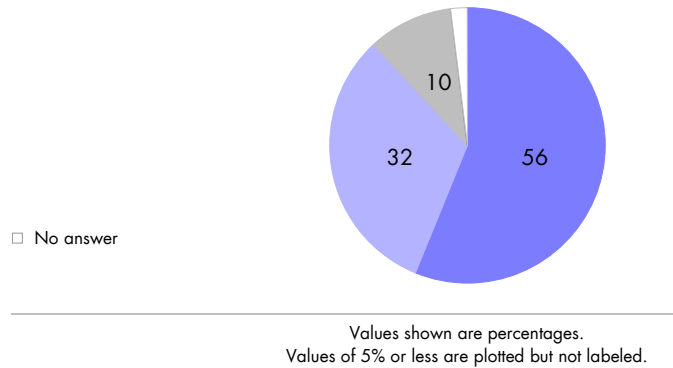
Potential pool of productive workers

Despite the perception of older people as contributing members of society, opinions are divided when it comes to businesses seeing the potential in older workers. According to a slim majority of Japanese opinion leaders (52%), the Japanese business community does view older people as a source of potential productive workers. But nearly as many Japanese opinion leaders (46%) disagree.

Figure 4.2

Help with community projects

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Our government should do more to take advantage of the contributions that older people can make to the community by enlisting them to help with community projects.

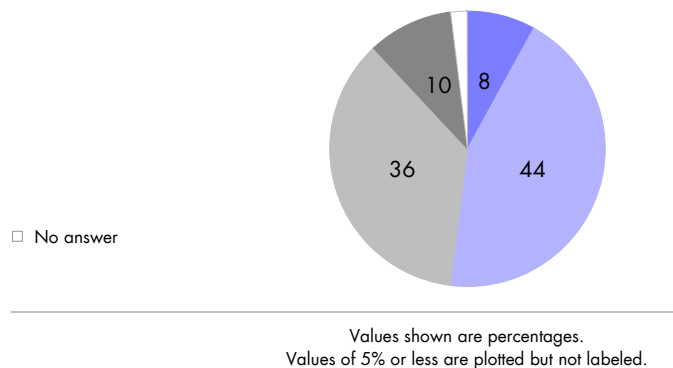


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 4.3

Potential productive workers

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: The business community views older people as a source of potential productive workers.



AARP, *Aging in Asia and Oceania*, March 2007.

Marketing products

Although many doubt that businesses see older people as potential workers, Japanese opinion leaders are rather united in stating that businesses do see older people as consumers. About nine in 10 Japanese opinion leaders (92%) at least somewhat agree that the business community in Japan views older people as an opportunity for marketing and selling products and services. Only six percent of Japanese opinion leaders disagree.

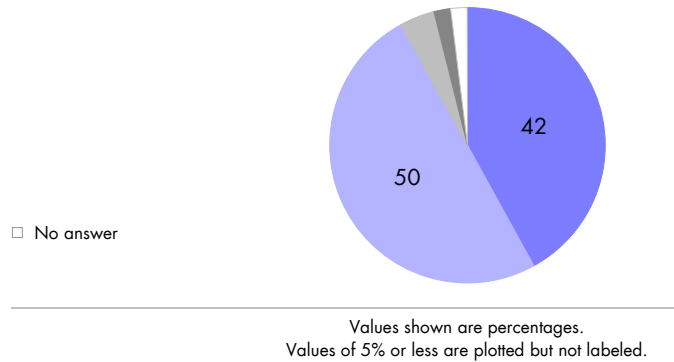
Burden on the community

Most Japanese opinion leaders also shun the notion that older people could be seen as a burden. About eight in 10 Japanese opinion leaders (82%) reject the statement “older people are often a burden on the community,” and many feel this way strongly. Only about two in 10 Japanese opinion leaders (18%) agree with the statement, saying that older people are often a burden.

Figure 4.4

Market for products and services

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: The business community views older people as an opportunity for marketing and selling products and services.

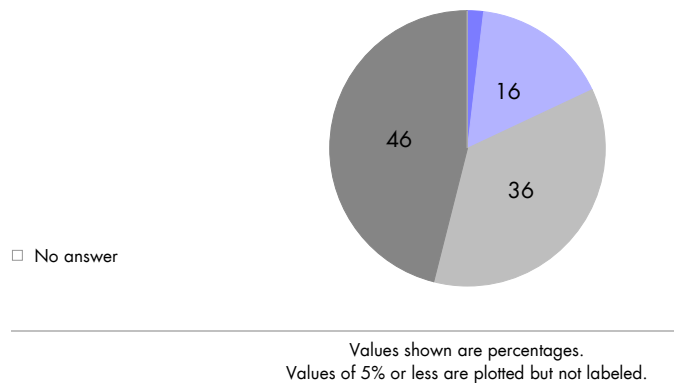


AARP, *Aging in Asia and Oceania*, March 2007.

Figure 4.5

Burden on the community

► Do you [●] strongly agree, [●] somewhat agree, [●] somewhat disagree, or [●] strongly disagree with the following statement: Older people are often a burden on the community.



AARP, *Aging in Asia and Oceania*, March 2007.

Section 5: Aging advocacy organizations

Despite decades of sound economic development and a democratic tradition, Japan is not home to as many nongovernmental organizations as most western countries. In this section, we discuss Japanese opinion leaders' awareness and opinions of organizations that advocate on behalf of older people as well as their familiarity with and perception of AARP. It should be noted that AARP was identified as commissioning the survey when opinion leaders were invited to participate, which could have influenced the results to questions having to do with AARP.

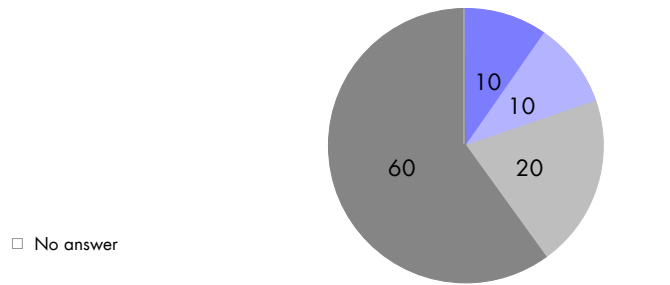
Perceptions of AARP

A majority of Japanese opinion leaders are not familiar with AARP. Six in 10 Japanese opinion leaders (60%) say that they are not familiar at all with AARP, and an additional two in 10 (20%) say that they are not too familiar with the organization. Only two in 10 Japanese opinion leaders (20%) describe themselves as somewhat or very familiar with AARP.

Figure 5.1

Familiarity with AARP

► How familiar are you with the US organization called AARP, formerly known as the American Association of Retired Persons—[●] very familiar, [●] somewhat familiar, [●] not too familiar, or [●] not familiar at all?



□ No answer

Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

Among Japanese opinion leaders who do have some degree of familiarity with AARP, the impression of the organization is generally favorable or neutral. A solid majority of these opinion leaders (70%) say that their impression of AARP is very or somewhat favorable. And although about a third of these opinion leaders (30%) decline to answer the question, none of the opinion leaders say that they have an unfavorable attitude toward AARP.

Helpfulness of organizations like AARP

Most Japanese opinion leaders would welcome an organization like AARP in their country.¹⁸ About nine in 10 Japanese opinion leaders (92%) say that if an organization like AARP were established in their country, it would be very or somewhat helpful to older people. Only a handful of Japanese opinion leaders (6%) say that such an organization would not be too helpful or would not be helpful at all.

Figure 5.2

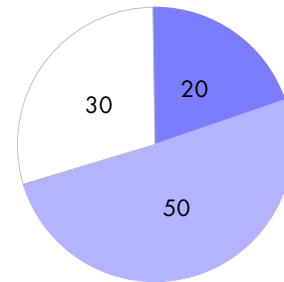
Impression of AARP

► What is your overall impression of AARP—[●] very favorable, [●] somewhat favorable, [●] not very favorable, or [●] not favorable at all?¹⁷

All opinion leaders with some degree of familiarity with AARP

CAUTION: Small base of respondents

□ No answer



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

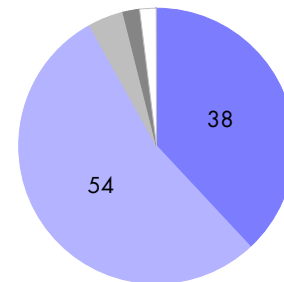
AARP, *Aging in Asia and Oceania*, March 2007.

Figure 5.3

Helpfulness of organizations like AARP

► If an organization like AARP were established in our country, how helpful would this be to older people—[●] very helpful, [●] somewhat helpful, [●] not too helpful, or [●] not helpful at all?

□ No answer



Values shown are percentages.
Values of 5% or less are plotted but not labeled.

AARP, *Aging in Asia and Oceania*, March 2007.

¹⁷ These results are based on 20 respondents.

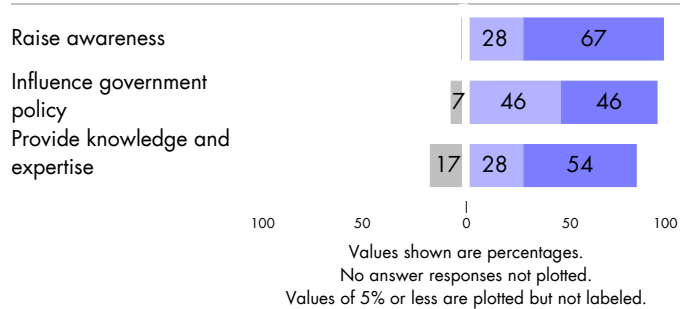
¹⁸ Prior to being asked this question, opinion leaders were read the following text: "AARP is a not-for-profit organization that works to improve the quality of life of older people who are age 50 or older. The organization works with the US central government, local governments, and businesses to be sure that older people have what they need for their health, finances, and jobs. It also offers education programs, travel discounts, and social opportunities for the older people who join. To join AARP, older people pay approximately \$12 a year, which is a low fee in the US."

Japanese opinion leaders would like to see an organization like AARP in Japan first and foremost because it would raise awareness about aging. Asked about different reasons why an AARP-style organization would be helpful, most of these opinion leaders characterize all three reasons asked about as at least moderate reasons—raising awareness about aging (95%), influencing government policy (92%), and providing knowledge and expertise (82%)—two thirds (67%) say that raising awareness is a big reason. A slim majority (54%) say the same about the provision of knowledge and expertise by the organization.

Figure 5.4

Reasons an organization like AARP would be helpful

► Why do you think the organization would be helpful? Is [INSERT] [●] a big reason, [●] moderate reason, [●] small reason, or [●] not a reason at all?¹⁹



AARP, *Aging in Asia and Oceania*, March 2007.

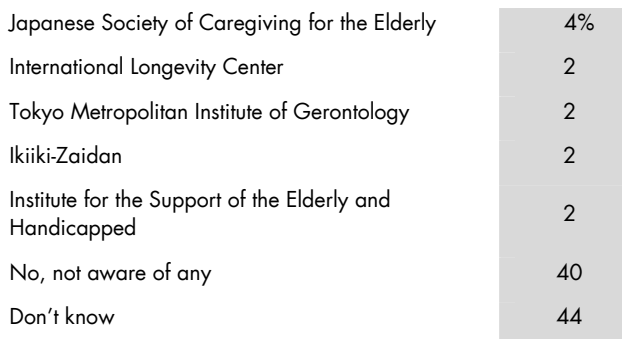
Local organizations advocating for older people

Most Japanese opinion leaders are unable to name a local organization that works to improve the quality of life of older people and serves as an information source on aging, saying either that they do not know if any such organizations exist in Japan (44%) or that they are not aware of any such organizations (40%). A few Japanese opinion leaders do bring up a variety of organizations, such as the Japanese Society of Caregiving for the Elderly (4%), the International Longevity Center (2%), Tokyo Metropolitan Institute of Gerontology (2%), Ikiiki-Zaidan (2%), or the Institute for the Support of the Elderly and Handicapped (2%).

Figure 5.5

Local organizations

► Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?



AARP, *Aging in Asia and Oceania*, March 2007.

¹⁹ These results are based on 46 respondents.

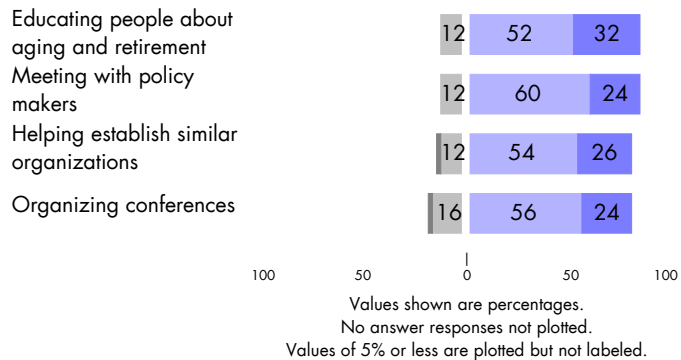
AARP role abroad

Consistent with the findings in other countries, Japanese opinion leaders generally think that AARP involvement in promoting the interests of older people outside the US would be helpful. Eight in 10 or more Japanese opinion leaders think that engaging in public education on issues related to aging and retirement (84%), meeting with government policy makers to exchange information about aging and retirement (84%), helping establish AARP-style organizations in other countries (80%), and organizing conferences to bring together policy makers and aging experts from various countries (80%) would be helpful. However, a larger share of opinion leaders think that engaging in these activities would be only somewhat helpful rather than very helpful.

Figure 5.6

AARP role abroad

► If AARP were to play a role in promoting the interests of older people in countries other than the United States, how helpful would the following activities be? Would [INSERT] be [●] very helpful, [●] somewhat helpful, [●] not too helpful, or [●] not helpful at all?



AARP, *Aging in Asia and Oceania*, March 2007.

