



# Fast Facts and Figures about Social Security

Staff of the Office of Research and Statistics (ORS) respond to more than 100 calls per month for data about Old-Age, Survivors, and Disability Insurance (OASDI) program beneficiaries and Supplemental Security Income (SSI) program recipients. The calls come from Social Security staff—both from headquarters and the field—as well as from State agencies, congressional staff, and private organizations.

The data in this compilation are designed to answer the most frequently asked questions, not only about OASDI beneficiaries and SSI recipients, but also about the Medicare, Medicaid, and the AFDC programs.

Most of the data are from the **Annual Statistical Supplement** to the **Social Security Bulletin**, which contains more than 200 detailed statistical tables. Other data are from **Monthly Benefit Statistics** and other ORS publications. Finally, some data have not been previously published; where a source is not identified, the data are from ORS. Reprints of this feature will be available shortly.

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# General Information, 1987

## OASDI tax rate:

|                                   | Total OASDI | HI    |
|-----------------------------------|-------------|-------|
| Employee and employer, each . . . | 7.15%       | 5.70% |
| Self-employed* . . . . .          | 14.30       | 11.40 |
|                                   | 2.90        |       |

\*In 1986-89, the law provides the self-employed with a credit against their tax liability equal to 2.0 percent of self-employment income.

## Maximum earnings subject to Social Security taxes:

\$43,800

## Taxes payable:

|   |            |
|---|------------|
| Average earner . . . . .                | \$1,296.72 |
| Maximum earner . . . . .                | 3,131.70   |
| Self-employed maximum earner* . . . . . | 5,387.40   |

\*Effective amount after tax credit.

## Quarter of coverage:

\$460 in earnings equals one quarter of coverage

## Retirement earnings test:

|                        |                                 |
|------------------------|---------------------------------|
| Age 64-69 . . . . .    | \$8,160 annually, \$680 monthly |
| Under age 65 . . . . . | 6,000 annually, 500 monthly     |

## SSI payment standard:

|                  |
|------------------|
| \$340 individual |
| \$510 couple     |

## Substantial gainful activity:

Earnings of \$300 per month

## Benefit formula bend points (for workers who attain age 62, become disabled, or die in 1987):

|  |
|--|
| Primary insurance amount equals              |
| 90% of the first \$310 of AIME, plus         |
| 32% of AIME over \$310 through \$1,866, plus |
| 15% of AIME over \$1,866                     |

## Maximum family benefit:

|  |
|--|
| 150% of the first \$396 of PIA, plus       |
| 272% of PIA over \$396 through \$571, plus |
| 134% of PIA over \$571 through \$745, plus |
| 175% of PIA over \$745                     |

## Average earnings level:

|                        |          |
|------------------------|----------|
| 1985 . . . . .         | \$16,823 |
| 1986 . . . . .         | 17,418   |
| 1987 (est.)* . . . . . | 18,136   |

\*1987 OASDI Trustees Report, alternative II-B assumptions.

## Full-time Federal minimum wage level:

|                |         |
|----------------|---------|
| 1986 . . . . . | \$6,968 |
|----------------|---------|

## Poverty thresholds:

|   | 1984<br>(actual) | 1985<br>(actual) | 1986<br>(preliminary) |
|---|------------------|------------------|-----------------------|
| Aged individual . . .                     | \$4,979          | \$5,156          | \$5,270               |
| Couple, aged head<br>of household . . . . | 6,282            | 6,503            | 6,640                 |
| Family of four . . . .                    | 10,609           | 10,989           | 11,230                |

## Trust fund operations (amounts in billions):

| Calendar year  | Income  | Outgo   | Fund at<br>end of year |
|----------------|---------|---------|------------------------|
| 1986 (actual): |         |         |                        |
| OASI . . . . . | \$197.4 | \$181.0 | \$39.1                 |
| DI . . . . .   | 19.4    | 20.5    | 7.8                    |
| HI . . . . .   | 59.3    | 50.4    | 40.0                   |
| SMI . . . . .  | 24.7    | 27.3    | 8.3                    |
| 1987 (est.):*  |         |         |                        |
| OASI . . . . . | 209.6   | 188.5   | 60.1                   |
| DI . . . . .   | 20.3    | 21.1    | 6.9                    |
| HI . . . . .   | 63.3    | 49.1    | 54.1                   |
| SMI . . . . .  | 28.5    | 31.7    | 5.1                    |

\*1987 Trustees Reports, alternative II-B assumptions.

## OASDI administrative costs as a percent of contributions, fiscal year 1987:

1.2%

## Medicare:

|  | 1986  | 1987  |
|--|-------|-------|
| Part A deductible . . . . .                        | \$492 | \$520 |
| Part A coinsurance<br>(61st to 90th day) . . . . . | 123   | 130   |
| Part B annual deductible . . . . .                 | 75    | 75    |
| Part B monthly premium . . . . .                   | 15.50 | 17.90 |

## OASDI and SSI claims filed in fiscal year 1986:

|                |             |
|----------------|-------------|
| OASI . . . . . | 3.3 million |
| DI . . . . .   | 1.2 million |
| SSI . . . . .  | 1.5 million |

## Social Security numbers:

|   |             |
|---|-------------|
| Cards in active use<br>(children, workers, and beneficiaries) . . . . . | 205 million |
| Cards issued since 1936 . . . . .                                       | 306 million |
| Cards issued in fiscal year 1986 . . . . .                              | 5.6 million |

## OASDI benefit payments as a percent of gross national product:

| Fiscal year           | Total | OASDI | HI   |
|-----------------------|-------|-------|------|
| 1985 . . . . .        | 5.89  | 4.67  | 1.21 |
| 1986 (est.) . . . . . | 5.84  | 4.68  | 1.16 |



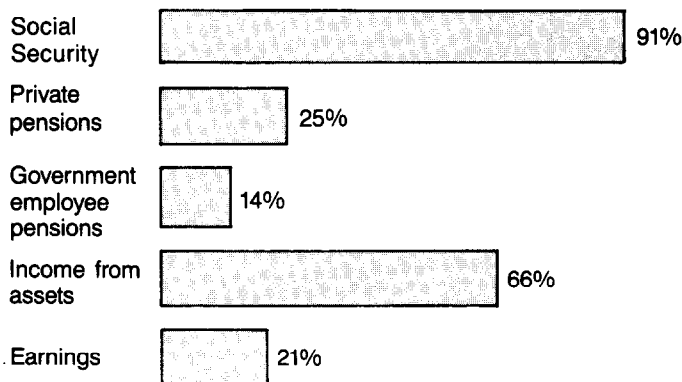
## Income of the Aged Population

### Receipt of Income by the Aged, 1962 and 1985

A smaller proportion of couples and nonmarried persons aged 65 or older received earnings in 1985 than in 1962. Social Security benefits, which were the most common source of income in 1962, became almost universal by 1985, with 91 percent of the elderly receiving them. The proportion of aged units with asset income, the next most common source, grew from one-half to two-thirds. In 1962, private pensions and government pensions were each received by less than 10 percent of the aged. By 1985, receipt rates for these sources had nearly tripled.

