

# Compact Codebook

## CogEcon 2017 Public (Version 2.0)

### Table of Contents

I. IDs and demographics (from CogUSA) .....	Variables 1-13
II. Sample and system variables .....	Variables 14-19
III. Constructed variables .....	Variables 20-26
IV. Cog Econ 2017 survey content .....	Variables 27-207

#### Key:

Variable = Name of variable in dataset

Obs = Number of non-missing observations

Min = Minimum value

Max = Maximum value

Label = Variable label

Var #	Variable	Obs	Unique	Mean	Min	Max	Label
1	sampid	449	449	.	.	.	Unique ID
2	chhid	449	353	.	.	.	cogusa household id variable (sampid)
3	cpn	449	2	.	.	.	cogusa person number id variable (sampid)
4	birthyr	449	38	1947.143	1924	1963	R YEAR BORN
5	gender	449	2	1.556793	1	2	gender
6	female	449	2	0.5567929	0	1	female
7	race	446	3	1.123318	1	3	race
8	hispanic	449	3	4.988864	1	8	R HISPANIC/LATINO
9	white	446	2	0.9237668	0	1	white/majority
10	black	446	2	0.029148	0	1	black
11	hs_deg	449	2	0.9888641	0	1	high school degree
12	coll_deg	449	2	0.6191537	0	1	college degree
13	educ	449	12	14.84633	1	17	education
14	c5_wrandom	449	2	1.476615	1	2	c5 wealth question order
15	c5_incentive_random	449	2	1.45657	1	2	c5 FeeX incentive randomization
16	c5_result	449	2	1.082405	1	2	c5 outcome
17	c5_compmo	449	3	10.79955	1	12	c5 month completed
18	c5_compyr	449	2	2017.033	2017	2018	c5 year completed
19	c5_lastQ	449	15	.	.	.	Last question presented to R
20	c5_age_m	449	243	842.2227	650	1126	Age (in months) at c5
21	c5_age_y	449	37	69.75278	54	93	Age (in years) at c5
22	c5_birth_flag	449	3	0.0066815	0	2	Birth day and/or month missing?
23	c5_relstat	448	4	2.082589	0	3	c5 relationship status
24	c5_relstat_chng	448	3	0.0758929	0	2	c5 rel stat changed
25	c5_finr	449	2	0.7906459	0	1	2017 FinR?
26	c5_finr_how	449	4	1.594655	1	5	how c5_finr coded
27	c5_A0	449	5	2.356347	1	5	A0: self-rated health condition?
28	c5_A1	449	2	0.9443207	0	1	A1: R uses email?
29	c5_A3	424	5	1.45283	1	5	A3: How often R checks email
30	c5_A4	449	6	1.616927	1	6	A4: How often R uses Internet other than email
31	c5_A4_A	445	61	.	.	.	A4_A: Electronic devices used last year
32	c5_A4_A_SMARTPHONE	449	2	0.7750557	0	1	A4_A: used smartphone last year
33	c5_A4_A_LAPTOP	449	2	0.6792873	0	1	A4_A: used laptop last year
34	c5_A4_A_TABLET	449	2	0.5122494	0	1	A4_A: used tablet last year
35	c5_A4_A_DESKTOP	449	2	0.6169265	0	1	A4_B: used desktop computer last year
36	c5_A4_A_EREADER	449	2	0.2271715	0	1	A4_A: use eReader last year

