

# HRS 2013 Mail Study

It is very important that the questions in this questionnaire be answered by the person to whom the questionnaire is addressed.

If the addressee is unable to complete the questionnaire alone:

It can be filled out by someone who knows this person well enough to answer the questions.

If neither the addressee nor another person is able to complete the questionnaire:

Please return the questionnaire, with a short note of explanation, in the enclosed, prepaid envelope.



#### ABOUT THIS QUESTIONNAIRE

This questionnaire is a part of the Health and Retirement Study. We greatly value your past participation in the HRS, and we hope that you will find this questionnaire interesting to complete. As always, your answers are extremely important to us. Please remember that your participation is *voluntary* and that you may skip over any questions that you would prefer not to answer.

A Department of Health and Human Services Certificate of Confidentiality covers this research in order to help ensure your privacy. This certificate can help protect the investigators from being forced to release any research information that identifies you. Please note that we must report credible evidence of serious harm or abuse to any person to the authorities, but this questionnaire <u>does not ask any</u> questions about such topics.

#### FILLING OUT THIS QUESTIONNAIRE

It is very important that the questions be answered by the person to whom the questionnaire is addressed (or by someone who knows this person well enough to answer the questions instead, if the addressee is unable to complete the questionnaire alone). At the end of this questionnaire, please record in the space provided the name of the person who completed the questions.

If you have any questions about the questionnaire, please feel free to call us at

# 1-855-647-6769.

#### THANK YOU!



Conducted by: The Survey Research Center at the University of Michigan.

Sponsored by: The Social Security Administration and the National Institute

on Aging.

#### PLEASE ANSWER THE QUESTIONS BY:

Marking a box like this: ✓
Or writing an answer on a line like this: Answer
Sometimes you will find an instruction telling you  which questions to answer next like this:  Yes  No Go to A13 on page 5.
Please use a #2 pencil or black ball point pen.

#### **Section A**

In the first part of this questionnaire section, we ask you to estimate how much time you spent doing various activities during the last week. For each activity, please tell us the number of hours you spent doing that activity. If you haven't done that activity at all in the last week, then mark the "0 hours" box to the right. If you spent less than an hour doing an activity, tell us how much of an hour you did spend (such as ¾ or ½).

#### PLEASE NOTE:

- Sometimes people do more than one activity at a time -- for example, listening to music while preparing a meal. That is, one hour of listening to music while preparing a meal would count as one hour of *listening to music* and also one hour of *preparing meals*.
- Similarly, one behavior might represent more than one activity included in the list. For example, e-mailing friends is both *using the computer* and *communicating with friends*. Record that time for both of the activities.
- Please include the time you spent traveling to and from an activity when estimating the amount of time spent on that activity.
- We realize that last week or last month might have been unusual, and that your answers may not reflect your typical activity patterns. It is important, however, to report the actual amount of time spent on each activity, rather than the usual amount.
- If you did not do an activity in the last week, please check the "0 hours" box.

How many hours did you actually spend **LAST WEEK**...

		Hours spent last week		No time spent last week
<b>A1</b>	Watching programs or movies/videos on TV	hours last week	OR	□ 0 hours
<b>A2</b>	Reading newspapers or magazines	hours last week	OR	□ 0 hours
A3	Reading books	hours last week	OR	□ 0 hours
<b>A4</b>	Listening to music	hours last week	OR	□ 0 hours
<b>A</b> 5	Sleeping and napping (including at night)	hours last week	OR	□ 0 hours
<b>A6</b>	Walking	hours last week	OR	□ 0 hours
<b>A7</b>	Participating in sports or other exercise activities	hours last week	OR	□ 0 hours
<b>A8</b>	Visiting in-person with friends, neighbors, or relatives	hours last week	OR	□ 0 hours
A9	Communicating by telephone, letters, e-mail, Facebook, Skype, or other media with friends, neighbors, or relatives	hours last week	OR	□ 0 hours
A10	Working for pay	hours last week	OR	□ 0 hours

