

| COUNTRY Financial - March 2011 Trend Survey | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|-----------------------|-------|--------|--------|-------|-------|-------|-------|-------|-------|----------|-------|--------|-------------|-------------|-------------|-------------|--------------|---------|-------|-------|---------|-------|--------------|-------|-------------------------------|----------------------|-----------------------|---|---------------------------|----------|-------|--|
| | | Total | | | Gender | | | Age | | | | | Race | | | | Income | | | | | | Married | | Kids at Home | | Worked with Financial Planner | | | What Role You Play In Financial Decisions | | | | |
| | | Adults | Male | Female | 18-29 | 30-39 | 40-49 | 50-64 | 65+ | White | Black | Hispanic | Other | 0 | Under \$20K | \$20K-\$40K | \$40K-\$60K | \$60K-\$75K | \$75K-\$100K | \$100K+ | Yes | No | Yes | No | Yes | No | Not sure | Alone make decisions | Share decision making | Influence on decisions | Not involved in decisions | Not sure | | |
| Answered By 3,000 Adults | | 28.4% | 30.0% | 27.0% | 25.7% | 32.9% | 28.0% | 27.1% | 24.9% | 33.0% | 15.8% | 9.7% | 8.2% | 100.0% | 11.5% | 16.9% | 27.6% | 31.6% | 45.6% | 50.6% | 34.8% | 18.6% | 32.1% | 26.1% | 39.6% | 24.5% | 8.6% | 25.8% | 34.0% | 11.0% | 2.8% | 1.9% | | |
| Is it possible for a typical middle income family to save for a secure retirement? | | Yes | 28.4% | 30.0% | 27.0% | 25.7% | 32.9% | 28.0% | 27.1% | 24.9% | 33.0% | 15.8% | 9.7% | 8.2% | 100.0% | 11.5% | 16.9% | 27.6% | 31.6% | 45.6% | 50.6% | 34.8% | 18.6% | 32.1% | 26.1% | 39.6% | 24.5% | 8.6% | 25.8% | 34.0% | 11.0% | 2.8% | 1.9% | |
| | | No | 50.8% | 49.2% | 52.1% | 57.2% | 45.8% | 54.9% | 46.0% | 47.8% | 55.4% | 64.8% | 70.5% | 0.0% | 55.1% | 64.6% | 48.9% | 54.8% | 42.3% | 37.1% | 46.9% | 56.9% | 51.2% | 50.6% | 40.2% | 56.3% | 45.4% | 55.4% | 46.4% | 60.9% | 63.1% | 48.5% | 48.5% | |
| | | Not sure | 20.8% | 20.8% | 20.9% | 17.2% | 21.3% | 17.1% | 19.1% | 19.2% | 28.8% | 25.5% | 21.2% | 0.0% | 33.4% | 18.5% | 23.5% | 13.6% | 12.1% | 12.3% | 18.3% | 24.5% | 16.7% | 23.4% | 20.2% | 18.5% | 46.0% | 18.8% | 19.6% | 28.1% | 34.1% | 49.6% | | |
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| Answered By 2,253 Adults Who Are Not Yet Retired | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Adults | Male | Female | 18-29 | 30-39 | 40-49 | 50-64 | 65+ | White | Black | Hispanic | Other | 0 | Under \$20K | \$20K-\$40K | \$40K-\$60K | \$60K-\$75K | \$75K-\$100K | \$100K+ | Yes | No | Yes | No | Yes | No | Not sure | Alone make decisions | Share decision making | Influence on decisions | Not involved in decisions | Not sure | | |
