

CHAPTER Bf

Social Insurance and Public Assistance

Editor: Price V. Fishback

Associate Editors: Joan Underhill Hannon, Melissa A. Thomasson, and Stephen T. Ziliak

INTRODUCTION

Price V. Fishback

Social welfare spending is a broad category that includes provisions for maintaining health, income, and welfare in good times and bad. The category covers a wide range of types of spending: assistance to the poor; social insurance expenditures in programs such as Social Security, unemployment insurance, and workers' compensation; private purchases of health and life insurance; and direct expenditures on health care and education. Decisions on social welfare spending are made both by governments through public programs and by individuals in their private decisions about how much to spend on charity, insurance, education, and their own health. Prior to the twentieth century, social welfare spending was largely the responsibility of individuals, extended families, and cities and towns. In consequence, we have only limited and scattered quantitative evidence on the extent of public assistance programs, and we know relatively little about the share of private spending devoted to the general category. Our sense is that social welfare spending was a smaller proportion of overall spending in the eighteenth and nineteenth centuries than in the twentieth century. Certainly, the extent of public programs was much smaller. Much more research needs to be done before we can develop a comprehensive picture of the nature of social welfare spending prior to the 1920s.

As the American economy developed, more centralized layers of government began to accept responsibility for public programs for social welfare spending. For example, during the nineteenth century towns and later states began to develop educational programs for children, while in the Progressive era in the late nineteenth and early twentieth centuries, state governments began establishing workers' compensation and mothers' pensions programs. The federal government became more heavily involved

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with social welfare spending during the Great Depression, and the levels of social welfare spending both public and private have expanded rapidly since. The rise in federal activity has also led to expanded efforts to collect data on social welfare activities. Most of the evidence on social welfare spending at the national level has been collected and developed by the Social Security Administration, which was formed in the 1930s. Thus, we have a relatively comprehensive picture of social welfare spending from approximately 1929 to the present. We have several goals in this chapter: first, to provide in one place a consistent set of time series over a long period that show the extent and nature of public assistance available in various cities and states in the nineteenth century; second, to give a sense of the nature of both public programs and private spending described by the social welfare statistics of the twentieth century; third, to examine long-term trends in social welfare spending in the context of changes in the economy; and finally, to warn users about features that may cause peculiarities in the data.

PUBLIC ASSISTANCE: COLONIAL TIMES TO THE 1920S

Stephen T. Ziliak with Joan Underhill Hannon

The category of social welfare expenditure called public assistance includes all types of noncontributory, tax-financed payments of relief to the poor. Payments of public assistance are made sometimes in cash and sometimes in kind, both to the poor who reside in households and to the poor who reside in institutions. For example, the present-day "food stamp," had it been in circulation from colonial times to the 1920s, would be counted here as public assistance in kind. Until the 1920s, all payments in cash and in kind were called

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public outdoor relief, or just outrelief.¹ By contrast with outdoor relief, the “poorhouse” is counted by the Census Bureau and here as an institution of indoor relief, an almshouse where the poor reside at public expense.

Public Assistance Began in Colonial Times

A common misconception concerning the origin of taxation for public assistance is that it was born of the deep and persistent unemployment of the Great Depression, and that its first cry was President Roosevelt’s signing of the Social Security Act in 1935. In fact, public assistance for the poor, a compulsory tax for both indoor and outdoor relief, can be traced without interruption to colonial times.

The first schemes of public assistance in the New World were influenced by British examples, the financial and legal responsibility for the destitute being assumed by the town, the parish, or the county. Indeed, the colonies stayed close to the spirit of Britain’s “43rd of Elizabeth,” the so-called Elizabethan Poor Law of 1601.² The Elizabethan Poor Law laid the basis in England for the English poor law system. It also laid the basis for poor laws in the British colonies of America. The colony of Rhode Island, for instance, would adopt the Elizabethan Poor Law with hardly a revision. The Act made it compulsory for each “parish” (or town) to provide for the poor by levying a rate on property held within the jurisdiction. The Act set in motion the idea that public responsibility for the poor should be guaranteed through a program of compulsory taxation. It enabled various means of providing tax-financed relief, including but not limited to outdoor relief for the aged and infirm poor, apprenticing of pauper children to farmers, and construction of poorhouses for the able-bodied. Administration was to be the responsibility of an unpaid “overseer of the poor.” There were exceptions to the British pattern. In the colony of New Netherland (1609–1664), the ecclesiastical practice of the Dutch Reformed Church put a profound stamp upon colonial poor laws, and the Dutch system was only gradually replaced by an English system in developing New York (Schneider 1938, Chapter 1).

More so than would Britain, the American colonies, and then later the states, would adjust the poor laws to facilitate differences in local or regional economic conditions and culture. Thus, for example, the little-known municipal practice of “auctioning” the poor had faded from much of New England by the late 1820s, and yet auctioning did not leave a less settled Indiana until the 1840s (Shaffer, Keefer, and Breckinridge 1941, pp. 12–41; Ziliak 2003). Indeed, ridding a burdened house of its children at auction to the lowest bidder (lowest, because the tax would subsidize the taker) was a legal form of assistance in Arkansas as late as 1903 (U. S. Department of Commerce and Labor 1906, p. 41). And while poorhouses could be found in New England in the late seventeenth century, the Old Northwest Territories would not see the poorhouse as common until the 1830s.

Quantitative research on public assistance in colonial America is relatively scant. But clearly, as one can see in the work of Professor Gary Nash on Boston, Philadelphia, and New York

City, American struggles with poverty, and collective strategies to deal with it, came early (see Tables Bf1–16). While the Continental Congress “was debating independence in the handsome brick statehouse at Fifth and Chestnut streets, the managers of the Philadelphia almshouse, eight blocks away, were penning a doleful report on the care of the poor. In it they admitted their doubt that they could any longer cope with the spiraling problem of poverty and disclosed that ‘of the 147 Men, 178 women, and 85 Children [admitted to the almshouse during the previous year] most of them [are] naked, helpless and emaciated with Poverty and Disease to such a Degree, that some have died in a few Days after their Admission.’”³ The almshouse in colonial Philadelphia, like most almshouses throughout the entire antebellum period, was a miscellaneous receptacle for human distress. One almshouse could serve as a hostel, a hospice, and a home for the disabled. The immigrant widow and the common laborer could share quarters with the insane, the helpless, and the emaciated, as they did in colonial Philadelphia.

From colonial times to the present, the history of public assistance is in part a history of increasingly specialized “goods” and “services” being redistributed to increasingly diverse populations. Taking the long view, it is a history of an increasingly centralized system of administration and finance, evolving from the township trustee to the federal government, from local property taxes to the federal income tax. But in closer range, the history of public assistance is in many regards what historians call a “nonlinear” history, a story filled with surprising switchbacks and sometimes radical reversals. The tables published here give but a small sense of the uneven appearance of quantitative data across time and space, an indication of the sometimes vast difference in the practices of local and regional care for the poor.

County Asylums Dominated the Discourse of Poverty in the Nineteenth Century, Although Outdoor Relief Was More Often Provided

The volume of quantitative evidence increases as one proceeds to the 1820s and beyond. The work of Joan Underhill Hannon, although limited to the state of New York, provides evidence on local and regional difference in care for the poor since the 1820s (Tables Bf156–187). A large and economically diverse state, the New York of the nineteenth century is fertile ground for studying the influence of industrialization, urbanization, commercialization, and immigration on both dependency rates and local relief policy. The state as a whole is clearly not representative of the nation with respect to any of these factors. But the urban–rural variation *within* New York State is suggestive both of the variation one might expect to find across states and of the ways in which one might expect New York’s history to be unique.

Throughout the nineteenth century, dependency rates – or what officials called the “pauperism rates”⁴ – and relief expenditures per capita were higher in New York City than in the rest of the state. But over the course of the century, pauperism grew more rapidly outside of the city. In 1823, New York City’s pauperism

¹ “Relief” replaced the older terms for a short time in the 1930s before “welfare” gained currency for the rest of the century.

² Trattner (1974), Chapters 1–3; Webb and Webb (1927); Rose (1971). Also see Table Bf-A.

³ Nash (1976a), p. 4; *Philadelphia Gazette*, May 29, 1776. While this chapter was in the final stages of preparation, some quantitative evidence on pauper apprenticeship began to emerge. See, in particular, Murray and Herndon (2001).

⁴ The pauperism rate is defined as the ratio of public relief recipients to the size of the state population.

TABLE Bf-A Important legislation and events affecting social welfare policy: 1601–1997

1601	Elizabethan Poor Law: The “43rd of Elizabeth” laid the basis for the Poor Laws in England and in the British colonies of America. The Act set in motion the idea that public responsibility for the poor should be guaranteed through a program of compulsory taxation.
1610–1660	Sieckentroosters and Dutch Poor Relief in New Netherland: The Dutch colony of New Netherland (New York) established public responsibility for the poor, financed by donations to the Dutch Reformed Church. As early as 1626, two “sieckentroosters” were employed by the Church to visit and comfort the sick of present-day Manhattan, perhaps as America’s first social workers.
1662	Act of Settlement: Applicants for public assistance had to prove residence in the parish or town to which they applied. The Act connected the idea of entitlement to relief to the prerequisite of local residence. Settlement laws were passed and enforced in the United States throughout the nineteenth and twentieth centuries.
1775	First military pension program established by the Continental Congress. Set the precedent for military pensions for future wars.
1787	Free African Society organized by Richard Allen and Absalom Jones, in Philadelphia. The Society was a self-help and charitable organization for blacks. It was probably the first success among what would become a long line of independent black social organizations.
1824	New York’s Act to Provide for the Establishment of County Poorhouses established that New York counties were to build poorhouses to provide shelter to applicants for public assistance. A number of states in New England, the Middle Atlantic, and the Middle West passed similar legislation during the antebellum period.
1862	Federal Civil War Disability Pensions were established for regular recruits and volunteers in the Union Army. Initially, the criteria for the eligibility and size of pensions were strictly tied to service-related injuries. The Arrears Act of 1879 loosened that tie, and the 1890 Dependent Pension Act ended it. By 1910, 28 percent of all men aged 65 and over and some 300,000 widows, orphans, and other dependents received benefits from veterans’ pension programs.
1863	Massachusetts established the first Board of State Charities. Between 1863 and the 1900s, individual states established a central authority over the state’s institutions of public assistance. In many states, the central authority administered corrections, health, and lunacy, in addition to public assistance.
1865	New York State legislature authorized the establishment of the Willard Asylum, the first state hospital for the chronically mentally ill, preparing the state for the removal of mentally ill paupers from poorhouses to state hospitals.
1874	The first annual National Conference on Charities and Corrections (NCCC) brought together leaders of the nation’s public relief and private charitable organizations to discuss the similarity of their problems. The Charity Organization Society (COS), a quasi-private organization, dominated the agenda of the NCCC until 1905 when Jane Addams, a Progressive and a leader of the settlement house movement, was elected as its president.
1874	First private pension program established by railroads.
1875	The New York Children’s Act ordered the removal of all children between the ages of 2 and 16 from poorhouses to orphanages and other facilities. Other states passed similar acts over the last quarter of the nineteenth century. Reaction to the resulting family breakup and overcrowding of orphans’ homes provided a basis for the Progressive era movement toward Mothers’ Pensions.
1877	The first COS was established in Buffalo, New York. During the last quarter of the nineteenth century, the COS led the movement that would abolish public outdoor relief in ten of the largest cities and bring sharp reductions to many other cities. The COS sought to replace public assistance with a voluntaristic and “scientific charity” based on distinctions between the “worthy” and the “unworthy” poor. By 1893, there was a COS in one hundred cities across the nation.
1880	New York State Care Act: The Act required that all of the mentally ill in county institutions be moved to state hospitals and that the state assume complete responsibility for care of the insane poor. Other states created similar legislation during the late nineteenth century.
1893–1894	An early experiment with public works: With the initiative of their COSs, the municipalities of Indianapolis and New York City used tax dollars to put to work many thousands of adults who had been thrown out of work during the depression.
1899	Charity Organization Society and the State of Indiana. The Indiana Legislature directed the Indiana Board of State Charities to implement the principles of the COS.
1908	Federal Employers Liability Act declared unconstitutional. The Act increased the range of accidents for which railroad employers were required to make payments to injured workers by limiting their legal defenses in lawsuits.
1908	Provision of workers’ compensation to federal employees involved in workplace accidents.
1911	First permanent workers’ compensation acts passed by California, Illinois, Kansas, Massachusetts, New Hampshire, New Jersey, Ohio, Washington, and Wisconsin. Most other states and territories established the program over the next nine years. Mississippi was the last to establish a program in 1948. Workers’ compensation provided payments to the families of workplace accident victims and took the place of the earlier common law rules based on employer liability.
1911	First state Mothers’ Pension law passed in Illinois. By 1920, forty states had established mothers’ pensions to provide regular payments to impoverished mothers of dependent children. These programs served as a model for the Aid to Dependent Children program established by the Social Security Act of 1935.
1915	First state Old-Age Pension law passed by Alaskan territory. Provided pensions for elderly with low incomes to allow them to live outside the almshouse. By 1934, thirty states and territories had passed legislation.

(continued)

TABLE Bf-A Important legislation and events affecting social welfare policy: 1601–1997 *Continued*

1917	First state department of public welfare established in Illinois to increase state financing and control of public assistance. Other states developed public welfare departments in the 1920s.
1920	Civil Service Retirement Act. Established a regular system of pensions for all federal government employees.
1920	State–federal rehabilitation programs first enacted under the Smith–Fess Act.
1921	Shephard–Towner Act passed to provide federal grants to states to improve public health programs. Program ended by 1930.
1932	Reconstruction Finance Corporation established. Among its many tasks, the RFC made loans to local governments to help finance public assistance and work relief.
1932	First state unemployment insurance law passed by Wisconsin, but no benefits were paid before the Social Security Act established the state–federal program in 1935.
1933	New Deal programs began providing emergency funding for work relief and direct relief of the unemployed.
1934	Federal Railroad Retirement pension program enacted. Declared unconstitutional and replaced by new law in 1935.
1935	First federal public housing project begins construction under the Public Works Administration’s Public Housing program.
1935	Social Security Act passed. The Act established the Old-Age, Survivors Insurance pension program and set up state–federal programs for unemployment insurance, old-age assistance, aid to the blind, and aid to dependent children.
1936	Veterans’ bonus of up to \$2 billion paid to World War I veterans.
1937	U.S. Housing Authority established to aid in the building of public housing.
1938	Federal Railroad Unemployment Insurance program enacted.
1939	Social Security Act amended to make the Old-Age, Survivors Insurance program a pay-as-you-go system in which current tax revenues fund payments to Social Security pension recipients.
1940	First Social Security Old-Age Insurance pension checks issued.
1946	Federal Railroad Disability Insurance program enacted.
1950	Farm and domestic employees and nonfarm self-employed persons are covered for first time under Social Security Old-Age Insurance pension program.
1950	Federal government establishes program to fund payments to medical vendors for care of low-income persons.
1950	Social Security Act amended to provide aid to the totally and permanently disabled.
1954	Self-employed farmers covered under Social Security pension program.
1959	First payments made under Social Security Disability Insurance program.
1960	Federal government initiated a program for medical assistance to the elderly.
1962	Aid to Families with Dependent Children (AFDC) superseded the aid to dependent children program as coverage expands to include adults caring for dependent children.
1962	First year that Food Stamps are provided for low-income persons under pilot program. First Food Stamp Act was passed in 1964.
1962	Manpower Development and Training Act along with the Equal Opportunity Act of 1964 established work-experience training programs.
1965	Legislation established the U.S. Department of Housing and Urban Administration.
1965	Medicaid program established to build upon and take over earlier programs for paying vendors for the provision of medical care to persons with low incomes.
1965	Medicare established to offer federal health insurance for the elderly.
1965	Omnibus Budget and Reconciliation Act (OBRA) homogenized resource limits across states and increased the AFDC benefit reduction rate to 100 percent.
1969	Black Lung Benefits program established by the federal government to provide disability payments to miners with black lung disease.
1969	Federal government established an emergency assistance program.
1972	Supplemental Security Income program superseded the old-age assistance, aid to the blind, and disability programs.
1972	The Women, Infants and Children program for nutritional supplementation was started as a pilot program and became permanent in 1974.
1973	Congress passed the Comprehensive Education and Training Act to replace earlier job training programs and to provide block grants for decentralized training.
1981	Low-Income Home Energy Assistance Program established to provide block grants to help low-income households meet their energy expenses.
1983	Job Training Partnership Act replaced Comprehensive Education and Training Act. Private industry councils work with county welfare agents to connect welfare-to-work with wage subsidies.
1987	Federal Employees Retirement System (FERS) established. The FERS offered a broader range of retirement benefits than the original Civil Service Retirement System.
1988	Family Support Act. Attempted to change welfare programs from eligibility and monitoring programs to explicit programs for moving households into self-sufficiency. Child support laws were strengthened, and work was required from most of the able-bodied.
1996	Personal Responsibility and Work Opportunity Reconciliation Act. The Act removed the federal control of public assistance that had been enabled by the Social Security Act of 1935 and strengthened by amendments in 1962. In particular, the individual states were no longer required to provide a poor person with a cash welfare benefit.
1997	Temporary Assistance for Needy Families program (TANF) replaced the AFDC program. TANF was by 1998 operating in about forty states. Each state is enforcing a four- or five-year lifetime limit on the receipt of cash benefits and requiring (however differently) some amount of waged employment from drug-free participants.

rate was almost twelve times that in the rest of the state; by the end of the century, that difference would shrink to a factor of less than three (though many would still regard the difference economically and morally significant). Since New York City spent fewer dollars per recipient, the city-to-state differential in per capita expenditures (which narrowed across the antebellum period before widening again in the late nineteenth century) can probably be attributed entirely to the city's higher pauperism rate (Hannon 1997b, Tables 1 and 4).

Outside New York City, pauperism rates and expenditures per capita were positively correlated with urbanization, though urbanization and population density are found to have had little or no independent effect after controlling for other variables (Hannon 1997a, Tables 2, A1, A2, A3, and A4).

Given the relationships between urbanization, dependency, and expenditures within the state, it should not be surprising to find in the nationwide data a relatively high level of dependency in New York State. The work of Stephen Ziliak on the number of paupers in the nation's almshouses shows that the New York figures are not out of line with the averages for the New England and Middle Atlantic states (Tables Bf34–155) (Ziliak 2002a). Yet as one might expect, the almshouse rate in New York greatly exceeded the national average in 1880 and 1890. Still, the almshouse rates should not be used synonymously with pauperism rates. Pauperism rates include *all* recipients of public assistance, indoor and outdoor. Moreover, each state and each county used indoor relief and outdoor relief with different criteria for eligibility and in the context of local economic conditions.

The history of public assistance, when viewed from a long-run perspective, is also a history of withdrawal – though never complete – from the explicitly punitive, correctional, and mental health institutions. Most Americans now would not consider the auctioning system of the 1800s or the whippings of the 1700s a “good” or “service”; the practices hardly deserve the word “assistance.” Likewise, most Americans in the Victorian period would have shuddered at the very idea of the 1970s “welfare right” (Gordon 1990; Ziliak 1996b).

The separation of spheres, and its division of labor, would come slowly, unevenly, and with sudden reversals. In his study of relief in New York in 1823, John Yates, the Secretary of the State of New York, could still include pauper auctions as part of New York's public assistance programs (Hannon 1984). State Departments of Public Welfare, formed as recently as the 1920s, were preceded for sixty years by “State Boards of Charities and Corrections” and by “State Boards of Charities, Corrections, and Lunacy” (National Conference of Charities and Corrections 1893, pp. 33–51). To take one more example, at the end of the nineteenth century the very idea of a poor person would be transformed and expanded by caseworkers who were studying the nascent field of psychology – this shift occurred at the same time that public assistance was being abolished in the largest cities and as the notion of “structural unemployment” was coming into vogue.

The Evolution of Relief in New York Was Probably Typical

The evolution of public assistance in nineteenth-century New York can probably be regarded as fairly typical of Northern states, although sometimes ahead of its time. New York State was a leading

participant in each major reform movement of the nineteenth century, and the state's poor law often served as a model for other states (Schneider 1938; Trattner 1974; Leiby 1978; Katz 1983). Prior to 1824, public relief in New York State was the responsibility of town governments, and the forms of relief varied from town to town. Under its 1824 poor law, as revised in 1827, New York State transferred primary responsibility to county governments (though towns in many counties continued to assume responsibility for temporary outdoor relief). The 1824 law required that each county establish a poorhouse; and although many counties were exempted from this provision, by 1840 almost every county operated a poorhouse. By mandate of state law, all public relief recipients, except those deemed to be in need of only temporary assistance not to exceed \$10 during the year, were to be supported in a county poorhouse. Public assistance evolved with a similar pattern of development in the states of the Old Northwest Territory, which looked to Pennsylvania for their first model (Kennedy 1934, Chapter 1).

The 1827 revision of New York's poor law required county superintendents of the poor to submit annual reports to the Secretary of State, who in turn was directed to present a report to the state legislature. Annual reporting began in most states forty to seventy years later with the establishment of a Board of State Charities. In New York, the first *Annual Report* appeared in 1830. Most counties reported only on poorhouse relief until 1839, when they were directed to include temporary outdoor relief in their reports. The data in Tables Bf156–187 are constructed from the county-level data contained in these reports. When compared with the almost negligible use of the poorhouse found by Secretary Yates in 1823, the data from the period from the 1820s through the 1840s document a dramatic rise of the poorhouse as a share of both total expenditures on public relief (Tables Bf156–187). Likewise, the dramatic rise of the poorhouse can be seen in the series constructed by Priscilla Clement for the city of Philadelphia, 1800–1854 (Tables Bf17–27).

Though much of the historical literature locates the impetus of enthusiasm in America's *cities*, in antebellum New York State both the support for and the usage of the poorhouse was, if anything, more prevalent in rural–agricultural areas (Hannon 1985, pp. 243–247, 1996; Cray 1988, pp. 100–135). In 1840, for example, New York City sent 29 percent of its paupers to the poorhouse, whereas 44 percent of paupers in the rest of the state were supported in poorhouses (calculated from Table Bf176–187). Quantitative evidence from other states is required to determine the representativeness of New York City's policy. To take what must be an extreme illustration, in 1840 about 93 percent of Philadelphia's paupers were supported in the almshouse (Table Bf23–27).

The work of Stephen Ziliak on paupers in almshouses during the period 1850–1923 shows vast differences in almshouse usage by state, by census region, and over time (Tables Bf34–155) (Ziliak 2002a). For example, the length of time a pauper stayed in an almshouse varied immensely. In 1880, the average length of stay in a Delaware almshouse was eight years and in a Texas almshouse, one year. Length of stay was no doubt related to age (among other factors), and the age structure of the population in the East was much older than that of the West. But poorhouse usage varied over time and space in nearly every social and economic variable. Nationwide the able-bodied paupers were never more than one third the total almshouse population. In the nineteenth century, the able-bodied share of the almshouse population fell at each census enumeration and hit a low of about 7 percent in the 1920s. To

take one more example of difference, in 1923 the ratio of men to women in the population of the United States was near unity. In the almshouses of the Deep South, the ratio of men to women was also near unity. But in the almshouses of the Middle West and especially of the Pacific and Mountain regions the ratio of men to women was as high as 5:1 (Ziliak 2002a, Figures 3 and 8 and Table 1).

Oliver Twist Was Not the Typical Pauper of an Almshouse

The almshouses erected during the antebellum period remained central to the administrative structure of relief systems, and in New York they absorbed well over half of the funds of local public relief for the remainder of the century (Table Bf156–175). Across the Northern states, the almshouse bulked large in administrative and financial budgets. Yet nationwide, the percentage of the population living in almshouses was not particularly large (Tables Bf34–155). This was especially true in the second half of the nineteenth century and in the early twentieth century. Between 1850 and the 1920s, the fraction of the population living in almshouses peaked at 2.7 persons per 1,000. From its peak (in 1860), the fraction of the population living in almshouses fell at each census enumeration to a low of 0.08 percent in 1923 (Ziliak 2002a, Figures 5 and 6). During the same period, local officials provided outdoor relief to an increasing share of all public relief recipients (Table Bf176–187). This trend was caused by the relatively high cost of almshouse relief (calculated from Tables Bf156–187) and by a dawning recognition of the many environmental, as opposed to personal, causes of poverty (Hannon 1985). But this was also a trend toward the provision of increasingly specialized services to increasingly diverse populations. The miscellaneous poorhouse of colonial America was seen to be inhumane by the standards of the late nineteenth century. From New York to California, the almshouse evolved into an “old folks home,” a home for aged, unskilled, “feeble-minded,” and physically disabled men and women; there were more natives than immigrants and more whites than blacks, and most almshouse dwellers had never been married and had no children alive or able and willing to care for them. Oliver Twist, the waif of Dickens’ fiction commonly associated with the bowels of the poorhouse and the even darker workhouse, was in fact hardly seen in such places. By 1915, just 0.1 percent of all paupers in almshouses were, like Oliver, children with neither parent living. A better literary characterization of a pauper in an almshouse is Mrs. Thomson of Edward Eggleston’s *The Hoosier School-Master* (1871) or Grampa Joad of John Steinbeck’s *The Grapes of Wrath* (1939). Outdoor relief, though expanding at a tremendous rate, was going instead into the homes of able-bodied adults who experienced short spells of illness or industrial unemployment (Ziliak 1997). Yet total *institutional* usage was all the while expanding. This was as true of public institutions as it was of private institutions. As almshouse usage fell with each census enumeration, the usage of insane asylums, orphans’ homes, homes for the “friendless,” homes for “fallen women,” homes for the “blind, deaf, and dumb,” and homes for the feeble-minded increased more than proportionately (Ziliak 2002a, Table 2). An array of charities, many of them hybrids of public and private schemes, emerged to meet the special needs of new immigrant and urban poverty. Between 1880 and 1895, Indianapolis gave birth to more than thirty new charities. Among them one finds the Alpha Home for Aged Colored Women, the German Lutheran

Orphan’s Home, the Ladies’ Hebrew Benevolent Society, and the Socialistic Sick Benefit Society (Ziliak 1996a). Indianapolis was not unique.

“Welfare” Was Widely Abolished in the Late Nineteenth Century

The midcentury expansion of outdoor relief was rather abruptly halted when the downturns of the 1870s and the 1880s swelled pauper applications (Table Bf176–187). In response to crippled municipal budgets and a rising fear of pauperism and other vice, the Charity Organization Societies (COSs) launched a crusade against public outdoor relief (Ziliak 1996a, 1997; Hannon 1997b; Kauffman and Kiesling 1997).

Ten of the nation’s largest cities abolished public outdoor relief, and many others sharply reduced it. The numbers affected were not small. In Brooklyn more than 46,000 people were directly affected by the abolition of 1879. Leaders of the COS orchestrated the abolition.⁵ The COS did not object to the provision of material relief. Rather, they were advocates of a voluntaristic and “scientific charity.” Although their practices and achievements varied, the COSs sharpened the old distinction between “worthy” and “unworthy” poor; they revived a notion of friendship and morality in the delivery of public assistance; they brought “scientific method” to the study of poverty; they centralized service delivery and data exchange; they established state boards and national conferences of charity; they started industrial schools and commercial clubs; and they gave birth to modern social and case work. According to Stephen Ziliak, the abolition of public outdoor relief had at least two large effects: It induced a large increase in private charitable donations as well as in expenditures on workhouses and other correctional facilities. And yet instead of helping the poor to achieve self-reliance, abolition seems to have merely shifted the dependence from public to private rolls, and from benevolent societies to departments of corrections. For example, the length of time that a family stayed on relief rolls did not change with the abolition of welfare. In fact, the length of time a family stays on relief has not changed much at all since the 1820s, hovering in most decades between eight and thirteen months (Ziliak 1996a, 2002b, Table 3). The percentage of families leaving relief rolls for higher earnings is also relatively stable: between 33 and 40 percent. Similarly, the research of Stephen Ziliak and of Stanley Lebergott lends some support to the idea that middle-class charity – in spite of occasional and localized spasms – is rather constant: The ratio of the nation’s expenditures on indoor and outdoor relief to the average earnings of common labor has remained relatively steady over a long sweep of nineteenth- and twentieth-century history, between 25 and 30 percent nationwide (Table Bf28–33) (Lebergott 1976, pp. 61–65; Ziliak 2002b). As yet there is little evidence suggesting that the abolition of welfare was productive of increases in the self-reliance of the poor. To take just one more example, not a single laborer advanced to a higher occupational category while under the care of the Indianapolis Charity Organization Society.

Despite the crusades against public outdoor relief – or perhaps because of it – total institutional usage was rising and diversifying in the latter part of the nineteenth century. This rise correlated

⁵ The COS was imported from London to Buffalo, New York, in 1877. By 1893, there was a COS in 100 of the United States.

with increasing degrees of administrative control at the state level. Pauper children were removed from county almshouses and placed in private households or in state institutions that would try to address specific physical or mental disadvantages. Yet estimates of the numbers involved suggest that the local systems continued to support almost three quarters of the relief population in New York and Indiana at the end of the century, and so far there is little reason for thinking that other states deviated markedly from this pattern (Butler 1916; Hannon 1997a, Figure 2; Ziliak 2002a). Under stress from the depression of 1893–1894, public outdoor relief returned. But the more dramatic appearance of the welfare state, of course, waited for the twentieth century.

Alternatives to local relief in the late nineteenth and early twentieth century included federal pensions for veterans of the Civil War and, in many states, mothers' pensions (on which Aid to Dependent Children [ADC] was later modeled). By 1910, according to Theda Skocpol, 28 percent of all American men aged 65 and over, and some 300,000 widows, orphans, and other dependents were receiving benefits under the veterans' benefits programs. That is, the number of widows and dependents receiving veterans' pensions was more than four times the total number of paupers living in almshouses. By 1920, forty states had enacted mothers' pensions, under which local governments provided regular payments to impoverished mothers of dependent children (Skocpol 1992, pp. 160–204, 424–79). Still, the enumeration of paupers in almshouses in each decennial census from 1850 to 1880 and the special censuses of paupers in almshouses conducted by the Bureau of the Census in 1904, 1910, and 1923 attest to the continuing symbolic importance of the county poorhouse in the twentieth century (Tables Bf34–155) (Ziliak 2002a).

Public Assistance Has Been Entwined with Health and Corrections

The historical process of separating matters of public assistance from matters of crime and mental illness is a process that parallels the great twentieth-century expansions of criteria for eligibility for relief and of the sovereignty of the poor as consumer. Throughout the nineteenth century, there were moments when especially those who worked most closely with the poor acknowledged economic and social causes of poverty, but the belief that the roots of poverty lie in the character of the poor themselves and the idea that the provision of public relief itself creates dependency were dominant forces shaping public relief policy (Katz 1983; Hannon 1997a; Ziliak 1997). The twentieth century certainly did not eliminate these ideas from popular opinion, academic scholarship, or public policy debate. They continue to provide ideological support for reversals of a long-run evolution of programs for public assistance that, at least for native whites, lay less and less blame for poverty on the character of the poor person. The separation of public assistance from crime and “lunacy” has been a slow process of conceding ground to causes of poverty that lay outside the domain of personal responsibility. Perhaps most important, these causes have included recognition of the uncertain and sometimes volatile breakdown of markets and of marriage, as well as recognition of the facts of institutional racism, patriarchy, and mental and physical difference.

At the same time that public assistance was being divorced from corrections and mental healthcare, and as the power of local self-government and local control were being diminished, the

sovereignty of the poor was expanding: The movements were from auctions to workhouses to free government cheese; from the spectacle of bread lines to cashable checks in the mail, confidential and unrestricted, like cash. The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 made way for a substantial reversal of these developments.

The history of public assistance can, of course, be seen as a history of race, of class, and of gender struggles to define work, home, and the American Dream. From early nineteenth-century lists of the “causes of pauperism,” on which immigration occupied the number one spot, through the Americanization efforts of early social workers to restrictions on the eligibility of immigrants under the 1996 Personal Responsibility and Work Opportunity Reconciliation Act, the immigrant poor are often subjected to a nineteenth-century distinction between “worthy” and “unworthy.” Similarly, from gender and racial segregation of nineteenth-century poorhouse residents through the fight for mothers' pensions and ADC, to provisions of the Personal Responsibility and Work Opportunity Reconciliation Act that allow states to deny benefits to unmarried teen mothers and to impose family caps, the historical evolution of welfare policy is integrally linked with the politics of race, gender, and the American family (Skocpol 1992; Gordon 1994; Mink 1995; Quadagno 1996; Green 1999). To take just one example, in the first half of the nineteenth century, a free “Negro or mulatto” could enter the state of Ohio only “by giving to the clerk of the common pleas court a freehold security to the amount of five hundred dollars, which was later used for his support in case he became a pauper” (Kennedy 1934, pp. 23–36; Ziliak 2003).

Previous editions of the *Historical Statistics of the United States* have published statistics on public assistance. Most of the previously published data series begin their run in 1936. A few of the previously published data series were traced back to 1890.⁶ Statistical data for the centuries before the 1930s were omitted from the previous editions of *Historical Statistics of the United States*. The omission was not caused by an absence of publicly financed relief programs in earlier times nor by a dearth of primary source data: they are plentiful. At the time of the publication of the previous editions, there was simply a lack of historical research into the identification, collection, and analysis of such data.

A statistical portrait of public assistance in the United States from colonial times to the 1920s is beginning to emerge. The tables published here are but a small sample of the data on public assistance that historians now know exist. There is a long way to go before we have a quantitative account of public assistance whose completeness is akin to that of our national income statistics. For example, while historians are aware that public assistance is entwined financially and administratively with the history of private charities, historians are just beginning to uncover the economic significance of the relation between the two sectors (Ziliak 1996a, 1997; Hannon 1997b; Kauffman and Kiesling 1997; Kiesling and Margo 1997). Thus the data assembled here are more voluminous for particular geographic regions, periods of time, and kinds of relief, reflecting both the varied development of public and private schemes over time and place and the relative infancy of quantitative historical scholarship on public assistance in the United States.

⁶ For example, in *Historical Statistics of the United States* (1975), series H 346–367 traces public assistance at the local, state, and federal levels to 1936; and series H1–31 (“Social Welfare Expenditures under Public Programs”) extend back to 1890.

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SOCIAL WELFARE: 1929 TO THE PRESENT

Price V. Fishback and Melissa A. Thomasson

Probably the most dramatic change in the American economy over the course of the twentieth century has been the growth of social welfare spending by both public and private entities. A key component of that growth has been an expansion in *public* social welfare programs. These programs aid individuals and families in obtaining education and in obtaining insurance against financial hardship in old age and against the risks of workplace disability and unemployment. They also provide financial and other resources for low-income households. The programs sometimes supplement and sometimes replace the provisions of such services by private enterprise or by households. In fact, private spending on these social welfare issues may have been greater than public spending at the turn of the century and is roughly two thirds of the level of public social welfare spending today.

The Social Security Administration (SSA) is the primary source for public social welfare statistics. The SSA defines social welfare spending to include "expenditures on social insurance, income maintenance, health and medical care, education, housing, veterans' benefits, and other welfare services directed specifically toward promoting the economic and social welfare of individuals and families." There is certainly the potential for endless debate over the adequacy of this definition. The SSA chose the definition in part to be compatible with international definitions of social welfare spending used by the Organization for Economic Co-operation and Development (OECD) and the International Labour Office (ILO). Awareness of the potential limitations of the definition and its implied categories has led the SSA to provide the statistics at a low enough level of disaggregation that those with alternative definitions can regroup the data appropriately.

Prior to the 1930s, social welfare spending was primarily the responsibility of state and local governments. As seen in this chapter's essay on public assistance from colonial times to the 1920s and tables contributed by Joan Hannon and Stephen Ziliak on public assistance in the nineteenth century, some local governments provided relief to the poor, but the amounts varied substantially from place to place. Public schools were supported by local taxes, and beginning in the mid-nineteenth century they were maintained by a combination of state and local taxes. In the mid-1850s, states began to establish institutions for the mentally ill and other dependent groups, and state boards of health were in operation in many states by the early 1900s. The federal government largely confined its social welfare responsibilities to aiding veterans of military service, although the pensions for Civil War veterans and their widows and children benefited a substantial segment of society

(see Skocpol 1992; Orloff 1993). During the Progressive era in the early 1900s, reformers pressed state governments for an extensive series of social welfare programs, including workers' compensation laws, unemployment insurance, state-provided health insurance, old-age pensions, and mothers' aid pensions for widowed mothers. Of all these programs, only workers' compensation and the mothers' aid pensions were adopted in a large number of states by 1929. By the mid-1930s a number of states had adopted old-age relief plans, while only Wisconsin had enacted unemployment insurance, and they had not yet started paying benefits by the time the Social Security Act established unemployment insurance as a joint federal-state program.

Prior to the Great Depression, social insurance and many social welfare activities were not considered to be under the purview of the federal government. When the Great Depression led to an unemployment rate of nearly 25 percent in 1933, Franklin Roosevelt and the New Dealers made the argument that the Depression was a national emergency that must be dealt with using federal programs. The New Deal provided emergency assistance to large numbers of unemployed workers and then in 1935 established several long-term social insurance programs with the Social Security Act. Federal actions during the 1930s set precedents for the expansion of the federal government into additional programs that were introduced in later years. After the federal government became involved in the social welfare business, the collection of statistics aggregated to a national level expanded rapidly. Consequently, most of the statistics presented in this chapter are from 1929 to the present. Few national statistics are available for the earlier periods. There was enormous variation across cities, counties, and states in the provision of such services, and we have only shreds of evidence available.

It is important to offer a caveat about use of the statistics on social welfare expenditures. The vast majority of the statistics available on social welfare spending are reported by the SSA in the *Social Security Bulletin* and the *Social Security Bulletin Annual Supplement*. The first lesson to be learned in examining the long time series is that the series are often revised in response to new data, methods, and conceptual definitions. The SSA often publishes the revised versions of the recent data, but in many cases it offers revised information for only those earlier years ending in 0 and 5. In most cases, we try to present the revisions that were available through 1997. Discussions with the people at the SSA who compile the statistics suggest that a search for "the" number in any single year would be futile. The numbers are estimates from surveys, reports of other agencies, and other sources. In a number of settings, the fundamental information is collected only every second, third, fifth, or tenth year, and the observations for the intervening years are interpolations. Thus, the reported observations for each year should be treated as rough approximations of the "true" level. The people at the SSA are careful to try to maintain consistency in the definitions of the series. However, even the revisions are subject to measurement error, and year-to-year fluctuations between a revised statistic for a year ending in 0 or 5 with neighboring years are likely to be subject to measurement error. There is some comfort in our finding that many of the revisions are within 3 percent of the prior reported estimates. This caveat suggests that the data are useful for showing long-term trends over decades but are more sensitive to measurement error in examining year-to-year changes.

A preliminary word on the organization of tables is also in order. Tables Bf188–270 report annual information on social welfare

spending under public programs based on the OECD definitions for the period 1929 to the mid-1990s. The tables offer a breakdown of social welfare spending for programs under each of the broad categories of social insurance, public aid, health and medical programs, veterans' programs, education, public housing, and other programs. Many of the programs are funded by several layers of government; therefore, Table Bf196–211 shows the extent to which federal and state or local governments provide the funding for each of the broad categories. Governments are not the only source of social welfare spending. Tables Bf773–892 offer information on social welfare spending by private entities, which account for as much as 13 percent of gross domestic product (GDP) in today's economy. Tables Bf271–772 offer information about specific public programs: the numbers of people affected, the monies spent, and the sources of funding. There are a large number of tables in this area because the development of social welfare programs over the course of the twentieth century has been complicated. The federal, state, and local governments have developed an array of programs to meet different aspects of social welfare. Views have changed about the optimal way to meet these goals. As a result, long-term programs have been redesigned, and even if they have kept the same name, the nature of data collection for the new goals changes the series collected. In other cases, new agencies are developed to take over the duties of the original program. Finally, new programs are added to the list. This has led us in some cases to report multiple overlapping series on the same issues.

Aggregate Trends

The dramatic increase in public social welfare spending in the United States has been one of the major economic trends in the twentieth century. The broadest conceptual measure of public social welfare spending is in series Bf188, which is the series collected by the SSA to be compatible with the OECD/ILO definitions of public social welfare spending. Between 1929 and 1993, social welfare spending in public programs in 1992 dollars (adjusted for inflation by the GDP deflator) has grown at an average annual rate of 6.1 percent per year, nearly double the annual average growth rate of 3.3 percent for real GDP.¹ To give a sense of the size of public social welfare spending, it is useful to compare it to the overall size of the economy by describing the spending as a comparative percentage to GDP. There is one important caveat about this comparison. When social welfare expenditures are compared to GDP in percentage terms, it should not be presumed that this is the contribution of social welfare expenditures to GDP. The GDP is defined as the market value of the output of final goods and services in the economy, while a significant percentage of the social welfare expenditures are transfer payments that would not be considered as additions to the final goods and services measured by the GDP.

¹ The annual average growth rate for social welfare spending between 1929 and 1993 is calculated as $[(S_{1993}/S_{1929})^{1/(1993-1929)} - 1] \times 100$, where S_{year} refers to the value for the variable in that year. All other average annual growth rates in the chapter are calculated in the same way using the endpoints of the period examined. The information on nominal GDP, GDP in 1992 dollars, and the GDP deflator used to convert nominal dollars to 1992 dollars is derived from the nominal and real GDP series rounded to billions of dollars that formed the basis for the tables in the Council of Economic Advisors, Economic Report of the President Transmitted to Congress February 1998, pp. 280–2. In Chapter Ca, there is an updated set of GDP numbers.

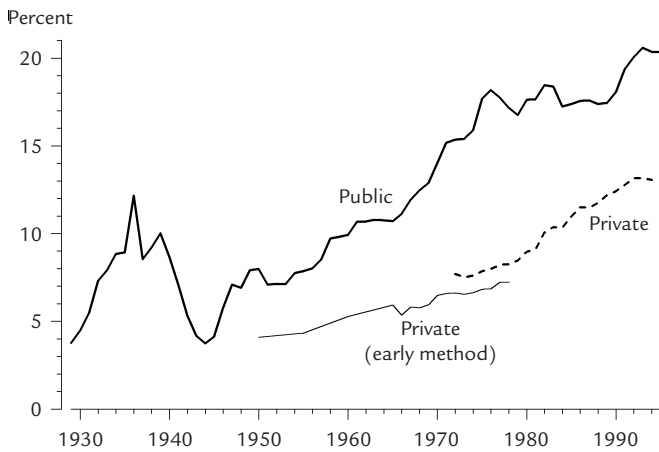


FIGURE Bf-B Public and private social welfare expenditures as a percentage of gross domestic product: 1929–1995

Source

Series Bf188, Bf773, and Bf781 expressed as a percentage of series Ca1.

Figure Bf-B shows that social welfare spending from public sources rose from roughly 3.8 percent as large as GDP in 1929 to 20.6 percent by 1993. The estimate for 1929 should be considered a very rough estimate because of our lack of accumulated statistics for state and local governments. However, it is likely that the true value is close to this figure. Estimates for 1890 and 1913 prepared for *Historical Statistics of the United States* (1975) suggest that public social welfare spending was approximately 2.4 percent as large as GDP in 1890 and 2.5 percent as large as GDP in 1913.² Impressionistic comparisons seem consistent with these estimates. As seen in Chapter Bc, children have spent increasingly longer periods of time in school over their lifetimes. Spending on veterans' programs peaked between 1890 and 1913, as the number of Civil War veterans began to dwindle. Old-age pension programs were typically provided for federal workers in 1920 before they were available to most state and local governments. Finally, public assistance spending by state and local governments was clearly meager relative to the levels we see during and after the 1930s. Social welfare spending spiked above 10 percent as large as GDP during the mid-1930s owing to a combination of low output during the heart of the Great Depression and the large-scale public assistance spending by the Works Progress Administration (WPA) and other New Deal agencies. By the end of World War II, social welfare spending had returned to pre-Depression percentages relative to GDP. We then see its substantial rise over the course of the next fifty years.

The rise in public social welfare spending during the twentieth century was accompanied by a substantial increase in the share of social welfare spending from federal funds (calculated from Table Bf196–211). It is not always obvious how to determine precisely whether the federal government or the state and local governments are the source of the funds. Many programs involved combined activity by the state and local governments and the federal government, and, in a number of cases, the federal government provides grants of funds to be administered by state and local

governments in ways that might vary from state to state. The text for Table Bf196–211 describes several situations where the SSA statistics and the national income product accounts (NIPA) have treated the source of the same grants differently. The description that follows is based on the decisions made by the SSA.

Estimates from *Historical Statistics of the United States* (1975) place the federal government's share of social welfare spending in 1890 at 36 percent, primarily as a result of the Civil War Pension program. As the number of Civil War veterans declined, the federal share fell to 20 percent by 1913 (see pp. 332, 341). In 1929, the first year of the SSA's long-term time series, the federal government continued to fund about 20 percent of public social welfare expenditures. The federal share spiked above 60 percent during the New Deal and was at 56 percent during the military mobilization and demobilization of World War II. A long-term secular rise followed through the end of the Carter administration. Since the early 1980s, the share has fallen slowly to below 60 percent, as the federal government has sought to shift more of the responsibility to state and local governments.

The data in Table Bf196–211 show that the federal share of social welfare spending varies greatly across categories. The federal government has always provided nearly all of the funding for veterans' programs and the lion's share of funding for public housing projects and subsidies. In contrast, the federal share of public educational spending has traditionally been below 10 percent because the focus of public educational spending is on elementary and secondary schools, which are primarily the responsibility of state and local governments. After the New Deal fueled a dramatic increase in federal activity, public aid has become largely a shared responsibility between the federal government and the state and local governments. Since 1929, the federal share of public social insurance expenditures has risen markedly from 20 percent in 1929 to over 80 percent in the early 1990s. The rise is largely the result of the rapid expansions in the federal old-age and Medicare programs, which account for roughly 47 and 22 percent of social insurance expenditures, respectively (see series Bf189 and Bf214–215). State and local governments still provide workers' compensation for nonfederal government workers, administer roughly 80 percent of the funds for unemployment insurance, and operate public employee retirement systems that account for 40 percent of the total of federal, state, and local systems.

Social Insurance Programs

The leading contributor to the long-term rise in public social welfare expenditures has been social insurance programs (see series Bf189 and table Bf212–224). As seen in Figure Bf-C, social insurance expenditures have risen from less than 1 percent as large as GDP in 1929 to 10 percent as large as GDP by 1993. The social insurance programs, as defined by the SSA, include the federal Social Security programs for Old-Age, Survivors Insurance (OASI) and Disability Insurance (DI); the Medicare programs for Hospital Insurance (HI) and Supplementary Medical Insurance (SMI); the state programs for workers' compensation insurance; the federal Black Lung Benefits program; temporary disability programs in a handful of states; the federal–state programs for Unemployment Insurance (UI); and retirement and disability programs for federal employees (including the military), state and local employees, and railroad workers. All these programs operate at least to some extent

² The estimates are based on Musgrave and Culbertson (1953) and J. Frederic Dewhurst and Associates (1955) and reports of official agencies. See U.S. Bureau of the Census (1975), pp. 330, 340–1.

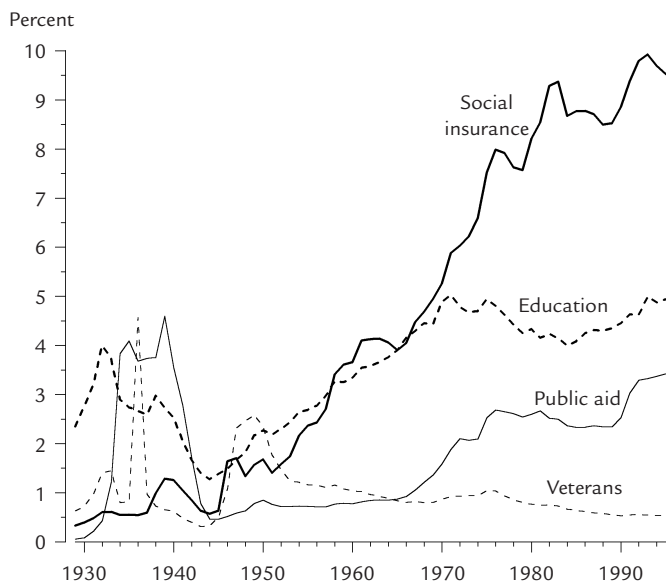


FIGURE Bf-C Public social welfare expenditures as a percentage of gross domestic product, by type of program: 1929–1995

Source

Series Bf189–190 and Bf192–193 expressed as a percentage of series Ca1.

Documentation

Not shown from Table Bf188–195 are the following lesser categories: health and medical programs (series Bf191), housing (series Bf194), and other social welfare programs (series Bf195). Together they accounted for 0.4 percent of gross domestic product in 1929 and 1.9 percent in 1995.

like insurance. Individuals and/or their employers pay premiums or taxes into a fund. In turn, when the individual reaches old age, is disabled, is unemployed, or is injured on the job, depending on the program, the individual receives payments. In actual operation, it is not always easy to draw the line between the programs defined as social insurance in the SSA statistics and those defined as public assistance. For example, the aged persons receiving Social Security OASI payments in the early 1940s had contributed little, if anything, into the program before they began receiving benefits. Further, many of the early cohorts receiving Social Security received more in benefits than they would have received if they had contributed the amounts to an actuarially sound private pension fund.

Among the industrial nations, the United States was a late-comer in the widespread public provision of social insurance. Germany under Bismarck led the way in the 1880s with sickness, accident, old-age, and disability insurance programs. A number of European countries followed suit. Except for federal provisions for the military, government provision of widespread social insurance did not begin until the majority of states adopted workers' compensation laws in the 1910s and the federal government established unemployment insurance and old-age insurance under the Social Security Act of 1935. Only a handful of states have established temporary disability insurance programs.³

³ The states establishing temporary disability programs are California, Hawai'i, New Jersey, New York, and Rhode Island, as well as the territory of Puerto Rico. There are also government-run railroad temporary disability programs. See Social Security Administration, *SSBASS* (1997), Table 9.C.1.

Old-Age and Disability Insurance

The earliest forms of social insurance by the federal government were limited to disability pension programs for the military (Clark, Craig, and Wilson, 1999, 2003). Before 1855, the military pension systems were primarily disability plans, with the notable exception of officer's pensions from the Revolutionary War. The Continental Congress created the first military pension plan for naval personnel in November 1775 and an army plan a year later. Subsequent revisions to the army plan offered life annuities to officers who remained in the line for the duration of the war. In addition, several colonies offered plans for their militia and naval personnel. All these plans were compromised by the woeful financial state of Revolutionary public finance. Eventually, the Revolutionary pensions were reorganized and ultimately assumed by the federal government after ratification of the Constitution. At that time, the army plan was placed on a "pay-as-you-go" basis, but until its bankruptcy in 1842, the navy plan was funded with monies from the liquidation of prizes. Veterans of subsequent military conflicts, most conspicuously the War of 1812 and the Mexican War, were offered similar plans. Although confusion surrounding antebellum pension records makes an exact accounting problematic, by 1861 roughly 10,500 veterans, widows, or dependents were receiving \$1,036,064 in pensions benefits, most of which was for disabilities. In 1855, Congress created the first systematic retirement plan for naval officers. In 1861, that plan was revised, and army officers were included. The Act of 1861, and its subsequent amendments, allowed officers to retire at 75 percent of their active-duty pay after forty years of service. The Civil War, which began in the same year, added substantially to the pension rolls and the pressure on the Treasury to finance those liabilities (Clark, Craig, and Wilson, 1999, 2003). The benefits expanded more widely after the Civil War because of the substantial percentage of the Northern population that participated in the Civil War and later became eligible for Civil War veterans' disability pensions. Definitions of eligibility were broadened enough over time that the Civil War disability program has been considered a precursor of old-age programs for the general public.⁴

Prior to 1920, nonmilitary civil servants received pensions on a case-by-case basis at the discretion of the Congress. The federal government established retirement programs for all federal employees under the 1920 Civil Service Retirement Act (Graebner 1980; Johnson and Libecap 1994; Craig 1995). Since 1987, the

⁴ See Skocpol (1992) and Orloff (1993), pp. 134–7. The original law for Civil War pensions in 1862 extended only to soldiers actually injured in combat or to dependents of those killed or disabled. As a result, expenditures on Civil War pensions began declining in the 1870s. The 1879 Arrears Act allowed soldiers who "discovered" Civil War-related disabilities to sign up and receive in one lump sum all the payments they would have been eligible for since the 1860s. In 1890, the Dependent Pension Act severed the tie to combat-related injuries; any veteran serving ninety days in the military was eligible if at some point he became disabled for manual labor. In practice, old age alone became a sufficient disability. A 1906 law declared that the age of 62 and over was a permanent specific disability within the meaning of the pension laws. At the turn of the century, about 15 percent of the elderly in America were receiving Civil War pensions because veterans accounted for about 30 percent of American men over age 65. In the North and Midwest, the proportion receiving pensions was about 40 to 48 percent. Confederate veterans were left out of the system, although some states provided pensions. Georgia was the most generous, with a pension that was less than one seventh as generous as the Northern pension of \$360 per year.

federal employee retirement programs have been in transition. Almost all new federal employees hired after 1983 are now under the Federal Employees Retirement System (FERS), which combines Social Security benefits, a basic benefit plan, and opportunities for employees to save in tax-deferred annuities similar to 401(k) plans. Employees hired prior to 1983 are still under the Civil Service Retirement System but have the option to transfer to the FERS.⁵

As of 1929, retirement programs for public employees, including the military (series Bf217), accounted for roughly one third of social insurance expenditures, while state workers' compensation programs (series Bf223) accounted for roughly two thirds. Expenditures for public employee retirement programs have continued to expand at an average annual rate nearly 2.4 times as fast as real GDP, as public employment has expanded and benefit levels have increased (see Tables Bf290–348 and Bf735–745). Even so, the expansion of other social insurance programs has been even more rapid, such that the public employees' share of public social insurance expenditures has declined to 22 percent in the 1990s.

Prior to the 1930, there were virtually no old-age insurance programs for the general public that resemble the current Social Security old-age pension plan. Between 1915 and 1935, twenty-eight states and two territories passed "old-age pension" plans. These programs appear to be largely relief programs for the aged with low incomes that would allow them to live outside institutions (Stevens 1970, pp. 20–4; Quadagno 1988, pp. 51–75; Costa 1998 pp. 166–7). In compliance with the SSA's categories, we discuss them in more detail in the section on public assistance programs. As the Depression deepened, the federal government became involved in providing public assistance, and there was substantial grassroots public pressure for some type of federal old-age pension plan.⁶ The Social Security Act of 1935 established the OASI (the bulk of series Bf214) and UI (the bulk of series Bf218) programs. In 1957 the program was expanded to include DI, and in 1966 the Medicare HI and SMI programs were established for the elderly (series Bf215).

The railroads led the way in establishing private retirement pension programs beginning in 1874. In the 1930s, the federal government established railroad social insurance systems that were separate from the Social Security systems. The railroad system for retirement was established in 1934, 1935, and 1937 (series Bf216 and Table Bf746–761); for unemployment in 1938 (series Bf219 and Table Bf497–510); and for temporary disability benefits in 1946 (series Bf220).⁷ Because railroad employment has declined over the past thirty years, expenditures on temporary disability and unemployment insurance in the railroad systems peaked in the early 1960s, while expenditures in the railroad retirement system peaked in the early 1980s.

Even though the first old-age pension checks were not issued until 1940, the Social Security and Railroad Retirement Acts immediately gave retirement coverage to a large segment of the population.

Employees with wages and salaries equivalent to roughly 85 percent of total wages and salaries were covered by OASI retirement programs by 1937 (see series Bf272 and Bf274). After dropping during World War II to a low of 72 percent, the figure rose to its long-run level of over 95 percent in the mid-1950s. The self-employed were not covered by the Old-Age, Survivors, Disability, and Health Insurance (OASDHI) system until the 1950 amendments to the Social Security Act. The earnings of the self-employed covered by the OASDHI system (series Bf279) expanded very rapidly during the 1950s, as additional amendments to the Social Security Act expanded the types of self-employment covered under the Act.

Since the introduction of Social Security, there has been a significant rise in life expectancy, a significant population growth during the baby boom, and an increase in labor force participation by women. All these factors have contributed to a substantial increase in the number of workers with earnings that are taxable for contributions to the OASDHI trust funds (series Bf381). Although the number of workers with taxable earnings has increased rapidly over the past six decades, the benefits paid out to Social Security recipients have risen at an even faster pace. After the Social Security Act was amended in 1939 to allow the OASI to become a pay-as-you-go system funded by contributions of taxes by current workers, the size of the tax burden on current workers has risen dramatically over time. Average earnings per worker in covered employment have risen at an average annual rate of roughly 1.6 percent per year from \$9,382 in 1937 to \$22,618 in 1997 (1992 dollars in both cases). Yet, the rise in benefits paid has been even faster. OASI benefits in 1992 dollars per worker with taxable earnings started at a low of around \$10 when the old-age benefits were first paid out in 1940 and have risen to just under \$2,000 per worker with taxable earnings in the 1990s.

The rise in the tax burden has been driven by expansions in coverage, increases in average benefits, a rise in the percentage of the population reaching retirement age, and an increase in the longevity of the retirees. Since 1940, the number of families receiving old-age benefits per wage earner reporting taxable incomes in Table Bf-D has increased from below 1 per 100 to nearly 19 per 100 in the early 1990s. The OASI program provides benefits not only to the retired and their dependents but also to the survivors of deceased workers. Following World War II, generally 70 to 80 percent of the benefits in the OASI program have been paid to the retired workers and their dependents with the remainder going to the survivors of deceased workers (see series Bf396–397 and Bf401). As a result, the number of families receiving survivor benefits has risen to about 4 families per 100 wage earners reporting taxable income.

The SSA began paying benefits to disabled workers in 1959 under the DI program, and the number of beneficiary families of disabled workers has risen to a similar level of about 4 families for every 100 wage earners (series Bf416–421).⁸ It is anticipated that as the baby boom generation reaches retirement age, the number of families receiving OASI and DI benefits will continue to rise relative to the number of wage earners, putting increasing pressure on the Social Security system.

The increase in the number of families receiving benefits has been driven partly by increases in the life span of the retirees as

⁵ See the text for Table Bf735–745 for more specific details on the operation of the Civil Service Retirement System and the FERS.

⁶ For discussions and other sources on the introduction of Social Security and later amendments to the law, see Graebner (1980), chapter 7; Weaver (1982); Ball (1988); Berkowitz and McQuaid (1992); Costa (1998), Chapter 8; and Schieber and Shoven (1999).

⁷ See also Tables Bf290–348 for information on beneficiaries and payments under the railroad systems. The 1934 version of the Railroad Retirement law was declared unconstitutional and replaced by a new act in 1935. For a description of the introduction of the Railroad Retirement law, see Graebner (1980), pp. 153–80.

⁸ For a discussion of the introduction of DI, see Berkowitz and McQuaid (1992), pp. 136–41, 186–8; and Weaver (1982), pp. 137–40.

TABLE Bf-D Long-term changes in key indicators for the Old-Age, Survivors Insurance program under Social Security: 1940–1996

Year	Ratios to the number of workers with taxable earnings			OASI benefits paid per worker with taxable earnings 1992 dollars	Average earnings of workers in covered employment 1992 dollars	Ratio of benefits to average monthly earnings of workers in covered employment				
	Workers fully insured Ratio	Retired-worker families receiving old-age benefits Ratio	Survivor families receiving benefits Ratio			Retired-worker family		Survivor family: widowed mother or father and one child Ratio	Disabled-worker family: worker, spouse, and one child Ratio	Maximum benefit payable to men at retirement Ratio
						Male worker only Ratio	Female worker only Ratio			
1940	0.68	0.003	0.001	9	9,382	0.27	0.22	0.40	—	0.49
1950	1.24	0.036	0.010	109	12,439	0.24	0.18	0.41	—	0.24
1960	1.16	0.108	0.027	633	15,712	0.26	0.20	0.43	0.61	0.39
1970	1.16	0.140	0.039	1,015	18,735	0.27	0.21	0.45	0.55	0.40
1980	1.24	0.169	0.041	1,541	19,492	0.38	0.30	0.63	0.74	0.58
1990	1.23	0.183	0.038	1,783	21,621	0.40	0.31	0.60	0.63	0.58
1996	1.22	0.184	0.035	1,913	22,618	0.40	0.31	0.59	0.60	0.60

(continued)

Year	Percentage of recipients age 80 and older		Percentage of recipients accepting reduced benefits		Tax rates for employer and employee each			Maximum taxable earnings Million 1992 dollars	OASI trust fund assets dollars
	Male	Female	Male	Female	OASI	DI	HI		
	Percent	Percent	Percent	Percent	Percent	Percent	Percent		
1940	1.8	0.6	—	—	1.00	—	—	27,901	18,889
1950	7.1	3.7	—	—	1.50	—	—	16,408	75,046
1960	12.1	7.2	—	33.4	2.75	0.25	—	20,627	87,336
1970	15.9	14.4	35.9	58.5	3.65	0.55	0.60	25,590	106,475
1980	15.6	18.3	54.8	69.1	4.52	0.56	1.05	42,931	37,831
1990	16.6	22.7	64.6	72.6	5.60	0.60	1.45	54,806	228,834
1996	18.5	25.9	68.0	74.4	5.26	0.94	1.45	56,890	453,165

Sources

GDP deflator used to convert nominal dollars to 1992 dollars: the deflator derived from the nominal and real GDP series rounded to billions of dollars that formed the basis for tables in the Council of Economic Advisors, Economic Report of the President Transmitted to Congress February 1998 (U.S. Government Printing Office, 1998), pp. 280–2.