| Income source                     | 1962 | 1985 |
|-----------------------------------|------|------|
| Social Security benefits.....     | 69%  | 91%  |
| Private pensions.....             | 9    | 25   |
| Government employee pensions..... | 5    | 14   |
| Assets.....                       | 54   | 66   |
| Earnings.....                     | 36   | 21   |

### Percent of aged receiving income from various sources, 1985

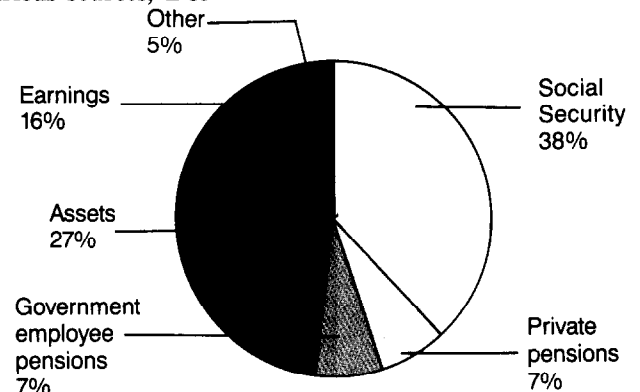


### Shares of Aggregate Income of the Aged, 1962 and 1985

In 1962, Social Security, other pensions, and income from assets and earnings comprised only 84 percent of the total income for the aged, compared with 95 percent in 1985. Although they accounted for only a small proportion of total income in 1985, private pensions more than doubled their share in the period. The share from assets increased by three-fourths and from Social Security by almost one-fourth. The share from government pensions changed little and the share from earnings was less than three-fifths as great in 1985 as it was in 1962.

| Income source                     | 1962 | 1985 |
|-----------------------------------|------|------|
| Social Security benefits.....     | 31%  | 38%  |
| Private pensions.....             | 3    | 7    |
| Government employee pensions..... | 6    | 7    |
| Assets.....                       | 16   | 27   |
| Earnings.....                     | 28   | 16   |
| Other.....                        | 16   | 5    |

### Percent of aggregate income of the aged from various sources, 1985



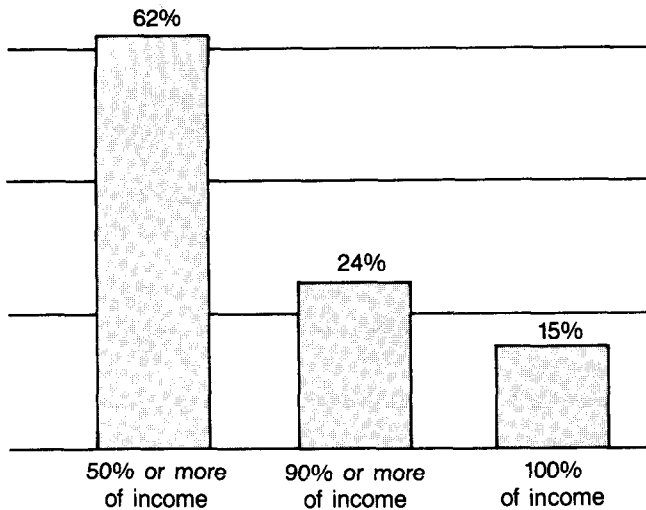
# OASDI Program

## Reliance on Social Security Benefits, 1985

The Social Security program pays benefits to more than 90 percent of those aged 65 or older. It is the major source of income (providing at least 50 percent of total income) for 62 percent of the beneficiary units, contributes almost all of the income (90 or percent more) for 24 percent, and is the only income for 15 percent.

| Proportion of income from Social Security benefits | Percent |
|--|---------|
| 50 percent or more.....                            | 62      |
| 90 percent or more.....                            | 24      |
| 100 percent.....                                   | 15      |

**Percent of beneficiary units with Social Security benefits as a major source of income, 1985**



## Workers and Insured Status

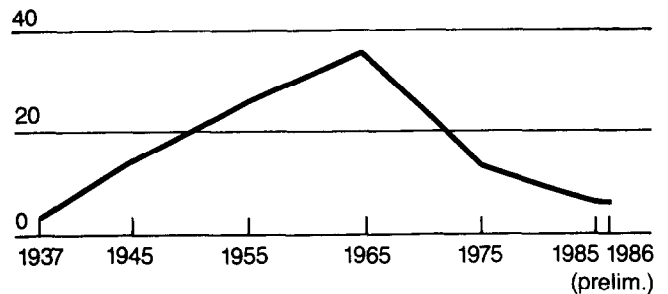
**Workers with taxable earnings, 1937-86.** In 1986, 124 million workers had earnings in employment covered by the Social Security program. Of those workers, 6 percent had earnings that equaled or exceeded the maximum amount subject to Social Security taxes, compared with 3 percent when the program began and a peak of 36 percent in 1965. About 91 percent of the earnings of workers in covered employment was taxable in 1986, about the same as in 1937.

[Numbers in millions]

| Year               | Total number | Percent with maximum earnings | Percent of covered earnings taxable |
|--------------------|--------------|-------------------------------|-------------------------------------|
| 1937.....          | 32.9         | 3                             | 92                                  |
| 1945.....          | 46.4         | 14                            | 88                                  |
| 1955.....          | 65.2         | 26                            | 80                                  |
| 1965.....          | 80.7         | 36                            | 71                                  |
| 1975.....          | 100.2        | 15                            | 84                                  |
| 1985 (preliminary) | 121.8        | 6                             | 90                                  |
| 1986 (preliminary) | 124.2        | 6                             | 91                                  |

Source: *Annual Statistical Supplement, 1986*, table 21, and Office of Research and Statistics, Social Security Administration.

**Percent of covered workers with maximum earnings**



**Insured workers, 1986.** Of the 176.0 million persons in the Social Security area population aged 20 or older in 1986, 57 percent were permanently insured for retirement benefits. That is, they had enough covered work experience to qualify for retired-worker benefits at retirement age. In all, 86 percent were fully insured—meaning they had at least one quarter of coverage for each year elapsed after 1950 (or age 21, if later) and before 1986 or the year in which they attained age 62 or became disabled. Some 63 percent were insured in the event of disability—that is, they were fully insured and had at least 20 quarters of coverage during the last 40 quarters.\*

\*The disability insured-status requirements are somewhat different for persons younger than age 32.

|  |       |
|--|-------|
| Total population aged 20 or older (in millions).....               | 176.0 |
| Percent fully insured for retirement and/or survivor benefits..... | 86    |
| Percent insured for disabled-worker benefits.....                  | 63    |
| Percent permanently insured.....                                   | 57    |