Methodology

In 2006 AARP commissioned Princeton Survey Research Associates International (PSRAI) to conduct a survey of opinion leaders in the United States and in seven countries in Asia and Oceania. The survey was designed to increase AARP's knowledge of aging issues and attitudes in key Asian markets and to compare attitudes and policies towards aging in the US to attitudes and policies in Asian and Oceania societies. PSRAI teamed up with local research firms to conduct interviews in Australia, China, India, Japan, New Zealand, Singapore, South Korea, and the US. Between October and December 2006, interviewers spoke with more than 400 individuals who hold senior level positions in government, nongovernmental organizations, private sector, media, and academia. Below we discuss details of the survey methodology, including the sample sizes, sample selection, recruitment, questionnaire design, and fieldwork logistics.

Sample sizes

A minimum of 50 interviews were conducted in each of the survey countries, for a total of 423 interviews. For the full sample, the margin of error is ± 5 percentage points. Margins of error for individual country samples are displayed in the table on the right.

The survey sample consists of opinion leaders from the following five categories: (1) government, (2) nongovernmental organizations, (3) private sector, (4) media, and (5) academia. The sample was equally divided among the five professional sectors, with a goal of interviewing 10 opinion leaders per sector in each country. The table below outlines the definitions that were used to classify opinion leaders.

Figure 6.1

Country sample sizes

	Number of interviews	Margin of error
Australia	50	14
China	50	14
India	50	14
Japan	50	14
New Zealand	49	14
Singapore	50	14
South Korea	50	14
United States	74	11
Total	423	5

Figure 6.2

Eligibility criteria

Category	Eligible organizations	Eligible individuals
Government	Departments and agencies that deal with finance, economics, taxing, pensions/retirement, labor/employment, social services/welfare, social affairs, or social security (e.g. Ministries of Health, Social Development, Social Security, Labor, Finance)	Senior Civil Servant level and above (typically Director or Director General level)
	Parliamentarians or politicians, where applicable	Parliamentarians or senior staff of relevant committees, such as aging, health, social security, finance, or retirement
Non-governmental organizations	Both local and multinational nongovernmental, nonprofit, religious, charitable, and/or advocacy organizations, foundations, and movements whose mission is related to public policy, economic affairs, social affairs, health care and disabilities, aging, or the labor force	Heads of or senior staff of nongovernmental organizations
Private Sector	Reputable private sector firms and business associations (e.g. chambers of commerce)	Senior business leaders, consultants, or business experts who are known for their expertise on economic and social issues and executives with responsibility for insurance, retirement, human resources, or employee/labor force policy
Media	An organization that derives its business from media driven activities including both publicly and privately funded radio, television, press, and the Internet	Producers, editors, or journalists who report on social, economic, and/or political issues
Academia	Any university, college, or think tank	Professors within relevant departments, such as Social Sciences, Economics, Public Health, Demographics, Public Policy, and Political Science
		Heads of, or senior staff of, relevant think tanks or institutions

The survey results were weighted to approximate the original sampling plan and to ensure that no countries or professional sectors are over- or underrepresented in the final analysis and that there was equal representation from all countries and professional sectors included in the survey.

Sample selection

Names of potential respondents were compiled from two sources. PSRAI and individual survey research firms in each country used publicly available material for each of the sectors mentioned above to compile lists of opinion leaders. From these lists, PSRAI randomly selected opinion leaders to be contacted for the survey.

Recruiting opinion leaders

The randomly chosen opinion leaders were sent letters inviting them to participate in the survey and explaining the purpose of the survey. These letters consisted of two components: (1) a letter written by the local firm inviting participation and providing contact information and (2) a letter from AARP’s Director of International Affairs that explained the purpose of the survey. To protect the respondents’ privacy, the letters from AARP did not identify the respondents by name. The letters were emailed, faxed, mailed, or hand-delivered to the respondents depending on what was determined to be the most reliable and time-efficient method in the particular country.

Each respondent was contacted at least five times before replacing the respondent with another name from the sample. Only conversations with an actual person counted as contacts. If the respondent clearly refused to participate, he or she was replaced with the next person on the list of randomly selected names. Response rates to the survey were typical of opinion leader surveys, ranging from about 20 percent to more than 60 percent. Detailed disposition of all contacts is available upon request.

As the table on the right shows, the survey respondents represent a range of demographic backgrounds. Age-wise, the respondents can be divided into three equal size groups—40 years of age or younger (30%), 41 to 50 years (30%), 51 to 60 years (30%)—and a smaller contingent of opinion leaders over 60 years of age (8%). About three quarters of the respondents are men (74%), a quarter women (26%).

In Japan, a majority of the respondents (60%) are over age 50. Most of the respondents (90%) are male, with only one in 10 (10%) female respondents.

Questionnaire design and translations

The questionnaire was designed by PSRAI in consultation with AARP. The format for the questionnaire was mostly close-ended, although a few open-end questions were also included. Coding frames for the open-end questions were developed and data for the open-end questions coded at PSRAI.

PSRAI gave most respondents the opportunity to take the survey in the language of their choice. As is standard PSRAI practice for international work, we employed independent translators to translate the questionnaires back to English to ensure the meaning of the translations closely mirrored the original English questionnaire.

Fieldwork logistics

To accommodate the respondents' busy schedules, multiple modes of interviewing were offered. More than half of the respondents were interviewed on the phone, while about a quarter were interviewed face-to-face.

The rest responded to the survey questions online or filled out the questionnaire on paper. The interviews were completed between October and December 2006. PSRAI's

Figure 6.3

Respondent demographics

ALL COUNTRIES

Age	
40 or less	30%
41 to 50	30
51 to 60	30
Over 60	8
Sex	
Male	74%
Female	26

JAPAN

Age	
40 or less	20
41 to 50	16
51 to 60	36
Over 60	24
Sex	
Male	90
Female	10

Figure 6.4

Survey languages

Australia	English
China	Mandarin, Cantonese
India	English
Japan	Japanese
New Zealand	English
Singapore	English
South Korea	Korean
United States	English

Figure 6.5

Interview mode

Phone	56%
Face-to-face	27
Paper and pencil	11
Online	7

partner firms in each country, the field dates, and the mode of interview are displayed in the following table.

Figure 6.6

Fieldwork logistics

	Local company conducting the interviews	Interviewing dates	Mode of interview
Australia	TNS Australia	11/08-12/15/2006	Phone
China	Horizonkey	11/03-11/17/2006	Phone, paper and pencil
India	TNS India	11/15-12/18/2006	Face-to-face, phone, paper and pencil
Japan	Lyncs	10/31-11/27/2006	Phone
New Zealand	TNS Australia	11/13-12/19/2006	Phone
Singapore	TNS Singapore	10/31-12/01/2006	Face-to-face, phone
South Korea	Gallup Korea	11/02-12/07/2006	Face-to-face, paper and pencil
United States	Princeton Data Source	10/31-12/11/2006	Phone, online

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PSRAI expects its partner research firms to maintain the highest ethical standards. Nearly all of our partner firms are members of their regional survey research professional association, which also seeks to hold its members to the highest ethical standards.

Only skilled interviewers who have experience interviewing opinion leaders were employed in this study. In developing countries, many of our partner survey firms have their executives conduct high-level interviews, as this is often the only means to get an appointment with a high-level government official. In other countries, the firms employ specially trained, well-educated elite interviewers.

Before an interviewer is certified to conduct an interview, the survey firms conduct final mock interviews with the interviewer to verify that the person is fully prepared to conduct the survey. It is also common procedure in survey research to conduct a certain number of back-checks (normally 20 to 50 percent of interviews) to verify that the interviewer conducted the survey correctly.

Appendix: Annotated questionnaire

Annotated questionnaire

AARP Opinion Leader Survey in Asia and Oceania

Country	Sample Size	Field Dates
Australia:	n = 50	11.08.2006-12.15.2006
China:	n = 50	11.03.2006-11.17.2006
India:	n = 50	11.15.2006-12.18.2006
Japan:	n = 50	10.31.2006-11.27.2006
New Zealand	n = 49	11.13.2006-12.19.2006
Singapore:	n = 50	10.31.2006-12.01.2006
South Korea:	n = 50	11.02.2006-12.07.2006
United States:	n = 74	11.13.2006-12.11.2006

Margin of error is + or - 5 percentage points based on the full sample, + or - 11 points based on the US sample, and + or - 14 points based on the rest of the country samples.

Q1. In your opinion, what are the most important economic challenges facing our country in the next 20 years?²⁰

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Growing population of older people/aging of the population	40%	48%	38%	6%	34%	45%	66%	60%	25%
	Low birth rate	10%	-	-	-	36%	-	6%	38%	-
	Income inequality/gap between rich and poor	15%	-	10%	28%	10%	-	12%	48%	11%
	Increasing poverty	5%	-	2%	21%	-	4%	-	12%	4%
	Meeting basic needs, social welfare	13%	56%	10%	13%	2%	10%	8%	-	2%
	Health care spending/costs	12%	20%	2%	9%	8%	10%	2%	4%	40%
	Health problems/disease	3%	2%	-	12%	4%	-	-	2%	1%
	Paying for pensions, retirement income	10%	6%	2%	4%	18%	4%	6%	10%	27%
	Education	7%	4%	2%	11%	2%	4%	4%	16%	14%
	Slow economic growth/development	15%	20%	16%	10%	16%	16%	12%	24%	4%
	Unemployment, lack of jobs	16%	2%	8%	35%	4%	6%	16%	50%	6%
	Jobs going to other countries	5%	6%	2%	9%	2%	8%	6%	4%	6%
	Labor shortages	12%	16%	12%	14%	6%	32%	6%	-	8%
	Problems with government, policies, corruption, reform	9%	4%	34%	12%	4%	4%	2%	8%	1%
	Funding government spending, deficits, debt	5%	-	-	4%	2%	2%	-	2%	28%
	Meeting energy needs	10%	26%	24%	2%	6%	16%	-	-	7%
	Environmental issues	6%	10%	22%	2%	2%	8%	-	2%	5%
	Global competition, globalization	9%	-	6%	-	4%	15%	38%	-	12%
	Agricultural problems	5%	12%	-	12%	2%	6%	-	8%	1%
	Demographic issues (Overpopulation, immigration, emigration)	6%	4%	4%	13%	2%	12%	4%	-	5%
	Problems with business environment, business practices	6%	2%	22%	8%	2%	2%	10%	-	4%
	Labor issues	2%	-	2%	-	2%	2%	10%	-	1%
	Terrorism, civil strife, security, war, international relations	5%	16%	4%	2%	6%	2%	4%	4%	2%
	Inflation, high cost of living	2%	2%	4%	4%	-	-	4%	-	1%
	Other	8%	2%	8%	7%	4%	6%	8%	-	23%
	Don't know	1%	-	2%	-	2%	2%	2%	-	1%
	Refused	*	2%	-	-	-	-	-	-	-

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²⁰ In a notification letter to respondents, AARP was identified as a sponsor of the survey.

Q2. The populations of many countries are growing older as life expectancy increases and birth rates decline. Do you think the aging of the population will have a largely positive, largely negative, or both a positive and negative impact on our country over the next 20 years?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Positive impact	6%	4%	-	17%	10%	10%	4%	2%	5%
	Negative impact	35%	28%	40%	24%	36%	20%	38%	70%	25%
	Both positive and negative impact	54%	66%	52%	50%	52%	69%	54%	28%	64%
	No impact (Volunteered)	3%	2%	8%	9%	2%	-	2%	-	-
	Don't know	1%	-	-	-	-	-	2%	-	4%
	Refused	*	-	-	-	-	-	-	-	1%

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Q3. In what ways will the aging of the population have a positive impact on our country or provide new opportunities over the next 20 years?

Based on respondents who think the aging population will have a positive, negative or both a positive and negative impact

Based on multiple mentions		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	406	49	46	45	49	49	48	50	70
	WEIGHTED BASE	385	49	46	45	49	50	48	50	47
	Knowledge and experience of older people	50%	61%	22%	59%	41%	65%	54%	56%	43%
	Market for products and services	29%	22%	37%	13%	12%	43%	40%	46%	14%
	Potential pool of productive workers	21%	20%	17%	8%	12%	24%	29%	20%	38%
	Increased diversity	21%	55%	9%	7%	8%	39%	15%	28%	2%
	Assisting younger family members by providing child care	8%	4%	2%	11%	-	19%	15%	12%	2%
	Older workforce with beneficial qualities (e.g. skills, expertise)	2%	-	-	-	-	-	8%	-	8%
	Better health and medical care, longer lives	6%	4%	2%	4%	6%	-	10%	2%	20%
	More opportunities available for younger people	5%	2%	20%	9%	-	-	-	-	11%
	Greater volunteerism/community service	2%	-	-	-	-	2%	4%	-	11%
	Increased demand will improve public and social services	2%	2%	9%	2%	-	-	2%	2%	-
	New ideas, innovation, and research to deal with the issue	2%	-	2%	-	-	-	2%	-	9%
	Environmental benefits (slower population growth, less consumption)	2%	-	7%	-	4%	-	2%	-	2%
	Intergenerational interaction	1%	-	-	-	-	-	4%	-	5%
	Older people have stabilizing influence	1%	-	2%	-	-	-	6%	-	3%
	Economic benefits	2%	-	2%	-	6%	-	2%	-	5%
	None	2%	-	-	-	10%	2%	-	-	-
	Other	6%	4%	13%	6%	6%	2%	6%	2%	11%
	Don't know	8%	20%	20%	8%	-	12%	2%	4%	1%
	Refused	*	-	-	-	-	-	-	2%	-

Q4. How will the aging of the population in our country have a negative impact or pose new challenges over the next 20 years?

