## HRS 2022 -- SECTION P: EXPECTATIONS
## COMMENTED VERSION -- 07/27/2021

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**\*\*\* NOTE FOR REVIEWERS \*\*\***
**ALL CHANGES FOR THE 2022 WAVE INSTRUMENT ARE FLAGGED WITH**
**#@ LOCATED ON THE RIGHT SIDE OF THE CHANGED ITEM OR SERIES.**
**THUS, ALL CHANGES CAN BE LOCATED BY SEARCHING FOR #@ IN THE**
**DESIGN CHANGE COMMENTS COLUMN.**

**CHANGES IN ITEMS THAT WERE IN THE 2020 INSTRUMENT APPEAR IN RED.**

**NEW QUESTIONS AND ASSOCIATED NEW BRANCHPOINTS, ETC., APPEAR IN**
**BLUE SANDWICHED BETWEEN ROWS OF \*\*\*\*\*\*\*\*\*\*\*\*\*\*\* .**

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**NOTE ABOUT BRANCHPOINTS:**

**WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX,**
**THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.**

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**NOTE ABOUT COLORS:**

**ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.**

**THE CORE INTERVIEW IS DOCUMENTED USING BLACK TEXT, BUT BLACK**
**TEXT CAN ALSO APPLY TO THE WEB INTERVIEW WHEN THERE ARE NO**
**DIFFERENCES FROM THE CORE.**

**\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

**NOTE ABOUT BOLD/UNDERLINE TEXT:**

**ANY QUESTION THAT IS UNDERLINED IN THE B&A WILL APPEAR IN BOLD IN**
**CAPI AND WILL BE UNDERLINED FOR CAWI.**

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**NOTE ABOUT NON-RESPONSE FLOW:**

ANY QUESTION THAT IS ASKED BUT LEFT WITHOUT A RESPONSE IN CAWI INTERVIEWS WILL FOLLOW THE SAME PATH AS A REFUSAL FOR THAT QUESTION, UNLESS OTHERWISE SPECIFIED.

**\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

This Is A **Reinterview R** (Z076=1);
This Is A **New Interview R** (Z076=5)

This is a **Financial R** (X007=1)
This is a **Family R** (X007=2)
This is a **Financial & Family R** (X007=3)
This is a **Non-Financial & Non-Family R** (X007=4)

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**MAJOR FLOW CONTROL: OTHER SECTION VARIABLES**

This Is A **Self Interview** (A009=1);
This Is A **Proxy Interview** (A009={2 Or 3}) Or (A009 Not 1);
**Proxy Reporter Is Surviving Spouse** (A009=2);
**Proxy Reporter is Non-Spouse** (A009=3)

R'S **Age** (Per A019)

R is living in a **Nursing Home or Skilled-Nursing Facility** (A237=1)
R is living in a **Memory Care Center** (A237=2)
R is living in an **Assisted Living Facility** (A237=3)
R is living in a **Rehabilitation Center** (A237=4)
R is living in a **Retirement Community** (A237=5)
R is living in a **Senior Living Facility** (A237=6)
R is living in a **Rest Home** (A237=7)
R is living in a **Hospital** (A237=8)
R is living in a **Hospice** (A237=9)
R Is living in an **Other Type of Facility** (A237=10)

R Is **Working For Pay** (J020=1)
R Is **Not Currently Working** (J020=5)
R **Works For Someone Else** (J021=1)
R Is **Self Employed** (J021=2)

R **OWNS MAIN RESIDENCE** (H004=1, or H008=(1 or 2),  or H011=1, or H014=(1 or 3))

R **Currently Receives Social Security Benefits** (J478=1)

R **Expects To Receive Social Security Benefits In The Future** (J479=1)
R **Currently Looking For A Job** ({J505 Or J517}=1)


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**EXTERNAL VARIABLES USED FOR FILLS**

This R is **Male** (X060=1)
This R is **Female** (X060=2)

This R is Married (X065=1)
This R is **Living With a Partner** (X065=3)
This R is **UnCoupled** (X065=6)


~~X083  Random variable (Values 1 through 100) is used to generate fills variabl~~


~~X523_Random_1To8_New08_SecP  (Values 1  through 8)  is used to generate~~
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**ALTERNATE WAVE FLOW**

**Note: Alternate Wave questions are always asked of new interview Rs. They are asked of core reinterview Rs only in alternate waves. They were last asked of core reinterview Rs in 2018 and will be asked again in 2022.**

**P041 officially became an alternate wave field in 2016.  Before that it was being commented in or out each wave. P195_altwave uses the same logic as E165_altwave but it is opposite on/off (when E165 is on P195 is off).**


**ALTERNATE WAVE VARIABLE IS NOT SET TO ASK QUESTIONS (AltWave Variable >0):**
P195 = ((Init.A504_CurrWaveNdx - 6) MOD 2) > 0


**\*\*IN ~~2020~~ 2022 ALTERNATE WAVE VARIABLE P195_ALTWAVE IS SET TO ~~NOT~~ ASK QUESTION \*\***

*Note: any respondent who refuses or does not know how to answer the first three "0-100" questions of section P, will not be asked any further questions in this section. The actual sequence of questions varies and depends on specific skips. The counter variables used to track responses are P155 (for number of questions asked) and P156 (for number of "don't know" or "refused" responses). P009 is the summary variable for this count and keeps track of whether or not the respondent's first three answers, whatever they may be, are all "don't know" or "refused". P009 takes the following values: 0 = could/would not answer probability questions; 1 = can answer probability questions.*

