Health and Retirement Study: 2003 Mail Survey



Conducted by:

The Survey Research Center The University of Michigan

Sponsored by:

The National Institute on Aging



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 does not ask any questions about such topics.

We have divided the questionnaire into three different topic sections. It is very important that the questions in Section A and C 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). For Section B, we suggest that the member(s) of the household most knowledgeable about the topics be involved in completing the questionnaire. At the end of each section, there is a place where you can tell us who actually answered the questions for that section.

Many questions can be answered by placing a check on the line in front of your response. Some questions may not apply to you, and you will be instructed to skip them. When this occurs, you will find an arrow (→) from your answer to the next appropriate question number. When no special instruction is given for your response choice, please continue with the next question.

If you have any questions about the questionnaire, please feel free to call us at **1-800-759-7947**.

THANK YOU!

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 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
A1. Watching programs or movies/videos on TV	hours last week	OR	□ 0 hours
A2. Reading newspapers or magazines	hours last week	OR	□ 0 hours
A3. Reading books	hours last week	OR	□ 0 hours
A4. Listening to music	hours last week	OR	□ 0 hours
A5. Sleeping and napping (including at night)	hours last week	OR	□ 0 hours

	Hours spent last week		No time spent last week
A6. Walking	hours last week	OR	□ 0 hours
A7. Participating in sports or other exercise activities	hours last week	OR	□ 0 hours
A8. Visiting in-person with friends, neighbors, or relatives	hours last week	OR	□ 0 hours
A9. Communicating by telephone, letters, or e-mail with friends, neighbors, or relatives	hours last week	OR	□ 0 hours
A10. Working for pay	hours last week	OR	□ 0 hours
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
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
A28. Attending concerts, movies, or lectures, or visiting museums	hours last month	OR	□ 0 hours
A29. Singing or playing a musical instrument	hours last month	OR	□ 0 hours
A30. Doing arts and crafts projects, including knitting, embroidery, or painting	hours last month	OR	□ 0 hours

	Hours spent last month		No time spent last month				
A31. Doing home improvements, including painting, redecorating, or making home repairs	hours last month	OR	□ 0 hours				
A32. Working on, maintaining, or cleaning your car(s) or vehicle(s)	hours last month	OR	□ 0 hours				
A33. Dining or eating outside the home (not related to business or work)	hours last month	OR	□ 0 hours				
A34. How many days in the last twelve months were you away from home on overnight trips or vacations? (Check one.) Zero → Go to Question A36 1-7 8-14 15-21 22 or more A35. What proportion of those days away from home were related to business or work? (Check one.)							
 None Less than half About half More than half All 							
Now think about everything you of A36. How often do you use your		eck o	ne.)				
RarelySometimesOftenAlmost all the timUncertain, can't sa							

A37. How often do you use your body in what you do? (Check one.)
Rarely
Sometimes
Often
Almost all the time
Uncertain, can't say
Still thinking about everything you do during waking hours:
A38. How often are your activities done with other people? (Check one.)
Rarely
Sometimes
Often
Almost all the time
Uncertain, can't say
A39. How often do your activities benefit other people? (Check one.)
Rarely
Sometimes
Often
Almost all the time
Uncertain, can't say
A40. 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:
A41 . Approximately, how long did it take you to complete Section A?
Minutes

End of Section A.

Section B:

We would like to know how families spend their income. Please indicate whether your household made any of these purchases in the past 12 months, and, 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.

truck? (If it was a leas	se, we are asking	about new	long-te	erm leases).	
	Yes No →	Go to Question	B2			
If so, w leased?	hat were the n	nake, model, yea	r and price	of the v	vehicle(s) yo	ou purchased or
(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?
B2 . In t	he past twelve	months, has you	ur househol	d purch	nased a refri	gerator?
	Yes →	About how mu	ch was the	purcha	se price? \$_	
B3 . In t dryer?	he past twelve	months, has you	ur househol	d purch	nased a was	hing machine and/or
	Yes -	About how mu	ch was the	purcha	se price? \$_	

B4 . In the past	twelve months, has your household purchased a dishwasher?
	Yes → About how much was the purchase price? \$No
B5. In the past	twelve months, has your household purchased a television?
	Yes → About how much was the purchase price? \$No
B6 . In the past	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 yearly." 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 yearly		No money spent on this in last 12 months
B7. Homeowner's or renter's insurance	\$	OR	□ \$0
B8. Property taxes	\$	OR	□ \$0
B9. 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

For the items on this page 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 spend on a yearly basis. 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 yearly		No money spent on this in last 12 months
B13. Mortgage	\$	OR	\$	OR	□ \$0
B14. Rent	\$	OR	\$	OR	□ \$0
B15. Electricity	\$	OR	\$	OR	□ \$0
B16. Water	\$	OR	\$	OR	□ \$0
B17. Heating fuel for the home	\$	OR	\$	OR	□ \$0
B18. Telephone, cable, internet	\$	OR	\$	OR	□ \$0
B19. Car payments: interest & principal	\$	OR	\$	OR	□ \$0

The next three pages have items that some people do not purchase on a regular basis, so please estimate what you actually spent. Please use the time period that is easiest for you to estimate your spending. For example, if it is easiest for you to think about what you spent on clothing last month then please report how much you spent last month. If it is easiest to estimate spending on clothing over the last 12 months, then please report that amount.