Based on respondents who think the aging population will have a positive, negative or both a positive and negative impact

Based on multiple mentions		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	406	49	46	45	49	49	48	50	70
	WEIGHTED BASE	385	49	46	45	49	50	48	50	47
	Increased cost of providing health care	60%	86%	30%	44%	18%	88%	69%	74%	66%
	Increased cost of providing pension/retirement income	55%	78%	70%	30%	43%	68%	25%	78%	49%
	Providing housing and other basic accommodations for older people	16%	29%	22%	4%	2%	8%	15%	38%	6%
	People may need to work longer than they would like before they can retire	14%	35%	4%	9%	8%	14%	15%	22%	4%
	Children having to take care of their parents	13%	4%	15%	11%	4%	8%	33%	20%	8%
	Greater fraction of population out of the workforce	13%	4%	35%	4%	10%	-	21%	10%	19%
	Increased need for accommodations for the physically disabled	7%	24%	-	4%	-	14%	10%	-	3%
	Economic problems	4%	-	9%	2%	10%	-	6%	2%	5%
	Increase in physical and mental health problems in the population	3%	-	4%	-	-	-	8%	-	15%
	Intergenerational conflicts, social instability	4%	2%	2%	-	8%	4%	8%	-	3%
	Adapting to an older workforce	3%	2%	2%	-	6%	-	10%	-	7%
	More old people with financial problems	4%	-	-	19%	-	-	13%	-	2%
	None	1%	-	-	-	4%	-	-	-	-
	Other	6%	2%	7%	4%	16%	4%	4%	-	9%
	Don't know	2%	-	4%	9%	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

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Q5. Compared to other issues facing our country, how important an issue is the aging of the population—very important, somewhat important, not very important, or not important at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very important	51%	38%	28%	48%	70%	30%	52%	80%	61%
	Somewhat important	41%	52%	58%	39%	20%	68%	42%	18%	34%
	Not very important	7%	8%	12%	13%	10%	2%	4%	2%	3%
	Not important at all	*	-	2%	-	-	-	-	-	1%
	Don't know	*	2%	-	-	-	-	2%	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q6. Overall, how prepared is our country to deal with potential changes that may result from the aging of the population—very prepared, somewhat prepared, not too prepared, or not prepared at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very prepared	4%	10%	-	2%	4%	-	12%	-	2%
	Somewhat prepared	32%	60%	4%	25%	18%	65%	52%	4%	29%
	Not too prepared	48%	20%	80%	25%	66%	27%	30%	74%	63%
	Not prepared at all	15%	10%	14%	46%	12%	8%	2%	22%	6%
	Don't know	1%	-	2%	2%	-	-	2%	-	-
	Refused	*	-	-	-	-	-	2%	-	-

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Q7a. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it: **the central/federal government.**²¹

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	5%	6%	-	-	12%	10%	4%	6%	-
	Right amount of attention	43%	48%	30%	22%	72%	43%	70%	46%	15%
	Too little attention	49%	46%	68%	76%	16%	47%	20%	44%	79%
	Don't know	2%	-	2%	2%	-	-	6%	4%	2%
	Refused	*	-	-	-	-	-	-	-	4%

Q7b. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it: **the business community.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	2%	-	2%	-	10%	2%	-	-	3%
	Right amount of attention	23%	14%	14%	14%	52%	18%	10%	36%	30%
	Too little attention	72%	86%	82%	80%	38%	80%	88%	62%	61%
	Don't know	2%	-	2%	6%	-	-	2%	2%	2%
	Refused	*	-	-	-	-	-	-	-	4%

²¹ Respondents in Australia and the US were asked about “the federal government.” Respondents in China, India, Japan, and South Korea were asked about “the central government.” Respondents in New Zealand were asked about “the government.” Respondents in Singapore were asked about “the Singapore government.”

Q7c. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it:
non-governmental groups.²²

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	6%	6%	2%	8%	20%	4%	2%	6%	-
	Right amount of attention	52%	72%	30%	55%	32%	69%	60%	58%	37%
	Too little attention	33%	14%	62%	29%	30%	11%	32%	34%	48%
	Don't know	10%	8%	6%	8%	18%	16%	6%	2%	12%
	Refused	*	-	-	-	-	-	-	-	3%

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Q7d. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it:
state/local governments.²³

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	324	50	50	50	50	-	-	50	74
	WEIGHTED BASE	300	50	50	50	50	-	-	50	50
	Too much attention	6%	-	2%	-	30%	-	-	4%	-
	Right amount of attention	23%	20%	12%	16%	42%	-	-	26%	19%
	Too little attention	67%	76%	82%	78%	26%	-	-	66%	75%
	Don't know	4%	4%	4%	6%	2%	-	-	4%	3%
	Refused	*	-	-	-	-	-	-	-	3%

Q7e. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it:
the media.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	9%	10%	10%	3%	22%	6%	4%	8%	8%
	Right amount of attention	42%	42%	36%	13%	44%	49%	48%	56%	44%
	Too little attention	46%	48%	50%	75%	32%	42%	46%	34%	41%
	Don't know	3%	-	4%	9%	2%	2%	2%	2%	4%
	Refused	*	-	-	-	-	-	-	-	3%

Q7f. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it:
the younger people of our country.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	*	-	-	-	-	-	-	-	1%
	Right amount of attention	12%	12%	6%	17%	18%	10%	12%	12%	6%
	Too little attention	85%	84%	94%	74%	82%	90%	86%	82%	88%
	Don't know	3%	4%	-	9%	-	-	2%	6%	2%
	Refused	*	-	-	-	-	-	-	-	3%

²² Respondents were given two or three examples of local groups.

²³ Respondents in Australia, India, and the US were asked about "state and local governments." Respondents in China, Japan, and South Korea were asked about "local government." This question was not asked in New Zealand or Singapore.

Q7g. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it: **the older people of our country.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	15%	6%	16%	17%	42%	6%	4%	16%	14%
	Right amount of attention	50%	64%	44%	29%	36%	70%	48%	64%	45%
	Too little attention	30%	24%	34%	43%	20%	24%	42%	18%	36%
	Don't know	4%	6%	6%	11%	2%	-	6%	2%	3%
	Refused	*	-	-	-	-	-	-	-	3%

47

Q7h. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it: **the health care community, including doctors and hospitals.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	9%	2%	10%	-	50%	-	-	4%	6%
	Right amount of attention	46%	60%	22%	19%	40%	70%	56%	60%	38%
	Too little attention	42%	34%	68%	75%	6%	30%	40%	32%	53%
	Don't know	3%	4%	-	6%	4%	-	4%	4%	1%
	Refused	*	-	-	-	-	-	-	-	3%

Q7i. In your opinion, have the following groups and institutions paid too much attention, about the right amount of attention, or too little attention to the aging of the population and the challenges and opportunities associated with it: **labor unions.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Too much attention	2%	-	4%	-	8%	2%	-	-	3%
	Right amount of attention	36%	28%	10%	12%	62%	51%	54%	38%	31%
	Too little attention	51%	50%	78%	69%	28%	35%	38%	60%	49%
	Don't know	11%	22%	8%	18%	2%	12%	8%	2%	14%
	Refused	*	-	-	-	-	-	-	-	3%

Q8a. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements: **Our government has the necessary knowledge and expertise to address issues related to the aging of the population.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	22%	46%	12%	22%	12%	37%	22%	-	24%
	Somewhat agree	44%	40%	30%	41%	56%	51%	56%	40%	41%
	Somewhat disagree	24%	10%	46%	18%	26%	6%	18%	44%	21%
	Strongly disagree	10%	4%	12%	17%	6%	6%	4%	14%	14%
	Don't know	*	-	-	2%	-	-	-	2%	-
	Refused	-	-	-	-	-	-	-	-	-

Q8b. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements:
The aging of the population should not be a priority; we have other, more pressing issues to address.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	6%	2%	6%	12%	16%	2%	4%	2%	4%
	Somewhat agree	17%	6%	32%	23%	22%	10%	16%	12%	11%
	Somewhat disagree	36%	24%	48%	35%	38%	44%	26%	42%	32%
	Strongly disagree	40%	68%	14%	30%	22%	43%	52%	42%	53%
	Don't know	1%	-	-	-	2%	-	2%	-	1%
	Refused	*	-	-	-	-	-	-	2%	-

48

Q8c. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements:
Our health care system is not well prepared to deal with an aging population.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	33%	22%	34%	63%	30%	18%	12%	30%	59%
	Somewhat agree	44%	62%	46%	24%	44%	53%	46%	50%	31%
	Somewhat disagree	17%	14%	14%	6%	24%	28%	32%	14%	8%
	Strongly disagree	4%	2%	4%	8%	2%	-	8%	6%	1%
	Don't know	*	-	2%	-	-	-	2%	-	-
	Refused	*	-	-	-	-	-	-	-	2%

Q8d. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements:
The aging of the population is an opportunity to create new roles for older people in our country.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	46%	68%	12%	42%	56%	56%	52%	12%	71%
	Somewhat agree	41%	30%	60%	39%	40%	40%	34%	56%	29%
	Somewhat disagree	9%	2%	22%	11%	4%	2%	12%	20%	-
	Strongly disagree	3%	-	4%	4%	-	-	2%	12%	-
	Don't know	1%	-	2%	4%	-	2%	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q9. In your opinion, at what age is a worker an "older" worker?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	40 to 49	3%	4%	2%	-	-	10%	2%	2%	1%
	50 to 54	13%	38%	4%	16%	-	14%	20%	10%	3%
	55 to 59	14%	24%	12%	10%	2%	12%	26%	18%	9%
	60 to 64	27%	18%	48%	36%	8%	27%	26%	40%	17%
	65 to 69	22%	6%	24%	13%	52%	22%	8%	18%	35%
	70 to 74	10%	4%	8%	8%	32%	2%	4%	6%	16%
	75 to 85	1%	-	-	3%	2%	-	-	-	3%
	Depends on mindset/attitude (Volunteered)	2%	2%	-	6%	-	4%	2%	2%	-
	Depends on physical health (Volunteered)	2%	2%	-	4%	-	2%	4%	-	6%
	Depends on occupation (Volunteered)	2%	-	2%	-	-	2%	4%	2%	4%
	Depends on something else (Volunteered)	2%	-	-	2%	2%	2%	4%	-	3%
	Combination of any of the above (Volunteered)	*	-	-	-	-	-	-	2%	1%
	Don't know	1%	2%	-	-	2%	2%	-	-	-
	Refused	1%	-	-	2%	-	-	-	-	3%

49

Q10a. In general, at what age do you think most male workers should retire or stop working?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	45 to 49	-	-	-	-	-	-	-	-	-
	50 to 54	*	-	-	-	-	-	2%	-	-
	55 to 59	2%	2%	4%	8%	-	-	2%	4%	-
	60	16%	8%	26%	22%	6%	6%	12%	44%	4%
	61 to 64	2%	-	4%	4%	4%	-	2%	-	2%
	65	35%	38%	46%	28%	50%	35%	38%	28%	20%
	66 to 69	3%	2%	2%	-	4%	2%	6%	-	9%
	70	13%	22%	6%	8%	18%	16%	8%	10%	18%
	71 to 74	*	-	-	-	-	-	-	-	1%
	75	2%	-	-	-	2%	2%	4%	-	5%
	76 to 85	*	-	-	-	-	-	-	-	1%
	Never/when die	4%	2%	-	2%	10%	6%	4%	4%	6%
	Depends on mindset/attitude (Volunteered)	8%	16%	-	7%	-	21%	6%	4%	7%
	Depends on physical health (Volunteered)	4%	2%	4%	12%	4%	4%	2%	-	3%
	Depends on occupation (Volunteered)	3%	2%	6%	2%	-	4%	4%	4%	3%
	Depends on something else (Volunteered)	*	-	-	-	-	-	2%	-	2%
	Combination of any of the above (Volunteered)	4%	6%	2%	-	2%	-	8%	2%	9%
	Don't know	3%	-	-	7%	-	4%	-	-	10%
	Refused	*	-	-	-	-	-	-	-	1%

Q10b. In general, at what age do you think most female workers should retire or stop working?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	45 to 49	*	-	2%	-	-	-	-	2%	-
	50 to 54	2%	-	2%	8%	2%	-	2%	4%	-
	55 to 59	8%	2%	34%	4%	2%	2%	2%	16%	-
	60	20%	10%	38%	23%	14%	18%	18%	34%	4%
	61 to 64	2%	-	4%	7%	-	-	4%	-	3%
	65	27%	38%	8%	25%	48%	31%	26%	24%	19%
	66 to 69	3%	-	-	2%	2%	2%	8%	-	9%
	70	9%	22%	4%	-	14%	6%	6%	6%	17%
	71 to 74	1%	-	-	-	-	-	2%	-	3%
	75	2%	-	-	2%	4%	2%	2%	-	4%
	76 to 85	*	-	-	-	-	-	-	-	2%
	Never/when die	4%	2%	-	2%	8%	6%	4%	4%	6%
	Depends on mindset/attitude (Volunteered)	7%	16%	-	4%	-	19%	8%	4%	7%
	Depends on physical health (Volunteered)	4%	2%	4%	12%	4%	4%	2%	-	5%
	Depends on occupation (Volunteered)	2%	2%	2%	2%	-	4%	4%	4%	2%
	Depends on something else (Volunteered)	1%	-	-	-	-	-	2%	-	3%
	Combination of any of the above (Volunteered)	4%	6%	2%	2%	2%	2%	10%	2%	7%
	Don't know	3%	-	-	9%	-	4%	-	-	10%
	Refused	*	-	-	-	-	-	-	-	1%

50

Q11. In some countries workers are required to retire at a particular age. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose the idea of a mandatory retirement age?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly support	7%	-	8%	29%	10%	2%	4%	2%	2%
	Somewhat support	22%	2%	42%	28%	34%	2%	18%	44%	4%
	Somewhat oppose	30%	12%	34%	24%	36%	23%	40%	38%	31%
	Strongly oppose	37%	82%	6%	10%	16%	73%	34%	12%	62%
	Support mandatory retirement for some occupations/It depends (Volunteered)	4%	4%	6%	9%	4%	-	4%	4%	1%
	Don't know	*	-	4%	-	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q12. And what should the mandatory retirement age be?