| Have recent economic events caused you to increase the amount of money you put away for retirement, decrease the amount of | | Yes | 13.1% | 14.1% | 12.1% | 14.8% | 10.1% | 13.7% | 15.8% | 13.2% | 13.5% | 12.3% | 9.4% | 100.0% | 6.8% | 6.4% | 10.2% | 11.7% | 15.8% | 18.3% | 13.9% | 8.0% | 3.6% | 16.4% | 17.0% | 10.9% | 6.1% | 14.3% | 12.2% | 1.6% | 3.6% | 1.4% | | |
| | | Increase | 13.1% | 14.1% | 12.1% | 14.8% | 10.1% | 13.7% | 15.8% | 13.2% | 13.5% | 12.3% | 9.4% | 100.0% | 6.8% | 6.4% | 10.2% | 11.7% | 15.8% | 18.3% | 13.9% | 8.0% | 3.6% | 16.4% | 17.0% | 10.9% | 6.1% | 14.3% | 12.2% | 1.6% | 3.6% | 1.4% | | |
| | | Decrease | 42.9% | 37.2% | 47.8% | 42.2% | 41.4% | 40.8% | 47.3% | 37.6% | 41.8% | 47.8% | 41.7% | 0.0% | 56.5% | 62.6% | 55.7% | 39.0% | 33.0% | 26.7% | 41.8% | 48.9% | 44.7% | 41.1% | 38.7% | 45.9% | 43.6% | 44.7% | 44.8% | 32.9% | 52.9% | 44.0% | | |
| | | No impact | 41.2% | 46.4% | 36.6% | 39.5% | 46.1% | 42.3% | 34.5% | 43.0% | 42.4% | 35.4% | 43.7% | 36.3% | 0.0% | 29.6% | 28.0% | 33.7% | 43.3% | 50.9% | 53.7% | 42.2% | 38.1% | 42.2% | 40.1% | 41.3% | 40.5% | 43.6% | 36.4% | 41.4% | 58.3% | 41.3% | 49.2% | |
| | | Not sure | 2.9% | 2.2% | 3.4% | 3.6% | 2.4% | 3.2% | 2.3% | 6.3% | 2.3% | 4.5% | 7.5% | 0.0% | 7.3% | 3.0% | 0.4% | 5.9% | 0.2% | 1.2% | 2.2% | 5.0% | 3.4% | 2.3% | 3.0% | 2.6% | 6.8% | 4.6% | 1.7% | 7.2% | 2.2% | 5.5% | | |
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| Answered By 2,253 Adults Who Are Not Yet Retired | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Adults | Male | Female | 18-29 | 30-39 | 40-49 | 50-64 | 65+ | White | Black | Hispanic | Other | 0 | Under \$20K | \$20K-\$40K | \$40K-\$60K | \$60K-\$75K | \$75K-\$100K | \$100K+ | Yes | No | Yes | No | Yes | No | Not sure | Alone make decisions | Share decision making | Influence on decisions | Not involved in decisions | Not sure | | |
| Have recent economic conditions caused you to delay your retirement? | | Yes | 27.5% | 26.4% | 28.4% | 24.8% | 18.0% | 27.7% | 41.3% | 41.4% | 27.7% | 30.0% | 37.5% | 12.3% | 0.0% | 46.9% | 29.9% | 37.0% | 36.2% | 19.8% | 15.3% | 28.9% | 31.3% | 23.4% | 31.5% | 28.4% | 28.2% | 10.0% | 33.9% | 28.7% | 14.9% | 52.9% | 4.8% | |
| | | No | 49.8% | 48.8% | 50.6% | 50.2% | 52.4% | 55.2% | 43.4% | 48.2% | 52.4% | 41.4% | 40.8% | 42.7% | 100.0% | 25.4% | 45.2% | 42.0% | 49.9% | 58.4% | 65.3% | 51.9% | 41.0% | 52.4% | 47.2% | 54.8% | 47.9% | 32.6% | 42.6% | 53.4% | 41.2% | 37.8% | 18.7% | |