*Note: with the complete reprogramming in Blaise in 2002, questions were given their permanent field names. However, in subsequent waves certain question series were moved within section p, yet they retained their original field names. Furthermore, when a new question was added, it was given the next unused field name. The result is that, in section P in particular, the field names of many questions do not reflect their order within the section. At the end of the section, a table is provided to aid in locating questions cited in jumps.*

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P002 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO SECTION T

IF THIS IS A PROXY INTERVIEW (A009={2 or 3}), GO TO SECTION Q

P002

Next we would like to ask your opinion about how likely you think various events might be. When we ask a question we'd like for you to give us a number from 0 to 100, where "0" means that you think there is absolutely no chance, and "100" means that you think the event is absolutely sure to happen.

For example, no one can ever be sure about tomorrow's weather, but if you think that rain is very unlikely tomorrow, you might say that there is a 10 percent chance of rain. If you think there is a very good chance that it will rain tomorrow, you might say that there is an 80 percent chance of rain.

1. CONTINUE
DK
RF

Next we would like to ask your opinion about how likely you think various events might be. When we ask a question we'd like for you to give us a number from 0 to 100, where "0" means that you think there is absolutely no chance, and "100" means that you think the event is absolutely sure to happen.

For example, no one can ever be sure about tomorrow's weather, but if you think that rain is very unlikely tomorrow, you might say that there is a 10 percent chance of rain. If you think there is a very good chance that it will rain tomorrow, you might say that there is an 80 percent chance of rain.

[INSTR: SELECT "NEXT" TO CONTINUE.]

P166 BRANCHPOINT: IF THIS IS A FINANCIAL R (X007={1 or 3}), and R OWNS MAIN RESIDENCE ({{H004 or H011}=1} or {H008={1 or 2}} or {H014={1 or 3}}), CONTINUE ON TO P166

OTHERWISE, GO TO P005

P166

We are interested in how the value of your home will change in the future.

On the same scale from 0 to 100, what do you think is the percent chance that by next year at
this time your home will be worth [more/less (per P196)] than it is today?

Absolutely
Absolutely
No chance    0.................................................................100    Certain

PERCENT_____
DK
RF

We are interested in how the value of your home will change in the future.

On the same scale from 0 to 100, what do you think is the percent chance that by next year at
this time your home will be worth [more/less (per P196)] than it is today?

Absolutely
Absolutely
No chance    0......................................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

*Note: A preloaded random variable (X083) with values from '0' to '100' is used to generate the fill for question P166. The P196 fill is created using a mod function which returns a '0' or '1'. A '0' is returned if there is no remainder and a '1' if there is a remainder. if there is a remainder then the P196 fill is assigned 'more', if not P196 fill is assigned 'less'. The (temporary) FLP166 fill was changed to a (permanent) P196 variable so the fill value can later be used as data.*

P168

By this time next year, what is the percent chance that the value of your
home will have [gained/fallen] (per 170) in value by more than
[10/20/30/40] percent compared to what it is worth today?

Absolutely
Absolutely
No chance   0............................................................100   Certain

PERCENT_____
DK
RF

By this time next year, what is the percent chance that the value of your home will have [gained/fallen] (per 170) in value by more than [10/20/30/40] percent compared to what it is worth today?

Absolutely
Absolutely
No chance    0.............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

NOTE: The first fill of variable P168 is 1 = fallen or 2 = gained and is recorded at P170. The P170 fill is based on the response at P166, if P166 = 0% or 100%.

If (P166 is 0% and the P196 (P166 fill) is 'more' ) or (P166 is 100% and P196 is 'less' ) then P170 is assigned 1. fallen.

If (P166 is 100% and the P196 is 'more' ) or (P166 is 0% and P196 is 'less' ) then P170 is assigned 2. gained.

If P166 is not 0% or 100% then the P170 fill is based on the the preloaded value of the random variable X523. If X523=1, 2, 3, or 4 then the P170 fill is assigned 1. fallen.

If X523=5, 6, 7, or 8 then the P170 fill is assigned 2. gained.

The second fill in P168 is always based on the preload value of X523 and the fill takes the value of 10%, 20%,30%, or 40%. So if:

X523 = 1 , then the second fill will be 40%,
X523 = 2, then the second fill will be 30%,
X523 = 3 , then the second fill will be 20%,
X523 = 4 , then the second fill will be 10%,
X523 = 5 , then the second fill will be 10%,
X523 = 6 , then the second fill will be 20%,
X523 = 7, then the second fill will be 30%,
X523 = 8 , then the second fill will be 40%,

P005

Think about an inheritance you [and your [husband/wife/partner]] might leave [, but not including any inheritance you might leave to each other].

Including property and other valuables that you might own, what are the chances that you (and your [husband/wife/partner]) will leave an inheritance totaling $10,000 or more?