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.

B20. Housekeeping supplies: cleaning	Amount spent last month	OR	Amount spent in last 12 months	OR	No money spent on this in last 12 months
and laundry products	' 		· 		1 -
B21. Housekeeping, dry cleaning and laundry services: hiring costs for housekeeping or home cleaning, and amount spent at dry cleaners and laundries	\$	OR	\$	OR	□ \$0
B22. Gardening and yard supplies: yard, lawn and garden products	\$	OR	\$	OR	□ \$0
B23. Gardening and yard services: hiring costs including materials they provided	\$	OR	\$	OR	□ \$0

	Amount spent last month		Amount spent in last 12 months		No money spent on this in last 12 months
B24. Home repairs and maintenance: materials your household bought directly	\$	OR	\$	OR	□ \$0
B25. Home repairs and maintenance services: hiring costs including materials they provided	\$	OR	\$	OR	□ \$0
B26. Clothing and apparel: including footwear, outerwear, and products such as watches or jewelry	\$	OR	\$	OR	□ \$0
B27. Personal care products and services: including hair care, shaving and skin products, amount spent at hair dresser, manicure, etc.	\$	OR	\$	OR	□ \$0
B28. Prescription and nonprescription medications: out-of-pocket cost, not including what's covered by insurance	\$	OR	\$	OR	□ \$0

	Amount spent last month		Amount spent in last 12 months		No money spent on this in last 12 months
B29. Health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care	\$	OR	\$	OR	□ \$0
B30. Medical supplies: out-of-pocket cost, not including what's covered by insurance	\$	OR	\$	OR	□ \$0
B31. Tickets to movies, sporting events, and performing arts	\$	OR	\$	OR	□ \$0
B32. Sports: including gym, exercise equipment such as bicycles, skis, boats, etc.	\$	OR	\$	OR	□ \$0
B33. Hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc.	\$	OR	\$	OR	□ \$0
B34. Contributions to religious, educational, charitable, or political organizations	\$	OR	\$	OR	□ \$0

	Amount spent last month		Amount spent in last 12 months		No money spent on this in last 12 months
B35. Cash or gifts to family and friends outside your household: including alimony and child support payments	\$	OR	\$	OR	□ \$0

For the items on this page 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 you spent on food and beverages last week, 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 last week		Amount spent last month		Amount spent in last 12 months		No money spent on this in last 12 months
B36. Food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores	\$	OR	\$	OR	\$	OR	□ \$0
B37. Dining/drinking out: items in restaurants, cafes, and diners, including take-out food	\$	OR	\$	OR	\$	OR	□ \$0
B38. Gasoline	\$	OR	\$	OR	\$	OR	□ \$0

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 income. 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.

B39 . La	ast year, my household spent: (Check one.)
	More than its income → About how much more? \$ Less than its income → About how much less? \$ About the same as its income Uncertain, can't say
	appose next year you were to find your household with 20% more income than, what would you do with the extra income? (Check one.)
	Save or invest all of it → Go to Question B42 Spend or donate all of it Spend and save some. → I would spend% & save% of it Uncertain, can't say → Go to Question B42
	you chose to spend all or part of it, what would you spend the extra income on? all that apply.)
	 Trips, travel or vacations Clothing Eating out / food and beverages New home, home repairs or household items Entertainment, sports and hobbies Automobile expenses
	ow imagine that next year you were to find yourself with 20% less household. What would you do? (Check one.)
	 Not cut my spending at all → Go to Question B44 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 B44

B43 . If you chose to spend less, then on what that apply.)	at items	s would you s	pend less? (C	heck all	
Trips, travel or vacations Clothing Eating out / food and bevera New home, home repairs or least transports and ho Automobile expenses	househ	old items			
B44 . We would like to understand more abo		_	-	ı retired?	
	1	No → Comp l	ete BOX B		
BOX A – Retired:	BOX	B – Not Ret	ired:		
 a. How did your TOTAL spending change with retirement? Stayed the same → Go to c Increased Decreased b. By how much? % 	 d. How do you expect your TOTAL spending to change with retirement? Stay the same → Go to f Increase Decrease e. By how much?% 				
c . For the items below, check (✓) whether			low, check (✓)		
		expect spending to increase, decrease ay the same in retirement:			
sulf of the sum in remaining		<i>y</i> •••••			
B45.		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 items					
e. Entertainment, sports, and hobbies					
f. Automobile expenses				1	

	questions in Section B answered by the person to whom this 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 relative, a friend, a care provider, or what:
B47 . Approxim	nately, how long did it take you to complete Section B?
	Minutes

End of Section B.

Section C:

*	s in Section C answered by the person to whom this questionnaire someone else answer for that person? (Check one.)
question The que The que The que The que	e questions were answered by the person to whom the nnaire was addressed estions were answered by that person's spouse or partner estions were answered by that person's son or daughter estions were answered by someone else: Please say if you are a s, a friend, a care provider, or what:
C5. Approximately, ho	ow long did it take you to complete Section C?
Minutes	S
Thank yo	ou for your participation in this important survey!