| | | Not sure | 22.7% | 24.8% | 20.9% | 24.9% | 29.7% | 17.1% | 15.4% | 10.4% | 20.0% | 28.6% | 21.7% | 45.0% | 0.0% | 27.8% | 24.9% | 21.0% | 13.9% | 19.3% | 19.1% | 27.6% | 24.2% | 21.3% | 16.9% | 23.9% | 57.4% | 23.4% | 18.0% | 43.9% | 9.3% | 76.5% | | |
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| Answered By 2,253 Adults Who Are Not Yet Retired | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Adults | Male | Female | 18-29 | 30-39 | 40-49 | 50-64 | 65+ | White | Black | Hispanic | Other | 0 | Under \$20K | \$20K-\$40K | \$40K-\$60K | \$60K-\$75K | \$75K-\$100K | \$100K+ | Yes | No | Yes | No | Yes | No | Not sure | Alone make decisions | Share decision making | Influence on decisions | Not involved in decisions | Not sure | | |
| How confident are you in your current retirement savings plan? | | Very confident | 16.2% | 17.7% | 14.9% | 14.3% | 14.2% | 16.5% | 18.9% | 28.0% | 19.3% | 6.8% | 4.5% | 6.9% | 0.0% | 4.2% | 6.3% | 7.7% | 10.3% | 18.2% | 39.1% | 19.6% | 8.3% | 14.1% | 18.3% | 27.3% | 11.4% | 11.2% | 18.9% | 15.8% | 8.5% | 0.0% | 3.1% | |
| | | Somewhat confident | 37.4% | 35.1% | 39.3% | 33.2% | 39.7% | 38.6% | 37.1% | 33.1% | 40.2% | 29.7% | 27.5% | 26.8% | 100.0% | 5.7% | 40.2% | 38.4% | 38.0% | 47.1% | 41.7% | 39.6% | 28.4% | 37.1% | 37.7% | 45.9% | 33.2% | 12.5% | 28.1% | 42.1% | 20.6% | 10.7% | 4.4% | |
| | | Not very confident | 31.1% | 30.1% | 31.9% | 33.4% | 31.4% | 29.7% | 29.8% | 28.7% | 28.8% | 37.0% | 46.8% | 34.4% | 0.0% | 53.8% | 36.1% | 41.1% | 35.3% | 24.2% | 15.5% | 30.0% | 35.3% | 34.4% | 27.8% | 20.4% | 36.6% | 37.2% | 30.5% | 31.4% | 55.6% | 49.0% | 24.8% | |
| | | Not at all confident | 11.4% | 11.2% | 11.5% | 10.5% | 11.3% | 14.0% | 11.5% | 5.8% | 8.5% | 18.6% | 21.2% | 23.5% | 0.0% | 28.1% | 12.7% | 7.4% | 14.2% | 8.4% | 3.2% | 7.7% | 22.0% | 11.4% | 11.3% | 6.0% | 13.5% | 24.3% | 17.3% | 8.0% | 14.7% | 40.3% | 23.0% | |
| | | Not sure | 4.0% | 5.8% | 2.4% | 8.6% | 3.4% | 1.2% | 2.6% | 4.5% | 3.2% | 7.9% | 0.0% | 8.1% | 4.7% | 5.4% | 2.2% | 2.0% | 0.5% | 3.2% | 6.1% | 2.9% | 5.0% | 0.4% | 5.3% | 14.8% | 5.3% | 2.7% | 0.7% | 0.0% | 44.7% | | | |
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| Answered By 2,253 Adults Who Are Not Yet Retired | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Adults | Male | Female | 18-29 | 30-39 | 40-49 | 50-64 | 65+ | White | Black | Hispanic | Other | 0 | Under \$20K | \$20K-\$40K | \$40K-\$60K | \$60K-\$75K | \$75K-\$100K | \$100K+ | Yes | No | Yes | No | Yes | No | Not sure | Alone make decisions | Share decision making | Influence on decisions | Not involved in decisions | Not sure | | |