Workers with taxable earnings: series Bf381.

Workers fully insured for retirement or survivor benefits: series Bf377.

Retired-worker families receiving old-age benefits: sum of series Bf408 and Bf411.

Survivor families receiving benefits: sum of series Bf412–415.

Benefits paid: series Bf395.

Average annual earnings of workers in covered employment: series Bf384 divided by series Bf381. Average monthly earnings of workers in covered employment: average annual earnings divided by 12.

Ratio of benefits to average earnings of workers in covered employment: series Bf462, Bf463, Bf466, Bf472, and Bf474, each expressed as a ratio to the average monthly earnings of workers in covered employment.

Percentage of beneficiaries age 80 and over: series Bf431 and Bf441.

Percentage of beneficiaries accepting reduced benefits: for men, series Bf425 and Bf435.

Tax rates for employer and employee each: series Bf389–391.

Maximum taxable earnings: series Bf386.

OASI trust fund assets: series Bf451.

well as increasing numbers of people accepting reduced benefits for early retirement. The average age of retired-workers beneficiaries has risen by 5 years for males and 6.4 years for females between 1940 and 1996 (series Bf426 and Bf436). Meanwhile the percentage of beneficiaries aged 80 and over in Table Bf-D has risen from below 2 percent in 1940 to over 18.5 percent for males and 25.9 percent for females in 1996. These averages and percentages understate the true rise in life expectancy because women and men became eligible to draw reduced benefits at age 62 in 1956 and 1961, respectively.⁹ The monthly benefits are reduced to allow

for the increased length of time that the retired worker accepts the benefits.¹⁰ Despite these administrative reductions in benefits, the

⁹ As of 1997, the reduction in OASI benefits for a person who accepted benefits between age 62 and the retirement age of 65 (rising to 67 next decade) was five ninths of 1 percent for each month of entitlement prior to age 65 up to a maximum of 20 percent.

¹⁰ The SSA reports average monthly benefits for those with full benefits and those with reductions for early acceptance. The ratio of average monthly benefits paid to beneficiaries with reduced benefits to average monthly benefits for those with full benefits has remained stable at around 75 percent for both men and women since 1985 (see Table Bf476–483). The ratio gives the impression that people lose more from early retirement than they actually do. Through 1979, the SSA came up with a calculation of what workers who had reductions for early retirement would have received without the reduction (see Table Bf476–483). The ratios of the average reduced benefits to the average benefits they would have received without reduction were roughly 90 percent over the period. Thus, the differences between average benefits for early retirees and regular retirees is caused by difference in the lifetime labor force participation, age at retirement, and possible income differences at the time of retirement of the two groups.

percentage of male beneficiaries accepting reduced benefits listed in Table Bf-D has risen from less than 5 percent to 68 percent in 1996, while the percentage for women has risen from 7.5 percent in 1956 to 74.4 percent in 1996.

Another contributor to the rise in spending on Old-Age, Survivors, and Disability Insurance pensions has been a long-term rise in average monthly benefits. Over the past fifty-five years, the average monthly benefits reported in Table Bf461–475 have risen faster than the average monthly earnings for wage and salary earners covered by Social Security (series Bf381 and Bf384). Figure Bf-E shows the ratio of average monthly family benefits to the monthly earnings of wage earners for several different retirement categories. During the 1940s, benefits rose very slowly in nominal terms, and beneficiaries lost ground relative to inflation and average monthly earnings. In the 1950 Social Security Amendments, Congress adjusted benefits upward to accommodate for much of the lost ground during the 1940s. Through periodic adjustments, Congress kept the ratio of benefits to earnings roughly stable through the 1960s. In 1972, Congress established cost of living adjustment (COLA) clauses that allowed benefits to rise with the rate of inflation. During the 1970s, the ratio of benefit levels to monthly earnings rose sharply by roughly 40 to 60 percent. The rapid growth in the 1970s caused Congress to establish new benefit computation rules in 1977

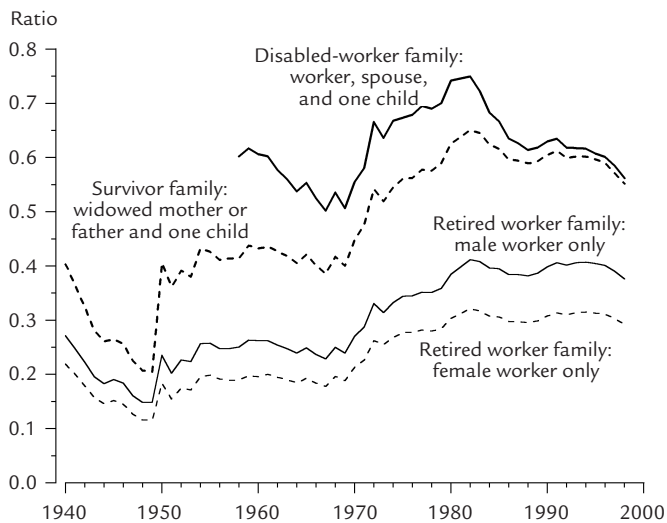


FIGURE Bf-E Old-Age, Survivors, and Disability Insurance – ratio of the family benefit to average earnings of workers in covered employment, by family type: 1940–1998

Source

Calculated from series Bf381, Bf384, Bf462–463, Bf466, and Bf472.

Documentation

This figure is based on average monthly benefits received by various types of families under the Old-Age, Survivors, and Disability Insurance (OASDI) program. Four family types are displayed: disabled-worker family (worker, spouse, and one child), series Bf472; survivor family (widowed mother or father and one child), series Bf466; retired-worker family (male worker only), series Bf462; and retired-worker family (female worker only), series Bf463. These monthly benefits are displayed here as a ratio of the average monthly earnings for wage and salary earners covered by OASDI, which is computed from series Bf381 and Bf384.

for workers who became newly eligible or died after 1978.¹¹ Since 1980 male retired workers have received average monthly benefits that are about 40 percent of the average monthly earnings in covered employment (series Bf462). Disabled-worker families have not fared as well (series Bf469–474). In figure Bf-E, the monthly benefits for a disabled worker with a wife and one child started at 60 percent of the average workers' monthly earning when the program was introduced in 1958. They then dropped to around 50 percent by 1969 and then started a sharp climb to 74 percent in the early 1980s. However, by the 1990s disabled-worker benefits had fallen back to around 60 percent. For comparisons of monthly benefits paid to different genders, see Tables Bf-D and Bf476–483.

Medicare

Studies in the early 1960s showed that the majority of elderly who had applied for means-tested public assistance to the elderly had been seeking help to pay their medical bills.¹² Congress responded by amending Title II of the Social Security Act in 1965 to establish Medicare, a health insurance program for the aged. The Medicare program consists of two separate but coordinated programs: Part A, Hospital Insurance; and Part B, Supplementary Medical Insurance. Expenditures on the Medicare program since 1966 account for a substantial part of the increase in social insurance expenditures. Starting at zero in 1965, Medicare expenditures accounted for 22.5 percent of all social insurance expenditures in 1993 and were 2.25 percent as large as GDP (see series Bf215).

The HI program is funded by the HI taxes collected from wage and salary earnings (see series Bf391 and Bf394) and therefore is available to all Social Security recipients without payment of any monthly insurance premiums. The HI program tries to use basic insurance methods to limit overuse of hospital services by requiring that the insured pay deductibles and copayments, which are described in Table Bf535–544. Persons who do not qualify for Social Security benefits but who obtain SMI may purchase HI for a monthly premium, which rose from \$33 in 1973 to \$311 in 1997 (series Bf539).

The Medicare program also offers voluntary SMI coverage for physicians' visits and other medical services (see the text for Table Bf545–557). After individuals reach the proper age or disability status, they can purchase insurance for a monthly premium, which is deducted from the individual's Social Security check (see series Bf542). The government supplements this premium from

¹¹ Generally, all the retirement and survivor series follow a similar path relative to monthly earnings (series Bf461–468 compared with average monthly earnings for wage and salary earners covered by Social Security, which is calculated as series Bf384 divided by series Bf381 and then divided by 12). The average monthly benefits are influenced by demographic factors and variations in the lifetime labor force activities of the retirees and the survivors. For detailed descriptions about the formulas used to calculate benefits, see Social Security Administration, *SSBASS* (1997), pp. 39–75. The maximum benefits for men in the year they retire give an indication of the potential earnings. The maximum started at about 50 percent of average monthly earnings, dropped during the 1940s, steadied at about 40 percent in the 1950s and 1960s, jumped above 60 percent in the early 1980s, dipped in the late 1980s, and has stayed around 60 percent in the 1990s (see series Bf475 compared with average monthly earnings for wage and salary workers covered by Social Security).

¹² For more discussion of the introduction of Medicare, see Weaver (1982), pp. 151–8.

general revenues (series Bf543–544). The insured pays a deductible of the first \$100 for medical care during the year and then a copayment of 20 percent of the cost of treatment (series Bf540–541). The SMI program aspect of Medicare is partially funded by premiums from purchasers of the insurance, with the remainder largely based on general tax revenues because there is no specific tax designated for this program. The premiums paid by participants (series Bf559) covered over 50 percent of the expenditures on medical coverage under the SMI plan (series Bf564) in the early 1970s. Since 1979, premiums have covered less than 30 percent of the costs of the medical coverage provided.

Because health care costs have risen sharply since 1966 – the consumer price index (CPI) for medical care has risen by an average annual rate of 7.3 percent per year – the Medicare program has raised premiums and deductibles at an even faster average annual rate of 10 percent per year for the HI inpatient hospital deductible (series Bf535) and 13 percent per year for the SMI monthly premium (series Bf542). The Medicare program has tried to control costs further by limiting the amounts that hospitals and physicians can receive in payment for treatments.

Funding the Old-Age, Survivors, Disability, and Hospital Insurance Programs

When the OASI system was originally established in 1935, the original intent of the Roosevelt administration appears to have been to establish a pension fund with accumulated reserves, although the initial tax rate established was below the levels needed to make the fund actuarially sound. Congress and the administration abandoned this goal with the Social Security Amendment of 1939 (Meriam 1946, p. 87; Weaver 1982, pp. 111–24; McSteen 1985, p. 39; Quadagno 1988, pp. 119–21; Berkowitz and McQuaid 1992, pp. 123–5, 130–6; Schieber and Shoven 1999, pp. 49–76). Since 1940, the OASDHI program has been a pay-as-you-go system funded by taxes on earnings for wage and salary workers and the self-employed. Workers and employers each pay a separate and matching tax (the self-employed pay the combined rate for workers and employers) to the federal government to fund the system. The rapid long-term rise in beneficiaries relative to the working population and the increase in average benefits relative to average workers' earnings has led to increases in the tax rates to fund the various programs. As seen in Table Bf-D, with only the OASI program to fund, the OASI tax rate was 1 percent for employers and 1 percent for workers on incomes up to \$3,000 in the late 1930s and 1940s. The OASI tax rate has risen to 5.35 percent each in 1999 on incomes up to \$72,600. The introduction of DI in 1957 tacked on an additional tax of 0.25 percent, which rose to 0.85 percent in 1997. Finally, the introduction of Medicare led to an additional tax of 0.35 percent, which since quadrupled to 1.45 percent in 1997. As of 1999, the total OASDHI tax rate paid by the worker was 7.65 percent, which was matched by the same 7.65 percent rate paid by the employer (see Table Bf377–394).

Not only has the tax rate risen, but the annual earnings subject to the tax rate have risen faster than the average workers' average annual earnings. Total earnings subject to tax have risen close to 90 percent of the earnings of covered workers (series Bf385 divided by series Bf384), while the percentage of workers reaching the maximum has fallen from 36 percent in 1965 to less than 6 percent in the early 1990s. The rise in earnings subject to Medicare

taxes followed the same path until the 1990s and then the Omnibus Budget Reconciliation Act of 1993 repealed the maximum. The OASDHI taxes are in many ways more regressive than the income tax. While the income tax does not apply to the lowest income earners, the OASDHI taxes are drawn on the first dollar of earnings. Further, the maximum limits on earnings subject to tax mean that the earners in the top 5 percent of the income distribution do not pay taxes on income beyond the limits. However, it should be noted that the working poor receive some relief from the OASDHI payroll taxes through the earned income tax credit.

The monies from the OASDHI taxes go into trust funds and are to be paid out of these trust funds. The information on assets, receipts, and expenditures for the OASI trust fund appears in Table Bf442–460. The government still maintains a trust fund. Certainly, discussions of the trust fund have dominated the discussions of Social Security in the political arena of the 1990s. It is a pay-as-you-go system with taxpayers paying the OASDHI taxes into the trust fund each year and benefits being paid out each year without a tight actuarial relationship between the two. In fact, the initial recipients of the Social Security benefits received a relatively large subsidy compared to the amounts that they paid into the system. Each succeeding generation that reached retirement has paid in taxes an increasing share of the pension benefits they received. The programs are sound in the sense that should the benefit claims exceed the monies allocated for benefits in the trust fund, the government is able to redirect resources away from other government expenditures to pay the benefits.

Assets in the OASI trust fund slowly built up from 1937 through 1956 in both real and nominal terms because it took time for the benefits paid each year to rise slowly toward 100 percent of receipts collected. The trust fund stayed relatively stable until the early 1980s when increases in tax rates and the arrival of the baby boom bulge in their prime working years caused assets in the fund in 1992 dollars to rise twelve-fold between 1984 and 1996. The process for funding the Medicare HI program is similar (see Table Bf558–567 for details), although assets in the fund declined drastically in 1982 when Congress allowed the OASI trust fund to borrow nearly half the fund to meet a substantial gap between receipts and expenditures. When the loan was repaid in 1985 and 1986, the assets rose sharply and continued to rise through 1992 as a result of an increase in the HI tax (series Bf391). During the 1990s there has been extensive discussion of possible problems with the Medicare trust fund because benefit expenditures have exceeded payroll tax collections. The shortfall in tax collections has the potential to increase in the future because the ratio of taxpayers to those eligible for Medicare is expected to fall, while the elderly population is living longer and health care costs per person are expected to increase.

The assets of the trust fund are largely “invested” in government securities (see series Bf451–452). The government securities are promises by the federal government to repay the principal of the securities plus the stated interest back into the fund sometime in the future. In essence, the federal government has been borrowing money from the trust fund assets each year to fund current government spending on programs other than Social Security. People have begun to worry because the baby boom generation is expected to begin reaching retirement age during the period 2010 to 2030, and the number of recipients per worker is expected to rise sharply. Given a continuation of the status quo, we can anticipate that the

assets in the trust fund eventually will be depleted, as expenditures on benefits exceed OASI tax receipts. Thus, the payment of Social Security benefits will begin to be covered by other tax receipts, leaving less room for funding of other government programs unless there are cuts in OASI benefits or increases in the OASI taxes.¹³

Workers' Compensation

At the turn of the century, prior to the introduction of state workers' compensation laws, workers could obtain compensation for workplace accidents under the common law if they could show that the employer was negligent. However, such a worker might still be denied compensation if the employer could invoke any of three defenses: The worker had known about and assumed the risk (assumption of risk); the worker's own negligence had contributed to the accident (contributory negligence); or a fellow worker had caused the accident (fellow-servant). A study analyzing several state surveys of families of workers who died in workplace accidents found that between 1900 and 1910 about half of such families received some compensation from the worker's employer, primarily in out-of-court settlements. The average compensation for those families who received a positive amount was about a year's income. When workers' compensation was introduced in the various states in the 1910s, all workers who experienced accidents arising out of or in the course of employment were to receive compensation. The present value of the streams of payments for fatal accidents ranged from roughly two to four times annual income across the states. The average amount of accident compensation received by injured workers and the families of fatalities probably went up between 70 to 200 percent with the introduction of workers' compensation (Fishback and Kantor 2000, Chapters 2 and 3).

During the late 1890s and early 1900s a number of states passed employer liability laws to limit some of the employers' defenses.¹⁴ In the railroad industry, the Federal Employer Liability Act (FELA) of 1908 retained negligence liability but eliminated the fellow-servant defense and weakened the contributory negligence defenses. The assumption-of-risk defense was later eliminated in 1939. Common law rules of negligence without the three defenses continue to govern workplace accident compensation for railroad workers today.¹⁵

Dissatisfaction with the existing common law system and the results of employer liability laws led employers, workers, and insurance companies to press for the enactment of workers' compensation, which would eliminate the fault basis for compensation. The federal government led the way by establishing a workers' compensation law for federal employees in 1908. As shown in Table Bf-F, between 1911 and 1920 forty-three states enacted workers' compensation laws to require employers to provide compensation for all accidents arising out of and in the course of employment that caused a worker to lose more than a few days of working time. The laws established basic parameters for compensation of injuries. After a waiting period of a few days, workers

would receive up to two thirds of their wages during the period of their disability, although the payments were typically capped by a weekly maximum. In turn, employers were required either to purchase insurance from a private or state fund, depending on the state, or to show that they had adequate resources to cover payments to injured workers. Workers' compensation rules vary across states along several dimensions. More detail on the variations in rules through 1929 can be found in Fishback and Kantor (2000), and information for the modern era is available in annual volumes titled *Analysis of Workers' Compensation Laws*, published by the U.S. Chamber of Commerce.

The number of workers covered by workers' compensation rose quickly when the states began adopting a permanent law during that period. When workers' compensation was first introduced, a number of types of employment were exempted, including agricultural workers, domestic servants, many railroad workers in interstate commerce, and, in some states, workers in nonhazardous employments. Further, workers hired by employers with fewer than three to five workers (varying by state) are exempted from the law. By 1940 employees earning wages and salaries accounting for 75 percent of wage and salary disbursements were covered by workers' compensation laws (series Bf283 divided by series Bf273). At the time that Mississippi, the last state to adopt workers' compensation, adopted in 1948, the percentage rose to about 78.1 percent. Since that time, a decline in domestic servitude, railroading, and agricultural employment, as well as expansions of workers' compensation coverage, has led to payroll coverage of about 92 percent.

Since 1929, real expenditures on workers' compensation programs, which continue to be administered by the states, have grown at an average annual rate of 5 percent per year (series Bf223, adjusted for inflation by the GDP deflator). The growth has been caused by expansions in the coverage of injuries and occupational diseases, as well as increases in benefits, even though workplace accident rates have declined since the beginning of the century.¹⁶ Workers' compensation costs as a percentage of covered payroll generally stayed around 1 percent until the late 1960s and early 1970; since then, costs have risen along a strong upward trend to nearly 2.5 percent in 1990 (series Bf520). The rise was driven in part by increased payments for benefits and medical coverage (series Bf521), as well as the introduction of the Black Lung Benefits program for coal miners in 1969.¹⁷ The rise in benefits can

¹³ For additional discussions of earlier crises and the potential crisis in financing Social Security and Medicare, see Weaver (1982); Berkowitz and McQuaid (1992); Wolfe (1993); Murphy and Welch (1998); and Schieber and Shoven (1999).

¹⁴ For descriptions of these laws, see Fishback and Kantor (2000), Appendix G.

¹⁵ For a description of the Railroad Compensation system, see Transportation Research Board (1994) and Kim and Fishback (1993).

¹⁶ Although workers' compensation was originally established to insure workers against workplace accidents, the programs in most states were expanded to cover occupation-related diseases. Starting with California in 1915, states began expanding the coverage of workers' compensation laws to include payments to workers' disabled by occupational diseases. By 1939, twenty-three states covered at least some occupational diseases. The states include California (1915), North Dakota (1925), Minnesota (1927), Connecticut (1930), Kentucky (1930), New York (1930), Illinois (1931), Missouri (1931), New Jersey (1931), Ohio (1931), Massachusetts (1932), Nebraska (1935), North Carolina (1935), Wisconsin (1935), West Virginia (1935), Rhode Island (1936), Delaware (1937), Indiana (1937), Michigan (1937), Pennsylvania (1937), Washington (1937), Idaho (1939), and Maryland (1939) (Balkan 1998, p. 64). As of July 1953, every state but Mississippi and Wyoming had at least some coverage for occupation diseases (U.S. Bureau of Labor Statistics 1953, p. 21). By the 1980s, all states had some form of coverage.

¹⁷ The workers' compensation series on costs as a percentage of the covered payroll contains some employer contributions to the Black Lung Benefits program, while the benefits series does not include benefits associated with the Black Lung Benefits program.

TABLE Bf-F The presence of state social welfare programs in the early 1900s

State	Workers' Compensation: year permanently enacted	Mothers' Pensions: year enacted (through 1935)	Old-Age Pensions: year enacted (through 1935)	Aid to the Blind: making cash payments as of August 1, 1935
Alabama	1919	1931	—	No
Alaska	1915	1917	1915	No
Arizona	1913	1917	1933	No
Arkansas	1939	1917	—	Yes
California	1911	1913	1929	Yes
Colorado	1915	1912	1927	Yes
Connecticut	1913	1919	—	Yes
Delaware	1917	1917	1931	No
Florida	1935	1919	—	No
Georgia	1920	—	—	No
Hawai'i	1915	1919	1933	No
Idaho	1917	1913	1931	Yes
Illinois	1911	1911	—	Yes
Indiana	1915	1919	1933	Yes
Iowa	1913	1913	1934	Yes
Kansas	1911	1915	—	Yes
Kentucky	1916	1928	1926	Yes
Louisiana	1914	1920	—	Yes
Maine	1915	1917	1933	Yes
Maryland	1912	1916	1927	Yes
Massachusetts	1911	1913	1930	No
Michigan	1912	1913	1933	No
Minnesota	1913	1913	1929	Yes
Mississippi	1948	1928	—	No
Missouri	1926	1917	—	Yes
Montana	1915	1915	1923	No
Nebraska	1913	1913	1933	Yes
Nevada	1913	1913	1925	Yes
New Hampshire	1911	1913	1931	Yes
New Jersey	1911	1913	1931	Yes
New Mexico	1917	1931	—	No
New York	1913	1915	1930	Yes
North Carolina	1929	1923	—	No
North Dakota	1919	1915	1933	No
Ohio	1911	1913	1933	Yes
Oklahoma	1915	1915	—	Yes
Oregon	1913	1913	1933	Yes
Pennsylvania	1915	1913	1934	Yes
Rhode Island	1912	1923	—	No
South Carolina	1935	—	—	No
South Dakota	1917	1913	—	No
Tennessee	1919	1915	—	No
Texas	1913	1917	—	No
Utah	1917	1913	1929	Yes
Vermont	1915	1917	—	No
Virginia	1918	1918	—	No
Washington	1911	1913	1933	Yes
West Virginia	1913	1915	1931	No
Wisconsin	1911	1913	1925	Yes
Wyoming	1915	1915	1929	Yes

Sources

Workers' compensation laws: Fishback and Kantor (2000), pp. 103–4.

Mothers' Pension laws: for laws enacted prior to 1920, see Thompson (1919), pp. 7–11; and for laws enacted after 1920, see Skocpol (1992), p. 457. See also Moehling (2002).

Old-Age Pensions: Stevens (1970), pp. 20–4; and U.S. Committee on Economic Security (1937), pp. 160–71.

Aid to the Blind: "Public Provision for Pensions for the Blind in 1934." *Monthly Labor Review* 41 (3) (September 1935): 584–601; reprinted in Stevens (1970), pp. 29–31.

Documentation

Workers' compensation laws. The year listed is the date at which a permanent law was enacted. New York passed a compulsory law in 1910 and an elective law in 1910, but the compulsory law was declared unconstitutional, and the elective law saw little use. New York passed a compulsory law in 1913 after passing a constitutional amendment. Kentucky originally enacted a law

in 1914, but that law was declared unconstitutional. The permanent law for Kentucky was enacted in 1916. The Missouri General Assembly passed a workers' compensation law in 1919, but it failed to receive enough votes in a referendum in 1920. Another law passed in 1921 was defeated in a referendum in 1922 and an initiative on the ballot was again defeated in 1924. Missouri voters finally approved a workers' compensation law in a 1926 referendum on a 1925 legislative act (see Kantor and Fishback 1994). Maryland (1902) and Montana (1909) passed earlier laws specific to miners that were declared unconstitutional.

Mothers' Pension laws. State provisions in Missouri (1911), California (pre-1913), Wisconsin (1912), Michigan (1911), and Oklahoma (1908) endowed funds similar to Mothers' Pensions in indirect ways. Some of the provisions were limited to specific cities, and others were indirect means of providing funds to dependent children. Arizona in a 1914 referendum passed a Mothers' Pension and Old-Age Pension system that hinged on the abolishment of the almshouses in the state, but it was found unconstitutional

(continued)

TABLE Bf-F The presence of state social welfare programs in the early 1900s *Continued*

(Thompson 1919, pp. 7–9). The 1917 Arizona law was also considered “unworkable,” and a new law was enacted in 1921 (Lundberg 1921). More detail on the specifics of Mothers’ Pension laws as of 1934 are available in Stevens (1970), pp. 28–9, and U.S. Committee on Economic Security (1937), pp. 233–49. There is some disagreement about whether Alabama had adopted a Mothers’ Pension law in 1931; members of the Children’s Bureau and later the U.S. Social Security Administration considered the law

to be explained in part by a series of amendments to state laws in the 1970s that sharply increased the weekly maximums that could be paid for benefits.

During the 1980s and early 1990s, rising medical expenditures have been a prime contributor to rising costs. Expenditures on medical and hospital benefits have risen to 40 percent of workers’ compensation expenditures since 1980 after accounting for less than one third of worker’s compensation expenditures for the rest of the century (see series Bf224 as a percentage of series Bf223; see also series Bf513 as a percentage of series Bf512). In the early 1990s, employers and insurers have begun managing their health care costs more closely and have limited the growth of medical costs. Similarly, disability benefits as a percentage of covered payroll have risen over time as reforms of workers’ compensation expanded the range of workplace injuries and diseases covered (series Bf515 as a percentage of series Bf283). In contrast, the percentage of the payrolls spent on paying the survivors of fatal accidents has stayed relatively constant at below 0.1 percent from the 1940s through 1970 and again from the 1980s to the present. There is one blip in the survivors of fatally injured series that needs some explanation (series Bf516). The percentage of covered payroll paid out to survivors of the fatally injured rose sharply between 1970 and 1973 because the federal Black Lung Benefits program was put into effect. The impact of the Black Lung Benefits program was so dramatic because of the accumulation of a number of years of survivors all being added to the system in the span of three years. As soon as the Black Lung Benefits program stabilized, the survivors’ benefits reached a steady state of about 0.1 percent of the payroll and have declined in the 1990s.

The general rise in workers’ compensation benefits as a share of the payroll should not necessarily be considered a sign that workplaces have become more dangerous. Workers’ compensation has increasingly provided benefits for a wide range of injuries and diseases for which compensation would not have been awarded earlier in the century. The series on the occupational injury and illness rate for all occupations shows that the number of cases of injury and illness per 100 workers in the private sectors has fallen by 32 percent since 1972, while the number of lost workday cases has stayed roughly constant (series Ba4750–4751).

Although the states establish the basic rules for compensation, employers can obtain insurance to cover their compensation responsibilities from private insurance carriers in the majority of states and from government-sponsored insurance funds in roughly half of the states, or employers can self-insure as long as they demonstrate sufficient resources to handle their benefit obligations. Between the end of World War II and 1970, the distribution of benefits paid by these various insurers stayed relatively constant. The percentage of benefits paid by private insurers was roughly 62 percent, by state and federal funds roughly 25 percent, and by

to be more in the nature of a poor-relief statute than the provision of long-term care for children (Abbott 1934; Bucklin 1939).

Old-Age Pensions. Arizona set up an Old-Age Pension subject to the elimination of almshouses in a referendum in 1915, but the pension was declared unconstitutional. Pennsylvania passed an Old-Age Pension law in 1923, but it was declared unconstitutional in 1924. Nevada also passed an act in 1923 that was replaced by the 1925 act listed in this table.

self-insurers about 12 to 15 percent (series Bf517–519, each as a percentage of series Bf512). The introduction of the Black Lung Benefits program in 1970 led to a sharp rise in the state and federal insurance funds, as a large number of workers not previously covered received federal coverage for black lung disease. Since 1973, the trend has been to return more of the insurance activity to private insurers, and many employers have increasingly self-insured.

Black lung (pneumoconiosis), which struck large numbers of long-time coal miners, is one of the most notorious occupational diseases. The Federal Coal Mine Health and Safety Act of 1969 established a Black Lung Benefits program to provide monthly benefit payments to coal miners who are totally disabled and to the widows and dependents of coal miners who died as a result of pneumoconiosis. Table Bf525–534 shows the number of persons receiving black-lung benefits under the two administrative systems.¹⁸ The SSA is responsible for the payment and administration of benefits with respect to claims filed through June 30, 1973 (and for certain survivor cases before December 31, 1973). The Black Lung Benefits Act of 1972 transferred to the Department of Labor jurisdiction over all claims after July 1, 1973. The number of recipients of black-lung benefits peaked around 1980 at over 500,000 people. The annual number of beneficiaries has halved since, in part as a result of declines in the number of underground coal miners. Another contributor to the decline has been the deadliness of the disease, which has caused the number of miners and their dependents who receive benefits to fall sharply; meanwhile, the number of widows receiving benefits has fallen at a much slower pace.

Unemployment Insurance

Although a few firms had experimented with unemployment insurance between 1894 and the 1930s, public provision of modern unemployment insurance was not established at any level of government prior to the 1930s (Lescohier 1966, pp. 259–69). A number of state legislatures considered the adoption of unemployment insurance during the late 1910s and 1920s, but only Wisconsin adopted a law in 1932 and began to administer it (Brandeis 1966, pp. 616–24; Berkowitz and McQuaid 1992, pp. 109–15). The Wisconsin system had not yet begun paying benefits when the Social Security Act of 1935 established UI as a federally mandated program run by the states. The states collect payroll taxes from employers to fund the system. Wisconsin,

¹⁸ The miners receive benefits that are 37.5 percent of the monthly pay rate for federal employees in the first step of grade GS-2, adjusted for the number of dependents. If a miner or surviving spouse is receiving workers’ compensation, unemployment compensation, or disability insurance payments under state law, the black-lung benefit is offset by the amount being paid under these other programs. The program is funded by a tax paid by employers per ton of coal mined.

based on its early start, was ready to pay benefits as early as 1936, while the remaining states first had to pass enabling legislation and then accumulate reserves for two years before the programs could begin paying out funds to unemployed workers. By 1938, roughly 75 percent of payrolls were covered by unemployment insurance (series Bf280 divided by series Bf273). The percentage rose to a peak of 98 percent in 1979 and fell back to about 92.4 percent in 1994. Covered employment includes employment in industrial and commercial establishments of eight or more for the period 1941–1955 and four or more for 1956–1970.¹⁹

To fund the system, employers pay taxes on employee earnings up to a specific maximum per employee in each state. Part of the taxes (0.4 percent of taxable wages in 1970) is remitted to the federal government, which in turn provides grants to the states for the cost of administering unemployment insurance and employment services. The payroll contribution rates for individual employers vary to some extent in response to the unemployment experience of workers in the employer's operation.

Unemployed workers begin receiving benefits in most states after a waiting period of one week is served. In the late 1930s the benefits typically replaced 50 percent of weekly earnings up to a weekly maximum benefit level. The weekly maximum has often served to reduce the percentage of average weekly wages paid to roughly 33 to 41 percent between 1940 and 1970, with a rate in 1995 around 35.5 percent (series Bf489). Since 1940, average weekly benefits in 1992 dollars have risen at a relatively slow average annual rate of less than 1 percent per year from \$103.3 in 1940 to \$173.9 in 1996 (series Bf488 deflated by GDP deflator). The states establish a maximum number of weeks that unemployed workers can receive payments. These durations ranged from 12 to 22.6 weeks in the late 1930s, depending on the state. The maximums have risen such that by 1970 workers could receive benefits for up to 20 to 36 weeks depending on the state. The average actual duration varies with the business cycle from as low as 7.7 weeks during the extraordinarily tight labor markets during World War II to over 14 weeks in 1958 and 1961, and again in 1995 (series Bf490).

As the labor force has expanded, average weekly benefits have risen, as has the maximum duration of benefits. Total benefits paid in 1992 dollars rose from \$2 billion in 1941 to more than \$20 billion in the 1990s (series Bf493 deflated by the GDP deflator). As a result, expenditures on unemployment insurance and employment service programs rose along a trend to where they comprised 6.2 percent of social insurance expenditures in 1993 (series Bf218). Of course, unemployment claims are cyclical, with total benefits paid peaking during recessions and declining during economic booms. The unemployed receiving insurance as a percentage of the covered employment payroll was as low as 2.0 percent in 1969 and as high as 6 percent in 1975 and 6.6 percent in 1958 (series Bf485 as a percentage of series Bf484).

Public Assistance Programs

The second leading contributor to the rise in public social welfare spending is public assistance programs. As of 1996, the govern-

¹⁹ In some of the states, the covered employment also represents employment in smaller establishments and for additional groups of workers, such as state and local employees or seamen. Although the federal law requires only employers to pay taxes, some states require some workers to contribute as well.

ments of the United States provided benefits to low-income households through a large number of programs: Aid to Families with Dependent Children (AFDC, which has since been replaced by Temporary Assistance to Needy Families), Medicaid, the Women, Infants and Children (WIC) programs, Food Stamps, General Assistance, work relief programs, Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled. In most cases, these programs are means-tested or provide funds to those with disability. Again, it should be noted that the division of social welfare programs into the specific categories of social insurance and public assistance is somewhat arbitrary and based on the statutory programs and the administrative structure of the programs. Users of the statistics might want to regroup programs into alternative categories.

Over the past seventy years, public aid expenditures, as defined by the SSA, rose from 0.1 percent as large as GDP in 1929 to more than 3 percent as large as GDP in the early 1990s (series Bf190). Prior to the 1930s, public assistance was exclusively the responsibility of state and local governments. There was enormous variation across counties and states in the provision of such services.

In the first few decades of the twentieth century, a number of state governments began to legislate forms of public aid that foreshadowed the aid programs for dependent children, the blind, and the elderly established by the Social Security Act of 1935. During the 1910s, a large number of states enacted mothers' pension laws, which provided for public assistance for dependent children in their own homes. The eligibility for such aid varied from state to state, but aid was most often provided for women with preteen children where the support of the husband was absent.²⁰ Table Bf-F gives an indication of the timing of the enactment of the mothers' pension laws. The U.S. Department of Labor reported that in forty states with mothers' aid laws about 121,000 children were receiving aid at any given time in 1921 and 1922 (U.S. Department of Labor 1932, p. 99). By June 1931, approximately 250,000 children were receiving \$35 million in aid in forty-four states and the District of Columbia. Still, the total public assistance expenditures were relatively small, as the SSA estimates that public aid expenditures were roughly 0.1 percent as large as GDP in 1929.²¹

The states were slower to introduce old-age pensions, which provided public funds to low-income elderly living outside of public almshouses and charity institutions. The dates of enactment of the various laws appear in Table Bf-F. The Alaskan territory led the way in 1915. Arizona citizens passed a referendum to establish old-age pensions, but the program was declared unconstitutional in 1916. At the end of 1928, Alaska, Colorado, Kentucky, Maryland, Montana, Nevada, and Wisconsin had laws that gave each county in the state the option to provide pensions. Yet only Montana and Wisconsin appeared to have established operative systems that were paying pensions totaling \$222,599 to 1,221 persons. From 1929 forward, the trend in legislation was to make the old-age assistance systems mandatory for counties. By 1932, eighteen

²⁰ Details on the various eligibility rules as of 1919 can be found in Thompson (1919, pp. 11–19). For a snapshot as of 1934, see Stevens (1970), pp. 28–9.

²¹ For descriptions of the mothers' pensions laws as of 1934, see Stevens (1970), pp. 28–9, reprinting materials from pp. 301–10 of U.S. Committee on Economic Security, 1937. For a general discussion of the development of mothers' pensions and their impact, see the work of Theda Skocpol (1992) and Carolyn Moehling (2002).

states were paying out pensions totaling \$22.5 million to 102,537 persons.²²

The final group that received cash assistance payments through state programs was the blind. Many states were generally involved in providing some form of educational and vocational training for blind children, workshops for the adult blind, and field work in providing medical assistance and aid in procuring employment. By August 1935, twenty-seven states were providing cash payments to the blind. Estimates by the U.S. Department of Labor showed that in 1934 approximately two thirds of the blind population was receiving some form of cash grants. The average value of monthly grants across the twenty-seven states was nearly \$20, but the averages ranged from a low of \$0.83 in Arkansas to a high of \$33.12 in California.²³

During the Great Depression, state and local governments increased their expenditures fivefold between 1929 and 1932 in response to the dramatic rise in unemployment. When the unemployment rate reached nearly 25 percent of the labor force in 1933, state and local governments and private charitable organizations claimed to be overwhelmed. During the first hundred days of the Roosevelt administration, a series of New Deal Emergency Assistance programs were established (see Table Bf663–678).²⁴ The initial program was the Federal Emergency Relief Administration (FERA) which spent nearly \$200 million between 1933 and 1935 for direct relief to families and work relief for able-bodied workers (about \$2 billion in 1992 dollars). In an attempt to increase federal employment through work relief in the short run, the Civil Works Administration (CWA) spent more than \$700 million between November 1933 and March 1934. Meanwhile, the Civilian Conservation Corps spent more than \$230 million per year for the rest of the decade as they worked to conserve forests, farmland, and other natural sites while providing work and educational opportunities for young men. Possibly the most famous of the New Deal programs was the Works Progress Administration (WPA), later renamed the Works Projects Administration, which provided work relief for unemployed “employables.” The WPA spent between \$1 billion and \$2 billion per year from 1936 through 1940 building schools, roads, post offices, sidewalks, and a host of other projects. The National Youth Administration and the Farm Security Administration were smaller programs that, respectively, employed students and provided aid to farmers in obtaining their own farms. In sum, well over thirty New Deal programs provided aid of some sort during the 1930s. The sudden influx of federal monies caused public aid expenditures to rise as high as 4.6 percent as large as GDP between 1934 through 1940, a percentage that has not been reached again during the long-term rise in public aid expenditures over the past 60 years (series Bf190).

²² See Brandeis (1966), pp. 613–6; Stevens (1970), pp. 20–24, based on U.S. Committee on Economic Security (1937), pp. 156–70; Quadagno (1988), pp. 51–75; and Costa (1998), pp. 166–7.

²³ U.S. Department of Labor (1935), pp. 584–601. See also Stevens (1970), pp. 29–31.

²⁴ The Hoover administration in 1932 established the Reconstruction Finance Corporation, which made some loans to state and local governments to help finance relief expenditures in addition to its loans to banks and industries. The loans do not appear in the tables on emergency relief spending because they were expected to be repaid and, thus, were not considered a net cost to the federal government. The impact of the loans will appear in the estimates of assistance provided by state and local governments.

Activities at the state and local level did not cease in 1933 when the federal government began providing relief through New Deal programs. As can be seen in Table Bf621–633, public assistance provided by state and local governments to the aged, dependent children, and the blind and general assistance rose from \$837 million in 1933 to \$1,665 million in 1935 (more than 85 percent of the expenditures were for general assistance). The number of cases receiving general assistance was 3.2 million in 1933, 5.4 million in 1934, and 2.9 million in 1935. When the WPA replaced the FERA, the federal government disclaimed responsibility for what it defined as unemployables, low-income people who were not considered capable of working. State and local expenditures on direct relief to the unemployables are included under the heading “general assistance” in the public assistance tables (series Bf625 and Bf638). To help fill the void for some groups and building on the precedents established by earlier state legislation, the Social Security Act of 1935 established three joint state and federal programs for Old-Age Assistance, Aid to the Blind, and Aid to Dependent Children (ADC). In October 1950, Congress amended the Social Security Act to provide aid to the totally and permanently disabled. The Old-Age Assistance, Aid to the Blind, ADC, and Aid to the Disabled programs under the Social Security Act are designed to be joint programs with the federal government providing grants to the states and the states providing additional funds and administering the programs.

A number of the programs have gone through administrative changes. Through legislation enacted in 1972 and effective in 1974, the Supplemental Security Income (SSI) program superseded the Aid to the Blind, Old-Age Assistance, and Aid to the Disabled programs, except in the U.S. territories of Guam, Puerto Rico, and the Virgin Islands.²⁵ The program for ADC began paying benefits to support payments for a mother or other relative caring for the child in 1950. Under the Public Welfare Amendments of 1962, the program was renamed Aid to Families with Dependent Children to reflect expanded coverage of the adults caring for the dependent children. The AFDC and the Emergency Assistance (EA) programs (series Bf637 and Bf639) have been replaced by the Temporary Assistance for Needy Families (TANF) program under the Personal Responsibility and Work Opportunity Reconciliation Act of 1996. The act was designed to limit the length of time that families could receive assistance and to promote a return to the workforce by those who are able.

The two public aid programs with the fastest growth have been the programs aiding children and the disabled. The number of recipients in the ADC program grew at an average annual rate of 7 percent per year between the end of World War II and the change to AFDC in 1962. The number of recipients then exploded at an average annual rate of 12 percent per year from 1962 through 1971 to reach nearly 10 million. The average monthly number of recipients leveled off at around 11 million before jumping sharply again from 1989 through 1994 to more than 14 million (series Bf630 and Bf644).²⁶ Annual payments show a generally similar

²⁵ For more information on the extent of state supplementation under SSI, see Table Bf591–598.

²⁶ To develop a long-term time series for average monthly benefits, number of recipients, and total spending over the period 1936 to 1973 for AFDC (formerly ADC), General Assistance, Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled, users will be forced to splice together two sets of series reported by the SSA in Tables Bf621–662 The U.S. Social

pattern, although it is somewhat amplified by changes in monthly benefits per recipient, which were around \$83 (1992 dollars) in the late 1930s (series Bf624 and Bf637). The average benefits rose above \$150 (1992 dollars) through the transition to AFDC and into the 1970s. They stayed in the same range during the 1980s but fell off to around \$124 prior to the transition to TANF. This decline in the average benefits per recipient may reflect a decline in the average number of children in the families receiving benefits. Just as the average number of children in families in the overall population has fallen, so it appears has the average number of children in families receiving AFDC. The share of the recipients who are children rose slowly from around 73 percent in 1936 to a peak of around 77 percent circa 1960, just before the transition to AFDC. Since then, the share experienced a secular decline to around 65 to 66 percent in the 1990s (series Bf645 as a share of series Bf644 and series Bf631 as a share of series Bf630).

The SSA began offering federal aid to the permanently and totally disabled in October 1950. The program grew from aiding 69,000 recipients in its first year to 1.2 million recipients in 1973 (series Bf628 and Bf642). Since the SSI program was established in 1974, the number of recipients has more than tripled from 1.6 million in 1974 to more than 5 million in 1995, as the coverage of disabilities has expanded (series Bf614 and Bf642). In contrast, the number of recipients of Aid to the Blind rose from 45,000 in 1936 to a peak more than 100,000 in the early 1960s, fell to 78,000 in 1973, and then rose again to an average annual number of about 84,000 in the 1990s (series Bf613, Bf627, and Bf641). The development of the Social Security old-age pensions and Medicare for retired workers and survivors has reduced the number of Old-Age Assistance recipients since 1950 and kept benefits low (series Bf609, Bf626, and Bf640). The number of Old-Age Assistance recipients rose from 1.1 million in 1936 to 2.7 million in 1950, but it fell back to 1.5 million in 1995.²⁷ Meanwhile, average monthly benefits in 1992 dollars rose to about \$250 in the late 1950s and have generally fallen below that level since 1970.²⁸

and Rehabilitation Service reported information on AFDC to the SSA through 1975. However, beginning in the *Social Security Bulletin, Annual Statistical Supplement, 1976* (p. 200), data on the public assistance programs were reported from a different source, and the new series reported were considered not comparable. In later years, the SSA has reported a consistent series for 1960 to the present and for the years 1960, 1955, 1950, 1945, 1940, and 1936. Both sources are reported here to allow users to develop their own means of interpolating the annual information for the years prior to 1960. Correlations of the monthly benefit figures between the two sets of series and are very high. In Table Bf649–662, the correlations between the two versions of the series for the overlapping years of 1936, 1940, 1945, 1950, 1955, and 1960–1973 are 0.998 for average monthly benefits for Old-Age Assistance, 0.999 for Aid to the Blind, 0.998 for Aid to the Permanently and Totally Disabled, 0.977 for AFDC per family, 0.998 for AFDC per recipient, and 0.999 for General Assistance.

²⁷ Annual information on the number of recipients, amount of payments, and monthly benefits for Old-Age Assistance, Aid to the Blind, and Aid to the Disabled is provided in Tables Bf599–662. In addition to the problems described in the text, a consistent series for the entire period 1936 to 1996 requires that information on the SSI versions of the programs in Table Bf599–620 for the years after 1974 be combined with the information for the territories of Guam, the Virgin Islands, and Puerto Rico, which have remained under the old programs in Table Bf634–648. This fact helps to explain the precipitous drops in each of these series in Tables Bf634–662.

²⁸ The monthly benefits comparisons for Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled splice together three series.

Average monthly benefits in the Aid to the Blind program (series Bf619, Bf650, and Bf657) and permanently disabled programs (series Bf620, Bf651, and Bf658) have risen somewhat faster than inflation since their beginnings. Average monthly benefits in 1992 dollars in the Aid to the Blind program rose from \$250 per month per recipient in 1936 to more than \$350 under the SSI program in 1995. Meanwhile, Aid to the Permanently Disabled rose from less than \$250 in 1950 to more than \$350 in the 1990s (in 1992 dollars). Recipients in both programs experienced spikes in 1974 with the transition to SSI and again in 1978. It should be noted that the average benefits in all three programs are well under the statutory maximums. The difference is determined by the extent of disability and the resources available to the person and his or her family.²⁹

The General Assistance programs are state-run programs. The expansion of the federal programs for increasing numbers of categories has appeared to reduce the pressure on the states for general assistance. After the huge numbers receiving relief during the 1930s, the number of recipients of general assistance has generally never been higher than 1.4 million in any year (series Bf632 and Bf646). However, the General Assistance program experienced a rapid growth rate of 6.3 percent per year during the initial stages of the War on Poverty in 1964 to 1970. Average monthly benefits per recipient of General Assistance in 1992 dollars have generally been lower than those of Aid to the Blind and Aid to the Disabled, peaking around \$250 in 1977 and falling back to \$210 in 1982 (series Bf654 or series Bf661 deflated by GDP deflator). Since that time, information on spending in monthly benefits has not been available.

When the federal government established Medicare in 1965 to provide medical insurance for retired workers, it also developed Medicaid to build on and then take over earlier programs for paying vendors for the provision of medical care to persons with low incomes. Medicaid established a federal–state matching entitlement program that provides medical assistance for certain individuals and families with low incomes and resources. The program is a jointly funded, cooperative venture between the federal and state governments. Each state establishes its own eligibility standards, range of services, rates of payment, and administration.

The federal government first became involved in helping to fund payments to vendors of medical care in October 1950 through a Title I amendment to the Social Security Act. The expenditures were made under the programs for assistance to the elderly, blind, disabled, and families with dependent children, which typically involved federal, state, and local activities. The federal government

The three programs were superseded by SSI in 1974 in all states and the District of Columbia, so the series shows the average benefits paid under SSI to this group (the benefits are artificially high in comparison with the earlier years because the low benefits for recipients in Guam, Puerto Rico, and the Virgin Islands are not included). So for the Old-Age Assistance program, we have used series Bf618 from 1974 to 1996, series Bf649 for the period 1936–1959, and series Bf656 for the period 1960–1973.

²⁹ The average monthly benefits listed in series Bf603 are lower than the maximum benefits available because the benefits are adjusted downward as households have access to increasing resources. The monthly SSI benefit rate for persons who are eligible for the maximum rose from \$140 for an individual (\$195 for a couple) in 1974 to \$484 for an individual (\$726 for a couple) in 1997. The SSI also provides an additional increment for an “essential person” in the household rising from \$70 in 1974 to \$242 in 1997. See Social Security Administration, *SSBASS* (1997), p. 92, for listing of legislative history of maximum benefits.

was not involved in medical assistance under the General Assistance programs, which were financed entirely from state and local funds. Medical assistance for the aged under Title I of the Social Security Act was initiated in October 1960 under the 1960 Social Security amendments (series Bf585). The earlier programs for medical care vendor payments (except for General Assistance) were rolled into the Medicare program in 1970.

From the time the federal government became involved in helping to fund payments to medical vendors in 1951 until Medicaid was legislated in 1965, the medical vendor payments skyrocketed at an average annual growth rate of 18.9 percent per year from \$527 million in 1951 to \$7.8 billion in 1966 (series Bf582 adjusted by the GDP deflator to express the amounts in 1992 dollars). State and local governments were likely to have already been providing some payments to medical care vendors prior to 1951 because the \$47 million dollars in General Assistance spending in 1951 was not financed by any federal spending (series Bf590).

Since 1972, the number of Medicaid recipients has grown at roughly 3 percent per year, while vendor payments in 1992 dollars have risen by 7.6 percent per year. Average payments per recipient in 1992 dollars have risen 4.6 percent per year from \$1,070 in 1972 to \$3,057 in 1996 (series Bf568 and Bf575, with adjustments by the GDP deflator).

In the late 1960s, Congress established a series of additional programs for persons with low incomes. In 1969, Congress established an Emergency Assistance program, which has been rolled into the TANF program and has been aiding more than 50,000 families per month. The Food Stamp program, which began in the early 1960s, was designed to provide low-income households with a means for obtaining an adequate diet by providing them with coupons redeemable for food and for garden seeds and plants. The percentage of the population participating in the Food Stamp program rose sharply in the 1970s to more than 9 percent, dipped during the late 1980s, and was above 10 percent in the mid-1990s (series Aa110 and Bf689). Meanwhile the average monthly value of bonus coupons in 1992 dollars fell sharply during the 1960s to a trough of less than \$23 and rose to nearly \$70 in the mid-1990s (series Bf691 deflated by GDP deflator).

Another form of public aid, included in series Bf231, has been the development of work-experience training programs. The Manpower Development and Training Act of 1962 and the Equal Opportunity Act of 1964 "spawned a myriad of categorical programs in almost frantic succession" (Franklin and Ripley 1984, p. 6). In 1973, Congress passed the Comprehensive Employment and Training Act (CETA) in a political compromise that replaced the profusion of earlier programs. Whereas the earlier programs tended to be federally run, CETA provided block grants for more decentralized programs. CETA was replaced in 1983 by the Job Training Partnership Act, which furthered the process of decentralization.

Legislation in 1981 established the Low-Income Home Energy Assistance (LIHEAP) program. Block grants administered by Health and Human Services (HHS) are provided to the states to assist low-income households in meeting home energy expenses (Table Bf708–716). Since 1982, between 5 and 9 percent of American households annually receive such assistance. Average LIHEAP assistance expenditures per household in most programs have been in the \$60 to \$300 range (1992 dollars). The largest annual average expenditures are in the weatherization program, which typically involves capital expenditures, starting at around \$400 in 1982 and rising to more than \$1,600 in the mid-1990s (1992 dollars).

Health and Medical Programs

The most controversial area of social welfare spending over the past two decades has been public programs for health and medical care. The SSA offers two sets of series on public expenditures on health and medical programs. The first set includes direct spending on public hospitals, military health care, public medical research, school health programs, and medical facilities (series Bf191 and Bf232–240). Expenditures on medical care through veterans' programs, social insurance programs such as Medicare, and public assistance programs such as Medicaid are not included in these series but are listed under the series on public expenditures on health and medical care under other programs (series Bf241). The reason for the exclusion is that these types of expenditures are already included under other parts of the public social welfare expenditures tables.

Those users who seek to combine all health and medical expenditures into one category, no matter how the funds were administered, will find the series on all public expenditures on health and medical care programs useful. Series Bf242 combines expenditures for health and medical care programs with all of the other spending on health and medicine for workers' compensation, public aid, veterans' programs, and Medicare. These totals for all public expenditures are then separated into the categories of health and medical services, research, and facilities construction.

Direct public expenditures on health and medical care programs outside of expenditures under Medicare, Medicaid, and veterans' programs have grown from about 0.3 percent as large as GDP in 1929 to about 1 percent as large as GDP since the 1970s (series Bf191). In general, the federal share of these direct health and medical expenditures has risen from roughly 12 percent in the 1930s to more than 40 percent in the 1990s (see series Bf199 and Bf207). The federal share sharply spiked to 77 percent when federal spending on military health care caused public health care expenditures to exceed 1 percent of GDP in 1943 to 1945.

Although the data in the tables begin in 1929, there was a history of public spending on health and medical care in earlier years. As just one example of a combined federal and state program, consider the spending by the U.S. Children's Bureau authorized by the Shephard-Towner Maternity and Infancy Act of 1921. The Act appropriated about \$7 million in federal money for grants in aid to states for the promotion of maternal and infant health and welfare and was distributed between 1922 and 1929. According to the Children's Bureau, this legislation led to expansion of the Birth Registration and Death Registration Areas, establishment of state child-hygiene bureaus and divisions, establishment of permanent state health centers for mothers and children, and, perhaps most important, an accompanying increase in state appropriations for infant and maternal health (U.S. Children's Bureau 1930, pp. 1–3; see also Berkowitz and McQuaid 1992, pp. 73–7). In the SSA listings, the Shephard-Towner spending would appear under series Bf236. The lack of values in the early 1930s in this SSA series may reflect an inability to effectively determine state and local spending on this issue.

Expenditures on health and medical care under other administrative structures include medical expenditures under workers' compensation, under Medicare, and under Medicaid and other public assistance payments to vendors (series Bf241). The expenditures fluctuated between \$1 billion and \$2 billion (1992 dollars) until the introduction of Medicare in 1966. Rising health care costs

have contributed to an explosion in these expenditures since that time, as they grew to more than \$10 billion by 1979 and doubled to more than \$20 billion by 1989 (1992 dollars).

During the post–World War II era, the United States has probably been the world leader in medical research, partially as a result of public financing. Public expenditures on medical research were under \$30 million until 1947 when in one year they jumped to 149.7 million (series Bf237, converted to 1992 dollars). They first reached \$1 billion in 1957 and then experienced another rapid rise to over \$5 billion by the 1966. They held steady between \$5.5 billion and \$6 billion into the mid-1970s and have risen steadily since to over \$13 billion today. On the other hand, public spending on medical facilities construction peaked between \$3 billion and \$4 billion in the late 1970s and has tailed off since (series Bf240, converted to 1992 dollars).

Education Programs

Public expenditures on education have also outstripped GDP since 1929, growing in real terms at an average annual rate of about 4.5 percent per year. As Claudia Goldin notes in the essay on education in Chapter Bc, one of the keys to growth in the American standard of living has been our educational system. Since World War II, educational expenditures have risen from 1.7 percent as large as GDP in 1947 to roughly 5 percent as large as GDP in 1993. The fastest growth in educational expenditures, as defined by the OECD, occurred in the 1960s and 1970s, when average annual rates of growth in real expenditures neared 8 percent per year. Over the course of the twentieth century, the mix of spending has gone through several changes. As a larger share of the population in each new generation has extended their schooling beyond high school, the shares of public spending on higher education have increased from less than 10 percent to just over 20 percent of public educational spending (series Bf258). Following a sharp rise immediately after World War II, the higher education share peaked in 1984 at around 24 percent and has since declined to just above 20 percent as renewed emphasis was placed on elementary and secondary education. Public spending on vocational and adult education received a boost during the New Deal and then expanded rapidly to a peak of 7 percent of educational spending during World War II (series Bf260). Interest in vocational and adult education was renewed in the 1960s, but spending was virtually eliminated in the mid-1980s. One caveat about the vocational and adult education series: they do not include job training programs such as CETA.

Veterans' Programs

The U.S. government has always provided social insurance, hospitals, and medical care for its veterans (see Clark, Craig, and Wilson 2000). As discussed earlier, pensions for Civil War veterans set precedents for establishing old-age pensions for the general public. Public spending for veterans since 1929 typically has been less than 1 percent of GDP except during periods immediately following major wars (series Bf192). The most unusual increase in the series came when Congress voted to pay a “veterans’ bonus” of \$2 billion dollars (\$20 billion 1992 dollars) in 1936 over Franklin Roosevelt’s veto. The bonus provided for the immediate payment to veterans of World War I of their adjusted compensation certificates, which were supposed to come due in 1945. The bonus

caused a one-time jump in the veterans’ “welfare and other” series and caused the overall veterans’ series to rise to 4.6 percent as large as GDP in 1936 (series Bf192 and Bf254).

Between 1929 and the end of World War II, except for 1936, two thirds of the veterans’ spending was for pensions (series Bf247). The disability pension program, which is described in more detail in Table Bf762–772, accounts for roughly 50 to 60 percent of veterans’ spending, except for the immediate aftermath of World War II.³⁰ Immediately following World War II, the GI bill, designed to provide educational opportunities for returning veterans, caused veterans’ educational spending to rise to around 40 percent of veterans’ spending for 1947–1950 (series Bf252). The educational spending tailed off to less than 10 percent by 1960 and remained below 10 percent until the early 1970s, when the aftermath of the Vietnam War led to more educational programs for returning veterans. As in other areas, health and medical spending for veterans has become increasingly important. Health and medical spending accounted for less than 10 percent of veterans’ spending prior to World War II. Since World War II, health and medical spending has consistently outpaced all other forms of spending, rising to 42 percent of veterans’ spending by 1993.³¹

Public Housing Programs

Public expenditures on housing consist of payments for public housing and housing subsidies for low- and moderate-income families. Federal public housing expenditures got their start under the Housing Division of the Public Works Administration (PWA) during the New Deal with a strong burst of building activity in late 1935 and 1936. The PWA projects were then taken over by the U.S. Housing Authority in 1937, which began a new public housing building program, spending about \$40 million per year during the late 1930s (1992 dollars). The spending jumped to close to \$100 million per year during World War II and then jumped more than \$1 billion in 1946 and 1947 (1992 dollars). Spending fell back to \$43 million in 1949 and then rose continuously to about \$1.8 billion in 1969 (1992 dollars). Since legislation in 1965, the U.S. Department of Housing and Urban Development (HUD) has overseen the housing programs.³² After the Housing and Urban

³⁰ Included among the array of veterans’ benefits are two major cash programs: the Service-Connected Disability Compensation program and the Nonservice-Connected Disability and Pension program. The service-connected program pays monthly benefits to honorably discharged veterans who are disabled as a result of injury or disease incurred while in or aggravated by active military duty. In addition, the surviving spouse, dependent children, and certain parents of veterans who die as the result of an injury or disease incurred while in or aggravated by active military duty are also eligible for compensation under the Dependency and Indemnity Compensation (DIC) program. Both disability compensation and DIC benefits are not means-tested. The second cash program provides for means-tested monthly benefits for honorably discharged wartime veterans with limited income and resources who are permanently and totally disabled as a result of a condition not related to their military service. The amount of benefit varies with the number of the veteran’s dependents and the severity of the veteran’s condition. Pensions for nonservice-connected death are based on need and are paid to surviving spouses and dependent children of deceased wartime veterans.

³¹ Additional discussion of the veterans’ programs can be found in Chapter Ed.

³² HUD oversees a wide variety of programs not included in these expenditures, including the Federal Housing Administration (FHA), which insures loans for mortgages and home rehabilitation, and the General National Mortgage Association (Ginnie Mae).

Development Act of 1970 established a national growth policy, public housing expenditures skyrocketed in the 1970s, rising more than 18 percent per year to a level of \$11.4 billion in 1980 (1992 dollars). The growth rate slowed to 7 percent per year in the 1980s. Since 1989, the annual expenditures have been around \$20 billion (1992 dollars). Government expenditures on housing were focused on public housing provision until the beginning of the 1950s, when state governments began providing subsidies for housing for low- and moderate-income families that accounted for 39 percent of the public housing expenditures. The focus of spending soon returned to public housing through the rest of the 1950s, and then shifted back toward subsidies at the federal, state, and local levels through the mid-1970s, when resources devoted to public housing began increasing again (see series Bf194, Bf202, Bf210, and Bf262).

Other Public Social Welfare Programs

The catchall category in Table Bf263–270 includes spending on vocational rehabilitation, child nutrition, child welfare spending, ACTION, and Office of Economic Opportunity (OEO) programs. Expenditures in these areas have risen about 5 percent per year in real terms since 1929, with the most rapid growth occurring during the 1960s during the War on Poverty. Most of the increase in this miscellaneous category is on programs for child nutrition, including surplus foods under the National School Lunch and Child Nutrition Act. The special OEO and ACTION programs got their start in the mid-1960s. In 1971–1972 the VISTA, foster grandparents, and other volunteer programs were consolidated under the ACTION rubric. Expenditures rose through 1973 and had a significant one-year increase to \$3.8 billion at the end of the Carter administration; successive administrations have reduced the spending well below \$1 billion per year (1992 dollars).