Var #	Variable	Obs	Unique	Mean	Min	Max	Label
37	c5_A4_A_GAMINGDEVICE	449	2	0.0378619	0	1	A4_A: used gaming device last year
38	c5_A4_A_TVVIDEO	449	2	0.3674833	0	1	A4_B: streamed Internet video
39	c5_A4_B	423	6	1.44208	1	7	A4_B: connection to Internet
40	c5_A4_C	422	24				A4_C: use Internet to access financial info?
41	c5_A4_C_BANK	423	2	0.7163121	0	1	A4_C: access bank account online
42	c5_A4_C_BROK_RET_MUT_ACCOUNT	423	2	0.4349882	0	1	A4_C: access brokerage/retirement/mutual fund account online
43	c5_A4_C_CRED_CARD_ACCOUNT	423	2	0.6122931	0	1	A4_C: access credit card account online
44	c5_A4_C_MORTGAGE	423	2	0.1678487	0	1	A4_C: access mortgage online
45	c5_A4_C_UTIL_OTHER_BILLS	423	2	0.498818	0	1	A4_C: access utility/other bills online
46	c5_A4_C_NONE	423	2	0.2104019	0	1	A4_C: access no finances online
47	c5_A4_E	422	58				A4_E: utilize online banking or bill paying?
48	c5_A4_E_VIEW_BANK	423	2	0.7352246	0	1	A4_E: view bank balance/transaction online
49	c5_A4_E_MAKE_BANK	423	2	0.6359338	0	1	A4_E: make bank payment online
50	c5_A4_E_VIEW_CRED_CARD	423	2	0.6548463	0	1	A4_E: view credit card balance/activities online
51	c5_A4_E_VIEW_BROK_RET_MUT	423	2	0.4231678	0	1	A4_E: view brokerage/retirement/mutual fund account online
52	c5_A4_E_MAKE_BROK_RET_MUT	423	2	0.1891253	0	1	A4_E: make brokerage/retirement/mutual fund accounts transactions on
53	c5_A4_E_FILE_TAX	423	2	0.3356974	0	1	A4_E: file tax return online
54	c5_A4_E_VIEW_UTIL_BILL	423	2	0.501182	0	1	A4_E: view utility bills online
55	c5_A4_E_NONE	423	2	0.177305	0	1	A4_E: no online banking or bill paying
56	c5_A4_F	423	130				A4_F: use Internet for purchases?
57	c5_A4_F_BUY_ITEM	423	2	0.8699764	0	1	A4_F: buy items online
58	c5_A4_F_PAY_BILLS	423	2	0.6666667	0	1	A4_F: pay bills online
59	c5_A4_F_BOOK_TRAVEL	423	2	0.5673759	0	1	A4_F: book travel online
60	c5_A4_F_SEND_RECEIVE_MONEY	423	2	0.250591	0	1	A4_F: send/receive money online
61	c5_A4_F_BUY_TICKETS	423	2	0.465721	0	1	A4_F: buy tickets online
62	c5_A4_F_MAKE_RESERVATION	423	2	0.2789598	0	1	A4_F: make reservations online
63	c5_A4_F_DISCOUNT_COUPON	423	2	0.4704492	0	1	A4_F: find discount coupons online
64	c5_A4_F_BUY_SELL_MARKET	423	2	0.3144208	0	1	A4_F: use online marketplace
65	c5_A4_F_BUY_SELL_CLASSIFIED	423	2	0.1725768	0	1	A4_F: use online classified sites
66	c5_A4_F_NONE	423	2	0.0591017	0	1	A4_F: do not use Internet for purchases
67	c5_A4_I	423	287				A4_I: other uses of Internet?
68	c5_A4_I_EMAIL	423	2	0.9881797	0	1	A4_I: send or read email
69	c5_A4_I_PHONE	423	2	0.4326241	0	1	A4_I: online phone call
70	c5_A4_I_RESTAURANT_RECS	423	2	0.498818	0	1	A4_I: look for restaurant recommendations
71	c5_A4_I_SERVICES_RECS	423	2	0.4184397	0	1	A4_I: look for service provider recommendations
72	c5_A4_I_NEWS	423	2	0.8085106	0	1	A4_I: read the news
73	c5_A4_I_FINANC_MKTS	423	2	0.3380615	0	1	A4_I: follow financial markets
74	c5_A4_I_HEALTH_INFO	423	2	0.6903073	0	1	A4_I: get health information
75	c5_A4_I_MOVIES_TV	423	2	0.3971631	0	1	A4_I: watch movies or TV shows

