Aging in Three Countries: A New Data Resource for Comparative Retirement Research

Presentation for:
IASSIST 2007
Montréal, Quebec
Acknowledgements

Funding for this pilot project comes from the Michigan Center for Demography of Aging at the University of Michigan which is funded by the National Institute on Aging

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Matthew Richardson
Mary Vardigan
Overarching Goal

To demonstrate the feasibility of creating a comparative, harmonized database for aging research

- Harmonize content and documentation from three studies
- Use existing technologies/processes at ICPSR to build a tool to search the harmonized documentation
Studies Included

• Health and Retirement Study (HRS)
• English Longitudinal Study and Ageing (ELSA)
• Mexican Health and Aging Survey (MHAS)
Statement of the Problem

- The data and documentation come from three disparate web sites.
- Question wording can vary slightly from study to study.
- Much of the HRS survey content appears in all three studies, but not all.
- Each of the three studies is complex (longitudinal and involving thousands of questions)
The Health and Retirement Study
A Longitudinal Study of Health, Retirement, and Aging
Sponsored by the National Institute on Aging

Product Release Announcements
- 2003 Consumption and Activities Mail Survey (CAMS) Final Version 1.0 (02/21/2007)
- HRS Wave 7 data (Early, Version 1.0) (02/21/2007)
- HRS Cross-Wave Master ID File (Final, Version 1.0) (02/28/2007)
- HRS Respondent Pension Data Tracker Files (Final, Version 1.0) (03/31/2007)
- HRS Tracton 2004 (Final, Version 2.0) (03/31/2007)
- 2004 Consumption and Activities Mail Survey (CAMS) (Final, Version 1.0) (03/31/2007)
- HRS 2005 Prescription Drug Study (Early, Version 1.0) (01/10/2007)
- 2003 Internet Survey Final Version 1.0 (01/09/2007)
- 2003 Consumption and Activities Mail Survey (CAMS) Version 1.0 (1/2/08)
- Implications for Pension Wealth (K-9) (01/31/2007)

About the Health and Retirement Study
The University of Michigan Health and Retirement Study (HRS) surveys more than 22,000 Americans over the age of 50 every two years. Supported by the National Institute on Aging (NIA, U01 AG009740), the study provides 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 full scope of the study is described in this graphical overview of the data collection process. HRS data products are available without cost to researchers and analysts. User Registration is required in order to download files.

News Items
- New Experimental Modules for HRS 2006 Invited
- NIH reviews funding for Health and Retirement Study
- Cross-National Aging Study Data Products Now Available
- More News and Events...

Data Alerts
- 2004 HRS Core (Final Release, Version 1.0) Some values in Section O changed for these respondents (03/21/2007)
- 2004 HRS Core (Final Release, Version 1.0) HSUEBH Changed for Five Respondents. (10/7/2006)
- RAND HRS Data: RAND HRS data files and codebook have been updated; new versions available through the HRS data download site. (10/15/2006)
- 2000 HRS Core (Final Release, Version 1.0) Correction to two cases in the 2000 HRS Core Final Release Data (11/28/2005)
- More Data Alerts...
Major Data Categories

Demographic Background - Demographics, including Birth Place/Date, Education, Marital History, Military History, Race, Religion.
Health Status - Health Status, including ADL/IADLs; common health conditions; assessment of vision and hearing; pain; smoking; alcohol.
Housing - Type of dwelling unit; value; ownership status; rental information; information on secondary residences and vacation homes; other housing costs.
Family Structure and Transfers - Child and sibling demographics; information of children and grandchildren; transfer information.
Employment - Work status, main job description; pension and retirement plans; description of other work.
Last Job - Work status, description of last job; pension and retirement plans; job-seeking activities.
Job History - Description of previous jobs; pension and retirement plans; Early Retirement Window; Exposure to Hazards.
Disability - Source of benefits; information on employment prior to disability; information on impairment(s) current and past.
Retirement Plans - Current status, future plans.
Cognition - Self-cognition; risk-taking; savings behavior; feelings about the future.
Net Worth - Current assets; expenses; income; net worth; wills; financial assistance.
Income - Household income components; assets; health and life insurance; lump-sum
Health and Life Insurance - Health insurance for respondent and spouse; Medicare/Medicaid status; life insurance; beneficiary information.
Widowhood - Death, earnings/work change; health insurance change; hours worked; life insurance; pension; Social Security; SSI; Veteran’s Benefits.
The Mexican Health and Aging Study (MHAS) is a prospective panel study of health and aging in Mexico. MHAS is supported by a grant from the National Institutes of Health/National Institute on Aging (AG 18016, B.J. Soldo, P.I.). The study is a collaborative effort among researchers from the Universities of Pennsylvania, Maryland, and Wisconsin in the U.S., and the Instituto Nacional de Estadística, Geografía e Informática (INEGI) in Mexico.

"MHAS-2001 respondent completing the cognition exercise while the interviewer keeps track of the time with the chronometer."
ICPSR solution...