Based on respondents who either strongly support or somewhat support a mandatory retirement age

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	117	1	25	28	22	2	11	23	5
	WEIGHTED BASE	116	1	25	28	22	2	11	23	3
	50 to 59	10%	-	12%	25%	-	-	-	9%	-
	60	28%	-	32%	26%	9%	-	18%	57%	-
	61 to 64	6%	-	4%	15%	-	-	9%	4%	-
	65	41%	100%	44%	20%	77%	47%	45%	26%	35%
	66 to 70	8%	-	8%	-	14%	-	18%	4%	47%
	Don't know	5%	-	-	15%	-	53%	9%	-	-
Refused	*	-	-	-	-	-	-	-	18%	

51

Q13. In your opinion, how well prepared are employers [IF PRIVATE SECTOR: in your industry] for a future workforce comprised of more older workers—very well, somewhat well, not too well, or not well at all?²⁴

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	4%	4%	4%	6%	2%	8%	2%	-	4%
	Somewhat well	27%	48%	8%	31%	26%	47%	8%	16%	36%
	Not too well	47%	32%	42%	40%	62%	35%	60%	68%	41%
	Not well at all	19%	16%	46%	15%	10%	10%	28%	12%	14%
	Don't know	2%	-	-	6%	-	-	2%	4%	1%
	Refused	1%	-	-	2%	-	-	-	-	4%

Q14. To the best of your knowledge, is discrimination against older people a big problem, a moderate problem, a small problem, or not a problem at all when employers [IF PRIVATE SECTOR: in your industry] are recruiting and hiring employees?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Big problem	34%	22%	40%	38%	52%	12%	44%	36%	27%
	Moderate problem	40%	32%	34%	42%	34%	47%	42%	44%	44%
	Small problem	19%	44%	16%	4%	8%	39%	10%	14%	21%
	Not a problem	5%	-	10%	13%	6%	2%	2%	2%	8%
	Don't know	1%	2%	-	3%	-	-	2%	4%	-
	Refused	-	-	-	-	-	-	-	-	-

²⁴ Prior to being asked this question, all respondents were read the following: For the rest of this interview, when we ask about older workers we are referring to workers who are 50 years of age or older.

Q15a. Next, thinking about ways in which employers [IF PRIVATE SECTOR: in your industry] may accommodate older workers, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the following practices: **allowing older workers to work fewer hours?**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly support	44%	60%	22%	34%	48%	41%	60%	22%	67%
	Somewhat support	39%	34%	62%	32%	44%	39%	28%	46%	28%
	Somewhat oppose	12%	4%	10%	17%	6%	20%	6%	26%	3%
	Strongly oppose	2%	-	-	6%	2%	-	6%	4%	1%
	Don't know	2%	2%	6%	9%	-	-	-	2%	1%
	Refused	*	-	-	2%	-	-	-	-	-

52

Q15b. Thinking about ways in which employers [IF PRIVATE SECTOR: in your industry] may accommodate older workers, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the following practices: **providing opportunities for additional training and education?**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly support	55%	86%	20%	57%	60%	57%	54%	34%	72%
	Somewhat support	36%	14%	54%	28%	28%	41%	40%	56%	28%
	Somewhat oppose	6%	-	16%	10%	10%	2%	4%	8%	-
	Strongly oppose	1%	-	4%	2%	2%	-	2%	2%	-
	Don't know	1%	-	6%	2%	-	-	-	-	-
	Refused	*	-	-	2%	-	-	-	-	-

Q15c. Thinking about ways in which employers [IF PRIVATE SECTOR: in your industry] may accommodate older workers, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the following practices: **establishing and enforcing policies that prohibit discrimination based on age at the workplace?**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly support	58%	90%	32%	56%	50%	65%	58%	34%	79%
	Somewhat support	29%	10%	50%	26%	30%	29%	28%	46%	14%
	Somewhat oppose	9%	-	14%	10%	16%	2%	8%	16%	3%
	Strongly oppose	2%	-	2%	2%	-	4%	6%	2%	1%
	Don't know	1%	-	2%	2%	4%	-	-	2%	1%
	Refused	1%	-	-	4%	-	-	-	-	1%

Q15d. Thinking about ways in which employers [IF PRIVATE SECTOR: in your industry] may accommodate older workers, do you strongly support, somewhat support, somewhat oppose, or strongly oppose the following practices: **offering older workers a different position with fewer responsibilities?**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly support	33%	46%	28%	30%	34%	15%	50%	20%	43%
	Somewhat support	42%	38%	56%	34%	38%	37%	30%	64%	39%
	Somewhat oppose	17%	10%	10%	22%	16%	44%	12%	16%	8%
	Strongly oppose	4%	2%	2%	10%	4%	4%	8%	-	6%
	Don't know	3%	4%	4%	4%	8%	-	-	-	2%
	Refused	*	-	-	-	-	-	-	-	2%

Q16a. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements. In general, private businesses [IF PRIVATE SECTOR: in your industry] have **the necessary knowledge and expertise** to address issues related to an older workforce.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	16%	34%	6%	18%	10%	13%	24%	16%	7%
	Somewhat agree	33%	34%	24%	40%	30%	56%	10%	26%	44%
	Somewhat disagree	37%	14%	42%	22%	58%	21%	52%	52%	32%
	Strongly disagree	12%	16%	22%	15%	2%	8%	12%	4%	13%
	Don't know	2%	2%	6%	5%	-	2%	-	2%	2%
	Refused	*	-	-	-	-	-	2%	-	2%

53

Q16b. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements. In general, private businesses [IF PRIVATE SECTOR: in your industry] have **the will and desire** to address issues related to an older workforce.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	12%	14%	16%	22%	6%	4%	16%	12%	6%
	Somewhat agree	37%	50%	16%	29%	48%	57%	26%	30%	42%
	Somewhat disagree	37%	28%	44%	33%	40%	31%	40%	46%	35%
	Strongly disagree	12%	8%	20%	13%	6%	6%	16%	10%	16%
	Don't know	1%	-	4%	2%	-	2%	-	2%	1%
	Refused	*	-	-	-	-	-	2%	-	-

Q16c. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements. In general, private businesses [IF PRIVATE SECTOR: in your industry] have **financial resources** to address issues related to an older workforce.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	19%	48%	14%	21%	2%	17%	20%	16%	14%
	Somewhat agree	37%	34%	50%	29%	16%	46%	42%	30%	51%
	Somewhat disagree	32%	8%	22%	32%	64%	32%	28%	42%	25%
	Strongly disagree	9%	6%	10%	11%	14%	4%	6%	10%	9%
	Don't know	3%	4%	4%	6%	4%	-	2%	2%	1%
	Refused	*	-	-	-	-	-	2%	-	-

Q16d. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements. In general, private businesses [IF PRIVATE SECTOR: in your industry] have **a responsibility to society** to address issues related to an older workforce.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	46%	84%	48%	30%	58%	47%	30%	18%	51%
	Somewhat agree	29%	12%	30%	33%	32%	45%	26%	30%	25%
	Somewhat disagree	19%	2%	14%	29%	8%	6%	32%	42%	19%
	Strongly disagree	5%	-	6%	6%	2%	2%	10%	8%	4%
	Don't know	1%	2%	2%	2%	-	-	-	2%	1%
	Refused	*	-	-	-	-	-	2%	-	-

Q17. To the best of your knowledge, is there a particular business sector or industry in our country that is doing a good job of employing and using older workers to their full potential? What is the name of the business or industry?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Services (e.g. food, retail)	13%	-	-	-	16%	2%	64%	10%	14%
	Non-profits/charitable organizations	12%	26%	2%	8%	2%	16%	6%	32%	1%
	Academia	11%	12%	12%	15%	8%	10%	2%	20%	6%
	Government	10%	28%	12%	7%	2%	25%	2%	6%	1%
	Manufacturing/Construction	4%	-	-	6%	22%	-	-	4%	1%
	Agriculture	3%	-	-	4%	12%	-	-	10%	-
	Financial sector	2%	6%	-	3%	-	-	2%	6%	2%
	Health services	2%	-	2%	-	-	4%	4%	2%	3%
	Social welfare services	1%	2%	-	-	6%	-	-	-	-
	Other	4%	2%	2%	11%	6%	-	2%	4%	3%
	No such industry	15%	14%	42%	-	12%	10%	6%	2%	37%
	Don't know	21%	10%	28%	48%	14%	32%	12%	2%	24%
	Refused	1%	-	-	-	-	-	-	2%	7%

54

Q18a. In your opinion, how well do the following words describe older workers [IF PRIVATE SECTOR: in your industry]—very well, somewhat well, not too well, not well at all: **Flexible**.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	12%	16%	2%	10%	6%	36%	2%	6%	14%
	Somewhat well	41%	62%	14%	45%	32%	39%	28%	54%	56%
	Not too well	40%	22%	68%	35%	54%	24%	56%	36%	24%
	Not well at all	5%	-	14%	-	6%	-	12%	2%	4%
	Don't know	2%	-	2%	10%	2%	-	-	-	1%
	Refused	1%	-	-	-	-	-	2%	2%	1%

Q18b. In your opinion, how well do the following words describe older workers [IF PRIVATE SECTOR: in your industry]—very well, somewhat well, not too well, not well at all: **Fast learners**.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	5%	6%	-	10%	2%	16%	-	-	8%
	Somewhat well	33%	62%	10%	19%	16%	57%	28%	16%	58%
	Not too well	51%	32%	74%	50%	68%	27%	56%	74%	29%
	Not well at all	8%	-	16%	13%	12%	-	12%	8%	-
	Don't know	2%	-	-	8%	2%	-	2%	-	5%
	Refused	1%	-	-	-	-	-	2%	2%	1%

Q18c. In your opinion, how well do the following words describe older workers [IF PRIVATE SECTOR: in your industry]—very well, somewhat well, not too well, not well at all: **Open to new technology.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	5%	14%	2%	5%	-	12%	2%	-	3%
	Somewhat well	36%	62%	34%	41%	10%	44%	30%	16%	49%
	Not too well	48%	20%	56%	39%	74%	34%	52%	74%	38%
	Not well at all	8%	4%	2%	9%	12%	10%	14%	6%	6%
	Don't know	3%	-	6%	6%	4%	-	-	2%	4%
	Refused	1%	-	-	-	-	-	2%	2%	1%

55

Q18d. In your opinion, how well do the following words describe older workers [IF PRIVATE SECTOR: in your industry]—very well, somewhat well, not too well, not well at all: **Wise.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	39%	70%	10%	45%	56%	62%	22%	8%	42%
	Somewhat well	51%	28%	80%	41%	38%	36%	64%	68%	55%
	Not too well	7%	-	10%	6%	4%	-	12%	22%	1%
	Not well at all	*	-	-	-	2%	-	2%	-	-
	Don't know	2%	2%	-	8%	-	2%	-	-	1%
	Refused	*	-	-	-	-	-	-	2%	1%

Q18e. In your opinion, how well do the following words describe older workers [IF PRIVATE SECTOR: in your industry]—very well, somewhat well, not too well, not well at all: **Productive.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	18%	42%	6%	18%	6%	31%	8%	-	35%
	Somewhat well	48%	58%	32%	48%	42%	53%	60%	36%	58%
	Not too well	27%	-	50%	21%	44%	16%	24%	56%	5%
	Not well at all	3%	-	6%	4%	8%	-	4%	4%	-
	Don't know	3%	-	6%	9%	-	-	2%	2%	2%
	Refused	*	-	-	-	-	-	2%	2%	-

Q18f. In your opinion, how well do the following words describe older workers [IF PRIVATE SECTOR: in your industry]—very well, somewhat well, not too well, not well at all: **Respected.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very well	28%	28%	36%	47%	16%	39%	12%	8%	37%
	Somewhat well	54%	62%	62%	36%	60%	51%	62%	50%	53%
	Not too well	14%	10%	2%	6%	18%	10%	22%	34%	8%
	Not well at all	2%	-	-	2%	6%	-	2%	6%	-
	Don't know	2%	-	-	10%	-	-	-	-	2%
	Refused	*	-	-	-	-	-	2%	2%	-

Q19. In your view, how likely is it that our country will experience a labor shortage within the next 20 years—very likely, somewhat likely, not too likely, or not likely at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very likely	37%	30%	26%	14%	48%	43%	48%	56%	26%
	Somewhat likely	32%	34%	36%	12%	34%	42%	26%	34%	34%
	Not too likely	19%	24%	26%	21%	16%	10%	18%	8%	29%
	Not likely at all	11%	10%	10%	49%	2%	4%	2%	-	7%
	Don't know	2%	2%	2%	3%	-	-	6%	2%	2%
	Refused	*	-	-	-	-	-	-	-	2%

56

Q20. How likely is it that we will adopt more liberal immigration policies to compensate for this labor shortage—very likely, somewhat likely, not too likely, or not likely at all?

Based on respondents who think a labor shortage is very likely or somewhat likely

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	285	32	31	13	41	42	37	45	44
	WEIGHTED BASE	272	32	31	13	41	43	37	45	30
	Very likely	34%	53%	3%	41%	10%	53%	62%	33%	18%
	Somewhat likely	41%	34%	35%	37%	51%	33%	30%	47%	59%
	Not too likely	16%	3%	42%	22%	29%	7%	3%	13%	20%
	Not likely at all	4%	-	13%	-	10%	-	3%	4%	-
	Don't know	4%	9%	6%	-	-	7%	3%	2%	-
	Refused	*	-	-	-	-	-	-	-	3%

Q20. How likely is it that we will adopt more liberal immigration policies to compensate for this labor shortage—very likely, somewhat likely, not too likely, or not likely at all?