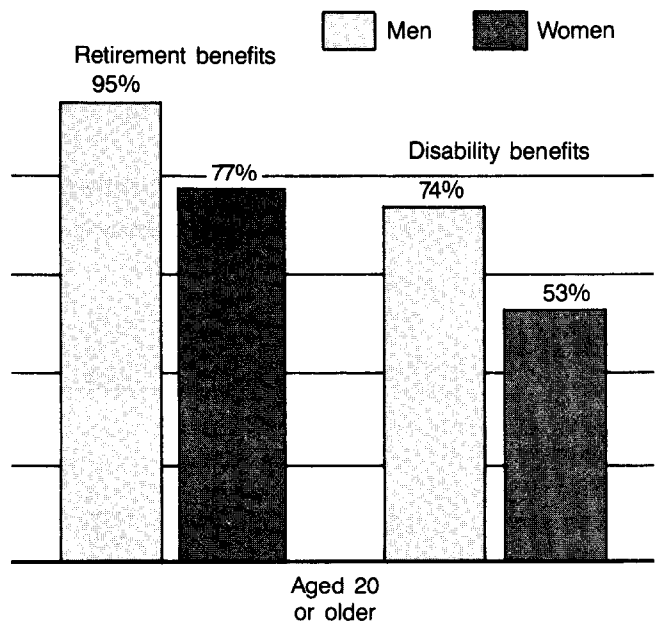
Source: **Annual Statistical Supplement, 1986**, table 32, and Office of the Actuary, Social Security Administration.

**Insured status by sex, 1986.** Men are more likely to be insured for Old-Age and Disability Insurance benefits than are women. Among men aged 20 or older in 1986, 95 percent were fully insured, compared with 77 percent of women. Some 74 percent of the men and 53 percent of the women met the insured-status requirements for Disability Insurance benefits.

| Insured status   | Men  | Women |
|--|------|-------|
| Population aged 20 or older (in millions).....         | 85.1 | 91.0  |
| Percent insured for retirement insurance benefits..... | 95   | 77    |
| Percent insured for disability insurance benefits..... | 74   | 53    |

Source: **Annual Statistical Supplement, 1986**, table 32, and Office of the Actuary, Social Security Administration.

**Percent insured for benefits, by sex**



## Benefit Awards

**Benefits awarded, 1986.** Benefits were awarded to almost 4 million persons in 1986. Almost half (45 percent) were retired workers and 11 percent were disabled workers. The remaining 44 percent were survivors of workers and auxiliaries—that is, spouses and children of retired or disabled workers who receive benefits based on the worker's earnings record.

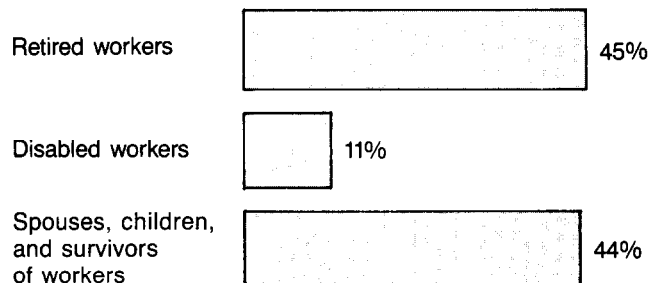
| Beneficiary                           | [Numbers in thousands] |               |
|---------------------------------------|------------------------|---------------|
|                                       | Total number           | Total percent |
| New awards.....                       | 3,853                  | 100           |
| Retired workers and auxiliaries.      | 2,215                  | 57            |
| Workers .....                         | 1,734                  | 45            |
| Spouses and children.....             | 481                    | 12            |
| Disabled workers and auxiliaries..... | 757                    | 20            |
| Workers .....                         | 417                    | 11            |
| Spouses and children.....             | 341                    | 9             |
| Survivors of deceased workers..       | 881                    | 23            |
| Special age-72 beneficiaries....      | *                      | **            |

\* Less than 500 persons who are now nearing age 90.

\*\* Less than 0.5 percent.

Source: **Monthly Benefit Statistics**, Calendar Year 1986, table 1.

### Percent of benefits awarded



**Benefits awarded to workers, 1960-86.** The 1.7 million awards to new retired-worker beneficiaries in 1986 represented a continuation of the general trend toward an increase in these awards that has prevailed since the program began. The 417,000 new disabled-worker awards were the largest number during the 1980's but far fewer than the peak in the mid-1970's.

| Year      | [Numbers in thousands] |                  |
|-----------|------------------------|------------------|
|           | Retired workers        | Disabled workers |
| 1960..... | 982                    | 208              |
| 1965..... | 1,183                  | 253              |
| 1970..... | 1,338                  | 350              |
| 1975..... | 1,506                  | 592              |
| 1980..... | 1,613                  | 397              |
| 1985..... | 1,690                  | 377              |
| 1986..... | 1,734                  | 417              |

Source: **Annual Statistical Supplement, 1986**, table 36, and **Monthly Benefit Statistics**, Calendar Year 1986, table 1.

### New awards

#### Retired workers

1960 982,000

1986 1,734,000

#### Disabled workers

1960 208,000

1986 417,000

## Benefits in Current-Payment Status

**Hypothetical benefit amounts, 1987.** A covered worker who had always earned the Federal minimum wage and who claimed benefits at age 62 in January 1987 would have received a monthly benefit of \$333. One who had always had earnings at or above the maximum amount subject to Social Security taxes and who claimed benefits at age 65 would have received \$789.

| Wage status   | Claimed benefits in January 1987 at— |        |
|---|--------------------------------------|--------|
|   | Age 62                               | Age 65 |
| Worker who had always earned the —                        |                                      |        |
| Federal minimum wage . . .                                | \$333                                | \$391  |
| Amount equal to average wages in covered employment . . . | 502                                  | 593    |
| Maximum subject to Social Security taxes . . .            | 662                                  | 789    |

Source: Office of the Actuary, Social Security Administration.

### Average amount of newly awarded benefits, 1986.

In 1986, the average monthly benefit amount for a person newly awarded benefits as a retired worker was \$459, compared with \$478 for a newly entitled disabled worker. The amount was \$450 for nondisabled widows and widowers. Children of retired and disabled workers received substantially lower benefits than did children of deceased workers.

| Beneficiary                              | Average monthly benefit amount |
|--|--------------------------------|
| <b>Retired workers and auxiliaries:</b>  |                                |
| Workers . . . . .                        | \$459                          |
| Spouses . . . . .                        | 226                            |
| Children . . . . .                       | 206                            |
| <b>Disabled workers and auxiliaries:</b> |                                |
| Workers . . . . .                        | 478                            |
| Spouses . . . . .                        | 127                            |
| Children . . . . .                       | 131                            |
| Widows and widowers (nondisabled) . . .  | 450                            |
| Disabled widows and widowers . . . . .   | 319                            |
| Widowed mothers and fathers . . . . .    | 324                            |
| Surviving children . . . . .             | 330                            |

Source: *Monthly Benefit Statistics*, Calendar Year 1986, table 1.