Var #	Variable	Obs	Unique	Mean	Min	Max	Label
76	c5_A4_I_RESEARCH	423	2	0.5650118		0	1 A4_I: research using online websites
77	c5_A4_I_HOBBIES_INTERESTS	423	2	0.6004728		0	1 A4_I: get info about hobbies or interests
78	c5_A4_I_DIRECTION	423	2	0.8865248		0	1 A4_I: find direction or maps
79	c5_A4_I_SURVEY	423	2	0.4893617		0	1 A4_I: take a survey
80	c5_A4_I_WORK	423	2	0.3167849		0	1 A4_I: use Internet for work
81	c5_A4_I_NONE	423	1		0	0	0 A4_I: none of these Internet uses
82	c5_A4_G	422	65				A4_G: use social networking to connect?
83	c5_A4_G_FB	423	2	0.7210402		0	1 A4_G: use Facebook
84	c5_A4_G_YOUTUBE	423	2	0.4704492		0	1 A4_G: use Twitter
85	c5_A4_G_TWITTER	423	2	0.0921986		0	1 A4_G: use MySpace
86	c5_A4_G_LINKEDIN	423	2	0.2364066		0	1 A4_G: use LinkedIn
87	c5_A4_G_PINTEREST	423	2	0.2434988		0	1 A4_G: use Pinterest
88	c5_A4_G_GOOGLEPLUS	423	2	0.0992908		0	1 A4_G: use Google Plus
89	c5_A4_G_TUMBLR	423	2	0.0165485		0	1 A4_G: use Tumblr
90	c5_A4_G_INSTAGRAM	423	2	0.1134752		0	1 A4_G: use Instagram
91	c5_A4_G_OTHER	423	2	0.0189125		0	1 A4_G: other social networking sites
92	c5_A4_G_NONE	423	2	0.179669		0	1 A4_G: do not use social networking
93	c5_A4_H	346	3	1.728324		1	3 A4_H: read content or also post and message with social networking?
94	c5_A4_D	446	25				A4_D: use software or online services for finance?
95	c5_A4_D_FINC_SOFTWARE	449	2	0.1224944		0	1 A4_D: use financial software
96	c5_A4_D_ONLINE_SERVICE_FINC	449	2	0.0378619		0	1 A4_D: use online financial services
97	c5_A4_D_TAX_SOFTWARE	449	2	0.2004454		0	1 A4_D: use tax software
98	c5_A4_D_ONLINE_SERVICE_TAX	449	2	0.2004454		0	1 A4_D: use online tax services
99	c5_A4_D_OTHER	449	2	0.1024499		0	1 A4_D: use other software/online services
100	c5_A4_D_NONE	449	2	0.623608		0	1 A4_D: use no software/online services for finance
101	c5_D2	449	4	1.826281		1	4 D2: most knowledge of asset/debt/retirement planning
102	c5_B6	449	7	4.077951		1	66 B6: who makes retirement/financial decisions
103	c5_D3	128	2	1.4375		1	2 D3: who provides most accurate info about your finance
104	c5_C1	445	6	1.941573		1	6 C1: # of people in household
105	c5_C29	443	22				C29: respondent's current employment situation
106	c5_C29_1	443	2	0.2167043		0	1 C29: respondent working full time (including self-employment)
107	c5_C29_2	443	2	0.1715576		0	1 C29: respondent working part time (including self-employment)
108	c5_C29_3	443	2	0.0158014		0	1 C29: respondent unemployed and looking for work
109	c5_C29_4	443	2	0.0022573		0	1 C29: respondent temporarily laid off
110	c5_C29_5	443	2	0.0090293		0	1 C29: respondent on sick leave/other leave
111	c5_C29_6	443	2	0.0361174		0	1 C29: respondent is disabled
112	c5_C29_7	443	2	0.0428894		0	1 C29: respondent is homemaker
113	c5_C29_8	443	2	0.6297968		0	1 C29: respondent is retired
114	c5_C29_9	443	1	0		0	0 C29: respondent in other employment situation