Absolutely
Absolutely
No chance    0..............................................................100    Certain


PERCENT_____

0 ............. GO TO  P007
DK
RF


Think about an inheritance you [and your [husband/wife/partner]] might leave [, but not including any inheritance you might leave to each other].

Including property and other valuables that you might own, what are the chances that you (and your [husband/wife/partner]) will leave an inheritance totaling $10,000 or more?

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____


P006 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R DID NOT GIVE CHANCES OF LEAVING AN INHERITANCE (P005={DK or RF}), GO TO P014 BRANCHPOINT

P006

And what are the chances that you [and your [husband/wife/partner]] will leave an inheritance totaling $100,000 or more?

[INSTR: INCLUDE PROPERTIES AND OTHER VALUABLE ITEMS AS WELL AS MONEY

Absolutely
Absolutely
No chance     0...............................................................100     Certain

PERCENT_____
DK
RF


And what are the chances that you [and your [husband/wife/partner]] will leave an inheritance totaling $100,000 or more?

[INSTR: PLEASE INCLUDE PROPERTIES AND OTHER VALUABLE ITEMS AS WELL AS MONEY]

   Absolutely
Absolutely
   No chance     0...............................................................100     Certain

   [INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

      NUMBER _____


P059 BRANCHPOINT: IF R DID NOT SAY THERE WAS A CHANCE OF LEAVING AN INHERITANCE (P006={0 or DK or RF}), GO TO P014 BRANCHPOINT


P059

And what are the chances that you [and your [husband/wife/partner]] will leave an inheritance totaling $500,000 or more?

[INSTR: INCLUDE PROPERTIES AND OTHER VALUABLE ITEMS AS WELL AS MONEY]

         Absolutely                                                    Absolutely
Absolutely
     No chance    0................................................................100    Certain


PERCENT_____
DK
RF


And what are the chances that you [and your [husband/wife/partner]] will leave an inheritance totaling $500,000 or more?

[INSTR: PLEASE INCLUDE PROPERTIES AND OTHER VALUABLE ITEMS AS WELL AS MONEY]

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

     NUMBER _____


P007 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

ELSE, GO TO P014 BRANCHPOINT

P007

And what are the chances that you [and your [husband/wife/partner]] will leave any inheritance?

[INSTR: INCLUDE PROPERTIES AND OTHER VALUABLE ITEMS AS WELL AS MONEY.]

      Absolutely
Absolutely
   No chance    0...............................................................100    Certain

PERCENT_____
DK
RF

And what are the chances that you [and your [husband/wife/partner]] will leave any inheritance?

[INSTR: PLEASE INCLUDE PROPERTIES AND OTHER VALUABLE ITEMS AS WELL AS MONEY]

      Absolutely
Absolutely
   No chance    0...............................................................100    Certain

 [INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P014 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R DID NOT REPORT THAT IS WORKING NOW (J020 NOT 1) or R IS SELF EMPLOYED (J021=2), GO TO P016 BRANCHPOINT

P014

Sometimes people are permanently laid off from jobs that they want to keep.

On the same scale from 0 to 100 (where 0 means absolutely no chance and 100 means absolutely certain), what are the chances that you will lose your job during the next year?

INSTR:
0      Absolutely no chance
100   Absolutely certain

PERCENT_____
DK
RF

Sometimes people are permanently laid off from jobs that they want to keep.

On the same scale from 0 to 100 (where 0 means absolutely no chance and 100 means absolutely certain), what are the chances that you will lose your job during the next year?

 [INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

    NUMBER _____

P009 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

P015

Suppose you were to lose your job this month.

What do you think are the chances that you could find an equally good job in the same line of work within the next few months?

[INSTR:
0      Absolutely no chance
100   Absolutely certain]

PERCENT_____
DK
RF

~~Suppose you were to lose your job this month.~~

~~What do you think are the chances that you could find an equally good job in the same line of work within the next few months?~~

~~[INSTR: ENTER ANY NUMBER FROM 0 TO 100 WHERE "0"  MEAN ABSOLUTELY NO CHANCE AND "100" MEANS ABSOLUTELY CERTAIN.]~~

~~NUMBER _____~~

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P016 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R IS CURRENTLY EMPLOYED (J020=1), GO TO P017 BRANCHPOINT

P016

(On this same 0 to 100 scale), what are the chances that you will be working for pay at some time in the future?

Absolutely
Absolutely
No chance    0..............................................................100    Certain

PERCENT_____
DK
RF

On this same 0 to 100 scale, what are the chances that you will be working for pay at some time in the future?

Absolutely
Absolutely
No chance    0..............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

Number _____

P017 BRANCHPOINT:  IF P009 = 0 GO TO P056_AssistP

IF R IS {62 OR OLDER} (A019 >=62), GO TO P018 BRANCHPOINT

IF R DID NOT GIVE CHANCES OF WORKING FOR PAY, (P016 = { DK or RF}) , GO TO P018 BRANCHPOINT

IF R SAID 0 PERCENT CHANCE WILL BE WORKING FOR PAY (P016 = 0) , GO TO P020 BRANCHPOINT

P017

IF R WORKS FOR SOMEONE ELSE (J021=1):
Thinking about work in general and not just your present job, what do you think the chances are that you will be working full-time after you reach age 62?