		Hours spent last week		No time spent last week
A11	Using the computer	hours last week	OR	□ 0 hours
A12	Praying or meditating	hours last week	OR	□ 0 hours
A13	House cleaning	hours last week	OR	□ 0 hours
A14	Washing, ironing, or mending clothes	hours last week	OR	□ 0 hours
A15	Yard work or gardening	hours last week	OR	□ 0 hours
A16	Shopping or running errands	hours last week	OR	□ 0 hours
A17	Preparing meals and cleaning-up afterwards	hours last week	OR	□ 0 hours
A18	Personal grooming and hygiene, such as bathing and dressing	hours last week	OR	□ 0 hours
A19	Caring for pets	hours last week	OR	□ 0 hours
A20	Physically showing affection for others through hugging, kissing, etc.	hours last week	OR	□ 0 hours

Now think about the **LAST MONTH.** How many hours did you spend last month...

		Hours spent last month		No time spent last month
A21	Helping friends, neighbors, or relatives who did not live with you and did not pay you for the help	hours last month	OR	□ 0 hours
A21.5	Taking care of grandchildren	hours last month	OR	□ 0 hours
A22	Doing volunteer work for religious, educational, health-related, or other charitable organizations	hours last month	OR	□ 0 hours
A23	Attending religious services	hours last month	OR	□ 0 hours
A24	Attending meetings of clubs or religious groups	hours last month	OR	□ 0 hours
A25	Taking care of finances or investments, such as banking, paying bills, balancing the checkbook, doing taxes, etc.	hours last month	OR	□ 0 hours
A26	Treating or managing an existing medical condition of your own	hours last month	OR	□ 0 hours
A27	Playing cards or games, or solving puzzles	hours last month	OR	□ 0 hours

				Hours s	_	No time spent last month	
A28	Attending concerts, a visiting museums	movies,	or lectures, or	ho	ours nth OF	R □ 0 hours	
A29	Singing or playing a	musical	instrument	ho	ours nth OF	□ 0 hours	
A30	hours				/ 1 L	d □ 0 hours	
A31	31 Doing home improvements, including painting, redecorating, or making homehours repairslast month				( ) k	R □ 0 hours	
A32	Working on, maintain car(s) or vehicle(s)	ning, or	cleaning your	ho	ours onth	<b>t</b> □ 0 hours	
A33	A33 Dining or eating outside the home (not related to business or work)  last me				ours onth	R □ 0 hours	
A34.	<b>A34.</b> Thinking of your meals <b>last week</b> , how much time did you spend eating meals last week?						
	Hours la	st week					
<b>A35.</b> Please think of how much time you spend seeing doctors, nurses, therapists or other health care providers about your own health, or going to the pharmacy for your own medications: During the past year, about how much time did you spend on average on these activities, including travel time?							
	hours per week	OR	hours per month	OR	———las	hours t year	

A36.	• •	ime last	week treating or ma	naging 1	the medical condition of			
	another person? No Yes_		<ul> <li>Who was that person (check all that apply)</li> <li> spouse</li> <li> your child, step child or grandchild</li> <li> your parent, parent-in-law or grand parent</li> </ul>					
			other, specify					
			ow many hours did Hours last w	-	nd in total last week?			
A37.		oills, incl	uding dealing with i	insuranc	nd on average paying or e claims? If you helped include that time.			
	hours per week	OR	hours per month	OR	hours last year			
A38.	How many days in t trips related to busin			you awa	y from home on overnight			
	Days							
A39.	How many days in trips or vacations no			-	y from home on overnight			
	Days							
Now	think about everyth	hing you	do during waking	hours:				
A40.	How often do you u	se your r	nind in what you do	? ( <b>Che</b> c	ek one.)			
	<ul><li>Rarely</li><li>Sometime</li><li>Often</li><li>Almost all</li><li>Uncertain</li></ul>	the time						
		,	J					

A41. How often do you use your body in what you do? (Check one.)
Rarely Sometimes Often Almost all the time Uncertain, can't say
<b>A42.</b> How often are your activities done with other people? (Check one.)
Rarely Sometimes Often Almost all the time Uncertain, can't say
A43. How often do your activities benefit other people? (Check one.)
Rarely Sometimes Often Almost all the time Uncertain, can't say  A44. Were the questions in Section A answered by the person to whom this questionnaire was addressed, or did someone else answer for that person? (Check
one.)
Yes, the questions were answered by the person to whom the questionnaire was addressed The questions were answered by that person's spouse or partner The questions were answered by that person's son or daughter The questions were answered by someone else: Please say if you are a relative, a friend, a care provider, or what:
A45. Approximately, how long did it take you to complete Section A?
Minutes
End of Section A.

