



Social Security Omni Survey: Annotated Questionnaire

October 2022

Sample size: Current and Future Social Security retirement beneficiaries ages 50 and older (Total: n=926, Current: n=469, Future: n=457)

Fielding dates: August 18–23, 2022

Sample source: Foresight 50+ Omnibus (Conducted by NORC at the University of Chicago for AARP)

Main Questions

1. In the last three years, how often, if at all, have you done the following activities? (If the frequency in which you have done the activity varies, please select the most-frequent span of time in which you have done the activity in the past three years.)

- a. See your doctor for a wellness check/physical

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	3%	1%	4%
Less than once a year	9%	3%	15%
Once per year	50%	49%	52%
2 - 3 times a year	24%	29%	19%
4 or more times a year	12%	16%	8%
Not Applicable	0%	0%	1%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	1%	2%



b. Evaluate your financial goals

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	11%	10%	13%
Less than once a year	10%	7%	13%
Once per year	17%	17%	17%
2 - 3 times a year	24%	25%	22%
4 or more times a year	26%	24%	28%
Not Applicable	9%	12%	5%
SKIPPED ON WEB/DON'T KNOW/REFUSED	3%	4%	2%

c. Check the balances on your loans (e.g., mortgage, car, etc.)

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	9%	11%	7%
Less than once a year	6%	3%	9%
Once per year	6%	6%	6%
2 - 3 times a year	13%	10%	17%
4 or more times a year	39%	33%	45%
Not Applicable	26%	36%	16%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	1%	1%

d. Evaluate your amount of debt compared to your income

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	12%	13%	12%
Less than once a year	12%	9%	15%
Once per year	13%	15%	11%
2 - 3 times a year	16%	16%	16%
4 or more times a year	32%	30%	34%
Not Applicable	13%	16%	10%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	1%	2%



e. Contribute to a rainy-day savings fund

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	19%	19%	18%
Less than once a year	12%	11%	14%
Once per year	8%	7%	8%
2 - 3 times a year	13%	14%	12%
4 or more times a year	31%	26%	37%
Not Applicable	15%	21%	9%
SKIPPED ON WEB/DON'T KNOW/REFUSED	2%	1%	2%

f. Check the balances on your savings accounts

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	4%	2%	6%
Less than once a year	3%	2%	4%
Once per year	3%	3%	3%
2 - 3 times a year	9%	7%	10%
4 or more times a year	70%	74%	67%
Not Applicable	10%	12%	8%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	1%	2%

g. Check the balances in your 401k, IRA, or other retirement investment accounts

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	12%	11%	12%
Less than once a year	5%	2%	9%
Once per year	6%	5%	7%
2 - 3 times a year	15%	12%	18%
4 or more times a year	40%	42%	38%
Not Applicable	21%	27%	15%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	1%	2%



h. Review your insurance coverage (e.g., home, car, life, etc.)

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	8%	5%	11%
Less than once a year	21%	17%	25%
Once per year	46%	51%	42%
2 - 3 times a year	15%	16%	15%
4 or more times a year	5%	5%	5%
Not Applicable	3%	3%	3%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	2%	0%

i. Review your earnings history at the Social Security Administration's website (SSA.gov)

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	30%	36%	24%
Less than once a year	22%	19%	25%
Once per year	27%	23%	31%
2 - 3 times a year	9%	8%	9%
4 or more times a year	4%	3%	5%
Not Applicable	7%	9%	5%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	2%	0%

j. Review your credit report

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	16%	19%	14%
Less than once a year	19%	16%	22%
Once per year	17%	18%	16%
2 - 3 times a year	19%	21%	18%
4 or more times a year	24%	22%	26%
Not Applicable	3%	3%	3%
SKIPPED ON WEB/DON'T KNOW/REFUSED	2%	2%	1%



k. Get an oil change for your automobile

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	3%	1%	5%
Less than once a year	4%	5%	4%
Once per year	20%	25%	14%
2 - 3 times a year	51%	47%	55%
4 or more times a year	16%	15%	18%
Not Applicable	5%	5%	5%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	2%	0%

l. Review or update your will

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	37%	30%	44%
Less than once a year	31%	34%	29%
Once per year	11%	13%	9%
2 - 3 times a year	1%	1%	2%
4 or more times a year	0%	0%	1%
Not Applicable	16%	18%	14%
SKIPPED ON WEB/DON'T KNOW/REFUSED	2%	3%	1%

m. Estimate your future Social Security benefits

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Never	27%	29%	24%
Less than once a year	19%	14%	24%
Once per year	28%	24%	32%
2 - 3 times a year	9%	8%	10%
4 or more times a year	5%	5%	4%
Not Applicable	11%	18%	4%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	2%	0%



2. When it comes to planning for your life in retirement, which of the following statements best characterizes you?

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
I've completed my planning	54%	69%	39%
I want to plan, but I don't know where to begin	4%	2%	7%
I want to plan but I'm overwhelmed by information	4%	3%	5%
I want to plan but never seem to get around to it	7%	4%	11%
I know I should plan, but it is depressing to think about	6%	2%	10%
I know I should plan, but it is stressful to think about	7%	2%	11%
Other (please specify)	13%	15%	10%
Not applicable: I plan to never retire	5%	2%	7%
SKIPPED ON WEB/DON'T KNOW/REFUSED	1%	1%	0%