Based on all survey respondents

		total	COUNTRY							
		Total	AUS	CHI	IND	JAP	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very likely	24%	34%	2%	12%	8%	46%	46%	30%	12%
	Somewhat likely	28%	22%	22%	10%	42%	28%	22%	42%	36%
	Not too likely	11%	2%	26%	6%	24%	6%	2%	12%	12%
	Not likely at all	3%	-	8%	-	8%	-	2%	4%	-
	Don't know	3%	6%	4%	-	-	6%	2%	2%	-
	Refused	*	-	-	-	-	-	-	-	2%
	Not asked	32%	36%	38%	72%	18%	14%	26%	10%	38%

Q21. In your opinion, which of the following should have primary responsibility for providing for people in their old age?²⁵

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Government	31%	28%	62%	10%	42%	28%	14%	46%	19%
	Employers	4%	2%	10%	2%	6%	2%	2%	2%	8%
	Individual older people	30%	44%	8%	6%	28%	43%	50%	32%	30%
	Family members/children	8%	-	14%	4%	16%	2%	10%	14%	6%
	Community	1%	2%	-	2%	4%	-	-	2%	-
	Combination (Volunteered)	23%	20%	2%	77%	4%	22%	24%	2%	33%
	Don't know	1%	2%	4%	-	-	2%	-	2%	-
	Refused	1%	2%	-	-	-	-	-	-	4%

57

Q22a. If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following: **Government**.

Based on those who responded to this series of questions

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	399	46	48	50	50	48	49	47	61
	WEIGHTED BASE	380	46	48	50	50	49	49	47	41
	0%	5%	2%	-	8%	-	2%	24%	-	4%
	1-10%	12%	9%	13%	18%	8%	6%	16%	17%	8%
	11-20%	15%	13%	10%	10%	10%	4%	31%	30%	16%
	21-30%	21%	39%	13%	12%	22%	17%	18%	23%	28%
	31-40%	13%	24%	10%	6%	6%	34%	-	6%	16%
	41-50%	19%	13%	25%	27%	30%	19%	8%	13%	18%
	51-60%	5%	-	4%	8%	6%	8%	2%	4%	5%
	61-70%	5%	-	15%	4%	14%	2%	-	-	1%
	71-80%	2%	-	6%	4%	-	4%	-	2%	-
	81-90%	1%	-	-	-	-	4%	-	4%	-
	91-100%	2%	-	4%	4%	4%	-	-	-	2%

Q22b. If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following: **Employers**.

Based on those who responded to this series of questions

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	399	46	48	50	50	48	49	47	61
	WEIGHTED BASE	380	46	48	50	50	49	49	47	41
	0%	27%	20%	21%	32%	32%	52%	31%	13%	14%
	1-10%	22%	46%	23%	15%	22%	20%	20%	26%	4%
	11-20%	19%	17%	21%	16%	22%	15%	18%	23%	15%
	21-30%	21%	11%	25%	28%	18%	11%	20%	23%	29%
	31-40%	5%	4%	2%	-	-	-	4%	9%	20%
	41-50%	6%	2%	4%	9%	6%	2%	6%	4%	14%
	51-60%	1%	-	4%	-	-	-	-	-	2%
	61-70%	*	-	-	-	-	-	-	2%	2%
	71-80%	-	-	-	-	-	-	-	-	-
	81-90%	-	-	-	-	-	-	-	-	-
	91-100%	-	-	-	-	-	-	-	-	-

²⁵ Prior to being asked this question, all respondents were read the following: In the following questions, when we ask about people in their old age or older people, we are referring to older people who are retired or past retirement age. (By retired, we mean no longer working for pay.)

Q22c. If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following: **Individual older people themselves.**

Based on those who responded to this series of questions

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	399	46	48	50	50	48	49	47	61
	WEIGHTED BASE	380	46	48	50	50	49	49	47	41
	0%	13%	-	35%	32%	12%	2%	4%	9%	5%
	1-10%	14%	-	25%	18%	20%	8%	10%	21%	8%
	11-20%	13%	4%	19%	11%	18%	8%	10%	15%	16%
	21-30%	15%	17%	10%	14%	20%	8%	16%	13%	23%
	31-40%	13%	28%	4%	6%	10%	23%	6%	9%	19%
	41-50%	16%	15%	2%	11%	16%	23%	22%	28%	10%
	51-60%	7%	15%	-	4%	-	11%	14%	4%	8%
	61-70%	3%	7%	4%	2%	2%	2%	2%	-	5%
	71-80%	4%	9%	-	-	2%	10%	8%	2%	3%
	81-90%	1%	2%	-	-	-	2%	-	-	3%
	91-100%	2%	2%	-	2%	-	2%	6%	-	-

58

Q22d. If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following: **Family members/Children.**

Based on those who responded to this series of questions

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	399	46	48	50	50	48	49	47	61
	WEIGHTED BASE	380	46	48	50	50	49	49	47	41
	0%	40%	59%	10%	28%	38%	69%	22%	26%	70%
	1-10%	29%	41%	40%	13%	36%	27%	16%	34%	25%
	11-20%	16%	-	27%	19%	20%	-	29%	30%	5%
	21-30%	9%	-	15%	22%	6%	-	22%	6%	-
	31-40%	2%	-	4%	4%	-	2%	6%	2%	-
	41-50%	2%	-	2%	10%	-	-	-	2%	-
	51-60%	1%	-	2%	3%	-	2%	4%	-	-
	61-70%	-	-	-	-	-	-	-	-	-
	71-80%	-	-	-	-	-	-	-	-	-
	81-90%	-	-	-	-	-	-	-	-	-
	91-100%	-	-	-	-	-	-	-	-	-

Q22e. If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following: **Community.**

Based on those who responded to this series of questions

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	399	46	48	50	50	48	49	47	61
	WEIGHTED BASE	380	46	48	50	50	49	49	47	41
	0%	61%	43%	52%	60%	52%	94%	53%	51%	86%
	1-10%	30%	48%	40%	27%	26%	6%	39%	43%	12%
	11-20%	6%	9%	8%	8%	12%	-	4%	6%	2%
	21-30%	2%	-	-	-	10%	-	4%	-	-
	31-40%	*	-	-	2%	-	-	-	-	-
	41-50%	*	-	-	3%	-	-	-	-	-
	51-60%	-	-	-	-	-	-	-	-	-
	61-70%	-	-	-	-	-	-	-	-	-
	71-80%	-	-	-	-	-	-	-	-	-
	81-90%	-	-	-	-	-	-	-	-	-
	91-100%	-	-	-	-	-	-	-	-	-

Q22f. If you had to determine the optimal mix of income for people in their old age, what percent would come from each of the following: **Other**.

Based on those who responded to this series of questions

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	399	46	48	50	50	48	49	47	61
	WEIGHTED BASE	380	46	48	50	50	49	49	47	41
	0%	95%	100%	79%	96%	100%	100%	100%	87%	96%
	1-10%	5%	-	21%	2%	-	-	-	11%	4%
	11-20%	1%	-	-	2%	-	-	-	2%	-
	21-30%	-	-	-	-	-	-	-	-	-
	31-40%	-	-	-	-	-	-	-	-	-
	41-50%	-	-	-	-	-	-	-	-	-
	51-60%	-	-	-	-	-	-	-	-	-
	61-70%	-	-	-	-	-	-	-	-	-
	71-80%	-	-	-	-	-	-	-	-	-
	81-90%	-	-	-	-	-	-	-	-	-
91-100%	-	-	-	-	-	-	-	-	-	

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Q23a. In your opinion, how big a role should family play in providing the following types of support to people in their old age? Should family play a big role, moderate role, small role, or no role at all in **providing retirement income**?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Big role	14%	-	26%	53%	4%	6%	14%	8%	3%
	Moderate role	27%	12%	28%	26%	22%	20%	44%	52%	16%
	Small role	37%	40%	34%	8%	58%	37%	34%	38%	45%
	No role at all	21%	48%	10%	13%	16%	37%	8%	2%	33%
	Don't know	*	-	2%	-	-	-	-	-	1%
	Refused	*	-	-	-	-	-	-	-	2%

Q23b. In your opinion, how big a role should family play in providing the following types of support to people in their old age? Should family play a big role, moderate role, small role, or no role at all in **providing long-term care for sick or disabled**?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Big role	32%	-	70%	86%	12%	20%	36%	16%	16%
	Moderate role	37%	40%	20%	10%	34%	45%	54%	54%	43%
	Small role	25%	44%	8%	2%	48%	29%	8%	26%	32%
	No role at all	5%	14%	-	2%	6%	6%	2%	4%	5%
	Don't know	1%	2%	2%	-	-	-	-	-	1%
	Refused	*	-	-	-	-	-	-	-	3%

Q23c. In your opinion, how big a role should family play in providing the following types of support to people in their old age? Should family play a big role, moderate role, small role, or no role at all in **providing housing**?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Big role	23%	4%	50%	78%	8%	8%	22%	6%	7%
	Moderate role	32%	24%	26%	18%	40%	36%	38%	44%	31%
	Small role	37%	60%	14%	2%	44%	45%	32%	44%	54%
	No role at all	7%	12%	8%	2%	8%	10%	8%	4%	6%
	Don't know	*	-	2%	-	-	-	-	-	1%
	Refused	1%	-	-	-	-	-	-	2%	2%

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Q23d. In your opinion, how big a role should family play in providing the following types of support to people in their old age? Should family play a big role, moderate role, small role, or no role at all in **providing transportation**?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Big role	22%	4%	46%	65%	10%	20%	16%	4%	13%
	Moderate role	40%	34%	34%	21%	42%	57%	34%	50%	47%
	Small role	32%	62%	14%	14%	34%	21%	40%	42%	31%
	No role at all	5%	-	4%	-	14%	2%	8%	4%	5%
	Don't know	1%	-	2%	-	-	-	2%	-	1%
	Refused	*	-	-	-	-	-	-	-	3%

Q23e. In your opinion, how big a role should family play in providing the following types of support to people in their old age? Should family play a big role, moderate role, small role, or no role at all in **providing health care costs, including medicine**?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Big role	19%	2%	28%	77%	6%	-	24%	14%	1%
	Moderate role	29%	6%	32%	18%	30%	24%	46%	52%	21%
	Small role	38%	68%	30%	6%	44%	51%	24%	32%	49%
	No role at all	14%	24%	8%	-	20%	25%	6%	2%	26%
	Don't know	*	-	2%	-	-	-	-	-	1%
	Refused	*	-	-	-	-	-	-	-	2%

Q24a. As more people age and stop working, the costs for providing for this growing number of older people will increase. To what extent should **the age of eligibility for pensions be increased, for those receiving pensions** to help cover these increased costs—great extent, moderate extent, small extent, or not at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Great extent	18%	24%	22%	39%	16%	6%	10%	12%	14%
	Moderate extent	40%	38%	40%	43%	38%	30%	36%	58%	34%
	Small extent	19%	26%	16%	4%	22%	22%	22%	16%	24%
	Not at all	19%	12%	18%	2%	24%	41%	14%	14%	23%
	Don't know	3%	-	4%	8%	-	-	8%	-	2%
	Refused	2%	-	-	5%	-	-	10%	-	2%

Q24b. As more people age and stop working, the costs for providing for this growing number of older people will increase. To what extent should **taxes be increased** to help cover these increased costs—great extent, moderate extent, small extent, or not at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Great extent	12%	24%	24%	2%	18%	4%	4%	8%	10%
	Moderate extent	33%	50%	30%	20%	38%	16%	26%	46%	36%
	Small extent	32%	18%	26%	29%	24%	33%	46%	40%	37%
	Not at all	21%	6%	12%	45%	18%	45%	20%	6%	14%
	Don't know	2%	2%	8%	4%	2%	2%	2%	-	-
	Refused	1%	-	-	-	-	-	2%	-	3%

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Q24c. As more people age and stop working, the costs for providing for this growing number of older people will increase. To what extent should **private savings be made mandatory/mandatory private savings be increased** to help cover these increased costs—great extent, moderate extent, small extent, or not at all?²⁶

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Great extent	30%	36%	24%	45%	6%	76%	20%	10%	26%
	Moderate extent	32%	46%	26%	37%	24%	14%	36%	48%	24%
	Small extent	21%	16%	16%	9%	36%	6%	32%	24%	25%
	Not at all	15%	2%	32%	4%	30%	2%	12%	16%	23%
	Don't know	2%	-	2%	4%	2%	2%	-	2%	-
	Refused	*	-	-	-	2%	-	-	-	2%

Q24d. As more people age and stop working, the costs for providing for this growing number of older people will increase. To what extent should **pensions be reduced, for those receiving pensions** to help cover these increased costs—great extent, moderate extent, small extent, or not at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Great extent	3%	2%	2%	4%	12%	-	2%	4%	1%
	Moderate extent	18%	12%	14%	12%	28%	8%	12%	48%	14%
	Small extent	28%	18%	40%	13%	28%	37%	36%	30%	21%
	Not at all	47%	68%	40%	63%	28%	55%	42%	18%	61%
	Don't know	2%	-	4%	6%	4%	-	6%	-	-
	Refused	1%	-	-	4%	-	-	2%	-	3%

²⁶ Opinion leaders in China, India, Japan, New Zealand, South Korea, and the US were asked "private savings be made mandatory." Opinion leaders in Australia were asked "superannuation contributions be increased." Opinion leaders in Singapore were asked "mandatory private savings be increased."

Q24e. As more people age and stop working, the costs for providing for this growing number of older people will increase. To what extent should **people be educated about the importance of saving and encouraged to save more** to help cover these increased costs—great extent, moderate extent, small extent, or not at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Great extent	58%	94%	30%	80%	2%	86%	66%	18%	88%
	Moderate extent	22%	4%	38%	18%	24%	14%	18%	54%	10%
	Small extent	10%	-	14%	-	32%	-	12%	24%	-
	Not at all	7%	2%	16%	-	38%	-	-	4%	-
	Don't know	1%	-	2%	2%	2%	-	2%	-	1%
	Refused	1%	-	-	-	2%	-	2%	-	2%

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Q25. In general, is it best for relatively healthy older people to...