### Persons receiving monthly benefits, December 1986.

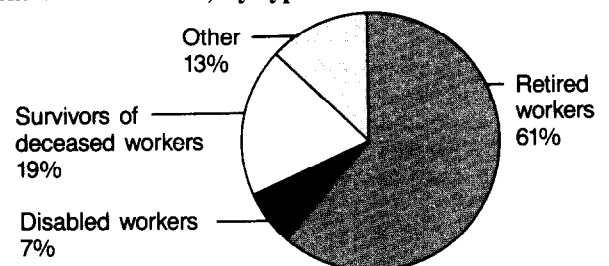
Almost 38 million persons were receiving monthly Social Security benefits in December 1986. Of these, the majority (61 percent) were retired workers and 7 percent were disabled workers. Some 32 percent were spouses or children of retired, disabled, or deceased workers.

| Beneficiary   | [Numbers in thousands] |               |
|---|------------------------|---------------|
|   | Total number           | Total percent |
| Total with benefits in current-payment status . . . | 37,708                 | 100           |
| Retired workers and auxiliaries                     | 26,525                 | 70            |
| Workers . . . . .                                   | 22,987                 | 61            |
| Spouses and children . . . . .                      | 3,538                  | 9             |
| Disabled workers and auxiliaries . . . . .          | 3,993                  | 11            |
| Workers . . . . .                                   | 2,727                  | 7             |
| Spouses and children . . . . .                      | 1,266                  | 3             |
| Survivors of deceased workers . . . . .             | 7,165                  | 19            |
| Special age-72 beneficiaries . . . . .              | 25                     | *             |

\* Less than 0.5 percent.

Source: *Monthly Benefit Statistics*, No. 12, February 1987, table 1.

### Percent of beneficiaries, by type



**Average benefit amounts for persons receiving benefits, December 1986.** At the end of 1986, the average monthly benefit amount was \$488 for both retired-worker beneficiaries and disabled-worker beneficiaries. Among survivor beneficiaries, nondisabled widows and widowers received an average payment of \$444 monthly.

| Beneficiary                            | Average monthly benefit amount |
|--|--------------------------------|
| Retired workers.....                   | \$488                          |
| Spouses.....                           | 252                            |
| Children.....                          | 204                            |
| Disabled workers.....                  | 488                            |
| Spouses.....                           | 131                            |
| Children.....                          | 141                            |
| Survivors:                             |                                |
| Widows and widowers (nondisabled)..... | 444                            |
| Disabled widows and widowers.....      | 320                            |
| Mothers and fathers.....               | 338                            |
| Children.....                          | 337                            |

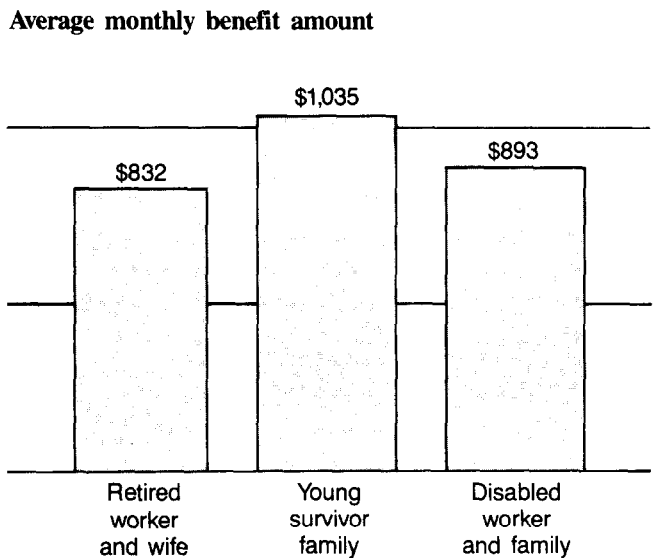
Source: *Monthly Benefit Statistics*, No. 12, February 1987, table 1.

**Family benefit amounts, December 1986.** The December 1986 average monthly benefit amount for a retired worker and his wife receiving benefits based on his earnings record was \$832. A disabled worker and his or her family received an average of \$893.

| Beneficiary unit               | Average monthly benefit amount* |
|--------------------------------|---------------------------------|
| Retired worker, alone.....     | \$477                           |
| Retired worker and wife.....   | 832                             |
| Aged widow or widower.....     | 444                             |
| Young survivor family.....     | 1,035                           |
| Disabled worker, alone.....    | 488                             |
| Disabled worker and family.... | 893                             |

\* Estimates.

Source: Office of the Actuary, Social Security Administration.





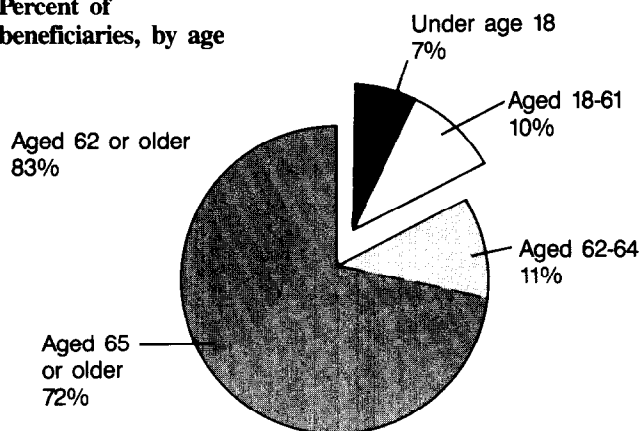
## Beneficiaries by Age

### Age of persons receiving benefits, December 1986.

Some 83 percent of all those with benefits in current-payment status were aged 62 or older in December 1986—91 percent of those receiving Old-Age and Survivors benefits and 16 percent of those receiving Disability Insurance benefits. About 7 percent were under age 18—5 percent of the Old-Age and Survivors Insurance program beneficiaries and 23 percent of the Disability Insurance program beneficiaries (the latter almost entirely children of disabled workers).

| Age  | Total  | OASI   | DI    |
|--|--------|--------|-------|
| Total number with benefits in current-payment status (in thousands)... | 37,708 | 33,715 | 3,993 |
| Total percent.....   | 100    | 100    | 100   |
| Under age 18.....  | 7      | 5      | 23    |
| Aged 18-61.....  | 10     | 4      | 61    |
| Aged 62 or older.....  | 83     | 91     | 16    |
| 62-64.....   | 11     | 10     | 15    |
| 65 or older.....   | 72     | 81     | 1     |

Percent of beneficiaries, by age



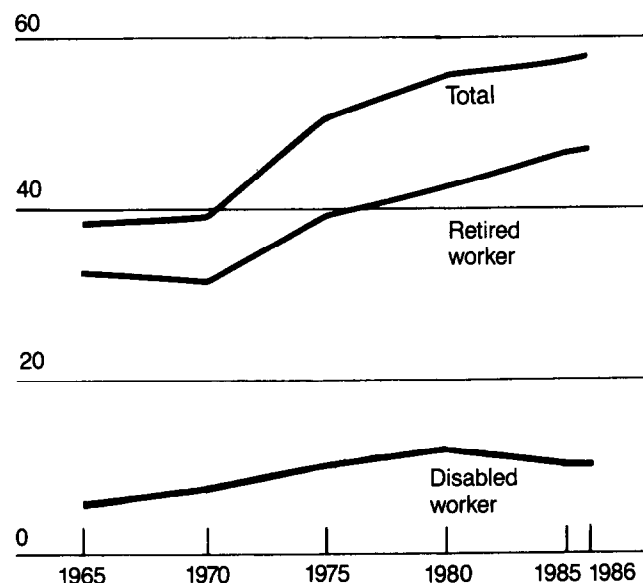
**Percent of insured persons aged 62 or older receiving benefits, by age, 1965-86.** The proportion of insured persons receiving benefits at ages 62 to 64 has been increasing. In 1986, more than half of those who were insured for retired- or disabled-worker benefits were receiving them at ages 62 to 64. By age 72, virtually all persons who were insured for benefits were receiving them.