Now think about everything you do during waking hours:

## **Section B:**

We would like to know how families spend their income. If you think that somebody else in your household might be more knowledgeable about your household's spending, please, ask that person to help you in answering these questions.

Please indicate whether your household made any of these purchases in the past 12 months

- To the best of your ability, provide the purchase price.
- If you can't remember the exact amount, please give us your best estimate.

If you bought more than one item in a category:

- Please indicate the total amount you spent on all items in that category.
- Please include purchases by all members of your household, that is, by you or anyone living with you.

<b>B</b> 1.	. In the past twelve months, has your household leased or purchased an automobile or
	truck? (If it was a lease, we are asking about new long-term leases).

If so, what were the make, model, year and price of the vehicle(s) you purchased or leased?

(Car 1):_				\$ 	
	Make	Model	Year	Price	New or used?
(Car 2):_				\$ 	
	Make	Model	Year	Price	New or used?
(Car 3):_				\$ 	
	Make	Model	Year	Price	New or used?

<b>B2</b> . In the past	twelve months, has your household purchased a refrigerator?
	Yes → About how much was the purchase price? \$ No
<b>B3</b> . In the past dryer?	twelve months, has your household purchased a washing machine and/or
	Yes → About how much was the purchase price? \$ No
-	twelve months, has your household purchased a dishwasher?  Yes → About how much was the purchase price? \$  No
-	twelve months, has your household purchased a television?  Yes → About how much was the purchase price? \$  No
	twelve months, has your household purchased a computer?  Yes → About how much was the purchase price? \$  No

We'd also like you to provide your best estimate of your household spending for the following categories. For the items on this page, please enter your annual cost in the provided spaces in the column "Amount spent in last 12 months." If you did not spend money on a specific item or service in the last 12 months, then check the "No money spent on this in last 12 months" box.

		Amount spent in last 12 months		No money spent on this in last 12 months
В7	Homeowner's or renter's insurance	\$	OR	□ \$0
B8	Property taxes	\$	OR	□ \$0
В9	Vehicle insurance	\$	OR	□ \$0
B10	Vehicle maintenance: parts, repairs, and servicing	\$	OR	□ \$0
B11	Health insurance: out- of-pocket, including Medicare supplemental insurance	\$	OR	□ \$0
B12	Trips and vacations: including transportation, accommodations, and recreational expenses on trips	\$	OR	□ \$0

		Amount spent in last 12 months		No money spent on this in last 12 months
B13	Home repairs and maintenance: materials your household bought directly	\$	OR	□ \$0
B14	Home repairs and maintenance services: hiring costs including materials they provided	\$	OR	□ \$0
B15	Household furnishings and equipment: such as furniture, floor coverings, small appliances, miscellaneous household equipment	\$	OR	□ \$0
B16	Contributions to religious, educational, charitable, or political organizations	\$	OR	□ \$0
B17	Cash or gifts to family and friends outside your household: including alimony and child support payments	\$	OR	□ \$0

For the next set of items we have included two time periods so that you can estimate your spending in the way that is easiest for you for each category: the amount you spend on a monthly basis, OR the amount you spent in the last 12 months. For example, if it is easiest for you to think about what you spend on electricity in monthly terms, then please report how much you spent each month. If you did not spend money on a specific item or service in the last 12 months, then check the "No money spent on this in last 12 months" box.