OTHERWISE:
What do you think the chances are that you will be working full-time after you reach age 62?

Absolutely
Absolutely
No chance    0...............................................................100    Certain


PERCENT_____
DK
RF

IF R WORKS FOR SOMEONE ELSE (J021=1):
Thinking about work in general and not just your present job, what do you think the chances are that you will be working full-time after you reach age 62?

OTHERWISE:
What do you think the chances are that you will be working full-time after you reach age 62?

   Absolutely
Absolutely
  No chance   0.................................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

   NUMBER _____

P123 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R DID NOT SAY IS 50 PERCENT CHANCE THAT WILL BE WORKING FULL-TIME (P017 NOT 50), GO TO P018 BRANCHPOINT

P123

Do you think that it is about equally likely that you will be working full-time as it is that you will not be working full-time, or are you just unsure about the chances?

1. EQUALLY LIKELY
2. UNSURE
DK
RF

P018 BRANCHPOINT: IF P009 =0 GO TO P056_AssistP

IF R IS {65 OR OLDER} (A019 =>65), GO TO P181 BRANCHPOINT

IF R DID NOT GIVE CHANCES OF WORKING FOR PAY, (P016 = { DK or RF}) , GO TO P198 BRANCHPOINT

IF R SEES NO CHANCE AT ALL TO WORK AT 62 or R DID NOT GIVE CHANCES OF WORKING AT 62 (P017=0, DK, RF), GO TO P198 BRANCHPOINT

P018

IF R WORKS FOR SOMEONE ELSE (J021=1) and R IS {62 OR OLDER} (A019 >= 62):
Thinking about work in general and not just your present job, what do you think the chances are that you will be working full-time after you reach age 65?

OTHERWISE:
And what about the chances that you will be working full-time after you reach age 65?

```
    Absolutely
Absolutely
    No chance    0............................................................100    Certain
```

PERCENT_____
996 ALREADY AGE 65
DK
RF

IF R WORKS FOR SOMEONE ELSE (J021=1) and R IS {62 OR OLDER} (A019 >= 62):
Thinking about work in general and not just your present job, what do you think the chances are that you will be working full-time after you reach age 65?

OTHERWISE:
And what about the chances that you will be working full-time after you reach age 65?

```
    Absolutely
Absolutely
    No chance    0............................................................100    Certain
```

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

    NUMBER _____

P198 BRANCHPOINT: IF R IS {62 OR OLDER} (A019 >61), GO TO P199 BRANCHPOINT

IF R SAYS CHANCES OF WORKING FULL TIME AFTER AGE 62 IS 100% (P017=100) OR CHANCES OF WORKING FULL TIME AFTER THE AGE OF 65 IS 100% (P018=100), GO TO P199 BRANCHPOINT

P198

What are the chances that you will be doing any work for pay after you reach age 62?

    Absolutely
Absolutely
  No chance    0................................................................100   Certain

PERCENT_____
DK
RF

What are the chances that you will be doing any work for pay after you reach age 62?

    Absolutely
Absolutely
  No chance    0................................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

  NUMBER _____

P199 BRANCHPOINT: IF R IS {65 OR OLDER} (A019 >=65), GO TO P181 BRANCHPOINT

IF R SAYS CHANCES OF WORKING FULL TIME AFTER AGE 65 IS 100% (P018=100) GO TO P181 BRANCHPOINT

IF R SEES NO CHANCE OF DOING ANY WORK FOR PAY AFTER AGE 62 (P198=0) OR DID NOT GIVE CHANCES OF DOING ANY WORK FOR PAY AFTER AGE 62 (P198=DK,RF), GO TO P020 BRANCHPOINT

P199

What are the chances that you will be doing any work for pay after you reach age 65?

    Absolutely

Absolutely

   No chance    0..................................................................100   Certain


PERCENT_____

DK

RF

What are the chances that you will be doing any work for pay after you reach age 65?

    Absolutely

Absolutely

   No chance    0..................................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

    NUMBER _____


P181 BRANCHPOINT: IF R IS {70 OR OLDER} (A019 >= 70), GO TO P020 BRANCHPOINT

IF R SEES NO CHANCE OR DID NOT GIVE CHANCES OF DOING ANY WORK FOR PAY AFTER AGE 62 (P198=0,DK,RF), GO TO P020 BRANCHPOINT

IF R SEES NO CHANCE OR DID NOT GIVE CHANCES OF DOING ANY WORK FOR PAY AFTER AGE 65 (P199=0,DK,RF), GO TO P020 BRANCHPOINT


P181

What are the chances that you will be doing <u>any work</u> for pay after you reach age 70?

        Absolutely
Absolutely
    No chance    0................................................................100    Certain


PERCENT_____
DK
RF

What are the chances that you will be doing <u>any work</u> for pay after you reach age 70?