Percent of insured with benefits in current-payment status

| Year and sex | Total, aged 62-64 | Retired workers, aged 62-64 | Disabled workers, aged 62-64 | Aged 65-71 | Aged 72 or older |
|--------------|-------------------|-----------------------------|------------------------------|------------|------------------|
| 1965.....    | 38                | 32                          | 6                            | 80         | 100              |
| 1970.....    | 39                | 31                          | 8                            | 80         | 100              |
| 1975.....    | 50                | 39                          | 11                           | 85         | 99               |
| 1980.....    | 55                | 42                          | 13                           | 89         | 99               |
| 1985.....    | 57                | 46                          | 11                           | 88         | 99               |
| 1986.....    | 58                | 47                          | 11                           | 87         | 99               |
| Men.....     | 57                | 44                          | 13                           | 90         | 100              |
| Women...     | 58                | 50                          | 8                            | 85         | 99               |

Source: Annual Statistical Supplement, 1986, table 34.

Percent of insured persons receiving benefits at age 62-64



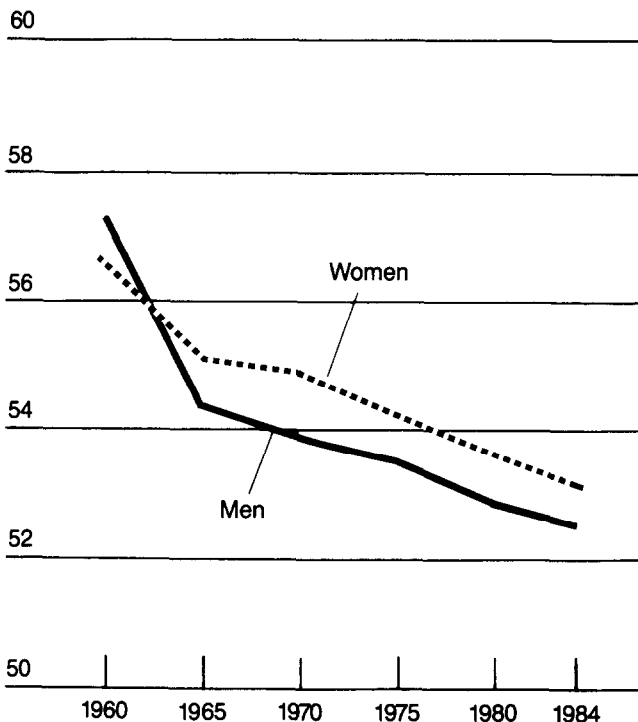
## Beneficiaries by Sex

**Age of disabled-worker beneficiaries, 1960-84.** The average age of disabled-worker beneficiaries has declined somewhat since Disability Insurance benefits became available to persons younger than age 50 in 1960. In that year, the average age of a male disabled worker was 57.3 years. By 1984, the average age had declined to 52.5 years. Among female disabled workers, the average age was 56.7 years in 1960 and 53.2 years in 1984.

| Year      | Average age |       |
|-----------|-------------|-------|
|           | Men         | Women |
| 1960..... | 57.3        | 56.7  |
| 1965..... | 54.4        | 55.2  |
| 1970..... | 53.9        | 55.0  |
| 1975..... | 53.5        | 54.4  |
| 1980..... | 52.9        | 53.7  |
| 1984..... | 52.5        | 53.2  |

Source: Annual Statistical Supplement, 1986, table 98.

### Average age of disabled-worker beneficiaries



**Sex of persons receiving monthly benefits, December 1986.** Of all adults receiving monthly Social Security benefits at the end of 1986, 41 percent were men and 59 percent were women. Fifty-three percent of the retired workers and 67 percent of the disabled workers were men. Among adult survivor beneficiaries and spouses of workers, 99 percent were women.

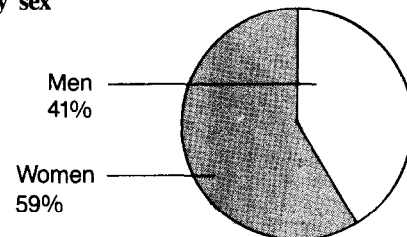
[Numbers in thousands]

| Beneficiary          | Total number | Total percent |       |    |
|----------------------|--------------|---------------|-------|----|
|                      |              | Men           | Women |    |
| Total* .....         | 34,963       | 100           | 41    | 59 |
| Retired workers..... | 22,987       | 100           | 53    | 47 |
| Disabled workers.... | 2,727        | 100           | 67    | 33 |
| Spouses of workers.. | 3,388        | 100           | 1     | 99 |
| Adult survivors**... | 5,290        | 100           | 1     | 99 |

\*Also includes disabled adult children, parents, and special age-72 beneficiaries.

\*\*Includes aged and disabled widows and widowers and mothers and fathers.

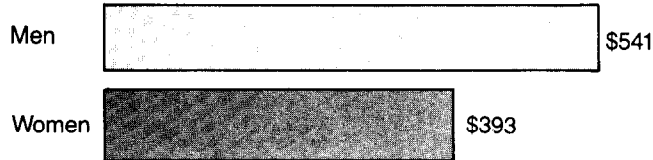
### Percent of beneficiaries, by sex



**Average monthly benefit amounts for those receiving benefits, December 1986.** Monthly benefits for retired workers averaged \$550 for men and \$420 for women in December 1986. Among disabled-worker beneficiaries, men received an average of \$539 and women, \$384.

| Beneficiary                               | Men   | Women |
|---|-------|-------|
| Total .....                               | \$541 | \$392 |
| Retired workers.....                      | 550   | 420   |
| Spouses .....                             | 170   | 253   |
| Disabled workers.....                     | 539   | 384   |
| Spouses .....                             | 82    | 132   |
| Survivors:                                |       |       |
| Widows and widowers<br>(nondisabled)..... | 326   | 445   |
| Disabled widows and<br>widowers .....     | 196   | 321   |
| Mothers and fathers.....                  | 205   | 345   |

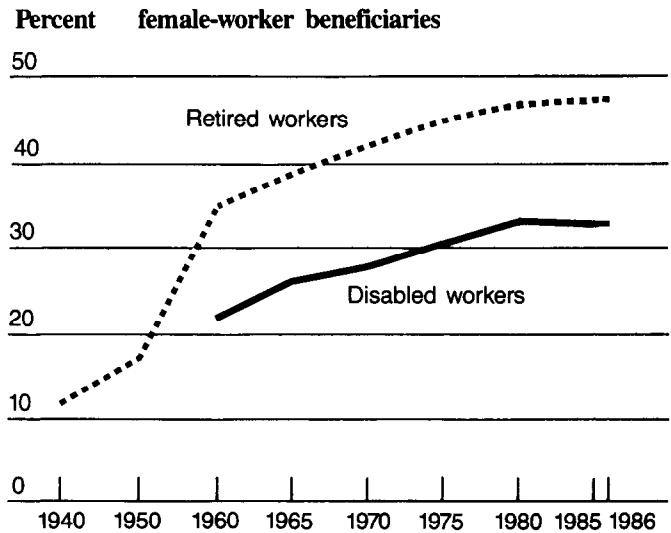
**Average monthly benefit amounts for adult men and women**



**Female-worker beneficiaries, 1940-86.** The proportion of women among disabled- and retired-worker beneficiaries has increased substantially. The proportion of women disabled-worker beneficiaries increased from 22 percent in 1960 to 33 percent in 1986, and the proportion of women retired-worker beneficiaries has increased from 12 percent to 47 percent since 1940.

