

## **An Enquiry for Statistical Data related to Retirement Protection System**

A comprehensive set of statistical data would be of crucial importance so that assessment of the sustainability of the existing CSSA Scheme as well as viability of the alternatives in retirement protection system is possible.

At present, the Census and Statistics Department has issued three set of publications in relation to the elderly population and population projection, including:

- *2006 Population By-census Thematic Report: Older Persons*, February 2008;
- *Socio-demographic Profile, Health Status and Self-care Capability of Older Persons*, August 2009;
- *Hong Kong Population Projections, 2010-2039*, July 2010.

The above-mentioned materials provide a general picture on the ageing population and the change in future population of Hong Kong. However, they are far from enough for answering the queries concerning retirement protection, such as their coverage on latest changes of the local community is far from satisfactory. Given the imminence of the need on retirement protection across the community, the Government should act as a facilitator, therefore indispensable in providing relevant data in aspects including:

- Population flow in particular the inflow of Mainland adults and Mainland immigrants in recent years;
- Ability of the existing CSSA Scheme and retirement protection systems to address the needs arising from the anticipated growth of elderly population.

It would be helpful if the Government could provide detailed statistical data as follows:

### **I Dependency Ratio and Population Projection**

#### **A. Demographic characteristics**

##### **1. Population**

- Number and annual growth rate of older persons since 1961

- Number and percentage of older persons by age (quinquennium age groups), sex and marital status, 1996, 2001, 2006 and 2011

## **2. Place of birth and duration of residence in Hong Kong**

- Older persons by duration of residence (in quinquennium) in Hong Kong and by place of birth, 1996, 2001, 2006 and 2011
- (New) Middle-aged population aged 45 to 64 by duration of residence (in quinquennium) in Hong Kong and by place of birth, 1996, 2001, 2006 and 2011

## **3. Education** (“Secondary/Sixth Form” as a group split into two including “Lower secondary” and “Upper secondary”)

- Number and percentage of older persons by sex, age (quinquennium age groups) and education attainment (highest level completed), 1996, 2001, 2006 and 2011
- (New) Number and percentage of middle-aged population aged 45 to 64 by sex, age (quinquennium age groups) and education attainment (highest level completed), 1996, 2001, 2006 and 2011
- Number and percentage of older persons (quinquennium age groups) by sex, place of birth and education attainment (highest level completed), 1996, 2001, 2006 and 2011
- (New) Number and percentage of middle-aged population aged 45 to 64 (quinquennium age groups) by sex, place of birth and education attainment (highest level completed), 1996, 2001, 2006 and 2011

## **4. Ethnicity**

- Number and percentage of older persons by ethnicity, 1996, 2001, 2006 and 2011
- (New) Number and percentage of middle-aged population aged 45 to 64 by ethnicity and age (quinquennium age groups), 1996, 2001, 2006 and 2011

## **B. Dependency Ratio**

### **1. Age Boundary of Elder Persons**

#### a. Present situation

“60 years old or above” and “65 years old or above”

- 65 years old or above
  - Table 3.2. Dependency Ratios, 1961 to 2006, *2006 Population By-census Thematic Report: Older Persons*, Notes, p.17.
- 60 years old or above
  - *Socio-demographic Profile, Health Status and Self-care Capability of Older Persons*, para.3.2
  - age criteria for application of CSSA Scheme

#### b. Proposals

- 65 years old or above
  - Reasons
    - Ageing population and improvement in health conditions of Hong Kong people
    - Current Elderly CSSA recipients aged 60 to 64 can apply other types of assistance

### **2. Definition of Dependency Ratio**

#### a. Economically active population

- Current: Population aged 15 to 64
- Proposal: Population aged 20 to 64
  - Reasons: 12-year free education and increase in opportunities to higher education

#### b. Elderly dependency ratio

- Current: 60 or above

- Proposal: 65 or above
  - Reason: Same as above

c. Child dependency ratio

- Current: below 15
- Proposal: below 20
  - Reason: Same as above

**3. Fertility Rate**

- Number of live births whose father or mother is Hong Kong Permanent Resident (PR) and respective birth rate
- Number of live births whose parents are Mainlanders and respective birth rate (Type II babies)
- (New) Number of live births whose parents are non-PR foreigners and respective birth rate
- Number of live births and respective birth rate

Remarks: Parents of Hong Kong-born Babies, including Mainlanders and non-PR foreigners, might become the local new immigrants.

**4. Economically active population**

a. Mainland Chinese who obtained Hong Kong Residency

- (New) Annual figure of One-way Permit holders by sex and age (quinquennium age groups) since 1997
- Annual figure of entrants under Capital Investment Entrant Scheme by sex, age (quinquennium age groups) and years of residence in Hong Kong
- (New) Annual figure of entrants under Quality Migrant Admission Scheme by sex, age (quinquennium age groups) and years of residence in Hong Kong
- (New) Annual figure of “non-local graduates” by sex, age (quinquennium age groups) and years of residence in Hong Kong
- (New) Annual figure of entrants of Admission Scheme for Mainland Talents and Professionals by sex, age (quinquennium age groups) and years of residence in Hong Kong