Private Social Welfare

The impressive growth of public social welfare expenditures and programs sometimes causes us to forget that private entities play an important role in providing assistance to low-income households, insurance, health care spending, and education. Consequently, the growth in public spending has been complemented by similarly rapid growth in private spending on social welfare services. The SSA has developed two sets of estimates of private social welfare expenditures for the periods 1950–1978 and 1972 to the present. Neither of the series is a precise private counterpart of the SSA's public social welfare expenditure series. As seen in Figure Bf-B, private social welfare expenditures have risen from less than 5 percent as large as GDP in 1950 to 13 percent as large as GDP in the 1990s. We do not have good aggregate estimates for private social welfare spending for earlier periods.

Prior to the introduction of the public social welfare programs of the twentieth century, households followed a number of strategies for protecting themselves against misfortune. In the early 1900s, compared with today, households faced greater risk of workplace injury, similar risk of unemployment, and greater risk of disability and illness. With only limited access to public social insurance and relief at the local level, individuals and families developed a number of strategies for dealing with these problems. Many of these methods cannot be easily measured and turned into aggregate

national statistics. To deal with the problems of old age, the elderly often lived with their children and their families or in close proximity to relatives. To deal with unemployment, illness, injury, or death, a number of families sent wives and children into the work force.³³ To varying degrees, employers and unions also provided some aid for families of workers injured on the job or fallen ill (Berkowitz and McQuaid 1992, pp. 11–34, 50–67; Jacoby 1997, pp. 10–34).

Both in past and present labor markets, varying combinations of competition for labor among employers and collective bargaining have forced employers to pay higher wages for jobs with greater risks of injury or unemployment. Estimates of the implicit value of life implied by the higher wages have risen over time to a range of approximately \$1 million to \$10 million in modern labor markets (Moore and Viscusi 1990; Fishback 1998). The higher wages probably did not fully compensate workers for their expected losses, but households used the higher wages to purchase limited amounts of life and accident insurance and to obtain some protection against accidents and sickness by joining mutual societies through employers or fraternal organizations. A number of households accumulated precautionary savings, but these were often not large enough to protect against the loss of the household head's income for more than a few months. Others used pawn shops and other informal sources of credit to tide them over (Haines 1985; Rotella and Alter 1993). People with low incomes without these resources sometimes obtained limited support from local governments, charities, or community groups.

The introduction of public social welfare programs may have partially replaced many of these private mechanisms for dealing with the risks and vicissitudes of life. Social Security pensions appear to have freed the elderly to maintain separate households. Increases in benefits for workers' compensation and unemployment insurance have been shown in a number of studies to be associated with reductions in the wages paid by employers (Moore and Viscusi 1990; Fishback 1998). A number of economists have found evidence that Social Security and other social insurance programs reduce precautionary savings and insurance purchases by households (Feldstein 1974, 1982; Leimer and Lesnoy 1982; Fishback and Kantor 2000). Even charitable donations and organizational activities have been found to be crowded out by public programs in some studies (Abrams and Schmitz 1984; Ziliak 1996, 1997). On the other hand, many of these changes have been marginal responses that apparently have been swamped by other factors because private social welfare spending over the past fifty years has followed an upward trend similar to the one displayed by public social welfare spending (see Figure Bf-B).

The most rapid growth in private social welfare spending since 1972 has come in expansions in the category for income maintenance spending, which is essentially expenditures for employee benefit plans for retirement pensions, life and disability insurance, and supplemental unemployment insurance (series Bf790–795). Since 1972, expenditures on these plans have risen at an average annual rate of 6.3 percent per year after adjusting for inflation. The largest expansion within employee benefit plans has been in private pension plans, which have risen more than

³³ For descriptions of various family strategies, see Modell (1979); Graebner (1980); Goldin (1981); Haines (1985); Keyssar (1986); Rotella and Alter (1993); Haber and Gratton (1994), and Costa (1998).

fivefold in real terms between 1972 and 1994, in part as a result of the expansion of pension options available to employers (Kerns 1995). This rise in private pensions continues a longer trend from the beginning of the twentieth century. The railroad industry was the leader in providing pension plans in the late nineteenth century, and a few other large firms followed suit (Latimer 1932). In 1920, approximately 3 million workers were covered by pension plans (Craig 1995, p. 309; see also Ransom, Sutch, and Williamson 1993). By 1950 approximately 10 million private employees were covered by employer pension plans, and the number had tripled by 1970 (see Table Bf836–853). Similar stories can be told for life insurance, disability insurance, and health insurance benefits, although the growth rates in disability insurance and life insurance expenditures over the past twenty years have not matched the growth in pension spending (Tables Bf786–835 and Bf854–874).

Expenditures of private funds on welfare services by private social service agencies, such as family service agencies, adoption services, group foster homes, the YMCA, the Boy Scouts, and a wide range of other programs, have risen nearly as fast as spending on income maintenance—6 percent per year in real terms since 1972 (series Bf777).³⁴

Even the slowest-growing category of private social welfare spending—education—has grown at an average annual rate of 3.6 percent per year in real terms between 1972 and 1994. This growth is slightly faster than the growth in public spending on education. About 50 percent of the private spending throughout the period has been on current operations in higher education, while about 13 to 15 percent is devoted to current operations in vocational education (see Kerns 1995, p. 69).

An important component of private social welfare spending is expenditures on health care. The U.S. health care system contrasts with the public health care systems of many other countries in that our system is financed by a mixture of direct private spending, spending under health insurance (often provided as benefits by employers), and public programs. Private health expenditures in 1992 dollars have grown at a pace of approximately 5 percent per year since 1960 (series Bf876 deflated by the GDP deflator).³⁵ Despite this rapid growth, the expansion of Medicare and Medicaid has caused the privately financed share of health care expenditures to fall from 75 percent in 1960 to 54 percent in the 1990s (series Bf876 as a percentage of series Bf875).

One of the major changes in the financing of health care expenditures has been the rise in the role of private health insurance. While payments from health insurers financed only 29 percent of private health expenditures in 1960, by the 1990s health insurance paid for roughly 60 percent of all private health expenditures (series Bf879 as a percentage of series Bf876). This figure might understate the involvement of insurers in medical transactions because the leading alternative category—series Bf878, out-of-pocket medical expenditures by consumers—includes the consumer payments of copayments and deductibles required by health insurers. The rise in the extent of private health insurance coverage of the population has been even more dramatic. Since 1940, the num-

ber of people with private health insurance has risen sharply from 12 million to more than 180 million in the 1990s (series Bf887). The rise has been dramatic, but the absence of universal coverage of the population has been a leading public policy issue during the 1990s and early twenty-first century.

The current system of health insurance coverage evolved from “sickness” insurance, which was the primary form of health insurance sold in the early part of the twentieth century through the 1930s. Sickness insurance was designed to replace lost income from illness rather than to pay medical bills. Sickness insurance is still sold today, but the majority of the private protections against lost income from sickness are found in employer programs (Tables Bf854–874).

As medical care became more effective and expensive, Blue Cross (and later Blue Shield) was an early leader in developing health insurance that paid for the direct costs of obtaining medical care. The “Blues” provided coverage to roughly half of the people with insurance in 1940 (series Bf891 as a percentage of series Bf887). A substantial part of the rise in health insurance coverage of medical costs has come from group insurance plans through the person’s employer. Tables Bf802–835 show the dramatic rise in health insurance coverage for employees between 1950 and 1976, the point at which these series were no longer collected. The rise was driven in part by federal tax policies during World War II, which were later clarified and encoded by the Internal Revenue Code of 1954, which freed employers from paying taxes on the value of health insurance provided to their workers (Thomasson 1998). The most recent trend in the health insurance industry has been the rise in the number of people covered by health maintenance organizations (HMOs) and other managed care plans. Over the past twenty years the percentage of persons insured by HMOs, managed care plans, and miscellaneous insurance has risen from 10 percent to nearly two thirds (series Bf892 as a percentage of series Bf887).

Summary

“Expansion” is the single best word to use in describing social welfare expenditures during the twentieth century in America. Expenditures have risen at a much faster rate than GDP as the coverage of programs has expanded and the average payments to beneficiaries have increased. Public programs have proliferated, and private social welfare spending has also risen at a rapid pace. Social welfare spending from both public and private sources has grown from less than 10 percent as large as GDP to more than 30 percent as large as GDP over the past ninety years. The result has been a dramatic change in the institutional landscape with regard to social insurance and public assistance. Responsibility for many forms of social welfare activity has shifted from the individual and private organizations to state and local governments to the federal government, although the federal programs are often administered and funded in conjunction with state and local governments. Some public programs, such as Social Security, have expanded in ways that have led to significant public discussion of the possibility of future breakdowns in the government’s ability to maintain the promises made to the workers who are currently funding them. Similar problems have arisen in our complex public–private system of health care. The discussions have led to new proposals of innovative ways of dealing with these issues, which in turn may well lead to more complex arrangements in the future.

³⁴ More extensive information on private philanthropy is available in Chapter Bg.

³⁵ The SSA obtained its estimates for private spending on health care (series Bf774) from the Health Care Financing Administration, which has reported a longer time series for 1960–1997 in series Bf876.

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POOR RELIEF

Joan Underhill Hannon and Stephen T. Ziliak

TABLE Bf1-7 Poor relief in Philadelphia – recipients, expenditures, and tax levied: 1709–1775

Contributed by Stephen T. Ziliak

Period	Poor relief						
	Population	Poor tax levied per annum	Expenditures	Expenditures per 1,000 population	Recipients	Recipients per 1,000 population	Expenditures per recipient
	Bf1	Bf2	Bf3	Bf4	Bf5	Bf6	Bf7
	Number	Pence	Pounds	Pounds per 1,000	Number	Per 1,000	Pounds
1709	2,500	1.5	158	59	13	4.8	12.00
1739	9,100	3.0	800	83	80 ¹	8.3 ¹	10.00 ¹
1756–1758	15,600	3.0	1,175	72	110 ¹	6.7 ¹	10.90 ¹
1765	18,100	5.0	2,385	123	310	16.0	7.14
1768–1771	19,700	6.0	3,681	175	590	28.1	6.50
1772–1775	22,300	6.0	3,868	163	720	30.3	5.70

¹ Estimate based on the known number of outrelievers plus an estimated 40 to 50 inmates in the small almshouse.

Source

Gary B. Nash, "Poverty and Poor Relief in Pre-Revolutionary Philadelphia," *William and Mary Quarterly* 33 (1976): 3–30. Table 1, p. 9.

Documentation

All values are in Philadelphia currency. The data are derived from numerous archival sources. For example, the figures for 1768 to 1775 are derived from

the annual reports of the Records of the Contributors of Relief to the Poor, Treasurer's Accounts, City Archives, Philadelphia. The figures for 1739, on the other hand, are found in the Philadelphia Poor Day Book, 1739. "Although food prices rose steeply in the 1770s, there was general stability in prices and sterling exchange rates in Philadelphia during the colonial period, so money values have not been converted to English sterling" (Nash 1976, p. 9).

Series Bf2. The source suggests that the tax was a flat tax on any assessable property.

TABLE Bf8-16 Poor relief expenditures in Boston, Philadelphia, and New York: 1700–1775

Contributed by Stephen T. Ziliak

Period	Boston			Philadelphia			New York		
	Poor relief			Poor relief			Poor relief		
	Population	Average annual expenditure	Expenditure per 1,000 population	Population	Average annual expenditure	Expenditure per 1,000 population	Population	Average annual expenditure	Expenditure per 1,000 population
	Bf8	Bf9	Bf10	Bf11	Bf12	Bf13	Bf14	Bf15	Bf16
	Number	Pounds sterling	Pounds sterling per 1,000	Number	Pounds sterling	Pounds sterling per 1,000	Number	Pounds sterling	Pounds sterling per 1,000
1700–1710	7,500	173	23	2,450	119	48	4,500	—	—
1711–1720	9,830	181	18	3,800	—	—	5,900	249	32
1721–1730	11,840	273	23	6,600	—	—	7,600	276	25
1731–1740	15,850	498	31	8,800	471	49	10,100	351	21
1741–1750	16,240	806	50	12,000	—	—	12,900	389	21
1751–1760	15,660	1,204	77	15,700	1,083	67	13,200	667	39
1761–1770	15,520	1,909	123	22,100	2,842	129	18,100	1,667	92
1771–1775	15,500	2,478	158	27,900	3,785	136	22,600	2,778	123

Source

Gary B. Nash, "Urban Wealth and Poverty in Pre-Revolutionary America," *Journal of Interdisciplinary History* 6 (4) (1976): 545–84. Table 4, p. 557.

Documentation

See the text for Table Bf1-7 for a description of the data source for Philadelphia.

Between 1754 and 1775, the town records of Boston provide, with few interruptions, an annual report of the treasurer on disbursements to the Overseers of the Poor. These reports provide direct counts. For the period 1700–1720, Nash "estimated poor relief costs at one-third the town expenses

(given yearly in Boston Town Records), the ratio that prevailed in the five years between 1727 and 1737 when poor relief expense figures are given" (Nash 1976, p. 556 n. 24).

The figures for New York have been reconstructed from the Minutes and Accounts of the Church Warden and Vestrymen of the City of New York, 1696–1715, New York Historical Society; and Minutes of the Meetings of the Justices, Church Wardens, and Vestrymen of the City of New York, 1694–1747, New York Public Library. The salary of the clergymen for the Society for the Propagation of the Gospel, which was included in these expenditures, has been subtracted from the yearly totals. Nash reports that "the New York

TABLE Bf8–16 Poor relief expenditures in Boston, Philadelphia, and New York: 1700–1775 *Continued*

records after 1747 have apparently not survived, but the level of expenditures on the eve of the Revolution was reported by the vestrymen and churchwardens in a petition to the Continental Congress in May 1776” (1976, p. 556 n. 25).

All values, which in the inventories are given in Massachusetts and Pennsylvania currency, have been converted to sterling. Nash used the conversion

figures given in U.S. Bureau of the Census, *Historical Statistics of the United States, Colonial Times to 1957* (1960), p. 773, and filled in the missing years from the price per ounce of silver cited in the inventories for these years. For Philadelphia, the yearly sterling equivalents for Pennsylvania currency are taken from Anne Bezanson, Robert D. Gray, and Marian Hussey, *Prices in Colonial Pennsylvania* (University of Pennsylvania Press, 1935), p. 431.

TABLE Bf 17–22 Tax assessments and expenditures for the poor in Philadelphia: 1800–1854¹

Contributed by Stephen T. Ziliak

Fiscal year beginning	Poor-tax assessment	Total expenditures for the poor	Almshouse expenditures		Outdoor expenditures	
			Total	Percentage of total expenditures	Total	Percentage of total expenditures
			Bf17	Bf18	Bf19 ²	Bf20
Dollars	Dollars	Dollars	Percent	Dollars	Percent	
1800	50,000	47,212	25,330 ⁴	54	21,882	46
1801	75,000	59,830	37,568 ⁴	63	22,262	37
1802	60,000	73,507	38,004 ⁴	52	35,503	48
1803	75,000	79,684	50,192	63	29,492	37
1804	70,000	91,702	55,202	60	36,500	40
1805	90,000	96,025	62,309	65	33,716	35
1806	90,000	89,795	57,942	65	31,854	35
1807	91,160	103,856	67,537	65	36,318	35
1808	90,000	113,952	79,414	70	34,537	30
1809	83,000	113,049	76,704	68	36,345	32
1810	88,000	92,203	58,154	63	34,049	37
1811	102,954	88,040	49,023	56	39,067	44
1812	102,595	—	—	—	—	—
1813	90,000	103,981	45,409	44	58,572	56
1814	100,000	120,488	64,424	53	56,064	47
1815	110,000	124,660	70,788	57	53,872	43
1816	110,000	117,892	63,222	54	54,670	46
1817	150,000	107,598	52,031	48	55,567	52
1818	135,000	116,408	48,811	42	67,596	58
1819	135,000	98,014	51,393	52	46,621	48
1820	140,000	95,010	51,501	54	43,509	46
1821	130,000	97,847	50,511	52	47,337	48
1822	105,940	111,120	59,506	54	51,530	46
1823	114,468	129,125	57,227	44	71,898	56
1824	132,317	110,020	52,423	49	55,597	51
1825	129,383	100,170	52,842	52	47,329	48
1826	89,961	119,798	70,789	59	49,009	41
1827	80,000	83,088	52,419	63	30,669	37
1828	90,000	82,154	55,190	67	26,964	33
1829	90,000	83,508	53,877	65	29,631	35
1830	80,564	86,614	54,494	63	32,120	37
1831	91,828	106,139	69,513	66	36,626	34
1832	139,891	106,252	64,814	61	41,438	39
1833	—	101,597	68,308	67	33,289	33
1835	168,942	114,092	97,720	86	16,372	14
1836	—	112,107	100,297	89	11,810	11
1837	—	130,360	114,933	88	15,427	12
1838	—	122,612	105,921	86	16,691	14
1839	169,043	111,292	84,902	76	26,390	24
1840	—	98,763	70,621	72	28,142	28
1841	—	120,035	88,910	74	31,125	26
1842	181,094	115,511	80,755	70	34,756	30
1843	178,003	113,034	79,489	70	33,546	30
1844	194,825	—	—	—	—	—

Notes appear at end of table

(continued)

TABLE Bf17–22 Tax assessments and expenditures for the poor in Philadelphia: 1800–1854 *Continued*

Fiscal year beginning	Total expenditures for the poor		Almshouse expenditures		Outdoor expenditures	
	Poor-tax assessment		Total	Percentage of total expenditures	Total	Percentage of total expenditures
	Bf17	Bf18	Bf19 ²	Bf20	Bf21	Bf22
	Dollars	Dollars	Dollars	Percent	Dollars	Percent
1845	161,025	144,074	105,245	73	38,829	27
1846	197,265	129,345	91,463	71	37,882	29
1847	191,013	144,598	106,207	73	38,391	27
1848	189,425	148,297	100,683	68	47,613	32
1849	191,037	166,346	117,759	70	48,587	30
1850	208,018	167,204	121,485	73	45,719	27
1852	259,583	176,434	120,878	69	55,557	31
1853	—	193,277	127,558	66	65,719	34
1854 ³	—	143,771	115,665	80	28,107	20

¹ Through 1802, the fiscal year began in March; thereafter in May.

² Beginning in 1821, expenditures of the children's asylum and board of youngsters in the Shelter for Colored Orphans and of the sick in the city hospital are included with the almshouse expenditures. In the annual accounts, they are included with outdoor expenditures.

³ May to December.

⁴ Almshouse figures include the amount paid the Pennsylvania Hospital for boarding some insane patients.

Source

Priscilla Clement, *Welfare and the Poor in the Nineteenth-Century City: Philadelphia, 1800–1854* (Fairleigh Dickinson University Press, 1985), Appendix 1, pp. 174–7.

Documentation

The underlying sources for the data are many and are documented in detail in Clement (1985), Appendix 1. There are some discrepancies (though apparently small in magnitude) in the year-to-year comparability of figures.

Series Bf17. The tax assessment was usually levied in January for the fiscal year that began in March or May.

Series Bf19. Expenditures are direct costs of caring for the poor in the almshouse. The figures include salaries paid to almshouse employees and the cost of materials used in the [almshouse] factory.

Series Bf21. Expenditures include sums spent for outdoor cash aid, medical attendance, and wood as well as for the amount paid in salaries to employees of the guardians of the poor.

TABLE Bf23–27 Public relief recipients in Philadelphia, by type of relief: 1800–1854¹

Contributed by Stephen T. Ziliak

Fiscal year beginning	Public relief				
	Total	Almshouses and children's asylum	Outdoor pensioners	Medical aid	Fuel aid
	Bf23	Bf24	Bf25	Bf26	Bf27
	Number	Number	Number	Number	Number
1800	1,390	788	602	—	—
1801	—	948	—	—	—
1802	—	804	—	—	—
1803	—	1,101	—	—	—
1804	—	1,196	—	—	—
1805	1,180 ²	1,270	590	—	—
1806	2,000	1,455	545	—	—
1807	—	1,406	—	—	—
1808	—	1,581	—	—	—
1809	—	1,611	—	—	—
1810	2,500	1,755	745	—	—
1811	2,106	1,796	310	—	—
1812	—	1,830	—	—	—
1813	—	1,820	—	—	—
1814	3,145	1,891	1,254	—	—
1815	3,462	2,254	1,208	—	—
1816	3,852	2,653	1,199	—	—
1817	4,082	2,843	1,239	—	—
1818	—	—	1,249	—	—
1819	5,530	4,049	1,481	—	—

Notes appear at end of table

(continued)

TABLE Bf23–27 Public relief recipients in Philadelphia, by type of relief: 1800–1854 *Continued*

Fiscal year beginning	Public relief				
	Total	Almshouses and children's asylum	Outdoor pensioners	Medical aid	Fuel aid
	Bf23	Bf24	Bf25	Bf26	Bf27
	Number	Number	Number	Number	Number
1820	5,237	3,907	1,330	—	—
1821	4,834	3,566	1,268	—	—
1822	5,119	3,897	1,222	—	—
1823	5,387	4,378	1,009	—	—
1824	4,508	3,666	842	—	—
1825	4,591	3,578	1,013	—	—
1826	5,059	4,025	1,034	—	—
1827	4,110	3,411	699	—	—
1828	4,276	4,024	252	—	—
1829	4,360	3,651	709	2,875	2,128
1830	3,450	2,730	720	—	—
1831	4,171	3,501	670	—	3,197
1832	—	—	760	2,285	3,175
1833	4,198	3,400	798	—	—
1834	—	—	916	—	—
1835	2,512	2,512	0	—	—
1836	2,692	2,692	0	—	—
1837	2,896	2,896	0	—	3,685
1838	2,420	2,420	0	—	2,742
1839	3,131	3,008	123	—	—
1840	2,891	2,696	195	—	2,889
1841	3,161	2,985	176	2,437	4,498
1842	3,060	2,869	191	3,164	7,575
1843	3,187	2,958	229	2,808	6,650
1845	3,475	3,223	252	3,077	7,040
1846	4,810	4,503	307	3,190	7,720
1847	4,520	4,303	217	2,864	6,903
1848	4,775	4,504	271	2,882	8,868
1849	5,146	4,885	261	3,491	8,821
1850	5,041	4,854	187	—	—
1851	—	6,719	—	—	—
1852	—	5,017	—	—	—
1853	—	5,407	—	—	—
1854	—	3,244	—	—	—

¹ Through 1802, the fiscal year began in March; thereafter in May.

² Total is given as reported in the source, but it does not equal the sum of series Bf24–25.

Source

Priscilla Clement, *Welfare and the Poor in the Nineteenth-Century City: Philadelphia, 1800–1854* (Fairleigh Dickinson University Press, 1985), Appendix 2, pp. 178–80.

Documentation

The underlying sources for the data are many and are documented in detail in Clement (1985), Appendix 2. There are some discrepancies (though apparently small in magnitude) in the year-to-year comparability of figures. See Clement (1985), Appendix 2, “Sources.”

Series Bf24. Almshouse and asylum figures represent total admissions; they may be somewhat inflated, then, because some people were admitted more than once in a year.

Series Bf25. Single people and heads of families. The number of children in these families is not included in these figures but may have amounted to 40 percent of those on pensions in some years.

Series Bf26–27. Numbers of medical and fuel aid recipients were given annually in most years after 1800. Many outdoor pensioners received both fuel and medical aid so there may be a great deal of overlap, which is impossible to measure because there are no extant lists of aid recipients.

TABLE Bf28-33 Pauper support, by state: 1850-1870

Contributed by Stephen T. Ziliak

State	Average pauper support			Pauper support as a ratio to income of common laborer		
	1850	1860	1870	1850	1860	1870
	Bf28	Bf29	Bf30	Bf31	Bf32	Bf33
	Dollars	Dollars	Dollars	Percent	Percent	Percent
United States	59	87	119	21.6	26.4	24.0
Alabama	56	87	119	25.7	29.1	31.6
Arkansas	103	94	139	44.2	29.1	32.2
California	—	388	276	—	41.3	38.4
Colorado	—	—	601	—	—	77.2
Connecticut	55	56	111	23.3	17.1	22.0
Delaware	65	51	91	26.7	18.8	18.8
District of Columbia	—	89	94	—	28.6	—
Florida	15	43	67	4.7	11.9	18.0
Georgia	33	38	88	14.7	13.7	26.0
Illinois	104	106	235	53.9	32.4	47.2
Indiana	99	96	110	57.9	31.5	22.7
Iowa	122	123	205	47.3	39.9	39.0
Kansas	—	20	138	—	5.3	23.7
Kentucky	74	80	90	34.4	26.5	20.8
Louisiana	— ¹	70	105	— ¹	16.2	19.8
Maine	43	49	101	18.2	15.0	21.1
Maryland	36	104	101	16.7	39.8	21.1
Massachusetts	71	89	194	27.2	28.1	39.0
Michigan	66	80	132	32.2	24.8	27.0
Minnesota	—	—	69	—	46.1	12.7
Mississippi	71	89	120	24.1	22.7	26.6
Missouri	105	90	103	45.1	29.5	22.4
Montana	—	—	742	—	—	39.8
Nebraska	—	— ²	121	—	— ²	18.3
Nevada	—	—	439	—	—	47.1
New Hampshire	72	67	110	36.7	22.9	27.2
New Jersey	59	71	119	29.2	21.3	23.3
New York	64	75	189	30.8	23.7	40.5
North Carolina	38	58	83	22.6	24.3	32.5
Ohio	57	— ³	154	32.8	— ³	30.9
Oregon	—	526	306	—	—	46.4
Pennsylvania	61	86	143	38.4	24.9	27.9
Rhode Island	66	70	154	29.5	21.4	33.0
South Carolina	40	45	109	19.5	17.6	34.7
Tennessee	53	69	75	29.4	26.4	20.9
Texas	— ²	105	105	— ²	27.0	26.6
Utah	—	344	122	—	57.0	—
Vermont	64	65	100	28.6	20.1	22.3
Virginia	34	46	92	16.8	18.3	29.3
Washington	—	935	264	—	103.0	33.9
West Virginia	—	—	81	—	—	20.5
Wisconsin	62	64	134	28.1	19.6	28.0

¹ Aggregate expenditures greater than in 1860.² Fewer than 10 persons enumerated.³ June 1 count above yearly total.**Source**

Stanley Lebergott, *The American Economy: Income, Wealth, and Want* (Princeton University Press, 1976), pp. 64-5. Notes on pp. 61-4. Data for daily wages of common labor are taken from Lebergott, *Manpower in Economic Growth* (McGraw-Hill, 1964), p. 541, and multiplied by 311 to give an annual rate (Lebergott 1976, p. 63).

Documentation

The estimates for relief payments were computed from data in *A Compendium of the Ninth Census* (U.S. Census Office, 1872, pp. 533-4). According to Lebergott, "the estimates . . . were computed . . . by dividing the count of paupers as of June 1 into the 'annual cost of support' for an entire year. The June 1 count is probably below a yearly average so far as seasonality is concerned. But the peak of immigrant flows in the spring would tend to bring it above average. Because 40 percent of the June 1 count was in New York, Pennsylvania,

and Massachusetts - centers for immigrant arrival - the importance of this latter factor is probably substantial. We therefore accept the June 1 count as a fair annual average" (Lebergott 1976, p. 61).

Lebergott's data for New York State cannot be replicated with Hannon's county-level data from New York State. The reason for the discrepancy is unresolved. L. Lynne Kiesling and Robert Margo have examined the census manuscripts for the antebellum period, 1850 and 1860. They have found that some of Lebergott's other state totals cannot be replicated by aggregating to the county-level data (L. Lynne Kiesling and Robert A. Margo, "Explaining the Rise in Antebellum Pauperism, 1850-1860: New Evidence," *Quarterly Review of Economics and Finance* 37 (2) (1997): 405-17). Margo points out (in correspondence to Ziliak) that the numerator (the pauper expenditures) and the denominator (the average wage) of Lebergott's "generosity" figure are unweighted, even in cases where census agents performed the arithmetic correctly. Margo suggests that it would be better to produce a generosity figure built up from the county-level data, and then weighted by, for example, the number of paupers in each county.

TABLE Bf34-149 Paupers enumerated in almshouses, by region and state: 1880-1923¹

Contributed by Stephen T. Ziliak

Year	Paupers enumerated											
	Total, United States	New England							Middle Atlantic			
		Total	Maine	New Hampshire	Vermont	Massachusetts	Rhode Island	Connecticut	Total	New York	New Jersey	Pennsylvania
		Bf34	Bf35	Bf36	Bf37	Bf38	Bf39	Bf40	Bf41	Bf42	Bf43	Bf44
Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	
1880	66,203	9,835	1,505	1,198	655	4,533	526	1,418	24,098	12,452	2,462	9,184
1890	73,044	9,500	1,161	1,143	543	4,725	490	1,438	21,643	10,272	2,718	8,653
1904	81,764	11,495	1,152	1,140	414	5,934	788	2,067	21,783	10,793	1,936	9,054
1910	84,198	11,886	945	991	383	6,555	768	2,244	23,772	12,031	2,135	9,606
1923	78,090	9,529	745	870	234	5,629	889	1,162	18,564	8,740	1,764	8,060

Note appears at end of table

(continued)

Year	Paupers enumerated											
	East North Central						West North Central					
	Total	Ohio	Indiana	Illinois	Michigan	Wisconsin	Total	Minnesota	Iowa	Missouri	North Dakota	South Dakota
	Bf46	Bf47	Bf48	Bf49	Bf50	Bf51	Bf52	Bf53	Bf54	Bf55	Bf56	Bf57
Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	
1880	16,474	6,974	3,052	3,684	1,746	1,018	3,337	227	1,165	1,477	—	—
1890	20,279	7,400	2,927	5,395	1,916	2,641	5,336	365	1,621	2,378	35	53
1904	21,127	8,172	3,120	5,635	2,594	1,606	6,618	547	2,019	2,465	184	159
1910	21,358	8,078	3,114	5,421	2,970	1,775	6,366	687	1,779	2,388	81	145
1923	21,405	6,872	3,128	6,415	3,262	1,728	7,298	1,032	1,711	2,712	120	171

Note appears at end of table

(continued)

Year	Paupers enumerated											
	West North Central		South Atlantic									
	Nebraska	Kansas	Total	Delaware	Maryland	District of Columbia	Virginia	West Virginia	North Carolina	South Carolina	Georgia	Florida
	Bf58	Bf59	Bf60	Bf61	Bf62	Bf63	Bf64	Bf65	Bf66	Bf67	Bf68	Bf69
Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	
1880	113	355	6,975	387	1,187	184	2,117	711	1,275	519	550	45
1890	291	593	8,100	299	1,599	221	2,193	792	1,483	578	901	24
1904	464	780	8,298	278	1,633	230	1,915	881	1,519	686	1,032	124
1910	551	735	7,706	366	1,681	276	1,688	808	1,389	478	813	207
1923	573	979	6,875	277	1,368	313	1,211	702	1,474	451	872	207

Note appears at end of table

(continued)

Year	Paupers enumerated											
	East South Central					West South Central					Mountain	
	Total	Kentucky	Tennessee	Alabama	Mississippi	Total	Arkansas	Louisiana	Oklahoma	Texas	Total	Montana
	Bf70	Bf71	Bf72	Bf73	Bf74	Bf75	Bf76	Bf77	Bf78	Bf79	Bf80	Bf81
Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	
1880	3,361	1,366	1,136	514	345	315	105	—	—	210	152	—
1890	4,240	1,578	1,545	623	494	809	223	122	—	464	367	132
1904	4,768	1,678	1,812	761	517	1,689	575	149	52	913	1,283	314
1910	4,266	1,522	1,569	739	436	1,630	534	187	48	861	1,652	415
1923	4,097	1,457	1,477	768	395	2,075	578	174	250	1,073	1,778	324

Note appears at end of table

(continued)

TABLE Bf34-149 Paupers enumerated in almshouses, by region and state: 1880-1923 *Continued*

Year	Paupers enumerated									
	Mountain						Pacific			
	Idaho	Wyoming	Colorado	Arizona	Utah	Nevada	Total	Washington	Oregon	California
	Bf82	Bf83	Bf84	Bf85	Bf86	Bf87	Bf88	Bf89	Bf90	Bf91
Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	
1880	7	—	46	4	—	95	1,656	11	51	1,594
1890	20	—	87	23	62	43	2,770	71	99	2,600
1904	70	—	398	146	184	171	4,703	306	257	4,140
1910	97	19	510	271	181	159	5,562	564	352	4,646
1923	193	62	667	206	188	138	6,469	769	580	5,120

Note appears at end of table

(continued)

Year	Paupers enumerated per 100,000 population											
	New England							Middle Atlantic				
	Total, United States	Total	Maine	New Hampshire	Vermont	Massachusetts	Rhode Island	Connecticut	Total	New York	New Jersey	Pennsylvania
	Bf92	Bf93	Bf94	Bf95	Bf96	Bf97	Bf98	Bf99	Bf100	Bf101	Bf102	Bf103
Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	
1880	132.0	245.2	231.9	345.3	197.1	254.2	190.2	227.7	229.6	245.0	217.7	214.4
1890	116.5	202.1	175.6	303.6	163.3	211.0	141.8	192.7	170.4	171.3	188.1	164.6
1904	100.0	193.5	161.8	272.4	118.9	197.2	167.7	210.2	129.2	136.0	91.3	133.2
1910	91.5	181.4	127.3	230.2	107.6	194.7	141.5	201.3	123.1	132.0	84.1	125.3
1923	71.5	125.1	96.2	194.9	66.4	141.5	143.3	80.2	80.6	81.6	53.2	89.6

Note appears at end of table

(continued)

Year	Paupers enumerated per 100,000 population											
	East North Central						West North Central					
	Total	Ohio	Indiana	Illinois	Michigan	Wisconsin	Total	Minnesota	Iowa	Missouri	North Dakota	South Dakota
	Bf104	Bf105	Bf106	Bf107	Bf108	Bf109	Bf110	Bf111	Bf112	Bf113	Bf114	Bf115
Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	
1880	147.0	218.1	154.3	119.7	106.7	77.4	54.2	29.1	71.7	68.1	—	—
1890	150.5	201.5	133.5	141.0	91.5	156.6	60.0	28.0	84.8	88.8	19.2	16.1
1904	125.7	186.6	120.8	110.1	101.2	74.2	61.2	29.3	90.6	77.7	44.6	34.0
1910	117.0	169.5	115.3	96.1	105.7	76.1	54.7	33.1	80.0	72.5	14.0	24.8
1923	96.0	114.2	104.6	95.7	83.9	63.8	57.1	41.8	69.8	79.0	18.0	26.3

Note appears at end of table

(continued)

Year	Paupers enumerated per 100,000 population											
	West North Central			South Atlantic								
	Nebraska	Kansas	Total	Delaware	Maryland	District of Columbia	Virginia	West Virginia	North Carolina	South Carolina	Georgia	Florida
	Bf116	Bf117	Bf118	Bf119	Bf120	Bf121	Bf122	Bf123	Bf124	Bf125	Bf126	Bf127
Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	
1880	25.0	35.6	91.8	264.0	127.0	103.6	140.0	115.0	91.1	52.1	35.7	16.7
1890	27.5	41.6	91.4	177.5	153.4	95.9	132.4	103.8	92.3	50.2	49.0	6.1
1904	41.7	50.3	74.9	145.5	138.1	77.3	99.3	83.6	75.7	48.9	43.7	20.3
1910	46.2	43.5	63.2	180.9	129.8	83.4	81.9	66.2	63.0	31.5	31.2	27.5
1923	43.3	54.7	47.6	121.3	91.8	71.5	51.0	46.0	55.6	26.1	29.4	20.2

Note appears at end of table

(continued)

TABLE Bf34-149 Paupers enumerated in almshouses, by region and state: 1880-1923 *Continued*

Year	Paupers enumerated per 100,000 population									
	East South Central					West South Central				
	Total	Kentucky	Tennessee	Alabama	Mississippi	Total	Arkansas	Louisiana	Oklahoma	Texas
	Bf128	Bf129	Bf130	Bf131	Bf132	Bf133	Bf134	Bf135	Bf136	Bf137
Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	
1880	60.2	82.9	73.7	40.7	30.5	9.4	13.1	—	—	13.2
1890	66.0	84.9	87.4	41.2	88.3	17.8	19.8	10.9	—	20.8
1904	60.7	76.3	87.1	39.2	31.5	23.0	40.9	10.0	4.7	27.2
1910	50.7	66.5	71.8	34.6	24.3	18.6	33.9	11.3	2.9	22.1
1923	45.4	59.5	62.1	32.0	22.1	19.5	32.1	9.5	11.8	22.1

Note appears at end of table

(continued)

Year	Paupers enumerated per 100,000 population											
	Mountain						Pacific					
	Total	Montana	Idaho	Wyoming	Colorado	Arizona	Utah	Nevada	Total	Washington	Oregon	California
	Bf138	Bf139	Bf140	Bf141	Bf142	Bf143	Bf144	Bf145	Bf146	Bf147	Bf148	Bf149
Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	Per 100,000	
1880	23.3	—	21.5	—	23.7	9.9	—	152.6	148.6	14.6	29.2	184.3
1890	31.7	99.9	23.7	—	21.1	38.6	29.8	94.0	148.0	20.3	31.6	215.2
1904	63.4	107.7	31.6	—	62.8	95.8	59.0	301.7	153.6	41.1	50.6	228.9
1910	62.7	110.4	29.8	13	63.8	132.6	48.5	194.2	132.7	49.4	52.3	195.4
1923	50.6	54.6	42.0	30	68.4	56.0	40.1	178.3	109.3	54.5	71.4	138.5

¹ Enumeration date June 1 through 1890; January 1 thereafter.

Source

Paupers in Almshouses: 1923 (U.S. Government Printing Office, 1926), Table 4, p. 7. Notes for Table 4 appear in the report on pp. 1-5, 7.

Documentation

The data report the number of paupers in public almshouses only. The data do not report the number of paupers receiving relief in their own homes—those receiving “outdoor relief” – and they do not include the number of paupers residing in privately financed almshouses or asylums. Therefore, the data cannot be used as the only indicator of the extent of pauperism.

A great store of statistical data on indoor institutions – almshouses, poorhouses, workhouses, insane asylums, and houses of refuge – can be found in the annual reports of the (variously named) State Boards of Charities and Corrections, and in the county-level reports that comprise them. One may also find state and national information on the laws and practices of public assistance in the annual *Proceedings of the National Conference of Charities and Corrections*.

Although the word “pauper” slid away from American vocabularies for most of the twentieth century, the Bureau of the Census used the term during the first quarter of the twentieth century to categorize anyone who received public assistance. Prior to 1923, the Bureau of the Census took seven different censuses relating to paupers. A census of paupers was taken as a part of each decennial census from 1850 to 1880, while for 1904, 1910, and again for 1923, a special census of paupers in public almshouses was taken. The

Bureau defined a public almshouse as an institution supported or controlled by town, municipal, county, or state authorities and used for the shelter of persons who are without means of self-support and who have no relatives able and willing or legally bound to aid them. The censuses of 1904, 1910, and 1923 included all public almshouses in the United States. The enumerations were made chiefly by officials of the institutions and covered not only the paupers who were inmates of almshouses on a given date but also those admitted in the course of one year and those who were discharged or transferred, or who died during one year.

No almshouse was maintained in New Mexico in the years covered by this table.

For a quantitative analysis of these pauper census data, see Stephen T. Ziliak, “By Foot, by Ford, by Horse, by Hearse: In and Out of America’s Almshouses, 1880-1923” (unpublished paper, Department of Economics, Bowling Green State University). A quantitative analysis of poorhouses in New York State may be found in Joan Underhill Hannon, “Shutting Down Welfare: Two Cases From America’s Past,” *Quarterly Review of Economics and Finance* 37 (2) (1997): 419-38; Joan Underhill Hannon, “Poor Relief Policy in Antebellum New York State: The Rise and Decline of the Poorhouse,” *Explorations in Economic History* 22 (1985): 233-56; and Joan Underhill Hannon, “Poverty and the Antebellum Northeast: The View from New York State’s Poor Relief Rolls,” *Journal of Economic History* 44 (4) (1984): 1007-32. For a general introduction to the history of the almshouse, see David J. Rothman, *The Discovery of the Asylum* (Little, Brown, 1971), and Michael B. Katz, *In the Shadow of the Poorhouse* (Basic Books, 1986).

TABLE Bf150–155 Paupers admitted to almshouses, by region and state: 1904–1922

Contributed by Stephen T. Ziliak

Region and state	Paupers admitted			Paupers per 100,000 population		
	1904	1910	1922	1904	1910	1922
	Bf150	Bf151	Bf152	Bf153	Bf154	Bf155
	Number	Number	Number	Per 100,000	Per 100,000	Per 100,000
United States	81,412	88,313	63,807	99.5	96.0	58.4
New England	12,990	14,716	10,036	218.7	224.6	131.7
Maine	828	860	839	116.3	115.8	108.3
New Hampshire	646	812	830	154.4	188.6	186.0
Vermont	231	269	215	66.4	75.6	61.0
Massachusetts	8,398	9,520	6,481	279.1	282.8	162.9
Rhode Island	551	526	419	117.2	96.9	67.5
Connecticut	2,336	2,729	1,252	237.6	244.8	86.4
Middle Atlantic	23,400	23,927	14,250	138.8	123.9	61.9
New York	12,073	12,724	6,043	152.1	139.6	56.4
New Jersey	1,589	1,736	1,116	74.9	68.4	33.7
Pennsylvania	9,738	9,467	7,093	143.3	123.5	78.9
East North Central	16,901	17,116	15,604	100.6	93.8	70.0
Ohio	7,091	5,825	4,150	161.9	122.2	69.0
Indiana	1,800	1,741	1,739	69.7	64.5	58.2
Illinois	4,446	5,590	5,949	86.9	99.1	88.7
Michigan	2,476	2,783	2,944	96.5	99.0	75.7
Wisconsin	1,092	1,177	822	50.4	50.4	30.3
West North Central	3,578	4,585	4,137	33.1	39.4	32.4
Minnesota	517	815	563	27.7	39.3	22.8
Iowa	896	823	766	40.2	37.0	31.3
Missouri	1,123	1,151	1,124	35.4	34.9	32.7
North Dakota	163	114	86	39.5	19.8	12.9
South Dakota	150	160	138	32.1	27.4	21.2
Nebraska	174	1,101	1,009	15.6	92.3	76.3
Kansas	555	421	451	35.8	24.9	25.2
South Atlantic	7,227	7,945	6,396	65.2	65.2	44.3
Delaware	183	430	283	95.8	212.5	123.9
Maryland	1,617	1,949	1,845	131.8	150.5	123.9
District of Columbia	148	171	155	49.7	51.7	35.4
Virginia	2,159	2,404	1,211	111.9	116.6	51.0
West Virginia	719	531	495	68.2	43.5	32.4
North Carolina	863	728	801	43.0	33.0	30.2
South Carolina	432	285	254	30.8	18.8	14.7
Georgia	726	514	511	30.8	19.7	17.2
Florida	380	933	841	62.3	124.0	82.1
East South Central	3,448	3,086	2,128	43.9	36.7	23.6
Kentucky	1,013	1,133	666	46.1	49.5	27.2
Tennessee	1,460	1,227	785	70.2	56.2	33.0
Alabama	748	481	520	38.5	22.5	21.6
Mississippi	227	245	157	13.8	13.6	8.8
West South Central	2,045	2,068	1,723	27.8	23.5	16.2
Arkansas	982	849	728	69.8	53.9	40.5
Louisiana	75	112	50	5.1	6.8	2.7
Oklahoma	87	61	229	7.9	3.7	10.8
Texas	901	1,046	716	26.8	26.8	14.7
Mountain	2,528	3,505	2,375	125.0	133.1	67.5
Montana	759	926	473	260.4	246.2	79.9
Idaho	168	177	148	75.9	54.4	32.2
Wyoming	—	53	44	—	36.3	21.3
Colorado	694	697	905	109.5	87.2	92.7
Arizona	436	1,015	527	285.9	496.7	143.4
Utah	124	181	111	39.8	48.5	23.7
Nevada	347	456	167	612.2	556.9	215.7
Pacific	9,295	11,365	7,158	303.7	271.1	120.9
Washington	420	1,247	566	56.4	109.2	40.1
Oregon	545	504	465	107.4	74.9	57.3
California	8,330	9,614	6,127	460.5	404.4	165.7

Source

Paupers in Almshouses: 1923 (U.S. Government Printing Office, 1926), Table 5, p. 8. Notes: pp. 1–5, 8.

Documentation

See the text for Table Bf34–149.

No almshouse was maintained in New Mexico in the years covered by this table, nor in Wyoming in 1904.

TABLE Bf156-175 Local public poor relief expenditures and the value of pauper labor in New York State and New York City, by type of relief: 1840-1895

Contributed by Joan Underhill Hannon

Year	New York State						New York City						
	Local public expenditures						Local public expenditures						
	Public relief - including or excluding poorhouse repairs and improvements			Connected with county and city poorhouses - including or excluding poorhouse repairs and improvements			Value of pauper labor in city and county poorhouses	Public relief - including or excluding poorhouse repairs and improvements			Connected with city poorhouse - including or excluding poorhouse repairs and improvements		Value of pauper labor in city poorhouse
	Including	Excluding	Temporary outdoor relief	Including	Excluding	Including		Excluding	Temporary outdoor relief	Including	Excluding		
	Bf156	Bf157	Bf158	Bf159	Bf160	Bf161	Bf162	Bf163	Bf164	Bf165	Bf166	Bf167	
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars		
1840	—	493,596	146,315	—	347,281	—	—	188,683	28,019	—	160,664	—	
1841	—	508,214	150,205	—	358,009	55,211	—	195,997	24,060	—	171,937	27,551	
1842	—	485,793	163,128	—	322,665	32,611	—	170,188	26,894	—	143,294	2,979	
1843	—	558,741	240,205	—	318,536	58,895	—	192,908	55,748	—	137,160	26,983	
1844	—	537,932	214,268	—	323,664	37,754	—	205,143	50,859	—	154,284	6,000	
1846	—	538,133	225,131	—	313,002	—	—	205,604	65,134	—	140,470	—	
1847	—	674,843	257,662	—	417,181	—	—	312,113	96,019	—	216,094	—	
1848	—	—	—	—	—	—	—	—	—	—	—	—	
1849	—	797,985	331,328	—	466,657	—	—	308,508	91,074	—	217,434	—	
1850	—	691,064	295,730	—	395,334	—	—	231,986	76,255	—	155,731	—	
1851	—	786,755	340,358	—	446,397	—	—	264,329	71,904	—	192,425	—	
1852	—	939,731	409,814	—	529,917	—	—	304,465	91,189	—	213,276	—	
1853	—	930,974	345,765	—	585,209	—	—	296,286	82,136	—	214,150	—	
1854	—	1,057,923	380,100	—	677,823	—	—	346,828	83,705	—	263,123	—	
1855	—	1,316,048	504,484	—	811,564	—	—	444,925	121,861	—	323,064	—	
1856	—	1,315,805	455,812	—	859,993	—	—	442,509	95,522	—	346,987	—	
1857	—	1,218,034	443,383	—	774,651	—	—	428,457	108,756	—	319,701	—	
1858	—	1,425,269	625,002	—	800,267	—	—	490,883	139,731	—	351,152	—	
1859	—	1,297,699	586,511	—	711,188	—	—	436,434	111,702	—	324,732	—	
1860	—	1,286,701	524,551	—	762,150	—	—	474,529	88,833	—	385,696	—	
1861	—	1,284,032	485,189	—	798,843	—	—	463,930	69,162	—	394,768	—	
1862	—	1,187,152	475,687	—	711,465	—	—	404,431	94,718	—	309,713	—	
1863	—	1,382,044	551,711	—	830,333	—	—	439,056	83,751	—	355,305	—	
1864	—	1,803,757	682,086	—	1,121,671	—	—	497,556	99,630	—	397,926	—	
1865	—	2,252,606	761,087	—	1,491,519	—	—	741,568	104,803	—	636,765	—	
1866	—	2,205,268	740,727	—	1,464,541	—	—	701,279	90,529	—	610,750	—	
1867	—	2,306,709	759,840	—	1,546,869	—	—	669,555	70,441	—	599,114	—	
1868	—	2,472,286	888,874	—	1,583,412	—	—	777,479	135,858	—	641,621	—	
1869	—	2,326,951	866,583	—	1,460,368	—	—	717,219	128,385	—	588,834	—	
1870	2,625,349	2,415,785	916,809	1,708,540	1,498,976	—	814,463	740,551	126,360	688,103	614,191	—	
1871	2,337,853	2,180,068	716,487	1,621,366	1,463,581	—	814,719	752,104	123,732	690,987	628,372	—	
1872	2,266,649	2,163,015	747,159	1,519,490	1,415,856	—	823,021	772,735	104,051	718,970	668,684	—	
1873	2,580,806	2,503,373	841,958	1,738,848	1,661,415	—	877,649	828,689	104,165	773,484	724,524	—	
1874	2,648,146	2,525,039	1,021,946	1,626,200	1,503,093	—	790,103	777,283	102,102	688,001	675,181	—	
1875	2,643,908	2,502,904	944,671	1,699,237	1,558,233	—	833,363	756,396	95,521	737,842	660,875	—	
1876	2,563,607	2,499,267	931,877	1,631,730	1,567,390	—	786,877	759,253	74,395	712,482	684,858	—	
1877	2,737,795	2,643,362	1,095,231	1,642,564	1,548,131	—	799,425	771,545	83,248	716,177	688,297	—	
1878	2,519,429	2,414,610	938,450	1,580,979	1,476,160	—	755,705	732,515	59,430	696,275	673,085	—	
1879	2,403,342	2,312,033	788,766	1,614,576	1,523,267	—	827,537	801,775	59,909	767,628	741,866	—	
1880	2,301,816	1,958,742	743,258	1,558,558	1,215,484	—	854,305	841,993	58,701	795,604	783,292	—	
1881	—	—	—	—	—	—	—	—	—	—	—	—	
1882	—	—	—	—	—	—	—	—	—	—	—	—	
1883	2,659,290	2,538,165	636,917	2,022,373	1,901,248	—	1,070,320	1,010,270	57,488	1,012,832	952,782	—	
1884	2,568,653	2,460,920	651,305	1,917,348	1,809,615	—	949,304	910,364	38,995	910,309	871,369	—	
1885	2,644,120	2,543,007	732,514	1,911,606	1,810,493	—	930,833	894,038	63,100	867,733	830,938	—	
1886	2,946,429	2,832,239	811,687	2,134,742	2,020,552	—	1,175,382	1,118,882	74,699	1,100,683	1,044,183	—	
1887	2,909,244	2,849,956	734,071	2,175,173	2,115,885	—	1,164,713	1,164,713	69,365	1,095,348	1,095,348	—	
1888	3,797,968	3,731,889	756,010	3,041,958	2,975,879	—	1,898,611	1,898,611	62,030	1,836,581	1,836,581	—	
1889	3,801,615	3,432,340	742,389	3,059,226	2,689,951	—	1,802,663	1,502,432	61,975	1,740,688	1,440,457	—	
1890	3,036,717	2,898,174	710,886	2,325,831	2,187,288	—	1,635,127	1,537,027	40,000	1,595,127	1,497,027	—	
1891	3,627,996	3,368,216	710,476	2,917,520	2,657,740	—	1,571,390	1,396,663	39,940	1,531,450	1,356,723	—	
1892	3,147,063	3,045,502	663,369	2,483,694	2,382,133	—	1,121,724	1,094,474	40,000	1,081,724	1,054,474	—	
1893	3,857,476	3,657,874	671,698	3,185,778	2,986,176	—	1,790,188	1,760,488	40,000	1,750,188	1,720,488	—	
1894	3,939,240	3,784,940	758,488	3,180,752	3,026,452	—	1,828,102	1,805,957	82,500	1,745,602	1,723,457	—	
1895	3,839,829	3,739,783	743,654	3,096,175	2,996,129	—	1,814,875	1,794,675	60,000	1,754,875	1,734,675	—	

(continued)

TABLE Bf156-175 Local public poor relief expenditures and the value of pauper labor in New York State and New York City, by type of relief: 1840-1895 *Continued*

Year	New York State, excluding New York City						Population of counties covered by public poor relief data		
	Local public expenditures						Value of pauper labor in city and county poorhouses	New York State	New York State, excluding New York City
	Public relief - including or excluding poorhouse repairs and improvements			Connected with county and city poorhouses - including or excluding poorhouse repairs and improvements					
	Including	Excluding	Temporary outdoor relief	Including	Excluding				
	Bf168	Bf169	Bf170	Bf171	Bf172	Bf173	Bf174	Bf175	
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Number	Number		
1840	—	304,913	118,296	—	186,617	28,500	2,210,040	1,897,330	
1841	—	312,217	126,145	—	186,072	27,660	2,264,902	1,941,278	
1842	—	315,605	136,234	—	179,371	29,632	2,284,270	1,949,352	
1843	—	365,833	184,457	—	181,376	31,912	2,375,145	2,028,538	
1844	—	332,789	163,409	—	169,380	31,754	2,256,578	1,897,874	
1846	—	332,529	159,997	—	172,532	35,075	2,552,473	2,156,048	
1847	—	362,730	161,643	—	201,087	25,951	2,672,359	2,249,020	
1848	—	360,124	177,103	—	183,021	32,046	—	2,027,248	
1849	—	489,477	240,254	—	249,223	31,155	2,837,114	2,354,345	
1850	—	459,078	219,475	—	239,603	36,277	2,764,045	2,248,498	
1851	—	522,426	268,454	—	253,972	32,590	2,777,283	2,240,660	
1852	—	635,266	318,625	—	316,641	39,272	2,900,492	2,341,931	
1853	—	634,688	263,629	—	371,059	30,115	2,781,408	2,200,012	
1854	—	711,095	296,395	—	414,700	26,647	2,920,427	2,315,263	
1855	—	871,123	382,623	—	488,500	24,382	3,056,005	2,426,101	
1856	—	873,296	360,290	—	513,006	27,305	3,142,345	2,479,352	
1857	—	789,577	334,627	—	454,950	22,920	2,966,809	2,268,988	
1858	—	934,386	485,271	—	449,115	24,953	3,283,127	2,548,650	
1859	—	861,265	474,809	—	386,456	28,223	3,418,462	2,645,402	
1860	—	812,172	435,718	—	376,454	38,448	3,313,667	2,499,998	
1861	—	820,102	416,027	—	404,075	23,766	3,283,893	2,488,482	
1862	—	782,721	380,969	—	401,752	26,667	3,175,676	2,398,113	
1863	—	942,988	467,960	—	475,028	40,264	3,323,461	2,563,346	
1864	—	1,306,201	582,456	—	723,745	33,170	3,469,725	2,726,666	
1865	—	1,511,038	656,284	—	854,754	27,495	3,424,714	2,698,328	
1866	—	1,503,989	650,198	—	853,791	29,105	3,358,869	2,593,676	
1867	—	1,637,154	689,399	—	947,755	31,555	3,698,820	2,892,746	
1868	—	1,694,807	753,016	—	941,791	36,041	3,578,741	2,729,603	
1869	—	1,609,732	738,198	—	871,534	25,849	3,666,146	2,771,643	
1870	1,810,886	1,675,235	790,449	1,020,437	884,786	32,537	3,978,362	3,036,070	
1871	1,523,134	1,427,963	592,755	930,379	835,208	27,526	3,841,832	2,880,414	
1872	1,443,628	1,390,280	643,108	800,520	747,172	30,247	3,861,122	2,880,189	
1873	1,703,157	1,674,684	737,793	965,364	936,891	33,255	4,216,052	3,215,209	
1874	1,858,043	1,747,757	919,844	938,199	827,913	37,345	4,086,236	3,065,077	
1875	1,810,545	1,746,508	849,150	961,395	897,358	32,537	4,336,503	3,294,617	
1876	1,776,730	1,740,014	857,482	919,248	882,532	27,526	4,525,032	3,452,162	
1877	1,938,370	1,871,817	1,011,983	926,387	859,834	30,247	4,479,337	3,374,601	
1878	1,763,724	1,682,095	879,020	884,704	803,075	33,255	4,584,337	3,446,707	
1879	1,575,805	1,510,257	728,857	846,948	781,400	37,345	4,617,888	3,446,427	
1880	1,447,511	1,116,749	684,557	762,954	432,192	73,622	4,413,530	3,207,231	
1881	1,208,520	1,088,071	669,639	538,881	418,432	42,410	2,634,505	2,634,505	
1882	1,259,676	1,214,267	609,479	650,197	604,788	34,507	2,951,550	2,951,550	
1883	1,588,970	1,527,895	579,429	1,009,541	948,466	63,106	6,495,255	5,203,536	
1884	1,619,349	1,550,556	612,310	1,007,039	938,246	73,934	4,888,560	3,567,044	
1885	1,713,287	1,648,970	669,414	1,043,873	979,556	85,462	4,992,472	3,640,471	
1886	1,771,047	1,713,357	736,988	1,034,059	976,369	86,460	5,049,364	3,666,176	
1887	1,744,531	1,685,243	664,706	1,079,825	1,020,537	101,928	5,273,216	3,858,121	
1888	1,899,357	1,833,278	693,980	1,205,377	1,139,298	97,557	5,477,201	4,029,463	
1889	1,998,952	1,929,908	680,414	1,318,538	1,249,494	98,822	5,526,731	4,045,596	
1890	1,401,590	1,361,147	670,886	730,704	690,261	66,987	4,799,547	3,284,246	
1891	2,056,606	1,971,553	670,536	1,386,070	1,301,017	93,603	5,515,215	3,953,373	
1892	2,025,339	1,951,028	623,369	1,401,970	1,327,659	124,636	5,674,781	4,064,968	
1893	2,067,288	1,897,386	631,698	1,435,590	1,265,688	80,255	5,791,579	4,132,323	
1894	2,111,138	1,978,983	675,988	1,435,150	1,302,995	104,187	5,951,105	4,240,886	
1895	2,024,954	1,945,108	683,654	1,341,300	1,261,454	97,535	5,883,048	4,120,301	

(continued)

TABLE Bf156–175 Local public poor relief expenditures and the value of pauper labor in New York State and New York City, by type of relief: 1840–1895 *Continued*

Sources

Previously unpublished data compiled from the following sources: New York Secretary of State, *Annual Reports of the Secretary of State in Relation to the Statistics of the Poor, 1831–1896*, in New York State Legislature, Assembly, *Assembly Documents 1831*, volume 1, number 66; 1832, volume 1, number 33; 1833, volume 2, number 38; 1834, volume 3, number 173; 1835, volume 3, number 185; 1836, volume 2, number 72; 1837, volume 3, number 270; 1838, volume 6, number 311; 1839, volume 3, number 146; 1840, volume 8, number 332; 1841, volume 7, number 227; 1842, volume 5, number 121; 1843, volume 2, number 38; 1845, volume 5, number 197; 1850, volume 6, number 169; 1851, volume 5, number 147; 1853, volume 6, number 120; 1854, volume 4, number 144; 1856, volume 5, number 214; 1858, volume 1, number 10; 1859, volume 3, number 101; 1860, volume 2, number 71; 1861, volume 2, number 60; 1863, volume 8, number 230; 1864, volume 8, number 198; 1865, volume 7, number 147; 1866, volume 7, number 165; 1867, volume 7, number 145; 1868, volume 9, number 88; 1869, volume 6, number 79; 1870, volume 6, number 124; 1871, volume 3, number 46; 1872, volume 3, number 48; 1873, volume 3, number 32; 1877, volume 9, number 142; 1880, volume 3, number 62; 1881, volume 4, number 64; 1882, volume 2, number 34; 1884, volume 5, number 59; 1885, volume 5, number 45; 1886, volume 3, number 45; 1887, volume 7, number 46; 1890, volume 10, number 58; 1891, volume 12, number 60; 1892, volume 6, number 43; 1893, volume 10, number 58; 1894, volume 10, number 72; 1895, volume 13, number 74; 1896, volume 18, number 84; and New York State Legislature, Senate, *Senate Documents, 1844*, volume 2, number 73; 1847, volume 3, number 100; 1848, volume 3, number 79; 1849, volume 3, number 83; 1855, volume 3, number 72; 1857, volume 4, number 131; 1862, volume 4, number 65; 1874, volume 4, number 62; 1875, volume 4, number 52; 1876, volume 3, number 46; 1878, volume 2, number 28; 1879, volume 2, number 34; 1883, volume 2, number 25; 1888, volume 5, number 44; and 1889, volume 6, number 40.

Documentation

See the essay in this chapter on public assistance, colonial times to the 1920s, for additional information on public relief in New York.

Five-year averages of real public relief expenditures per recipient and per capita appear in Joan Underhill Hannon, “Shutting Down Welfare: Two Cases from America’s Past,” *Quarterly Review of Economics and Finance* 37 (2) (1997): 419–38. Data reported here reflect minor revisions and corrections to the real relief expenditures per capita and per recipient and the poorhouse expenditures as a share of total reported as five-year averages by region for the period 1835–1859 in Joan Underhill Hannon, “Poor Relief Policy in Antebellum New York State: The Rise and Decline of the Poorhouse,” *Explorations in Economic History* 22 (Academic Press, 1985), pp. 233–56, and in Joan Underhill Hannon, “The Generosity of Antebellum Poor Relief,” *Journal of Economic History* 44 (3) (1984): 810–21.