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	live independently as long as possible	59%	98%	30%	32%	58%	76%	64%	28%	87%
	live with extended families	23%	-	22%	49%	38%	6%	28%	36%	3%
	live in assisted care facilities	13%	2%	40%	2%	4%	18%	2%	32%	4%
	live in nursing homes	1%	-	6%	-	-	-	-	2%	-
	Other/It depends (Volunteered)	3%	-	2%	15%	-	-	2%	-	4%
	Don't know	1%	-	-	2%	-	-	4%	2%	-
	Refused	*	-	-	-	-	-	-	-	2%

Q26a. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: **Older people in our country are generally helpful, contributing members of society.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	47%	34%	64%	63%	22%	63%	42%	16%	71%
	Somewhat agree	45%	60%	32%	31%	70%	32%	46%	62%	25%
	Somewhat disagree	7%	6%	4%	4%	6%	2%	10%	22%	3%
	Strongly disagree	1%	-	-	-	2%	2%	-	-	2%
	Don't know	*	-	-	2%	-	-	2%	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q26b. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: **The business community views older people as an opportunity for marketing and selling products and services.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	32%	34%	38%	24%	42%	31%	14%	16%	55%
	Somewhat agree	42%	44%	50%	17%	50%	43%	36%	62%	35%
	Somewhat disagree	16%	14%	8%	25%	4%	14%	40%	20%	5%
	Strongly disagree	7%	-	2%	30%	2%	8%	10%	-	3%
	Don't know	3%	8%	2%	4%	2%	4%	-	2%	-
	Refused	*	-	-	-	-	-	-	-	1%

Q26c. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: **The business community views older people as a source of potential productive workers.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	5%	-	4%	15%	8%	4%	-	4%	7%
	Somewhat agree	33%	34%	38%	26%	44%	28%	18%	30%	44%
	Somewhat disagree	45%	46%	42%	24%	36%	55%	62%	56%	42%
	Strongly disagree	15%	20%	16%	27%	10%	12%	20%	8%	7%
	Don't know	1%	-	-	8%	2%	-	-	2%	-
	Refused	-	-	-	-	-	-	-	-	-

63

Q26d. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: **Our government should do more to take advantage of the contributions that older people can make to the community by enlisting them to help with community projects.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	50%	38%	48%	68%	56%	49%	46%	34%	61%
	Somewhat agree	42%	56%	50%	18%	32%	47%	44%	54%	36%
	Somewhat disagree	5%	-	2%	6%	10%	4%	8%	8%	2%
	Strongly disagree	2%	6%	-	5%	-	-	-	2%	-
	Don't know	1%	-	-	4%	2%	-	2%	2%	1%
	Refused	-	-	-	-	-	-	-	-	-

Q26e. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: **Older people are often a burden on the community.**

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	3%	4%	2%	-	2%	6%	2%	2%	3%
	Somewhat agree	25%	52%	12%	2%	16%	25%	16%	54%	22%
	Somewhat disagree	32%	20%	46%	10%	36%	38%	36%	24%	43%
	Strongly disagree	40%	24%	40%	85%	46%	30%	42%	18%	31%
	Don't know	1%	-	-	2%	-	-	2%	2%	1%
	Refused	*	-	-	2%	-	-	2%	-	-

Q27. How would you describe the overall quality of life of older people in our country—is it very good, somewhat good, somewhat bad or very bad?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very good	13%	24%	-	6%	6%	37%	8%	-	25%
	Somewhat good	49%	72%	50%	30%	58%	55%	66%	4%	55%
	Somewhat bad	28%	-	44%	40%	30%	8%	22%	64%	13%
	Very bad	8%	-	2%	21%	4%	-	4%	32%	-
	Don't know	1%	2%	4%	3%	-	-	-	-	3%
	Refused	1%	2%	-	-	2%	-	-	-	4%

Q28. And 20 years from now, do you think the overall quality of life of older people in our country will have gotten much better, somewhat better, somewhat worse, or much worse?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Much better	7%	8%	2%	10%	2%	8%	10%	4%	11%
	Somewhat better	53%	64%	74%	39%	28%	61%	56%	56%	49%
	Somewhat worse	25%	4%	16%	30%	48%	18%	28%	24%	33%
	Much worse	6%	2%	-	9%	16%	2%	4%	12%	-
	Stayed about the same (Volunteered)	6%	20%	6%	10%	4%	6%	-	2%	3%
	Don't know	2%	2%	2%	2%	-	4%	2%	2%	2%
	Refused	*	-	-	-	2%	-	-	-	1%

64

Q29. Do you think that the average older person's pension and benefits from the government or from their employers is generally sufficient for an older person to live very comfortably, somewhat comfortably, not too comfortably, or not comfortably at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very comfortably	2%	2%	2%	2%	4%	2%	-	-	5%
	Somewhat comfortably	42%	68%	60%	29%	40%	46%	20%	28%	41%
	Not too comfortably	43%	28%	34%	44%	54%	48%	46%	50%	41%
	Not comfortably at all	10%	2%	-	15%	2%	2%	28%	22%	10%
	Don't know	2%	-	4%	7%	-	2%	4%	-	1%
	Refused	1%	-	-	3%	-	-	2%	-	2%

Q30a. Do you think our government should increase its efforts to **ensure that older people receive the health services they need** a great deal, moderately, a little, or not at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	A great deal	53%	18%	90%	89%	50%	24%	54%	60%	36%
	Moderately	33%	46%	6%	7%	34%	61%	42%	34%	36%
	A little	10%	32%	4%	2%	10%	12%	2%	6%	14%
	Not at all	3%	4%	-	2%	4%	2%	-	-	9%
	Government should decrease efforts (Volunteered)	*	-	-	-	2%	-	-	-	-
	Don't know	*	-	-	-	-	-	2%	-	1%
	Refused	*	-	-	-	-	-	-	-	3%

Q30b. Do you think our government should increase its efforts to **ensure that older people have access to adequate housing** a great deal, moderately, a little, or not at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	A great deal	38%	14%	34%	71%	34%	24%	40%	56%	31%
	Moderately	39%	58%	44%	15%	42%	49%	34%	34%	39%
	A little	17%	22%	20%	11%	14%	21%	20%	10%	20%
	Not at all	4%	4%	-	2%	8%	6%	6%	-	7%
	Government should decrease efforts (Volunteered)	-	-	-	-	-	-	-	-	-
	Don't know	1%	2%	2%	-	2%	-	-	-	-
	Refused	*	-	-	-	-	-	-	-	3%

65

Q31a. Is the **central/federal government** very committed, somewhat committed, not too committed, or not committed at all to improving the quality of life for older people?²⁷

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very committed	14%	10%	6%	8%	2%	34%	34%	8%	11%
	Somewhat committed	53%	72%	50%	38%	52%	64%	60%	36%	56%
	Not too committed	27%	12%	40%	39%	38%	-	6%	50%	27%
	Not committed at all	4%	6%	-	11%	8%	-	-	4%	3%
	Don't know	1%	-	4%	2%	-	2%	-	2%	-
	Refused	1%	-	-	2%	-	-	-	-	3%

Q31b. Is the **business community** very committed, somewhat committed, not too committed, or not committed at all to improving the quality of life for older people?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very committed	1%	-	2%	2%	-	-	4%	-	3%
	Somewhat committed	21%	28%	20%	17%	30%	12%	18%	12%	30%
	Not too committed	57%	50%	58%	44%	58%	61%	66%	66%	55%
	Not committed at all	17%	22%	12%	29%	12%	25%	10%	20%	10%
	Don't know	3%	-	8%	7%	-	2%	2%	2%	-
	Refused	1%	-	-	2%	-	-	-	-	3%

²⁷ Respondents in Australia and the US were asked about "the federal government." Respondents in China, India, Japan, and South Korea were asked about "the central government." Respondents in New Zealand were asked about "the government." Respondents in Singapore were asked about "the Singapore government."

Q31c. Are **non-governmental organizations** very committed, somewhat committed, not too committed, or not committed at all to improving the quality of life for older people?²⁸

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very committed	27%	64%	4%	14%	12%	62%	46%	-	14%
	Somewhat committed	48%	36%	40%	63%	58%	30%	40%	52%	67%
	Not too committed	16%	-	46%	13%	14%	2%	10%	32%	12%
	Not committed at all	4%	-	4%	6%	6%	-	-	16%	1%
	Don't know	4%	-	6%	4%	10%	6%	4%	-	3%
	Refused	*	-	-	-	-	-	-	-	3%

66

Q31d. Are **local governments/state and local governments** very committed, somewhat committed, not too committed, or not committed at all to improving the quality of life for older people?²⁹

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	324	50	50	50	50	-	-	50	74
	WEIGHTED BASE	300	50	50	50	50	-	-	50	50
	Very committed	4%	8%	2%	2%	4%	-	-	2%	4%
	Somewhat committed	41%	44%	34%	37%	56%	-	-	22%	56%
	Not too committed	44%	40%	54%	40%	36%	-	-	60%	32%
	Not committed at all	10%	8%	10%	21%	4%	-	-	12%	4%
	Don't know	1%	-	-	-	-	-	-	4%	2%
	Refused	*	-	-	-	-	-	-	-	2%

Q31e. Are **labor unions** very committed, somewhat committed, not too committed, or not committed at all to improving the quality of life for older people?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very committed	5%	2%	2%	4%	2%	2%	20%	2%	6%
	Somewhat committed	27%	20%	14%	19%	26%	33%	46%	18%	37%
	Not too committed	38%	22%	56%	20%	50%	38%	26%	60%	33%
	Not committed at all	21%	34%	20%	51%	18%	16%	4%	18%	8%
	Don't know	8%	22%	8%	4%	4%	10%	4%	2%	11%
	Refused	1%	-	-	2%	-	-	-	-	4%

²⁸ Respondents were given two or three examples of local groups.

²⁹ Respondents in Australia, India, and the US were asked about "state and local governments." Respondents in China, Japan, and South Korea were asked about "local government." This question was not asked in New Zealand or Singapore.

Q32a. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements:
An adequate retirement income is available to people of all social and economic backgrounds in our country.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	6%	4%	8%	4%	10%	10%	2%	6%	3%
	Somewhat agree	23%	48%	14%	4%	26%	38%	18%	14%	20%
	Somewhat disagree	36%	24%	42%	17%	36%	46%	48%	48%	25%
	Strongly disagree	35%	22%	36%	72%	28%	4%	32%	32%	50%
	Don't know	1%	2%	-	2%	-	2%	-	-	-
	Refused	*	-	-	-	-	-	-	-	2%

67

Q32b. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements:
Access to quality health care is available to older people of all social and economic backgrounds in our country.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	11%	10%	10%	2%	14%	21%	10%	10%	8%
	Somewhat agree	35%	66%	12%	10%	44%	45%	58%	14%	32%
	Somewhat disagree	26%	14%	40%	18%	26%	25%	20%	46%	19%
	Strongly disagree	27%	8%	36%	68%	16%	8%	12%	30%	38%
	Don't know	1%	2%	2%	2%	-	2%	-	-	-
	Refused	*	-	-	-	-	-	-	-	2%

Q32c. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements:
Adequate housing is available to older people of all social and economic backgrounds in our country.

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Strongly agree	10%	14%	6%	2%	10%	24%	20%	6%	1%
	Somewhat agree	33%	56%	16%	10%	40%	53%	50%	10%	26%
	Somewhat disagree	31%	22%	56%	23%	32%	14%	22%	52%	23%
	Strongly disagree	25%	6%	20%	64%	18%	6%	6%	32%	45%
	Don't know	2%	2%	2%	2%	-	2%	2%	-	3%
	Refused	*	-	-	-	-	-	-	-	2%

Q33a. How helpful do you think technology, such as computers and robots, will be in **extending the productive work lives of older workers** in our country over the next 20 years—very helpful, somewhat helpful, not too helpful, or not helpful at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	35%	60%	18%	48%	22%	47%	40%	8%	36%
	Somewhat helpful	45%	38%	52%	27%	56%	51%	46%	42%	45%
	Not too helpful	16%	2%	24%	16%	18%	-	8%	44%	16%
	Not helpful at all	3%	-	6%	6%	4%	-	4%	6%	-
	Don't know	1%	-	-	4%	-	2%	2%	-	1%
	Refused	*	-	-	-	-	-	-	-	2%

Q33b. How helpful do you think technology, such as computers and robots, will be in **extending independent living by older people** in our country over the next 20 years—very helpful, somewhat helpful, not too helpful, or not helpful at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	36%	74%	28%	28%	20%	64%	36%	6%	31%
	Somewhat helpful	49%	24%	58%	48%	60%	34%	54%	68%	48%
	Not too helpful	11%	2%	8%	17%	20%	-	6%	22%	16%
	Not helpful at all	1%	-	4%	4%	-	-	2%	2%	-
	Don't know	2%	-	2%	4%	-	2%	2%	2%	1%
	Refused	1%	-	-	-	-	-	-	-	4%

68

Q33c. How helpful do you think technology, such as computers and robots, will be in **improving health and medical care of older people** in our country over the next 20 years—very helpful, somewhat helpful, not too helpful, or not helpful at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	48%	90%	42%	40%	32%	80%	46%	18%	36%
	Somewhat helpful	42%	10%	52%	47%	50%	16%	46%	58%	54%
	Not too helpful	7%	-	4%	9%	16%	2%	2%	16%	6%
	Not helpful at all	2%	-	2%	-	2%	-	2%	6%	2%
	Don't know	1%	-	-	4%	-	2%	4%	2%	-
	Refused	*	-	-	-	-	-	-	-	3%