        Absolutely
Absolutely
    No chance    0................................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

    NUMBER _____


P182 BRANCHPOINT: IF R IS {70 OR OLDER} (A019 >= 70), GO TO P020
BRANCHPOINT
IF P009 = 0 GO TO P056_AssistP

IF R SEES NO CHANCE or DID NOT GIVE CHANCES OF WORKING FULL TIME AT
62 (P017=0, Dk,Rf) or
IF R SEES NO CHANCE or DID NOT GIVE CHANCES OF WORKING FULL TIME AT
65 (P018=0, Dk, Rf) or
IF R SEES NO CHANCE or DID NOT GIVE CHANCES OF WORKING AT 70
(P181=0, DK, RF),
GO TO P020 BRANCHPOINT


P182

IF R WORKS FOR SOMEONE ELSE (J021=1):
Thinking about work in general and not just your present job, what do you think the chances are that you will be working full-time after you reach age 70?

OTHERWISE:
What do you think the chances are that you will be working <u>full-time</u> after you reach age <u>70</u>?

   Absolutely
Absolutely
  No chance    0.................................................................100   Certain

PERCENT_____
DK
RF

IF R WORKS FOR SOMEONE ELSE (J021=1):
Thinking about work in general and not just your present job, what do you think the chances are that you will be working full-time after you reach age 70?

OTHERWISE:
What do you think the chances are that you will be working full-time after you reach age 70?

   Absolutely
Absolutely
  No chance    0.................................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

   NUMBER _____

P020 BRANCHPOINT: IF R DID NOT REPORT THAT IS CURRENTLY LOOKING FOR A JOB ({J505 and J517} NOT 1), GO TO P028 BRANCHPOINT

P020

You told us earlier that you were looking for a new job.

On this 0 to 100 scale, what are the chances that you will find a job like the one you're looking for within the next few months?

       Absolutely
Absolutely
   No chance    0..............................................................100    Certain

PERCENT_____
DK
RF

You told us earlier that you were looking for a new job.

On this 0 to 100 scale, what are the chances that you will find a job like the one you're looking for within the next few months?

       Absolutely
Absolutely
   No chance    0..............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

   NUMBER _____

P028 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R IS {65 OR OLDER} (A019 >= 65), GO TO P029 BRANCHPOINT

P028

What is the percent chance that you will live to be 75 or more?

Absolutely
Absolutely
  No chance   0...............................................................100   Certain

PERCENT_____
DK
RF

What is the percent chance that you will live to be 75 or more?

Absolutely
Absolutely
  No chance   0...............................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P102 BRANCHPOINT:  IF P009 = 0 GO TO P056_AssistP

IF R DID NOT SAY 50 PERCENT CHANCE THAT WILL LIVE TO 75 YEARS OF AGE (P028 NOT 50), GO TO P029 BRANCHPOINT

IF R SAID 0 PERCENT CHANCE THAT WILL LIVE TO 75 YEARS OF AGE (P028=0), GO TO P175 BRANCHPOINT P032 BRANCHPOINT

P102

Do you think that it is about equally likely that you will die before 75 as it is that you will live to 75 or beyond, or are you just unsure about the chances?

1. EQUALLY LIKELY
2. UNSURE
DK
RF

P029 BRANCHPOINT:  IF P009 = 0 GO TO P056_AssistP

IF R IS {90 OR OLDER} (A019 >= 90), GO TO P175 P032 BRANCHPOINT

P029

What is the percent chance that you will live to be

[85 (IF AGE IS LESS THAN 65)/
80 (IF AGE IS 65-69)/
85 (IF AGE IS 70-74)/
90 (IF AGE IS 75-79)/
95 (IF AGE IS 80-84)/
100 (IF AGE IS 85-89)]

or more?

   Absolutely
Absolutely
  No chance   0...............................................................100   Certain


PERCENT_____
DK
RF

What is the percent chance that you will live to be

[85 (IF AGE IS LESS THAN 65)/
80 (IF AGE IS 65-69)/
85 (IF AGE IS 70-74)/
90 (IF AGE IS 75-79)/
95 (IF AGE IS 80-84)/
100 (IF AGE IS 85-89)]

or more?

   Absolutely
Absolutely
  No chance   0...............................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

   NUMBER _____

P157 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R IS YOUNGER THAN 65 (A019 < 65), GO TO P175 P032 BRANCHPOINT

IF R DID NOT SAY 50 PERCENT CHANCE THAT WILL BE LIVING (P029 NOT 50), GO TO P107 BRANCHPOINT

P157

Do you think that it is about equally likely that you will die before

[85 (IF AGE IS LESS THAN 65)/
80 (IF AGE IS 65-69)/
85 (IF AGE IS 70-74)/
90 (IF AGE IS 75-79)/
95 (IF AGE IS 80-84)/
100 (IF AGE IS 85-89)]

as it is that you will live to

[85 (IF AGE IS LESS THAN 65)/
80 (IF AGE IS 65-69)/
85 (IF AGE IS 70-74)/
90 (IF AGE IS 75-79)/
95 (IF AGE IS 80-84)/
100 (IF AGE IS 85-89)]

or beyond, or are you just unsure about the chances?