Over the second half of the nineteenth century, state law gradually transferred some categories of relief recipients out of the system covered by the series on local relief expenditures. Most significantly, an 1865 act required the removal of insane paupers from poorhouses to state asylums, and an 1875 act mandated the removal of children from poorhouses to orphanages or other charitable institutions. Though local governments paid for the support of the insane and children in these institutions, these expenditures are not included in the data on local public relief expenditures,

series Bf156–173. Some evidence on their magnitude is reported in Hannon (1997).

Tables B and C in each *Annual Report* from 1840 to 1895 provide the data on expenses connected with county poorhouses and expenses of administering temporary relief in total and for various subcomponents by county and for the whole state. The reported state totals are not used here for several reasons. First, each year some counties failed to report on some or all expenditure categories; the published state totals simply treat such missing data as zeros. Second, to have series on expenditures that cover the same counties each year as the data on recipients, series Bf176–187, counties that failed to report or reported internally inconsistent data on recipients were eliminated. The public relief expenditure data, series Bf156–173, and the public relief recipient data, series Bf176–187, cover the same set of counties for which consistent and complete data were available in any given year, but the included counties vary slightly from year to year. In no year do the covered counties represent less than 80 percent of the state’s non-New York City population; but year-to-year fluctuations in the level of expenditures may reflect changes in county coverage, and per capita figures should not be calculated using total state population in the denominator. For this purpose, series Bf174–175 provide the population of counties covered by public poor relief data for New York State and for the state excluding New York City, assuming constant exponential population growth in each county between census years.

Prior to 1870, the reported subcomponents of poorhouse expenditures are payments to superintendents of the poor, payments to keepers and poorhouse officers, payments to constables and other officers, payments for supplies for the county poorhouse, payments for transportation of paupers, payments to physicians for attendance and medicine, and miscellaneous expenses connected with the poorhouse. The total of these components is included in the series on poorhouse expenditures excluding repairs and improvements of buildings and grounds, series Bf160, Bf166, and Bf172. In 1870, an additional category, expenditures for repairs and improvements of buildings and grounds, appears, providing the basis for the series on poorhouse expenditures including repairs and improvements of buildings and grounds, series Bf159, Bf165, and Bf171.

Series including or excluding poorhouse repairs and improvements refer to expenditures for both poorhouse buildings and grounds.

Series Bf156–157, Bf162–163, and Bf168–169. The series on total expenditures including and excluding repairs and improvements are the sum of the poorhouse and temporary outdoor relief columns. The data on expenditure subcomponents are used to divide both poorhouse and outdoor relief expenditures between administrative and direct relief costs in Hannon (1997).

Series Bf158 and Bf164–165. The subcomponents included in the series on expenditures for temporary outdoor relief are payments to overseers of the poor for their services, payments to justices of the peace for their services, and payments for relieving indigent persons temporarily not included in the two foregoing.

Series Bf161, Bf167, and Bf173. Many county poorhouses maintained farms on which residents worked. Pauper labor was also used in the daily operations of the poorhouse; and picking oakum, breaking stones, or chopping wood were common winter tasks. The series on the value of pauper labor in the poorhouse are from Table D of each year’s *Annual Report on Statistics of the Poor*.

TABLE Bf176-187 Local public relief recipients in New York State and New York City, by type of relief: 1840-1895

Contributed by Joan Underhill Hannon

Year	New York State			New York City				New York State, excluding New York City			Population of counties covered by public poor relief data	
	Persons relieved or supported	Persons receiving temporary outdoor relief	Persons supported in county and city poorhouses	Persons relieved or supported	Persons receiving temporary outdoor relief	Families receiving temporary outdoor relief	Persons supported in city poorhouse	Persons relieved or supported	Persons receiving temporary outdoor relief	Persons supported in county and city poorhouses	New York State	New York State, excluding New York City
	Bf176	Bf177	Bf178	Bf179	Bf180	Bf181	Bf182	Bf183	Bf184	Bf185	Bf186	Bf187
1840	57,935	36,843	21,092	27,553	19,690	—	7,863	30,382	17,153	13,229	2,210,040	1,897,330
1841	62,230	41,679	20,551	28,221	20,461	—	7,760	34,009	21,218	12,791	2,264,902	1,941,278
1842	60,314	39,745	20,569	29,951	21,960	—	7,991	30,363	17,785	12,578	2,284,270	1,949,352
1843	84,667	62,512	22,155	40,765	32,777	—	7,988	43,902	29,735	14,167	2,375,145	2,028,538
1844	99,582	78,546	21,036	61,163	52,920	—	8,243	38,419	25,626	12,793	2,256,578	1,897,874
1846	99,432	73,047	26,385	58,049	45,272	—	12,777	41,383	27,775	13,608	2,552,473	2,156,048
1847	105,525	74,486	31,039	54,647	40,000	—	14,647	50,878	34,486	16,392	2,672,359	2,249,020
1848	—	—	—	—	—	—	—	54,291	39,179	15,112	—	2,027,248
1849	101,201	66,408	34,793	31,770	18,066	—	13,704	69,431	48,342	21,089	2,837,114	2,354,345
1850	114,840	84,089	30,751	50,251	38,054	—	12,197	64,589	46,035	18,554	2,764,045	2,248,498
1851	122,505	87,855	34,650	56,526	41,140	—	15,386	65,979	46,715	19,264	2,777,283	2,240,660
1852	153,466	113,265	40,201	61,416	46,634	—	14,782	92,050	66,631	25,419	2,900,492	2,341,931
1853	128,831	94,798	34,033	55,823	41,622	—	14,201	73,008	53,176	19,832	2,781,408	2,200,012
1854	135,979	97,613	38,366	58,183	42,136	—	16,047	77,796	55,477	22,319	2,920,427	2,315,263
1855	198,600	160,571	38,029	101,166	85,136	—	16,030	97,434	75,435	21,999	3,056,005	2,426,101
1856	177,766	142,177	35,589	91,225	75,861	—	15,364	86,541	66,316	20,225	3,142,345	2,479,352
1857	171,794	136,035	35,759	91,660	73,811	—	17,849	80,134	62,224	17,910	2,966,809	2,268,988
1858	258,263	214,633	43,630	130,213	110,822	—	19,391	128,050	103,811	24,239	3,283,127	2,548,650
1859	228,456	184,874	43,582	107,872	87,850	—	20,022	120,584	97,024	23,560	3,418,462	2,645,402
1860	218,459	175,587	42,872	112,625	91,543	—	21,082	105,834	84,044	21,790	3,313,667	2,499,998
1861	308,912	267,389	41,523	208,050	189,433	—	18,617	100,862	77,956	22,906	3,283,893	2,488,482
1862	251,129	218,340	32,789	152,703	138,270	—	14,433	98,426	80,070	18,356	3,175,676	2,398,113
1863	259,079	221,186	37,893	159,453	143,618	—	15,835	99,626	77,568	22,058	3,323,461	2,563,346
1864	267,296	227,500	39,796	161,224	143,938	—	17,286	106,072	83,562	22,510	3,469,725	2,726,666
1865	277,749	228,269	49,480	169,963	143,758	—	26,205	107,786	84,511	23,275	3,424,714	2,698,328
1866	267,938	219,581	48,357	161,220	135,629	—	25,591	106,655	83,889	22,766	3,358,869	2,593,676
1867	261,982	212,440	49,542	156,924	133,660	—	23,264	105,058	78,780	26,278	3,698,820	2,892,746
1868	360,524	310,521	50,003	247,996	222,764	—	25,232	112,528	87,757	24,771	3,578,741	2,729,603
1869	—	—	49,543	—	—	19,616	26,552	147,727	124,736	22,991	3,666,146	2,771,643
1870	—	—	56,671	—	—	5,834	29,761	124,366	97,456	26,910	3,978,362	3,036,070
1871	—	—	56,462	—	—	4,970	30,288	80,929	54,755	26,174	3,841,832	2,880,414
1872	—	—	55,554	—	—	8,429	31,805	95,219	71,470	23,749	3,861,122	2,880,189
1873	—	—	58,893	—	—	9,263	31,880	98,307	71,294	27,013	4,216,052	3,215,209
1874	—	—	66,753	—	—	11,511	33,326	146,410	112,983	33,427	4,086,236	3,065,077
1875	—	—	63,346	—	—	27,153	27,846	175,856	140,356	35,500	4,336,503	3,294,617
1876	—	—	60,679	—	—	6,431	27,094	182,019	148,434	33,585	4,525,032	3,452,162
1877	—	—	62,259	—	—	15,391	28,802	207,568	174,111	33,457	4,479,337	3,374,601
1878	—	—	61,370	—	—	13,519	30,365	185,736	154,731	31,005	4,584,337	3,446,707
1879	—	—	57,897	—	—	15,101	31,102	107,867	81,072	26,795	4,617,888	3,446,427
1880	—	—	54,881	—	—	13,749	30,947	92,347	68,813	23,534	4,413,530	3,207,231
1881	—	—	14,122	—	—	—	—	71,917	57,795	14,122	2,634,505	2,634,505
1882	—	—	13,789	—	—	—	—	64,866	51,077	13,789	2,951,550	2,951,550
1883	—	—	63,531	—	—	9,215	38,771	80,744	55,984	24,760	6,495,255	5,203,536
1884	—	—	65,706	—	—	7,851	40,744	73,885	48,923	24,962	4,888,560	3,567,044
1885	—	—	67,606	—	—	8,890	39,928	81,626	53,948	27,678	4,992,472	3,640,471
1886	—	—	65,577	—	—	8,093	38,972	73,897	47,292	26,605	5,049,364	3,666,176
1887	—	—	67,639	—	—	5,172	40,938	71,716	45,015	26,701	5,273,216	3,858,121
1888	—	—	70,260	—	—	7,607	42,664	77,100	49,504	27,596	5,477,201	4,029,463
1889	—	—	75,800	—	—	7,687	48,921	80,272	53,393	26,879	5,526,731	4,045,596
1890	169,011	103,283	65,728	98,102	49,195	6,597	48,907	70,909	54,088	16,821	4,799,547	3,284,246
1891	208,018	131,768	76,250	124,393	74,458	8,471	49,935	83,625	57,310	26,315	5,515,215	3,953,373
1892	213,359	134,493	78,866	132,832	79,099	8,746	53,733	80,527	55,394	25,133	5,674,781	4,064,968
1893	206,452	121,148	85,304	126,252	67,806	7,138	58,446	80,200	53,342	26,858	5,791,579	4,132,323
1894	191,253	102,615	88,638	76,683	21,153	—	55,530	114,570	81,462	33,108	5,951,105	4,240,886
1895	206,324	135,966	70,358	95,237	56,302	—	38,935	111,087	79,664	31,423	5,883,048	4,120,301

(continued)

TABLE Bf176–187 Local public relief recipients in New York State and New York City, by type of relief: 1840–1895
Continued

Source

Previously unpublished data compiled from the following sources: New York Secretary of State *Annual Reports of the Secretary of State In Relation to the Statistics of the Poor, 1831–1896*, in New York State Legislature, Assembly, *Assembly Documents 1831*, volume 1, number 66; 1832, volume 1, number 33; 1833, volume 2, number 38; 1834, volume 3, number 173; 1835, volume 3, number 185; 1836, volume 2, number 72; 1837, volume 3, number 270; 1838, volume 6, number 311; 1839, volume 3, number 146; 1840, volume 8, number 332; 1841, volume 7, number 227; 1842, volume 5, number 121; 1843, volume 2, number 38; 1845, volume 5, number 197; 1850, volume 6, number 169; 1851, volume 5, number 147; 1853, volume 6, number 120; 1854, volume 4, number 144; 1856, volume 5, number 214; 1858, volume 1, number 10; 1859, volume 3, number 101; 1860, volume 2, number 71; 1861, volume 2, number 60; 1863, volume 8, number 230; 1864, volume 8, number 198; 1865, volume 7, number 147; 1866, volume 7, number 165; 1867, volume 7, number 145; 1868, volume 9, number 88; 1869, volume 6, number 79; 1870, volume 6, number 124; 1871, volume 3, number 46; 1872, volume 3, number 48; 1873, volume 3, number 32; 1877, volume 9, number 142; 1880, volume 3, number 62; 1881, volume 4, number 64; 1882, volume 2, number 34; 1884, volume 5, number 59; 1885, volume 5, number 45; 1886, volume 3, number 45; 1887, volume 7, number 46; 1890, volume 10, number 58; 1891, volume 12, number 60; 1892, volume 6, number 43; 1893, volume 10, number 58; 1894, volume 10, number 72; 1895, volume 13, number 74; 1896, volume 18, number 84; and New York State Legislature, Senate, *Senate Documents, 1844*, volume 2, number 73; 1847, volume 3, number 100; 1848, volume 3, number 79; 1849, volume 3, number 83; 1855, volume 3, number 72; 1857, volume 4, number 131; 1862, volume 4, number 65; 1874, volume 4, number 62; 1875, volume 4, number 52; 1876, volume 3, number 46; 1878, volume 2, number 28; 1879, volume 2, number 34; 1883, volume 2, number 25; 1888, volume 5, number 44; and 1889, volume 6, number 40, and from New York State Board of Charities, *Annual Reports, 1875–1897*.

Documentation

See the essay in this chapter on public assistance, colonial times to the 1920s, for additional information on public relief in New York.

Five-year averages of relief recipients as a percentage of the population and of the fraction of all recipients supported in the poorhouse appear in Joan Underhill Hannon, “Shutting Down Welfare: Two Cases From America’s Past,” *Quarterly Review of Economics and Finance* 37 (2) (1997): 419–38. Relief recipient data reported here reflect minor corrections and revisions to that reported for 1835–1860 in Joan Underhill Hannon, “Poverty in the Antebellum Northeast: The View from New York State’s Poor Relief Rolls,” *Journal of Economic History* 44 (4) (1984): 1007–32, and Joan Underhill Hannon, “Poor Relief Policy in Antebellum New York State: The Rise and Decline of the Poorhouse,” *Explorations in Economic History* (Academic Press, 1984), Tables 1 and 5.

Over the second half of the nineteenth century, state law gradually transferred some categories of relief recipients out of the system of local outdoor and poorhouse relief. Most significantly, an 1865 act required the removal of insane paupers from poorhouses to state asylums, and an 1875 act mandated the removal of children from poorhouses to orphanages or other charitable institutions. Though local governments paid for the support of the insane and children in these institutions, the recipients are not included in the data on local public relief recipients, series Bf176–185. Estimates of the number of recipients involved are reported in Joan Underhill Hannon, “Public Relief Dependency before the Welfare State: The Interplay of Life Cycles, Labor Markets, and Policy in Nineteenth Century New York State” (unpublished manuscript presented to the American Economic Association, January 1997), Figure 2.

The relief recipient data are constructed from two tables in the New York Secretary of State’s *Annual Reports on Statistics of the Poor*. Table A reports by county the whole number of paupers relieved or supported and the number of persons temporarily relieved during the year ended December 1 of each year. Table E reports by county the number of persons received into and born in the poorhouse and the number who left the poorhouse (died, bound out, discharged, or absconded) during the year, along with the number remaining in the poorhouse on December 1. Unfortunately, some counties failed to provide information in some categories; and in deriving

state totals, the published reports did not distinguish between zeros and missing data. Moreover, individual county reports on the number of recipients are often internally inconsistent.

The reports offer three logical ways to calculate the number supported in the poorhouse during the year. First, one can subtract the number temporarily relieved outdoors from the total relieved and supported. Second, one can add the number in the poorhouse at the end of the previous year to the number received and born in the poorhouse during the year. Third, one can take the sum of those reported leaving the poorhouse during the year and those remaining in the poorhouse at year-end. The three methods often yielded different results. Sometimes the reason for the discrepancy was readily apparent. Quite often, for example, it was clear that a county had included those already in the poorhouse at the end of the previous year in the number for those received during the year, producing by method 2 a figure that was too high by exactly the number in the house at the end of the previous year. If the source of the discrepancy could not be identified and corrected, the figures reported for number of persons supported in county and city poorhouses during the year (series Bf178, Bf182, and Bf185) for the period from 1840 to 1875 are based on the following procedure: If the differences between the three estimates were small (on the order of less than 5 percentage points), the middle figure was used. If the unexplained discrepancy was large, the data for that county were not used for that year.

Beginning in 1875, all issues of *Annual Reports of the New York State Board of Charities* include data on local public relief. Though the State Board of Charities worked with the same county superintendents’ annual reports to the Secretary of State, the Board of Charities did not simply replicate the tables from the Secretary of State’s *Annual Reports*. Instead, the Board of Charities calculated the number of poorhouse recipients according to the second procedure described earlier (the sum of the number in the poorhouse at the end of the previous years, and those received and those born in the poorhouse during the year). They added the resulting figure to the number temporarily relieved outdoors to get the total number relieved and supported. The figures reported by the State Board of Charities are always internally consistent but do not always match those reported by the Secretary of State. Often, notes to the tables indicate that the Board of Charities returned a report to the county superintendent for correction or clarification. For the period 1875–1895, the three methods outlined here were used to derive estimates of the number supported in the poorhouse from the *Annual Reports of the Secretary of State* and those were compared with the figure reported by the State Board of Charities. If one of the estimates matched that of the Board of Charities or if the differences between them were small, the figure from the Board of Charities was used. If there were large inexplicable discrepancies, the data for that county were not used for that year.

Series Bf176, Bf179, and Bf183. Calculated as the sum of the series on persons receiving temporary outdoor relief and those supported in the poorhouse. The series include only those counties for which both poorhouse and temporary outdoor recipient data are available. Though the counties included in the data set are the same for all series in a given year, included counties vary from year to year. As a result, the raw data may not accurately reflect year-to-year fluctuations in the total number of recipients; and per capita figures should not be calculated using total state population in the denominator. For this purpose, series Bf186–187 provide the population of counties covered by public poor relief data for New York State and for the state excluding New York City, assuming constant exponential population growth in each county between Census years.

Series Bf180–181. For 1840–1868, the data come directly from the *Annual Reports of the Secretary of State*. From 1869 through 1893, all issues of the *Annual Reports of the Secretary of State* report the number of families receiving temporary outdoor relief in New York City, series Bf181, rather than the number of individuals. For four of those years, 1890–1893, the number of persons receiving temporary outdoor relief in New York City is reported in the *Annual Report of the State Board of Charities*, and those figures are included in series Bf180.

Series Bf184. Derived from the *Annual Reports of the Secretary of State*, but includes only those counties for which data on the number supported in the poorhouse are also available.

SOCIAL WELFARE EXPENDITURES

Price V. Fishback and Melissa A. Thomasson

TABLE Bf188-195 Public expenditures on social welfare: 1890-1995¹

Contributed by Price V. Fishback and Melissa A. Thomasson

Fiscal year	Total	Social insurance	Public aid	Health and medical programs	Veterans' programs	Education	Housing	Other social welfare programs
	Bf188	Bf189	Bf190	Bf191	Bf192	Bf193	Bf194	Bf195
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1890	318.0	—	— ⁴	18.0	113.0	146.0	—	41.0 ⁴
1913	1,000.0	15.0	— ⁴	150.0	196.0	525.0	—	114.0 ⁴
1929	3,921.2	342.4	60.0	351.1	657.9	2,433.7	—	76.2
1930	4,084.9	360.9	77.8	378.1	667.8	2,522.8	—	77.5
1931	4,200.8	368.3	164.0	405.8	744.3	2,439.6	—	78.8
1932	4,303.4	355.3	255.9	434.5	825.0	2,351.8	—	80.9
1933	4,462.2	343.9	689.1	417.6	818.8	2,104.0	—	88.8
1934	5,832.0	361.8	2,530.5	400.3	529.5	1,913.8	0.4	95.8
1935	6,548.3	406.3	2,997.6	427.2	597.5	2,007.5	13.2	99.0
1936	10,184.2	455.6	3,079.4	453.9	3,825.5	2,227.6	41.7	100.5
1937	7,858.2	545.2	3,436.0	500.1	892.7	2,375.7	3.1	105.4
1938	7,923.5	848.6	3,232.9	539.5	627.3	2,563.0	3.9	108.2
1939	9,212.9	1,181.2	4,229.6	575.2	606.1	2,503.7	3.4	113.8
1940	8,795.1	1,271.8	3,597.0	615.5	629.0	2,561.2	4.2	116.4
1941	8,953.4	1,330.0	3,523.7	724.4	612.9	2,617.2	8.9	136.4
1942	8,609.2	1,375.6	2,777.1	948.7	645.4	2,694.2	14.3	153.9
1943	8,283.1	1,258.7	1,549.7	1,885.8	623.3	2,793.3	13.6	158.6
1944	8,227.6	1,255.7	1,031.5	2,225.1	720.0	2,800.4	13.3	181.6
1945	9,205.3	1,409.4	1,030.6	2,354.2	1,125.8	3,076.3	11.1	197.9
1946	12,797.9	3,652.1	1,150.6	1,904.1	2,402.9	3,296.8	158.7	232.7
1947	17,337.0	4,160.0	1,441.8	1,367.0	5,682.5	4,089.0	280.9	315.6
1948	18,652.3	3,602.8	1,702.0	1,416.0	6,638.2	4,897.3	27.3	368.8
1949	21,164.9	4,185.8	2,089.1	1,753.1	6,926.7	5,806.6	7.7	395.9
1950	23,508.4	4,946.6	2,496.2	2,063.5	6,865.7	6,674.1	14.6	447.7
1951	24,054.7	4,772.2	2,591.7	2,782.8	5,996.0	7,415.1	35.0	461.9
1952	25,576.4	5,671.0	2,584.7	3,331.3	5,255.6	8,245.7	37.1	451.0
1953	27,044.9	6,607.3	2,727.9	3,190.4	4,734.7	9,230.9	50.6	503.0
1954	29,546.8	8,264.7	2,788.2	3,099.1	4,630.9	10,084.4	67.4	612.1
1955	32,639.9	9,834.9	3,003.0	3,103.1	4,833.5	11,157.2	89.3	619.0
1956	35,130.6	10,646.1	3,114.7	3,307.1	5,061.2	12,154.4	111.7	735.4
1957	39,350.4	12,471.8	3,308.5	3,775.8	5,118.8	13,732.3	120.2	823.0
1958	45,456.9	15,956.7	3,615.4	4,090.9	5,426.7	15,312.6	134.2	920.4
1959	49,821.4	18,286.5	3,997.9	4,400.6	5,472.3	16,498.3	156.2	1,009.6
1960	52,293.3 ²	19,306.7	4,101.1	4,463.8 ²	5,479.2	17,626.2	176.8	1,139.4
1961	58,236.0	22,364.9	4,444.3	4,927.0	5,623.7	19,337.2	196.1	1,342.8
1962	62,658.8	24,193.8	4,945.3	5,229.8	5,654.1	21,004.6	216.6	1,414.5
1963	66,766.2	25,613.5	5,295.9	5,593.5	5,751.2	22,670.7	248.1	1,593.4
1964	71,491.1	26,971.3	5,642.1	6,003.5	5,861.5	24,989.0	277.7	1,746.0
1965	77,083.8	28,122.8	6,283.4	6,155.0	6,031.1	28,107.8	318.1	2,065.6
1966	87,802.8 ³	31,934.6	7,301.1	6,740.0	6,358.3	32,825.1	334.9	2,308.8
1967	99,465.1	37,338.7	8,811.0	7,383.0	6,898.3	35,807.8	377.8	2,848.5
1968	113,553.4	42,740.4	11,091.6	8,172.0	7,246.7	40,589.7	427.6	3,285.4
1969	126,970.7	48,772.1	13,439.1	8,828.0	7,933.6	43,673.1	532.3	3,792.5
1970	145,555.1 ²	54,691.2	16,487.8	9,606.0 ²	9,078.1	50,845.5	701.2	4,145.3
1971	171,256.7 ³	66,368.8	21,262.0	10,437.0	10,455.0 ³	56,704.7	1,046.2 ³	4,983.0
1972	190,315.2	74,809.4	26,078.2	11,824.0	11,522.3	59,385.1	1,332.4	5,363.8
1973	213,293.9 ³	86,165.6	28,691.4	12,799.0	13,026.4	64,733.7	2,179.6	5,698.2 ³
1974	238,641.6 ³	99,001.4	31,520.4	14,198.0	14,112.4	70,533.9	2,554.0	6,721.5 ³
1975	289,173.0	123,013.1	41,446.6	16,742.0	17,018.9	80,834.1	3,171.7	6,946.6
1976	331,613.8 ³	145,703.4	49,023.4 ³	18,356.0	18,958.0	87,729.7	3,370.8	8,472.5
1977	360,458.8 ³	160,881.3	53,812.4 ³	19,441.0	19,014.3	93,878.3	4,358.1	9,071.4
1978	394,265.6 ³	175,089.6	59,925.8 ³	22,201.0	19,744.0 ³	101,517.8	5,224.7	10,562.7
1979	430,066.9 ³	194,287.5	65,307.0 ³	24,040.0	20,601.6	109,261.5	5,493.1	11,076.2

Notes appear at end of table

(continued)

TABLE Bf188-195 Public expenditures on social welfare: 1890-1995 *Continued*

Fiscal year	Total	Social insurance	Public aid	Health and medical programs	Veterans' programs	Education	Housing	Other social welfare programs
	Bf188	Bf189	Bf190	Bf191	Bf192	Bf193	Bf194	Bf195
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1980	492,713.7 ²	229,754.4	72,703.1	27,263.0 ²	21,465.5	121,049.6	6,879.0	13,599.1
1981	552,882.8 ³	267,394.8	83,634.0	29,588.0	23,440.9 ³	130,108.5	6,733.5 ³	11,983.1
1982	601,344.9 ³	302,614.8	82,206.2 ³	32,870.0	24,708.1	138,089.3	9,202.1	11,654.4
1983	649,229.1	331,161.2	88,330.7	34,090.0	25,801.9	146,415.4	10,963.5	12,466.4
1984	678,112.1	341,120.2	92,979.4	35,722.0	26,274.9	157,188.9	11,531.8	13,294.9
1985	732,249.5 ^{3,2}	369,595.2	98,361.8	39,053.0 ²	27,041.7 ³	172,047.5	12,598.5	13,551.8
1986	781,725.2	390,770.1	104,200.2	43,953.0	27,444.9	189,234.6	11,961.8 ³	14,160.6
1987	834,121.9	412,873.9	112,115.1	48,067.0	28,050.8	204,563.7	13,173.5	15,277.9
1988	887,951.2 ³	434,051.3	119,723.4	53,096.0	29,663.4 ³	219,382.2	16,555.9	15,479.0
1989	957,394.6 ³	468,051.7 ³	128,609.8	57,123.0	30,103.7 ³	238,771.0	18,126.7	16,608.7
1990	1,048,950.8	513,821.8	146,811.1	61,684.0	30,916.2	258,331.6	19,468.5	17,917.6
1991	1,159,626.4	561,175.2	181,334.4	65,810.0	32,857.3	277,147.1	21,522.6	19,779.8
1992	1,266,867.1	618,938.8	207,953.0	70,114.0	35,642.0	292,070.6	20,617.2	21,531.5
1993	1,366,754.1 ³	659,209.9	220,999.8	74,717.0 ³	36,378.3	331,996.8	20,782.3	22,670.0
1994	1,435,819.3 ³	683,778.7	238,025.3	80,235.0 ³	37,894.8	344,091.0	27,032.0	24,762.5
1995	1,505,136.4	705,483.3	253,530.0	85,507.0	39,072.0	365,625.3	29,361.1	26,557.7

¹ See text on inclusion of Alaska, Hawai'i, and outlying areas.

² The data reported in the 1997 and 1999 source articles do not precisely match the data in the July 1995 source, owing to revisions in the procedures for estimating health expenditures. The differences for them are typically less than \$500 million.

³ Revised figure. See text.

⁴ Public aid included with other social welfare services.

Sources

Estimates presented for 1890 and 1913 were based primarily on the following: R. A. Musgrave and J. J. Culbertson, "The Growth of Public Expenditures in the U.S., 1890-1948," *National Tax Journal* (June 1953): 97-115; J. Frederic Dewhurst and Associates, *America's Needs and Resources* (Twentieth Century Fund, 1955); and reports of official agencies. Data for 1929-1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929-90* (July 1995); Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1992," *Social Security Bulletin* 58 (2) (1995): 65-73. Data for 1990-1995 are from Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 88.

The information is updated annually in the *Social Security Bulletin* and the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3.

Documentation

The material for the period 1929-1964 was first reported in Ida C. Merriam and Alfred M. Skolnik, *Social Welfare Expenditures under Public Programs in the United States, 1929-1966*, Research Report number 25 (U.S. Social Security Administration, 1968). This report included a compendium of detailed data covering each year from 1929 to 1966, and a complete description of the methodology used in formulating the series. In situations where the published information for a year differs in the sources, the number published later was used with one exception: there was a misprint for the 1991 data in the 1996 *Annual Statistical Supplement*, and so the data for 1991 are from Summer 1995 *Social Security Bulletin*.

Information on the state and local breakdown for all of the programs in Tables Bf212-270 from 1929 through 1989 is available in U.S. Social Security Administration (July 1995); Merriam and Skolnik (1968); and the annual articles in the *Social Security Bulletin*. For example, see Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 43-4; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 89, 90.

Scattered data relating to social welfare programs in particular localities or states may be found in other sources. The definitions used in these sources, however, are highly variable and the original source of the data is frequently not indicated. No data comparable to those shown for 1929-1993 are readily available.

Social welfare expenditures include the areas of income maintenance, health, education, housing, veterans' benefits, and other welfare services directed specifically toward promoting the economic and social welfare of individuals and families. The social welfare expenditures data collected by the U.S. Social Security Administration fit the definitions of social welfare spending used by the Organization for Economic Co-operation and Development and the International Labour Office. Expenditures are grouped on the basis of statutory programs and administrative structure rather than strictly by function. Finally, the economic status of the individual or family receiving benefits is not a criterion for inclusion in the series. Rather, the requirement is that the funds be expended through the government apparatus in compliance with or as a result of public law. For further information about the components of these series, see the text for Tables Bf212-270.

Social welfare expenditures under public programs represent payments from federal, state, and local revenues (general and special) and trust funds. They include capital outlays as well as administrative expenses unless otherwise noted. Some payments abroad are included. Programs or services financed by loans are excluded. The expenditures are reported on a fiscal year basis. Through 1976, the fiscal year ended June 30 for the federal government, most states, and some localities. Beginning in 1977, federal fiscal years end on September 30.

Data on federal programs include expenditures in Alaska and Hawai'i for all years; state and local data include expenditures in Alaska and Hawai'i from the year of their admission to the Union. Data include federal expenditures (and matching local expenditures under grant programs) in Puerto Rico, the Virgin Islands, Guam, Trust Territory of the Pacific, American Samoa, and the Panama Canal Zone, as well as expenditures to beneficiaries of some of the income-maintenance programs residing in foreign countries, and that part of Defense Department education and health expenses incurred abroad.

Wherever possible, data for federal, federal-state, and federal-local programs were drawn from published and unpublished materials of the appropriate federal agencies and from the annual *Budget of the United States Government*. The principal source for state, state-local, and local program statistics has been the census of governments. To bridge gaps, especially for early years of the series, and to augment fragmentary data, the U.S. Social Security Administration has estimated expenditures for certain years for some programs (e.g., state and local public employee retirement benefits and administration). The series are often revised in response to new data, new benchmarks, and changes in reporting from other sources. The U.S. Social Security Administration often publishes the revised versions of the recent data but in many cases offers revised information for earlier years for years ending in 0 and 5. Discussions with the people at the U.S. Social Security Administration who compile the statistics suggest that a search for "the" number in any single year would be futile. The numbers are basically estimates from surveys, reports of other agencies, and other sources, and they

(continued)

TABLE Bf188-195 Public expenditures on social welfare: 1890-1995 *Continued*

should be treated as rough approximations of the "true" level. The people at the U.S. Social Security Administration are very careful to try to maintain consistency in the definitions of the series. However, even the revisions are subject to measurement error, and year-to-year fluctuations between a revised statistic for a year ending in 0 or 5 with neighboring years are likely to be subject to measurement error. The majority of revisions are within 1 or 2 percent of the prior reported estimates.

The footnoted revisions to the table are based on corrections to the information reported in the sources that arise from cross checking the sums of series that should add up to totals in that category. In all cases, the cor-

rections are based on new sums using the most disaggregated data reported in the source and then recalculating the sums. For example, if there was a discrepancy between the all government spending in a category and the sum of state and local plus federal spending in the category, we used the sum of state and local plus federal spending unless there was an obvious error. For the data presented here, efforts were made to account for all differences from 1965 to the present. Differences between the total series and the sums of the subcategories of \$0.1 million in years prior to 1965 were left unaltered because they might be the result of rounding error.

TABLE BF196-211 Public expenditures on social welfare, by federal or state-local source of funds: 1890-1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Federal funds										State and local funds									
	Social insurance					Health and medical programs					Veterans' programs					Other social welfare programs				
	Total	BF197	BF198	BF199	BF200	BF201	BF202	BF203	Total	BF204	BF205	BF206	BF207	BF208	BF209	BF210	BF211			
1890	115.0	—	—	—	—	—	—	—	203.0	—	—	—	—	—	—	—	—			
1913	196.0	—	—	—	—	—	—	—	804.0	—	—	—	—	—	—	—	—			
1929	798.4	55.9	—	46.7	657.9	36.5	1.4	3,122.8	286.5	286.5	60.0	304.4	—	2,397.2	—	—	74.8			
1930	817.1	60.3	—	47.4	667.8	40.1	1.5	3,267.8	300.6	300.6	77.8	330.7	—	2,482.7	—	—	76.0			
1931	911.0	68.9	—	50.8	744.3	45.3	1.7	3,289.8	299.4	299.4	164.0	355.0	—	2,394.3	—	—	77.1			
1932	1,002.3	74.6	—	55.1	825.0	45.9	1.7	3,301.1	280.8	280.8	255.9	379.4	—	2,305.9	—	—	79.2			
1933	1,338.8	81.2	—	51.8	818.8	40.7	1.7	3,123.4	262.8	262.8	344.4	365.8	—	2,063.3	—	—	87.2			
1934	2,771.0	94.6	2,003.8	48.0	529.5	93.0	1.6	3,061.1	267.2	267.2	526.7	352.3	—	1,820.7	—	—	94.2			
1935	3,207.2	118.9	2,373.7	49.5	597.5	52.7	1.7	3,341.1	287.4	287.4	623.9	377.7	—	1,954.8	—	—	97.2			
1936	6,505.9	1,329	2,309.6	54.5	3,825.5	138.6	3.2	3,678.3	322.7	322.7	769.8	393.3	—	2,089.1	—	—	97.4			
1937	3,788.1	193.3	2,494.1	69.7	880.4	143.4	4.1	4,070.1	351.8	351.8	942.0	430.3	12.4	2,232.3	—	—	101.3			
1938	3,254.6	295.2	2,075.3	72.6	615.1	187.5	5.0	4,669.0	553.4	553.4	1,157.6	466.9	12.3	2,375.5	—	—	103.3			
1939	3,986.8	357.8	2,870.7	79.0	596.3	72.7	6.9	5,226.2	823.3	823.3	1,358.9	496.2	9.8	2,431.0	—	—	107.0			
1940	3,443.1	393.8	2,243.1	96.6	619.8	74.7	4.2	5,351.0	878.0	878.0	1,352.8	518.9	9.2	2,486.6	—	—	105.5			
1941	3,660.3	470.0	2,187.6	231.5	604.5	135.8	8.9	5,293.1	860.0	860.0	1,336.1	492.9	8.3	2,481.5	—	—	114.4			
1942	3,605.3	531.7	1,698.0	470.7	636.9	217.9	14.3	5,003.9	843.9	843.9	1,079.1	478.0	8.5	2,476.3	—	—	118.1			
1943	3,684.2	565.1	818.3	1,382.7	616.9	251.3	13.6	4,598.9	693.6	693.6	731.3	503.1	6.5	2,542.0	—	—	122.5			
1944	3,758.7	630.8	427.5	1,725.4	713.4	192.7	13.3	4,468.9	624.8	624.8	604.0	499.7	6.6	2,607.7	—	—	126.0			
1945	4,339.4	734.9	420.1	1,801.4	1,118.5	187.3	11.1	4,865.9	674.5	674.5	610.4	552.8	7.4	2,889.0	—	—	131.8			
1946	6,343.3	1,912.6	449.2	1,273.3	2,348.5	126.5	158.7	6,454.6	1,739.5	1,739.5	701.5	630.7	54.4	3,170.4	—	—	158.1			
1947	9,794.1	2,605.0	617.2	554.7	5,504.4	129.4	280.9	7,542.9	1,555.0	1,555.0	824.7	812.4	178.1	3,959.6	—	—	213.1			
1948	9,481.7	2,039.8	724.0	421.2	6,001.1	140.7	27.3	9,170.6	1,563.1	1,563.1	977.9	994.7	637.1	4,756.6	—	—	241.2			
1949	10,252.4	2,103.1	941.5	522.0	6,399.8	138.5	7.7	10,912.5	2,082.7	2,082.7	1,147.6	1,231.1	526.9	5,668.1	—	—	256.0			
1950	10,541.1	2,103.0	1,103.2	603.5	6,386.2	156.7	14.6	12,967.3	2,843.6	2,843.6	1,393.0	1,460.0	479.5	6,517.5	—	—	273.7			
1951	11,125.6	2,723.5	1,169.8	1,169.8	5,661.3	180.3	21.6	12,929.1	2,048.8	2,048.8	1,395.3	1,613.0	334.7	7,234.8	13.4	—	289.1			
1952	11,729.9	3,342.1	1,211.3	1,585.7	5,112.9	307.9	25.1	13,846.5	2,328.9	2,328.9	1,373.4	1,745.5	142.8	7,937.8	12.0	—	306.1			
1953	12,244.2	4,224.0	1,360.8	1,380.3	4,620.6	429.3	37.9	14,800.6	2,383.3	2,383.3	1,367.1	1,810.1	114.1	8,801.6	12.7	—	311.7			
1954	12,990.3	5,093.6	1,419.5	1,209.6	4,528.1	418.8	53.8	16,556.5	3,171.1	3,171.1	1,368.7	1,889.6	102.8	9,665.6	13.7	—	345.1			
1955	14,622.9	6,385.0	1,504.2	1,150.3	4,771.9	485.1	74.7	18,017.1	3,449.9	3,449.9	1,498.8	1,952.8	61.6	10,672.1	14.6	—	367.3			
1956	16,211.7	7,534.1	1,555.4	1,256.0	4,972.0	475.7	92.0	18,918.8	3,112.0	3,112.0	1,559.3	2,051.0	89.2	11,678.7	19.7	—	408.8			
1957	18,129.5	8,926.4	1,690.0	1,410.4	5,079.6	540.5	101.2	21,220.9	3,545.3	3,545.3	1,618.5	2,365.4	39.3	13,191.8	19.0	—	441.6			
1958	20,631.2	10,856.5	1,834.9	1,567.1	5,305.3	607.8	110.6	24,825.8	5,100.2	5,100.2	1,780.5	2,523.8	121.4	14,704.8	23.7	—	571.4			
1959	23,550.3	13,054.0	2,082.1	1,716.5	5,411.2	766.7	127.8	26,271.1	5,232.6	5,232.6	1,915.8	2,684.1	61.1	15,731.5	28.4	—	617.6			
1960	24,956.7	14,307.2	2,116.9	1,737.1	5,367.4	867.9	143.5	27,336.6	4,999.4	4,999.4	1,984.2	2,726.8	111.9	16,758.3	33.2	—	722.8			
1961	27,402.6	15,965.7	2,337.3	1,949.4	5,539.4	1,000.5	159.2	30,833.4	6,399.2	6,399.2	2,107.1	2,977.6	84.3	18,336.7	36.9	—	891.7			
1962	30,624.4	18,289.5	2,741.3	2,241.9	5,558.9	1,089.6	173.4	32,034.3	5,904.3	5,904.3	2,204.1	2,987.9	95.2	19,915.0	43.2	—	884.6			
1963	32,674.9	19,417.1	2,999.3	2,441.0	5,731.2	1,322.6	192.6	34,091.3	6,196.3	6,196.3	2,296.6	3,152.5	20.0	21,348.1	55.5	—	1,022.3			
1964	34,928.0	20,646.1	3,208.2	2,749.1	5,842.6	1,619.5	212.1	36,563.1	6,325.3	6,325.3	2,433.9	3,254.3	18.9	23,369.5	65.6	—	1,095.6			

Note appears at end of table

(continued)

TABLE Bf196-211 Public expenditures on social welfare, by federal or state-local source of funds: 1890-1995 Continued

Year	Federal funds											State and local funds				
	Social insurance			Health and medical programs			Veterans' programs			Education		Housing		Other social welfare programs		
	Bf197	Bf198	Bf199	Bf200	Bf201	Bf202	Bf203	Total	Social insurance	Public aid	Health and medical programs	Veterans' programs	Education	Housing	Other social welfare programs	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1965	37,591.2	3,593.9	2,660.0	6,010.7	2,469.8	238.1	812.0	39,492.6	6,316.1	2,689.5	3,495.0	20.4	25,638.0	80.0	1,253.6	
1966	45,242.7 ¹	4,366.0	3,010.0	6,337.0 ¹	4,580.5	250.8	1,034.8	42,560.1	6,271.0	2,935.1	3,730.0	21.3	28,244.6	84.1	1,274.0	
1967	53,173.9	5,244.4	3,588.0	6,875.2	5,278.8	283.0	1,359.7	46,291.2	6,793.9	3,566.6	3,795.0	23.1	30,529.0	94.8	1,488.8	
1968	60,168.3	6,455.1	4,087.0	7,214.2	5,000.3	325.1	1,696.6	53,385.1	7,350.4	4,636.5	4,085.0	32.5	35,389.4	102.5	1,588.8	
1969	68,146.3	7,829.0	4,334.0	7,883.0	4,922.9	425.5	1,904.5	58,824.4	7,924.7	5,610.1	4,494.0	50.6	38,750.2	106.8	1,886.4	
1970	77,130.1	9,648.6	4,568.0	8,951.6	5,875.8	581.6	2,258.9	68,425.0	9,445.6	6,839.2	5,038.0	126.5	44,969.7	119.6	1,886.4	
1971	92,346.8 ¹	12,990.3	4,909.0	10,330.1 ¹	6,597.4	871.1 ¹	2,746.3	78,909.9	12,466.2	8,271.7	5,528.0	124.9	50,107.3	175.1	2,236.7	
1972	105,869.6	16,291.3	5,865.0	11,405.2	6,721.3	1,183.2	3,155.1	84,445.6	13,560.9	9,786.9	5,959.0	117.1	52,663.8	149.2	2,208.7	
1973	122,154.3	72,248.8	18,061.0	6,286.0	7,359.6	1,749.7	3,545.9 ¹	91,139.6 ¹	13,916.8	10,630.4	6,513.0	123.1	57,374.1	429.9	2,152.3 ¹	
1974	136,723.5	82,832.3	20,387.7	13,873.8	7,041.5	2,009.1	3,902.1	101,918.1 ¹	16,169.1	11,132.7	7,521.0	238.6	63,492.4	544.9	2,819.4 ¹	
1975	166,884.2	27,275.8	7,890.0	16,569.8	8,629.3	2,540.7	4,263.6	122,288.8	23,298.1	14,170.8	8,852.0	449.1	72,204.8	631.0	2,683.0	
1976	196,672.6 ¹	32,670.1 ¹	9,079.0	18,796.1	9,023.2	2,906.0	4,598.0	134,941.2 ¹	26,103.2	16,353.3 ¹	9,277.0	161.9	78,706.5	464.8	3,874.5	
1977	217,895.5	34,744.7	9,419.0	18,860.6	9,741.0	4,005.5	5,465.9	142,563.3 ¹	26,138.6	18,157.2 ¹	10,022.0	153.7	84,137.3	352.6	3,601.9	
1978	239,788.7 ¹	40,392.5	10,724.0	19,570.3 ¹	10,900.8	4,887.3	5,949.1	154,476.9 ¹	27,724.9	19,533.3 ¹	11,477.0	173.7	90,617.0	337.4	4,613.6	
1979	263,446.2	44,247.2	11,282.0	20,411.9	12,108.0	5,069.2	6,448.6	166,620.7 ¹	30,408.2	21,059.8 ¹	12,758.0	189.7	97,153.5	423.9	4,627.6	
1980	303,165.5	49,394.2	12,840.0	21,253.6	13,452.2	6,277.6	8,785.9	189,548.2	38,592.4	23,308.9	14,423.0	211.9	107,597.4	601.4	4,813.2	
1981	345,179.5 ¹	56,818.1	13,837.0	23,228.8 ¹	13,372.4	6,045.2 ¹	7,304.5	207,703.3	42,821.3	26,815.9	15,751.0	212.1	116,736.1	688.3	4,678.6	
1982	370,172.2	53,434.1	14,883.0	24,462.8	11,916.9	8,423.8	6,500.2	231,172.7 ¹	52,063.4	28,772.1 ¹	17,987.0	245.3	126,172.4	778.3	5,154.2	
1983	402,252.0	274,315.4	15,153.0	25,961.0	12,399.3	9,960.5	7,028.0	246,977.1 ¹	56,845.8	30,495.9	18,937.0	240.9	134,016.1	1,003.0	5,438.4	
1984	421,194.1	288,742.6	16,029.0	25,668.1	13,009.5	10,225.9	7,349.2	256,918.0	52,577.6	33,111.3	19,693.0	305.1	144,179.4	1,305.9	5,945.7	
1985	450,790.6 ¹	63,479.9	18,029.0	26,703.8 ¹	13,796.2	11,058.8	7,548.2	281,458.9	59,420.5	34,881.9	21,024.0	337.9	158,251.3	1,539.7	6,003.6	
1986	472,761.8 ¹	67,299.1	19,440.0	27,072.1	15,022.4	10,089.6 ¹	7,822.3	308,963.4	64,753.8	36,901.1	24,513.0	372.8	174,212.2	1,872.2	6,338.3	
1987	497,932.1	342,932.7	20,813.0	27,640.8	16,062.0	11,044.2	8,504.5	336,189.8	69,941.2	41,180.2	27,254.0	410.0	188,501.7	2,129.3	6,773.4	
1988	527,470.8 ¹	75,989.6	22,875.0	29,254.4	16,966.4	14,005.9	8,111.4	360,480.4	73,783.2	43,733.8	30,221.0	409.0	202,415.8	2,550.0	7,367.6	
1989	565,107.9 ¹	387,286.5 ¹	24,117.0	29,638.2 ¹	18,659.9	15,183.9	8,491.7	392,486.7	80,765.2	46,879.1	33,006.0	465.5	220,111.1	2,942.8	8,117.0	
1990	616,640.6	42,256.6	92,858.5	27,206.0	18,374.0	16,612.4	8,905.4	432,310.2	91,565.2	53,952.6	34,478.0	488.5	239,957.6	2,856.1	9,012.2	
1991	676,384.2	45,534.4	113,234.9	29,672.0	19,084.5	18,696.1	9,831.1	483,242.2	107,640.8	68,099.5	36,138.0	526.1	258,062.6	2,826.5	9,948.7	
1992	750,237.3	496,075.6	138,703.7	31,685.0	20,059.6	17,949.6	10,676.6	516,629.8	122,863.2	69,249.3	38,429.0	554.8	272,011.0	2,667.6	10,854.9	
1993	805,335.7	534,211.9	151,850.5	35,806.3	20,454.9	18,984.8	10,838.3	561,418.4	124,998.0	69,149.3	41,528.0	572.0	311,541.9	1,797.5	11,831.7	
1994	852,875.7	557,320.7	162,674.7	34,770.0	24,084.2	24,987.2	11,777.3	582,943.6	126,458.0	75,350.6	45,465.0	633.2	320,006.8	2,044.8	12,985.2	
1995	888,357.3	579,803.7	170,260.0	38,384.9	23,472.0	27,276.0	12,393.7	616,779.1	125,679.6	83,270.0	48,740.0	687.1	342,153.3	2,085.1	14,164.0	

¹ Revised figure. See text for Table Bf188-195.

Sources

Estimates presented for 1890 and 1913 were primarily based on the following: R. A. Musgrave and J. J. Culbertson, "The Growth of Public Expenditures in the U.S., 1890-1948," *National Tax Journal* (June 1953); 97-115; J. Fredenc Dewhurst and Associates, *America's Needs and Resources* (Twentieth Century Fund, 1955); and reports of official agencies. Data for 1929-1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929-90* (July 1995); Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1992," *Social Security Bulletin* 58 (2) (1995): 65-73. Data for 1990-1995 come from Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 43-4; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 89, 90. More detailed breakdowns for all of the programs in Tables Bf212-270 from 1929 through 1989 are available in these sources, as well. See the text for Table Bf188-195 for further discussion of the sources.

Documentation

Federal grants-in-aid are classified as expenditures from federal funds (contrary to the practice in the national income accounts, which include them as expenditures from state and local funds). Benefit payments under the state unemployment insurance programs are classified as expenditures from state funds (in the national income accounts, they are classified as federal expenditures, based on the fact that the state unemployment insurance trust funds are held and invested by the Secretary of the Treasury). Federal grants to the states for the administration of unemployment insurance and the employment service are classified as expenditures from federal funds, as are the benefits paid under the temporary extended unemployment insurance acts of 1958 and 1961.

The expenditures for state and federal funds for each category should sum to the expenditures reported for each category in Table Bf188-195. In some cases during the period 1990 through 1995, there are disparities. The differences arise because revisions for Table Bf188-195 have been reported later than revisions for Table Bf196-211.

TABLE Bf212-224 Public expenditures on social welfare – social insurance: 1929–1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Old-Age, Survivors, Disability, and Health Insurance (OASDHI)										State temporary disability insurance				Workers' compensation		
	Total		Old-Age, Survivors, and Disability Insurance		Health Insurance (Medicare)		Unemployment insurance and employment services		Railroad temporary disability insurance		Total		On hospital and medical benefits		Total		
	Bf212	Bf213	Bf214	Bf215	Bf216	Bf217	Bf218	Bf219	Bf220	Bf221	Bf222	Bf223	Bf224	Bf221	Bf222	Bf223	Bf224
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1929	342.4	—	—	—	—	113.1	—	—	—	—	—	—	—	—	—	229.3	75.0
1930	360.9	—	—	—	—	122.1	—	—	—	—	—	—	—	—	—	238.8	75.0
1931	368.3	—	—	—	—	135.6	—	—	—	—	—	—	—	—	—	232.7	75.0
1932	355.3	—	—	—	—	146.4	—	—	—	—	—	—	—	—	—	209.0	68.0
1933	343.9	—	—	—	—	163.6	—	—	—	—	—	—	—	—	—	180.3	58.0
1934	361.8	—	—	—	—	186.2	—	—	—	—	—	—	—	—	—	172.7	55.0
1935	406.3	—	—	—	—	208.8	—	—	—	—	—	—	—	—	—	188.4	65.0
1936	455.6	0.5	0.5	—	0.6	233.0	17.6	—	—	—	—	—	—	—	—	204.0	73.0
1937	545.2	19.5	5.8	—	5.8	244.2	45.1	—	—	—	—	—	—	—	—	230.6	75.0
1938	848.6	26.1	26.1	—	85.5	256.8	236.2	—	—	—	—	—	—	—	—	244.0	80.0
1939	1,181.2	36.5	36.5	—	110.0	269.5	516.7	1.7	—	—	—	—	—	—	—	246.7	80.0
1940	1,271.8	40.4	40.4	—	116.8	283.4	553.0	18.9	—	—	—	—	—	—	—	259.2	90.0
1941	1,330.0	91.2	91.2	—	124.7	297.9	507.0	21.1	—	—	—	—	—	—	—	288.1	98.0
1942	1,375.6	137.0	137.0	—	129.5	322.0	451.8	11.4	—	—	—	—	—	—	—	323.8	104.0
1943	1,258.7	176.8	176.8	—	133.7	305.4	281.2	3.9	—	—	—	—	—	—	—	356.8	110.0
1944	1,255.7	217.2	217.2	—	137.6	331.7	173.5	3.7	—	—	—	—	—	—	—	387.3	116.0
1945	1,409.4	266.8	266.8	—	145.0	355.0	216.7	4.3	—	—	—	—	—	—	—	416.6	122.0
1946	3,652.1	357.9	357.9	—	156.5	412.6	2,255.9	24.2	—	—	—	—	—	—	—	440.0	132.0
1947	4,160.0	466.4	466.4	—	177.8	510.1	2,453.7	51.2	—	—	—	—	—	—	—	485.2	150.0
1948	3,602.8	559.1	559.1	—	229.8	579.5	1,600.8	35.9	—	—	—	—	—	—	—	535.7	168.0
1949	4,185.8	660.5	660.5	—	287.9	649.1	1,876.2	50.5	—	—	—	—	—	—	—	579.6	180.0
1950	4,946.6	784.1	784.1	—	306.4	817.9	2,190.1	119.6	—	—	—	—	—	—	—	625.1	193.0
1951	4,772.2	1,568.5	1,568.5	—	321.8	920.0	1,062.8	28.3	—	—	—	—	—	—	—	699.2	216.0
1952	5,671.0	2,067.0	2,067.0	—	400.4	998.7	1,189.4	26.3	—	—	—	—	—	—	—	786.8	245.0
1953	6,607.3	2,716.9	2,716.9	—	466.5	1,123.5	1,143.2	57.8	—	—	—	—	—	—	—	856.1	270.0
1954	8,264.7	3,364.2	3,364.2	—	518.0	1,250.6	1,871.8	100.4	—	—	—	—	—	—	—	902.5	295.0
1955	9,834.9	4,436.3	4,436.3	—	556.0	1,388.5	2,080.6	158.7	—	—	—	—	—	—	—	943.0	315.0
1956	10,646.1	5,485.2	5,485.2	—	607.5	1,577.3	1,623.5	59.7	—	—	—	—	—	—	—	1,007.9	335.0
1957	12,471.8	6,665.9	6,665.9	—	685.5	1,785.3	1,841.6	88.1	—	—	—	—	—	—	—	1,083.6	355.0
1958	15,956.7	8,221.1	8,221.1	—	729.9	2,026.3	3,302.5	176.0	—	—	—	—	—	—	—	1,142.2	370.0
1959	18,286.5	9,615.9	9,615.9	—	790.2	2,342.5	3,731.1	200.2	—	—	—	—	—	—	—	1,222.7	390.0
1960	19,306.7	11,032.3	11,032.3	—	934.7	2,569.9	2,829.6	215.2	—	—	—	—	—	—	—	1,308.5	420.0
1961	22,364.9	12,160.8	12,160.8	—	996.1	2,870.2	4,280.0	213.4	—	—	—	—	—	—	—	1,401.4	450.0
1962	24,193.8	13,984.8	13,984.8	—	1,036.9	3,189.7	3,853.8	163.2	—	—	—	—	—	—	—	1,501.4	475.0
1963	25,613.5	15,344.6	15,344.6	—	1,077.3	3,569.3	3,390.6	122.8	—	—	—	—	—	—	—	1,611.8	510.0
1964	26,971.3	16,201.1	16,201.1	—	1,107.3	4,056.7	3,273.8	92.6	—	—	—	—	—	—	—	1,722.0	545.0
1965	28,122.8	16,997.5	16,997.5	—	1,128.1	4,528.5	3,002.6	76.7	—	—	—	—	—	—	—	1,859.4	580.0
1966	31,934.6	20,295.2	20,295.2	63.6	1,211.6	5,145.4	2,662.4	52.4	—	—	—	—	—	—	—	2,017.5	640.0
1967	37,338.7	24,580.7	24,580.7	3,394.6	1,278.4	5,903.6	2,752.2	38.5	—	—	—	—	—	—	—	2,217.3	715.0
1968	42,740.4	28,748.4	28,748.4	5,347.2	1,416.6	6,581.9	2,928.6	46.2	—	—	—	—	—	—	—	2,408.3	790.0
1969	48,772.1	33,388.7	33,388.7	6,597.7	1,550.7	7,493.8	2,947.1	44.3	—	—	—	—	—	—	—	2,640.9	875.0

Note appears at end of table

(continued)

TABLE Bf212-224 Public expenditures on social welfare – social insurance: 1929–1995 *Continued*

Year	Old-Age, Survivors, Disability, and Health Insurance (OASDHI)				Unemployment insurance and services				State temporary disability insurance				Workers' compensation	
	Total		Health Insurance (Medicare)		Public employment retirement		Railroad Retirement		Railroad temporary disability insurance		On hospital and medical benefits		On hospital and medical benefits	
	Bf212	Bf213	Bf214	Bf215	Bf216	Bf217	Bf218	Bf219	Bf220	Bf221	Bf222	Bf223	Bf224	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1970	54,691.2	36,835.4	29,686.2	7,149.2	1,609.9	8,658.7	3,819.5	38.5	61.1	717.7	62.6	2,950.4	985.0	
1971	66,368.8	43,122.8	35,247.8	7,875.0	1,928.9	10,226.1	6,665.3	49.6	53.0	783.1	68.4	3,550.0	1,090.0	
1972	74,809.4	48,229.1	39,409.9	8,819.2	2,141.2	11,920.4	7,651.0	86.0	42.1	783.7	68.3	3,955.9	1,185.0	
1973	86,165.6	57,766.6	48,287.8	9,478.8	2,477.5	14,010.8	6,065.9	45.2	34.9	848.2	69.8	4,916.5	1,355.0	
1974	99,001.4	66,286.6	54,939.1	11,347.5	2,692.6	16,677.5	6,661.5	25.6	31.5	915.4	70.7	5,710.7	1,610.0	
1975	123,013.1	78,429.9	63,648.5	14,781.4	3,085.1	20,118.6	13,835.9	41.6	32.9	990.0	72.9	6,479.1	2,470.0	
1976	145,703.4	90,440.7	72,663.3	17,777.4	3,499.6	23,441.4	19,585.2	148.2	78.6	1,022.4	75.5	7,487.3	2,205.0	
1977	160,883.3 ¹	105,410.1	83,861.3	21,548.8	3,818.6	26,495.9	15,448.8	107.3	81.8	1,042.2	75.7	8,478.6 ¹	2,530.0	
1978	175,089.6	117,431.9	92,242.7	25,189.2	4,019.8	29,935.8	12,598.4	134.0	73.4	1,124.6	77.7	9,771.7	2,830.5	
1979	194,287.5	131,719.4	102,595.8	29,123.6	4,310.6	33,929.8	11,313.1	86.9	65.6	1,232.2	75.9	11,629.9	3,250.0	
1980	229,754.4	152,110.4	117,118.9	34,991.5	4,768.7	39,490.2	18,326.4	155.4	68.7	1,377.4	49.6	13,457.2	3,725.0	
1981	267,394.8	180,425.0	137,970.2	42,454.8	5,323.4	45,743.7	19,022.3	208.1	60.9	1,596.9	50.3	15,014.5	4,165.0	
1982	302,614.8 ¹	204,567.8	154,144.3	50,423.5	5,766.4	50,464.2	23,256.5	298.8	62.2	1,695.7	52.5	16,503.2	4,640.0	
1983	331,161.2	224,709.2	167,778.9	56,930.3	6,081.5	54,937.5	25,349.7	386.6	61.3	1,766.9	55.7	17,868.5	5,082.0	
1984	341,120.2	238,254.0	175,773.2	62,480.8	6,143.8	58,887.8	16,103.5	183.3	46.7	1,817.7	56.0	19,683.4	6,010.0	
1985	369,595.2	257,535.1	186,150.8	71,384.3	6,275.6	63,044.0	18,343.8	138.4	50.6	1,944.1	55.3	22,263.6	7,080.0	
1986	390,770.1	271,980.0	196,077.4	75,902.6	6,354.5	66,910.8	18,549.6	140.2	57.8	2,067.3	54.7	24,709.9	8,365.9	
1987	412,873.9	286,339.7	204,708.4	81,631.3	6,549.1	72,151.7	18,045.7	124.1	64.9	2,545.4	56.4	27,053.3	9,618.3	
1988	434,051.3	300,048.2	216,438.7	83,609.5	6,675.9	78,051.3	16,117.8	82.1	18.3	2,753.6	62.4	30,303.8	11,110.3	
1989	468,051.7	324,109.5	229,557.5	94,552.0	6,971.2	83,799.9	16,381.3	64.4	35.0	2,886.3	67.3	33,804.1	12,825.0	
1990	513,821.8 ¹	355,264.5	245,555.5	109,709.0	7,229.9	90,391.2	19,973.7	64.6	40.3	3,224.2	62.5	37,633.4	14,305.5	
1991	561,175.2	382,289.8	265,638.8	116,651.0	7,531.8	97,271.3	28,405.3	71.0	23.4	3,879.2	65.8	41,703.4	16,009.5	
1992	618,938.8	416,564.0	284,317.7	132,246.3	7,737.1	103,699.4	41,166.0	67.4	27.5	4,009.4	69.7	45,668.0	17,914.2	
1993	659,209.9	449,276.8	301,183.3	148,093.5	7,920.6	112,559.5	40,720.8	60.3	25.9	3,316.0	53.7	45,330.0	17,712.3	
1994	683,778.7	477,339.7	315,947.0	161,392.7	8,025.2	119,253.1	31,251.1	53.5	29.3	3,200.8	52.1	44,626.0	16,200.0	
1995	705,483.3	495,355.8	331,642.3	164,713.2	8,106.2	128,001.8	26,302.0	48.4	30.0	3,189.1	43.2	43,450.0	16,700.0	

¹ Revised figure. See text for Table Bf188-195.

