**Health and Retirement Study (HRS)**

**HRS website**: <http://hrsonline.isr.umich.edu/index.php>

#### HRS Data Book: *Growing Older in America: The Health and Retirement Study*

#### <http://hrsonline.isr.umich.edu/index.php?p=dbook>

This publication is designed to inform the national retirement discussion as the population so dramatically ages. Since its launch in 1992, the HRS has painted a detailed portrait of America’s older adults, helping us learn about this growing population’s physical and mental health, insurance coverage, financial situations, family support systems, work status, and retirement planning. Through its unique and in-depth interviews with a nationally representative sample of adults over the age of 50, the HRS provides an invaluable, growing body of multidisciplinary data to help address the challenges and opportunities of aging.

**HRS Objectives:**

* Explain the antecedents and consequences of retirement
* Examine the relationships among health, income, and wealth over time
* Examine life cycle patterns of wealth accumulation and consumption
* Monitor work disability
* Examine how the mix and distribution of economic, family, and program resources affect key outcomes, including retirement, health declines, and institutionalization

**HRS Design**:

* Designed over 18 months by a team of leading economists, demographers, psychologists, health researchers, survey methodologists, and policymakers, the study set out to provide each of these sciences with ongoing data collected in a methodologically sound and sophisticated way.
* The HRS is a national longitudinal study based on core biennial interviews of nearly 20,000 individuals representing the US population over age 50. (Mixed mode of collection includes in-person, telephone, self-administered, and internet resources)
* Hispanics and African-Americans were oversampled.
* Every six years, the HRS enrolls a new birth cohort in order to maintain a steady-state representation of the over 50 US population.
* Baseline interviews with existing birth cohorts were conducted in 1992, 1993, 1998, and 2004, with plans to enroll the next 6-year cohort in 2010.
* Participants are followed through the life course with biennial surveys and supplemental data collections.
* Data are de-identified and made publicly available at no charge to users.
* HRS also collects supplemental data - typically, in the off-years. Some examples of off-year supplemental studies are:
  + Human Capital Mail Survey (HUMS)
  + Consumption and Activities Mail Survey (CAMS)
  + Diabetes Mail Survey
  + Demographics and Memory Study (ADAMS) – partnership with Duke University

**Sub-samples within HRS:**

* The original HRS sample consists of individuals born between 1931 and 1941. At the baseline in 1992, a total of 15,497 individuals were eligible for interviews. This total included persons identified in the household screening, plus their spouses or partners regardless of year of birth. Of those identified in this way, interviews were obtained with 12,654 respondents (7,704 households), for an overall response rate of 81.4%.
* The second sample was generated for what began as a separate study: Asset and Health Dynamics among the Oldest Old (AHEAD). This sample consists of individuals born in 1923 or before. For the AHEAD sample, interviews were obtained with 8,222 respondents (6,046 different households), a response rate of 80.4%.
* The HRS and AHEAD studies were merged, with a single interview schedule in 1998.
* Additional sub-samples include
  + Children of the Depression Age (CODA) – added in 1998
  + War Baby (WB) – added in 1998
  + Early Baby Boomer (EBB) – added in 2004
  + Mid Baby Boomer (MBB) – added in 2010

**Core Content Areas:**

* Health
  + Physical/psychological self-report, conditions, disabilities; Cognitive testing; Behaviors (smoking, drinking, exercise)
* Health Services
  + Utilization, expenditure, insurance, out-of-pocket spending
* Labor Force
  + Employment status/history, earnings, disability, retirement, type of work
* Economic Status
  + Income by source, wealth by asset type, capital gains/debt, consumption; Linkage to pensions, Social Security earnings/benefit history
* Family Structure
  + Extended family, proximity, transfers to/from of money, time, housing

**Data Availability:**

* A simple registration process on line will allow interested researchers to download HRS public use data files, at no charge.
* Available files, detailed on the website, include early and final release datasets, cross wave files, imputation files and researcher contributions.
* HRS, through support from the Social Security Administration, also provides access to a cleaned and ready-to-use version of the public data, known as the RAND-HRS Data. RAND-HRS Data are available as a single file which includes the public use data from all waves of the HRS, or separate files for each wave of data. RAND-HRS Data are distributed in SAS, STATA, and SPSS formats, with accompanying documentation. These files are maintained at RAND, and made available for download via the HRS website.
* On-line support to data users is available on the HRS website. See Documentation Products at <http://hrsonline.isr.umich.edu/meta/index.html> or email your data question to [HRSQuest@isr.umich.edu](mailto:HRSQuest@isr.umich.edu)