| How much money do you estimate you will need before you can retire? | | Less than \$500K | 15.5% | 15.4% | 15.6% | 7.8% | 8.3% | 18.6% | 27.5% | 35.8% | 17.5% | 7.5% | 7.1% | 14.1% | 0.0% | 22.4% | 25.6% | 21.2% | 14.1% | 13.2% | 5.8% | 15.9% | 16.2% | 10.1% | 20.8% | 15.3% | 15.9% | 6.8% | 17.4% | 16.3% | 6.3% | 13.9% | 1.7% | |
| | | \$500K-\$750K | 22.4% | 20.5% | 24.1% | 27.9% | 19.0% | 20.5% | 24.7% | 23.2% | 22.8% | 6.4% | 23.8% | 100.0% | 19.8% | 31.2% | 21.9% | 23.5% | 24.6% | 16.3% | 21.2% | 23.8% | 21.6% | 23.3% | 21.6% | 23.4% | 6.2% | 21.7% | 22.5% | 14.8% | 36.0% | 17.1% | | |
| | | \$750K to \$1 Million | 25.9% | 25.7% | 26.1% | 26.6% | 34.4% | 21.5% | 16.8% | 13.3% | 23.0% | 35.1% | 48.4% | 25.0% | 0.0% | 21.0% | 22.6% | 23.6% | 28.3% | 29.6% | 30.3% | 26.8% | 20.4% | 31.4% | 20.6% | 24.5% | 26.3% | 36.5% | 22.4% | 25.9% | 44.2% | 1.3% | 14.4% | |
| | | More than \$1 Million | 18.5% | 24.4% | 13.5% | 11.2% | 24.3% | 21.8% | 14.7% | 13.3% | 19.9% | 11.6% | 11.4% | 22.2% | 0.0% | 5.6% | 4.3% | 14.8% | 19.4% | 24.9% | 40.8% | 21.6% | 14.2% | 21.0% | 16.1% | 26.7% | 15.5% | 10.6% | 20.9% | 18.8% | 14.4% | 40.7% | 23.4% | |
| | | Not sure | 17.6% | 14.0% | 20.7% | 26.6% | 14.0% | 17.6% | 16.3% | 18.0% | 16.4% | 22.9% | 26.7% | 14.9% | 0.0% | 31.2% | 16.3% | 18.5% | 14.6% | 7.7% | 6.8% | 14.6% | 25.4% | 16.0% | 19.2% | 11.8% | 18.9% | 39.9% | 17.6% | 16.4% | 20.3% | 8.2% | 43.4% | |
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| Answered By 2,253 Adults Who Are Not Yet Retired | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Adults | Male | Female | 18-29 | 30-39 | 40-49 | 50-64 | 65+ | White | Black | Hispanic | Other | 0 | Under \$20K | \$20K-\$40K | \$40K-\$60K | \$60K-\$75K | \$75K-\$100K | \$100K+ | Yes | No | Yes | No | Yes | No | Not sure | Alone make decisions | Share decision making | Influence on decisions | Not involved in decisions | Not sure | | |
| Have you sought professional advice as to how much money you would need to retire? | | Yes | 30.5% | 30.3% | 30.7% | 14.1% | 29.8% | 34.9% | 41.0% | 33.5% | 34.1% | 18.5% | 8.2% | 29.0% | 100.0% | 11.6% | 20.6% | 30.0% | 33.5% | 38.7% | 38.4% | 16.4% | 29.7% | 31.3% | 75.6% | 10.0% | 19.0% | 23.3% | 37.7% | 18.3% | 1.3% | 25.7% | | |
| | | No | 62.8% | 62.7% | 62.9% | 74.1% | 63.1% | 62.8% | 54.8% | 57.4% | 61.6% | 63.7% | 80.7% | 62.7% | 0.0% | 78.3% | 73.5% | 58.1% | 63.5% | 60.2% | 49.4% | 58.2% | 73.0% | 66.0% | 59.6% | 23.3% | 84.1% | 20.4% | 68.5% | 59.6% | 54.9% | 96.7% | 41.1% | |
| | | Not sure | 6.7% | 7.1% | 6.4% | 11.8% | 7.1% | 2.3% | 4.2% | 9.1% | 4.4% | 17.9% | 11.1% | 8.3% | 0.0% | 10.1% | 5.9% | 11.9% | 3.0% | 1.1% | 3.3% | 10.5% | 4.3% | 9.1% | 1.1% | 5.9% | 60.7% | 8.2% | 2.7% | 26.8% | 2.0% | 33.2% | | |