Sources

Data for 1929–1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929–90* (July 1995); Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1992," *Social Security Bulletin* 58 (2) (1995): 65–73. Data for 1990–1995 are from Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin: Annual Statistical Supplement*, Table 3-A3. See the text for Table Bf188-195 for further discussion of the sources.

Documentation

More information on social insurance programs is available in Tables Bf271–348, Bf377–496, Bf511–567, and Bf735–761. Social insurance programs involve situations where workers and/or employers pay taxes or premiums into funds and are then insured against the specific risk covered by that program. For example, in the Social Security program, workers and employers pay taxes and then are covered so that they receive benefits when they reach retirement age or become disabled. Other programs insure workers against the risk of unemployment, temporary disability, workplace accidents or diseases, and requirements for medical care in old age.

Series Bf213. The sum of series Bf214–215.
Series Bf215, Health Insurance (Medicare). Includes Hospital Insurance and Supplementary Medical Insurance.
Series Bf216, Railroad Retirement. Excludes the financial interchange between Old-Age, Survivors, and Disability Insurance and the Railroad Retirement system.
Series Bf217, Public Employee Retirement. Includes the military retirement system. Excludes refunds of employee contributions, while administrative expenses are not available for some programs.

(continued)

TABLE Bf212–224 Public expenditures on social welfare – social insurance: 1929–1995 *Continued*

Series Bf218, unemployment insurance and employment services. Includes unemployment compensation under state programs, programs for federal employees, trade adjustment and training allowances, and payments under the extended, emergency, disaster, and special unemployment insurance programs.

Series Bf221. State temporary disability insurance programs are found in California, New Jersey, New York, Puerto Rico, and Rhode Island. The programs provide cash and medical benefits for temporary disability. They in-

clude private plans where applicable and state administrative costs. Hawai'i also offers temporary disability insurance, but data on the Hawaiian program are not available.

Series Bf223–224. Workers' compensation expenditures include cash and medical benefits paid under public law by private insurance carriers, state funds, and self-insurers. Administrative costs of private carriers and self-insurers are not available. Beginning in 1969–1970, the series include the federal Black Lung Benefits program.

TABLE Bf225–231 Public expenditures on social welfare – public aid: 1929–1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Public assistance						
	Total	Public assistance			Supplemental	Food Stamps	Other public aid
	Bf225	Bf226	Bf227	Bf228	Bf229	Bf230	Bf231
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1929	60.0	59.9	—	—	—	—	0.1
1930	77.8	77.5	—	—	—	—	0.3
1931	164.0	145.0	—	—	—	—	19.0
1932	255.9	189.9	—	—	—	—	66.0
1933	689.1	344.4	—	—	—	—	344.8
1934	2,530.5	435.9	—	—	—	—	2,094.6
1935	2,997.6	623.9	—	—	—	—	2,373.7
1936	3,079.4	655.8	—	—	—	—	2,423.6
1937	3,436.0	779.5	—	—	—	—	2,656.6
1938	3,232.9	990.9	—	—	—	—	2,242.0
1939	4,229.6	1,102.2	—	—	—	—	3,127.4
1940	3,597.0	1,124.3	—	—	—	—	2,472.7
1941	3,523.7	1,108.2	—	—	—	—	2,415.5
1942	2,777.1	1,061.5	—	—	—	—	1,715.6
1943	1,549.7	1,011.5	—	—	—	—	538.2
1944	1,031.5	1,014.5	—	—	—	—	17.0
1945	1,030.6	1,028.8	—	—	—	—	1.7
1946	1,150.6	1,148.4	—	—	—	—	2.2
1947	1,441.8	1,441.7	—	—	—	—	0.2
1948	1,702.0	1,701.6	—	—	—	—	0.3
1949	2,089.1	2,088.5	—	—	—	—	0.6
1950	2,496.2	2,490.2	51.3	—	—	—	6.0
1951	2,591.7	2,584.9	100.7	—	—	—	6.8
1952	2,584.7	2,584.1	119.1	—	—	—	0.5
1953	2,727.9	2,727.5	154.4	—	—	—	0.4
1954	2,788.2	2,776.3	175.5	—	—	—	11.9
1955	3,003.0	2,941.1	211.9	—	—	—	61.9
1956	3,114.7	3,023.7	252.7	—	—	—	91.0
1957	3,308.5	3,230.6	287.6	—	—	—	77.9
1958	3,615.4	3,539.5	320.2	—	—	—	75.9
1959	3,997.9	3,890.9	410.0	—	—	—	107.0
1960	4,101.1	4,041.7	492.7	—	—	—	59.4
1961	4,444.3	4,301.0	588.9	—	—	—	143.4
1962	4,945.3	4,675.0	812.4	—	—	—	270.3
1963	5,295.9	5,029.0	1,000.8	—	—	—	267.0
1964	5,642.1	5,381.1	1,147.6	—	—	—	261.0
1965	6,283.5	5,874.9	1,367.1	—	—	—	408.5
1966	7,301.1	6,497.0	1,724.9	—	—	—	804.1
1967	8,811.0	7,832.4	2,475.1	—	—	—	978.6
1968	11,091.6	9,886.5	3,723.2	547.3	—	—	1,205.1
1969	13,439.1	11,925.9	4,595.6	554.5	—	—	1,513.2

Notes appear at end of table

(continued)

TABLE Bf225–231 Public expenditures on social welfare – public aid: 1929–1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Total Bf225 Million dollars	Public assistance			Supplemental Security Income Bf229 Million dollars	Food Stamps Bf230 Million dollars	Other public aid Bf231 Million dollars
		Total	Medical payments	Social services			
		Bf226	Bf227	Bf228			
1970	16,487.8	14,433.5	5,212.7	712.6	—	577.0	1,477.3
1971	21,262.0	18,075.0	6,277.5	950.4	—	1,576.3	1,610.7
1972	26,078.2	21,895.0	7,751.6	2,160.5	—	1,866.8	2,316.4
1973	28,691.4	24,002.6	9,208.7	2,306.3	45.7	2,212.9	2,430.2
1974	31,520.4	23,827.4	10,371.9	2,155.1	2,831.5	2,838.9	2,022.6
1975	41,446.6	27,409.4	13,550.6	2,622.4	6,091.6	4,693.9	3,251.7
1976	49,023.4 ¹	31,384.5	15,708.8	2,799.4	6,540.3 ¹	5,699.7	5,398.9
1977	53,812.4	35,376.0	18,351.7	3,216.8	6,818.9	5,472.0	6,145.5
1978	59,925.8	37,360.3	20,471.9	2,840.1	7,193.7	5,139.5	10,232.3
1979	65,307.0	40,497.1	23,491.0	2,725.8	7,532.3	6,816.1	10,461.5
1980	72,703.1	45,064.3	27,570.1	2,342.8	8,226.5	9,083.3	10,329.0
1981	83,634.0	51,744.7	32,492.3	2,489.9	9,288.0	11,136.4	11,464.9
1982	82,206.2	53,860.0	34,804.6	2,567.5	9,753.0	10,761.0	7,832.2
1983	88,330.7	57,181.6	37,180.6	2,507.9	10,793.8	12,540.7	7,814.6
1984	92,979.4	61,906.0	40,194.8	2,788.9	11,136.7	12,375.2	7,561.5
1985	98,361.8	66,170.2	43,859.6 ²	2,742.8	11,840.0	12,512.7	7,838.9
1986	104,200.2	70,839.6	47,242.9	2,670.7	12,887.4	12,397.0	8,076.2
1987	112,115.1 ¹	78,249.2	53,121.4	2,696.8 ¹	13,638.0 ¹	12,362.1	7,865.8
1988	119,723.4	84,152.2	58,039.4	2,700.0	14,687.1	13,071.1	7,813.0
1989	128,609.8	91,290.6	64,548.3	2,670.5	15,823.3	13,589.3	7,906.6
1990	146,811.1	105,093.8	76,175.1	2,753.2	17,230.4	16,254.5	8,232.4
1991	181,334.4	133,664.2	101,909.0	2,822.5	19,646.2	19,471.3	8,552.7
1992	207,953.0	152,018.2	117,622.1	2,707.6	23,423.2	23,232.9	9,278.7
1993	220,999.8	160,625.0	125,138.0	3,712.9	26,506.2	24,496.7	9,371.9
1994	238,025.3	171,755.1	134,204.5	3,645.2	30,085.5	25,273.6	10,911.1
1995	253,530.0	187,219.0	150,869.0	3,729.0	30,138.0	25,319.0	10,854.0

¹ Revised figure. See text for Table Bf188–195.² The data reported in the 1997 and 1999 source articles for the year 1980 is 44,182.7, which does not precisely match the data in the July 1995 source owing to revisions in the procedures for estimating health expenditures.**Sources**

Estimates presented for 1890 and 1913 were based primarily on the following: R. A. Musgrave and J. J. Culbertson, "The Growth of Public Expenditures in the U.S., 1890–1948," *National Tax Journal* (June 1953): 97–115; J. Frederic Dewhurst and Associates, *America's Needs and Resources* (Twentieth Century Fund, 1955); and reports of official agencies. Data for 1929–1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929–90* (July 1995); Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1992," *Social Security Bulletin* 58 (2) (1995): 65–73. Data for 1990–1995 are from Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 88, 94. Most of the series in this table are annually updated in the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3. See the text for Table Bf188–195 for further discussion of the sources.

Documentation

More information on the public aid programs is available in Tables Bf568–678 and Bf689–716.

Series Bf225. Includes cash payments and medical assistance under Aid to Families with Dependent Children (AFDC), Medicaid, emergency assistance, WIC (Women, Infants and Children), General Assistance programs, public assistance, work relief, other emergency aid, surplus food for the needy, food stamps, repatriate and refugee assistance, social services and work incentive activities, and the Job Corps, Neighborhood Youth Corps, and work-experience training programs under the Economic Opportunity Act and related laws. It is the sum of series Bf226 and Bf229–231. Certain other economic opportunity programs are included in series Bf195 as antipoverity programs.

Series Bf226. The figures on public assistance include cash payments and medical assistance under the following programs: AFDC, Medicaid, emergency assistance, WIC, and general assistance from state and local funds. It also includes social services. Beginning in 1969, work incentive program expenditures are included.

Series Bf229. Supplemental Security Insurance (SSI) was established by Congress in 1972, with payments beginning in January 1974. SSI replaced the former federal–state programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled.

Series Bf231. Includes work relief, other emergency aid, surplus food for the needy, repatriate and refugee assistance, work-experience training programs, the WIC program beginning in 1974, and Low-Income Home Energy Assistance beginning in 1981.

TABLE Bf232-245 Public expenditures on social welfare – health and medical programs: 1929-1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Expenditures, by program											Expenditures, by function			
	Under health and medical programs											Total	Health and medical services	Medical research	Medical facilities construction
	Hospital and medical care				Maternal and child health programs			School health (education agencies)		Other public health activities					
Bf232	Bf233	Bf234	Bf235	Bf236	Bf237	Bf238	Bf239	Bf240	Bf241	Bf242	Bf243	Bf244	Bf245		
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars		
1929	351.1	146.3	117.1	29.2	6.2	—	9.4	88.8	100.4	126.0	477.1	372.5	0.0	104.6	
1930	378.1	162.7	133.7	29.0	—	—	9.7	102.3	103.4	134.4	512.5	400.5	0.0	112.0	
1931	405.8	179.1	150.2	29.0	—	0.3	10.1	108.6	107.7	143.4	549.3	431.8	0.3	117.2	
1932	434.5	218.2	187.9	30.3	—	1.6	10.5	115.0	89.2	146.1	580.6	476.2	1.6	102.8	
1933	417.6	232.4	204.5	28.0	—	0.9	10.0	114.6	59.8	128.1	545.9	471.1	0.9	73.9	
1934	400.3	226.3	199.4	26.9	—	0.3	9.3	114.9	49.6	97.4	497.8	444.6	0.3	52.9	
1935	427.2	253.1	225.3	27.7	6.9	0.3	10.0	112.2	44.8	116.0	543.2	495.1	0.3	47.8	
1936	453.9	267.1	237.5	29.7	2.5	0.5	10.6	121.0	52.1	128.4	582.3	526.7	0.5	55.1	
1937	500.1	277.6	245.9	31.7	9.9	1.4	12.1	132.1	66.8	137.7	637.6	560.0	1.4	76.2	
1938	539.5	289.5	255.9	33.6	11.6	1.7	13.5	147.7	75.5	144.9	684.4	597.5	1.7	85.2	
1939	575.2	290.2	255.3	34.9	13.0	2.0	15.0	153.3	101.7	149.0	724.2	609.0	2.0	113.2	
1940	615.5	343.0	297.6	45.4	13.8	2.6	16.4	154.5	85.2	166.1	781.6	679.5	2.6	99.5	
1941	724.4	472.9	315.1	72.4	15.7	2.5	17.8	152.4	62.7	168.1	892.4	822.5	2.5	67.4	
1942	948.7	661.3	311.7	349.6	17.3	2.4	19.2	154.6	93.8	176.8	1,125.4	1,025.0	2.4	98.0	
1943	1,885.8	1,456.3	325.4	1,130.9	17.7	2.6	20.6	177.4	211.2	185.7	2,071.5	1,854.9	2.6	214.0	
1944	2,225.1	1,866.8	335.0	1,531.8	46.7	2.6	21.9	163.4	123.7	203.9	2,429.0	2,297.6	2.6	128.8	
1945	2,354.2	1,995.9	364.8	1,631.1	62.1	2.5	23.3	178.0	92.4	225.2	2,579.4	2,468.2	2.5	108.7	
1946	1,904.1	1,528.6	400.6	1,128.0	53.3	3.5	24.6	230.3	63.8	378.0	2,282.1	2,178.9	3.5	99.7	
1947	1,367.0	963.9	567.6	396.2	35.2	25.6	24.7	260.0	57.7	731.6	2,098.6	1,848.3	27.0	223.3	
1948	1,416.0	941.4	696.3	245.1	30.6	47.0	28.5	287.5	84.6	736.7	2,152.5	1,989.2	49.6	113.7	
1949	1,753.1	1,096.5	782.4	314.1	31.4	60.8	27.7	325.1	211.5	904.4	2,657.4	2,242.4	65.1	349.9	
1950	2,063.5	1,222.3	886.1	336.2	29.8	69.2	30.6	350.8	360.8	1,001.9	3,065.4	2,470.2	72.9	522.3	
1951	2,782.8	1,812.1	980.0	832.0	33.4	79.6	31.2	370.7	455.8	1,030.1	3,812.8	3,162.6	84.6	565.6	
1952	3,331.3	2,207.5	1,087.7	1,119.8	36.5	99.4	31.8	462.1	494.0	1,151.8	4,483.1	3,767.1	103.3	612.7	
1953	3,190.4	2,157.9	1,185.5	972.4	39.9	102.1	45.1	391.6	453.8	1,187.4	4,377.8	3,724.2	107.2	546.4	
1954	3,099.1	2,035.7	1,227.4	808.3	90.1	113.5	58.3	363.9	437.5	1,236.7	4,335.7	3,725.6	118.8	491.3	
1955	3,103.1	2,042.4	1,297.6	744.8	92.9	132.8	65.9	383.7	385.4	1,317.5	4,420.6	3,862.4	138.7	419.5	
1956	3,307.1	2,233.7	1,471.2	762.5	104.2	154.0	73.4	369.6	372.2	1,470.6	4,689.3	4,127.2	161.7	400.4	
1957	3,775.8	2,489.2	1,675.5	813.6	113.3	226.0	79.5	435.0	432.7	1,470.6	5,246.2	4,536.9	238.5	470.8	
1958	4,090.9	2,649.4	1,760.7	888.7	122.1	278.0	85.6	394.5	561.2	1,584.6	5,675.4	4,788.0	291.7	595.7	
1959	4,400.6	2,778.1	1,844.6	933.6	133.4	350.1	93.3	454.1	591.5	1,764.3	6,164.9	5,158.5	367.6	638.8	
1960 ¹	4,463.8	2,853.3	1,973.2	880.1	141.3	448.9	101.0	401.2	518.1	1,931.3	6,395.1	5,346.8	470.6	577.7	
1961	4,927.0	3,150.7	2,226.0	924.7	152.4	576.1	115.0	426.6	506.2	2,131.6	7,058.6	5,895.2	603.2	560.2	
1962	5,229.8	3,138.9	2,132.8	1,006.1	174.1	780.5	129.0	478.1	529.2	2,407.7	7,637.5	6,237.5	818.3	581.7	
1963	5,593.5	3,270.5	2,274.6	995.8	190.3	920.3	128.4	531.5	552.6	2,710.7	8,304.2	6,718.8	963.0	622.4	
1964	6,003.5	3,536.0	2,446.3	1,089.7	211.7	1,042.5	127.7	548.7	536.9	2,967.4	8,970.9	7,261.3	1,096.0	613.6	

Note appears at end of table

(continued)

TABLE Bf232-245 Public expenditures on social welfare – health and medical programs: 1929-1995 *Continued*

Year	Expenditures, by program											Expenditures, by function															
	Under health and medical programs											Total															
	Hospital and medical care			Maternal and child health programs			Medical research		School health (education agencies)		Other public health activities		Medical facility construction		Under other programs		Health and medical services		Medical research		Medical facilities construction						
	Bf233	Bf234	Bf235	Bf236	Bf237	Bf238	Bf239	Bf240	Bf241	Bf242	Bf243	Bf244	Bf245	Bf233	Bf234	Bf235	Bf236	Bf237	Bf238	Bf239	Bf240	Bf241	Bf242	Bf243	Bf244	Bf245	
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1965	6,155.0	3,391.0	2,510.0	881.0	1,227.0	1,400.0	614.0	544.0	3,283.3	9,438.3	7,531.0	1,286.3	621.0														
1966	6,740.0	3,720.0	2,682.0	1,038.0	1,374.0	1,570.0	663.0	552.0	3,843.7	10,583.7	8,505.6	1,442.6	635.5														
1967	7,383.0	3,982.0	2,630.0	1,352.0	1,425.0	1,780.0	832.0	640.0	8,091.7	15,474.7	13,275.6	1,499.1	700.0														
1968	8,172.0	4,300.0	2,759.0	1,541.0	1,617.0	2,050.0	927.0	771.0	11,477.3	19,649.3	17,143.5	1,684.9	820.9														
1969	8,828.0	4,564.0	2,933.0	1,631.0	1,620.0	2,250.0	1,103.0	886.0	13,804.3	22,632.3	19,997.2	1,701.2	933.9														
1970 ¹	9,606.0	4,983.0	3,301.0	1,682.0	1,684.0	2,470.0	1,312.0	930.0	15,357.0	24,963.0	22,186.7	1,775.4	1,000.9														
1971	10,437.0	5,527.0	3,702.0	1,825.0	1,694.0	2,720.0	1,492.0	1,032.0	17,499.7	27,936.7	25,057.7	1,761.9	1,117.1														
1972	11,824.0	6,114.0	4,051.0	2,063.0	1,938.0	2,810.0	1,870.0	1,105.0	20,451.7	32,275.7	29,039.9	2,021.0	1,214.8														
1973	12,799.0	6,910.0	4,591.0	2,319.0	2,173.0	3,000.0	1,925.0	1,017.0	23,068.4	35,867.4	32,483.6	2,262.0	1,121.8														
1974	14,198.0	7,565.0	4,981.0	2,584.0	2,242.0	3,250.0	2,454.0	1,096.0	26,568.8	40,766.8	37,231.9	2,320.0	1,214.9														
1975	16,742.0	8,836.0	6,019.0	2,817.0	2,648.0	3,520.0	2,815.0	1,524.0	34,609.4	51,351.4	46,949.7	2,741.0	1,660.7														
1976	18,356.0	9,993.0	6,136.0	2,857.0	3,307.0	3,690.0	3,272.0	1,801.0	40,043.6	58,399.6	52,985.4	3,401.0	2,013.2														
1977	19,441.0	9,336.0	6,313.0	3,023.0	3,392.0	4,350.0	3,981.0	1,617.0	47,433.2	66,874.2	61,502.0	3,509.8	1,862.4														
1978	22,201.0	10,247.0	6,933.0	3,314.0	4,029.0	4,960.0	5,061.0	1,650.0	54,084.9	76,285.9	70,202.5	4,163.5	1,919.9														
1979	24,040.0	11,363.0	7,681.0	3,682.0	4,271.0	5,190.0	5,640.0	1,468.0	61,930.9	85,970.9	79,825.8	4,401.1	1,744.0														
1980 ¹	27,263.0	12,303.0	8,105.0	4,198.0	4,924.0	5,750.0	6,931.0	1,660.0	72,833.0	100,096.0	93,044.5	5,068.5	1,983.0														
1981	29,588.0	13,376.0	8,536.0	4,840.0	5,193.0	6,120.0	8,062.0	1,424.0	86,452.0	116,040.0	108,852.7	5,328.3	1,859.0														
1982	32,870.0	15,195.0	9,614.0	5,381.0	5,454.0	6,490.0	9,024.0	1,636.0	98,056.5	130,926.5	123,220.9	5,589.3	2,116.3														
1983	34,090.0	15,156.0	9,098.0	6,058.0	5,693.0	6,850.0	9,603.0	1,839.0	108,005.3	142,095.3	133,938.2	5,844.6	2,312.5														
1984	35,722.0	15,608.0	9,260.0	6,348.0	6,273.0	7,260.0	10,460.0	1,562.0	118,019.1	153,741.1	145,150.1	6,463.3	2,127.7														
1985 ¹	39,053.0	16,565.0 ²	9,143.0	7,422.0 ²	6,891.0	7,880.0 ²	11,912.0	1,675.0	132,231.8	171,284.8	162,034.2	7,117.6	2,133.0														
1986	43,953.0	19,474.0	11,275.0	8,199.0	7,561.0	8,420.0	13,245.0	1,455.0	141,866.0	185,819.0	175,999.7	7,747.2	2,072.1														
1987	48,067.0	21,986.0	12,856.0	9,130.0	7,847.0	8,880.0	14,271.0	1,491.0	155,342.8	203,409.8	193,090.5	8,056.5	2,262.8														
1988	53,096.0	23,927.0	14,257.0	9,670.0	9,132.0	9,440.0	15,983.0	1,444.0	164,596.5	217,692.5	205,937.1	9,347.3	2,408.1														
1989	57,123.0	24,584.0	14,426.0	10,158.0	9,800.0	10,280.0 ²	18,261.0	1,675.0	184,155.3	241,278.3	228,922.8	10,034.7	2,320.8														
1990	61,684.0	25,971.0	14,809.0	11,162.0	10,848.0	11,130.0	19,354.0	2,533.0	212,788.0	274,472.0	260,408.0	11,086.0	2,978.0														
1991	65,810.0	28,251.0	15,511.0	12,740.0	11,312.0	11,940.0	20,881.0	2,191.0	248,417.0	314,227.0	299,692.0	11,568.0	2,967.0														
1992	70,114.0	28,664.0	15,895.0	12,769.0	12,599.0	12,300.0	22,980.0	2,535.0	283,060.0	353,174.0	336,925.0	12,869.0	3,380.0														
1993	74,717.0 ²	30,617.0	17,208.0	13,409.0	12,779.0	13,200.0 ²	24,772.0	3,044.0	306,993.0	381,710.0	364,858.0	13,058.0	3,794.0														
1994	80,235.0 ²	31,562.0	18,428.0	13,134.0	13,988.0	14,890.0 ²	27,685.0	3,239.0	328,545.0	408,780.0	390,482.0	14,280.0	4,018.0														
1995	85,507.0	31,904.0	18,482.0	13,422.0	14,982.0	16,670.0	30,808.0	3,798.0	349,568.0	435,075.0	415,424.0	15,271.0	4,380.0														

¹ The data reported in the 1997 and 1999 source articles do not precisely match the data in the July 1995 source, and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 88, 94. Most of the series in this table are annually updated in the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3. See the text for Table Bf188-195 for further discussion of the sources.

² Revised figure. See text for Table Bf188-195.

Sources
 Data for 1929-1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929-90* (July 1995); Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1992," *Social Security Bulletin* 58 (2) (1995): 65-73. Data for 1990-1995 are from Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 88, 94. Most of the series in this table are annually updated in the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3. See the text for Table Bf188-195 for further discussion of the sources.

Documentation
 The U.S. Social Security Administration reports information on health and medical care on the basis of statutory programs and administrative structure, rather than strictly by function; therefore, all health and medical expenditures are not reported under the category health and medical programs in the reporting of the Social Welfare Expenditures.

TABLE Bf232–245 Public expenditures on social welfare – health and medical programs: 1929–1995 *Continued*

Series Bf232. The sum of series Bf233 and Bf236–240. The estimates for health and medical programs are derived from the Census of Governments and the U.S. Budget. They include net public expenditures for hospital and medical care (after deduction of fee payments), hospital construction, school health, community and related public health services, and maternal and child health services. They exclude state and local expenditures for domiciliary care in institutions other than mental and tuberculosis. They also exclude expenditures for health and medical services provided in connection with Old-Age, Survivors, Disability, and Health Insurance, state temporary disability insurance, workers' compensation, public assistance, vocational rehabilitation, and veterans' and antipoverty programs; these are included in the total expenditures shown for those programs. Also excluded are international health activities. Omitted from the health category, but included under education in Table Bf255–262, are expenditures for medical schools and other health training institutions.

Series Bf233. The sum of series Bf234–235.

Series Bf235. Includes medical care for military dependents.

Series Bf236. Includes services for disabled children.

Series Bf241. Sums the expenditures listed under other administrative structures, including expenditures on Medicare, series Bf215; health and medical benefits under state temporary disability insurance, series Bf222; workers' compensation health and medical benefits, series Bf224; public assistance medical payments, series Bf227; veterans' hospital and medical care, series Bf249; veterans' hospital construction, series Bf250; veterans' medical and prosthetic research, series Bf251; and vocational rehabilitation spending on medical services and medical research, series Bf265–266.

Series Bf242. Includes health and medical expenditures under all public programs. This series is the sum of series Bf232 and Bf241. It is also the sum of series Bf243–245 (see Bixby 1995, p. 73). When comparing the two sets of sums, there are some rounding errors in some years. In 1992 through 1994, there are some discrepancies between the two sums greater than \$0.2 million but smaller than 0.02 percent of the value of the series.

Series Bf243, expenditures on health and medical services. The series is the sum of expenditures under the following: medicare, series Bf215; state temporary disability insurance spending on health and medical benefits, series Bf222; workers' compensation spending on health and medical care, series Bf224; public assistance medical payments, series Bf227; hospital and medical care for civilians, series Bf234; hospital and medical care under the Defense Department, series Bf235; maternal and child health programs, series Bf236; other public health activities, series Bf239; veterans' hospital and medical care, series Bf249; medical vocational rehabilitation, series Bf265; and school health expenditures by education agencies (series not listed in education tables).

Series Bf244, medical research expenditures. The series is the sum of expenditures under the following: health and medical programs, series Bf237; veterans' programs, series Bf251; and vocational rehabilitation, series Bf266.

Series Bf245, medical facilities construction. The series is the sum of spending under both health and medical programs and veterans' programs, series Bf240 and Bf250.

TABLE Bf246–254 Public expenditures on social welfare – veterans' programs: 1929–1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Health and medical programs								Welfare and other
	Total	Pensions and compensation	Total	Hospital and medical care	Hospital construction	Medical and prosthetic research	Education	Life insurance	
	Bf246	Bf247	Bf248	Bf249	Bf250	Bf251	Bf252	Bf253	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1929	657.9	434.7	50.9	46.7	4.2	—	—	136.4	35.8
1930	667.8	433.4	59.4	50.7	8.6	—	—	140.0	35.0
1931	744.3	504.4	68.3	58.7	9.5	—	—	137.7	34.0
1932	825.0	562.2	77.8	64.3	13.6	—	—	146.0	39.0
1933	818.8	565.0	69.9	55.8	14.1	—	—	145.3	38.6
1934	529.5	333.0	42.2	38.9	3.3	—	—	124.6	29.8
1935	597.5	386.5	50.8	47.8	3.0	—	—	122.8	37.5
1936	3,825.5	411.3	55.1	52.1	3.0	—	—	117.7	3,241.4
1937	892.7 ¹	409.0	62.1	52.8	9.4	—	—	113.1	308.4
1938	627.3	415.2	64.6	54.8	9.7	—	—	107.8	39.8
1939	606.1	429.7	68.6	57.2	11.5	—	—	76.3	31.3
1940	629.0	443.3	75.8	61.5	14.3	—	—	77.0	32.9
1941	612.9	448.4	69.9	65.1	4.7	—	—	68.7	25.8
1942	645.4	445.7	72.4	68.2	4.2	—	—	60.4	67.0
1943	623.3	457.8	75.1	72.3	2.8	—	—	67.0	23.3
1944	720.0	513.1	87.0	82.0	5.1	—	—	93.7	26.2
1945	1,125.8	766.6	101.8	85.5	16.3	—	9.8	201.2	46.4
1946	2,402.9	1,279.5	243.8	207.9	35.9	—	368.9	376.0	134.7
1947	5,682.5	1,834.4	578.0	411.1	165.6	1.4	2,273.3	440.9	556.0
1948	6,638.2	1,910.6	563.5	531.8	29.1	2.6	2,630.2	433.1	1,100.8
1949	6,926.7	1,980.1	718.2	575.5	138.4	4.3	2,817.9	452.3	958.2
1950	6,865.7	2,092.1	748.0	582.8	161.5	3.7	2,691.6	475.7	858.3
1951	5,996.0	2,113.8	695.8	581.0	109.8	5.0	2,019.3	515.0	652.1
1952	5,255.6	2,183.7	766.7	644.2	118.7	3.9	1,380.7	554.9	369.6
1953	4,734.7	2,448.6	739.2	641.5	92.6	5.1	706.8	538.8	301.4
1954	4,630.9	2,507.1	739.9	680.8	53.8	5.3	596.4	538.1	249.4

Note appears at end of table

(continued)

TABLE Bf246-254 Public expenditures on social welfare – veterans' programs: 1929-1995 *Continued*

Year	Health and medical programs									
	Total	Pensions and compensation	Hospital and medical care			Medical and prosthetic research	Education	Life insurance	Welfare and other	
	Bf246	Bf247	Total	Bf248	Bf249	Hospital construction	Bf250	Bf251	Bf252	Bf253
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1955	4,833.5	2,689.7	761.1	721.5	34.1	5.6	706.1	490.2	186.5	
1956	5,061.2	2,805.4	759.9	725.2	28.2	6.5	809.5	476.2	210.2	
1957	5,118.8	2,886.4	786.9	738.4	38.1	10.4	816.2	476.9	152.5	
1958	5,426.7	3,126.7	843.8	799.3	34.5	10.0	736.9	490.0	229.3	
1959	5,472.3	3,303.9	904.5	844.4	47.3	12.8	608.7	485.6	169.6	
1960	5,479.2	3,402.7	954.0	879.4	59.6	15.1	409.6	494.1	218.8	
1961	5,623.7	3,664.8	1,019.9	947.4	54.0	18.4	257.6	492.7	188.9	
1962	5,654.1	3,749.1	1,041.3	962.0	52.5	26.8	157.2	499.5	207.1	
1963	5,751.2	3,912.6	1,112.7	1,013.0	69.8	29.9	100.8	489.4	135.7	
1964	5,861.5	4,001.7	1,172.8	1,063.0	76.7	33.2	69.6	471.6	145.7	
1965	6,031.1	4,141.4	1,228.7	1,114.8	77.0	36.9 ¹	40.9	434.3	185.8	
1966	6,358.3	4,409.3	1,285.1	1,160.9	83.5	40.7	34.4	442.1	187.4	
1967	6,898.3	4,499.4	1,358.8	1,251.7	60.0	47.1	296.9	548.4	194.8	
1968	7,246.7	4,644.1	1,438.7	1,342.5	49.9	46.3	465.7	503.8	194.4	
1969	7,933.6	4,987.0	1,530.9	1,430.8	47.9	52.2	679.4	492.9	243.4	
1970	9,078.1	5,393.8	1,784.1	1,651.4	70.9	61.8	1,018.5	502.3	379.4	
1971	10,455.0 ¹	5,877.5	2,026.0 ¹	1,873.0	85.1	67.9	1,622.4	526.6	407.5	
1972	11,522.3	6,209.3	2,431.4	2,255.6	109.8	66.0	1,924.6	523.7	433.3	
1973	13,026.4	6,605.8	2,766.1	2,587.3	104.8	74.0	2,647.9	532.2	474.4	
1974	14,112.4	6,777.4	2,983.5	2,786.6	118.9	78.0	3,206.9	538.5	606.2	
1975	17,018.9	7,578.5	3,516.8	3,287.1	136.7	93.0	4,433.8	556.1	933.7	
1976	18,958.0	8,279.7	4,060.9	3,754.7	212.2	94.0	5,350.6	564.3	702.5	
1977	19,014.3	9,081.9	4,670.6	4,321.2	245.4	104.0	3,925.5	607.2	729.1	
1978	19,744.0	9,676.5	5,237.5	4,855.6	269.9	112.0	3,405.6	614.3	810.1	
1979	20,601.6	10,578.2	5,700.9	5,307.9	276.0	117.0	2,794.1	638.2	890.2	
1980	21,465.5	11,306.0	6,203.9	5,749.9	323.0	131.0	2,400.7	664.5	890.4	
1981	23,440.9	12,453.6	6,999.6	6,429.3	435.0	135.3	2,335.6	709.0	943.1	
1982	24,708.1	13,301.6	7,825.8	7,210.2	480.3	135.3	1,816.3	747.0	1,017.4	
1983	25,801.9	13,894.9	8,387.7	7,762.6	473.5	151.6	1,707.5	744.0	1,067.8	
1984	26,274.9	14,050.5	8,935.9	8,179.9	565.7	190.3	1,402.0	719.0	1,167.5	
1985	27,041.7 ¹	14,333.0	9,492.6 ¹	8,808.0	458.0	226.6	1,170.8	795.5	1,249.8	
1986	27,444.9	14,493.2	9,923.1	9,119.8	617.1	186.2	866.8	893.0	1,268.8	
1987	28,050.8	14,522.1	10,503.0	9,521.7	771.8	209.5	742.2	937.9	1,345.6	
1988	29,663.4	14,913.9	11,331.0	10,151.5	964.1	215.3	653.0	963.1	1,802.4	
1989	30,103.7	15,279.2	11,662.9	10,782.3	645.8	234.7	647.3	1,002.2	1,512.1	
1990	30,916.2	15,792.6	12,004.1	11,321.4	445.0	237.7	522.8	1,037.8	1,558.9	
1991	32,857.3	16,284.3	13,221.5	12,189.6	776.4	255.5	569.5	1,039.3	1,742.7	
1992	35,642.0	16,539.3	15,442.0	13,451.8	844.9	270.4	772.0	1,113.7	1,775.0	
1993	36,378.3	17,205.2	15,410.5	14,382.5	749.6	278.6	937.7	904.7	1,920.2	
1994	37,984.8	17,481.0	16,231.4	15,089.5	778.8	292.3	1,098.3	971.5	2,112.6	
1995	39,072.0	18,070.4	16,654.4	15,714.0	581.9	289.1	1,118.2	946.3	2,282.7	

¹ Revised figure. See text for Table Bf188-195.

Sources

Data for 1929-1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929-90* (July 1995); Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1992," *Social Security Bulletin* 58 (2) (1995): 65-73. Data for 1990-1995 are from Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1994," *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, "Public Social Welfare Expenditures, Fiscal Year 1995," *Social Security Bulletin* 62 (2) (1999): 88. Most of the series in this table are annually updated in the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3. See the text for Table Bf188-195 for further discussion of the sources.

Documentation

The estimates for veterans programs were obtained from the *Annual Report of Veterans Administration*, supplemented by unpublished data.

Series Bf246. The sum of series Bf247-248 and Bf252-254.

Series Bf247 and Bf252. Series Bf247 includes burial awards and, beginning in 1965, subsistence payments to disabled veterans undergoing training and special allowances for survivors of veterans who did not qualify under Old-Age, Survivors, Disability, and Health Insurance. Beginning in 1973-1974, subsistence payments to disabled veterans undergoing training shifted from the pensions and compensation to the education series.

Series Bf248. The sum of series Bf249-251.

Series Bf253. Excludes the service persons' group life insurance program.

Series Bf254. The most unusual increase in the series came when Congress voted to pay a "veterans' bonus" in 1936 over Franklin Roosevelt's veto. The bonus provided for the immediate payment to veterans of World War I of their adjusted compensation certificates, which were supposed to come due in 1945.

TABLE Bf255-262 Public expenditures on social welfare – education and housing: 1929-1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Education						Housing		
	Total	Elementary and secondary education			Higher education		Vocational and adult education	Total	Public housing
		Total	Construction		Total	Construction			
		Bf255	Bf256	Bf257	Bf258	Bf259			
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1929	2,433.7	2,216.2	377.0	182.1	0.2	34.9	—	—	
1930	2,522.8	2,288.2	370.9	196.1	30.9	37.9	—	—	
1931	2,439.6	2,217.5	290.9	180.4	—	41.1	—	—	
1932	2,351.8	2,144.4	202.0	164.3	0.9	42.4	—	—	
1933	2,104.0	1,911.1	135.1	153.1	—	39.2	—	—	
1934	1,913.8	1,732.8	112.5	143.2	14.4	37.3	0.4	0.4	
1935	2,007.5	1,820.1	123.3	147.9	—	39.1	13.2	13.2	
1936	2,227.6	2,012.5	255.0	154.8	—	50.8	41.7	41.7	
1937	2,375.7	2,143.8	288.8	177.5	—	53.9	3.1	3.1	
1938	2,563.0	2,296.6	355.9	199.3	19.4	66.6	3.9	3.9	
1939	2,503.7	2,221.4	248.4	208.6	20.0	73.0	3.4	3.4	
1940	2,561.2	2,267.4	258.0	217.6	20.6	75.4	4.2	4.2	
1941	2,617.2	2,255.2	197.8	225.9	17.1	135.2	8.9	8.9	
1942	2,694.2	2,262.8	138.2	251.0	13.6	178.7	14.3	14.3	
1943	2,793.3	2,324.4	95.8	269.3	12.4	197.8	13.6	13.6	
1944	2,800.4	2,392.2	53.9	261.5	11.3	144.4	13.3	13.3	
1945	3,076.3	2,620.6	82.5	314.4	42.3	139.2	11.1	11.1	
1946	3,296.8	2,834.0	111.1	363.5	73.5	97.9	158.7	158.7	
1947	4,089.0	3,479.1	263.2	497.2	130.5	111.3	280.9	280.9	
1948	4,897.3	4,130.1	413.7	633.6	191.0	131.7	27.3	27.3	
1949	5,806.6	4,889.5	719.8	769.1	245.8	145.6	7.7	7.7	
1950	6,674.1	5,596.2	1,019.4	914.7	310.3	160.8	14.6	14.5	
1951	7,415.1	6,329.9	1,251.5	912.4	234.3	169.9	35.0	21.4	
1952	8,245.7	7,115.0	1,483.6	947.9	161.7	179.0	37.1	25.0	
1953	9,230.9	8,034.4	1,774.2	1,012.9	155.1	178.5	50.6	37.9	
1954	10,084.4	8,815.5	2,066.4	1,081.5	146.9	183.9	67.4	53.8	
1955	11,157.2	9,734.3	2,231.9	1,214.4	198.6	204.9	89.3	74.7	
1956	12,154.4	10,578.8	2,395.5	1,349.9	244.4	221.9	111.7	92.0	
1957	13,732.3	11,856.5	2,629.6	1,628.8	333.0	241.2	120.2	101.2	
1958	15,312.6	13,150.8	2,868.1	1,893.0	423.9	261.1	134.2	110.6	
1959	16,498.3	14,139.1	2,757.3	2,062.5	389.7	283.2	156.2	127.8	
1960	17,626.2	15,109.0	2,661.8	2,190.7	357.9	298.0	176.8	143.5	
1961	19,337.2	16,448.4	2,762.0	2,546.0	458.8	316.5	196.1	159.2	
1962	21,004.6	17,743.6	2,862.2	2,877.7	554.8	353.7	216.6	173.3	
1963	22,670.7	18,915.5	2,920.1	3,299.6	653.8	420.6	248.1	191.4	
1964	24,989.0	20,688.1	2,978.0	3,740.0	703.0	512.9	277.7	206.5	
1965	28,107.8	22,357.7	3,267.0	4,826.4	1,081.4	853.9	318.1	234.5	
1966	32,825.1	25,566.0	3,754.9	6,023.7	1,482.3	1,108.1	334.9	249.2	
1967	35,807.8	27,741.5	3,970.4	6,628.9	1,439.2	1,296.1	377.8	275.8	
1968	40,589.7	31,675.4	4,255.8	7,327.7	1,323.1	1,435.3	427.6	293.7	
1969	43,673.1	33,705.3	4,654.1	8,173.9	1,447.0	1,648.3	532.3	360.1	
1970	50,845.5	38,632.3	4,659.1	9,907.0	1,566.9	2,144.4	701.2	459.9	
1971	56,704.7	42,910.8	4,551.9	10,834.9	1,565.5	2,718.1	1,046.2	608.2	
1972	59,385.1	44,524.1	4,458.9	11,582.6	1,481.9	3,021.0	1,332.4	731.1	
1973	64,733.7	48,076.9	5,008.4	12,940.0	1,483.2	3,453.9	2,179.6	1,101.9	
1974	70,533.9	52,459.2	4,978.9	13,955.8	1,386.3	3,880.4	2,554.0	1,233.1	
1975	80,834.1	59,745.6	5,746.0	16,384.1	1,512.7	4,441.3	3,171.7	1,456.4	
1976	87,729.7	63,234.9	5,920.1	18,741.9	1,557.7	5,504.9	3,370.8	1,716.0	
1977	93,878.3	68,218.5	6,235.1	20,034.4	1,505.7	5,312.0	4,358.1	2,763.5	
1978	101,517.8	73,133.1	5,245.2	21,893.3	1,458.5	6,133.3	5,224.7	3,626.0	
1979	109,261.5	77,714.6	5,449.3	24,129.8	1,417.4	7,029.4	5,493.1	3,775.8	
1980	121,049.6	87,149.9	6,524.0	26,175.9	1,528.1	7,375.2	6,879.0	4,680.6	
1981	130,108.5	92,327.7	6,756.9	29,615.2	1,751.6	7,854.9	6,733.5	4,587.3	
1982	138,089.3	97,419.5	6,772.2	32,369.1	1,991.7	7,997.2	9,202.1	6,643.5	
1983	146,415.4	102,651.7	7,199.5	35,067.7	2,058.6	8,386.4	10,963.5	7,594.3	
1984	157,188.9	110,066.7	7,258.0	37,796.8	1,962.4	9,069.4	11,531.8	8,408.2	

(continued)

TABLE Bf255–262 Public expenditures on social welfare – education and housing: 1929–1995 *Continued*

Year	Education						Housing	
	Total	Elementary and secondary education			Higher education		Vocational and adult education	Public housing
		Total	Construction		Total	Construction		
	Bf255	Bf256	Bf257	Bf258	Bf259	Bf260	Bf261	Bf262
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1985	172,047.5	120,696.6	8,358.0	41,130.4	2,346.6	9,891.2	12,598.5	9,340.3
1986	189,234.6	142,721.9	10,009.0	45,033.1	2,638.0	1,207.6	11,961.8	8,350.0
1987	204,563.7	154,917.5	11,325.0	48,022.1	3,086.9	1,247.4	13,173.5	9,230.7
1988	219,382.2	167,834.9	11,789.0	49,898.3	3,199.3	1,288.0	16,555.9	12,176.5
1989	238,771.0	183,170.7	14,584.0	54,028.5	3,313.0	1,209.2	18,126.7	13,210.9
1990	258,331.6	199,224.3	10,636.0	57,424.3	3,953.0	1,293.3	19,468.5	14,521.8
1991	277,147.1	215,798.8	12,363.0	59,582.6	3,981.1	1,314.3	21,522.6	16,177.4
1992	292,070.6	226,905.4	14,681.0	63,259.9	4,869.5	1,451.8	20,617.2	15,302.0
1993	331,996.8	252,506.5	22,288.0	77,558.1	8,990.3	1,494.9	20,782.3	15,302.0
1994	344,091.0	261,006.2	19,692.8	81,091.2	9,891.8	1,503.8	27,032.0	24,724.4
1995	365,625.3	277,874.5	24,809.9	85,743.8	10,490.3	1,508.0	29,361.1	24,724.4

Sources

Data for 1929–1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929–90* (July 1995); Ann Kallman Bixby, “Public Social Welfare Expenditures, Fiscal Year 1992,” *Social Security Bulletin* 58 (2) (1995): 65–73. Data for 1990–1995 come from Ann Kallman Bixby, “Public Social Welfare Expenditures, Fiscal Year 1994,” *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, “Public Social Welfare Expenditures, Fiscal Year 1995,” *Social Security Bulletin* 62 (2) (1999): 88. Most of the series in this table are annually updated in the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3. See the text for Table Bf188–195 for further discussion of the sources.

Documentation

The primary basis for the education estimates are the various federal and state expenditures series compiled by the U.S. Office of Education and appearing in the annual editions of the *Digest of Educational Statistics*. Data from these sources, however, are adjusted to fit the conceptual framework for these social welfare expenditures series. For example, the latter omit the various student and school construction loan programs and certain research and development expenditures that have subordinate educational objectives. Also excluded are inhouse training programs conducted outside of educational institutions and expenditures for international education (except for U.S.-operated schools abroad).

In addition, certain programs included in the U.S. Office of Education series, such as veterans’ benefits, manpower and training programs, school

meals, and health-related research facilities, are included elsewhere in the social welfare expenditures series and are therefore not included as education expenditures.

Series Bf255–260. The education data include public expenditures for support, maintenance, and operation of local, state, and federal elementary–secondary, vocational, adult, and higher education institutions.

Series Bf255, public expenditures on education. The sum of series Bf256, Bf258, and Bf260. Includes expenditures for the support of students, the construction of educational facilities, and the administrative operations of state and local departments of education and the U.S. Office of Education. Federal administrative expenditures (U.S. Department of Education) and research costs are included only in total spending, series Bf255. State and local expenditures for vocational and adult education are not available after 1985.

Series Bf261. The data on housing expenditures are supplied principally by the U.S. Department of Housing and Urban Development and confined to outlays for housing owned or operated by a public body (“public housing”) and to programs designed to provide subsidized housing for low- and moderate-income families (for example, rent supplements, homeownership and rental housing assistance, and rehabilitation grants). Excluded from the series are urban renewal and city demonstration programs, as well as mortgage and loan insurance programs and programs providing credit facilities for home-financing institutions.

TABLE Bf263–270 Public expenditures on social welfare – other programs: 1929–1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Vocational rehabilitation						Special OEO and ACTION programs	Social welfare, not elsewhere classified
	Total	Total	Medical care	Medical research	Child nutrition	Child welfare		
	Bf263	Bf264	Bf265	Bf266	Bf267	Bf268		
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars		
1929	76.2	1.6	0.1	—	—	—	—	74.7
1930	77.5	1.8	0.1	—	—	—	—	75.7
1931	78.8	2.1	0.2	—	—	—	—	76.7
1932	80.9	2.3	0.2	—	—	—	—	78.7
1933	88.8	2.2	0.2	—	—	—	—	86.6
1934	95.8	2.1	0.2	—	—	—	—	93.7
1935	99.0	2.3	0.2	—	—	26.0	—	70.7
1936	100.5	2.7	0.3	—	0.2	26.1	—	71.5
1937	105.4	3.4	0.5	—	0.2	35.4	—	66.4
1938	108.2	4.0	0.4	—	0.6	47.6	—	56.1
1939	113.8	4.1	0.3	—	1.3	46.4	—	62.0
1940	116.4	4.2	0.3	—	4.0	45.0	—	63.3
1941	136.4	4.8	0.3	—	13.7	43.6	—	74.3
1942	153.9	5.3	0.4	—	23.3	42.1	—	83.1
1943	158.6	5.7	0.6	—	23.4	46.2	—	83.4
1944	181.6	6.6	0.8	—	34.4	50.2	—	90.5
1945	197.9	10.2	1.4	—	47.4	55.5	—	84.9
1946	232.7	14.2	2.2	—	57.1	60.7	—	100.7
1947	315.6	20.0	3.5	—	100.3	79.3	—	116.0
1948	368.8	25.1	5.2	—	117.1	98.5	—	128.1
1949	395.9	26.5	6.2	—	131.8	101.9	—	135.7
1950	447.7	30.0	7.4	—	160.2	104.9	—	152.6
1951	461.9	31.0	7.8	—	166.0	108.4	—	156.4
1952	451.0	33.4	8.7	—	154.2	113.4	—	149.9
1953	503.0	35.2	8.9	—	191.9	120.5	—	155.3
1954	612.1	36.7	8.7	—	240.3	126.2	—	208.9
1955	619.0	42.4	9.1	0.3	239.6	135.1	—	201.8
1956	735.4	56.3	11.0	1.2	294.4	145.6	—	239.1
1957	823.0	66.5	12.7	2.1	364.0	159.7	—	232.8
1958	920.4	77.8	15.0	3.7	325.4	176.4	—	340.8
1959	1,009.6	86.9	16.7	4.7	368.4	184.8	—	369.4
1960	1,139.4	96.3	17.7	6.6	398.7	211.5	—	432.9
1961	1,342.8	109.0	20.4	8.7	405.5	224.5	—	603.7
1962	1,414.5	128.6	22.5	11.0	463.7	246.6	—	575.5
1963	1,593.4	148.5	26.0	12.8	479.8	268.8	—	696.3
1964	1,746.0	182.4	31.2	20.3	521.6	314.6	—	727.4
1965	2,065.6	210.4	34.2	22.4	617.4	354.3	51.7	831.8
1966	2,308.8	298.6	47.9	27.9	537.4	400.5	287.3	785.0
1967	2,848.5	410.2	67.5	27.0	588.5	453.3	451.7	944.8
1968	3,285.4	466.0	102.0	21.6	705.9	505.6	608.1	999.8
1969	3,792.5	583.1	118.4	29.0	743.1	566.6	663.3	1,236.4
1970	4,145.3	703.7	133.8	29.6	896.0	585.4	752.8	1,207.4
1971	4,983.0	800.8	162.8	—	1,204.5	596.8	784.9	1,596.0
1972	5,363.8	875.4	179.2	17.0	1,502.4	532.0	782.7	1,671.3
1973	5,698.2	911.7	175.0	15.0	1,707.0	526.0	894.9	1,658.6
1974	6,721.5	967.5	185.2	—	2,025.8	510.0	766.7	2,451.5
1975	6,946.6	1,036.4	217.7	—	2,517.6	597.0	638.3	2,157.3
1976	8,472.5	1,189.7	216.0	—	2,806.3	752.6	572.1	3,151.8
1977	9,071.4	1,251.9	242.6	13.8	3,268.3	810.0	748.7	2,992.5
1978	10,562.7	1,297.6	255.6	22.5	3,584.9	800.0	881.4	3,998.8
1979	11,076.2	1,309.2	276.4	13.1	4,374.6	800.0	896.9	3,695.5
1980	13,599.1	1,251.1	279.4	13.5	4,852.3	800.0	2,302.7	4,393.0
1981	11,983.1	1,195.1	290.0	—	4,870.7	172.7	814.5	4,930.1
1982	11,654.4	1,233.7	310.1	—	4,490.6	160.2	521.5	5,248.4
1983	12,466.4	1,333.2	369.0	—	4,981.4	160.1	457.4	5,534.3
1984	13,294.9	1,447.7	341.6	—	5,198.9	165.0	479.1	6,004.2

Note appears at end of table

(continued)

TABLE Bf263–270 Public expenditures on social welfare – other programs: 1929–1995 *Continued*

Year	Vocational rehabilitation						Special OEO and ACTION programs	Social welfare, not elsewhere classified
	Total	Total	Medical care	Medical research	Child nutrition	Child welfare		
	Bf263	Bf264	Bf265	Bf266	Bf267	Bf268		
Year	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1985	13,551.8	1,536.7	360.0	—	5,308.5	200.0	503.8	6,002.8
1986	14,160.6	1,615.9	376.8	—	5,676.7	197.9	504.5	6,165.6
1987	15,277.9	1,773.4	412.4	—	6,230.6	222.5	519.6	6,531.8
1988	15,479.0	1,905.5	444.0	—	6,250.0	239.4	153.3	6,930.8
1989	16,608.7	1,999.0	499.9	—	6,644.9	246.7	162.9	7,555.2
1990	17,917.6	2,126.6	531.6	—	7,165.4	252.6	169.4	8,203.6
1991	19,779.8 ¹	2,235.8	559.0	—	7,966.9	273.9	191.9	9,111.3
1992	21,531.5	2,446.8	611.7	—	8,775.8	273.9	193.8	9,841.2
1993	22,670.0	2,379.1	594.8	—	9,392.4	294.6	208.3	10,395.6
1994	24,762.5	2,560.1	640.0	—	10,099.1	294.6	204.4	11,604.3
1995	26,557.7	2,630.3	658.0	—	10,653.4	292.0	222.0	12,760.0

¹ Revised figure. See text for Table Bf188–195.

Sources

Data for 1929–1989, U.S. Social Security Administration, *Social Welfare Expenditures under Public Programs in the United States, 1929–90* (July 1995); Ann Kallman Bixby, “Public Social Welfare Expenditures, Fiscal Year 1992,” *Social Security Bulletin* 58 (2) (1995): 65–73. Data for 1990–1993, *Social Security Bulletin: Annual Statistical Supplement* (1996), Table 3.A3, p. 141; for 1994–1995, *Social Security Bulletin: Annual Statistical Supplement* (1999), Table 3.A3, p. 139. Information for the 1990s on series Bf265 is from Ann Kallman Bixby, “Public Social Welfare Expenditures, Fiscal Year 1994,” *Social Security Bulletin* 60 (3) (1997): 42; and Ann Kallman Bixby, “Public Social Welfare Expenditures, Fiscal Year 1995,” *Social Security Bulletin* 62 (2) (1999): 88. The series in this table are annually updated in the *Social Security Bulletin: Annual Statistical Supplement*, Table 3.A3. See the text for Table Bf188–195 for further discussion of the sources.

Documentation

Series Bf263. The sum of series Bf264 and Bf267–270.

Series Bf264, vocational rehabilitation. Includes vocational rehabilitation spending on medical services and research, series Bf265–266. Vocational rehabilitation spending on medical research is no longer available separately after 1980.

Series Bf267, child nutrition. Includes surplus food for schools and programs under the National School Lunch and Child Nutrition Acts.

Series Bf268, child welfare. Represents primarily child welfare services under the Social Security Act. State and local data on child welfare spending are not available after 1980. Beginning in 1968–1969, administrative expenditures are excluded.

Series Bf269, U.S. Office of Economic Opportunity (OEO) and ACTION programs. Includes domestic programs consolidated in 1972 under ACTION (VISTA, foster grandparents, and other domestic volunteer programs) and special OEO programs. After 1987, represents ACTION funds only.

Series Bf270, social welfare spending, not elsewhere classified. Federal expenditures include spending on the following: institutional care primarily in the form of surplus food for institutions; the administrative and related expenses of the Secretary of Health and Human Services; Indian welfare and guidance; aging and juvenile delinquency; and certain manpower and human development programs. State and local expenditures include amounts for institutional care, anti-poverty and manpower programs, day care, child placement and adoption services, foster care, legal assistance, care of transients, and other unspecified welfare services. In the original source, spending on institutional care is reported separately from social welfare spending, not elsewhere classified. However, there was a definitional change such that the information on state and local spending on anti-poverty programs, foster care, legal assistance to the needy, and care of transients that was listed under spending on institutional care prior to 1970 was moved to the category social welfare spending not elsewhere classified after 1969. To ensure consistency, the data are presented as a combined series here.

