

Health and Retirement Study: 2005 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 this survey.

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 $\frac{3}{4}$ or $\frac{1}{2}$).

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 related to business or work?

_____ Days

A35. How many days in the last twelve months were you away from home on overnight trips or vacations not related to business or work?

_____ Days

Now think about everything you do during waking hours:

A36. How often do you use your mind in what you do? (**Check one.**)

- _____ Rarely
- _____ Sometimes
- _____ Often
- _____ Almost all the time
- _____ Uncertain, can't say

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. 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, 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.

B1. 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).

_____ Yes
_____ No → **Go to Question B2**

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?

B2. In the past twelve months, has your household purchased a refrigerator?

_____ Yes → About how much was the purchase price? \$ _____
_____ No

B3. In the past twelve months, has your household purchased a washing machine and/or dryer?

_____ Yes → About how much was the purchase price? \$ _____
_____ No

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 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
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

	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	☐ \$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
B28. Gardening and yard services: hiring costs including materials they provided	\$_____ 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
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
B33. Medical supplies: out-of- pocket cost, not including what's covered by insurance	\$_____ 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
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

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.

B40. Last 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

B41. Suppose next year you were to find your household with 20% more income than normal, what would you do with the extra income? (**Check one.**)

- ☐ Save or invest all of it → **Go to Question B43**
- ☐ Spend or donate all of it
- ☐ Spend and save some. → I would spend _____% & save _____% of it
- ☐ Uncertain, can't say → **Go to Question B43**

B42. If you chose to spend all or part of it, what would you spend the extra income on? (**Check 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

B43. Now imagine that next year you were to find yourself with 20% less household income. What would you do? (**Check one.**)

- ☐ Not cut my spending at all → **Go to Question B45**
- ☐ 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**

B44. If you chose to spend less, then on what items would you spend less? (**Check 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

B45. We would like to understand more about spending in retirement. Are you retired?

☐ Yes → **Complete BOX A** ☐ No → **Complete BOX B**

BOX A – Retired: a. How did your TOTAL spending change with retirement? ☐ Stayed the same → Go to c ☐ Increased ☐ Decreased b. By how much? % c. For the items below, check (✓) whether the spending increased, decreased or stayed the same in retirement:	BOX B – Not Retired: d. How do you expect your TOTAL spending to change with retirement? ☐ Stay the same → Go to f ☐ Increase ☐ Decrease e. By how much? % f. For the items below, check (✓) whether you expect spending to increase, decrease or stay the same in retirement:
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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 items			
e. Entertainment, sports, and hobbies			
f. Automobile expenses			

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.)**

- ☐ 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:_____

B48. Approximately, how long did it take you to complete Section B?

Minutes

End of Section B.

Section C:

C1. Are you currently married, living with a partner, separated, divorced, widowed, or have you never been married? (**Check one.**)

- ☐ Married
- ☐ Living with a partner
- ☐ Separated
- ☐ Divorced
- ☐ Widowed
- ☐ Never married
- ☐ Other, specify: _____

C2. Are you working now, temporarily laid off, unemployed and looking for work, disabled and unable to work, retired, a homemaker, or what? (**Check all that apply.**)

- ☐ Working now
- ☐ Temporarily laid off
- ☐ Unemployed and looking for work
- ☐ Disabled
- ☐ Retired
- ☐ Homemaker
- ☐ Other, specify _____
- ☐ Uncertain, can't say

C3. Please add any comments that you wish in the space below:

C4. Were the questions in Section C 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:_____

C5. Approximately, how long did it take you to complete Section C?

_____ Minutes

Thank you for your participation in this important survey!