- Harmonize the content – the question wording underlying the variables
  - Exact versus near matches of content
- Develop a technology for searching and displaying the harmonized content
  - Based on XML marked up documentation
Exact variable matches

Hehelf (ELSA)
Would you say your health is 1 excellent, 2 very good, 3 good, 4 fair, 5 or, poor?

C001 Q1226 (HRS)
Would you say your health is 1 excellent, 2 very good, 3 good, 4 fair, 5 or, poor, 8. DK, 9. RF?

C.1 (MHAS)
Would you say your health is 1 excellent, 2 very good, 3 good, 4 fair, 5 or, poor, 8 RF, 9 DK
Near variable matches

Heopt* (ELSA)
Has a doctor or optician ever told you that you have (or have had) ... Glaucoma or suspected glaucoma?

C101 Q1367 (mhas)
Has a doctor ever treated you for glaucoma?
Key ICPSR Decisions

• We captured both exact and near matches, but we differentiate these for the user.

• We also grouped the health variables into major variable groupings so that a user can see quickly if there is content in a major substantive area across the three studies.
Part of the ICPSR Solution:

ICPSR Social Science Variables Database (SSVD)

The SSVD is a project to demonstrate the effectiveness of searching across studies at the variable level utilizing the Data Documentation Initiative (DDI) as a codebook markup standard. Codebooks which are marked up according to the DDI standard can be easily imported into the SSVD to be searched without additional processing.
Social Science Variables Database

Search Variables

The Social Science Variables Database (SSVD) was created with funding from the National Science Foundation as part of ICPSR's infrastructure in the Social Sciences award (SES-9977284). The SSVD is a project to demonstrate the effectiveness of searching across studies at the variable level utilizing the Data Documentation Initiative (DDI) as a codebook markup standard. Codebooks which are marked up according to the DDI standard can be easily imported into the SSVD to be searched without additional processing.

See which codebooks can be searched

Please note that search results involving the following studies are inaccurate:

- T377
- 6597
- 3199
- 3764
- 2267
- 7128
- 3191
- 3499

ICPSR is investigating this problem and plans to have a new version of the SSVD available in 2007.
Search Details: basicSrch

Disclaimer: The variable frequencies below are unweighted and are provided for data exploration purposes only.

Q27A
NATIONAL SURVEY OF ADOLESCENTS IN THE UNITED STATES, 1995.
Q: Have you ever tried cigarette smoking, even one or two puffs?

<table>
<thead>
<tr>
<th>freq</th>
<th>value</th>
<th>label</th>
</tr>
</thead>
<tbody>
<tr>
<td>1796</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>2250</td>
<td>2</td>
<td>No</td>
</tr>
<tr>
<td>2</td>
<td>3</td>
<td>Not sure</td>
</tr>
<tr>
<td>1</td>
<td>4</td>
<td>Refused</td>
</tr>
<tr>
<td>1</td>
<td>9</td>
<td>Unknown</td>
</tr>
</tbody>
</table>

New Search
Progress to Date

- Generated XML markup of the health and demographic sections of HRS, ELSA, and MHAS codebooks
- Harmonized, down to the variable-level, HRS (2002) and ELSA (2002) and MHAS (2001) – health section
- Created (and matched) variable groups
- Strict versus loose matches
- Functionality (built from SSVD): -browse & search at the variable and variable group-level
- Test site: http://staging.icpsr.umich.edu/harm/
HRS/ELSA/MHAS Data Exploration Tool

Project Overview

Metadata from the Health and Retirement Study (HRS), the English Longitudinal Study of Ageing (ELSA), and the Mexican Health and Aging Study (MHAS) are combined in this interactive tool that can be used to explore common survey content across the three studies. The tool currently includes information from the health section of the three surveys.

Project Background

The Health and Retirement Study is an ongoing longitudinal study that began in 1992 and documents the changing social, economic, health and psychological experiences of men and women age 50+. Since 1992, there have been "inter" survey data collection efforts in other countries undertaken so that the data might be compared with the United States and with each other. ICPSR has undertaken this pilot project to demonstrate the feasibility of organizing, harmonizing, and presenting these data in a way that facilitates research and demonstrates the extent to which the data are comparable.

Browse Variable Groups

- Variable Groups by Topic
  - Variable Groups by Match
    - Short
    - Loose

Browse Codebooks

- ELSA
- HRS
- MHAS

Search Variables

Search

Acknowledgements

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Utilities (for site owner)
<table>
<thead>
<tr>
<th>Variable Group</th>
<th>ELSA</th>
<th>HRS</th>
<th>MHAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity-limiting Illness</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Activity-Limiting Pain</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Blood Test for Cholesterol</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Body-Weight</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Cataract Surgery</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Chest Pain/Anemia</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Current Drinking</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Currently Smoke</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Diabetes Under Control</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Diet for Diabetes</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Difficulty Speaking or Swallowing</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Difficulty Thinking</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Difficulty walking 1/4 mile</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Difficulty with Vision</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Distance Vision - Self-assessed</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Drink Per Day</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Ever Smoked</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Falls in Last Two Years</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Feet/Ankle Swelling</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Frequency of Drinking</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Frequency of Heavy Drinking</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Frequency of Mild Physical Activity</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Frequency of Moderate Physical Activity</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>General Health - Self-assessed</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>General Health - Self-assessed</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
# Current Drinking