Var #	Variable	Obs	Unique	Mean	Min	Max	Label
115	c5_C30	276	36	62.52174		33	91 C30: respondent's retirement age
116	c5_C31	278	2	0.9100719		0	1 C31: respondent completely retired?
117	c5_C32	184	31	71.48913		0	120 C32: when does respondent plan to retire completely
118	c5_C32_1	6	2	1.666667		0	2 C32: respondent never plan to stop working?
119	c5_C37	314	17				C37: partner's employment situation
120	c5_C37_1	314	2	0.2452229		0	1 C37: partner working full time (including self-employment)
121	c5_C37_2	314	2	0.1242038		0	1 C37: partner working part time (including self-employment)
122	c5_C37_3	314	2	0.0063694		0	1 C37: partner unemployed and looking for work
123	c5_C37_4	314	1	0		0	0 C37: partner temporarily laid off
124	c5_C37_5	314	2	0.0063694		0	1 C37: partner on sick leave/other leave
125	c5_C37_6	314	2	0.0286624		0	1 C37: partner is disabled
126	c5_C37_7	314	2	0.0732484		0	1 C37: partner is homemaker
127	c5_C37_8	314	2	0.589172		0	1 C37: partner is retired
128	c5_C37_9	314	2	0.0031847		0	1 C37: partner is in other employment situation
129	c5_C38	182	30	61.88462		30	84 C38: partner's retirement age
130	c5_C39	185	2	0.9513514		0	1 C39: partner completely retired?
131	c5_C40	123	23	68.76423		59	100 C40: when does partner plan to retire completely
132	c5_C40_1	3	2	1.666667		1	2 C40: partner never plan to stop working?
133	c5_C2_val	430	188	107182.4		0	2000000 C2: household income in past 12 mo
134	c5_C29_9_recode	17	1	1		1	1 C29: Other employment recoded
135	c5_C37_9_recode	2	1	1		1	1 C37: Other employment recoded
136	c5_D15	419	2	0.725537		0	1 D15: R's family hold tax-adv ret accts?
137	c5_D15_val	280	184	483599.7		0	3000000 D15: total val of tax-adv ret accts
138	c5_D15a_val	119	65	73772.89		0	800000 D15_A: val of short-term assets in tax-adv ret accts
139	c5_D15b_val	164	92	236103		0	2000000 D15_B: val of mut funds w/ both stcks & bnds in tax-adv ret accts
140	c5_D15c_val	161	93	310071.6		0	2255000 D15_C: val of stock/stock mut funds in tax-adv ret accts
141	c5_D15d_val	113	74	167230.4		0	1999130 D15_D: val of bond/bond funds in tax-adv ret accts
142	c5_D15e_val	44	25	101918.7		0	1000000 D15_E: val of other assets in tax-adv ret accts
143	c5_D16_val	381	163	474617.3		0	3.00E+07 D16: total val of assets out of tax-adv ret accts
144	c5_D16a_val	242	122	88776.98		0	1400001 D16_A: val of short-term assets out of tax-adv ret accts
145	c5_D16b_val	91	51	738230.4		0	4.50E+07 D16_B: val of mut funds w/ both stcks & bnds out of tax-adv ret accts
146	c5_D16c_val	132	85	329588.2		0	1.00E+07 D16_C: val of stock/stock mut funds out of tax-adv ret accts
147	c5_D16d_val	66	43	165912.8		0	1000000 D16_D: val of bond/bond funds out of tax-adv ret accts
148	c5_D16e_val	78	45	580554		0	2.50E+07 D16_E: val of other assets out of tax-adv ret accts
149	c5_D17	409	3	1.794621		0	99 D17: R's family have at least \$5,000 in stocks/stock mut funds?
150	c5_D18	225	11	5.488889		0	10 D18: approx % of assets in stocks/stock mut funds?
151	c5_D15a_yn	293	3	2.1843		0	99 D15_A: hold short-term assets in tax-adv ret accts
152	c5_D15b_yn	296	3	1.675676		0	99 D15_B: hold mut funds w/ both stcks & bnds in tax-adv ret accts
153	c5_D15c_yn	296	3	1.996622		0	99 D15_C: hold stock/stock mut funds in tax-adv ret accts