1. EQUALLY LIKELY
2. UNSURE
DK
RF

P107 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

~~IF R IS YOUNGER THAN 65 (A019 < 65), GO TO P175 P032 BRANCHPOINT~~

IF THIS IS NOT A REINTERVIEW R (Z076 NOT 1), GO TO TO P032 BRANCHPOINT

IF R IS 65 OR OLDER (A019 >= 65), ASK P107

IF R IS YOUNGER THAN 65 (A019 < 65) AND THE ALTERNATE WAVE FLAG IS SET TO ASK QUESTIONS (P195_Altwave = 0), ASK P107

ELSE, GO TO TO P032 BRANCHPOINT

P107

Assuming that you are still living at

~~[85 (IF AGE IS LESS THAN 75)/~~
~~90 (IF AGE IS 75-79)/~~
~~95 (IF AGE IS 80-84)/~~
~~100 (IF AGE IS 85-89)],~~

[75 (IF AGE IS LESS THAN 65)
80 (IF AGE IS 65-69)
85 (IF AGE IS 70-74)
90 (IF AGE IS 75-79)
95 (IF AGE IS 80-84)
100 (IF AGE IS 85-89)]

what are the chances that you will be free of serious problems in thinking, reasoning or remembering things that would interfere with your ability to manage your own affairs?

    Absolutely
Absolutely
    No chance    0................................................................100    Certain


PERCENT_____
DK
RF

Assuming that you are still living at

[85 (IF AGE IS LESS THAN 75)/
90 (IF AGE IS 75-79)/
95 (IF AGE IS 80-84)/
100 (IF AGE IS 85-89)],

[75 (IF AGE IS LESS THAN 65)
80 (IF AGE IS 65-69)
85 (IF AGE IS 70-74)
90 (IF AGE IS 75-79)
95 (IF AGE IS 80-84)
100 (IF AGE IS 85-89)]

what are the chances that you will be free of serious problems in thinking, reasoning or remembering things that would interfere with your ability to manage your own affairs?

    Absolutely
Absolutely
    No chance    0.............................................................100    Certain
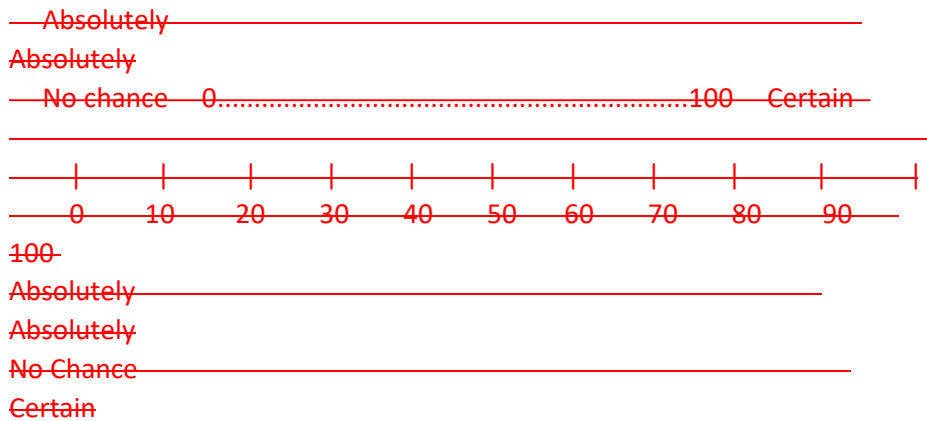
[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

    NUMBER   _____

P175 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

P175

Please think about what you might spend out-of-pocket for your own medical expenses over the next year, including expenses such as doctor and dentist expenses, hospitals, nursing homes, prescription drugs and any others.  Please include expenses that you would pay yourself (or a family member for you), but do not include what is covered by insurance.

On a scale from 0 to 100 (where 0 means absolutely no chance and 100 means absolutely certain), what are the chances that you will spend more than $1,500 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]


    Absolutely
Absolutely
    No chance     0.................................................................100     Certain


    |      |      |      |      |      |      |      |      |      |      |
    0     10     20     30     40     50     60     70     80     90
100
Absolutely
Absolutely
No Chance
Certain

where 0= ABSOLUTELY NO CHANCE and 100= ABSOLUTELY CERTAIN

Please think about what you might spend out-of-pocket for your own medical expenses over the next year, including expenses such as doctor and dentist expenses, hospitals, nursing homes, prescription drugs and any others.  Please include expenses that you would pay yourself (or a family member for you), but do not include what is covered by insurance.

On a scale from 0 to 100 (where 0 means absolutely no chance and 100 means absolutely certain), what are the chances that you will spend more than $1,500 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]

Absolutely
Absolutely
No chance     0.........................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P176 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R DID NOT GIVE CHANCES OF SPENDING 1,500, (P175={DK or RF}), GO TO P032 BRANCHPOINT

IF R SAID 0 PERCENT CHANCE OF SPENDING (P175 = 0), GO TO P176

OTHERWISE, GO TO P177

P176

On this same, 0 to 100 scale where 0 means absolutely no chance and 100 means absolutely certain, what are the chances that you will spend more than $500 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]

Absolutely

Absolutely

No chance   0...................................................100   Certain

PERCENT_____

DK

RF

On this same, 0 to 100 scale where 0 means absolutely no chance and 100 means absolutely certain, what are the chances that you will spend more than $500 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]

Absolutely

Absolutely

No chance   0...................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P177 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

OTHERWISE, GO TO P032 BRANCHPOINT

P177

(On this same, 0 to 100 scale where 0 means absolutely no chance and 100 means absolutely certain,) what are the chances that you will spend more than $3,000 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]

PERCENT_____

DK

RF

On this same, 0 to 100 scale where 0 means absolutely no chance and 100 means absolutely certain, what are the chances that you will spend more than $3,000 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]

Absolutely

Absolutely

No chance    0.................................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P178 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R SAID MORE THAN 0 PERCENT CHANCE OF SPENDING (P177 > 0), GO TO P178

OTHERWISE, GO TO P032 BRANCHPOINT

P178

(On this same, 0 to 100 scale where 0 means absolutely no chance and 100 means absolutely certain,) what are the chances that you will spend more than $8,000 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE .]