**ELSA**

### HRS

**HC12A: EVER DRINK ALCOHOL**

**Question:** Do you ever drink any alcoholic beverages such as beer, wine, or liquor?

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
<td>8104</td>
</tr>
<tr>
<td>3</td>
<td>NEVER HAVE USED ALCOHOL</td>
<td>140</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
<td>9319</td>
</tr>
<tr>
<td>9</td>
<td>DK (Don't Know)</td>
<td>1</td>
</tr>
<tr>
<td>9</td>
<td>RF (Refused)</td>
<td>3</td>
</tr>
</tbody>
</table>

Summary Statistics: Valid 18187

### MHAS

**c80: Drink now**

**Question:** Do you ever drink any alcoholic beverages such as beer, wine, liquor, or pulque (alcohol made from fermented cactus sap)?

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>4734</td>
</tr>
<tr>
<td>2</td>
<td>No</td>
<td>9956</td>
</tr>
<tr>
<td>3</td>
<td>Never has used alcohol</td>
<td>1495</td>
</tr>
<tr>
<td>8</td>
<td>RF</td>
<td>4</td>
</tr>
<tr>
<td>9</td>
<td>DK</td>
<td>3</td>
</tr>
</tbody>
</table>

Range of Valid Data Values: 1-9
Total Responses: Summation of listed categories: 15162
Summary Statistics: Valid 15182
### General Health - Self-assessed

**ELSA**

**HEHELP: Would you say your health is ... ?**

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>-2</td>
<td>Refusal</td>
<td>3</td>
</tr>
<tr>
<td>-1</td>
<td>Don’t know</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Not applicable</td>
<td>6193</td>
</tr>
<tr>
<td>1</td>
<td>very good</td>
<td>1599</td>
</tr>
<tr>
<td>2</td>
<td>good</td>
<td>1721</td>
</tr>
<tr>
<td>3</td>
<td>fair</td>
<td>1171</td>
</tr>
<tr>
<td>4</td>
<td>or, poor?</td>
<td>541</td>
</tr>
</tbody>
</table>

Range of Valid Data Values: -9.5

Summary Statistics: Valid 12100

**HRS**

**HC001: RATE HEALTH**

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EXCELLENT</td>
<td>2050</td>
</tr>
<tr>
<td>2</td>
<td>VERY GOOD</td>
<td>5082</td>
</tr>
<tr>
<td>3</td>
<td>GOOD</td>
<td>5723</td>
</tr>
<tr>
<td>4</td>
<td>FAIR</td>
<td>3516</td>
</tr>
<tr>
<td>5</td>
<td>POOR</td>
<td>1669</td>
</tr>
<tr>
<td>6</td>
<td>DK [Don’t Know]</td>
<td>8</td>
</tr>
<tr>
<td>7</td>
<td>RF (Refused)</td>
<td>3</td>
</tr>
</tbody>
</table>

Summary Statistics: Valid 18167

**MHAS**

**c1: Quality of health**

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Excellent</td>
<td>371</td>
</tr>
<tr>
<td>2</td>
<td>Very Good</td>
<td>627</td>
</tr>
<tr>
<td>3</td>
<td>Good</td>
<td>4495</td>
</tr>
<tr>
<td>4</td>
<td>Fair</td>
<td>5595</td>
</tr>
<tr>
<td>5</td>
<td>Poor</td>
<td>2169</td>
</tr>
<tr>
<td>8</td>
<td>RF</td>
<td>2</td>
</tr>
<tr>
<td>9</td>
<td>DK</td>
<td>1</td>
</tr>
</tbody>
</table>

Summary Statistics: Valid 14150

Range of Valid Data Values: 1-9

Universe: Skip if proxy
Total Responses: Summation of listed categories: 15182
Summary Statistics: Valid 14150
HRS/ELSA/MHAS Data Exploration Tool

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Browse Variable Groups

- Variable Groups by Topic
- Variable Groups by Match
  - Short
  - Loose

Browse Codebooks

- ELSA
- HRS
- MHAS

Search Variables

[Search]

Acknowledgements

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Utilities (for site owner)
### Search Results

3 results found, sorted by relevance

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>H395</td>
<td>from: Health and Retirement Study - 2002 Core, Section B: Demographics (Respondent), Section C: ...</td>
</tr>
<tr>
<td>H3695</td>
<td>from: Health and Retirement Study - 2002 Core, Section B: Demographics (Respondent), Section C: ...</td>
</tr>
<tr>
<td>H3965</td>
<td>from: Health and Retirement Study - 2002 Core, Section B: Demographics (Respondent), Section C: ...</td>
</tr>
</tbody>
</table>

Please note that our search engine retrieves a maximum of 500 search results. Results past 500 will not be viewable.
Future Plans

• Include SHARE documentation
  ▪ The survey group at University of Michigan will test displaying harmonized output from the BLAISE survey instrument

• Apply for NIH funding to harmonize the full set