Q34AUS. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	50	-	-	-	-	-	-	-
	WEIGHTED BASE	-	50	-	-	-	-	-	-	-
	Council on the Aging	-	42%	-	-	-	-	-	-	-
	National Seniors Association	-	30%	-	-	-	-	-	-	-
	Advocare	-	14%	-	-	-	-	-	-	-
	Salvation Army	-	20%	-	-	-	-	-	-	-
	Red Cross	-	8%	-	-	-	-	-	-	-
	Alzheimers Australia	-	6%	-	-	-	-	-	-	-
	National Heart Foundation Australia	-	2%	-	-	-	-	-	-	-
	Australian Retired Persons Association	-	4%	-	-	-	-	-	-	-
	Combined Pensioners and Superannuants Association	-	4%	-	-	-	-	-	-	-
	St Vincent de Paul Society	-	6%	-	-	-	-	-	-	-
	Anglicare	-	4%	-	-	-	-	-	-	-
	Catholic Social Services	-	2%	-	-	-	-	-	-	-
	Over 50s Association	-	2%	-	-	-	-	-	-	-
	Association of Independent Retirees	-	2%	-	-	-	-	-	-	-
	Grey Pass website	-	2%	-	-	-	-	-	-	-
	Community Housing Group	-	2%	-	-	-	-	-	-	-
	Carers Australia	-	2%	-	-	-	-	-	-	-
	Aged and Community Services Association	-	2%	-	-	-	-	-	-	-
	Australian Association of Gerontologists	-	2%	-	-	-	-	-	-	-
	National Council of Social Services	-	2%	-	-	-	-	-	-	-
	Department of Health and Ageing	-	6%	-	-	-	-	-	-	-
	Office of Seniors Interests	-	2%	-	-	-	-	-	-	-
	Government agencies	-	2%	-	-	-	-	-	-	-
	Charitable organizations	-	34%	-	-	-	-	-	-	-
	Universities	-	4%	-	-	-	-	-	-	-
	Websites	-	2%	-	-	-	-	-	-	-
	Religious organizations	-	4%	-	-	-	-	-	-	-
	No, not aware of any organizations	-	8%	-	-	-	-	-	-	-
	Don't know	-	14%	-	-	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

69

Q34CHI. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

		total	country							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	50	-	-	-	-	-	-
	WEIGHTED BASE	-	-	50	-	-	-	-	-	-
	China National Committee on Aging	-	-	18%	-	-	-	-	-	-
	National Population and Family Planning Commission of China	-	-	2%	-	-	-	-	-	-
	Old Age Association	-	-	2%	-	-	-	-	-	-
	Civil affairs organizations	-	-	6%	-	-	-	-	-	-
	Elderly activity centers	-	-	4%	-	-	-	-	-	-
	Nursing homes	-	-	2%	-	-	-	-	-	-
	University research institutes	-	-	2%	-	-	-	-	-	-
	No, not aware of any organizations	-	-	50%	-	-	-	-	-	-
	Don't know	-	-	14%	-	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q34IND. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	-	50	-	-	-	-	-
	WEIGHTED BASE	-	-	-	50	-	-	-	-	-
	HelpAge	-	-	-	48%	-	-	-	-	-
	Care	-	-	-	15%	-	-	-	-	-
	Harmony Initiative	-	-	-	8%	-	-	-	-	-
	Dignity Foundation	-	-	-	6%	-	-	-	-	-
	Age Care	-	-	-	2%	-	-	-	-	-
	Mother Theresa Organization	-	-	-	4%	-	-	-	-	-
	Sonali Shiksha Community	-	-	-	2%	-	-	-	-	-
	Vishranthi Charitable Trust	-	-	-	2%	-	-	-	-	-
	All India Pensioners' Association	-	-	-	2%	-	-	-	-	-
	ASTHA	-	-	-	2%	-	-	-	-	-
	Prayas	-	-	-	2%	-	-	-	-	-
	Lions Club	-	-	-	2%	-	-	-	-	-
	ICICI Bank	-	-	-	2%	-	-	-	-	-
	Ministry of Social Justice and Empowerment	-	-	-	4%	-	-	-	-	-
	Charitable organizations, NGOs	-	-	-	9%	-	-	-	-	-
	Old homes	-	-	-	2%	-	-	-	-	-
	No, not aware of any organization	-	-	-	21%	-	-	-	-	-
	Don't know	-	-	-	8%	-	-	-	-	-
	Refused	-	-	-	2%	-	-	-	-	-

70

Q34JPN. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	-	-	50	-	-	-	-
	WEIGHTED BASE	-	-	-	-	50	-	-	-	-
	Japanese Society of Caregiving for the Elderly	-	-	-	-	4%	-	-	-	-
	International Longevity Center	-	-	-	-	2%	-	-	-	-
	Tokyo Metropolitan Institute of Gerontology	-	-	-	-	2%	-	-	-	-
	Ikiiki-Zaidan	-	-	-	-	2%	-	-	-	-
	Institute for the Support of the Elderly and Handicapped	-	-	-	-	2%	-	-	-	-
	Association of Elderly Clubs	-	-	-	-	2%	-	-	-	-
	Social Welfare Committee	-	-	-	-	2%	-	-	-	-
	Care Insurance Service Provider	-	-	-	-	2%	-	-	-	-
	No, not aware of any organizations	-	-	-	-	40%	-	-	-	-
	Don't know	-	-	-	-	44%	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q34KOR. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	-	-	-	-	-	50	-
	WEIGHTED BASE	-	-	-	-	-	-	-	50	-
	Korean Senior Citizen Association	-	-	-	-	-	-	-	16%	-
	Korean Association of Retired Persons	-	-	-	-	-	-	-	2%	-
	Silver Line	-	-	-	-	-	-	-	2%	-
	Citizens' Coalition for Economic Justice	-	-	-	-	-	-	-	2%	-
	Federation of Korean Gerontological Societies	-	-	-	-	-	-	-	2%	-
	Korean Information and Referral Service Center on Aging	-	-	-	-	-	-	-	2%	-
	Ministry of Health and Welfare	-	-	-	-	-	-	-	22%	-
	Ministry of Gender Equality and Family	-	-	-	-	-	-	-	2%	-
	Ministry of Labor	-	-	-	-	-	-	-	2%	-
	National Pension Service	-	-	-	-	-	-	-	6%	-
	Local government social welfare agencies	-	-	-	-	-	-	-	4%	-
	Seoul City Job Introduction Center	-	-	-	-	-	-	-	2%	-
	Korea Labor Force Development Institute for the Aged	-	-	-	-	-	-	-	6%	-
	Korea Institute for Health and Social Affairs	-	-	-	-	-	-	-	4%	-
	Korea Development Institute	-	-	-	-	-	-	-	2%	-
	No, not aware of any organizations	-	-	-	-	-	-	-	22%	-
	Don't know	-	-	-	-	-	-	-	40%	-
	Refused	-	-	-	-	-	-	-	4%	-

71

Q34NZ. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	-	-	-	49	-	-	-
	WEIGHTED BASE	-	-	-	-	-	50	-	-	-
	Grey Power	-	-	-	-	-	30%	-	-	-
	Age Concern	-	-	-	-	-	12%	-	-	-
	Red Cross	-	-	-	-	-	4%	-	-	-
	St Vincent de Paul Society	-	-	-	-	-	2%	-	-	-
	Alzheimers New Zealand	-	-	-	-	-	4%	-	-	-
	Retirement Commission	-	-	-	-	-	6%	-	-	-
	Human Rights Commission	-	-	-	-	-	2%	-	-	-
	Equal Employment Opportunities Trust	-	-	-	-	-	2%	-	-	-
	University of Third Age	-	-	-	-	-	2%	-	-	-
	City Councils	-	-	-	-	-	6%	-	-	-
	District Health Boards	-	-	-	-	-	2%	-	-	-
	Government agencies	-	-	-	-	-	2%	-	-	-
	Charitable organizations	-	-	-	-	-	4%	-	-	-
	Research institutes	-	-	-	-	-	4%	-	-	-
	Religious organizations	-	-	-	-	-	2%	-	-	-
	No, not aware of any organizations	-	-	-	-	-	13%	-	-	-
	Don't know	-	-	-	-	-	34%	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q34SIN. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	-	-	-	-	50	-	-
	WEIGHTED BASE	-	-	-	-	-	-	50	-	-
	Singapore Action Group of Elders	-	-	-	-	-	-	34%	-	-
	Tsao Foundation	-	-	-	-	-	-	14%	-	-
	St. Luke's Hospital and Eldercare	-	-	-	-	-	-	2%	-	-
	Lions Befrienders	-	-	-	-	-	-	4%	-	-
	Marine Parade Family Service Center	-	-	-	-	-	-	2%	-	-
	Agency for Lifelong Learning	-	-	-	-	-	-	2%	-	-
	Thye Hwa Kwan Moral Society	-	-	-	-	-	-	2%	-	-
	Lien Foundation	-	-	-	-	-	-	2%	-	-
	Caring Hands Retired and Senior Volunteer Program	-	-	-	-	-	-	2%	-	-
	National Kidney Foundation	-	-	-	-	-	-	2%	-	-
	National Council of Social Services	-	-	-	-	-	-	4%	-	-
	Singapore National Employers Federation	-	-	-	-	-	-	4%	-	-
	National Trade Union Congress	-	-	-	-	-	-	8%	-	-
	Singapore Professionals and Executives Cooperative	-	-	-	-	-	-	2%	-	-
	Ministry of Community Development, Youth, and Sports	-	-	-	-	-	-	8%	-	-
	Ministry of Health	-	-	-	-	-	-	2%	-	-
	Ministry of Manpower	-	-	-	-	-	-	2%	-	-
	Central Provident Fund	-	-	-	-	-	-	2%	-	-
	Singapore Human Resources Institute	-	-	-	-	-	-	2%	-	-
	YAH Community College	-	-	-	-	-	-	2%	-	-
	Religious Organizations	-	-	-	-	-	-	2%	-	-
	Volunteer welfare organizations	-	-	-	-	-	-	2%	-	-
	Community organizations	-	-	-	-	-	-	4%	-	-
	Aware, but did not specify	-	-	-	-	-	-	2%	-	-
	No, not aware of any organizations	-	-	-	-	-	-	26%	-	-
	Don't know	-	-	-	-	-	-	4%	-	-
	Refused	-	-	-	-	-	-	-	-	-

72

Q34US. Are you aware of any organizations in our country that work to improve the quality of life of older people and serve as an information source on aging issues?

BASED ON MULTIPLE MENTIONS.		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	-	-	-	-	-	-	-	-	74
	WEIGHTED BASE	-	-	-	-	-	-	-	-	50
	AARP	-	-	-	-	-	-	-	-	65%
	AFL-CIO	-	-	-	-	-	-	-	-	1%
	Alliance for Retired Americans	-	-	-	-	-	-	-	-	1%
	American Society on Aging	-	-	-	-	-	-	-	-	2%
	Area Agency on Aging	-	-	-	-	-	-	-	-	3%
	Association of Retired Americans	-	-	-	-	-	-	-	-	1%
	Better Business Bureaus	-	-	-	-	-	-	-	-	2%
	Catholic Charities	-	-	-	-	-	-	-	-	2%
	Civic Ventures	-	-	-	-	-	-	-	-	1%
	Commonwealth Foundation	-	-	-	-	-	-	-	-	1%
	Councils on Aging	-	-	-	-	-	-	-	-	9%
	Employer Retiree Association	-	-	-	-	-	-	-	-	1%
	Gerontological Society of America	-	-	-	-	-	-	-	-	1%
	Gray Panthers	-	-	-	-	-	-	-	-	1%
	Hospice	-	-	-	-	-	-	-	-	3%
	Institute for Women's Policy Research	-	-	-	-	-	-	-	-	1%
	Kaiser Family Foundation	-	-	-	-	-	-	-	-	1%
	Long-term Care Coalition	-	-	-	-	-	-	-	-	1%
	Lutheran Charities	-	-	-	-	-	-	-	-	1%
	Medicare Rights Center	-	-	-	-	-	-	-	-	1%
	National Alliance for Caregiving	-	-	-	-	-	-	-	-	2%
	National Committee to Preserve Social Security and Medicare	-	-	-	-	-	-	-	-	1%
	National Institutes of Health	-	-	-	-	-	-	-	-	3%
	Older Women's League	-	-	-	-	-	-	-	-	3%
	Red Cross	-	-	-	-	-	-	-	-	1%
	Robert Wood Johnson Foundation	-	-	-	-	-	-	-	-	1%
	Salvation Army	-	-	-	-	-	-	-	-	1%
	United Way	-	-	-	-	-	-	-	-	3%
	Urban Institute	-	-	-	-	-	-	-	-	1%
	Women's Research and Education Institute	-	-	-	-	-	-	-	-	1%
	Centers for Medicare and Medicaid Services	-	-	-	-	-	-	-	-	4%
	Social Security Administration	-	-	-	-	-	-	-	-	4%
	State government agencies	-	-	-	-	-	-	-	-	1%
	Labor unions	-	-	-	-	-	-	-	-	3%
	Professional associations	-	-	-	-	-	-	-	-	1%
	Religious organizations	-	-	-	-	-	-	-	-	4%
	Local organizations	-	-	-	-	-	-	-	-	4%
	Aware, but did not specify	-	-	-	-	-	-	-	-	9%
	No, not aware of any organizations	-	-	-	-	-	-	-	-	6%
	Don't know	-	-	-	-	-	-	-	-	3%
	Refused	-	-	-	-	-	-	-	-	3%

Q35. How familiar are you with the US organization called A-A-R-P, formerly known as the American Association of Retired Persons—very familiar, somewhat familiar, not too familiar, or not familiar at all?³⁰

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very familiar	11%	14%	-	-	10%	2%	6%	6%	50%
	Somewhat familiar	16%	28%	8%	8%	10%	2%	24%	8%	42%
	Not too familiar	20%	30%	32%	8%	20%	29%	8%	26%	4%
	Not familiar at all	50%	28%	60%	78%	60%	67%	62%	44%	3%
	Don't know	2%	-	-	4%	-	-	-	14%	-
Refused	1%	-	-	2%	-	-	-	2%	1%	

74

Q36. What is your overall impression of AARP—very favorable, somewhat favorable, not very favorable, or not favorable at all?