SOCIAL WELFARE PROGRAMS

Price V. Fishback and Melissa A. Thomasson

TABLE Bf271–283 Employment covered under selected government social insurance programs – estimated payrolls: 1937–1996

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Total earnings in employment, including self- employment	Wage and salary disbursements		Wages and salaries in employment covered by retirement programs					Net earnings of self- employed covered by OASDHI	Wages and salaries in civilian employment covered by other programs			
		Total	Civilian	Total	OASDHI	Railroad	Federal civil service	State and local government		Unemployment insurance			
										Total	State programs	Railroad	Workers? compensation
		Bf271	Bf272	Bf273	Bf274 ^{1, 2}	Bf275 ³	Bf276 ³	Bf277		Bf278	Bf279	Bf280	Bf281
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1937	57,624	44,421	44,067	37,943	32,770	2,265	1,050	1,858	—	—	—	2,265	—
1938	52,157	40,860	40,495	33,755	28,635	2,010	1,139	1,971	—	28,210	26,200	2,010	—
1939	55,901	44,056	43,668	36,892	31,488	2,149	1,221	2,034	—	31,218	29,069	2,149	—
1940	81,272	48,227	47,664	41,660	35,600	2,280	1,430	2,350	—	34,632	32,352	2,280	35,500
1941	78,369	60,862	58,996	52,499	45,300	2,697	1,912	2,590	—	44,682	41,985	2,697	—
1942	105,347	81,516	75,348	67,714	58,000	3,394	3,600	2,720	—	57,942	54,548	3,394	—
1943	134,159	105,527	91,394	81,640	69,400	4,100	5,100	3,040	—	69,971	65,871	4,100	—
1944	146,763	116,942	96,909	86,443	73,100	4,523	5,600	3,220	—	73,409	68,886	4,523	—
1945	148,901	117,479	95,660	85,438	71,300	4,530	5,840	3,768	—	70,941	66,411	4,530	74,000
1946	148,700	112,000	104,200	93,618 ⁴	79,000	4,883 ⁴	5,195 ⁴	5,500	—	78,300	73,400	4,883 ⁴	80,000
1947	159,000	123,100	118,900	107,462 ⁴	92,100	5,113 ⁴	4,809 ⁴	5,440 ⁴	—	91,700	86,600	5,113 ⁴	91,500
1948	176,400	135,500	131,400	118,458 ⁴	101,900	5,539 ⁴	4,469 ⁴	6,550 ⁴	—	101,600	96,100	5,539 ⁴	105,000
1949	171,100	134,800	130,300	117,780 ⁴	99,600	5,133 ⁴	5,707 ⁴	7,340 ⁴	—	99,000	93,900	5,133 ⁴	103,000
1950	185,700	147,000	141,700	128,900	109,400	5,327 ⁴	6,068 ⁴	8,000	—	108,400	103,100	5,327 ⁴	113,500
1951	214,500	171,300	162,300	152,576 ⁴	131,200	6,101 ⁴	6,395 ⁴	8,900	16,300	123,800	118,700	6,101 ⁴	131,500
1952	228,700	185,400	174,600	164,734 ⁴	135,200	6,185 ⁴	6,929 ⁴	9,820 ⁴	16,300	134,700	127,800	6,900	141,500
1953	240,400	198,600	188,000	177,447 ⁴	154,000	6,147 ⁴	6,950 ⁴	10,670 ⁴	16,900	145,300	139,200	6,147 ⁴	153,500
1954	238,000	196,800	186,500	176,660 ⁴	153,200	5,630 ⁴	6,980 ⁴	11,650 ⁴	16,700	142,700	137,100	5,630 ⁴	153,000
1955	254,500	211,700	201,500	193,291 ⁴	169,400	5,801 ⁴	8,290 ⁴	12,400	24,400	154,400	148,600	5,801 ⁴	168,000
1956	272,300	228,200	218,300	210,700	186,200	6,206 ⁴	9,560 ⁴	13,700	28,100	170,700	164,500	6,206 ⁴	181,500
1957	284,500	239,300	229,100	227,893 ⁴	203,100	6,177 ⁴	10,116 ⁴	15,500	28,200	179,800	173,600	6,177 ⁴	190,000
1958	288,200	240,500	230,200	229,624 ⁴	205,600	5,722 ⁴	11,102 ⁴	17,000	28,300	177,100	171,400	5,722 ⁴	192,000
1959	306,600	258,900	247,000	246,957 ⁴	222,500	5,751 ⁴	11,406 ⁴	18,600	29,700	192,700	186,900	5,751 ⁴	209,000
1960	319,100	271,900	261,500	260,600	234,300	5,648 ⁴	11,952 ⁴	20,300	29,100	200,600	195,000	5,648 ⁴	220,000
1961	328,000	279,500	268,900	266,872 ⁴	238,800	5,345 ⁴	13,227 ⁴	22,200	29,900	204,300	199,000	5,345 ⁴	226,500
1962	357,900	298,000	286,800	284,838 ⁴	255,700	5,381 ⁴	13,557 ⁴	24,100	31,300	218,000	212,600	5,381 ⁴	241,000
1963	363,900	313,400	301,900	298,770 ⁴	268,200	5,350 ⁴	14,620 ⁴	26,100	31,600	228,400	223,000	5,350 ⁴	254,000
1964	388,600	336,100	323,700	321,135 ⁴	288,400	5,446 ⁴	15,789 ⁴	28,500	33,500	244,600	239,200	5,446 ⁴	272,000
1965	418,900	362,000	349,100	342,944 ⁴	308,600	5,590 ⁴	16,254 ⁴	31,300	40,200	263,500	257,900	5,590 ⁴	292,000
1966	458,900	398,400	382,300	382,200	344,200	5,676 ⁴	17,640 ⁴	34,700	43,900	289,600	283,900	5,676 ⁴	321,000
1967	488,200	427,000	409,900	411,300	374,700	5,734 ⁴	19,105 ⁴	39,200	44,700	307,700	302,000	5,734 ⁴	342,000
1968	533,600	470,000	450,700	451,800	410,500	5,878 ⁴	21,537 ⁴	42,700	46,300	337,200	331,300	5,878 ⁴	376,000
1969	582,700	515,700	496,000	495,900	452,500	6,092 ⁴	23,127 ⁴	47,000	46,900	371,800	365,700	6,092 ⁴	414,000
1970	614,900	548,700	528,000	528,300	480,000	6,281 ⁴	26,335 ⁴	53,100	47,900	389,000	382,700	6,281 ⁴	441,000
1971	650,300	580,900	560,200	555,300	505,200	6,600	27,800	57,400	50,600	417,800	411,200	6,600	469,000
1972	712,000	635,200	613,500	615,600	559,100	7,200	29,800	66,100	54,500	499,500	492,300	7,200	512,000
1973	796,500	702,700	680,500	682,200	619,800	7,900	31,700	74,000	62,800	558,800	550,900	7,900	578,000
1974	854,500	765,700	742,900	744,900	678,100	8,400	34,300	81,000	65,600	621,500	613,100	8,400	637,000
1975	896,400	806,400	783,300	783,200	717,200	8,300	36,800	86,800	70,400	693,800	685,500	8,300	678,000
1976	984,000	889,900	866,400	869,000	797,900	9,300	38,600	98,900	76,800	768,400	759,100	9,300	750,000
1977	1,087,300	983,800	959,500	966,700	887,500	10,000	41,600	105,500	80,600	853,500	843,500	10,000	827,000
1978	1,222,300	1,105,100	1,078,400	1,079,900	999,800	10,900	44,700	112,200	88,100	1,055,400	1,044,500	10,900	922,000
1979	1,369,700	1,237,600	1,210,600	1,207,100	1,117,900	12,500	48,300	118,500	99,800	1,187,800	1,175,300	12,500	1,041,000
1980	1,552,700	1,372,000	1,342,300	1,318,100	1,229,200	13,100	52,300	122,900	97,700	1,308,800	1,290,000	13,100	1,136,000
1981	1,697,200	1,510,400	1,475,300	1,444,700	1,347,600	13,400	56,300	135,200	98,900	1,432,600	1,419,500	13,400	1,247,000
1982	1,716,600	1,586,100	1,546,300	1,529,300	1,423,300	12,700	59,100	142,600	98,600	1,500,100	1,487,400	12,700	1,301,000
1983	1,867,100	1,676,200	1,633,900	1,613,600	1,502,100	12,500	62,200	153,500	109,300	1,583,200	1,570,700	12,500	1,382,000
1984	2,073,300	1,838,800	1,793,800	1,774,800	1,665,000	13,200	64,800	162,300	117,200	1,739,200	1,726,000	13,200	1,516,000

Notes appear at end of table

(continued)

TABLE Bf271-283 Employment covered under selected government social insurance programs – estimated payrolls: 1937-1996 *Continued*

Year	Total earnings in employment, including self-employment	Wage and salary disbursements		Wages and salaries in employment covered by retirement programs					Net earnings of self-employed covered by OASDHI	Wages and salaries in civilian employment covered by other programs			
		Total	Civilian	Total	OASDHI	Railroad	Federal civil service	State and local government		Unemployment insurance			
										Total	State programs	Railroad	Workers' compensation
		Bf272	Bf273	Bf274	Bf275	Bf276	Bf277	Bf278	Bf279	Bf280	Bf281	Bf282	Bf283
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1985	2,231,300	1,975,400	1,927,500	1,896,100	1,782,300	12,800	70,100	175,300	130,000	1,870,000	1,857,200	12,800	1,618,000
1986	2,376,800	2,094,800	2,044,800	2,011,200	1,896,200	12,200	72,400	189,900	139,000	1,982,900	1,970,700	12,200	1,725,000
1987	2,573,100	2,249,700	2,197,500	2,157,500	2,042,000	11,900	74,200	203,000	155,800	2,045,500	2,033,600	11,900	1,845,000
1988	2,767,300	2,443,000	2,389,800	2,342,600	2,224,700	12,000	79,600	218,800	208,100	2,205,100	2,193,100	12,000	1,997,400
1989	2,933,700	2,586,400	2,531,400	2,492,700	2,367,800	12,100	83,400	235,000	210,000	2,336,200	2,324,100	12,100	2,115,000
1990	3,109,700	2,742,800	2,685,300	2,636,400	2,510,000	11,800	87,600	238,800	193,800	2,491,600	2,479,800	11,800	2,442,000
1991	3,190,500	2,827,600	2,765,900	2,694,700	2,565,000	12,000	92,300	271,400	195,500	2,548,900	2,536,900	12,000	2,552,900
1992	3,410,200	2,986,400	2,925,400	2,850,700	2,711,000	12,700	98,000	296,300	205,800	2,697,300	2,684,600	12,700	2,699,600
1993	3,540,400	3,089,600	3,031,400	2,964,600	2,821,000	12,400	100,800	307,000	212,000	2,797,900	2,785,500	12,400	2,802,100
1994	3,712,300	3,240,700	3,185,800	3,102,100	2,954,000	12,500	102,900	320,300	221,500	2,946,200	2,933,700	12,500	2,948,700
1995	3,918,500	3,429,500	3,373,300	3,294,000	3,140,000	12,600	104,300	341,400	234,900	3,129,200	3,116,600	12,600	3,122,600
1996	4,152,800	3,632,500	3,576,000	3,489,400	3,328,000	12,800	107,200	364,500	254,200	3,327,400	3,314,600	12,800	—

¹ Beginning in 1953, data are adjusted for duplication of payrolls covered by both Old-Age, Survivors, Disability, and Health Insurance (OASDHI) and state and local government retirement systems. Beginning in 1984, data are adjusted for duplication of payrolls covered by both OASDHI and the federal civil service retirement system.

² Beginning in 1975, OASDHI estimates include a small amount of taxable wages in American business in U.S. territories and possessions.

³ Beginning in 1957, includes military wages. Beginning in 1975, includes a small amount of taxable wages on American business in U.S. territories and possessions.

⁴ Revised from original source.

Sources

1937-1939, unpublished data from U.S. Social Security Administration; 1940-1945, *U.S. Social Security Bulletin, Annual Statistical Supplement, 1971*, Table 6; 1946 to present, *U.S. Social Security Bulletin, Annual Statistical Supplement, 1999*, Table 3.B2, p. 141.

Documentation

This table reports data for total earnings and total wages and salaries in employment covered by various government social insurance programs. Total

earnings include the earnings of people who are self-employed. For state unemployment insurance, OASDHI, railroad retirement, and railroad unemployment insurance, data include taxable plus nontaxable wages and salaries in employment covered by the programs.

The U.S. Bureau of Economic Analysis (formerly Office of Business Economics) is the original source for total earnings and wage and salary disbursements, series Bf271-273. The U.S. Social Security Administration is the original source for payrolls covered by state and local government retirement systems and by workers' compensation, series Bf278 and Bf283. Data for series Bf274-277 and Bf279-282 are based on reports of the agencies administering the programs specified.

Series Bf283. Data for payrolls in employment covered by workers' compensation programs exclude railroad employees because accident compensation for railroad employees is based on negligence liability rules under the federal Employers' Liability Act of 1908 and amendments.

TABLE Bf284–289 Employment covered under government social insurance programs – number of workers: 1934–1989

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Civilian population covered by public retirement programs			Civilian population covered by other social insurance programs		
	OASDHI	Railroad Retirement System	Public employee retirement systems	Workers' compensation	Unemployment insurance	Temporary disability insurance
	Bf284	Bf285	Bf286	Bf287	Bf288	Bf289
	Million	Million	Million	Million	Million	Million
1934	—	1.4	17.0	—	—	—
1939	24.0	1.2	2.0	22.0	22.6	—
1944	30.8	1.7	4.7	33.0	31.6	0.2
1949	34.3	1.4	4.4	35.3	33.1	5.3
1954	45.3	1.2	4.6	40.4	37.2	10.7
1955	51.8	1.3	4.7	42.9	41.7	11.2
1956	53.2	1.2	4.5	44.1	43.8	11.5
1957	53.7	1.1	3.9	43.1	43.2	11.2
1958	53.4	1.0	3.9	42.7	42.6	11.0
1959	55.4	0.9	3.8	45.1	44.1	11.4
1960	55.7	0.9	3.9	44.6	43.7	11.3
1961	56.1	0.8	4.0	46.0	44.6	11.8
1962	57.3	0.8	4.0	46.8	45.4	12.3
1963	58.5	0.8	3.7	48.2	46.3	12.5
1964	60.1	0.8	3.9	50.0	47.9	12.7
1965	62.8	0.8	4.1	52.5	50.3	13.3
1966	64.9	0.7	4.6	55.1	52.8	13.7
1967	65.7	0.7	4.6	56.3	53.8	14.0
1968	67.1	0.7	4.6	58.3	55.5	14.2
1969	68.6	0.7	3.9	60.1	57.0	14.8
1970	69.1	0.6	5.5	59.0	55.8	14.6
1971	69.8	0.6	5.2	60.5	57.1	14.8
1972	72.6	0.6	5.2	63.7	66.0	16.0
1973	75.6	0.6	5.3	68.0	69.0	16.0
1974	75.2	0.6	5.3	67.8	69.5	15.7
1975	75.7	0.5	6.0	68.6	69.7	15.7
1976	80.3	0.5	6.1	70.4	72.1	16.2
1977	82.1	0.5	6.2	74.2	75.8	16.7
1978	83.2	0.5	6.4	74.5	85.8	18.0
1979	87.6	0.5	6.4	77.4	87.9	18.1
1980	89.3	0.5	6.6	79.1	90.4	18.4
1981	89.5	0.5	6.4	79.8	89.9	18.4
1982	88.9	0.4	6.4	77.8	87.9	18.1
1983	92.7	0.4	6.4	80.9	91.3	18.7
1984	98.0	0.4	6.0	83.4	95.8	18.9
1985	100.3	0.3	6.0	85.1	98.2	19.8
1986	102.9	0.3	5.9	87.2	100.2	20.3
1987	106.0	0.3	5.9	90.0	103.7	21.6
1988	108.4	0.3	5.8	92.8	106.9	21.8
1989	110.3	0.3	5.8	95.3	109.1	—

Sources

U.S. Social Security Administration, 1934, unpublished data; 1939–1989, *Social Security Bulletin, Annual Statistical Supplement*. 1985–1989 from 1990 volume, 1984 from 1989 volume, 1983 from 1986 volume, 1979–1982 from 1984–1985 volume, 1977–1978 from 1983 volume, 1970, 1975–1976 from 1982 volume, 1971–1974 from 1974 volume, 1968–1969 from 1972 volume, 1967, 1965, 1964 from 1971 volume. Earlier figures were collected from earlier volumes for the 1975 edition of *Historical Statistics of the United States*.

Documentation

For further information, see also the text for Tables Bf212–224, Bf271–283, and Bf377–394. More details on these programs can be found in Tables Bf326–348, Bf377–496, Bf511–567, and Bf735–761. The U.S. Social Security Administration stopped reporting this table in the *Annual Statistical Supplement* after the 1990 issue.

All series are as of December for the period 1954 to 1989. Monthly averages are reported prior to 1954. Monthly averages for 1954 are 45.3 for

Old-Age, Survivors, Disability, and Health Insurance (OASDHI), 1.2 for railroad, 4.5 for public employees retirement, 39.7 for workers' compensation, 36.6 for unemployment insurance, and 10.6 for temporary disability.

Series Bf284. Beginning in 1955, includes persons covered under both a government retirement system and OASDHI (about 5.3 million in December 1970). Excludes members of the armed forces and persons whose coverage was authorized on an elective or optional basis but not in effect (about 3.5 million in December 1970). Also excludes railroad employees jointly covered by OASDHI and their own retirement program.

Series Bf286, public employee retirement. Excludes persons covered under both a government retirement system and OASDHI.

Series Bf288, unemployment insurance. Includes state, railroad, and federal employee programs.

Series Bf289, temporary disability insurance. Includes state and railroad programs, but excludes government employees covered by sick-leave provisions.

TABLE Bf290-325 Social insurance and veterans' programs – cash benefits: 1940-1988

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Retirement programs							Disability programs						
	Public employees							Total	OASDHI	Workers' compensation	Veterans	Railroad		
	Total	Total	OASDHI	Railroad	Federal	State and local							Veterans	
						Bf290	Bf291	Bf292	Bf293	Bf294	Bf295	Bf296		Bf297
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1940	1,540.3	330.8	17.2	83.3	103.2	103.0	24.1	476.5	0.0	129.0	293.7	30.8		
1941	1,418.2	325.7	55.1	88.4	50.9	106.8	24.4	501.1	0.0	149.0	296.1	31.5		
1942	1,499.8	369.4	80.3	91.6	53.2	115.4	29.0	523.8	0.0	170.0	296.3	31.2		
1943	1,370.6	459.1	97.3	94.6	109.7	124.9	32.6	543.2	0.0	182.0	298.7	31.2		
1944	1,629.9	523.1	119.0	98.7	121.7	134.5	49.3	700.9	0.0	227.0	407.0	31.0		
1945	2,604.1	591.7	148.1	106.2	141.0	143.0	53.4	954.4	0.0	241.0	644.5	30.9		
1946	5,768.9	748.7	230.3	117.8	112.8	158.0	57.4	1,536.8	0.0	251.0	1,211.6	31.4		
1947	5,409.3	899.6	299.8	138.5	231.9	175.0	54.2	2,021.5	0.0	281.0	1,621.7	38.5		
1948	5,298.7	1,048.9	366.9	150.1	277.7	190.0	64.2	2,135.3	0.0	312.0	1,647.0	58.5		
1949	6,578.5	1,242.9	454.5	168.9	354.8	203.0	61.7	2,181.9	0.0	333.0	1,630.5	72.0		
1950	6,321.5	1,423.5	651.4	176.9	286.9	250.0	58.2	2,441.9	0.0	360.0	1,674.0	77.3		
1951	6,834.4	2,189.3	1,321.1	187.1	345.9	273.0	62.4	2,487.3	0.0	416.0	1,585.6	81.6		
1952	7,734.3	2,574.0	1,539.3	267.3	370.2	310.0	87.2	2,632.1	0.0	460.0	1,635.0	93.9		
1953	8,937.6	3,300.2	2,175.3	267.3	413.9	343.0	86.3	2,850.8	0.0	491.0	1,754.2	92.5		
1954	11,136.1	3,953.8	2,698.0	324.9	466.9	385.0	79.1	2,975.6	0.0	498.0	1,842.3	104.0		
1955	12,166.8	5,157.4	3,747.7	335.9	538.0	460.0	75.8	3,185.2	0.0	521.0	1,981.8	103.1		
1956	13,294.6	5,964.9	4,361.2	379.8	628.0	525.0	71.1	3,344.2	0.0	578.0	2,030.7	110.7		
1957	15,848.9	7,503.1	5,687.8	420.2	725.1	606.0	64.1	3,590.9	56.7	617.0	2,116.4	118.3		
1958	19,946.6	8,516.5	6,476.7	449.4	848.9	685.0	56.5	4,083.4	246.2	647.0	2,325.7	121.3		
1959	20,862.8	9,910.5	7,607.0	523.1	965.7	765.0	49.7	4,527.9	456.7	700.0	2,424.7	66.2		
1960	22,610.1	10,754.6	8,196.1	594.4	1,076.4	845.0	42.7	4,859.6	568.2	755.0	2,529.7	146.7		
1961	26,101.4	11,868.2	9,031.9	617.5	1,241.4	940.0	37.4	5,402.2	887.1	791.0	2,646.8	150.5		
1962	27,050.8	13,138.8	10,161.9	638.4	1,295.8	1,011.1	31.7	5,851.3	1,105.1	879.0	2,724.3	156.1		
1963	28,723.4	14,238.0	10,794.6	653.7	1,627.8	1,135.0	26.9	6,187.3	1,210.2	932.0	2,819.1	159.0		
1964	29,973.3	15,122.2	11,281.5	667.5	1,891.0	1,260.0	22.3	6,466.1	1,308.8	1,001.0	2,846.0	161.7		
1965	32,571.5	16,786.8	12,541.5	705.3	2,130.0	1,390.0	19.9	7,041.0	1,573.2	1,074.0	3,026.4	149.4		
1966	34,984.9	18,276.9	13,417.1	739.1	2,549.5	1,555.0	16.3	7,600.5	1,781.4	1,143.0	3,173.2	164.5		
1967	37,727.6	19,823.2	14,361.5	817.3	2,896.2	1,735.0	13.3	8,041.9	1,938.9	1,284.0	3,197.9	171.6		
1968	42,483.3	22,726.1	16,533.5	936.5	3,285.1	1,960.0	11.0	8,725.0	2,294.3	1,374.0	3,264.7	187.5		
1969	46,227.6	24,709.6	1,769.1	965.5	3,787.3	2,250.0	8.8	9,775.6	2,542.2	1,519.0	3,706.2	193.0		
1970	55,609.4	29,401.5	21,075.2	1,112.9	4,549.5	2,660.0	4.0	11,000.8	3,067.0	1,674.0	3,930.9	219.3		
1971	65,679.2	34,338.7	24,540.2	1,272.7	5,377.7	3,145.0	3.1	12,557.5	3,758.2	1,846.0	4,252.6	253.0		
1972	72,781.4	38,797.2	27,383.8	1,372.2	6,268.8	3,770.0	2.3	14,029.1	4,473.2	2,009.0	4,497.6	288.5		
1973	84,670.2	46,472.4	33,084.6	1,539.3	7,426.8	4,415.0	1.7	16,371.4	5,718.0	2,312.0	4,618.3	368.1		
1974	98,646.7 ¹	53,593.5	37,451.9	1,679.9	9,265.5	5,195.0	1.2	18,849.5 ¹	6,902.9	2,701.0	5,133.4	403.9		
1975	123,235.2	61,543.3	42,432.0	1,965.7	11,299.7	5,845.0	0.8	21,883.5	8,413.9	3,248.0	5,583.2	403.0		
1976	135,288.6	69,662.4	48,069.0	2,147.1	12,760.8	6,685.0	0.6	25,037.8	9,965.7	3,809.0	6,147.4	420.8		
1977	145,450.6 ¹	77,683.9 ¹	53,591.0	2,297.5	14,145.1	7,650.0	0.3	28,208.4 ¹	11,462.6	4,495.0	6,708.9	455.2		
1978	155,286.3	86,755.7	59,818.3	2,417.1	15,884.3	8,636.0	—	30,808.2	12,518.9	5,217.0	7,009.5	471.9		
1979	174,214.7 ¹	97,465.5	66,947.0	2,627.6	18,124.9	9,766.0	—	34,858.9	13,708.0	6,199.0	7,905.3	510.8		
1980	207,796.8	113,252.0	77,905.0	2,930.6	21,624.1	10,792.3	—	39,659.4	15,437.0	7,245.0	8,602.2	564.4		
1981	231,599.4	132,518.1	92,478.0	3,234.2	24,677.3	12,128.6	—	44,332.0	17,199.0	8,166.0	9,524.4	610.1		
1982	261,158.7	149,074.7	104,885.0	3,530.6	27,157.3	13,501.8	—	46,610.7	17,338.0	8,909.0	10,203.2	668.3		
1983	275,108.1	161,326.8	114,048.0	3,698.1	28,856.7	14,724.0	—	48,063.0	17,530.0	9,519.0	10,488.6	673.8		
1984	282,978.9	173,419.4	123,804.2	3,761.6	29,716.6	16,137.0	—	50,133.3	17,897.1	10,852.0	10,577.7	681.1		
1985	301,528.6	187,531.6	132,298.0	3,862.1	32,188.5	19,183.0	—	52,129.1	18,645.7	12,646.4	10,748.0	696.3		
1986	316,272.1 ¹	198,226.7	140,418.2	3,942.8	32,258.7	21,607.0	—	55,155.6	19,524.5	13,333.0	10,886.1	705.8		
1987	328,642.0	209,074.6	146,836.1	4,060.5	33,640.0	24,538.0	—	57,770.6	20,413.6	14,179.3	11,209.8	738.4		
1988	345,022.7	223,530.0	156,695.7	4,192.8	36,020.4	26,621.1	—	60,309.2	21,386.1	15,737.8	11,346.9	776.5		

Notes appear at end of table

(continued)

TABLE Bf290-325 Social insurance and veterans' programs – cash benefits: 1940-1988 *Continued*

Year	Disability programs					Survivor programs (paid monthly)							
	Public employees		State temporary disability insurance	Railroad temporary disability	Black lung	Public employees							
	Federal	State and local				Total	OASDHI	Railroad	State and local		Veterans	Workers' compensation	Black lung
	Bf302	Bf303	Bf310	Bf311									
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1940	13.0	10.0	0.0	0.0	—	161.5	6.4	1.4	—	16.0	105.7	32.0	—
1941	14.0	10.5	0.0	0.0	—	192.3	25.5	1.6	(Z)	16.5	111.8	37.0	—
1942	14.9	11.4	0.0	0.0	—	214.2	41.7	1.6	(Z)	17.7	111.2	42.0	—
1943	16.2	12.2	2.9	0.0	—	239.0	57.8	1.7	(Z)	18.4	116.1	45.0	—
1944	17.3	13.5	5.0	0.0	—	282.1	76.9	1.8	(Z)	19.0	144.3	40.0	—
1945	18.9	14.5	4.7	0.0	—	417.8	99.7	2.0	0.1	20.0	254.2	42.0	—
1946	22.0	16.0	4.8	0.0	—	530.8	130.1	1.8	0.2	21.0	333.6	44.0	—
1947	24.8	18.0	26.0	11.4	—	623.1	153.1	19.3	0.2	22.0	382.5	46.0	—
1948	31.4	20.0	35.6	30.8	—	700.6	176.7	36.0	0.9	23.0	413.9	50.0	—
1949	35.3	22.0	59.1	30.1	—	799.3	201.4	39.3	4.3	25.0	477.4	52.0	—
1950	189.3	24.0	89.3	28.1	—	901.8	276.9	43.9	8.4	26.0	491.6	55.0	—
1951	201.9	28.0	147.8	26.3	—	1,178.7	506.8	49.5	14.0	29.0	519.4	60.0	—
1952	211.0	30.0	167.7	34.7	—	1,353.6	591.5	74.1	20.0	30.0	573.0	65.0	—
1953	248.0	35.0	185.0	45.2	—	1,569.7	743.5	83.3	27.3	32.0	613.5	70.0	—
1954	256.0	45.0	186.0	49.2	—	1,740.8	880.0	93.2	33.9	35.0	628.8	70.0	—
1955	279.7	55.0	192.7	52.0	—	2,068.4	1,107.5	121.8	40.6	40.0	688.4	70.0	—
1956	297.8	62.0	215.5	49.5	—	2,247.8	1,244.1	133.2	51.3	45.0	699.2	75.0	—
1957	309.2	68.0	254.0	51.3	—	2,604.8	1,520.7	143.8	60.6	51.0	748.7	80.0	—
1958	343.1	75.0	273.1	51.9	—	2,891.1	1,720.1	153.9	75.7	57.0	794.3	90.0	—
1959	374.1	85.0	287.1	66.2	—	3,322.3	2,063.3	180.9	97.1	62.0	819.1	100.0	—
1960	396.9	95.0	311.3	56.9	—	3,671.6	2,316.2	201.3	109.6	75.0	864.6	105.0	—
1961	425.2	105.0	341.6	55.0	—	4,150.5	2,658.6	217.1	123.3	85.0	956.5	110.0	—
1962	456.6	114.0	364.9	51.4	—	4,565.3	3,011.1	233.9	136.8	91.8	976.7	115.0	—
1963	499.9	125.0	392.8	49.5	—	4,869.1	3,216.0	244.2	160.6	105.0	1,018.3	125.0	—
1964	552.8	140.0	409.9	46.0	—	5,176.5	3,416.4	255.0	180.8	115.0	1,074.2	135.0	—
1965	596.3	155.0	426.0	40.8	—	5,871.5	3,979.0	278.4	199.4	125.0	1,149.7	140.0	—
1966	681.7	175.0	442.8	38.8	—	6,620.4	4,612.8	291.4	242.3	140.0	1,184.0	150.0	—
1967	747.5	195.0	472.5	34.6	—	7,014.8	4,854.0	307.6	288.0	165.0	1,245.2	155.0	—
1968	812.5	220.0	530.9	41.0	—	8,192.3	5,839.5	350.6	321.8	175.0	1,340.3	165.0	—
1969	904.9	255.0	598.0	57.4	—	8,774.1	6,219.3	367.0	368.6	195.0	1,439.2	185.0	—
1970	1,056.8	255.0	664.6	56.2	77.0	10,271.5	7,427.6	424.0	444.7	200.0	1,545.2	197.0	33.0
1971	1,210.7	280.0	680.0	44.7	232.0	11,815.9	8,566.7	476.8	513.9	220.0	1,678.8	213.0	146.7
1972	1,372.4	315.0	707.8	35.7	330.0	13,069.8	9,418.2	514.3	587.1	250.0	1,840.2	235.0	225.0
1973	1,536.7	365.0	775.3	27.9	650.0	16,429.2	12,327.8	657.7	675.1	290.0	1,818.5	265.0	395.0
1974	1,810.8	425.0	842.3	30.2	600.0	18,349.0	13,839.3	723.9	841.1	340.0	1,934.7	315.0	355.0
1975	2,212.3	490.0	890.4	47.6	595.0	20,716.1	15,544.0	914.0	1,058.9	390.0	2,084.1	365.0	360.0
1976	2,535.9	565.0	916.7	84.4	593.0	23,052.7	17,297.5	1,002.5	1,226.4	450.0	2,261.3	430.0	385.0
1977	2,869.6	630.0	939.9	74.2	573.0	25,367.0 ¹	19,210.3	1,071.1	1,392.1	450.0	2,368.5	482.0	393.0
1978	3,192.5	712.0	1,027.5	66.9	591.0	26,878.3	20,193.5	1,132.3	1,602.7	508.0	2,481.7	531.0	429.0
1979	3,571.9	804.0	1,161.0	60.9	1,033.0	30,722.0 ¹	23,140.0	1,223.7	1,858.8	575.0	2,649.5	610.0	665.0
1980	4,160.1	1,210.7	1,299.8	63.2	1,077.0	34,986.0	26,654.0	1,371.6	2,231.6	663.9	2,754.9	675.0	635.0
1981	4,728.8	1,490.2	1,525.1	58.4	1,030.0	40,136.7	30,875.0	1,527.1	2,615.0	767.3	2,952.3	730.0	670.0
1982	5,141.8	1,811.0	1,567.9	55.6	916.0	43,631.6	33,612.0	1,644.1	2,905.4	857.0	3,113.1	795.0	705.0
1983	5,364.4	1,987.0	1,580.2	50.1	870.0	45,615.1	35,164.0	1,671.3	3,174.9	903.0	3,191.9	810.0	700.0
1984	5,498.0	2,178.0	1,584.1	42.0	823.0	44,971.1	33,916.6	1,678.6	3,565.8	990.0	3,230.1	880.0	710.0
1985	4,862.5	1,848.0	1,843.5	42.6	796.0	46,289.2	34,806.9	1,702.3	3,792.5	968.0	3,309.5	980.0	730.0
1986	5,913.1	1,833.0	2,067.3	57.8	838.0	45,667.8	33,785.4	1,722.0	3,983.6	1,002.0	3,374.8	1,032.0	768.0
1987	5,995.9	1,807.0	2,545.4	72.4	808.8	47,068.2	35,028.7	1,736.9	4,324.7	1,041.0	3,123.0	1,067.3	746.6
1988	5,494.9	1,960.9	2,753.6	63.7	788.8	48,601.9	35,663.8	1,762.5	4,634.6	1,129.0	3,499.3	1,184.6	728.1

Notes appear at end of table

(continued)

TABLE Bf290-325 Social insurance and veterans' programs – cash benefits: 1940-1988 *Continued*

Year	Lump-sum payments						Unemployment programs				
	Total	OASDHI	Railroad retirement	Public employee retirement		Veterans' programs	Total	State unemployment insurance	Railroad unemployment insurance	Veterans' unemployment allowances	Training and related allowances
				Federal	State and Local						
				Bf315	Bf316						
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1940	36.8	11.8	2.5	6.0	12.5	4.0	534.7	518.7	16.0	—	—
1941	40.3	13.3	3.4	6.2	13.0	4.4	358.9	344.3	14.5	—	—
1942	42.0	15.0	4.1	6.3	12.6	4.1	350.4	344.1	6.3	—	—
1943	48.7	17.8	5.6	7.6	13.4	4.4	80.6	79.6	0.9	—	—
1944	56.7	22.1	6.6	8.2	15.0	4.8	67.1	62.4	0.6	4.1	—
1945	65.3	26.1	8.1	10.5	15.5	5.0	574.9	445.9	2.4	126.6	—
1946	74.2	27.3	9.1	14.3	16.0	7.5	2,626.1	1,094.9	40.0	1,491.3	—
1947	79.0	29.5	6.1	14.1	16.0	13.3	1,587.9	776.2	39.4	772.4	—
1948	81.8	32.3	8.9	11.2	17.0	12.4	1,248.4	793.3	28.6	426.6	—
1949	83.3	33.2	11.5	8.2	18.0	12.4	2,227.5	1,737.3	103.6	386.6	—
1950	86.7	32.7	12.7	8.5	20.0	12.7	1,467.6	1,373.1	59.8	34.7	—
1951	116.1	57.3	12.7	8.2	25.0	12.9	862.8	840.4	20.2	2.1	—
1952	131.0	63.3	13.7	8.8	30.0	15.1	1,043.6	988.2	41.8	3.5	—
1953	166.3	87.5	18.4	9.4	35.0	16.1	1,050.6	962.2	46.7	41.7	—
1954	174.3	92.2	16.3	10.0	40.0	16.2	2,291.6	2,026.9	157.1	107.7	—
1955	195.6	112.9	16.1	9.8	40.0	16.8	1,560.2	1,379.2	93.3	87.7	—
1956	197.1	109.3	14.5	10.7	45.0	17.5	1,540.7	1,409.3	70.4	60.9	—
1957	237.0	138.8	16.4	11.5	50.0	20.2	1,913.1	1,766.4	93.5	53.1	—
1958	245.5	132.9	19.9	13.0	55.0	24.7	4,210.1	3,899.2	228.8	82.0	—
1959	297.0	171.3	17.8	12.2	58.0	37.7	2,805.0	2,563.1	224.5	17.4	—
1960	299.5 ¹	164.3	20.0	12.7	63.0	39.5	3,024.7	2,866.7	157.7	0.4	—
1961	322.4	171.1	20.6	14.9	73.0	42.8	4,358.2	4,156.3	201.9	—	20.0
1962	346.5	183.4	22.0	16.9	80.0	44.1	3,149.0	3,012.6	132.7	—	3.7
1963	381.3	205.9	24.1	15.7	85.0	50.7	3,047.6	2,926.5	99.4	—	21.6
1964	407.5	216.4	24.4	18.1	95.0	53.6	2,801.0	2,670.8	78.4	—	51.8
1965	420.5	216.9	22.2	19.6	105.0	56.8	2,451.6	2,283.4	60.5	—	107.6
1966	456.6	237.1	25.2	20.3	115.0	59.0	2,030.6	1,852.2	39.3	—	139.1
1967	483.9	252.2	24.3	20.1	125.0	62.4	2,363.9	2,183.4	40.6	—	139.8
1968	512.3	269.2	23.6	22.0	130.0	67.5	2,327.7	2,151.3	40.4	—	136.0
1969	545.2	291.2	26.2	23.9	135.0	68.9	2,423.0	2,261.6	37.0	—	124.4
1970	582.2	293.6	26.4	24.2	165.0	73.0	4,353.3	4,183.7	38.7	—	130.9
1971	604.2	305.6	26.5	24.5	175.0	72.5	6,362.9	6,130.8	75.7	—	156.4
1972	645.7	319.8	30.5	20.0	200.0	75.4	6,239.6	6,043.2	51.5	—	144.9
1973	700.7	328.8	27.5	21.1	240.0	83.3	4,696.5	4,542.7	30.6	—	123.1
1974	779.0	327.3	28.2	23.4	275.0	125.2	7,075.7	6,943.7	22.2	—	109.8
1975	807.8	337.0	25.0	21.4	300.0	124.4	18,284.6	18,188.1	89.5	—	7.0
1976	863.7	332.5	23.6	22.5	350.0	135.2	16,672.0	16,537.2	134.7	—	—
1977	753.6	312.0	18.6	22.0	270.0	131.0	13,437.6	13,337.8	99.8	—	—
1978	828.8	344.5	16.3	29.4	304.0	134.6	10,015.3	9,890.8	124.5	—	—
1979	873.8	340.0	15.4	22.5	345.0	150.8	10,294.5	10,212.0	82.5	—	—
1980	963.6	395.0	13.6	25.7	351.6	177.7	18,935.9	18,756.5	179.4	—	—
1981	862.0	332.0	13.0	44.8	368.9	103.3	13,750.6	13,542.8	207.8	—	—
1982	770.0	203.0	11.0	40.2	397.7	118.2	21,071.7	20,733.0	338.7	—	—
1983	822.5	205.0	10.7	39.2	452.0	115.6	19,280.7 ¹	18,992.1	288.6	—	—
1984	811.6	140.0	10.5	43.2	495.0	122.9	13,643.5	13,495.5	148.0	—	—
1985	817.8	142.9	9.3	39.5	502.0	124.1	14,760.9	14,629.2	131.7	—	—
1986	1,105.7	136.2	9.6	62.2	778.0	119.7	16,116.3 ¹	15,988.0	128.3	—	—
1987	337.8 ²	138.0	9.3	56.2	—	134.3	14,390.8	14,276.2	114.6	—	—
1988	352.1	142.1	7.7	68.7	—	133.6	12,229.5	12,158.7	70.8	—	—

(Z) Less than \$50,000.

¹ Revised from the original source.² The sharp drop relative to previous years is the result of the unavailability of series Bf319.**Sources**U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement*, For the years 1985-1988: 1990, pp. 106-7; for 1970, 1980, 1983-1985: 1987, pp. 256-7; for 1982: 1986, pp. 252-3; for 1981:

1984-1985, pp. 223-4; for 1975, 1978, 1979: 1982, pp. 220-1; for 1977: 1981, pp. 66-7; for 1976: 1980, pp. 67-8; for 1973-1974: 1975, p. 50; for 1972: 1974, p. 47; for 1971: 1973, pp. 43-4; for 1940, 1950, 1955, 1960, 1965, 1970-1972: 1973, p. 43; for 1969: 1970, p. 29; for 1966, 1967: 1968, p. 28; for 1962-1964: 1965, p. 6; for 1961: 1964, p. 6; for 1958-1959: 1962, p. 6; for 1956-1957: 1960, p. 6; for 1951-1954: 1957, p. 14; for 1944-1949: 1952, p. 27; for 1943: 1946, p. 3; for 1942: 1945, p. 18; for 1941: 1944, p. 23.

TABLE Bf290–325 Social insurance and veterans' programs – cash benefits: 1940–1988 *Continued*

The U.S. Social Security Administration stopped publishing the data for Tables Bf290–348 in the *Annual Statistical Supplement* after the 1990 issue. More recent data at higher levels of aggregation are published in the quarterly *Social Security Bulletin*, Tables 4.A1 and 4.A2. The data are reported through 1997 at a more aggregate level in Tables Bf349–376. Most of the data are derived from operating statistics of the administering agencies.

Documentation

Tables Bf290–348 are usually published in combination. The following discussion pertains to both tables where appropriate.

Revisions of the series that are sums of several series were made when there were significant discrepancies with the published numbers for those aggregates and after double-checking the original source and earlier published versions of the series involved.

Beneficiary data for workmen's compensation are not available.

Series Bf290. The sum of series Bf291, Bf297, Bf307, Bf315, and Bf321. Differs from the total listed in series H125 of *Historical Statistics of the United States* (1975) because lump-sum payments have been included. The majority of social insurance programs make a stream of payments to recipients over time, which are reported as monthly cash payments. In some cases, the programs pay lump sums to beneficiaries, which are listed in series Bf315–320.

Series Bf291. The sum of series Bf292–296.

Series Bf291–306. Retirement and disability benefits series include benefits to spouses and children where applicable.

Series Bf294–295, Bf302–303, Bf310–311, and Bf318–319. The public employee benefits series include refunds of contributions to employees who leave service.

Series Bf294, Bf302, Bf310, Bf318, Bf328, Bf334, and Bf341. Series for the federal government systems include federal civil service and other contributory systems and federal noncontributory systems. Prior to 1954, retirement data, series Bf294 and Bf328, include unknown amounts and numbers of disability and survivor payments. Beneficiaries of the military retirement programs under the Uniformed Services Contingency Option Act of 1953 included under the federal government survivorship retirement program, in series Bf341, represent the number of families.

Series Bf296, Bf300, Bf312, Bf320, Bf330, Bf333, and Bf344. The veterans' retirement series cover veterans of the Civil War, the Indian Wars, the Spanish-American War, the Boxer Rebellion, and the Philippine Insurrection. Beginning October 1951, they include all service pensions.

Series Bf296 and Bf330. Beginning in 1978, the retirement data for veterans are no longer available separately.

Series Bf297. The sum of series Bf298–306.

Series Bf299 and Bf313. For the basis of estimates of workers' compensation payments, see the text for Table Bf511–524. Series Bf313 includes a small but unknown amount of lump-sum death payments.

Series Bf300 and Bf332, veterans' disability payments and beneficiaries. Covers pensions and compensation, clothing allowance (beginning 1973), and subsistence payments to disabled veterans undergoing training (1944–1973).

Series Bf303 and Bf329. Estimates of the operations of the state and local government retirement programs prior to 1950 are based primarily on the Bureau of the Census, *Annual Compendium of State Government Finances* and *Compendium of City Government Finances*. These present fiscal year data (which were averaged to secure calendar year figures) for state-administered and city-administered systems. Data on county-administered systems (not re-

ported, and not many in that period) were estimated by the U.S. Social Security Administration. After 1950 extensive use was made of the 1957, 1962, and 1967 Census of Governments Reports, *Employee-Retirement Systems of State and Local Governments* for benchmark purposes. Beginning 1959, data from the Census Bureau's annual *Finances of Employee-Retirement Systems of State and Local Governments* were used, with certain adjustments through the year 1966 (no adjustments between 1967 and 1970). Two fiscal years are averaged to approximate calendar year data.

Series Bf304 and Bf336, state temporary disability insurance. Covers cash benefits payable in California, New Jersey, New York, Rhode Island, and Puerto Rico under public and private plans. The beneficiary data exclude private-plan beneficiaries in New Jersey. Beginning in 1980, includes data for Hawai'i.

Series Bf307. The sum of series Bf308–314.

Series Bf312 and Bf343, veterans' survivor payments and beneficiaries. Covers special allowances for survivors of veterans who did not qualify under Old-Age, Survivors, Disability, and Health Insurance (OASDHI; Servicemen's and Veterans' Survivor Benefit Act of 1956).

Series Bf315. The sum of series Bf316–320.

Series Bf320. The lump-sum veterans' payments are for burial of deceased veterans.

Series Bf321. The sum of series Bf322–325.

Series Bf322 and Bf345, state unemployment insurance. Covers payments made by the states as agents of the federal government under the federal employees' unemployment compensation program and under the Ex-Servicemen's Compensation Act of 1958 until 1981. Also covers payments under extended unemployment insurance programs. Beginning in 1961, covers program in Puerto Rico. Covers payments under the Automotive Products Trade Act of 1965 and the Trade Expansion Act of 1962, beginning in January 1970.

Series Bf324 and Bf348. Veterans' allowances are paid under the Servicemen's Readjustment Assistance Act of 1944 (terminated July 1949) and the Veterans' Readjustment Assistance Act of 1952 (terminated January 1960). Series Bf324 includes allowances for self-employed, but series Bf348 does not. For example, veterans' allowances to the self-employed were as follows: in 1945, \$11.67 million paid to 12,100 veterans (average monthly number); in 1950, \$1.666 million paid to 1,500 veterans; and a negligible amount thereafter.

Series Bf325 and Bf348, training and related allowances. Fall under the Area Redevelopment Act of 1961 (November 1961–June 1966) and the Manpower Development and Training Act of 1962. The training allowances are based on unemployment insurance in the state of training, and allowances for transportation and maintenance when training is away from home.

Series Bf326, Bf331, and Bf339. The information on beneficiaries for OASDHI is the average monthly number. The source for the 1985–1988 figures claim it is the number on rolls June 30, but this appears to be a misprint.

Series Bf327–330, Bf332, Bf334–335, and Bf340–343. Number on rolls as of June 30.

Series Bf336, Bf345, and Bf347. Average weekly number.

Series Bf337 and Bf346. Average number during the fourteen-day registration period.

Series Bf342. Number of families.

TABLE Bf326-348 Social insurance and veterans' programs – beneficiaries: 1940-1988

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Retirement programs					Disability programs					
	Public employees					Public employees					State temporary disability insurance
	OASDHI	Railroad	Federal	State and local	Veterans	OASDHI	Veterans	Railroad	Federal	State and local	
	Bf326	Bf327	Bf328	Bf329	Bf330	Bf331	Bf332	Bf333	Bf334	Bf335	Bf336
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	
1940	77.2	102.0	80.8	113.0	33.8	—	576.3	39.3	15.5	14.3	—
1941	271.5	112.6	51.0	117.2	39.1	0.0	583.6	40.3	17.6	15.0	—
1942	351.8	115.2	53.6	126.7	44.5	0.0	579.6	39.7	19.1	16.3	0.0
1943	406.3	119.4	56.2	136.0	49.5	0.0	599.1	39.6	20.5	17.6	4.1
1944	463.4	121.5	90.1	146.0	52.4	0.0	763.6	39.1	21.2	19.5	5.9
1945	591.8	129.1	101.1	155.0	60.4	0.0	1,083.7	39.0	23.7	21.0	5.4
1946	842.7	139.7	122.9	167.0	62.5	0.0	2,010.1	39.3	27.3	23.0	5.6
1947	1,068.1	147.1	147.1	180.0	61.6	0.0	2,283.7	51.2	31.6	25.0	23.0
1948	1,294.9	156.0	166.8	190.0	59.8	0.0	2,252.0	63.0	35.8	27.0	24.2
1949	1,574.6	164.3	206.9	200.0	57.4	0.0	2,260.0	70.0	39.7	29.0	28.0
1950	1,918.1	174.8	184.3	222.0	54.1	0.0	2,314.1	76.0	99.0	32.0	55.2
1951	2,756.8	182.0	122.4	230.0	57.3	0.0	2,319.1	79.1	106.9	35.0	71.3
1952	3,187.3	268.6	218.2	250.0	78.4	0.0	2,343.9	80.3	116.5	38.0	75.0
1953	3,888.7	288.5	231.6	270.0	71.8	0.0	2,437.0	81.9	130.2	42.0	83.4
1954	4,589.6	307.7	153.7	292.0	65.7	0.0	2,527.7	84.9	139.2	45.0	81.7
1955	5,443.2	329.2	271.1	335.0	59.8	0.0	2,609.0	87.1	146.8	42.0	96.3
1956	6,190.9	347.3	296.5	375.0	56.0	0.0	2,682.5	89.8	153.6	43.0	102.3
1957	7,623.3	363.6	332.2	424.0	50.4	123.7	2,746.1	91.2	156.8	44.0	114.4
1958	8,738.1	383.3	369.8	465.0	44.3	205.1	2,806.2	92.6	170.2	46.0	115.7
1959	9,631.0	405.4	401.6	500.0	38.8	377.9	2,895.4	95.6	180.5	50.0	118.7
1960	10,309.7	440.0	442.2	535.0	33.2	542.6	2,976.0	96.6	192.2	55.0	121.1
1961	11,127.5	463.7	497.3	575.0	28.8	891.7	3,078.2	99.2	204.9	58.0	128.5
1962	12,248.2	474.1	549.4	600.0	24.3	1,161.0	3,125.9	99.6	218.9	61.0	135.7
1963	13,038.1	489.2	618.3	650.0	20.5	1,380.0	3,160.2	100.9	230.7	65.0	144.6
1964	13,588.8	495.0	687.4	690.0	16.9	1,518.5	3,180.2	102.2	244.2	70.0	146.5
1965	13,918.2	498.4	747.3	725.0	14.0	1,653.9	3,202.9	102.5	257.1	69.0	148.9
1966	14,670.3	525.1	832.2	775.0	11.3	1,883.3	3,173.0	100.3	274.1	72.0	152.1
1967	15,665.4	530.9	899.5	832.0	9.1	2,057.4	3,173.0	100.3	287.4	75.0	157.0
1968	16,062.4	541.9	974.8	903.0	7.1	2,257.3	3,156.9	99.1	298.1	80.0	164.4
1969	16,430.4	550.3	1,044.0	978.0	5.5	2,416.2	3,154.6	96.5	315.2	87.0	172.3
1970	16,869.6	552.5	1,119.4	1,085.0	3.1	2,572.7	3,178.0	95.1	332.8	86.0	180.9
1971	17,402.5	557.9	1,210.1	1,165.0	2.4	2,806.6	3,220.0	95.6	349.6	89.0	178.0
1972	17,953.3	560.1	1,301.7	1,241.0	1.8	3,097.3	3,267.1	97.3	364.2	92.0	171.9
1973	18,685.7	558.8	1,424.9	1,320.0	1.3	3,408.8	3,255.5	99.6	381.7	95.0	177.2
1974	19,408.9	554.0	1,556.3	1,395.0	1.0	3,712.3	3,240.3	101.7	401.7	104.0	181.7
1975	20,014.5	579.4	1,644.1	1,480.0	0.6	4,142.1	3,226.1	101.7	421.2	105.0	175.7
1976	20,624.3	587.2	1,755.6	1,580.0	0.4	4,523.6	3,235.4	100.8	437.8	110.0	176.7
1977	21,239.0	591.6	1,822.6	1,837.0	0.2	4,750.4	3,262.8	99.8	459.4	152.0	171.5
1978	21,832.4	594.2	1,903.8	1,959.0	—	4,865.7	3,273.0	15.7	480.6	169.0	175.4
1979	22,421.1	591.7	2,051.0	2,097.0	—	4,822.7	3,241.6	14.4	486.9	181.0	189.3
1980	22,267.3	589.4	2,062.0	2,146.0	—	4,728.7	3,193.9	95.2	511.5	208.0	199.2
1981	23,612.3	576.7	2,136.9	2,275.0	—	4,599.2	3,145.0	93.6	521.5	229.0	224.2
1982	24,148.2	584.4	2,190.7	2,404.0	—	4,173.8	3,008.0	91.6	528.5	250.0	216.4
1983	24,749.3	580.4	2,254.2	2,403.0	—	3,874.9	3,030.0	89.2	540.0	246.0	223.7
1984	25,237.0	592.0	2,318.4	2,809.1	—	3,808.0	2,985.0	87.3	507.0	222.6	191.4
1985	25,739.0	566.3	2,405.7	2,912.0	—	3,808.0	2,933.2	85.3	476.1	223.0	169.4
1986	26,156.6	575.4	2,464.5	3,089.0	—	3,715.2	2,893.7	83.7	469.7	212.0	147.5
1987	26,755.0	567.6	2,498.9	3,269.0	—	4,034.0	2,850.0	82.7	461.7	196.0	151.6
1988	27,168.0	561.7	2,573.8	3,302.0	—	4,047.0	2,811.0	81.7	453.9	198.0	156.7

Note appears at end of table

(continued)

TABLE Bf326-348 Social insurance and veterans' programs – beneficiaries: 1940-1988 *Continued*

Year	Disability programs		Survivor programs						Unemployment programs			
	Railroad temporary disability	Black lung	Public employees						State unemployment insurance	Railroad unemployment insurance	Veterans' unemployment allowances	Training and related allowances
			OASDHI	Railroad	State and local		Veterans	Black lung				
	Bf337	Bf338	Bf339	Bf340	Bf341	Bf342	Bf343	Bf344	Bf345	Bf346	Bf347	Bf348
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	
1940	—	—	35.7	3.0	(Z)	25.0	323.2	—	982.4	41.5	—	—
1941	—	—	168.5	3.6	(Z)	26.0	318.5	—	523.0	22.4	—	—
1942	—	—	255.1	3.8	(Z)	28.0	315.9	—	192.6	3.3	—	—
1943	—	—	341.5	4.1	(Z)	29.0	322.7	—	64.4	0.7	—	—
1944	—	—	402.8	4.2	0.2	30.0	342.0	—	79.3	0.8	10.1	—
1945	—	—	533.5	4.4	0.3	32.0	537.3	—	465.0	3.3	88.9	—
1946	—	—	661.0	4.5	0.4	34.0	790.5	—	1,152.2	52.7	1,359.3	—
1947	23.6	—	767.4	40.5	0.4	35.0	901.5	—	852.4	52.6	760.6	—
1948	33.2	—	872.4	101.6	2.0	36.0	950.0	—	821.1	38.2	434.9	—
1949	33.6	—	983.9	121.8	9.4	38.0	971.2	—	1,666.1	120.4	387.5	—
1950	31.2	—	1,093.9	136.3	18.3	40.0	991.2	—	1,305.0	76.4	32.1	—
1951	28.9	—	1,286.8	146.8	30.2	42.0	1,011.2	—	796.9	29.0	2.8	—
1952	31.5	—	1,484.6	149.9	40.0	44.0	1,044.2	—	873.6	42.6	15.1	—
1953	33.2	—	1,687.5	157.7	50.4	46.0	1,086.0	—	812.1	40.2	33.5	—
1954	31.5	—	1,891.9	167.2	61.5	48.0	1,122.2	—	1,614.9	110.4	89.3	—
1955	31.9	—	2,096.6	196.5	71.9	50.0	1,154.2	—	1,099.5	63.2	72.4	—
1956	30.3	—	2,282.3	210.6	82.9	53.0	1,173.9	—	1,037.0	47.6	50.7	—
1957	30.7	—	2,633.0	220.7	65.4	55.0	1,176.9	—	1,250.2	59.6	44.6	—
1958	30.5	—	2,912.2	231.3	109.2	57.0	1,187.9	—	2,771.9	129.8	67.2	—
1959	29.1	—	3,189.3	242.3	140.1	58.0	1,210.4	—	1,762.6	79.1	14.4	—
1960	28.0	—	3,446.0	251.3	153.4	70.0	1,262.0	—	1,723.0	74.0	1.6	—
1961	29.7	—	3,770.7	259.3	167.1	76.0	1,492.7	—	2,581.5	96.1	—	0.2
1962	28.2	—	3,965.7	265.2	180.8	78.0	1,595.5	—	1,729.0	66.0	—	2.9
1963	27.4	—	4,226.8	275.0	195.6	85.0	1,706.7	—	1,622.9	49.6	—	21.2
1964	25.8	—	4,458.7	282.5	212.0	90.0	1,814.5	—	1,439.7	39.4	—	50.7
1965	23.5	—	4,680.8	288.4	226.8	92.0	1,899.7	—	1,188.5	31.1	—	74.8
1966	21.5	—	5,227.9	294.6	241.9	98.0	1,970.0	—	960.7	22.6	—	65.0
1967	19.6	—	5,511.4	305.9	258.3	108.0	2,041.2	—	1,059.6	25.9	—	67.4
1968	19.7	—	5,823.7	314.6	275.7	110.0	2,253.1	—	986.7	21.0	—	61.4
1969	24.6	—	6,115.0	318.9	290.7	115.0	2,175.6	—	976.0	16.7	—	52.1
1970	24.9	25.1	6,369.3	324.3	306.9	120.0	2,284.1	1.5	1,620.3	17.7	—	60.0
1971	20.5	132.1	6,587.8	326.3	326.2	125.0	2,332.5	64.9	1,959.9	43.3	—	70.0
1972	17.9	165.0	6,826.5	332.3	345.6	130.0	2,390.5	84.5	1,698.1	21.6	—	48.4
1973	14.9	274.4	7,023.3	334.4	364.6	135.0	2,367.7	126.5	1,465.5	14.1	—	45.8
1974	14.4	336.4	7,197.2	335.5	392.1	146.0	2,294.6	146.5	1,984.2	9.7	—	18.7
1975	14.0	333.2	7,301.8	337.6	414.5	145.0	2,257.5	151.6	3,514.7	25.9	—	—
1976	17.9	321.1	7,416.1	337.0	436.0	150.0	2,220.7	156.0	2,595.0	28.2	—	—
1977	17.0	298.4	7,516.7	337.0	452.9	282.0	2,191.3	159.0	2,298.1	21.6	—	—
1978	15.7	281.0	7,560.7	335.1	472.8	290.0	2,137.8	159.0	2,028.5	25.2	—	—
1979	14.4	268.6	7,591.0	332.8	510.8	311.0	1,982.9	161.2	2,112.0	18.0	—	—
1980	14.5	252.2	8,259.7	330.1	509.9	253.0	1,464.9	157.8	2,830.0	38.0	—	—
1981	13.7	162.7	7,635.2	326.1	541.4	248.0	1,374.0	213.8	3,191.0	52.0	—	—
1982	13.5	146.7	7,434.5	324.1	567.6	243.0	1,300.0	207.8	3,897.0	77.0	—	—
1983	12.9	133.8	7,310.3	310.2	596.3	246.0	1,227.0	199.5	2,337.0	43.0	—	—
1984	11.3	172.0	7,196.0	321.7	593.9	242.3	1,157.0	151.1	2,167.0	29.2	—	—
1985	11.4	155.8	7,162.0	310.8	615.4	243.0	1,081.8	147.8	2,409.0	26.5	—	—
1986	12.0	140.5	7,126.8	289.1	644.3	237.0	1,035.3	144.0	2,391.0	24.0	—	—
1987	11.0	126.9	7,184.0	285.0	664.0	233.0	979.0	139.9	2,032.0	17.0	—	—
1988	10.3	114.1	7,222.0	279.1	688.0	235.0	932.0	135.4	1,833.0	13.3	—	—

(Z) Fewer than fifty beneficiaries.

Sources

U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement*, For the years 1985-1988: 1990, pp. 106-7; for 1970, 1980, 1983-1985: 1987, pp. 256-7; for 1982: 1986, pp. 252-3; for 1981: 1984-1985, pp. 223-4; for 1975, 1978, 1979: 1982, pp. 220-1; for 1977: 1981, pp. 66-7; for 1976: 1980, pp. 67-68; for 1973-1974: 1975, p. 50; for 1972: 1974, p. 47; for 1971: 1973, pp. 43-4; for 1940, 1950, 1955, 1960, 1965, 1970-1972: 1973, p. 43; for 1969: 1970, p. 29; for 1966, 1967: 1968, p. 28; for 1962-1964: 1965, p. 6; for 1961: 1964, p. 6; for 1958-1959: 1962, p. 6; for 1956-1957: 1960, p. 6; for 1951-1954: 1957, p. 14; for 1944-1949:

1952, p. 27; for 1943: 1946, p. 3; for 1942: 1945, p. 18; for 1941: 1944, p. 23. The U.S. Social Security Administration stopped publishing this table in the *Annual Statistical Supplement* after the 1990 issue.

The U.S. Social Security Administration stopped publishing the data for Tables Bf290-348 in the *Annual Statistical Supplement* after the 1990 issue. More recent data at higher levels of aggregation are available in Table Bf364-376 and are published in the quarterly *Social Security Bulletin*, Table 4.A2. Most of the data are derived from operating statistics of the administering agencies.

Documentation

See the text for Table Bf290-325.

TABLE Bf349-363 Social insurance and veterans' programs - cash benefits: 1940-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Retirement, disability, and survivor benefits												Supplemental Security Income payments		
	Paid on monthly basis						Lump-sum payments		Temporary disability benefits						
	Public employee retirement			Veterans' pensions and compensation			OASDI	BF355	BF356	Unemployment benefits		Workers' compensation benefits		Public assistance payments	
	Railroad retirement	Federal civil service	Other	Other	Under state laws	Railroad				Under state laws	Railroad	Under state laws			Railroad
BF349	BF350	BF351	BF352	BF353	BF354	BF355	BF356	BF357	BF358	BF359	BF360	BF361	BF362	BF363	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1940	2,171	24	116	62	183	424	12	25	519	16	—	—	161	—	—
1950	8,395	928	298	184	600	2,224	33	54	1,408	60	89	28	415	631	—
1960	25,564	11,081	942	805	1,793	3,437	164	135	2,867	158	311	57	860	2,954	—
1970	59,323	31,570	1,756	2,797	6,369	5,480	294	289	4,184	39	645	56	1,981	4,864	—
1980	227,884	120,272	4,867	15,043	25,559	11,358	250	606	18,757	176	1,300	63	9,632	12,144	7,858
1985	328,304	186,083	6,265	22,841	40,028	14,084	143	680	14,639	134	1,808	47	15,170	15,276	11,107
1990	434,753	244,757	7,259	29,396	58,349	15,717	131	212	18,059	61	3,099	58	23,029	19,272	15,175
1991	478,224	264,216	7,571	31,777	63,317	16,246	132	284	25,450	67	3,731	56	25,694	21,227	18,503
1992	507,013	281,393	7,748	30,691	69,209	16,316	88	188	24,967	60	3,858	52	27,754	22,329	22,324
1993	—	296,156	7,904	32,948	76,096	16,865	81	110	21,547	51	3,101	49	27,618	21,038	24,730
1994	—	311,496	8,002	35,715	81,447	18,747	94	113	21,646	45	3,201	56	27,426	23,270	26,078
1995	—	326,671	8,085	37,689	88,015	17,975	119	116	22,010	40	3,189	55	26,750	22,712	27,871
1996	—	341,011	8,129	39,170	91,170	18,129	127	123	21,751	42	—	51	—	—	29,388
1997	—	355,550	8,224	41,223	—	—	128	108	19,771	43	—	61	—	—	31,427

Source

U.S. Social Security Administration, *Social Security Bulletin* 62 (4) (1999), Table 4.A1, p. 81. The Social Security Administration bases the information on reports of administrative agencies on a checks-issued basis (including retroactive payments) where available.

Documentation

This table and Table Bf364-376 provide overviews of various public income-maintenance programs. They are companions to Tables Bf290-348. The U.S. Social Security Administration stopped publishing the more disaggregated data for Tables Bf290-348 in the *Annual Statistical Supplement* after the 1990 issue. This table provides a more aggregated and updated version of the same data. These are the series that, as of 1999, are being updated in the quarterly *Social Security Bulletin*. In published sources, the U.S. Social Security Administration does not report revisions for years prior to 1990 except for years divisible by 5 and 10. The public income-maintenance payments include payments outside the United States and benefits to spouses and children where applicable.

Series Bf349. Emergency relief funds of \$1630.3 million are included in the 1940 total and not included elsewhere. Includes training allowances to unemployed workers under Area Redevelopment Act and manpower Development and Training Act for 1961-1975, not shown separately. Beginning December 1980, the series also includes public assistance revisions for 1940-1979.

Series Bf350. Retirement and survivor benefits beginning in 1940; disability benefits beginning in 1957. Beginning October 1966, includes special benefits authorized by 1966 legislation for

persons aged 72 or older not insured under the regular or transitional provisions of the Social Security Act.

Series Bf351. Includes annuities to widows under joint-and-survivor elections before 1947. Beginning February 1967, includes supplemental annuities for career railroad employees.

Series Bf352-353. Excludes refunds of contributions to employees who leave service.

Series Bf352. Beginning January 1988, includes both Civil Service Retirement System and Federal Employee Retirement System benefits. Beginning 1994, includes annual data only.

Series Bf353. Represents federal contributory systems other than civil service, federal noncontributory systems for civilian employees and career military personnel, and systems for state and local employees.

Series Bf354. Payments to veterans and survivors of deceased veterans, including special allowances for survivors of veterans who did not qualify under Old-Age, Survivors, Disability, and Health Insurance (OASDHI); Servicemen's and Veteran's Survivor Benefit Act of 1956) and through June 1973, subsistence payments to disabled veterans undergoing training.

Series Bf355-356. The lump-sum payments are death payments.

Series Bf356. Includes annual and monthly payments for Railroad Retirement, veteran's programs, and federal civil service retirement. For "other" public employee systems, includes annual data only. Lump-sum data are not available for state and local retirement systems after 1986. Beginning 1993, annual data include civil service and Railroad Retirement only.

TABLE Bf349–363 Social insurance and veterans’ programs – cash benefits: 1940–1997 *Continued*

Series Bf357. Annual and monthly totals include regular state Unemployment Insurance program and payments made by states as agents of the federal government under the Federal Employees’ Unemployment Compensation program and under the Ex-Servicemen’s Compensation Act of 1958. Annual data are only for payments under Servicemen’s Readjustment Act of 1944, Veterans’ Readjustment Act of 1962, Trade Expansion Act of 1962, Disaster Relief Act of 1970, and the Temporary and Permanent Extended Unemployment Insurance programs. Beginning in 1961, includes program in Puerto Rico. Beginning in 1981, state Unemployment Insurance and Ex-Servicemen’s Compensation Act only. Beginning July 1987, state programs only.