Var #	Variable	Obs	Unique	Mean	Min	Max	Label
154	c5_D15d_yn	294	3	3.846939		0	99 D15_D: hold bond/bond funds in tax-adv ret accts
155	c5_D15e_yn	287	3	6.738676		0	99 D15_E: hold other assets in tax-adv ret accts
156	c5_D15sum_val	229	169	527523.4		0	3212000 D15: Sum of D15 individual assets
157	c5_D15diff_val	227	97	9534.306	-697500		1694310 D15: [D15 total] - [D15 individual]
158	c5_D16a_yn	401	3	1.401496		0	99 D16_A: hold short-term assets out of tax-adv ret accts
159	c5_D16b_yn	400	3	1.515		0	99 D16_B: hold mut funds w/ both stcks & bnds out of tax-adv ret accts
160	c5_D16c_yn	400	3	1.37		0	99 D16_C: hold stock/stock mut funds out of tax-adv ret accts
161	c5_D16d_yn	396	3	1.707071		0	99 D16_D: hold bond/bond funds out of tax-adv ret accts
162	c5_D16e_yn	398	3	2.454774		0	99 D16_E: hold other assets out of tax-adv ret accts
163	c5_D16sum_val	288	178	654174		0	4.51E+07 D16: Sum of D16 individual assets
164	c5_D16diff_val	279	111	-123555.2	-4.49E+07		1.09E+07 D16: [D16 total] - [D16 individual]
165	c5_VRI_others_rec	425	20	2.887059		0	27 VRI: # of non-retirement accts referred to records when input
166	c5_VRI_retire_rec	344	9	1.383721		0	10 VRI: # of retirement accts referred to records when input
167	c5_VRI_others_elec	425	20	3.068235		0	27 VRI: # of non-retirement accts managed electronically
168	c5_VRI_retire_elec	344	10	1.34593		0	9 VRI: # of retirement accts managed electronically
169	c5_VRI_joint_or_sep	307	3	1.563518		1	3 VRI: joint or sep finance?
170	c5_VRI_pct_stock_overall	76	21	48.75		0	100 VRI: overall stock percentage
171	c5_VRI_corr_loop	440	5	0.2909091		0	4 VRI: correction loop
172	c5_VRI_retire_num	329	10	2.957447		1	10 VRI: # of retirement accts
173	c5_VRI_others_num	411	26	6.562044		1	27 VRI: # of non-retirement accts
174	c5_VRI_retire_nonempty_num	329	10	2.082067		0	10 VRI: # of nonempty retirement accts
175	c5_VRI_others_nonempty_num	411	24	4.734793		0	27 VRI: # of nonempty non-retirement accts
176	c5_VRI_asset_retire_val	255	189	476737.3		500	3203000 VRI: total value of tax-adv ret accts (assume missing val zero)
177	c5_VRI_asset_others_val	338	218	544242.6		500	3.13E+07 VRI: total value of other assets (assume missing val zero)
178	c5_VRI_retire_stk_pct	255	115	0.4523176		0	1 VRI: % of retirement asset in stock
179	c5_VRI_others_stk_pct	338	149	0.1986499		0	1 VRI: % of non-retirement asset in stock
180	c5_H1	404	20				H1: sources of info consulted to answer survey
181	c5_H1_recode	5	1	1		1	1 H1: sources of info consulted to answer survey recoded
182	c5_H1_ACCT_STAT	412	2	0.4805825		0	1 H1: used account statements to answer survey
183	c5_H1_TAX_RET	412	2	0.1820388		0	1 H1: used tax returns to answer survey
184	c5_H1_PER_FIN_SFT	412	2	0.0582524		0	1 H1: used personal finance software to answer survey
185	c5_H1_ASK_SMN	412	2	0.1165049		0	1 H1: asked someone else to answer survey
186	c5_H1_OTHER	412	2	0.0995146		0	1 H1: used other sources to answer survey
187	c5_H1_NONE	412	2	0.3956311		0	1 H1: did not consult anything to answer survey
188	c5_H2	410	5	1.178049		0	4 H2: is respondent same as invitee?
189	c5_H5	408	43	33.73284		5	600 H5: time spent on survey
190	c5_H1_A	411	3	1.571776		0	7 H1_A: consider participating FeeX linkage?
191	c5_FEEXCONSENT	142	2	0.3380282		0	1 FEEXCONSENT: consent to FeeX linkage
192	c5_sys_version	449	2	2.494432		2	4 FeeX incentive reminder

Var #	Variable	Obs	Unique	Mean	Min	Max	Label
193	c5_C2_val_flag	412	3	1.092233	1	3	C2: ExtVal/Rng/Miss FLAG
194	c5_D16_val_flag	412	3	1.281553	1	3	D16: ExtVal/Rng/Miss FLAG
195	c5_D15_val_flag	412	5	2.468447	1	9	D15: ExtVal/Rng/Miss FLAG
196	c5_D15a_val_flag	412	6	3.992718	1	9	D15a: ExtVal/Rng/Miss FLAG
197	c5_D15b_val_flag	412	6	3.543689	1	9	D15b: ExtVal/Rng/Miss FLAG
198	c5_D15c_val_flag	412	6	3.609223	1	9	D15c: ExtVal/Rng/Miss FLAG
199	c5_D15d_val_flag	412	6	4.070388	1	9	D15d: ExtVal/Rng/Miss FLAG
200	c5_D15e_val_flag	412	6	4.854369	1	9	D15e: ExtVal/Rng/Miss FLAG
201	c5_D16a_val_flag	412	6	2.912621	1	9	D16a: ExtVal/Rng/Miss FLAG
202	c5_D16b_val_flag	412	6	4.32767	1	9	D16b: ExtVal/Rng/Miss FLAG
203	c5_D16c_val_flag	412	6	3.975728	1	9	D16c: ExtVal/Rng/Miss FLAG
204	c5_D16d_val_flag	412	6	4.631068	1	9	D16d: ExtVal/Rng/Miss FLAG
205	c5_D16e_val_flag	412	6	4.529126	1	9	D16e: ExtVal/Rng/Miss FLAG
206	c5_VRI_asset_others_val_flag	449	3	1.616927	1	3	VRI: flag for non-retirement asset value
207	c5_VRI_asset_retire_val_flag	449	3	1.91314	1	3	VRI: flag for retirement asset values