Absolutely                                                                    Absolutely
No chance    0...............................................................100    Certain

PERCENT_____
DK
RF

On this same, 0 to 100 scale where 0 means absolutely no chance and 100 means absolutely certain, what are the chances that you will spend more than $8,000 during the coming year?

[INSTR: PLEASE DO NOT INCLUDE PREMIUMS FOR HEALTH INSURANCE OR LONG-TERM CARE INSURANCE.]

Absolutely                                                                    Absolutely
No chance    0...............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P032 BRANCHPOINT: IF P009 = 0 GO TO P056_AssistP

IF R {IS LESS THAN 65 (A019 <65) and IS REINTERVIEW R (Z076=1)} or R IS CURRENTLY IN NURSING HOME or DID NOT ANSWER NURSING HOME QUESTION (A237=1, 2, 4, 7, 8, 9, 10, or DK, RF), GO TO P111 BRANCHPOINT

P032

IF R IS UNDER 65 YEARS OF AGE (A019 <65):
What is the percent chance that you will ever have to move to a nursing home?

OTHERWISE:
What is the percent chance that you will move to a nursing home in the next five years?

DEFINITION: By "nursing home" we mean a facility that provides all of the following services for its residents: 24-hour nursing assistance and supervision, dispensing of medication, personal assistance, and room & meals.

    Absolutely
Absolutely
    No chance    0..............................................................100   Certain


PERCENT_____
DK
RF

IF R IS UNDER 65 YEARS OF AGE (A019 <65):
What is the percent chance that you will ever have to move to a nursing home?

OTHERWISE:
What is the percent chance that you will move to a nursing home in the next five years?

By "nursing home" we mean a facility that provides all of the following services for its residents: 24-hour nursing assistance and supervision, dispensing of medication, personal assistance, and room & meals.

    Absolutely
Absolutely
    No chance    0..............................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

    NUMBER _____

P111 BRANCHPOINT: IF R DID NOT REPORT THAT CURRENTLY RECEIVES
SOCIAL SECURITY BENEFITS (J478 NOT 1), GO TO P112 BRANCHPOINT

P111

On a scale from 0 to 100, (where 0 means no chance and 100 means
absolutely certain,) what do you think is the percent chance that the benefits
you yourself are receiving from Social Security will be cut some time over
the next 10 years?

    Absolutely
Absolutely
   No chance   0..............................................................100   Certain

PERCENT_____
DK
RF

On a scale from 0 to 100, where 0 means no chance and 100 means
absolutely certain, what do you think is the percent chance that the benefits
you yourself are receiving from Social Security will be cut some time over
the next 10 years?

    Absolutely                        Absolutely
   No chance   0..............................................................100   Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

   NUMBER _____

P112 BRANCHPOINT: IF R DID NOT REPORT THAT EXPECTS TO RECEIVE
SOCIAL SECURITY BENEFITS IN THE FUTURE (J479 NOT 1), GO TO P183 P041
BRANCHPOINT

P112

On a scale from 0 to 100, what do you think is the percent chance that over the next 10 years there will be changes to Social Security that will reduce your future benefits compared to what you would get under the current system?

     Absolutely
Absolutely
     No chance    0...............................................................100    Certain

PERCENT_____
DK
RF

On a scale from 0 to 100, what do you think is the percent chance that over the next 10 years there will be changes to Social Security that will reduce your future benefits compared to what you would get under the current system?

     Absolutely
Absolutely
     No chance    0...............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

     NUMBER  _____

P183

What is the percent chance that Congress will change the Medicare program sometime in the next 10 years, so that it becomes less generous than now?

     Absolutely
Absolutely
     No chance    0...............................................................100    Certain

PERCENT_____
DK
RF

What is the percent chance that Congress will change the Medicare program sometime in the next 10 years, so that it becomes less generous than now?

Absolutely
Absolutely
No chance    0.............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P047

By next year at this time, what is the percent chance that mutual fund shares invested in blue chip stocks like those in the Dow Jones Industrial Average will be worth more than they are today?

Absolutely
Absolutely
No chance    0.............................................................100    Certain

PERCENT_____
DK
RF

By next year at this time, what is the percent chance that mutual fund shares invested in blue chip stocks like those in the Dow Jones Industrial Average will be worth more than they are today?

Absolutely                                                        Absolutely
No chance    0.............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

NUMBER _____

P113 BRANCHPOINT: IF R DID NOT ANSWER 50 PERCENT CHANCE THAT MUTUAL FUND WILL BE WORTH MORE (P047 NOT 50) GO TO P149 EPISTEMIC RESPONSE ASSIGNMENT

P113

Do you think that it is about equally likely that these mutual fund shares will increase in worth as it is that they will decrease in worth by this time next year, or are you just unsure about the chances?