Based on respondents who are very familiar, somewhat familiar or not too familiar with AARP

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	210	36	20	8	20	16	19	20	71
	WEIGHTED BASE	187	36	20	8	20	16	19	20	48
	Very favorable	18%	19%	10%	27%	20%	-	21%	20%	21%
	Somewhat favorable	51%	36%	65%	36%	50%	37%	74%	45%	57%
	Not very favorable	5%	-	-	-	-	-	-	10%	14%
	Not favorable at all	1%	-	-	-	-	-	-	-	3%
	Don't know	23%	44%	25%	25%	30%	63%	5%	15%	-
Refused	3%	-	-	11%	-	-	-	10%	5%	

Q37. If an organization like AARP was established in our country, how helpful would this be to older people—very helpful, somewhat helpful, not too helpful, or not helpful at all?^{31,32}

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	349	50	50	50	50	49	50	50	-
	WEIGHTED BASE	350	50	50	50	50	50	50	50	-
	Very helpful	38%	24%	32%	59%	38%	35%	48%	30%	-
	Somewhat helpful	47%	52%	56%	34%	54%	55%	38%	42%	-
	Not too helpful	8%	12%	8%	4%	4%	4%	10%	16%	-
	Not helpful at all	2%	4%	-	2%	2%	4%	-	-	-
	Don't know	5%	8%	4%	2%	2%	2%	4%	10%	-
Refused	*	-	-	-	-	-	-	2%	-	

³⁰ Respondents in the US were asked "How familiar are you with A-A-R-P, formerly known as the American Association of Retired Persons—very familiar, somewhat familiar, not too familiar, or not familiar at all?"

³¹ Q37 through Q39 were not asked in the US.

³² Before being asked this question, respondents outside the US were read the following: AARP is a not-for-profit organization that works to improve the quality of life of older people who are age 50 or older. The organization works with the U.S. central government, local governments and businesses to be sure that older people have what they need for their health, finances and jobs. It also offers education programs, travel discounts and social opportunities for the older people who join. To join AARP, older people pay approximately \$12 a year, which is a low fee in the U.S.

Q38a. Why do you think the organization would be helpful. Is **it would provide knowledge and expertise** a big reason, moderate reason, small reason, or not a reason at all such an organization would be helpful?

Based on respondents who think an organization like AARP would be very helpful or somewhat helpful

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	297	38	44	46	46	44	43	36	-
	WEIGHTED BASE	298	38	44	46	46	45	43	36	-
	Big reason	55%	47%	55%	57%	54%	66%	70%	33%	-
	Moderate reason	37%	37%	43%	35%	28%	34%	26%	58%	-
	Small reason	7%	16%	2%	4%	17%	-	5%	8%	-
	Not a reason at all	-	-	-	-	-	-	-	-	-
	Don't know	1%	-	-	4%	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

75

Q38b. Why do you think the organization would be helpful. Is **it would raise awareness about aging** a big reason, moderate reason, small reason, or not a reason at all such an organization would be helpful?

Based on respondents who think an organization like AARP would be very helpful or somewhat helpful

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	297	38	44	46	46	44	43	36	-
	WEIGHTED BASE	298	38	44	46	46	45	43	36	-
	Big reason	64%	71%	82%	76%	67%	61%	49%	36%	-
	Moderate reason	30%	24%	16%	22%	28%	39%	37%	50%	-
	Small reason	4%	5%	-	2%	2%	-	12%	11%	-
	Not a reason at all	1%	-	-	-	-	-	2%	3%	-
	Don't know	*	-	-	-	2%	-	-	-	-
	Refused	*	-	2%	-	-	-	-	-	-

Q38c. Why do you think the organization would be helpful. Is **it would influence government policy** a big reason, moderate reason, small reason, or not a reason at all such an organization would be helpful?

Based on respondents who think an organization like AARP would be very helpful or somewhat helpful

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	297	38	44	46	46	44	43	36	-
	WEIGHTED BASE	298	38	44	46	46	45	43	36	-
	Big reason	39%	37%	41%	46%	46%	36%	33%	33%	-
	Moderate reason	50%	61%	45%	35%	46%	61%	49%	56%	-
	Small reason	7%	3%	11%	9%	7%	-	14%	8%	-
	Not a reason at all	2%	-	-	4%	-	-	5%	3%	-
	Don't know	2%	-	-	6%	2%	2%	-	-	-
	Refused	*	-	2%	-	-	-	-	-	-

Q39a. Why do you think the organization would not be helpful. Is **it would not work with our system of government** a big reason, moderate reason, small reason, or not a reason at all such an organization would not be helpful?

Based on respondents who think an organization like AARP would not be too helpful or not helpful at all

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	35	8	4	3	3	4	5	8	-
	WEIGHTED BASE	35	8	4	3	3	4	5	8	-
	Big reason	17%	38%	25%	34%	-	-	20%	-	-
	Moderate reason	32%	25%	50%	34%	-	27%	20%	50%	-
	Small reason	29%	25%	25%	-	33%	24%	20%	50%	-
	Not a reason at all	17%	13%	-	31%	33%	49%	20%	-	-
	Don't know	6%	-	-	-	33%	-	20%	-	-
Refused	-	-	-	-	-	-	-	-	-	

76

Q39b. Why do you think the organization would not be helpful. Is **we don't need any more organizations; there are too many already** a big reason, moderate reason, small reason, or not a reason at all such an organization would not be helpful?

Based on respondents who think an organization like AARP would not be too helpful or not helpful at all

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	35	8	4	3	3	4	5	8	-
	WEIGHTED BASE	35	8	4	3	3	4	5	8	-
	Big reason	26%	75%	-	34%	33%	27%	-	-	-
	Moderate reason	20%	13%	25%	-	-	-	-	63%	-
	Small reason	14%	-	50%	34%	-	24%	20%	-	-
	Not a reason at all	34%	13%	25%	31%	33%	49%	80%	25%	-
	Don't know	6%	-	-	-	33%	-	-	13%	-
	Refused	-	-	-	-	-	-	-	-	-

Q39c. Why do you think the organization would not be helpful. Is **the issues are too complicated for any one organization to tackle** a big reason, moderate reason, small reason, or not a reason at all such an organization would not be helpful?

Based on respondents who think an organization like AARP would not be too helpful or not helpful at all

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	35	8	4	3	3	4	5	8	-
	WEIGHTED BASE	35	8	4	3	3	4	5	8	-
	Big reason	29%	13%	100%	34%	67%	27%	-	13%	-
	Moderate reason	31%	38%	-	34%	-	-	20%	75%	-
	Small reason	14%	13%	-	-	-	24%	40%	13%	-
	Not a reason at all	25%	38%	-	31%	33%	49%	40%	-	-
	Don't know	-	-	-	-	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

Q40a. If AARP were to play a role in promoting the interests of older people in countries other than the United States, how helpful would the following activities be? Would **educating people in other countries about issues related to aging and retirement** be very helpful, somewhat helpful, not too helpful, or not helpful at all?^{33,34}

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	37%	36%	16%	56%	32%	57%	52%	20%	26%
	Somewhat helpful	45%	52%	56%	42%	52%	29%	46%	48%	37%
	Not too helpful	10%	12%	18%	2%	12%	6%	2%	20%	10%
	Not helpful at all	3%	-	4%	-	-	4%	-	6%	8%
	Don't know	3%	-	2%	-	4%	4%	-	6%	8%
	Refused	2%	-	4%	-	-	-	-	-	12%

77

Q40b. If AARP were to play a role in promoting the interests of older people in countries other than the United States, how helpful would the following activities be? Would **organizing conferences to bring together policy makers and aging experts from various countries** be very helpful, somewhat helpful, not too helpful, or not helpful at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	35%	48%	20%	53%	24%	45%	44%	14%	29%
	Somewhat helpful	48%	40%	54%	38%	56%	45%	44%	60%	45%
	Not too helpful	11%	8%	20%	7%	16%	4%	12%	16%	6%
	Not helpful at all	3%	4%	-	2%	2%	4%	-	4%	7%
	Don't know	2%	-	2%	-	2%	2%	-	6%	4%
	Refused	2%	-	4%	-	-	-	-	-	9%

Q40c. If AARP were to play a role in promoting the interests of older people in countries other than the United States, how helpful would the following activities be? Would **meeting with government policy makers to exchange information about aging and retirement** be very helpful, somewhat helpful, not too helpful, or not helpful at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	30%	34%	18%	43%	24%	33%	42%	14%	32%
	Somewhat helpful	57%	54%	66%	49%	60%	55%	54%	68%	48%
	Not too helpful	7%	10%	10%	8%	12%	4%	2%	6%	4%
	Not helpful at all	2%	2%	-	-	-	4%	2%	6%	6%
	Don't know	2%	-	2%	-	4%	4%	-	6%	3%
	Refused	1%	-	4%	-	-	-	-	-	7%

³³ Before being asked this question, respondents in the US were read the following: AARP is a not-for-profit organization that works to improve the quality of life of older people who are age 50 or older. The organization works with the federal government, local governments, and businesses to be sure that older people have what they need for their health, finances and jobs. It also offers education programs, travel discounts and social opportunities for the older people who join. To join AARP, older people pay approximately \$12 a year.

³⁴ Respondents in the US were asked "If AARP were to play a role in promoting the interests of older people in countries other than the United States, how helpful would the following activities be for other countries?"

Q40d. If AARP were to play a role in promoting the interests of older people in countries other than the United States, how helpful would the following activities be? Would **helping establish similar organizations in other countries** be very helpful, somewhat helpful, not too helpful, or not helpful at all?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Very helpful	29%	30%	20%	62%	26%	23%	36%	12%	25%
	Somewhat helpful	50%	58%	50%	32%	54%	55%	48%	58%	42%
	Not too helpful	12%	8%	20%	4%	12%	16%	12%	18%	7%
	Not helpful at all	4%	4%	4%	2%	2%	4%	2%	6%	8%
	Don't know	3%	-	2%	-	6%	2%	2%	6%	8%
	Refused	2%	-	4%	-	-	-	-	-	10%

78

D1. Sex

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	Male	74%	62%	86%	81%	90%	47%	72%	92%	60%
	Female	26%	38%	14%	19%	10%	53%	28%	8%	39%
	No answer	*	-	-	-	-	-	-	-	1%

D2. What is your age?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	423	50	50	50	50	49	50	50	74
	WEIGHTED BASE	400	50	50	50	50	50	50	50	50
	40 or less	30%	26%	52%	27%	20%	24%	42%	34%	12%
	41 to 50	30%	36%	26%	19%	16%	39%	28%	54%	20%
	51 to 60	30%	34%	20%	37%	36%	33%	24%	8%	50%
	Over 60	8%	2%	2%	11%	24%	2%	6%	4%	12%
	Refused	3%	2%	-	6%	4%	2%	-	-	7%

D3. Have you ever studied abroad?³⁵

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	349	50	50	50	50	49	50	50	-
	WEIGHTED BASE	350	50	50	50	50	50	50	50	-
	Yes	40%	50%	22%	26%	20%	45%	74%	40%	-
	No	60%	50%	78%	72%	76%	55%	26%	60%	-
	Refused	1%	-	-	2%	4%	-	-	-	-

³⁵ D3 through D5 were not asked in the US.

D4. Which country or countries did you study in?

Based on respondents who have studied abroad

BASED ON MULTIPLE MENTIONS		total	topline_country							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	138	25	11	13	10	22	37	20	-
	WEIGHTED BASE	138	25	11	13	10	22	37	20	-
	United States	45%	44%	36%	31%	60%	32%	49%	60%	-
	United Kingdom	31%	36%	27%	22%	20%	37%	38%	15%	-
	Australia	15%	8%	-	8%	10%	36%	22%	5%	-
	Canada	12%	36%	-	-	-	13%	11%	5%	-
	Sweden	5%	24%	-	-	-	5%	-	-	-
	India	4%	-	-	-	-	4%	14%	-	-
	Germany	4%	4%	9%	-	10%	-	5%	-	-
	France	2%	4%	-	-	-	-	5%	-	-
	Italy	2%	4%	-	7%	-	5%	-	-	-
	Singapore	2%	-	9%	8%	-	-	-	5%	-
	China	1%	-	-	-	10%	-	3%	-	-
	Japan	2%	-	-	10%	-	-	-	5%	-
	Netherlands	1%	-	-	14%	-	-	-	-	-
	Switzerland	2%	4%	-	-	-	5%	-	-	-
	Zimbabwe	2%	-	-	-	-	9%	-	-	-
	Austria	1%	4%	-	-	-	-	-	-	-
	Belgium	1%	-	-	-	-	-	-	5%	-
	Finland	1%	4%	-	-	-	-	-	-	-
	New Zealand	1%	4%	-	-	-	-	-	-	-
	Russia	1%	-	9%	-	-	-	-	-	-
	South Africa	1%	-	-	-	-	5%	-	-	-
	South Korea	1%	-	-	-	-	-	3%	-	-
	Thailand	1%	-	-	-	-	-	3%	-	-
	Don't know	-	-	-	-	-	-	-	-	-
	Refused	1%	-	9%	-	-	-	-	-	-

79

D5a. Have you ever traveled to the United States?

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	349	50	50	50	50	49	50	50	-
	WEIGHTED BASE	350	50	50	50	50	50	50	50	-
	Yes	63%	66%	38%	47%	56%	77%	88%	70%	-
	No	36%	34%	62%	49%	42%	23%	12%	30%	-
	Refused	1%	-	-	4%	2%	-	-	-	-

D5b. Was this within the past 10 years or earlier?

Based on respondents who have traveled to the United States

		total	COUNTRY							
		Total	AUS	CHI	IND	JPN	NZ	SIN	KOR	US
	UNWEIGHTED BASE	221	33	19	24	28	38	44	35	-
	WEIGHTED BASE	221	33	19	24	28	39	44	35	-
	Within past 10 years	84%	82%	63%	92%	79%	87%	89%	86%	-
	Earlier	16%	18%	37%	8%	21%	13%	11%	14%	-
	Don't know	-	-	-	-	-	-	-	-	-
	Refused	-	-	-	-	-	-	-	-	-

