National Institute on Aging:

Health and Retirement Study (HRS)

The Health and Retirement Study (HRS) surveys more than 22,000 Americans over the age of 50 every two years. Survey results and analyses paint an emerging portrait of an aging America's physical and mental health, insurance coverage, financial status, family support systems, labor market status, and retirement planning. The data contain unique and innovative features and are designed for cross-national comparisons with international counterparts that allow analysts to consider important research questions relating to aging societies.

Lead Agency:

National Institute on Aging (NIA)/National Institutes of Health (NIH)

Agency Mission:

Support and conduct genetic, biological, clinical, behavioral, social, and economic research related to the aging process, diseases and conditions associated with aging, and other special problems and needs of older Americans.

Foster the development of research and clinician scientists in aging.

Communicate information about aging and advances in research on aging to the scientific community, health care providers, and the public.

Principal Investigator:

David Weir, PhD
Institute for Social Research
University of Michigan
426 Thompson Street
Ann Arbor, Michigan 48106-1248

Partner Agency:
Social Security Administration

General Description:

Health and Retirement Study (HRS)
Since 1992, the NIH-supported Health and Retirement Study (HRS) has painted a detailed portrait of America's older adults, helping us learn about this growing population's physical and mental health, insurance coverage, financial situations, family support systems, work status, and retirement planning. Through its unique and in-depth interviews with a nationally representative sample of adults over the age of 50, the HRS provides an invaluable, growing body of multidisciplinary data to help address the challenges and opportunities of aging. During each 2-year cycle of interviews, the HRS

team surveys more than 20,000 people who represent the Nation's diversity of economic conditions, racial and ethnic backgrounds, health, marital histories and family compositions, occupations and employment histories, living arrangements, and other aspects of life. Since the inception of the HRS, more than 27,000 people have given 200,000 hours of interviews. The design and content of the HRS provides opportunities to analyze individual aging and population trends and subgroup differences, develop and test causal models, and simulate policy. The data have proven to be a valuable scientific and policy resource to both academic and federal researchers – there are over 7,000 registered users of the data and nearly 1,000 researchers have employed the data to publish more than 1,300 reports, including more than 600 peer-reviewed journal articles and book chapters, and 70 doctoral dissertations. The HRS is managed jointly through a cooperative agreement between the National Institute on Aging (NIA) and the Institute for Social Research (ISR) at the University of Michigan. The study is designed, administered, and conducted by the ISR, and decisions about the study content are made by the investigators. The principal investigators at the University of Michigan are joined by a cadre of co-investigators and working group members who are leading academic researchers from across the United States in a variety of disciplines, including economics, medicine, demography, psychology, public health, and survey methodology. In addition, a Data Monitoring Committee is charged with maintaining HRS quality, keeping the survey relevant and attuned to the technical needs of researchers who use the data and ensuring that it addresses the information needs of policymakers and the public. The development of international longitudinal aging studies using the HRS as a model is leading to the production of a network of cross-nationally comparable data sources to conduct timely research on population aging.

Excellence: What makes this project exceptional?

The Health and Retirement Study (HRS) has provided an invaluable, long-term look at the complex interplay of health, work, and economic status of Americans age 51 and older. Over the years, the study has been recognized for its high level of innovation and unique approaches within the social science research arena and has become the premier source of retirement data. The data is widely used by both academic and federal researchers. In terms of budget, sample size, number of interview hours, and number of researchers involved, the HRS ranks among the largest and most ambitious social and behavioral studies ever undertaken. Rather than being a narrowly controlled investigation of the hypotheses of a small group of scientists, it provides a laboratory for many researchers to explore their theories. The HRS has served as a model for other countries to develop harmonized cross-nationally comparable surveys.

Significance: How is this research relevant to older persons, populations and/or an aging society?

The HRS is widely recognized as the leading data source for research on the health and retirement behavior of older populations. The data are being used by federal and academic researchers to address critical questions facing aging populations. Broad national representation in the study allows it to look at the older population in general as well as the great diversity and variability of aging. The structure of the data allows researchers to investigate both current issues and changes over time. The HRS tracks the

health of respondents over time allowing researchers to probe the impacts of unexpected health events on other aspects of individuals' lives. The HRS, along with harmonized international companion studies, allows for comparisons of trends in aging and retirement worldwide.

Effectiveness: What is the impact and/or application of this research to older persons?

The HRS has enabled a significant amount of research supported by the federal government and private institutions of aging. Data and analyses from HRS have been used to publish more than 1,300 reports, including more than 600 peer-reviewed journal articles and book chapters and 70 doctoral dissertations on health and retirement.

Innovativeness: Why is this research exciting or newsworthy?

The HRS contains many survey innovations, including:

- Providing improved measurement of key concepts like assets using random entry bracketing, which reduces the number of non-responses by eliciting ranges of values from respondents who would otherwise give no information at all.

- Innovative concepts like participants' future expectations such as how long people expect to work in the future, their estimates of how long they will live, the likelihood of giving major financial assistance to family members in the future, whether or not they expect to leave a bequest and the amount of that bequest, and whether they think they will enter a nursing home or move to a new home or other living arrangement in the future.

- Short experimental modules administered to randomly selected subgroups of participants to test new concepts and explore narrowly focused topics such as physiological capacity, early childhood experiences, personality, quality of life, and employment opportunities.

- The largest national study of the prevalence of dementia in the United States using in-home assessments (the Aging, Demographics, and Memory Study - ADAMS).

- Collection of biomarker data including grip strength, lung capacity, walking ability, blood pressure, blood spot samples to assay for some common disease markers and salivary DNA samples.

- Consumption and time-use data.

- Linkages to administrative records on benefits and earnings from federal programs like Social Security and Medicare as well as employers to better understand pension plans.

- International data collections modeled after the HRS provide opportunities for comparable data for cross-national analyses.