1. EQUALLY LIKELY
2. UNSURE
DK
RF

P149 EPISTEMIC RESPONSE ASSIGNMENT: A RESPONDENT IS ASSIGNED AN EPISTEMIC RESPONSE CODE AT P149 BASED ON RESPONSES TO QUESTIONS P047, P113

1. EPISTEMIC RESPONSE
2. NON-EPISTEMIC RESPONSE

EPISTEMIC RESPONSE: IF R ANSWERED {DK or RF AT P047 (P047 ={DK or RF})} or ANSWERED {UNSURE or DK AT P113 (P113= {2 or DK})}, THEN CODE 1 EPISTEMIC RESPONSE IS ASSIGNED TO P149.

P150 BRANCHPOINT: IF R PROVIDED AN EPISTEMIC RESPONSE (P149 = 1), GO TO P097

IF R SAID 0 PERCENT CHANCE THAT MUTUAL FUND WILL BE WORTH MORE (P047 = 0), GO TO P180

P150

By next year at this time, what is the percent chance that mutual fund shares invested in blue-chip blue chip stocks like those in the Dow Jones Industrial Average will have gained in value by more than 20 percent compared to what they are worth today?

Absolutely
Absolutely
No chance   0..................................................................100   Certain

PERCENT_____
DK
RF

By next year at this time, what is the percent chance that mutual fund shares invested in blue-chip blue chip stocks like those in the Dow Jones Industrial Average will have gained in value by more than 20 percent compared to what they are worth today?

— Absolutely
Absolutely
— No chance    0...............................................................100    Certain

[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]

— NUMBER _____

P180 BRANCHPOINT:  IF R SAID 100 PERCENT CHANCE THAT MUTUAL FUND WILL BE WORTH MORE (P047 = 100 or P150 = 100), GO TO P097

IF R DID NOT GIVE CHANCES OF MUTUAL FUNDS GAINING (P150={DK or RF}), GO TO P097

P180

By next year at this time, what is the percent chance that mutual fund shares invested in blue-chip blue chip stocks like those in the Dow Jones Industrial Average will have fallen in value by more than 20 percent compared to what they are worth today?

— Absolutely
Absolutely
— No chance    0...............................................................100    Certain

PERCENT_____
DK
RF

~~By next year at this time, what is the percent chance that mutual fund shares invested in blue-chip blue chip stocks like those in the Dow Jones Industrial Average will have fallen in value by more than 20 percent compared to what they are worth today?~~

~~Absolutely~~
~~Absolutely~~
~~No chance    0..................................................................100    Certain~~

~~[INSTR: ENTER ANY NUMBER FROM 0 TO 100.]~~

~~NUMBER _____~~

~~P097~~

~~How closely do you follow the stock market: very closely, somewhat, or not at all?~~

~~1. VERY CLOSELY~~
~~2. SOMEWHAT CLOSELY~~
~~3. NOT AT ALL~~
~~DK~~
~~RF~~
~~How closely do you follow the stock market?~~

~~1. VERY CLOSELY~~
~~2. SOMEWHAT CLOSELY~~
~~3. NOT AT ALL~~
~~DK~~
~~RF~~

P041 BRANCHPOINT:  IF P009 = 0 GO TO P056_AssistP

IF THIS IS A REINTERVIEW R (Z076=1) AND THE ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (P195_Altwave NOT 0), GO TO ~~P185~~ P056 BRANCHPOINT

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*Note: Question P041 are always asked of new interview Rs. They are asked of core reinterview Rs only in alternate waves. They were last asked of core reinterview Rs in 2018 and will be asked again in 2022.  P041 became an alternate wave field in 2016 but before it was being commented and uncommented in/out each wave. P195_altwave uses the same logic as E165_altwave but it is opposite on/off. (when E165 is on P195 is off).*

P041

[INSTR: READ SLOWLY.]

In planning your (family's) saving and spending, which of the following time periods is <u>most important</u> to you [and your [husband/wife/partner]], the next few months, the next year, the next few years, the next 5-10 years, or longer than 10 years?

1. THE NEXT FEW MONTHS
2. THE NEXT YEAR
3. THE NEXT FEW YEARS
3. THE NEXT 5-10 YEARS
3. LONGER THAN 10 YEARS
DK
RF

In planning your (family's) saving and spending, which of the following time periods is <u>most important</u> to you [and your [husband/wife/partner]], the next few months, the next year, the next few years, the next 5-10 years, or longer than 10 years?

1. THE NEXT FEW MONTHS
2. THE NEXT YEAR
3. THE NEXT FEW YEARS
3. THE NEXT 5-10 YEARS
3. LONGER THAN 10 YEARS

P185

10 years from now, do you think your own standard of living will be higher, lower or the same as now?

1. HIGHER
2. LOWER
3. SAME
DK
RF

P056_AssistP Branchpoint:

Ask if this is an Iwer Adminstered Iw, Else go to next Section.

P056_
AssistP

P ASSIST
[INSTR: HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN
SECTION P -- EXPECTATIONS?]

1. NEVER
2. A FEW TIMES
3. MOST OR ALL OF THE TIME