		Amount spent monthly		Amount spent in last 12 months		No money spent on this in last 12 months
B18	Mortgage	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B19	Rent	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B20	Electricity	\$ per month	OR	\$in last 12 months	OR	□ \$0
B21	Water	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B22	Heating fuel for the home	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B23	Telephone, cable, internet	\$ per month	OR	\$ in last 12 months	OR	<b>\$</b> 0
B24	Car payments: interest & principal	\$ per month	OR	\$ in last 12 months	OR	□ \$0

The next block has items that some people do not purchase on a regular basis. Please use the time period that best reflects your spending over the last 12 months to estimate what you actually spent.

### For example:

- If your household's spending on clothing in the last year was irregular or concentrated in just a few months then please report your best estimate of the total amount your household spent on clothing in the last 12 months.
- If your household's spending on clothing was fairly evenly distributed over the year, then you can choose whether to report the average monthly amount or the total amount spent in the last 12 months, whichever you find easier.

Again, if you did not spend money on a specific item or service in the last 12 months, then check the "No money spent on this in last 12 months" box.

If you bought an item only occasionally or on an as-needed basis, then please give your best estimate of what you spent in the last 12 months.

		Amount spent monthly		Amount spent in last 12 months		No money spent on this in last 12 months
B25	Housekeeping supplies: cleaning and laundry products	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B26	Housekeeping, dry cleaning and laundry services: hiring costs for housekeeping or home cleaning, and amount spent at dry cleaners and laundries	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B27	Gardening and yard supplies: yard, lawn and garden products	\$ per month	OR	\$ in last 12 months	OR	□ \$0

		Amount spent monthly		Amount spent in last 12 months		No money spent on this in last 12 months
B28	Gardening and yard services: hiring costs including materials they provided	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B29	Clothing and apparel: including footwear, outerwear, and products such as watches or jewelry	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B30	Personal care products and services: including hair care, shaving and skin products, amount spent at hair dresser, manicure, etc.	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B31	Prescription and nonprescription medications: out-of- pocket cost, not including what's covered by insurance	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B32	Health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care	\$ per month	OR	\$ in last 12 months	OR	□ \$0

		Amount spent monthly		Amount spent in last 12 months		No money spent on this in last 12 months
В33	Medical supplies: out-of-pocket cost, not including what's covered by insurance	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B34	Tickets to movies, sporting events, and performing arts	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B35	Sports: including gym, exercise equipment such as bicycles, skis, boats, etc.	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B36	Hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc.	\$ per month	OR	\$ in last 12 months	OR	□ \$0

For the items below we have included three time periods so that you can estimate your spending in the way that is easiest for you for each category. For example, if it is easiest for you to think about what your household spends in a usual week on food and beverages, then please enter the amount in the first column.

Again, if you did not spend money on a specific item or service in the last 12 months, then check the "No money spent on this in last 12 months" box. If you bought an item only occasionally or on an as-needed basis, then please give your best estimate of what you spent in the last 12 months.

		Amount spent weekly		Amount spent monthly		Amount spent in last 12 months		No money spent on this in last 12 months
B37	Food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores	\$ per week	OR	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B38	Dining and/or drinking out: items in restaurants, cafes, and diners, including take-out food	\$ per week	OR	\$ per month	OR	\$ in last 12 months	OR	□ \$0
B39	Gasoline	\$ per week	OR	\$ per month	OR	\$in last 12 months	OR	□ \$0

<b>B39.5</b> We have just asked you about purchases by all members of your household, that is, by you or anyone living with you.
INCLUDING YOURSELF, how many people are living in your household?
Now think of your household's TOTAL spending last year. Please do NOT include any money that you saved or that you invested, including real estate investments, like home purchases.
Compare this amount spent with your total household after-tax income (i.e. income that remains after income taxes were paid or withheld). In your household income, include any earnings from work, any interest or dividends, any pension, annuity or Social Security income, and any other money that your household may have received.
B40. Last year, my household spent: (Check one.)
<ul> <li> More than its income → About how much more? \$</li> <li> Less than its income → About how much less? \$</li> <li> About the same as its income</li> <li> Uncertain, can't say</li> </ul>
<b>B41</b> . Suppose next year –and only next year– you were to find your household with 20% more income than normal, what would you do with the extra income? ( <b>Check one.</b> )
<ul> <li>Save or invest all of it → Go to Question B43</li> <li>Spend or donate all of it</li> <li>Spend and save some. → I would spend% &amp; save% of it</li> <li>Uncertain, can't say → Go to Question B43</li> </ul>
<b>B42</b> . If you chose to spend all or part of it, what would you spend the extra income on? (Check all that apply.)
<ul> <li>Trips, travel or vacations</li> <li>Clothing</li> <li>Eating out / food and beverages</li> <li>New home, home repairs or household items</li> <li>Entertainment, sports and hobbies</li> <li>Automobile expenses</li> </ul>