- (New) Annual figure of dependants by sex, age (quinquennium age groups) and years of residence in Hong Kong
- b. Non-Chinese who obtained Hong Kong Residency
  - (New) Annual figure of “non-local graduates” by sex, age (quinquennium age groups) and years of residence in Hong Kong
  - (New) Annual figure of entrants under General Employment Policy by sex, age (quinquennium age groups) and years of residence in Hong Kong
  - (New) Annual figure of entrants under Capital Investment Entrant Scheme sex, age (quinquennium age groups) and by years of residence in Hong Kong
  - (New) Annual figure of dependants by sex, age (quinquennium age groups) and years of residence in Hong Kong

## **II. Sustainability of the CSSA Scheme and the Proposed Universal Old Age Pension Scheme**

### **A. Sustainability of the CSSA Scheme**

- Current CSSA Standard Rates, Supplements and Special Grants for elderly persons
- Number of recipients of and expenditure on Elderly CSSA, Supplements and Special Grants for elderly persons aged 60 or above by age (quinquennium age groups) and sex
- (New) Number of recipients of and expenditure on Elderly CSSA, Supplements and Special Grants for elderly persons aged 65 or above by age (quinquennium age groups) and sex
- Number of recipients of and expenditure on Portable CSSA Scheme for elderly persons aged 60 or above by Guangdong Province and Fujian Province
- (New) Number of recipients of and expenditure on Portable CSSA Scheme for elderly persons aged 65 or above by Guangdong Province and Fujian Province
- (New) Number of recipients of and expenditure on CSSA for elderly persons aged 60 or above by monthly allowance (\$2,501-3,000; 3,001-3,500; ...), age (quinquennium age groups) and sex
- (New) Government estimation on the number of CSSA recipients in the

future

**B. Elder persons without financial supports from their children**

**1. Number of adults without children**

- Number of never-married adults by age (quinquennium age groups) and sex
- Number of married women who never succeed in first order live birth by age (quinquennium age groups) and marital status
- (New) Number of married man (his spouse aged 45 or over) without children by age (quinquennium age groups)

**2. Divorcees without financial supports from their children**

- Divorcees aged 45 or over without custody of their children
  - (New) Number of divorcees with custody of their children  
Remarks: The parent without custody of his/her children is assumed to have an estranged relation with his/her children. These offspring, when grown up, might not be willing to support their estranged parent (half the number of respective divorced couples)
  - (New) Number of divorcees without children

**3. Composition of older persons residing in domestic households**

- Number of elder persons living in domestic household
  - Living alone
  - Living with spouse and
    - with children
    - not with children
    - Sub-total
  - Living with child(ren) only
  - Others
  - Sub-total
- Number of elder persons living in non-domestic household

#### **4. Financial condition of elder persons' children**

- Older persons residing in domestic households by number of their children living in Hong Kong
- Domestic households with older persons by monthly domestic household income, 1996, 2001, 2006 and 2011
- Median monthly income of domestic households with older persons by household size, 1996, 2001, 2006 and 2011
- Institutional elderly by number of their children living in Hong Kong
- Number and percentage of institutional elderly by whether receiving CSSA

#### **C. Elder persons' ability of self-supporting**

##### **1. Economically active and inactive older persons**

- Number of working older persons and respective labour force participation rates by sex and age, 1996, 2001, 2006 and 2011
- Number and percentage of working older persons by economic activity status, 1996, 2001, 2006 and 2011
- Number and percentage of economically inactive older persons by economic activity status, sex and age (quinquennium age groups), 1996, 2001, 2006 and 2011

##### **2. Proportion of working elder persons by occupation, percentage and income level**

- Managers and administrators
- Professionals
- Associate professionals
- Clerks
- Service workers and shop sales workers
- Craft and related workers
- Plant and machine operators and assemblers
- Elementary occupations
- Skilled agricultural and fishery workers; and occupations not classifiable

**3. Retirement protection**

- Older persons by whether having retirement protection/by type of retirement protection
- (New) Number and percentage of adults aged 45 to 64 (quinquennium age groups) by whether having retirement protection/by type of retirement protection

**4. Return of MPF Schemes**

- (New) Amount of accrued benefits per person by duration of subscription (in quinquennium)
- Annual figure of average management costs of MPF funds
- (New) Severance payments and long service payments from accrued benefits of the MPF Schemes: annual amount and percentage of accrued benefits being offset and number of employees affected
- Number and percentage of MPF holders affected by amount of accrued benefits being offset per case since 2001
- Highest amount of accrued benefits being offset per case by years and average loss by individual participants since 2001

**5. Income of the elderly**

- Working older persons by monthly income (including median income), main employment and sex, 1996, 2001, 2006 and 2011
- Older persons by whether having monthly personal income/ by amount of monthly personal income
- Older persons who had monthly personal income by selected source of income
- (New) Number of older persons with CSSA as their sole source of income
- (New) Number of older persons with OAA as their sole source of income
- (New) Number of older persons without any source of income

**6. Assets**

- Number of older persons by type of assets owned
- Number of older persons by value of assets owned (excluding value of



owner-occupied properties)

**7. Daily expense**

- Number and percentage of older persons by amount of monthly expenditure and by whether having income other than CSSA and OAA
- Number of older persons by expected financial means to maintain daily living after retirement
- (New) Middle-aged population aged 45 to 64 (quinquennium age groups) by expected financial means to maintain daily living after retirement

**III. Others**

- A. For the sake of simplicity, some of the questions above did not ask for sub-categorization of age and sex, which is in fact very informative. Hence, data for older persons should be broken into quinquennium age groups (e.g. 60-64, 65-69, ..... ) and cross-tabulated by male and female, if possible.
- B. Foreign domestic helpers should be excluded from the statistical information to be provided by the Government.

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