Series Bf358–359. Benefits in Rhode Island (from 1943), in California (from 1947), in New Jersey (from 1949), in New York (from 1950), in Puerto Rico (from 1970), in Hawai’i (from 1972), including payments under private plans where applicable.

Series Bf360. Benefits began in 1947.

Series Bf361. Workers’ compensation benefits include those under federal workers’ compensation laws and under state laws paid by private insurance

carriers, state funds, and self-insurers. Beginning in 1959, includes data for Alaska and Hawai’i. Monthly data refer only to federal Black Lung Benefits administered by the Social Security Administration (starting in 1970).

Series Bf362. Includes Aid to Families with Dependent Children and General Assistance. Through 1973, includes Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled (see text for series Bf363). Includes payments to intermediate-care facilities (July 1968–December 1971) and payments for emergency assistance, beginning July 1969. Includes money payments under medical assistance for the aged (1960–1969). Excludes medical vendor payments. Starting in 1974, includes money payments to the aged, blind, and disabled in Guam, Puerto Rico, and the Virgin Islands under federally aided public assistance programs.

Series Bf363. The Supplemental Security Income program supersedes the public assistance programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled in the fifty states and the District of Columbia, beginning in 1974 – beginning in 1978, in the Northern Mariana Islands. Annual totals include payments under state-administered supplementation programs.

TABLE Bf364–376 Public income-maintenance programs – beneficiaries of cash payments: 1940–1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Retirement and disability programs					Survivor programs				Railroad temporary disability	Unemployment programs		
	OASDI		Railroad	Federal civil		OASDI	Railroad	Federal civil			Under state laws	Railroad	Black lung
	Retirement	Disability		service	Veterans’			Veterans’	service	Veterans’			
	Bf364	Bf365	Bf366	Bf367	Bf368	Bf369	Bf370	Bf371	Bf372	Bf373	Bf374	Bf375	Bf376
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	
1940	148	—	146	65	610	74	3	—	323	—	667	74	—
1950	2,326	—	256	161	2,366	1,152	142	25	1,010	32	838	35	—
1960	10,599	687	553	379	3,064	3,558	256	154	1,393	34	2,165	102	—
1970	17,096	2,665	653	697	3,210	6,468	326	308	2,301	22	2,045	21	—
1980	23,336	4,685	685	1,296	3,189	7,601	330	450	1,748	16	2,830	38	400
1985	25,991	3,907	652	1,454	2,924	7,160	311	501	1,067	12	2,409	29	295
1986	26,551	3,993	641	1,489	2,876	7,164	306	516	1,006	12	2,391	24	276
1987	26,995	4,945	633	1,518	2,836	7,150	302	532	955	1	2,032	17	259
1988	27,384	4,074	627	1,543	2,797	7,169	296	548	911	9	1,736	8	242
1989	27,853	4,129	622	1,585	2,771	7,169	290	561	868	7	1,716	8	226
1990	38,368	4,266	613	1,590	2,741	7,198	284	562	831	7	2,596	9	211
1991	28,819	4,513	602	1,616	2,700	7,260	278	573	790	8	2,849	9	196
1992	29,302	4,890	590	1,647	2,673	7,315	270	589	775	7	2,620	6	182
1993	29,634	5,254	576	1,681	2,658	7,358	264	607	706	7	2,349	6	168
1994	29,914	5,584	560	1,666	2,660	7,385	257	597	678	6	2,088	4	155
1995	30,141	5,858	542	1,704	2,668	7,388	250	607	656	6	2,099	5	144
1996	30,311	6,072	528	1,716	—	7,354	241	618	—	6	2,197	3	131
1997	30,638	6,153	512	1,731	—	7,180	233	621	—	6	2,076	3	119

Source

U.S. Social Security Administration, *Social Security Bulletin* 62 (4) (1999), Table 4.A2, p. 82. The U.S. Social Security Administration bases the information on reports of administrative agencies.

Documentation

This is a companion table to Tables Bf290–363. See the text for Table Bf349–363 for further details on programs.

Series Bf364–366. Beneficiaries include auxiliaries or dependents.

Series Bf364. Beginning October 1966, Old-Age, Survivors, and Disability Insurance (OASDI) retirement benefits include special benefits authorized by 1966 legislation for persons aged 72 or older and not insured under the regular or transitional provisions of the Social Security Act.

Series Bf367. Beginning January 1988, includes both Civil Service Retirement System and Federal Employee Retirement System beneficiaries.

Series Bf372. Monthly number at end of quarter.

Series Bf373 and Bf375. Average number during fourteen-day registration period.

Series Bf374. Average weekly number in December. Includes regular state Unemployment Insurance, the Federal Employees’ Unemployment Compensation program, and the Ex-Servicemen’s Compensation program through 1981. Excludes federal employees’ program thereafter. Beginning July 1987, includes state programs only.

Series Bf376. Includes dependents and survivors. Data refer only to programs administered by the U.S. Social Security Administration.

TABLE Bf377-394 Old-Age, Survivors, Disability, and Health Insurance – covered workers, earnings, employers, and tax rates: 1937-1999

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Workers fully insured for retirement and/or survivor benefits				Workers reported with taxable earnings			Earnings	
	Total	Permanently insured	Workers insured in event of disability	Living workers (estimated)	Total	With maximum taxable earnings	New entrants into covered employment	Total in covered employment	Reported taxable earnings
	Bf377	Bf378	Bf379	Bf380	Bf381	Bf382	Bf383	Bf384	Bf385
	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Million dollars	Million dollars
1937	—	—	—	—	32,904	1,031	32,904	32,200	29,620
1938	—	—	—	—	31,822	—	3,930	28,497 ²	26,502
1939	—	—	—	—	33,751	—	4,450	32,226 ²	29,745
1940	24,200	1,100	—	40,700	35,390	1,196	4,430	35,700	32,970
1941	25,800	1,400	—	44,800	40,980	—	6,440	45,489 ²	41,850
1942	28,100	1,800	—	50,900	46,360	—	7,960	58,176 ²	52,940
1943	29,900	2,300	—	58,500	47,660	—	7,340	69,665 ²	62,420
1944	31,900	2,800	—	65,400	46,300	—	4,690	73,299 ²	64,430
1945	33,400	3,400	—	69,600	46,390	6,361	3,480	71,600	62,950
1946	35,400	8,600	—	72,400	48,840	6,477	3,080	79,300	69,090
1947	37,300	11,600	—	75,200	48,910	9,620	2,680	92,400	78,370
1948	38,900	13,200	—	77,400	49,020	12,061	2,640	102,300	84,120
1949	40,100	14,900	—	79,400	46,800	11,740	1,960	100,000	81,810
1950	59,800	21,000	—	80,800	48,280	13,936	2,520	109,800	87,500
1951	62,800	22,900	—	82,700	58,120	14,270	6,000	148,900	120,770
1952	68,200	25,600	—	88,000	59,580	16,606	3,500	159,900	128,640
1953	71,000	27,700	—	90,800	60,840	19,013	3,090	173,000	135,870
1954	70,200	29,900	31,900	93,100	59,610	18,866	2,360	171,900	133,520
1955	70,500	32,500	35,400	94,700	65,200	16,704	4,760	196,100	157,540
1956	74,000	36,100	37,200	98,600	67,610	19,236	3,660	216,800	170,720
1957	76,100	38,300	38,400	101,400	70,590	21,095	3,380	233,900	181,380
1958	76,500	40,300	43,400	103,800	69,770	21,328	2,450	236,500	180,720
1959	76,700	42,200	46,400	105,300	71,700	19,112	3,180	255,000	202,310
1960	84,400	47,600	48,500	107,400	72,530	20,310	3,130	265,200	207,000
1961	88,500	53,300	50,500	109,400	72,820	21,265	2,990	270,700	209,640
1962	89,800	54,900	51,500	111,200	74,820	23,154	3,360	289,000	219,050
1963	91,300	56,600	52,300	113,300	75,540	24,570	3,520	302,300	225,550
1964	92,800	58,300	53,300	115,600	77,430	26,717	3,890	324,500	236,390
1965	94,800	60,200	55,000	118,100	80,680	29,136	4,620	351,700	250,730
1966	97,200	61,900	55,700	121,300	84,600	20,498	5,080	390,700	312,540
1967	99,900	63,300	56,900	125,000	87,040	22,948	4,530	422,300	329,960
1968	102,600	64,500	70,100	127,900	89,380	19,120	4,830	460,000	375,840
1969	105,000	65,700	72,400	130,800	92,060	22,577	5,160	502,800	402,550
1970	108,300	67,300	74,500	133,500	93,090	24,224	4,440	531,600	415,600
1971	110,800	68,500	76,100	135,900	93,340	26,404	4,470	559,700	426,960
1972	113,500	69,800	77,800	138,200	96,240	24,074	5,150	617,900	484,110
1973	116,800	71,300	80,400	140,600	99,830	20,250	5,670	686,700	561,850
1974	120,200	72,700	83,300	142,900	101,330	15,310	4,940	746,700	636,760
1975	123,100	74,300	85,300	145,200	100,200	15,070	4,120	787,600	664,660
1976	126,000	76,100	87,000	148,300	102,600	15,330	4,700	874,700	737,700
1977	129,000	78,100	89,300	151,000	105,800	15,700	5,070	960,100	816,550
1978	133,300	80,300	93,700	153,700	110,600	17,050	5,460	1,092,600	915,600
1979	137,300	83,000	98,000	156,400	112,700	11,236	4,883	1,222,200	1,067,000
1980	140,400	85,300	100,300	159,000	113,000	9,903	4,243	1,328,800	1,180,700
1981	142,900	88,000	102,600	161,500	113,000	8,594	4,090	1,450,900	1,294,100
1982	144,700	90,700	104,500	164,000	111,800	7,929	3,408	1,516,600	1,365,300
1983	146,500	94,000	105,400	—	112,100	7,044	3,914	1,615,200	1,454,100
1984	148,300	96,900	107,100	—	116,300	7,421	4,743	1,800,800	1,608,800
1985	150,900	100,000	109,600	—	119,800	7,766	4,756	1,936,800	1,722,600
1986	153,200	103,300	111,600	—	122,900	7,624	4,641	2,081,800	1,844,400
1987	155,700	107,400	113,500	—	125,600	7,735	4,956	2,237,000	1,960,000
1988	158,300	110,600	115,700	—	129,600	8,483	5,489	2,432,800	2,088,400
1989	161,300	113,600	118,100	—	131,700	8,110	4,856	2,578,700	2,239,500

Notes appear at end of table

(continued)

TABLE Bf377-394 Old-Age, Survivors, Disability, and Health Insurance – covered workers, earnings, employers, and tax rates: 1937-1999 *Continued*

Year	Workers fully insured for retirement and/or survivor benefits			Living workers (estimated)	Workers reported with taxable earnings			Earnings		
	Total	Permanently insured	Workers insured in event of disability		Total	With maximum taxable earnings	New entrants into covered employment	Total in covered employment	Reported taxable earnings	
	Bf377	Bf378	Bf379		Bf380	Bf381	Bf382	Bf383	Bf384	Bf385
	Thousand	Thousand	Thousand		Thousand	Thousand	Thousand	Thousand	Million dollars	Million dollars
1990	164,000	116,400	120,100	—	133,600	7,575	4,012	2,703,800	2,358,000	
1991	165,900	118,800	121,500	—	133,000	7,483	3,541	2,760,500	2,422,500	
1992	167,500	121,100	122,900	—	134,000	7,667	3,918	2,917,800	2,532,900	
1993	169,100	123,600	124,400	—	136,100	7,617	4,204	3,022,900	2,636,100	
1994	170,800	125,900	126,200	—	138,200	7,517	4,570	3,169,100	2,785,200	
1995	173,000	128,300	128,100	—	141,000	8,192	4,612	3,359,100	2,919,900	
1996	175,200	130,800	129,900	—	143,500	8,654	4,611	3,568,200	3,075,600	
1997	177,500	133,400	132,000	—	146,700	—	—	3,852,600	3,291,000	
1998	179,500	135,700	133,800	—	148,500	—	—	4,120,500	3,512,100	
1999	181,800	137,900	136,000	—	—	—	—	—	—	

Notes appear at end of table

(continued)

Year	Annual maximum taxable earnings per worker			Contribution rate						
	Under OASDI	Under HI (Medicare)	Employers reporting taxable wages	For employer and employee each			For self-employed persons			
				Old-Age, Survivors Insurance (OASI)	Disability Insurance (DI)	Health Insurance (HI)	Old-Age, Survivors Insurance (OASI)	Disability Insurance (DI)	Health Insurance (HI)	
				Bf386 ¹	Bf387 ¹	Bf388	Bf389	Bf390	Bf391	Bf392
Dollars	Dollars	Thousand	Percent	Percent	Percent	Percent	Percent	Percent	Percent	
1937	3,000	—	2,420	1.000	—	—	—	—	—	—
1938	3,000	—	2,240	1.000	—	—	—	—	—	—
1939	3,000	—	2,370	1.000	—	—	—	—	—	—
1940	3,000	—	2,500	1.000	—	—	—	—	—	—
1941	3,000	—	2,650	1.000	—	—	—	—	—	—
1942	3,000	—	2,660	1.000	—	—	—	—	—	—
1943	3,000	—	2,390	1.000	—	—	—	—	—	—
1944	3,000	—	2,470	1.000	—	—	—	—	—	—
1945	3,000	—	2,610	1.000	—	—	—	—	—	—
1946	3,000	—	3,020	1.000	—	—	—	—	—	—
1947	3,000	—	3,250	1.000	—	—	—	—	—	—
1948	3,000	—	3,300	1.000	—	—	—	—	—	—
1949	3,000	—	3,320	1.000	—	—	—	—	—	—
1950	3,000	—	3,350	1.500	—	—	—	—	—	—
1951	3,600	—	4,700	1.500	—	—	2.2500	—	—	—
1952	3,600	—	4,740	1.500	—	—	2.2500	—	—	—
1953	3,600	—	4,700	1.500	—	—	2.2500	—	—	—
1954	3,600	—	4,720	2.000	—	—	3.0000	—	—	—
1955	4,200	—	4,910	2.000	—	—	3.0000	—	—	—
1956	4,200	—	5,240	2.000	—	—	3.0000	—	—	—
1957	4,200	—	5,190	2.000	0.250	—	3.0000	0.3750	—	—
1958	4,200	—	5,270	2.000	0.250	—	3.0000	0.3750	—	—
1959	4,800	—	5,520	2.250	0.250	—	3.3750	0.3750	—	—
1960	4,800	—	5,670	2.750	0.250	—	4.1250	0.3750	—	—
1961	4,800	—	5,860	2.750	0.250	—	4.1250	0.3750	—	—
1962	4,800	—	5,910	2.875	0.250	—	4.3250	0.3750	—	—
1963	4,800	—	6,000	3.375	0.250	—	5.0250	0.3750	—	—
1964	4,800	—	6,090	3.375	0.250	—	5.0250	0.3750	—	—
1965	4,800	—	6,090	3.375	0.250	—	5.0250	0.3750	—	—
1966	6,600	6,600	5,990	3.500	0.350	0.35	5.2750	0.5250	0.35	0.35
1967	6,600	6,600	5,920	3.550	0.350	0.50	5.3750	0.5250	0.50	0.50
1968	7,800	7,800	5,820	3.325	0.475	0.60	5.0875	0.7125	0.60	0.60
1969	7,800	7,800	5,790	3.725	0.475	0.60	5.5875	0.7125	0.60	0.60

Notes appear at end of table

(continued)

TABLE Bf377-394 Old-Age, Survivors, Disability, and Health Insurance – covered workers, earnings, employers, and tax rates: 1937-1999

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Annual maximum taxable earnings per worker		Contribution rate						
	Under OASDI	Under HI (Medicare)	Employers reporting taxable wages	For employer and employee each			For self-employed persons		
				Old-Age, Survivors Insurance (OASI)	Disability Insurance (DI)	Health Insurance (HI)	Old-Age, Survivors Insurance (OASI)	Disability Insurance (DI)	Health Insurance (HI)
				Bf386 ¹	Bf387 ¹	Bf388	Bf389	Bf390	Bf391
Dollars	Dollars	Thousand	Percent	Percent	Percent	Percent	Percent	Percent	Percent
1970	7,800	7,800	5,690	3.650	0.550	0.60	5.4750	0.8250	0.60
1971	7,800	7,800	5,760	4.050	0.550	0.60	6.0750	0.8250	0.60
1972	9,000	9,000	5,710	4.050	0.550	0.60	6.0750	0.8250	0.60
1973	10,800	10,800	5,760	4.300	0.550	1.00	6.2050	0.7950	1.00
1974	13,200	13,200	5,750	4.375	0.575	0.90	6.1850	0.8150	0.90
1975	14,100	14,100	5,720	4.375	0.575	0.90	6.1850	0.8150	0.90
1976	15,300	15,300	5,840	4.375	0.575	0.90	6.1850	0.8150	0.90
1977	16,500	16,500	5,920	4.375	0.575	0.90	6.1850	0.8150	0.90
1978	17,700	17,700	—	4.275	0.775	1.00	6.0100	1.0900	1.00
1979	22,900	22,900	—	4.330	0.750	1.05	6.0100	1.0400	1.05
1980	25,900	25,900	—	4.520	0.560	1.05	6.2725	0.7775	1.05
1981	29,700	29,700	—	4.700	0.650	1.30	7.0250	0.9750	1.30
1982	32,400	32,400	—	4.575	0.825	1.30	6.8125	1.2375	1.30
1983	35,700	35,700	—	4.775	0.625	1.30	7.1125	0.9375	1.30
1984	37,800	37,800	—	5.200	0.500	1.30	10.4000	1.0000	2.60
1985	39,600	39,600	—	5.200	0.500	1.35	10.4000	1.0000	2.70
1986	42,000	42,000	—	5.200	0.500	1.45	10.4000	1.0000	2.90
1987	43,800	43,800	—	5.200	0.500	1.45	10.4000	1.0000	2.90
1988	45,000	45,000	—	5.530	0.530	1.45	11.0600	1.0600	2.90
1989	48,000	48,000	—	5.530	0.530	1.45	11.0600	1.0600	2.90
1990	51,300	51,300	—	5.600	0.600	1.45	11.2000	1.2000	2.90
1991	53,400	125,000	—	5.600	0.600	1.45	11.2000	1.2000	2.90
1992	55,500	130,200	—	5.600	0.600	1.45	11.2000	1.2000	2.90
1993	57,600	135,000	—	5.600	0.600	1.45	11.2000	1.2000	2.90
1994	60,600	—	—	5.260	0.940	1.45	10.5200	1.8800	2.90
1995	61,200	—	—	5.260	0.940	1.45	10.5200	1.8800	2.90
1996	62,700	—	—	5.260	0.940	1.45	10.5200	1.8800	2.90
1997	65,400	—	—	5.350	0.850	1.45	10.7000	1.7000	2.90
1998	68,400	—	—	5.350	0.850	1.45	10.7000	1.7000	2.90
1999	72,600	—	—	5.350	0.850	1.45	10.7000	1.7000	2.90

¹ Data in some years based on automatic adjustment. See text.² Data error in original source, which cannot be corrected.**Sources**

U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1997), Table 4.B1, p. 167, Table 4.C1, p. 178; (1999), Table 4.B1, p. 165, Table 4.C1, p. 176, Table 2.A3, p. 36. Series Bf380 and Bf388 are reported in the *Social Security Bulletin: Annual Statistical Supplement* (1981), pp. 84, 96 and (1987), p. 104.

Documentation

The Old-Age, Survivors, and Disability Insurance (OASDI) program provides monthly benefits to retired and disabled workers and their dependents and to survivors of insured workers. Benefits are paid as a matter of earned right to workers who gain insured status and to their eligible spouses, children, and survivors. A person builds protection under the OASDI program through taxes on earnings from employment covered under Social Security. In 1965, a comprehensive health insurance program (Medicare) for persons 65 years old and older was established. The program consists of a compulsory hospital insurance plan covering hospital and related services and a voluntary supplementary medical insurance plan covering physicians' and related medical services. The hospital insurance plan is financed through contributions

made while the individual is working (except that federal general revenues are used to finance the benefits for certain elderly persons who reach retirement age without becoming insured under the Social Security Act). The supplementary medical insurance plan is financed through voluntary contributions by the elderly matched by the federal government general revenues.

The national system of Old Age, Survivors, Disability, and Health Insurance (OASDHI) originally covered employees in industry and commerce. Beginning in 1951, coverage was extended to regularly employed agricultural and domestic workers, to most urban self-employed persons, and, on a voluntary group basis, to employees of nonprofit organizations and to employees of state and local governments not covered by separate retirement programs. During the 1950s, coverage was further extended to self-employed farmers and additional farmworkers, to most professional self-employed persons and, on a voluntary basis, to most state and local government employees covered by their own retirement system. As of January 1957, military personnel were covered on a compulsory basis. Free wage credits for military service from September 1940 through December 1956 are reflected in benefits paid during the years covered by the series (primarily in benefits to young survivors) but do not enter into the count of covered workers or taxable earnings. The additional cost of benefits paid as a result of these credits is met by transfers to the trust funds from general revenues. In 1965, self-employed

TABLE Bf377-394 Old-Age, Survivors, Disability, and Health Insurance – covered workers, earnings, employers, and tax rates: 1937-1999 *Continued*

doctors of medicine were covered, and in 1967 the previous elective coverage of ministers became compulsory unless exemption was claimed on grounds of conscience or religious principle.

When the OASDHI program began in 1937, fewer than 60 percent of all persons who worked in paid employment during an average week were covered. Following the 1950 amendments, the proportion rose to 75 percent and by 1970 was more than 90 percent. In the mid-1990s about 96 percent of all jobs in the United States were covered. Workers excluded from coverage fall into five major categories: (1) federal civilian employees hired before January 1, 1984, (2) railroad workers, (3) certain employees of state and local governments who are covered under a retirement system, (4) household workers and farm workers whose earnings do not meet certain minimum requirements, and (5) persons with very low net earnings from self-employment (generally less than \$400 annually). Federal civil servants hired prior to 1984 and railroad employees are covered, separately, by compulsory, contributory retirement systems of their own. The railroad system is closely coordinated with OASDHI.

To qualify for cash benefits, a worker must have worked a sufficient time in covered employment to have acquired an insured status (see series Bf377-379). Workers are considered “fully insured” when they meet the minimum requirements for insurance; they become “permanently insured” when they become eligible for a required-worker benefit. Workers are insured in the event of disability if they are considered fully insured and have contributed a sufficient amount to receive disability insurance. Under the 1939 amendments, workers were generally “fully insured” for benefits if they had worked in covered employment half the time after 1936 and before age 65 and had a minimum of six calendar quarters of coverage. Subsequent liberalizations permitted a person to become fully insured if he had been in covered work roughly equal to one fourth of the time between 1950 (or age 21, if later) and retirement age or death. Based on the rules in 1970, if a worker died before acquiring a fully insured status but was “currently insured” 1.5 years of employment out of the 3 preceding years, death-survivor benefits may be paid to his young widow with children. To be insured for disability benefits, circa 1970, a worker must generally have worked for at least five out of the ten years before onset of disability. The 1965 amendments eased the eligibility requirements for persons 72 years old and older who were not eligible for cash benefits by introducing a transitional insured status under which a special flat monthly benefit may be paid to persons with three to five quarters of coverage. A 1966 amendment extended these special monthly benefits to certain persons 72 years old and older who could not meet even these minimal requirements. Lump-sum payments became payable in 1937; monthly benefits, in 1940. The original Social Security Act provided for monthly old-age benefits only. Amendments adopted in 1939 added benefits for dependents and survivors of the insured worker. Benefits for disabled persons were added in 1956, and benefits for the dependents of disabled persons, in 1958. Beginning in 1966, the cost of rehabilitation services furnished to disability beneficiaries was also paid by the program. A complete discussion of insured status can be found in the *Social Security Bulletin: Annual Statistical Supplement*, 1997, p. 372.

Since 1940, the OASDHI program has been a pay-as-you-go system funded by taxes on earnings for wage and salary workers and the self-employed. An employer deducts Social Security contributions from a worker's pay and adds an equal amount for his tax as employer. The money is forwarded to the Internal Revenue Service and deposited into federal trust funds

from which the benefits and administrative expenses are paid. Self-employed persons pay their Social Security contributions with their federal income tax. For example, the information in series Bf386-394 shows that in 1990 a typical worker would pay a tax on earnings up to a maximum of \$51,300 of 5.6 percent for Old-Age, Survivors Insurance (OASI), start 0.6 percent for Disability Insurance (DI), and 1.4 percent for Medicare. The employer would pay the matching amount. The self-employed would pay both the worker and employer share, or 11.2 percent for OASI, 1.2 percent for DI, and 2.8 percent for Medicare. The Omnibus Budget Reconciliation Act of 1993 repealed the Medicare maximum so that now all earnings are subject to the Medicare tax. In 1984 the total contribution rate for OASDHI for employers and employees each (the sum of series Bf389-391) includes an automatic tax credit of 0.3 percent for remuneration paid in the calendar year 1984 under the Federal Insurance Contributions Act. During the period 1984 to 1989, the total contribution rate for OASDHI for self-employed (the sum of series Bf392-394) includes an automatic tax credit of 2.7 percent of earnings for self-employed income for taxable years beginning in 1984, 2.3 percent for taxable years beginning in 1985, and 2.0 percent for taxable years beginning in 1986, 1987, 1988, and 1989. During this period, scheduled taxes were credited to the Social Security Trust funds, monies for tax credits were paid from the Treasury, and the reduced tax rates were paid by employees and the self-employed. For more information, see *Social Security Bulletin, Annual Statistical Supplement*, 1997, Table 2.A4, p. 35. Unlike the income tax, the OASDHI taxes are drawn on the first dollar of earnings; however, the working poor receive some relief from the OASDHI payroll taxes through the earned income tax credit.

Series Bf380. The estimated total number of living workers is the estimated number of persons who had covered employment any time during the period from 1937 to the year shown. It is not adjusted to reflect the effect of provisions that coordinate the OASDHI and Railroad Retirement programs and wage credits for military service. It is only partially adjusted to eliminate duplicate counts of persons with taxable earnings reported on more than one Social Security number.

Series Bf381-385. Relate only to wage and salary workers for the period 1937-1950. Beginning in 1951, the data include self-employed workers and earnings.

Series Bf383. New entrants into covered employment are workers reported with first taxable earnings under the program in a specified year. During the period 1937-1994, 276.2 million different persons were reported with taxable earnings.

Series Bf382-383 and Bf385. Preliminary estimates are based on data from the Bureau of Labor Statistics and the National Income and Product Accounts.

Series Bf381-383, Bf385, and Bf387. Data for 1996 are preliminary estimates based on data from the Bureau of Labor Statistics and the National Income and Product Accounts.

Series Bf386-387. Data for 1975-1978, 1982-1989, and 1993-1996 are based on automatic adjustment under 1972a Act (as modified by 1973a and 1973b Acts), in proportion to increases in the average wage level. The maximum earnings taxable for HI in 1991 is based on 1990 legislation.

Series Bf388. No longer reported in statistical supplement after 1977.

TABLE Bf395-407 Old-Age and Survivors Insurance – benefits, by type of beneficiary: 1937-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Annual benefits paid to												
	Retired workers and dependents						Survivors					Special age-72 beneficiaries	Lump-sum death payments
	Total	Total	Total	Retired workers	Spouses	Children	Total	Surviving children	Widowed mothers and fathers	Widows and widowers	Parents		
	Bf395	Bf396	Bf397	Bf398	Bf399	Bf400	Bf401	Bf402	Bf403	Bf404	Bf405	Bf406	Bf407
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1937	1	—	—	—	—	—	—	—	—	—	—	—	1
1938	10	—	—	—	—	—	—	—	—	—	—	—	10
1939	14	—	—	—	—	—	—	—	—	—	—	—	14
1940	35	24	17	15	2	(Z)	6	3	2	(Z)	(Z)	—	9
1941	88	75	51	44	7	1	24	13	8	2	(Z)	—	13
1942	131	116	76	65	10	1	40	21	13	5	(Z)	—	15
1943	166	148	93	79	13	1	55	29	16	9	1	—	18
1944	209	187	113	97	16	1	73	39	20	14	1	—	22
1945	274	248	148	126	21	2	100	52	27	20	1	—	26
1946	378	350	222	189	31	2	128	66	32	28	1	—	28
1947	466	437	288	245	40	3	149	77	34	37	2	—	29
1948	556	524	352	300	49	4	172	86	36	48	2	—	32
1949	667	634	437	373	60	5	197	95	39	60	2	—	33
1950	961	928	651	557	88	6	277	135	49	89	3	—	33
1951	1,885	1,828	1,321	1,135	175	11	507	260	82	156	9	—	57
1952	2,194	2,131	1,539	1,328	200	12	592	298	92	191	10	—	63
1953	3,006	2,919	2,175	1,884	275	16	744	369	114	248	12	—	87
1954	3,670	3,578	2,698	2,340	338	21	880	430	133	304	13	—	92
1955	4,968	4,855	3,748	3,253	466	29	1,108	532	163	396	16	—	113
1956	5,715	5,605	4,361	3,793	536	33	1,244	581	177	469	17	—	109
1957	7,347	7,209	5,688	4,888	756	43	1,521	651	198	653	19	—	139
1958	8,327	8,194	6,474	5,567	851	56	1,720	720	223	757	20	—	133
1959	9,842	9,670	7,607	6,548	982	77	2,063	855	263	921	25	—	171
1960	10,677	10,512	8,196	7,053	1,051	92	2,316	945	286	1,057	28	—	164
1961	11,862	11,690	9,032	7,802	1,124	106	2,659	1,080	316	1,232	31	—	171
1962	13,356	13,173	10,162	8,813	1,216	134	3,011	1,171	336	1,470	34	—	183
1963	14,217	14,011	10,795	9,391	1,258	146	3,216	1,222	348	1,612	34	—	206
1964	14,914	14,698	11,281	9,854	1,277	150	3,416	1,275	354	1,754	33	—	216
1965	16,737	16,521	12,542	10,984	1,383	175	3,979	1,515	388	2,041	35	—	217
1966	18,267	18,030	13,373	11,727	1,429	216	4,613	1,812	415	2,351	35	44	237
1967	19,468	19,215	14,049	12,372	1,456	221	4,854	1,855	420	2,545	34	313	252
1968	22,642	22,373	16,204	14,278	1,673	253	5,839	2,207	478	3,117	37	330	269
1969	24,209	23,917	17,395	15,385	1,750	260	6,219	2,322	490	3,371	36	303	291
1970	28,796	28,503	20,770	18,438	2,029	303	7,428	2,760	574	4,055	39	305	294
1971	33,413	33,107	24,219	21,544	2,323	352	8,602	3,168	630	4,763	41	285	306
1972	37,122	36,802	27,057	24,143	2,532	382	9,428	3,433	679	5,326	43	263	320
1973	45,741	45,412	32,793	29,336	3,000	457	12,356	4,002	801	7,505	48	264	329
1974	51,618	51,291	37,211	33,369	3,309	533	13,843	4,399	898	8,497	49	237	327
1975	58,509	58,172	42,432	38,079	3,719	634	15,544	4,888	1,009	9,597	50	196	337
1976	65,699	65,366	47,936	43,083	4,117	736	17,257	5,336	1,113	10,757	51	174	332
1977	73,113	72,801	53,575	48,186	4,559	830	19,070	5,759	1,191	12,068	52	157	312
1978	80,352	80,008	59,159	53,255	4,983	921	20,707	6,093	1,284	13,278	51	142	344
1979	90,556	90,216	66,947	60,379	5,554	1,014	23,140	6,608	1,409	15,071	52	128	340
1980	105,074	104,678	77,905	70,358	6,405	1,142	26,654	7,389	1,572	17,638	55	119	394
1981	123,795	123,463	92,478	83,614	7,543	1,321	30,875	8,307	1,760	20,749	58	110	332
1982	138,800	138,596	104,885	95,123	8,539	1,223	33,612	8,204	1,861	23,488	59	100	203
1983	149,502	149,297	114,048	103,578	9,328	1,143	35,164	7,911	1,771	25,425	56	85	205
1984	157,862	157,651	120,952	109,957	9,860	1,135	36,628	7,775	1,474	27,325	53	71	212
1985	167,360	167,152	128,479	116,823	10,517	1,140	38,616	7,762	1,474	29,330	51	57	207
1986	176,845	176,642	135,902	123,584	11,152	1,166	40,693	7,843	1,457	31,345	48	47	203
1987	183,644	183,441	141,293	128,513	11,598	1,183	42,112	7,846	1,388	32,833	44	36	203
1988	195,522	195,314	150,498	136,987	12,292	1,219	44,787	8,120	1,392	35,233	43	29	208
1989	207,997	207,770	160,331	146,027	13,054	1,249	47,418	8,254	1,401	37,723	41	21	206

Note appears at end of table

(continued)

TABLE Bf395-407 Old-Age and Survivors Insurance – benefits, by type of beneficiary: 1937-1998 *Continued*

Year	Annual benefits paid to													
	Retired workers and dependents						Survivors						Special age-72 beneficiaries	Lump-sum death payments
	Total	Total	Total	Retired workers	Spouses	Children	Total	Surviving children	Widowed mothers and fathers	Widows and widowers	Parents			
	Bf395	Bf396	Bf397	Bf398	Bf399	Bf400	Bf401	Bf402	Bf403	Bf404	Bf405	Bf406		
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars		
1990	222,993	222,787	172,025	156,756	13,953	1,316	50,746	8,564	1,437	40,705	39	16	206	
1991	240,436	240,234	185,533	169,142	14,986	1,405	54,689	9,022	1,490	44,139	38	12	202	
1992	254,939	254,734	196,676	179,372	15,810	1,494	58,049	9,431	1,521	47,060	37	9	206	
1993	267,804	267,590	206,359	188,440	16,356	1,563	61,225	9,897	1,547	49,746	36	6	214	
1994	279,118	278,898	214,891	196,400	16,854	1,637	64,003	10,293	1,551	52,124	34	4	220	
1995	291,682	291,464	224,378	205,315	17,348	1,715	67,083	10,717	1,573	54,761	32	3	218	
1996	302,914	302,697	232,937	213,423	17,715	1,799	69,759	11,217	1,486	57,025	31	1	218	
1997	316,311	316,095	243,590	223,554	18,154	1,882	72,505	11,660	1,466	59,349	30	1	216	
1998	326,817	326,599	252,659	232,324	18,395	1,940	73,940	11,936	1,435	60,540	29	(Z)	218	

(Z) Less than \$500,000.

SourceU.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Table 4.A5, p. 163.**Documentation**

For additional information about the Old-Age, Survivors, and Disability Insurance program, see the text for Table Bf377-394.

Amounts are benefits paid from the Old-Age, Survivors Insurance Trust Fund.

TABLE Bf408-421 Old-Age, Survivors, Disability, and Health Insurance – families receiving current-pay benefits, by selected family groups: 1940-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Retired-worker families receiving benefits for				Survivor families receiving benefits for				Disabled-worker families receiving benefits for					
	Worker only				Widowed mother or father and				Worker only					
	Both worker and wife		Nondisabled widow only		Two children		Three or more children		Total		Male		Female	
	Bf410	Bf411	Bf412	Bf413	Bf414	Bf415	Bf416	Bf417	Bf418	Bf419	Bf420	Bf421	Bf422	Bf423
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand
1940	78	65	12	4	10	6	3	—	—	—	—	—	—	—
1941	136	114	22	15	20	13	4	—	—	—	—	—	—	—
1942	176	146	30	29	29	17	7	—	—	—	—	—	—	—
1943	206	161	45	46	34	20	11	—	—	—	—	—	—	—
1944	315	253	62	69	67	36	20	—	—	—	—	—	—	—
1945	416	338	78	95	86	48	24	—	—	—	—	—	—	—
1946	473	381	92	127	66	37	22	—	—	—	—	—	—	—
1947	590	471	119	164	69	39	23	—	—	—	—	—	—	—
1948	708	560	148	210	73	41	24	—	—	—	—	—	—	—
1949	872	687	186	261	78	44	26	—	—	—	—	—	—	—
1950	1,240	939	301	314	82	53	33	—	—	—	—	—	—	—
1951	1,618	1,162	456	614	92	61	49	—	—	—	—	—	—	—
1952	1,894	1,306	588	454	103	68	56	—	—	—	—	—	—	—
1953	2,321	1,543	778	540	113	74	64	—	—	—	—	—	—	—
1954	2,744	1,780	964	637	116	82	72	—	—	—	—	—	—	—
1955	3,266	2,054	1,212	700	126	86	80	—	—	—	—	—	—	—
1956	3,662	2,133	1,528	912	128	88	83	—	—	—	—	—	—	—
1957	4,344	2,361	1,983	1,089	142	97	92	—	—	—	—	—	—	—
1958	4,872	2,587	2,285	1,224	156	105	99	—	—	—	—	—	—	—
1959	5,321	2,755	2,565	1,380	160	106	108	—	—	—	—	—	—	—
1960	5,742	2,922	2,820	1,527	172	113	114	—	—	—	—	—	—	—
1961	6,470	3,336	3,134	1,677	185	120	121	—	—	—	—	—	—	—
1962	7,134	3,666	3,468	1,835	191	128	131	—	—	—	—	—	—	—
1963	7,606	3,867	3,739	1,984	191	131	137	—	—	—	—	—	—	—
1964	7,982	3,998	3,984	2,129	191	134	142	—	—	—	—	—	—	—
1965	8,386	4,137	4,249	2,332	182	135	153	—	—	—	—	—	—	—
1966	8,897	4,301	4,596	2,541	180	140	164	—	—	—	—	—	—	—
1967	9,247	4,416	4,831	2,696	181	140	172	—	—	—	—	—	—	—
1968	9,641	4,558	5,082	2,836	181	144	177	—	—	—	—	—	—	—
1969	10,039	4,707	5,332	2,984	180	148	178	—	—	—	—	—	—	—
1970	10,533	4,904	5,629	3,080	183	155	182	—	—	—	—	—	—	—
1971	11,128	5,149	5,979	3,258	190	159	185	—	—	—	—	—	—	—
1972	11,653	5,364	6,288	3,325	188	166	184	—	—	—	—	—	—	—
1973	12,379	5,663	6,716	3,444	209	174	195	—	—	—	—	—	—	—
1974	12,948	5,862	7,086	3,536	218	176	178	—	—	—	—	—	—	—
1975	13,520	6,134	7,385	3,606	221	182	176	—	—	—	—	—	—	—
1976	14,056	6,351	7,705	3,706	219	186	171	—	—	—	—	—	—	—
1977	14,597	6,564	8,033	3,805	221	190	167	—	—	—	—	—	—	—
1978	15,148	6,791	8,357	3,894	228	186	158	—	—	—	—	—	—	—
1979	15,748	7,044	8,704	3,964	234	187	147	—	—	—	—	—	—	—

(continued)

Year	Retired-worker families receiving benefits for				Survivor families receiving benefits for				Disabled-worker families receiving benefits for				
	Worker only				Widowed mother or father and				Worker only				
	Total	Male	Female	Both worker and wife	Nondisabled widow only	One child	Two children	Three or more children	Total	Male	Female	Worker, wife, and two or more children	Worker, wife, and one child
Bf408	Bf409	Bf410	Bf411	Bf412	Bf413	Bf414	Bf415	Bf416	Bf417	Bf418	Bf419	Bf420	Bf421
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand
1980	16,314	7,286	9,028	2,736	4,033	239	184	2,061	1,257	804	154	228	80
1982	17,519	7,852	9,667	2,784	4,191	236	165	1,969	1,208	760	124	163	78
1983	18,162	8,166	9,996	2,830	4,271	161	141	1,961	1,215	746	85	143	80
1984	18,613	8,362	10,251	2,839	4,520	159	135	1,993	1,241	752	83	140	76
1985	19,132	8,601	10,531	2,861	4,606	158	131	2,039	1,267	772	84	140	76
1986	19,664	8,849	10,816	2,883	4,666	151	123	2,096	1,301	795	82	136	74
1987	20,137	9,064	11,074	2,893	4,709	141	115	2,154	1,338	816	79	132	74
1988	20,567	9,264	11,302	2,896	4,749	137	112	2,194	1,353	841	77	125	71
1989	21,036	9,495	11,541	2,903	4,788	137	109	2,262	1,390	872	75	120	67
1990	21,537	9,752	11,786	2,914	4,825	133	106	2,370	1,448	922	75	118	63
1991	21,978	9,985	11,992	2,918	4,850	130	106	2,523	1,529	994	76	119	61
1992	22,434	10,218	12,216	2,928	4,871	129	103	2,738	1,643	1,094	78	125	61
1993	22,796	10,404	12,392	2,912	4,870	126	103	2,935	1,743	1,192	78	127	59
1994	23,124	10,573	12,552	2,885	4,862	123	100	3,121	1,830	1,292	76	128	57
1995	23,433	10,732	12,701	2,845	4,841	120	97	3,305	1,909	1,396	75	124	55
1996	23,705	10,874	12,831	2,799	4,815	117	78	3,473	1,973	1,500	61	104	53
1997	24,124	11,027	13,097	2,759	4,657	113	74	3,593	2,006	1,588	57	91	53
1998	24,409	11,163	13,246	2,703	4,589	111	69	3,769	2,074	1,695	52	80	53

Sources
 U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1973), Table 29, p. 59; (1983), Table 98, p. 172; (1988), Table 5.H1, p. 218; (1999), Table 5.H1, p. 233.

Documentation
 For additional information about the Old-Age, Survivors, and Disability Insurance (OASDI) program, see the text for Table Bf377-394.

This table reports the number of families receiving current-pay benefits under OASDI. Beneficiary families are decomposed into retired-worker families, survivors of insured persons, and disabled-worker families. Data for 1981 are not available.

Series Bf411 and Bf419-420. A wife's entitlement is based on her age for series Bf411. In the disabled-worker categories, a wife's entitlement is based on care of children.

TABLE Bf422-431 Old-Age, Survivors, and Disability Insurance – benefits in current-payment status for male retired-worker beneficiaries, by age: 1940-1998¹

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Beneficiaries				Average age of beneficiaries	Retired worker current-pay beneficiaries – distribution by age				
	Total	With full benefits	With reduction in benefits for early retirement			62-64	65-69	70-74	75-79	80 and older
			Number	Percent						
	Bf422	Bf423	Bf424	Bf425		Bf426	Bf427	Bf428	Bf429	Bf430
Number	Number	Number	Percent	Years	Percent	Percent	Percent	Percent	Percent	
1940	99,000	99,000	—	—	68.8	—	74.4	17.4	6.4	1.8
1941	175,000	175,000	—	—	69.8	—	65.6	23.0	8.9	2.6
1942	224,000	224,000	—	—	70.5	—	57.3	28.6	10.9	3.3
1943	261,000	261,000	—	—	71.1	—	49.2	34.1	12.7	4.0
1944	323,000	323,000	—	—	71.5	—	42.7	38.6	14.2	4.6
1945	447,000	447,000	—	—	71.7	—	39.9	40.2	15.1	4.7
1946	610,000	610,000	—	—	71.9	—	38.0	41.1	15.7	5.2
1947	756,000	756,000	—	—	72.1	—	36.5	40.4	17.4	5.8
1948	900,000	900,000	—	—	72.3	—	35.6	39.1	18.9	6.4
1949	1,100,000	1,100,000	—	—	72.3	—	36.3	37.0	19.8	6.8
1950	1,469,000	1,469,000	—	—	72.2	—	39.1	33.7	20.2	7.1
1951	1,819,000	1,819,000	—	—	72.3	—	38.8	32.4	21.2	7.6
1952	2,052,000	2,052,000	—	—	72.6	—	36.9	32.9	21.7	8.5
1953	2,438,000	2,438,000	—	—	72.6	—	37.3	32.5	21.3	8.9
1954	2,803,000	2,803,000	—	—	72.6	—	37.2	32.8	20.6	9.4
1955	3,252,000	3,252,000	—	—	72.7	—	35.7	34.8	20.0	9.5
1956	3,572,271	3,572,271	—	—	72.9	—	34.2	35.2	20.3	10.3
1957	4,198,000	4,198,000	—	—	72.9	—	34.9	34.2	20.4	10.5
1958	4,617,000	4,617,000	—	—	73.0	—	33.9	34.3	20.6	11.2
1959	4,937,000	4,937,000	—	—	73.1	—	34.0	33.7	20.9	11.5
1960	5,216,668	5,216,668	—	—	73.2	—	33.8	33.1	21.1	12.1
1961	5,764,685	5,491,000	273,000	4.7	72.8	4.1	32.7	31.0	20.2	11.9
1962	6,244,000	5,587,000	657,000	10.5	72.7	6.5	31.4	30.4	19.4	12.3
1963	6,497,000	5,552,000	945,000	14.5	72.7	7.0	30.9	29.8	19.7	12.6
1964	6,657,000	5,460,000	1,197,000	18.0	72.8	7.2	30.0	29.7	19.8	13.3
1965	6,825,078	5,389,166	1,435,912	21.0	72.9	6.9	29.7	29.5	19.9	14.0
1966	7,034,000	5,345,000	1,689,000	24.0	73.1	6.9	29.5	29.2	19.8	14.5
1967	7,160,000	5,215,000	1,946,000	27.2	73.1	6.8	29.5	28.5	20.2	14.9
1968	7,309,000	5,108,000	2,202,000	30.1	73.1	7.0	29.5	28.0	20.0	15.5
1969	7,459,000	5,002,000	2,457,000	32.9	73.2	7.1	29.9	27.3	20.0	15.8
1970	7,688,460	4,930,400	2,758,060	35.9	72.6	7.5	30.1	26.9	19.6	15.9
1971	7,951,809	4,878,482	3,073,327	38.6	72.5	8.0	30.7	26.1	19.3	15.9
1972	8,230,847	4,833,280	3,397,567	41.3	72.4	8.4	31.2	26.0	18.5	15.9
1973	8,610,361	4,817,041	3,793,320	44.0	72.3	8.7	31.9	25.7	17.9	15.8
1974	8,832,270	4,737,114	4,095,156	46.4	72.3	8.9	32.2	25.9	17.3	15.7
1975	9,163,776	4,711,571	4,452,077	48.6	72.3	9.3	32.2	25.6	17.1	15.8
1976	9,420,659	4,633,096	4,787,563	50.8	72.3	9.4	32.3	25.8	16.7	15.8
1977	9,723,815	4,591,745	5,132,070	52.8	72.2	9.6	32.4	25.7	16.7	15.6
1978	9,928,463	4,535,918	5,392,545	54.3	72.2	9.2	32.4	25.9	16.8	15.6
1979	10,192,475	4,606,965	5,585,510	54.8	72.2	9.2	32.3	25.9	16.9	15.7
1980	10,460,735	4,586,539	5,874,196	54.8	72.2	9.5	32.1	25.8	16.9	15.6
1981	10,767,000	4,586,149	6,180,832	57.4	72.2	9.9	31.8	25.7	17.1	15.5
1982	11,030,000	4,647,057	6,382,785	57.9	72.2	10.3	31.3	25.6	17.1	15.6
1983	11,358,000	4,751,287	6,607,070	58.2	72.2	10.6	31.0	25.8	17.0	15.5
1984	11,573,000	4,702,805	6,870,106	59.4	72.2	10.8	30.3	25.9	17.3	15.7
1985	11,816,956	4,655,477	7,161,479	60.6	72.3	10.9	30.2	25.9	17.3	15.7
1986	12,080,376	4,621,111	7,459,265	61.7	72.4	10.9	30.3	25.7	17.3	15.8
1987	12,295,034	4,587,974	7,707,060	62.7	72.4	10.9	30.2	25.5	17.4	16.0
1988	12,486,962	4,563,777	7,923,185	63.5	72.4	10.7	30.0	25.5	17.6	16.2
1989	12,718,425	4,566,059	8,152,366	64.1	72.5	10.5	30.1	25.1	17.8	16.4
1990	12,853,832	4,592,911	8,390,921	64.6	72.5	10.3	30.0	25.3	17.8	16.6
1991	13,222,776	4,621,584	8,601,192	65.0	72.6	10.2	29.5	25.7	17.9	16.7
1992	13,470,502	4,649,446	8,821,056	65.5	72.7	10.0	29.2	25.8	17.8	17.1
1993	13,645,386	4,645,649	8,999,737	66.0	72.8	9.9	28.9	25.9	17.9	17.5
1994	13,790,997	4,639,089	9,151,908	66.4	72.8	9.8	28.3	26.2	17.9	17.8

Note appears at end of table

(continued)

TABLE Bf422-431 Old-Age, Survivors, and Disability Insurance – benefits in current-payment status for male retired-worker beneficiaries, by age: 1940-1998 *Continued*

Year	Beneficiaries					Retired worker current-pay beneficiaries – distribution by age				
	Total	With full benefits	With reduction in benefits for early retirement		Average age of beneficiaries	62-64	65-69	70-74	75-79	80 and older
			Number	Percent						
Bf422	Bf423	Bf424	Bf425	Bf426	Bf427	Bf428	Bf429	Bf430	Bf431	
Number	Number	Number	Percent	Years	Percent	Percent	Percent	Percent	Percent	
1995	13,913,531	4,559,535	9,353,996	67.2	72.9	9.5	28.0	26.1	18.3	18.1
1996	14,010,875	4,478,565	9,532,310	68.0	73.1	9.2	27.6	25.8	18.9	18.5
1997	14,116,818	4,371,503	9,745,315	69.0	73.2	9.0	27.2	25.8	19.2	18.8
1998	14,200,826	4,371,895	9,828,931	69.2	73.3	9.0	26.6	25.6	19.5	19.2

¹ Data reported in 1988 and 1990-1996 for series Bf426-431 are based on a 10 percent sample.

Sources

U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement* (1981), Table 81, p. 149; (1988), Table 5.B5, p. 184, Table 5.B8, p. 184; (1997), Table 5.B5, p. 211, Table 5.B8, p. 211; (1999), Table 5.B5, p. 206, Table 5B.8, p. 209.

Documentation

For additional information about the Old-Age, Survivors, and Disability Insurance (OASDI) program, see the text for Table Bf377-394.

This table provides information on the number of male retired workers who receive benefits under the OASDI program. Men became eligible to draw reduced OASDI benefits at age 62 in 1961. The OASDI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied.

TABLE Bf432-441 Old-Age, Survivors, and Disability Insurance – benefits in current-payment status for female retired-worker beneficiaries, by age: 1940-1998¹

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Beneficiaries					Retired worker current-pay beneficiaries – distribution by age				
	Total	With full benefits	With reduction in benefits for early retirement		Average age of beneficiaries	62-64	65-69	70-74	75-79	80 and older
			Number	Percent						
Bf432	Bf433	Bf434	Bf435	Bf436	Bf437	Bf438	Bf439	Bf440	Bf441	
Number	Number	Number	Percent	Years	Percent	Percent	Percent	Percent	Percent	
1940	13,000	13,000	—	—	68.1	—	82.6	12.8	3.9	0.6
1941	25,000	25,000	—	—	68.9	—	75.2	18.2	5.4	1.2
1942	36,000	36,000	—	—	69.5	—	68.4	23.5	6.5	1.6
1943	45,000	45,000	—	—	70.0	—	60.4	29.8	7.8	1.9
1944	55,000	55,000	—	—	70.5	—	52.6	36.1	9.1	2.3
1945	71,000	71,000	—	—	70.8	—	47.1	40.0	10.2	2.6
1946	92,000	92,000	—	—	71.1	—	43.3	42.5	11.2	3.0
1947	119,000	119,000	—	—	71.4	—	41.2	42.6	13.0	3.3
1948	148,000	148,000	—	—	71.6	—	39.9	41.3	15.0	3.7
1949	186,000	186,000	—	—	71.7	—	39.8	39.0	17.0	4.2
1950	302,000	302,000	—	—	71.1	—	48.4	32.9	15.0	3.7
1951	459,000	459,000	—	—	70.8	—	51.5	30.6	14.2	3.7
1952	592,000	592,000	—	—	71.0	—	50.2	30.9	14.7	4.1
1953	784,000	784,000	—	—	71.1	—	49.8	30.9	14.8	4.6
1954	972,000	972,000	—	—	71.2	—	49.0	31.2	14.8	5.0
1955	1,222,000	1,222,000	—	—	71.3	—	47.8	32.3	14.6	5.2
1956	1,540,159	1,425,130	115,029	7.5	70.9	7.3	42.5	30.7	14.0	5.5
1957	1,999,000	1,613,000	386,000	19.3	70.5	13.3	39.7	28.2	13.4	5.5
1958	2,303,000	1,735,000	569,000	24.7	70.7	13.0	38.3	28.7	13.9	6.1
1959	2,589,000	1,825,000	764,000	29.5	70.8	12.9	37.5	28.8	14.4	6.6
1960	2,844,801	1,895,597	949,204	33.4	71.0	12.6	36.3	29.0	15.0	7.2
1961	3,160,000	1,977,000	1,183,000	37.4	71.1	13.0	35.4	28.5	15.4	7.6
1962	3,494,000	2,060,000	1,434,000	41.0	71.2	13.3	34.3	28.5	15.7	8.2
1963	3,766,000	2,111,000	1,655,000	44.0	71.4	13.0	33.5	28.3	16.4	8.8
1964	4,011,000	2,138,000	1,873,000	46.7	71.6	12.9	32.3	28.1	17.1	9.5

Note appears at end of table

(continued)

TABLE Bf432-441 Old-Age, Survivors, and Disability Insurance – benefits in current-payment status for female retired-worker beneficiaries, by age: 1940-1998 *Continued*

Year	Beneficiaries				Average age of beneficiaries	Retired worker current-pay beneficiaries – distribution by age				
	Total	With full benefits	With reduction in benefits for early retirement			62-64	65-69	70-74	75-79	80 and older
			Number	Percent						
	Bf432	Bf433	Bf434	Bf435		Bf436	Bf437	Bf438	Bf439	Bf440
Number	Number	Number	Percent	Years	Percent	Percent	Percent	Percent	Percent	
1965	4,275,506	2,192,220	2,083,286	48.7	71.8	12.2	31.6	28.1	17.6	10.5
1966	4,624,000	2,307,000	2,317,000	50.1	72.1	11.8	31.0	27.7	18.1	11.4
1967	4,859,000	2,338,000	2,521,000	51.9	72.2	11.4	30.7	27.1	18.7	12.1
1968	5,111,000	2,345,000	2,766,000	54.1	72.3	11.3	30.4	26.5	18.8	13.1
1969	5,363,000	2,321,000	3,042,000	56.7	72.4	11.4	30.3	25.8	18.8	13.8
1970	5,660,715	2,351,895	3,308,820	58.5	72.0	11.5	30.1	25.4	18.7	14.4
1971	5,975,130	2,371,290	3,603,840	60.3	72.1	11.7	30.2	24.7	18.4	15.1
1972	6,324,628	2,402,222	3,922,406	62.0	72.0	11.9	30.3	24.5	17.9	15.5
1973	6,754,201	2,526,938	4,227,263	62.6	72.0	11.9	30.7	24.2	17.3	15.8
1974	7,126,251	2,525,675	4,600,576	64.6	72.1	11.8	30.6	24.2	17.0	16.4
1975	7,424,353	2,527,259	4,897,094	66.0	72.2	11.8	30.4	24.2	16.9	16.7
1976	7,744,756	2,670,201	5,074,555	65.5	72.3	11.6	30.2	24.4	16.7	17.1
1977	8,108,669	2,672,843	5,435,826	67.0	72.3	11.7	30.0	24.3	16.7	17.3
1978	8,429,522	2,684,147	5,745,375	68.2	72.5	11.3	29.7	24.4	16.8	17.8
1979	8,777,697	2,772,090	6,005,607	68.4	72.5	11.2	29.5	24.3	17.0	17.9
1980	9,101,350	2,810,659	6,290,691	69.1	72.6	11.2	29.2	24.2	17.1	18.3
1981	9,428,000	2,838,899	6,589,482	69.9	72.7	11.1	28.9	24.0	17.4	18.6
1982	9,733,000	2,899,564	6,833,824	70.2	72.8	11.2	28.3	24.0	17.5	19.0
1983	10,060,000	2,989,500	7,070,890	70.3	72.9	11.1	28.0	23.9	17.6	19.4
1984	10,334,000	3,034,277	7,299,273	70.6	73.1	11.1	27.2	24.0	17.8	19.9
1985	10,614,974	3,065,482	7,549,492	71.1	73.3	11.0	26.9	23.9	17.9	20.2
1986	10,900,572	3,089,833	7,811,739	71.7	73.3	10.8	26.7	23.8	18.0	20.7
1987	11,144,650	3,102,818	8,041,832	72.2	73.4	10.7	26.4	23.6	18.1	21.2
1988	11,371,264	3,136,139	8,235,125	72.4	73.5	10.5	26.0	23.6	18.2	21.7
1989	11,608,179	3,185,150	8,423,029	72.6	73.6	10.2	26.1	23.1	18.4	22.2
1990	11,854,268	3,247,328	8,606,940	72.6	73.7	9.9	25.9	23.0	18.5	22.7
1991	12,065,943	3,306,543	8,759,400	72.6	73.9	9.5	25.4	23.2	18.6	23.2
1992	12,287,225	3,370,997	8,916,228	72.6	74.0	9.3	25.2	23.1	18.5	23.8
1993	12,458,919	3,423,336	9,035,583	72.5	74.1	9.0	24.9	23.0	18.6	24.4
1994	12,616,759	3,470,886	9,145,873	72.5	74.2	9.0	24.3	23.2	18.4	25.0
1995	12,759,275	3,381,828	9,377,447	73.5	74.3	8.8	24.0	23.2	18.5	25.4
1996	12,887,197	3,305,513	9,581,684	74.4	74.4	8.7	23.6	22.9	18.8	25.9
1997	13,157,754	3,301,783	9,855,971	74.9	74.5	8.6	23.2	23.0	19.0	26.3
1998	13,309,709	3,327,769	9,981,940	75.0	74.6	8.7	22.8	22.8	19.0	26.7

¹ Data in 1988, 1990-1996 for series Bf436-441 are based on a 10 percent sample.

Sources

Social Security Bulletin, Annual Statistical Supplement (1981), Table 81, p. 149; (1988), Table 5.B5, p. 184, Table 5B.8, p. 184; (1999) Table 5.B5, p. 206, Table 5B.8, p. 209.

Documentation

For additional information about the Old-Age, Survivors, and Disability Insurance (OASDI) program, see the text for Table Bf377-394.

The OASDI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied.

This table provides information on the number of female retired workers who receive benefits under the OASDI program. Women became eligible to receive reduced benefits from the OASI program at age 62 in 1956.