3. Which of the following best describes you?

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Currently receiving Social Security retirement benefits	56%	100%	11%
Not currently receiving Social Security retirement benefits but I am eligible to receive them in the future	43%	0%	87%
Not currently receiving Social Security retirement benefits and I am not currently eligible to receive them in the future	1%	0%	1%
SKIPPED ON WEB/DON'T KNOW/REFUSED	0%	0%	1%

[IF "Not currently receiving Social Security retirement benefits but eligible to receive them in the future"]

4. At what age do you expect to start claiming Social Security retirement benefits?

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
55-61	-	-	1%
62-64	-	-	18%
65-67	-	-	49%
68-69	-	-	5%
70+	-	-	26%



5. Do you currently receive Social Security Disability Insurance (SSDI) benefits?

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Yes	13%	5%	20%
No	85%	93%	77%
SKIPPED ON WEB/DON'T KNOW/REFUSED	2%	1%	3%

6. How much, if at all, do you worry that Social Security benefits may not keep up with inflation?

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Not at all	10%	10%	11%
A little	23%	29%	17%
Somewhat	29%	27%	32%
A lot	37%	34%	40%
SKIPPED ON WEB/DON'T KNOW/REFUSED	0%	1%	0%

SURV_MODE. Survey interview mode

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Phone interview	5%	9%	1%
Web Interview	95%	91%	99%

SURV_LANG. Survey Interview Language

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
English	99%	100%	97%
Spanish	1%	0%	3%

DEVICE. Device

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Desktop	48%	57%	39%
Phone interview (not online)	5%	9%	1%
Smartphone	46%	32%	59%
Tablet	1%	2%	0%



GENDER. Gender

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Male	48%	43%	53%
Female	52%	57%	47%
Unknown	0%	0%	0%

AGE2. Age – 2 categories

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
50-64	48%	7%	91%
65+	52%	93%	9%

RACETHNICITY. Combined Race/Ethnicity

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
White, non-Hispanic	70%	74%	65%
Black, non-Hispanic	11%	11%	11%
Other, non-Hispanic	1%	1%	0%
Hispanic	12%	8%	16%
2+, non-Hispanic	2%	2%	1%
Asian, non-Hispanic	5%	4%	6%

EDUC5. 5-Level Education (highest degree received)

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Less than HS	8%	7%	10%
HS graduate or equivalent	31%	37%	24%
Vocational/tech school/some college/ associates	25%	22%	29%
Bachelor's degree	19%	17%	21%
Post grad study/professional degree	16%	17%	16%



MARITAL. Marital Status

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Married	58%	55%	62%
Widowed	7%	10%	4%
Divorced	18%	19%	16%
Separated	7%	9%	5%
Never married	10%	7%	13%

EMPLOY. Current Employment Status

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Working - as a paid employee	35%	11%	60%
Working - self-employed	6%	6%	7%
Not working - on temporary layoff from a job	1%	2%	1%
Not working - looking for work	2%	1%	4%
Not working - retired	42%	71%	11%
Not working - disabled	10%	8%	13%
Not working - other	3%	2%	4%

INCOME. Household income

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Less than \$30,000	22%	24%	21%
\$30,000 to under \$60,000	27%	31%	22%
\$60,000 to under \$100,000	23%	24%	23%
\$100,000 or more	27%	21%	34%

REGION4. Region – 4 level

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Northeast	18%	18%	18%
Midwest	21%	20%	23%
South	38%	37%	39%
West	23%	25%	20%



METRO. Metropolitan Area Flag

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Non-Metro Area	18%	18%	17%
Metro Area	82%	82%	83%

INTERNET. Household internet access

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Non-internet household	11%	12%	10%
Internet Household	89%	88%	90%

PHONESERVICE. Telephone service for the household

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Landline telephone only	5%	9%	1%
Have a landline, but mostly use cellphone	19%	24%	14%
Have cellphone, but mostly use landline	17%	20%	14%
Cellphone only	58%	46%	71%
No telephone service	0%	0%	0%

HOUSING. Home ownership

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
Owned or being bought by you or someone in your household	76%	81%	70%
Rented for cash	22%	16%	28%
Occupied without payment of cash rent	3%	3%	2%

HOME_TYPE. Type of building of panelists' residence

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
A one-family house detached from any other house	73%	76%	71%
A one-family house attached to one or more houses	6%	5%	7%
A building with 2 or more apartments	16%	16%	17%
A mobile home or trailer	4%	3%	4%
Boat, RV, van, etc.	0%	0%	1%



HHSIZE. Household size (including children)

	Total (%)	Current (%)	Future (%)
<i>Unweighted n</i>	926	469	457
1	22%	25%	18%
2	46%	57%	34%
3	15%	9%	21%
4	8%	3%	13%
5	6%	3%	10%
6+	4%	4%	4%