agine that next year –and only next year– you were to find yourself with s household income. What would you do? ( <b>Check one.</b> )
 Not cut my spending at all → Go to Question B45 on page 18  Cut my spending by the whole 20%  Cut my spending by some, but not the whole 20% → By what percent would you cut spending?%  Uncertain, can't say → Go to Question B45 on page 18  nose to spend less, then on what items would you spend less? (Check all
 Trips, travel or vacations Clothing Eating out / food and beverages New home, home repairs or household items

<b>B45</b> . We would like to understand more ab	out spe	nding in retir	ement. Are yo	ou retired?	
Yes → Complete BOX A		No <b>→ Com</b> p	lete BOX B		
BOX A – Retired:	BOX	B – Not Ret	tired:		
a. How did your TOTAL spending change with retirement?		-	pect your TOT e with retirem		
Stayed the same $\rightarrow$ Go to $\mathbf{c}$		Stay the	same 🗲 Go to	f	
Increased		Increase			
Decreased		Decrease	e		
b. By how much?	e. By	how much?			
%		%			
c. For the items below, check (✓) whether the spending increased, decreased or stayed the same in retirement:	f. For the items below, check ( ) whether you expect spending to increase, decrease or stay the same in retirement:			,	
B46.		Increase(d)	Decrease(d)	Stay(ed) the same	
a. Trips, travel, or vacations					
b. Clothing					
c. Eating out / food and beverages					
d. New home, home repairs, or household	litems				
e. Entertainment, sports, and hobbies					
f. Automobile expenses					
<ul> <li>B47. Were the questions in Section B answered by the person to whom this questionnaire was addressed, or did someone else answer for that person? (Check one.)</li> <li>Yes, the questions were answered by the person to whom the</li> </ul>					
questionnaire was addressed The questions were answered by that person's spouse or partner The questions were answered by that person's son or daughter The questions were answered by someone else: Please say if you are relative, a friend, a care provider, or what:					

<b>B48</b> . Approximately, how long di	id it take you to complete Section B?
Minutes	
	End of Section B.

# **Section C:**

•	ly laid off, unemployed and looking for work, a homemaker, or what? (Check all that apply.)
<ul> <li>Working now</li> <li>Temporarily laid off</li> <li>Unemployed and look</li> <li>Disabled</li> <li>Retired</li> <li>Homemaker</li> <li>Other, specify</li> <li>Uncertain, can't say</li> </ul>	
C2. Are you currently married, living have you never been married? (Check	with a partner, separated, divorced, widowed, or <b>c one.</b> )
Living with a partner Separated Divorced Widowed Never married	<ul> <li>→ Continue with C2a</li> <li>→ Go to C3 pg 21</li> </ul>
· · · · · · · · · · · · · · · · · · ·	rtner) Did your household spend any money on ear, outerwear, and products such as watches or
Yes → What fra	your spouse or partner uses? % other household members use? %
No	

C3. Please add any comments that you wish in the space below:
<b>C4.</b> Were the questions in Section C answered by the person to whom this questionnaire was addressed, or did someone else answer for that person? ( <b>Check one.</b> )
Yes, the questions were answered by the person to whom the questionnaire was addressed
The questions were answered by that person's spouse or partner
The questions were answered by that person's son or daughter
The questions were answered by someone else: Please say if you are a relative, a friend, a care provider, or what:
C5. Approximately, how long did it take you to complete Section C?
Minutes

Thank you for your participation in this important survey!