[Numbers in thousands]

| Year       | Retired workers |                | Disabled workers |                |
|------------|-----------------|----------------|------------------|----------------|
|            | Total number    | Percent female | Total number     | Percent female |
| 1940 ..... | 112             | 12             | ...              | ...            |
| 1950 ..... | 1,771           | 17             | ...              | ...            |
| 1960 ..... | 8,061           | 35             | 455              | 22             |
| 1965 ..... | 11,101          | 39             | 998              | 26             |
| 1970 ..... | 13,349          | 42             | 1,493            | 28             |
| 1975 ..... | 16,588          | 45             | 2,489            | 31             |
| 1980 ..... | 19,562          | 47             | 2,859            | 33             |
| 1985 ..... | 22,432          | 47             | 2,656            | 33             |
| 1986 ..... | 22,987          | 47             | 2,727            | 33             |



Source: Annual Statistical Supplement, 1986, tables 77, 88, 98, and Office of Research and Statistics, Social Security Administration.

## Medicare

**Dual entitlement, 1960-85.** The proportion of women aged 62 or older who are receiving benefits based only on their husband's or deceased husband's earnings has been declining—from 57 percent in 1960 to 41 percent in 1985. At the same time, the proportion of women entitled on the basis of their own earnings record and that of their husband has been increasing—from 5 percent in 1960 to 20 percent in 1985. The proportion entitled only on the basis of their own earnings has been fairly constant since 1960.

### Receipt of benefits by women aged 62 or older, 1960-85

| Type of entitlement                                   | 1960 | 1970 | 1980 | 1985 |
|---|------|------|------|------|
| Total number of beneficiaries (in millions) . . . . . | 6.6  | 11.4 | 16.4 | 18.4 |
| Total percent . . . . .                               | 100  | 100  | 100  | 100  |
| Worker . . . . .                                      | 43   | 51   | 57   | 59   |
| Worker only . . . . .                                 | 38   | 42   | 41   | 39   |
| Dual . . . . .  | 5    | 9    | 16   | 20   |
| Auxiliary only . . . . .                              | 57   | 49   | 43   | 41   |

### Aged and Disabled Persons Enrolled in Medicare Program, 1984

Of 27.6 million aged persons enrolled for Medicare Hospital Insurance (HI) and/or Supplementary Medical Insurance (SMI) in 1984, 69 percent received services that were reimbursed by the program. Of those enrolled, HI served 24 percent and SMI served 70 percent. In 1984, 3 million disabled persons were enrolled in the Medicare program. Disabled persons were as likely as the aged to receive services from HI (24 percent of the enrollees in each group) but somewhat less likely than the aged (64 percent, compared with 70 percent of the enrollees) to receive services from SMI.

|   | [Numbers in thousands] |                |                |
|---|------------------------|----------------|----------------|
| Medicare program                          | Persons enrolled       | Persons served | Percent served |
| <b>Aged</b>                               |                        |                |                |
| Total . . . . .                           | 27,589                 | 18,904         | 69             |
| Hospital Insurance . . . . .              | 26,700                 | 6,496          | 24             |
| Supplementary Medical Insurance . . . . . | 26,600                 | 18,706         | 70             |
| <b>Disabled</b>                           |                        |                |                |
| Total . . . . .                           | 2,925                  | 1,845          | 63             |
| Hospital Insurance . . . . .              | 2,891                  | 700            | 24             |
| Supplementary Medical Insurance . . . . . | 2,651                  | 1,812          | 64             |

Source: Health Care Financing Administration.

## Medicaid

### Medicare Reimbursement Amounts, 1984

Medicare reimbursements per person served were higher for disabled beneficiaries (\$3,621) than for aged beneficiaries (\$2,616).

| Medicare program                      | Amounts reimbursed per person served |                    |
|---------------------------------------|--------------------------------------|--------------------|
|                                       | Aged enrollees                       | Disabled enrollees |
| Total .....                           | \$2,616                              | \$3,621            |
| Hospital Insurance.....               | 5,144                                | 5,984              |
| Supplementary Medical Insurance ..... | 857                                  | 1,374              |

Source: Health Care Financing Administration (advance data).

### Medicaid Recipients, 1985

Close to half of the 21.8 million Medicaid recipients in 1985 were dependent children under age 21. One-fourth were adults in the families of these children. The remainder were primarily aged, blind, or disabled adults.

|  |        |
|--|--------|
| Total number (in thousands).....           | 21,808 |
| Total percent.....                         | *      |
| Aged .....                                 | 14     |
| Blind .....                                | **     |
| Disabled .....                             | 13     |
| Dependent child under age 21.....          | 45     |
| Adults in families with dependent child... | 25     |
| Other .....                                | 6      |

\* Percents sum to more than 100 because some recipients were in more than one category.

\*\* Less than 0.5 percent.

Source: Health Care Financing Administration.

### Medicaid Payments, 1985

Although they accounted for only 29 percent of all Medicaid recipients, the aged, blind, and disabled received 74 percent of the payments in 1985. Dependent children accounted for 12 percent of the payments and adults in their families for 13 percent.

|  |          |
|--|----------|
| Total amount (in millions).....            | \$37,508 |
| Total percent.....                         | 100      |
| Aged .....                                 | 38       |
| Blind .....                                | 1        |
| Disabled .....                             | 5        |
| Dependent child under age 21.....          | 12       |
| Adults in families with dependent child... | 13       |
| Other .....                                | 2        |

Source: Health Care Financing Administration.

# Supplemental Security Income

## Federally Administered SSI Payments, 1986

About 4.3 million persons received federally administered Supplemental Security Income (SSI) payments in 1986. Sixty percent received Federal payments only, 32 percent received both Federal payments and State supplementation, and 8 percent received State supplementation only.

[Numbers in thousands]

| Type of payment                        | Total number | Total percent |
|--|--------------|---------------|
| Recipients, total*.....                | 4,269        | 100           |
| Federal SSI.....                       | 3,922        | 92            |
| Federal SSI only.....                  | 2,546        | 60            |
| Federal SSI and State supplement ..... | 1,376        | 32            |
| State supplementation only....         | 348          | 8             |

\* In addition, approximately 62,000 persons received State-administered SSI payments.

