

This PDF is a selection from a published volume from the National Bureau of Economic Research

Volume Title: Women Working Longer: Increased Employment at Older Ages

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Volume Publisher: University of Chicago Press

Volume ISBNs: 978-0-226-53250-9 (cloth); 978-0-226-53264-6 (e-ISBN)

Volume URL: <http://www.nber.org/books/gold-12>

Conference Date: May 21-22, 2016

Publication Date: April 2018

Chapter Title: Appendix: The Health and Retirement Study (HRS)

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Chapter URL: <http://www.nber.org/chapters/c13871>

Chapter pages in book: (p. 297 – 298)

Appendix: The Health and Retirement Study (HRS)

The Health and Retirement Study (known as the HRS and as the University of Michigan Health and Retirement Study) is a widely used data set. (More information can be found at <http://hrsonline.isr.umich.edu/>.) This brief appendix will discuss certain details of general importance to the chapters in the volume that use the HRS. These include the chapters by Goldin and Katz, Maestas, Lahey, Fahle and McGarry, Lusardi and Mitchell, and Fitzpatrick (listed in order of presentation in the volume).

The HRS has been supported by the National Institute on Aging and the Social Security Administration. The study was begun in 1992 with a random sample of households in which at least one member was born between 1931 and 1941 and thus between fifty-one and sixty-one years old.

The initial sample is known as the HRS cohort, and also as the “Intermezzo” cohort. In households containing a married or partnered couple, the “spouse” and “respondent” categories were randomly assigned. Spouses were not given positive sample weights until 1998, if born from 1931 to 1941. If they were born from 1942 to 1947, they are not given positive sample weights until the “War Baby” (WB) cohort was added. The War Baby (WB) cohort was born 1942 to 1947. The “Early Baby Boomer” (EBB) cohort, born 1948 to 1953, was added in 2004. The Mid-Boomer (MBB) cohort, 1954 to 1959, was added in 2010. The WB, EBB, and MBB cohorts were between fifty-one and fifty-six years old. Figure VA.1 provides a concise visual summary of the various HRS cohorts and waves.

The cohorts mentioned have all been surveyed every two years. Additional cohorts born before 1931 are also part of the HRS, but the HRS, WB, and EBB are the primary cohorts used by the authors in this volume. At the time of this writing, the HRS data are available to 2012.

Some of the authors in this volume have also used the restricted-access

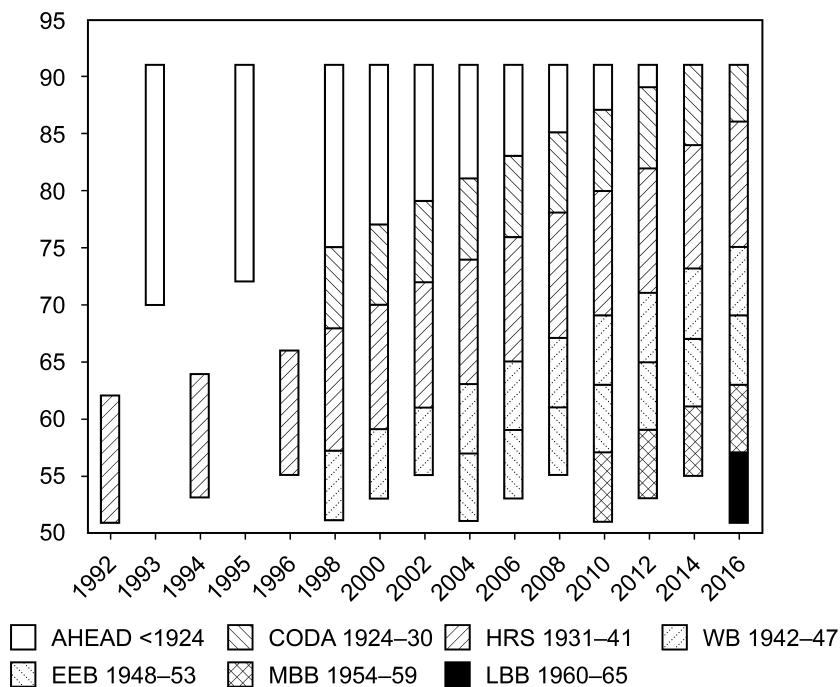


Fig. VA.1 Health and Retirement Study (HRS) sample design

Source: http://hrsonline.isr.umich.edu/index.php?p=sdesign&_ga=1.72094355.1277731491.1414899467. Note: The years 2014 and 2016 were not available at the time of writing.

versions of the HRS. These restricted-access versions contain additional information, such as annual income from Social Security Administration records and W-2 forms. Some authors have also used versions that have detailed information on occupation and industry.

Most authors have used the RAND HRS Data Files, which are a harmonized compilation of much, but not all, of the HRS data. The RAND version allows the use of the (public access) HRS files without having to access the separate waves for each of the various cohorts. Many of the authors have also used the RAND HRS Family Data Files, which do the same for information on family members of HRS respondents.