## Distribution of SSI Payments, 1986

Although persons entitled on the basis of disability accounted for 64 percent of all Supplemental Security Income (SSI) recipients, they received 73 percent of the \$11.7 billion in federally administered payments in 1986. They received a smaller share (63 percent) of federally administered State supplements than of Federal payments (75 percent).

| Basis for eligibility           | Total    | Federal SSI payment | Federally administered State supplement |
|---------------------------------|----------|---------------------|---|
| Total amount (in millions)..... | \$11,741 | \$9,498             | \$2,243                                 |
| Total percent.....              | 100      | 100                 | 100                                     |
| Aged.....                       | 25       | 23                  | 34                                      |
| Blind.....                      | 2        | 2                   | 3                                       |
| Disabled.....                   | 73       | 75                  | 63                                      |

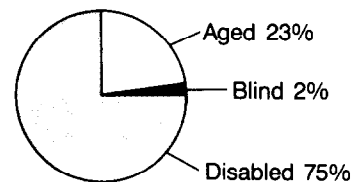
## SSI Recipients, by Basis for Eligibility and Age, 1986

Slightly more than one-third (34 percent) of the SSI recipients were eligible on the basis of age; 64 percent were eligible on the basis of disability. Less than one-half of all SSI recipients were aged 65 or older. Among those entitled on the basis of disability, 19 percent were aged 65 or older.

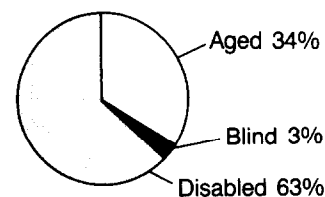
[Numbers in thousands]

| Basis for eligibility | Total number | Total percent | Percent aged 65 or older |
|-----------------------|--------------|---------------|--------------------------|
| Recipients, total ... | 4,269        | 100           | 47                       |
| Aged .....            | 1,473        | 34            | 100                      |
| Blind .....           | 83           | 2             | 28                       |
| Disabled .....        | 2,713        | 64            | 19                       |

Federal SSI payments



Federally administered State supplements



## Average SSI Payment Amounts, 1986

The disabled received a disproportionately large share of Supplemental Security Income (SSI) payments because their average payment was higher than that of the aged. Disabled recipients received somewhat higher payments because they are less likely than the aged to receive Social Security benefits or other unearned income. The average federally administered payment for a disabled individual was \$284 a month in 1986, compared with \$176 for an aged individual.

| Basis for eligibility | Total | Federal SSI payment | Federally administered State supplement |
|-----------------------|-------|---------------------|---|
| <b>Aged:</b>          |       |                     |   |
| Individual . . . . .  | \$176 | \$151               | \$107                                   |
| Couple . . . . .      | 322   | 246                 | 289                                     |
| <b>Blind:</b>         |       |                     |   |
| Individual . . . . .  | 286   | 235                 | 159                                     |
| Couple . . . . .      | 438   | 320                 | 379                                     |
| <b>Disabled:</b>      |       |                     |   |
| Individual . . . . .  | 284   | 249                 | 118                                     |
| Couple . . . . .      | 370   | 299                 | 288                                     |

## SSI Recipients by Age, 1974-86

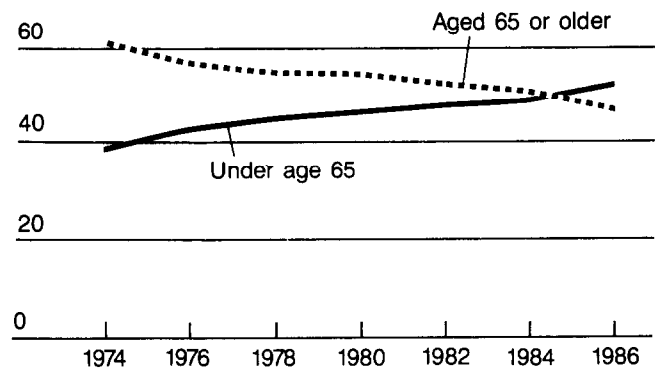
Shortly after the Supplemental Security Income (SSI) program began in 1974, the number of persons receiving federally administered payments quickly rose to 4 million. It has remained at about that level throughout the succeeding years. However, the proportion of SSI recipients aged 65 or older has declined from 61 percent in January 1974 to 47 percent in December 1986.

[Numbers in thousands]

| Year*          | Total number | Total percent | Aged 65 or older | Under age 65 |
|----------------|--------------|---------------|------------------|--------------|
| 1974 . . . . . | 3,216        | 100           | 61               | 39           |
| 1976 . . . . . | 4,236        | 100           | 57               | 43           |
| 1978 . . . . . | 4,217        | 100           | 55               | 45           |
| 1980 . . . . . | 4,142        | 100           | 54               | 46           |
| 1982 . . . . . | 3,858        | 100           | 52               | 48           |
| 1984 . . . . . | 4,029        | 100           | 51               | 49           |
| 1986 . . . . . | 4,269        | 100           | 47               | 53           |

\*Numbers are for January in 1974 and for December in all other years.

Percent of SSI recipients, by age

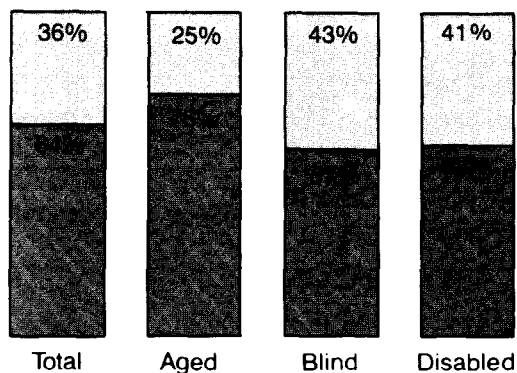


## SSI Recipients by Sex, 1986

In 1986, the majority of those receiving federally administered Supplemental Security Income (SSI) payments were women (three-fourths of those entitled on the basis of age and three-fifths of those entitled on the basis of disability).

| Sex                                   | Total | Basis for eligibility |       |          |
|---------------------------------------|-------|-----------------------|-------|----------|
|                                       |       | Aged                  | Blind | Disabled |
| Total number (in thousands) . . . . . | 4,269 | 1,473                 | 83    | 2,713    |
| Total percent . . . . .               | 100   | 100                   | 100   | 100      |
| Men . . . . .                         | 36    | 25                    | 43    | 41       |
| Women . . . . .                       | 64    | 75                    | 57    | 59       |

### Percent of SSI recipients —



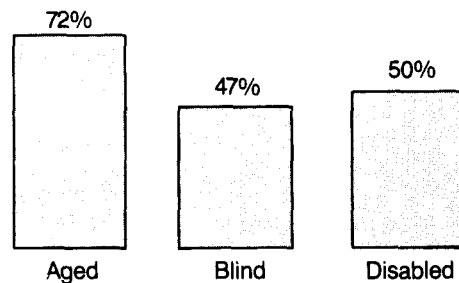
## SSI Recipients by Marital Status, 1986

Only 5 percent of Supplemental Security Income (SSI) recipient units are couples in which both spouses receive a payment. The majority—57 percent—are single women.

| Unit and marital status                             | Basis for eligibility |       |       |          |
|---|-----------------------|-------|-------|----------|
|   | Total                 | Aged  | Blind | Disabled |
| Total number* (in thousands) . . . . .              | 4,006                 | 1,328 | 79    | 2,598    |
| Total percent . . . . .                             | 100                   | 100   | 100   | 100      |
| Men not living with spouse . . . . .                | 25                    | 15    | 29    | 30       |
| Women not living with spouse . . . . .              | 57                    | 72    | 47    | 50       |
| Individuals living with ineligible spouse . . . . . | 6                     | 3     | 9     | 7        |
| Couples . . . . .                                   | 5                     | 9     | 5     | 3        |
| Children . . . . .                                  | 7                     | ...   | 10    | 10       |

\* Excluded are persons with recent adult unit classification changes.

### Women not living with spouse as a percent of adult SSI recipients





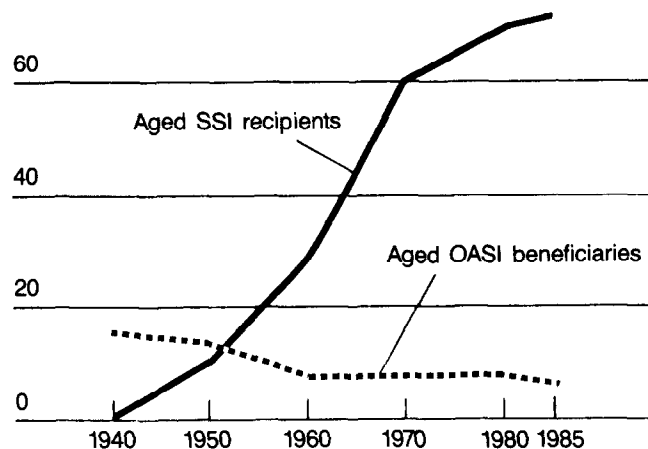
## Aged Persons Receiving Both SSI and Social Security Payments, 1940-85

As an increasing proportion of aged persons receives OASI benefits, a declining proportion receives means-tested old-age payments. In 1940, only 7 in 1,000 persons aged 65 or older received OASI benefits and 217 in 1,000 received Old-Age Assistance. In 1985, 915 out of every 1,000 aged persons received OASI benefits, but only 71 in 1,000 received Supplemental Security Income payments. The proportion of aged recipients of means-tested payments who also received OASI benefits increased from less than 1 percent in 1940 to 71 percent in 1984.

| Year      | Number per 1,000 receiving— |      | Receiving both SSI and OASI as a percent of— |                |
|-----------|-----------------------------|------|--|----------------|
|           | OASI                        | SSI* | OASI beneficiaries                           | SSI recipients |
| 1940..... | 7                           | 217  | 14   | **             |
| 1950..... | 164                         | 224  | 13   | 10             |
| 1960..... | 616                         | 141  | 7  | 28             |
| 1970..... | 855                         | 104  | 7  | 60             |
| 1980..... | 914                         | 87   | 7  | 70             |
| 1985..... | 915                         | 71   | 6  | 71             |

\* Data for 1940-74 refer to the Old-Age Assistance program.  
 \*\* Less than 1 percent.

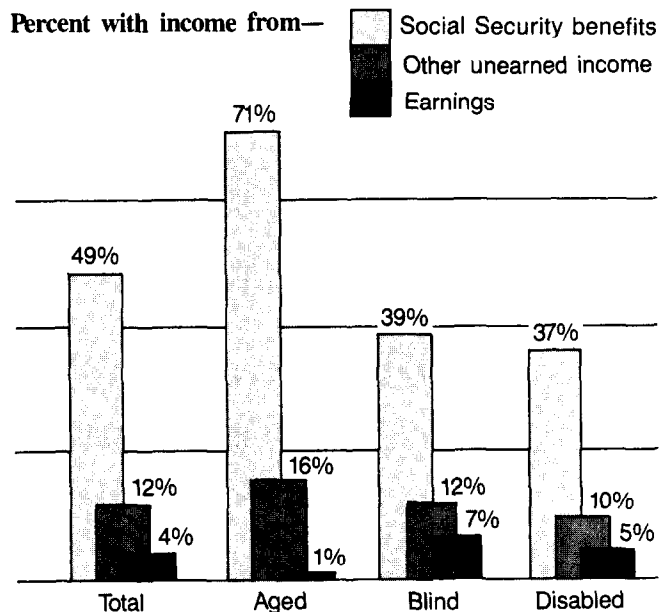
Recipients of both payments as a percent of—



## Receipt of Other Income by SSI Recipients, 1986

Although almost half of all Supplemental Security Income (SSI) recipients also received Social Security benefits, most did not have any other income in 1985. For 4 percent of the recipients, earnings were the source of additional income, and 12 percent had income from other sources, such as veterans' pensions or assets.

| Income source                 | Total | Basis for eligibility |       |    |
|-------------------------------|-------|-----------------------|-------|----|
|                               |       | Aged                  | Blind |    |
| Percent with income from—     |       |                       |       |    |
| Social Security benefits..... | 49    | 71                    | 39    | 37 |
| Other unearned income.....    | 12    | 16                    | 12    | 10 |
| Earnings.....                 | 4     | 1                     | 7     | 5  |



## Aid to Families with Dependent Children

### AFDC Recipients, 1960-86

The number of families receiving Aid to Families with Dependent Children (AFDC) grew from 787,000 in 1960 to almost 3.8 million in December 1986. The total number of recipients rose from 3.0 million to 11.0 million during the same period.

| Year             | [Numbers in thousands] |          |          |
|------------------|------------------------|----------|----------|
|                  | Recipients             |          |          |
|                  | Total                  | Families | Children |
| 1960 .....       | 3,005                  | 787      | 2,314    |
| 1970 .....       | 8,466                  | 2,208    | 6,214    |
| 1980 .....       | 10,774                 | 3,712    | 7,419    |
| December 1986... | 11,042                 | 3,770    | 7,424    |

Source: **Annual Statistical Supplement, 1986**, table 204, and Office of Family Assistance, Family Support Administration.

### AFDC Payment Amounts, 1960-86

Payments under the program of Aid to Families with Dependent Children (AFDC) totaled \$15,960 million in 1986. The average monthly payment amount per family was \$354; the amount per recipient was \$121.

| Year           | [Amount of payments in 1986 dollars] |        |           |
|----------------|--------------------------------------|--------|-----------|
|                | Monthly average per—                 |        |           |
|                | Total<br>(in millions)               | Family | Recipient |
| 1960 .....     | \$3,717                              | \$393  | \$103     |
| 1970 .....     | 13,749                               | 520    | 135       |
| 1980 .....     | 16,655                               | 374    | 129       |
| 1986 (est.)... | 15,960                               | 354    | 121       |

Source: Derived from **Annual Statistical Supplement, 1986**, table 204, and Office of Family Assistance, Family Support Administration.