TABLE Bf442-460 Old-Age, Survivors Insurance trust fund – receipts, expenditures, and assets: 1937-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Old-Age and Survivors Insurance Trust Fund								
	Receipts					Expenditures			
	Total	Net contributions	Taxation of benefits	Payments from the general fund of the Treasury		Total	Benefit payments	Administrative expenses	Transfers to Railroad Retirement program
				Net interest					
Bf442	Bf443	Bf444	Bf445	Bf446	Bf447	Bf448	Bf449	Bf450	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1937	767	765	—	—	2	1	1	—	—
1938	375	360	—	—	15	10	10	—	—
1939	607	580	—	—	27	14	14	—	—
1940	368	325	—	—	43	61	35	26	—
1941	845	789	—	—	56	114	88	26	—
1942	1,085	1,012	—	—	72	159	131	28	—
1943	1,328	1,239	—	—	88	195	166	29	—
1944	1,422	1,316	—	—	107	238	209	29	—
1945	1,420	1,285	—	—	134	304	274	30	—
1946	1,447	1,295	—	—	152	418	378	40	—
1947	1,722	1,557	—	1	164	512	466	46	—
1948	1,969	1,685	—	3	281	607	556	51	—
1949	1,816	1,666	—	4	146	721	667	54	—
1950	2,928	2,667	—	4	257	1,022	961	61	—
1951	3,784	3,363	—	4	417	1,966	1,885	81	—
1952	4,184	3,819	—	—	365	2,282	2,194	88	—
1953	4,359	3,945	—	—	414	3,094	3,006	88	—
1954	5,610	5,163	—	—	447	3,741	3,670	92	-21
1955	6,167	5,713	—	—	454	5,079	4,968	119	-7
1956	6,697	6,172	—	—	526	5,841	5,715	132	-5
1957	7,381	6,825	—	—	556	7,507	7,347	162	-2
1958	8,117	7,566	—	—	552	8,646	8,327	194	124
1959	8,584	8,052	—	—	532	10,308	9,842	184	282
1960	11,382	10,866	—	—	516	11,198	10,677	203	318
1961	11,833	11,285	—	—	548	12,432	11,862	239	332
1962	12,585	12,059	—	—	526	13,973	13,356	256	361
1963	15,063	14,541	—	—	521	14,920	14,217	281	423
1964	16,258	15,689	—	—	569	15,613	14,914	296	403
1965	16,610	16,017	—	—	593	17,501	16,737	328	436
1966	21,302	20,580	—	78	644	18,967	18,267	256	444
1967	24,034	23,138	—	78	818	20,382	19,468	406	508
1968	25,040	23,719	—	382	939	23,557	22,643	476	438
1969	29,554	27,947	—	442	1,165	25,176	24,210	474	491
1970	32,220	30,256	—	449	1,515	29,848	28,798	471	579
1971	35,877	33,723	—	488	1,667	34,542	33,414	514	613
1972	40,050	37,781	—	475	1,794	38,522	37,124	674	724
1973	48,344	45,975	—	442	1,928	47,175	45,745	647	783
1974	54,688	52,081	—	447	2,159	53,397	51,623	865	909
1975	59,605	56,816	—	425	2,364	60,395	58,517	896	982
1976	66,276	63,362	—	614	2,301	67,876	65,705	959	1,212
1977	72,412	69,572	—	613	2,227	75,309	73,121	981	1,208
1978	78,094	75,471	—	615	2,008	83,064	80,361	1,115	1,589
1979	90,274	87,919	—	557	1,797	93,133	90,573	1,113	1,448
1980	105,841	103,456	—	540	1,845	107,678	105,083	1,154	1,442
1981	125,362	122,627	—	675	2,060	126,695	123,803	1,307	1,585
1982	125,198	123,673	—	680	845	142,119	138,806	1,519	1,793
1983	150,584	138,337	—	5,541	6,706	153,999	149,221	1,528	2,251
1984	169,328	164,122	2,835	105	2,266	161,883	157,841	1,638	2,404

(continued)

TABLE Bf442-460 Old-Age, Survivors Insurance trust fund – receipts, expenditures, and assets: 1937-1998
Continued

Old-Age and Survivors Insurance Trust Fund									
Year	Receipts					Expenditures			
	Total	Net contributions	Taxation of benefits	Payments from the general fund of the Treasury		Total	Benefit payments	Administrative expenses	Transfers to Railroad Retirement program
				Net interest					
	Bf442	Bf443	Bf444	Bf445	Bf446	Bf447	Bf448	Bf449	Bf450
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1985	184,239	176,958	3,208	2,203	1,871	171,150	167,248	1,592	2,310
1986	197,394	190,741	3,424	160	3,069	181,000	176,813	1,601	2,585
1987	210,737	202,735	3,257	55	4,690	187,668	183,587	1,524	2,557
1988	240,770	229,775	3,384	43	7,568	200,020	195,454	1,776	2,790
1989	264,653	250,195	2,439	34	11,985	212,489	207,971	1,673	2,845
1990	286,652	267,530	4,848	-2,089	16,363	227,519	222,987	1,563	2,969
1991	299,286	272,574	5,864	19	20,829	245,634	240,467	1,792	3,375
1992	311,161	280,992	5,852	14	24,303	259,861	254,883	1,830	3,148
1993	323,277	290,905	5,335	10	27,027	273,104	267,755	1,996	3,353
1994	328,271	293,323	4,995	7	29,946	284,133	279,068	1,645	3,420
1995	342,801	304,620	5,490	-129	32,820	297,760	291,630	2,077	4,052
1996	363,741	321,557	6,471	7	35,706	308,217	302,861	1,802	3,554
1997	397,169	349,946	7,426	2	39,795	322,073	316,257	2,128	3,688
1998	424,848	371,207	9,149	1	44,491	332,324	326,762	1,899	3,662

(continued)

Old-Age and Survivors Insurance Trust Fund			
Year	Assets invested in U.S.		
	Total assets (year end)	government securities	Cash balances
	Bf451	Bf452	Bf453
Million dollars	Million dollars	Million dollars	
1937	766	513	253
1938	1,132	862	269
1939	1,724	1,435	289
1940	2,031	2,017	14
1941	2,762	2,736	26
1942	3,688	3,655	33
1943	4,820	4,779	42
1944	6,005	5,967	38
1945	7,121	7,054	66
1946	8,150	8,079	71
1947	9,360	9,268	92
1948	10,722	10,556	166
1949	11,816	11,728	88
1950	13,721	13,331	391
1951	15,540	15,017	522
1952	17,442	16,960	481
1953	18,707	18,291	416
1954	20,576	19,863	713
1955	21,663	21,102	561
1956	22,519	21,831	689
1957	22,393	21,566	827
1958	21,864	20,953	911
1959	20,141	19,151	990
1960	20,324	19,128	1,196
1961	19,725	18,404	1,321
1962	18,337	17,060	1,277
1963	18,480	17,154	1,327
1964	19,125	17,758	1,367

Disability Insurance trust fund							
Year	Receipts			Expenditures			Assets (year end)
	Total	Net contributions	Other sources	Total	Benefit payments	Other expenditures	
	Bf454	Bf455	Bf456	Bf457	Bf458	Bf459	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1937	—	—	—	—	—	—	—
1938	—	—	—	—	—	—	—
1939	—	—	—	—	—	—	—
1940	—	—	—	—	—	—	—
1941	—	—	—	—	—	—	—
1942	—	—	—	—	—	—	—
1943	—	—	—	—	—	—	—
1944	—	—	—	—	—	—	—
1945	—	—	—	—	—	—	—
1946	—	—	—	—	—	—	—
1947	—	—	—	—	—	—	—
1948	—	—	—	—	—	—	—
1949	—	—	—	—	—	—	—
1950	—	—	—	—	—	—	—
1951	—	—	—	—	—	—	—
1952	—	—	—	—	—	—	—
1953	—	—	—	—	—	—	—
1954	—	—	—	—	—	—	—
1955	—	—	—	—	—	—	—
1956	—	—	—	—	—	—	—
1957	709	702	7	59	57	2	649
1958	991	966	25	261	249	12	1,379
1959	931	891	40	485	457	28	1,825
1960	1,063	1,010	53	600	568	32	2,289
1961	1,104	1,038	66	956	887	69	2,437
1962	1,114	1,046	68	1,183	1,105	78	2,368
1963	1,165	1,099	66	1,297	1,210	87	2,235
1964	1,218	1,154	64	1,407	1,309	98	2,047

(continued)

TABLE Bf442-460 Old-Age, Survivors Insurance trust fund – receipts, expenditures, and assets: 1937-1998
Continued

Year	Old-Age and Survivors Insurance Trust Fund			Disability Insurance trust fund							
	Total assets (year end)	Assets invested in U.S.		Receipts			Expenditures				
		Bf451	Bf452	Cash balances	Total	Net contributions	Other sources	Total	Benefit payments	Other expenditures	Assets (year end)
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1965	18,235	16,643	1,592	1,247	1,188	59	1,687	1,573	114	1,606	
1966	20,570	18,789	1,781	2,079	2,006	73	1,947	1,784	163	1,739	
1967	24,222	22,513	1,708	2,379	2,286	93	2,089	1,950	139	2,029	
1968	25,704	23,258	2,446	3,454	3,316	138	2,458	2,311	147	3,025	
1969	30,082	27,886	2,197	3,792	3,599	193	2,716	2,557	159	4,100	
1970	32,454	29,935	2,519	4,774	4,481	293	3,259	3,085	174	5,614	
1971	33,789	—	—	5,031	4,620	411	4,000	3,783	217	6,645	
1972	35,318	—	—	5,572	5,107	465	4,759	4,502	257	7,457	
1973	36,487	—	—	6,443	5,932	511	5,973	5,764	209	7,927	
1974	37,777	—	—	7,378	6,826	552	7,196	6,957	239	8,109	
1975	36,987	—	—	8,035	7,444	591	8,790	8,505	285	7,354	
1976	35,388	—	—	8,757	8,233	524	10,366	10,055	311	5,745	
1977	32,491	—	—	9,570	9,138	432	11,945	11,547	398	3,370	
1978	27,520	—	—	13,810	13,413	397	12,954	12,599	355	4,226	
1979	24,660	—	—	15,590	15,114	476	14,186	13,786	400	5,630	
1980	22,823	—	—	13,871	13,255	616	15,872	15,515	357	3,629	
1981	21,490	—	—	17,078	16,738	340	17,658	17,192	466	3,049	
1982	22,088	—	—	22,715	21,995	720	17,992	17,376	616	2,691	
1983	19,672	—	—	20,682	17,991	2,691	18,177	17,524	653	5,195	
1984	27,117	—	—	17,309	15,945	1,364	18,546	17,898	648	3,959	
1985	35,842	—	—	19,301	17,191	2,110	19,478	18,827	651	6,321	
1986	39,081	—	—	19,439	18,399	1,040	20,522	19,853	669	7,780	
1987	62,149	—	—	20,303	19,691	612	21,425	20,519	906	6,658	
1988	102,899	—	—	22,699	22,039	660	22,494	21,695	799	6,864	
1989	155,063	—	—	24,795	23,993	802	23,753	22,911	842	7,905	
1990	214,197	—	—	28,791	28,539	252	25,616	24,829	787	11,079	
1991	267,849	—	—	30,390	29,137	1,253	28,571	27,695	876	12,898	
1992	319,150	—	—	31,430	30,136	1,294	32,004	31,112	892	12,324	
1993	369,322	—	—	32,301	31,185	1,116	35,662	34,613	1,049	8,963	
1994	413,460	—	—	52,841	51,373	1,468	38,879	37,744	1,135	22,925	
1995	458,502	—	—	56,696	54,401	2,295	42,055	40,923	1,132	37,566	
1996	514,028	—	—	60,710	57,325	3,385	45,351	44,189	1,162	52,924	
1997	589,121	—	—	60,499	56,037	4,462	47,034	45,695	1,339	66,389	
1998	681,645	—	—	64,357	58,966	5,390	49,931	48,207	1,724	80,815	

Source

U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Tables 4.A1 and 4.A2, pp. 159-160. For series Bf452-453, April issues of the *Social Security Bulletin*.

Documentation

See also the text for Table Bf377-394.

The Old-Age, Survivors, and Disability Insurance (OASDI) taxes collected from employees, employers, and the self-employed are credited to the Old-Age, Survivors Insurance (OASI) and Disability Insurance (DI) trust funds. Benefits are financed principally through these contributions on a pay-as-you-go basis. In addition, the trust funds receive income from the following: interest on investments of trust fund assets in securities issued or guaranteed by the U.S. government; federal general revenues to finance the cost of benefits attributable to military and other gratuitous wage credits; revenues resulting from the inclusion of Social Security benefits in adjusted gross income for federal income tax purposes; and special age-72 benefits (covered by transfers from the general fund of payments for costs of benefits to certain uninsured persons who attained age 72 before 1972). The OASI program is currently administered by the Social Security Administration (SSA). Prior to 1995, SSA was a component of the Department of Health and Human Services.

Series Bf442. The sum of series Bf443-446.

Series Bf447. The sum of series Bf448-450.

Series Bf443 and Bf455. Beginning in 1983, the net contributions to the OASI and DI trust funds include transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957 and later if such credits were considered to be covered wages.

Series Bf445 and Bf456. Includes payments for the following: in 1947-1951 (OASI) and in 1966 and later (both funds), costs of noncontributory wage credits for military service performed before 1957; in 1971-1982, costs of deemed wage credits for military service performed after 1956; and starting in 1968 (OASI only), costs of benefits to certain uninsured persons who attained age 72 before 1968.

Series Bf446 and Bf456. Includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged currently to the trust fund on an estimated basis with a final adjustment, including interest, made in the following fiscal year. Beginning in October 1973 for the OASI fund and in July 1974 for the DI fund, the figures shown in series Bf446 and Bf456 include relatively small amounts of gifts to the fund. Figures for the period 1983-1986 reflect payments from a borrowing trust fund to

(continued)

TABLE Bf442-460 Old-Age, Survivors Insurance trust fund – receipts, expenditures, and assets: 1937-1998
Continued

a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983-1990 the series reflect interest paid from the trust fund to the general fund on advance tax transfers. Finally, the amount shown for the OASI fund in series Bf446 for 1985 includes an interest adjustment of \$88 million on unnegotiated checks issued prior to April 1985. For the DI fund in series Bf456, the amount shown for 1985 includes an interest adjustment of \$14.8 million on unnegotiated checks issued before April 1985. In 1987, other receipts from the DI trust fund, series Bf456, include \$195 million in transfers from the DI trust fund to the general fund of the Treasury to correct estimated amounts transferred for calendar years 1984 and 1985.

Series Bf452-453. Unavailable after 1970.

Series Bf454. The sum of series Bf455-456.

Series Bf456. Other receipts in the DI trust fund include income from taxation of benefits, payments from the general fund of the Treasury, and net interest.

Series Bf457. The sum of series Bf458-459.

Series Bf458. Benefit payments from the DI trust fund include payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.

Series Bf459. Other expenditures of the DI trust fund include administrative expenses and transfers to the Railroad Retirement program.

TABLE BF461-475 Old-Age, Survivors and Disability Insurance – average monthly family benefit, by selected family groups: 1940-1999

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	OASDI average monthly family benefit															
	Retired-worker families, receiving benefits for				Survivors' families, receiving benefits for				Disabled-worker families, receiving benefits for				OASDI maximum benefits payable to men at time of retirement			
	Worker only		Worker and wife		Nondisabled widow only		Widowed mother or father and		Worker only		Spouse and one child		Spouse and two or more children		Bf474	Bf475
	Bf462	Bf463	Bf464	Bf465	Bf466	Bf467	Bf468	Bf469	Bf470	Bf471	Bf472	Bf473	Bf474	Bf475		
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
1940	22.1	22.8	18.4	20.3	33.9	47.1	51.3	—	—	—	—	—	—	—	—	41.2
1941	22.2	22.9	18.5	20.2	33.7	46.6	51.0	—	—	—	—	—	—	—	—	41.6
1942	22.5	23.3	18.7	20.2	33.9	46.5	50.7	—	—	—	—	—	—	—	—	42.0
1943	22.9	23.8	19.1	20.2	34.2	46.9	50.4	—	—	—	—	—	—	—	—	42.4
1944	23.0	24.1	19.3	20.2	34.4	47.3	50.1	—	—	—	—	—	—	—	—	42.8
1945	23.5	24.5	19.5	20.2	34.1	47.7	50.4	—	—	—	—	—	—	—	—	43.2
1946	23.9	24.9	19.6	20.2	34.6	48.2	51.4	—	—	—	—	—	—	—	—	43.6
1947	24.2	25.3	19.9	20.4	35.4	48.8	52.2	—	—	—	—	—	—	—	—	44.0
1948	24.6	25.8	20.1	20.6	36.0	49.8	53.0	—	—	—	—	—	—	—	—	44.4
1949	25.3	26.5	20.6	20.8	36.5	50.4	54.0	—	—	—	—	—	—	—	—	44.8
1950	42.2	44.6	34.8	36.5	76.9	93.9	92.4	—	—	—	—	—	—	—	—	45.2
1951	40.3	43.2	33.0	36.0	77.3	93.8	92.0	—	—	—	—	—	—	—	—	68.5
1952	47.1	50.7	39.1	40.7	87.5	106.0	101.3	—	—	—	—	—	—	—	—	68.5
1953	48.8	52.9	40.6	40.9	90.1	111.9	109.0	—	—	—	—	—	—	—	—	85.0
1954	56.5	61.6	47.0	46.3	103.9	130.5	126.8	—	—	—	—	—	—	—	—	85.0
1955	59.1	64.6	49.8	48.7	106.8	135.4	133.2	—	—	—	—	—	—	—	—	98.5
1956	59.9	66.1	51.1	50.1	109.9	141.0	138.7	—	—	—	—	—	—	—	—	103.5
1957	60.9	68.3	52.2	51.1	114.3	146.3	144.8	72.8	73.5	69.8	—	—	—	—	—	108.5
1958	62.6	70.7	53.5	51.9	117.0	151.7	150.7	81.7	84.7	70.6	170.1	165.5	—	—	—	108.5
1959	68.7	78.0	58.7	56.7	129.7	170.7	178.6	87.9	91.9	76.1	182.8	188.3	135.6	—	—	116.0
1960	69.9	79.9	59.6	57.7	131.7	188.0	181.7	87.9	91.9	76.9	184.7	192.2	135.5	—	—	119.0
1961	71.9	81.2	62.0	64.9	135.0	189.3	182.8	87.7	91.5	77.7	186.5	193.8	136.3	—	—	120.0
1962	72.5	81.8	62.6	65.9	137.3	190.7	186.8	88.0	92.1	78.1	185.8	194.7	136.9	—	—	121.0
1963	73.2	82.6	63.4	66.9	139.4	192.5	190.4	88.6	92.9	78.8	186.7	196.1	137.9	—	—	122.0
1964	73.9	83.6	64.3	67.9	141.6	193.4	192.1	89.2	93.8	79.3	187.7	197.1	138.1	—	—	123.0
1965	80.1	90.5	70.0	73.9	153.0	219.8	218.1	95.4	100.7	85.0	201.0	216.3	145.9	—	—	131.7
1966	80.6	91.2	70.7	74.3	154.3	221.9	218.8	95.8	101.2	85.2	202.0	217.8	146.0	—	—	132.7
1967	81.7	92.5	71.9	75.2	155.9	224.4	221.7	96.2	101.8	85.5	202.9	217.3	146.0	—	—	135.9
1968	95.0	107.1	84.2	86.8	179.0	257.1	253.4	109.2	115.6	97.2	229.7	242.0	167.4	—	—	156.0
1969	96.6	109.0	85.7	87.8	182.2	255.8	253.6	109.9	116.6	97.6	230.7	241.3	169.7	—	—	160.5
1970	114.2	128.7	101.6	102.4	213.0	291.1	289.9	128.1	136.3	113.1	264.1	273.2	199.2	—	—	189.8
1971	127.4	143.3	113.3	114.4	238.3	320.0	315.6	142.7	152.6	124.9	290.2	296.7	221.6	—	—	213.1
1972	157.1	177.0	140.2	138.3	290.0	383.1	376.1	175.0	188.2	151.8	356.3	362.8	274.2	—	—	216.1
1973	161.6	180.1	146.0	158.4	297.8	391.0	377.9	178.2	192.8	153.2	364.8	367.2	278.6	—	—	266.1
1974	183.1	204.2	164.6	178.8	335.0	438.4	421.9	200.0	217.8	170.6	409.9	411.3	314.0	—	—	274.6

(continued)

TABLE Bf461-475 Old-Age, Survivors and Disability Insurance - average monthly family benefit, by selected family groups: 1940-1999 *Continued*

Year	OASDI average monthly family benefit																												
	Retired-worker families, receiving benefits for			Survivors' families, receiving benefits for			Disabled-worker families, receiving benefits for			OASDI maximum																			
	Worker only			Widowed mother or father and			Worker only			payable to men at time of retirement																			
	Male worker only		Female worker only		Worker and wife		Nondisabled widow only		One child		Two children		Three or more children		Total		Male worker		Female worker		Spouse and one child		Spouse and two or more children		Spouse				
	Bf462	Bf463	Bf464	Bf465	Bf466	Bf467	Bf468	Bf469	Bf470	Bf471	Bf472	Bf473	Bf474	Bf475	Bf462	Bf463	Bf464	Bf465	Bf466	Bf467	Bf468	Bf469	Bf470	Bf471	Bf472	Bf473	Bf474	Bf475	
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
1975	201.6	225.5	181.8	195.9	367.2	468.6	461.8	218.9	240.0	185.0	441.0	454.0	344.0	316.3															
1976	218.8	245.1	197.1	211.0	399.8	503.4	499.7	237.4	261.4	199.4	482.2	495.7	377.0	364.0															
1977	236.8	265.9	213.1	226.5	436.8	546.6	538.6	265.5	283.8	213.8	525.8	538.1	407.5	412.7															
1978	256.6	288.9	230.3	243.6	474.0	591.9	582.8	277.9	308.5	230.2	568.0	585.9	443.0	459.8															
1979	287.0	324.0	257.1	270.3	532.9	655.0	646.7	308.9	343.6	254.8	632.7	655.7	497.1	503.4															
1980	333.0	377.1	297.4	311.6	612.8	759.2	740.5	355.4	396.2	291.7	727.0	746.1	573.0	572.0															
1981	—	—	—	—	—	—	—	—	—	—	—	—	—	677.0															
1982	408.9	465.5	362.9	379.0	735.6	885.5	867.9	424.2	474.2	344.7	847.4	858.2	690.7	679.3															
1983	429.7	490.0	380.4	400.6	774.8	923.0	884.5	439.4	490.9	355.4	867.9	881.8	716.2	709.5															
1984	448.2	511.6	396.4	416.3	805.3	948.3	906.6	454.0	507.6	365.7	881.5	885.5	740.4	703.6															
1985	465.8	531.8	412.0	434.3	829.6	981.5	924.9	466.9	523.1	374.6	898.1	895.2	765.0	717.2															
1986	475.2	542.6	420.1	444.9	841.7	994.0	939.8	470.7	527.8	377.4	896.9	888.3	773.3	760.1															
1987	499.2	570.4	440.8	468.7	882.1	1,032.3	968.9	491.6	552.0	392.6	929.4	918.3	815.5	789.2															
1988	522.7	597.2	461.7	493.6	921.8	1,070.4	1,012.9	512.2	576.1	409.5	960.2	938.4	855.4	838.6															
1989	552.1	630.7	487.4	522.8	967.8	1,120.0	1,064.6	539.3	607.1	431.2	1,009.4	971.9	903.7	899.6															
1990	588.3	671.9	519.1	557.9	1,020.2	1,177.7	1,124.6	570.4	642.8	456.8	1,062.1	1,016.0	960.8	975.0															
1991	614.7	702.0	542.1	584.9	1,059.8	1,216.8	1,160.6	592.3	668.4	475.5	1,098.0	1,043.3	1,004.7	1,022.9															
1992	637.8	728.1	562.3	609.0	1,086.9	1,252.4	1,190.8	609.5	688.7	490.7	1,122.1	1,057.4	1,045.0	1,088.7															
1993	659.1	751.9	581.2	632.2	1,114.2	1,282.6	1,229.4	625.5	707.2	506.0	1,143.0	1,074.2	1,078.2	1,128.8															
1994	682.3	777.8	601.8	657.1	1,150.1	1,328.4	1,271.0	646.2	731.8	525.0	1,177.6	1,100.0	1,118.6	1,147.5															
1995	704.8	803.0	621.8	681.6	1,184.5	1,365.5	1,299.8	667.6	757.4	544.8	1,205.5	1,130.9	1,159.9	1,199.1															
1996	730.0	831.1	644.2	708.7	1,222.5	1,450.6	1,347.2	690.6	785.3	566.0	1,245.9	1,148.5	1,200.6	1,248.9															
1997	750.2	853.7	663.1	733.2	1,250.3	1,502.6	1,358.0	708.0	806.6	583.6	1,280.2	1,165.9	1,238.5	1,326.6															
1998	765.1	870.5	676.4	750.9	1,277.0	1,537.7	1,393.2	720.0	820.2	597.4	1,300.4	1,189.4	1,261.9	1,342.8															
1999	—	—	—	—	—	—	—	—	—	—	—	—	—	1,373.1															

Source Social Security Bulletin: Annual Statistical Supplement (1973), Table 29, p. 59. Social Security Bulletin: Annual Statistical Supplement (1983), Table 98, pp. 172-3. Social Security Bulletin: Annual Statistical Supplement (1988), Table 5.H1, p. 218. Social Security Bulletin: Annual Statistical Supplement (1999), Table 5.H1, p. 233, Table 2.A28, p. 73.

Documentation This table reports the average monthly benefit paid to families receiving current-pay benefits under Old-Age, Survivors, and Disability Insurance (OASDI). Beneficiary families are decomposed into retired-worker families, survivors of insured persons, and disabled-worker families. For more information on OASDI, see the text for Table Bf377-394.

The OASDI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied. Data for 1981 are not available, except for series Bf475.

For fully insured workers who retire at the normal retirement age (currently age 65), benefits payable are equal to 100 percent of the primary insurance amount (PIA). The normal retirement age is scheduled to rise from age 65 to 67, with the first increase affecting workers who reach age 62 in the year 2000.

Workers who retire before the normal retirement age can receive benefits at a permanently reduced rate beginning at age 62. The amount of the reduction depends upon the number of benefit payments received before the normal retirement age. The annual rate of reduction is $6\frac{2}{3}$ percent for each of the first three years and, eventually, 5 percent for each of the next two years the worker receives benefits before the normal retirement age. Disabled workers may receive reduced benefits if they previously received a reduced retirement benefit. Workers who postpone their retirement beyond the normal retirement age have their benefits increased through the delayed retirement credit for each month benefits are foregone as a result of earnings above the exempt amount.

(continued)

TABLE Bf461-475 Old-Age, Survivors and Disability Insurance – average monthly family benefit, by selected family groups: 1940-1999 *Continued*

Spouses of retired or disabled workers are eligible for monthly benefits at age 62. Their benefits are equal to 50 percent of the worker's PIA for the first entitlement at the normal retirement age but are permanently reduced if payments begin earlier. The annual rate of reduction is 8 1/3 percent for the first three years and, eventually, 5 percent for the next two years. Children of retired or disabled workers are also eligible to receive monthly benefits equal to 50 percent of the worker's PIA, as are spouses younger than age 65 who are caring for at least one child younger than age 16 or disabled child age 18 or older of the worker.

Widows and widowers of fully insured workers are first eligible for monthly benefits at age 60, or at age 50 if they are disabled. The benefit amount payable to widows and widowers first entitled to benefits at age 60 or before is equal to 71.5 percent of the worker's PIA, plus any delayed retirement credit the deceased worker would be receiving. For those widows and widowers first entitled to benefits at age 62 or later, the benefit is limited (if the worker had received benefits before normal retirement age) to the greater of the amount the worker would be receiving if still living, or 82.5 percent of the PIA.

Children of deceased workers are eligible to receive monthly benefits equal to 75 percent of the worker's PIA, as are mothers and fathers younger than age 65 who are caring for at least one child younger than age 16 or a disabled child. A dependent parent age 62 or older is eligible for monthly benefits equal to 82.5 percent, and each of two dependent parents, for benefits equal to 75 percent of the deceased worker's PIA. For detailed information, consult the *Social Security Bulletin, Annual Statistical Supplement* (1997), p. 59.

Series Bf464 and Bf472-473. For series Bf464, a wife's entitlement is based on her age. In the disabled-worker categories, a wife's entitlement is based on care of children.

Series Bf475. Assumes the workers began to work at age 22, retired at the beginning of the year, and had no prior period of disability. The observation in 1968 is effective in February of that year. In 1982, the figure was derived from the transitional guarantee computation based on the 1978 PIA table. The benefit for women was identical except for the period 1962 to 1977, when the male maximum was approximately 97 percent of the female maximum.

TABLE Bf476-483 Old-Age, Survivors, Disability, and Health Insurance – average monthly benefit received by retired workers, by sex: 1940-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Men				Women			
	All benefits	Without reduction for early retirement	With reduction for early retirement		All benefits	Without reduction for early retirement	With reduction for early retirement	
			Before reduction	After reduction			Before reduction	After reduction
			Bf476	Bf477			Bf478	Bf479
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	
1940	23.17	23.17	—	—	18.37	18.37	—	—
1941	23.32	23.32	—	—	18.48	18.48	—	—
1942	23.71	23.71	—	—	18.73	18.73	—	—
1943	24.17	24.17	—	—	19.06	19.06	—	—
1944	24.48	24.48	—	—	19.35	19.35	—	—
1945	24.94	24.94	—	—	19.51	19.51	—	—
1946	25.30	25.30	—	—	19.64	19.64	—	—
1947	25.68	25.68	—	—	19.91	19.91	—	—
1948	26.21	26.21	—	—	20.11	20.11	—	—
1949	26.92	26.92	—	—	20.58	20.58	—	—
1950	45.67	45.67	—	—	35.05	35.05	—	—
1951	44.44	44.44	—	—	33.03	33.03	—	—
1952	52.16	52.16	—	—	39.17	39.17	—	—
1953	54.46	54.46	—	—	40.66	40.66	—	—
1954	63.34	63.34	—	—	47.05	47.05	—	—
1955	66.40	66.40	—	—	49.93	49.93	—	—
1956	68.23	68.23	—	—	51.16	51.16	53.64	48.20
1957	70.47	70.47	—	—	52.23	52.98	55.33	49.08
1958	72.74	72.74	—	—	53.55	54.62	57.06	50.27
1959	80.11	80.11	—	—	58.81	60.34	63.18	55.16
1960	81.90	81.90	—	—	59.70	61.60	64.19	55.80
1961	83.13	83.84	76.94	69.01	62.00	64.87	65.84	57.20
1962	33.79	85.26	80.03	71.24	62.61	66.10	66.41	57.59
1963	84.69	36.81	81.63	72.21	63.42	67.48	67.11	58.23
1964	85.58	88.37	82.72	72.85	64.28	69.01	67.88	58.87
1965	92.60	96.10	90.14	79.40	70.10	75.40	73.82	64.50
1966	93.26	97.37	90.98	80.26	70.79	76.40	75.47	65.21
1967	94.49	99.33	92.53	81.53	71.92	78.28	76.46	66.01
1968	109.08	115.02	106.95	95.29	84.24	91.89	88.90	77.75
1969	110.96	117.78	109.16	97.06	85.71	94.51	90.13	78.99

Note appears at end of table

(continued)

TABLE Bf476-483 Old-Age, Survivors, Disability, and Health Insurance – average monthly benefit received by retired workers, by sex: 1940-1998 *Continued*

Year	Men				Women			
	All benefits	Without reduction for early retirement	With reduction for early retirement		All benefits	Without reduction for early retirement	With reduction for early retirement	
			Before reduction	After reduction			Before reduction	After reduction
	Bf476	Bf477	Bf478	Bf479	Bf480	Bf481	Bf482	Bf483
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	
1970	130.53	139.10	128.89	115.30	101.20	111.70	105.60	93.77
1971	146.13	156.39	144.06	129.84	113.60	126.24	118.05	105.29
1972	179.44	192.37	176.93	161.04	140.11	156.20	144.53	130.26
1973	182.60	197.00	181.00	164.20	145.80	164.00	148.84	135.00
1974	206.56	223.55	205.80	186.91	165.47	186.21	171.40	154.09
1975	227.80	247.20	228.20	207.20	181.80	205.90	190.57	169.38
1976	247.70	269.81	249.60	226.30	197.08	223.51	200.14	183.17
1977	268.40	293.20	271.90	246.24	212.60	242.50	222.10	197.83
1978	291.60	319.90	296.60	267.85	229.70	263.80	240.50	213.81
1979	326.80	359.30	332.60	299.95	256.50	296.70	262.90	237.99
1980	380.20	419.60	—	349.50	296.80	346.50	—	274.60
1981 ¹	431.10	479.50	—	395.10	334.50	394.00	—	308.80
1982	469.60	528.20	—	426.90	362.20	432.60	—	332.40
1983	495.00	565.50	—	444.30	379.60	460.50	—	345.40
1984	517.80	598.30	—	462.70	396.50	487.00	—	358.90
1985	538.40	627.50	—	480.50	412.10	511.00	—	372.00
1986	549.80	644.60	—	491.00	420.50	525.10	—	379.10
1987 ¹	577.50	679.20	—	516.90	441.20	553.70	—	397.70
1988	604.90	713.40	—	542.40	462.00	582.60	—	416.20
1989	638.90	755.20	—	573.80	487.90	617.10	—	439.10
1990	679.30	803.60	—	611.20	518.60	656.80	—	466.40
1991	709.30	840.50	—	638.90	541.60	687.00	—	486.80
1992	735.50	872.50	—	663.30	561.80	712.90	—	504.70
1993	759.30	901.70	—	685.80	580.70	736.90	—	521.50
1994	785.20	932.80	—	710.50	601.30	762.10	—	540.20
1995	810.20	963.70	—	735.40	621.20	780.40	—	563.80
1996	838.10	997.80	—	763.10	643.70	788.00	—	593.90
1997	860.50	1,025.10	—	786.60	662.50	771.30	—	626.10
1998	876.90	1,044.50	—	802.40	675.90	785.40	—	639.50

¹ Data based on unedited monthly estimates.

Sources

Social Security Bulletin, Annual Statistical Supplement (1971), Table 76, p. 95; (1981), Table 91, pp. 160-1; (1988), Table 5.B8, p. 189; (1999), Table 5.B8, p. 209.

Documentation

This table provides information on the average monthly benefit received by retired workers under the Old-Age, Survivors Insurance program. Benefits payable to workers who retire at the normal retirement age, currently age 65, are equal to 100 percent of the primary insurance amount (PIA). The normal retirement age is scheduled to rise gradually from 65 to 67, with the first increase affecting workers who reach age 62 in the year 2000. Retired workers are eligible to receive benefits at a permanently reduced rate beginning at age 62. The extent of reduction depends on the number of benefit payments received for months before the normal retirement age. The annual rate of reduction amounts to $6\frac{2}{3}$ percent for each of the first three years, and eventually (after the age for full benefits is established at age 67) 5 percent for each of the next two years the worker receives benefits before the normal retirement age. Workers receiving benefits at age 62 are eligible to receive benefits equal to 80 percent of the PIA ($6\frac{2}{3}$ multiplied by 3). This rate will decline to 75 and 70 percent, respectively, as the normal retirement age increases.

Workers who postpone their retirement beyond the normal retirement age have their benefits increased through the delayed retirement credit for each month benefits are foregone owing to earnings above the exempt amount. Spouses of retired workers are eligible for monthly benefits at age 62. Their benefits are equal to 50 percent of the worker's PIA for the first entitlement at the normal age but are permanently reduced if payments to the retired worker begin earlier. The annual rate of reduction is $8\frac{2}{3}$ percent for the first three years, and eventually 5 percent for the next two years the spouse receives benefits before reaching the normal retirement age. Children of retired workers are also eligible to receive monthly benefits equal to 50 percent of the worker's PIA, as are spouses younger than age 65 who are caring for at least one child younger than age 16 or disabled child age 18 or older of the worker. For more information, see the summary of Old-Age, Survivors, and Disability Insurance benefit types and levels (*Social Security Bulletin, Annual Statistical Supplement*, 1997, p. 59).

The OASI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied.

Series Bf478 and Bf482. These series are believed to show what the worker would have earned upon retirement at age 65 if they had not retired early. The series were no longer reported in the annual statistical supplements after 1979.

TABLE BF484-496 Unemployment Insurance - coverage, benefits, and financing: 1938-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Average monthly covered employment		Average weekly insured unemployment		First payments		Average weekly initial claims		Average weekly benefit amount		Average weekly benefit as percentage of average weekly wage		Average actual duration of benefit payments		Claimants exhausting benefits		Average actual duration of benefits for exhaustees		Total benefits paid		Total contributions collected		Taxable wages paid in covered employment during year		Net reserves, balance as of end of year	
	Number	Number	Number	Number	Number	Number	Number	Number	Dollars	Dollars	Percent	Percent	Weeks	Weeks	Number	Number	Weeks	Weeks	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars
1938	19,969,577	—	—	—	—	—	—	10.94	43.1	0.0	0.0	—	0.0	—	393,783	818,501	818,501	818,501	393,783	818,501	25,775,045	1,110,625				
1939	21,418,945	—	—	—	—	—	—	10.66	40.8	0.0	0.0	—	0.0	—	429,298	824,876	824,876	824,876	429,298	824,876	28,463,115	1,537,797				
1940	23,092,402	—	—	—	—	—	—	10.56	39.1	9.8	9.8	3.1	9.8	2,590,183	853,750	853,750	853,750	518,700	853,750	30,110,665	1,817,110					
1941	26,804,701	—	—	—	—	—	—	11.06	36.6	9.4	9.4	3.6	9.4	1,543,533	1,006,328	1,006,328	1,006,328	344,324	1,006,328	38,676,791	2,524,463					
1942	29,347,087	—	—	—	—	—	—	12.66	35.3	10.0	10.0	3.3	10.0	1,077,753	1,139,333	1,139,333	1,139,333	344,083	1,139,333	49,720,608	3,387,888					
1943	30,825,503	—	—	—	—	—	—	13.84	33.6	9.0	9.0	3.6	9.0	193,891	1,325,423	1,325,423	1,325,423	79,644	1,325,423	59,048,952	4,715,510					
1944	30,043,750	—	—	—	—	—	—	15.90	35.9	7.7	7.7	3.5	7.7	101,745	1,317,049	1,317,049	1,317,049	62,384	1,317,049	60,637,087	6,071,925					
1945	28,405,595	—	—	—	—	—	—	18.77	41.6	8.5	8.5	4.6	8.5	250,440	1,161,883	1,161,883	1,161,883	445,867	1,161,883	58,544,835	6,914,010					
1946	30,229,654	—	—	—	—	—	—	18.50	39.6	13.4	13.4	3.6	13.4	1,098,928	1,094,845	1,094,845	1,094,845	1,094,845	1,094,845	63,690,396	6,860,044					
1947	32,272,248	—	—	—	—	—	—	17.83	34.6	11.1	11.1	3.6	11.1	1,271,821	1,095,522	1,095,522	1,095,522	775,142	1,095,522	72,981,066	7,303,287					
1948	33,084,302	—	—	—	—	—	—	19.03	34.1	10.7	10.7	3.4	10.7	1,027,530	999,635	999,635	999,635	789,931	999,635	78,536,164	7,602,964					
1949	31,695,005	—	—	—	—	—	—	20.48	36.0	11.8	11.8	3.6	11.8	1,934,709	986,906	986,906	986,906	1,735,991	986,906	76,267,263	7,009,585					
1950	32,886,694	—	—	—	—	—	—	20.76	34.4	13.0	13.0	3.4	13.0	1,853,336	1,373,113	1,373,113	1,373,113	1,853,336	1,373,113	81,545,274	6,972,181					
1951	34,857,403	—	—	—	—	—	—	21.09	32.2	10.1	10.1	3.2	10.1	810,580	840,411	840,411	840,411	840,411	840,411	90,242,251	7,781,930					
1952	35,576,997	—	—	—	—	—	—	22.79	33.0	10.4	10.4	3.3	10.4	931,362	998,238	998,238	998,238	998,238	998,238	94,669,424	8,327,427					
1953	36,667,115	—	—	—	—	—	—	23.58	32.3	10.1	10.1	3.2	10.1	764,420	962,219	962,219	962,219	962,219	962,219	99,629,885	8,912,680					
1954	35,371,999	—	—	—	—	—	—	24.93	33.5	12.8	12.8	3.3	12.8	1,768,927	2,026,868	2,026,868	2,026,868	2,026,868	2,026,868	96,539,455	8,218,954					
1955	36,590,254	—	—	—	—	—	—	25.04	32.1	12.4	12.4	3.2	12.4	1,272,231	1,350,264	1,350,264	1,350,264	1,350,264	1,350,264	101,574,717	8,260,724					
1956	38,983,356	—	—	—	—	—	—	27.02	33.3	11.4	11.4	3.3	11.4	980,790	1,380,728	1,380,728	1,380,728	1,380,728	1,380,728	109,817,323	8,573,431					
1957	41,286,214	—	—	—	—	—	—	28.17	33.5	11.5	11.5	3.3	11.5	1,139,246	1,544,233	1,544,233	1,544,233	1,544,233	1,544,233	112,829,744	8,659,312					
1958	38,110,003	—	—	—	—	—	—	30.54	35.3	14.8	14.8	3.5	14.8	2,506,896	3,512,732	3,512,732	3,512,732	3,512,732	3,512,732	109,154,231	6,831,292					
1959	39,544,909	—	—	—	—	—	—	30.40	33.4	13.1	13.1	3.3	13.1	1,675,963	2,279,018	2,279,018	2,279,018	2,279,018	2,279,018	115,302,625	6,674,297					
1960	40,198,155	—	—	—	—	—	—	32.87	35.2	12.7	12.7	3.2	12.7	1,603,518	2,726,849	2,726,849	2,726,849	2,726,849	2,726,849	119,181,579	6,418,822					
1961	40,059,163	—	—	—	—	—	—	33.80	35.4	14.7	14.7	3.4	14.7	2,366,012	3,422,558	3,422,558	3,422,558	3,422,558	3,422,558	119,344,649	5,567,780					
1962	41,286,214	—	—	—	—	—	—	34.56	34.9	13.1	13.1	3.4	13.1	1,638,466	2,675,565	2,675,565	2,675,565	2,675,565	2,675,565	125,537,437	6,038,626					
1963	42,013,516	—	—	—	—	—	—	35.28	34.6	13.3	13.3	3.4	13.3	1,572,071	3,018,817	3,018,817	3,018,817	3,018,817	3,018,817	129,569,191	6,421,119					
1964	43,200,252	—	—	—	—	—	—	35.96	33.8	13.0	13.0	3.3	13.0	1,370,982	2,521,575	2,521,575	2,521,575	2,521,575	2,521,575	136,337,595	7,090,270					
1965	45,098,297	—	—	—	—	—	—	37.19	33.8	12.2	12.2	3.3	12.2	1,087,384	2,166,011	2,166,011	2,166,011	2,166,011	2,166,011	143,988,969	8,172,316					
1966	47,684,227	—	—	—	—	—	—	39.76	34.7	11.2	11.2	3.4	11.2	780,749	1,771,292	1,771,292	1,771,292	1,771,292	1,771,292	156,958,490	9,664,712					
1967	48,792,640	—	—	—	—	—	—	41.25	34.7	11.4	11.4	3.4	11.4	867,446	2,092,364	2,092,364	2,092,364	2,092,364	2,092,364	161,096,708	10,702,198					
1968	50,354,124	—	—	—	—	—	—	43.43	34.3	11.6	11.6	3.3	11.6	848,037	2,029,957	2,029,957	2,029,957	2,029,957	2,029,957	171,389,505	11,715,954					
1969	52,362,457	—	—	—	—	—	—	46.17	34.4	11.4	11.4	3.4	11.4	810,718	2,125,809	2,125,809	2,125,809	2,125,809	2,125,809	181,762,193	12,636,017					
1970	52,168,445	—	—	—	—	—	—	50.31	35.7	12.3	12.3	3.5	12.3	1,302,628	3,847,312	3,847,312	3,847,312	3,847,312	3,847,312	182,707,427	11,902,575					
1971	52,079,721	—	—	—	—	—	—	54.35	36.5	14.4	14.4	3.6	14.4	2,057,217	4,951,507	4,951,507	4,951,507	4,951,507	4,951,507	182,755,684	9,725,314					
1972	56,618,236	—	—	—	—	—	—	56.68	36.7	14.2	14.2	3.6	14.2	1,811,376	4,481,854	4,481,854	4,481,854	4,481,854	4,481,854	236,355,573	9,402,983					
1973	59,911,079	—	—	—	—	—	—	59.00	36.1	13.4	13.4	3.6	13.4	1,495,092	4,005,191	4,005,191	4,005,191	4,005,191	4,005,191	254,896,173	10,882,144					
1974	61,254,089	—	—	—	—	—	—	64.34	36.6	12.6	12.6	3.6	12.6	1,926,133	5,977,411	5,977,411	5,977,411	5,977,411	5,977,411	265,375,024	10,520,181					
1975	59,143,407	—	—	—	—	—	—	70.23	37.1	15.7	15.7	3.7	15.7	4,195,023	11,753,643	11,753,643	11,753,643	11,753,643	11,753,643	261,521,631	3,070,231					
1976	61,208,766	—	—	—	—	—	—	75.16	37.1	14.9	14.9	3.7	14.9	3,262,282	8,972,657	8,972,657	8,972,657	8,972,657	8,972,657	301,106,223	871,380					
1977	63,602,710	—	—	—	—	—	—	78.79	36.4	14.2	14.2	3.6	14.2	2,776,387	9,170,529	9,170,529	9,170,529	9,170,529	9,170,529	324,182,674	950,381					
1978	68,565,923	—	—	—	—	—	—	83.67	36.4	13.3	13.3	3.6	13.3	2,030,423	7,722,347	7,722,347	7,722,347	7,722,347	7,722,347	411,988,796	4,554,185					
1979	71,631,725	—	—	—	—	—	—	89.68	36.0	13.1	13.1	3.6	13.1	2,037,095	8,556,908	8,556,908	8,556,908	8,556,908	8,556,908	444,278,867	8,582,608					

(continued)

TABLE Bf484-496 Unemployment Insurance - coverage, benefits, and financing: 1938-1997 Continued

Year	Average monthly covered employment		Average weekly insured unemployment		First payments		Average weekly initial claims		Average weekly benefit amount		Average weekly benefit as percentage of average weekly wage		Average actual duration of benefit payments		Claimants exhausting benefits		Average actual duration of benefits for exhaustees		Total contributions collected		Taxable wages paid in covered employment during year		Net reserves, balance as of end of year		
	Bf484	Number	Bf485	Number	Bf486	Number	Bf487	Number	Bf488	Dollars	Bf489	Percent	Bf490	Weeks	Bf491	Number	Bf492	Weeks	Bf493	Thousand dollars	Bf494	Thousand dollars	Bf495	Thousand dollars	Bf496
1980	71,258,455	3,355,747	9,992,123	479,769	99.66	36.6	479,769	3,071,943	14.9	3,071,943	22.7	13,768,135	11,414,649	458,643,511	6,591,827										
1981	71,965,970	3,044,857	9,407,372	450,846	106.61	35.9	450,846	2,989,177	14.4	2,989,177	23.0	13,221,592	11,624,545	478,414,824	5,745,115										
1982	70,331,861	4,058,646	11,648,448	579,252	119.34	37.7	579,252	4,174,709	15.9	4,174,709	23.2	20,649,840	12,206,070	477,471,932	2,644,584										
1983	70,817,863	3,394,666	8,907,190	441,653	123.59	37.2	441,653	4,179,622	17.5	4,179,622	23.4	17,755,392	14,548,669	532,288,687	5,803,331										
1984	75,204,621	2,474,809	7,742,547	371,773	123.47	35.5	371,773	2,606,145	14.4	2,606,145	22.8	12,598,229	18,757,690	586,020,262	2,204,797										
1985	77,467,012	2,616,958	8,372,070	390,294	128.14	35.3	390,294	2,572,059	14.2	2,572,059	22.7	14,124,342	19,296,983	611,969,897	10,069,416										
1986	79,093,152	2,642,644	8,360,752	376,227	135.65	35.8	376,227	2,687,723	14.5	2,687,723	22.9	15,402,735	18,111,266	638,038,517	15,402,260										
1987	81,352,396	2,300,399	7,203,357	326,153	140.55	35.5	326,153	2,408,471	14.6	2,408,471	22.7	13,617,007	17,576,976	667,498,815	23,174,690										
1988	83,984,776	2,080,582	6,860,662	312,882	144.97	34.9	312,882	1,979,285	13.7	1,979,285	22.7	12,579,703	17,720,628	705,002,395	31,103,671										
1989	86,164,595	2,157,666	7,368,766	328,819	151.73	35.4	328,819	1,940,390	13.2	1,940,390	22.9	13,641,569	16,451,876	738,265,107	36,870,882										
1990	87,008,189	2,521,564	8,628,557	387,001	161.56	36.0	387,001	2,323,255	13.4	2,323,255	23.1	17,320,777	15,221,274	759,670,530	37,937,017										
1991	84,905,782	3,341,935	10,074,550	447,593	169.88	36.4	447,593	3,472,019	15.4	3,472,019	23.2	24,582,501	14,510,670	751,666,268	30,488,785										
1992	85,098,137	3,245,191	9,243,338	407,344	173.64	35.4	407,344	3,838,011	16.2	3,838,011	23.3	23,956,510	16,972,655	776,502,595	25,846,579										
1993	86,850,536	2,751,441	7,884,326	342,309	179.62	36.0	342,309	3,203,897	15.9	3,203,897	23.4	20,687,678	19,831,045	807,165,885	28,001,956										
1994	89,690,770	2,669,872	7,959,281	342,730	182.16	35.7	342,730	2,977,468	15.5	2,977,468	23.2	20,433,832	21,802,069	856,255,509	31,343,551										
1995	92,328,088	2,571,951	8,035,229	357,041	187.29	35.5	357,041	2,661,773	14.7	2,661,773	23.1	20,122,189	21,970,828	889,901,028	35,403,296										
1996	94,685,734	2,595,585	7,989,615	351,361	189.45	34.5	351,361	2,738,963	14.9	2,738,963	23.2	20,634,904	21,577,968	923,895,199	38,631,922										
1997	97,837,884	2,322,573	7,325,279	321,511	192.76	33.5	321,511	2,484,911	14.6	2,484,911	23.0	18,605,353	21,247,040	970,110,253	43,833,157										

Sources

All series except series Bf487. Unemployment Insurance Financial Data Handbook number 394 from the Information Technology Support Center (ITSC) in Maryland.

Series Bf487. Through 1966, data were collected by the Bureau of the Census from monthly issues of the U.S. Manpower Administration's Unemployment Statistics. Beginning in 1967, data are from evidence posted February 24, 2000, on the U.S. Department of Labor, Employment Training Administration Internet site.

Documentation

ITSC is a collaboration of state employment security agencies, the Department of Labor (DOL), and private sector partners. Most of these data were compiled from monthly and quarterly statistical and accounting reports submitted by the State Employment Security agencies to the U.S. Employment and Training Administration of the U.S. Department of Labor. Revised data and corrections have been incorporated into this edition to the extent possible. Data contained in this handbook may not be identical with state records.

The Social Security Act of 1935 established Unemployment Insurance (UI) as a federally mandated program run by the states. The states collect payroll taxes from employers to fund the system. After the Social Security Act passed, the states had to pass enabling legislation and then wait two years to accumulate enough reserves to begin paying benefits. Because Wisconsin had passed an unemployment insurance act prior to 1935, it was the first state to pay benefits. By 1938, roughly 75 percent of payrolls were covered by unemployment insurance. The percentage rose to a peak of 98 percent in 1979 and fell back to about 92.4 percent in 1994.

To fund the system, employers pay taxes on employee earnings up to a specific maximum per employee in each state. Part of the taxes (0.4 percent of taxable wages in 1970) is remitted to the federal government, which in turn provides grants to the states for the cost of administering unemployment

insurance and employment services. The payroll contribution rates for individual employers vary to some extent in response to the unemployment experience of workers in the employer's operation.

Reimbursable coverage has been excluded from series Bf484 and Bf493-495. However, the claims resulting from reimbursable coverage have not been excluded from series Bf485-486 and Bf488-492.

In June 1962, employees engaged in the agricultural aspects of the sugar cane industry who were previously covered under a special unemployment insurance law were brought under the Puerto Rico Employment Security Act of 1957.

Series Bf484. Average monthly covered employment represents the twelve-month average of the covered employees reported to states by each employer for 1938-1944 for the last payroll period in the month. For 1945-1962, data represent the twelve-month average for the payroll period ending nearest the fifteenth day of the month. After 1963, data represent the twelve-month average for the payroll period including the twelfth day of the month. Covered employment represents employment in industrial and commercial establishments of eight or more for the period 1941-1955 and four or more for 1956 to 1970. In some states, the covered employment also represents employment in smaller establishments and for additional groups of workers, such as state and local employees or seamen. Although the federal law requires only employers to pay taxes, some states require some workers to contribute as well.

Series Bf484-485. Beginning in 1964, the series on the average number of weekly insured employment, series Bf485, includes workers in the sugar cane industry, while series Bf484 excludes them.

Series Bf487. Calculated as an average for the year of the number of initial claims for unemployment insurance filed each week. An initial claim is "any notice of unemployment filed (1) to request a determination of entitlement to and eligibility for compensation or (2) to begin a second or subsequent period of eligibility within a benefit year or period of eligibility."

Series Bf489. Unemployed workers begin receiving benefits in most states after a waiting period of one week is served. In the late 1930s, the benefits typically replaced 50 percent of weekly earnings up to a weekly maximum benefit level. The weekly maximum has often served to reduce benefits as a percent of average weekly wages to roughly 33 to 41 percent. From 1938 through 1970, the percentage of the weekly wage has reimbursable coverage in the numerator but not in the denominator.

Series Bf490. The states establish maximum durations for payments that ranged from 12 to 22.6 weeks in the late 1930s. The maximums rose such that by 1970 workers could receive benefits for up to 20 to 36 weeks, depending on the state. The average actual duration of benefit payments is calculated as the number of weeks compensated during the year divided by the number of first payments.

Series Bf492. The number of weeks compensated for all individuals exhausting benefits divided by the total number of people who receive benefits for the maximum number of weeks during the year.

Series Bf493. Excludes reconversion unemployment benefits for seamen of \$1,018,777 in 1947, \$3,330,528 in 1948, \$1,286,940 in 1949, \$311,739 in 1950, and \$1,941 in 1951.

Series Bf494. Includes state unemployment taxes paid by employers and the contributions from employees in states that tax workers. Also includes penalties and interest for those states in which the law requires that these items be used to pay benefits. The data in this series have been adjusted for refunds of contributions. Contributions collected are the cash payments received during the calendar year and are not equal to total collections due for that year. In 1938 and 1939, the series includes receipts from railroad and related employers subject to the Railroad Unemployment Insurance Act after 1939.

Series Bf495. Wages paid to covered employees who are subject to state unemployment insurance taxes during the calendar year.

Series Bf496. Total reserves minus the balance of federal loans to state reserve funds.

TABLE Bf497-510 Railroad unemployment insurance and sickness benefits - applications, claims, beneficiaries, and payments: 1940-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Unemployment benefits										Sickness benefits																				
	Applications received					Accounts exhausted					Payments					Applications received					Accounts exhausted					Payments					
	Number	Bf497	Bf498	Bf499	Bf500	Bf501	Bf502	Bf503	Average amount	Total amount	Number	Bf504	Bf505	Bf506	Bf507	Bf508	Bf509	Bf510	Average amount	Total amount	Number	Bf511	Bf512	Bf513	Bf514	Bf515	Bf516	Bf517	Bf518	Bf519	Bf520
1940	211,000	1,258,000	161,000	29,000	1,001,000	14,810	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1941	181,000	517,000	164,000	27,000	999,000	17,699	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1942	90,000	101,000	80,000	11,000	448,000	8,890	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1943	22,000	27,000	18,000	3,000	79,000	1,753	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1944	7,000	35,000	5,000	(Z)	21,000	547	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1945	9,000	847,000	6,000	1,000	27,000	728	26.47	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1946	201,000	1,763,000	157,000	15,000	731,000	20,517	28.01	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1947	257,000	1,347,000	225,000	48,000	1,583,000	46,617	29.41	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1948	267,000	1,706,000	210,000	22,000	1,146,000	32,426	28.57	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1949	347,000	3,731,000	286,000	20,000	1,531,000	46,745	30.70	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1950	562,000	1,028,000	506,000	83,000	3,475,000	113,769	32.72	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1951	233,000	905,000	181,000	17,000	912,000	24,780	27.53	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1952	220,000	1,305,000	162,000	11,000	823,000	22,741	28.06	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1953	264,000	2,118,000	224,000	15,000	1,202,000	53,849	45.26	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1954	316,000	2,785,000	265,000	34,000	1,981,000	95,541	48.68	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1955	371,000	1,123,000	320,000	77,000	2,594,000	152,668	59.06	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1956	177,000	1,553,000	149,000	22,000	1,022,000	55,456	54.98	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1957	279,000	2,746,000	221,000	28,000	1,434,000	83,154	58.23	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1958	391,000	2,765,000	312,000	67,000	2,595,000	169,214	65.42	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1959	265,000	2,026,000	300,000	90,000	2,636,000	193,118	67.09	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1960	254,000	2,663,000	221,000	51,000	—	208,554	79.49	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1961	359,000	2,048,000	319,000	68,000	2,546,000	206,651	80.40	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1962	231,000	1,572,000	215,000	50,000	1,995,000	156,788	78.79	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1963	213,000	1,188,000	191,000	34,000	1,506,000	116,789	78.38	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1964	172,000	979,000	152,000	24,000	1,137,000	86,563	77.42	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

Notes appear at end of table

(continued)

TABLE Bf497-510 Railroad unemployment insurance and sickness benefits - applications, claims, beneficiaries, and payments: 1940-1998 Continued

Year	Unemployment benefits										Sickness benefits																																																																																																																																																																																																																																																																																																																																																																																																																																																																													
	Applications received					Claims received					Beneficiaries					Accounts exhausted					Payments																																																																																																																																																																																																																																																																																																																																																																																																																																																																			
	Number	Bf497	Bf498	Bf499	Bf500	Number	Bf501	Bf502	Bf503	Bf504	Number	Bf505	Bf506	Bf507	Number	Bf508	Bf509	Bf510	Number	Bf505	Bf506	Bf507	Number	Bf508	Bf509	Bf510	Number	Bf505	Bf506	Bf507	Number	Bf508	Bf509	Bf510	Average amount																																																																																																																																																																																																																																																																																																																																																																																																																																																					
1965	153,000	727,000	127,000	19,000	926,900	78.97	142,000	688,000	106,000	20,000	647,800	43,984	91.37	1966	175,000	525,000	153,000	10,000	476,673	71.26	134,000	631,000	101,000	18,000	594,700	40,447	91.15	1967	751,000	81,000	751,000	8,000	744,400	127,000	16,000	552,900	36,477	91.00	1968	275,000	516,000	233,000	9,000	710,900	61.45	121,000	560,000	88,000	14,000	522,600	34,052	90.80	1969	112,000	438,000	96,000	8,000	408,800	88.85	128,000	684,000	93,000	16,000	646,300	55,747	110.63	1970	98,000	438	79,000	6,000	407,400	91.84	121,000	707,000	91,000	17,000	674,000	57,927	112.87	1971	330,600	748,700	249,000	8,300	449,577	68.34	113,800	671,500	86,000	15,200	632,800	50,140	113.26	1972	392,100	1,095,300	317,000	14,100	1,015,800	82.28	108,700	612,000	82,000	12,600	571,200	39,407	112.48	1973	128,000	505,800	105,000	7,800	476,100	91.46	97,800	527,300	74,000	9,800	491,800	31,634	112.09	1974	60,600	274,000	48,000	4,000	254,500	95.19	94,800	487,300	71,000	8,500	450,000	28,053	111.45	1975	108,600	443,400	77,900	4,800	411,600	94.28	89,600	453,300	67,400	7,900	417,900	29,564	111.26	1976	133,000	875,100	105,300	20,500	826,500	142,983	103,000	511,800	76,900	11,200	473,000	74,930	204.92	1977	102,500	640,800	84,600	13,400	604,500	190.75	107,600	549,900	82,200	12,400	514,200	77,973	230.63	1978	112,200	652,700	94,900	10,500	614,900	195.05	107,800	511,300	81,800	11,100	482,200	71,197	232.06	1979	124,800	580,600	97,200	7,100	531,900	198.69	103,500	485,800	78,300	10,100	454,700	64,235	231.73	1980	136,900	650,200	101,600	11,200	596,500	198.79	102,800	468,300	76,800	9,500	428,500	60,043	231.04	1981	156,200	1,116,700	121,900	27,900	1,070,600	216,028	99,700	458,600	75,200	9,400	422,300	60,613	231.88	1982	210,000	1,322,900	152,400	36,000	1,247,400	247,674	94,100	346,800	71,800	9,300	409,800	54,716	232.15	1983	236,700	2,023,500	182,900	67,600	1,894,500	394,364	82,300	423,300	62,900	10,000	388,200	56,721	234.65	1984	132,700	1,123,400	115,600	34,400	1,065,800	216,348	72,100	370,600	57,200	8,800	345,600	45,434	234.10	1985	105,300	695,200	81,700	16,100	648,500	126,426	201.03	342,100	51,600	8,000	316,900	43,783	234.16	1986	112,300	754,500	87,600	17,400	706,800	140,452	205.56	356,400	45,200	8,800	329,400	47,397	233.87	1987	90,400	680,000	75,200	17,000	680,000	118,573	63,500	346,800	49,500	9,100	319,100	55,735	232.82	1988	68,500	456,100	54,400	10,600	417,800	85,774	54,500	323,600	41,700	8,400	295,200	24,834	232.85	1989	49,200	306,000	35,200	6,600	286,200	60,798	47,700	286,300	33,700	7,600	245,000	32,136	271.35	1990	39,600	298,900	29,900	5,600	230,900	57,215	41,900	270,400	28,200	6,100	208,700	32,566	285.74	1991	46,100	309,500	30,500	5,900	245,400	60,102	37,800	257,100	25,600	5,300	192,000	32,567	289.93	1992	32,900	280,700	26,400	5,900	236,600	55,104	34,200	233,000	23,600	5,300	184,900	12,037	290.93	1993	27,200	215,300	20,700	4,300	182,500	49,188	31,700	205,000	21,800	4,600	167,600	21,546	307.33	1994	22,600	187,700	18,600	4,000	158,700	40,441	30,900	205,100	21,600	4,700	170,000	25,437	312.94	1995	23,700	158,000	18,700	2,900	129,900	37,357	29,100	196,200	21,000	4,300	163,000	24,198	336.36	1996	22,400	162,400	16,800	3,400	134,800	40,678	28,000	194,100	20,400	4,400	162,900	25,759	337.84	1997	19,500	130,200	15,300	2,700	114,900	35,769	27,400	184,300	20,500	4,300	154,600	32,475	372.03	1998	13,700	86,800	11,300	2,100	71,500	27,034	26,600	171,100	20,500	4,300	147,500	33,058	385.40

(Z) Fewer than 500 accounts.
 1 Includes supplemental extended unemployment benefits paid to certain workers. See text.
Source U.S. Railroad Retirement Board, *Statistical Tables: Data through Fiscal Year 1998*, Tables C1 and C2.
Documentation The Railroad Unemployment Insurance Act of 1938 was established to provide unemployment benefits for railroad workers who were often denied coverage under state programs because of the interstate nature of their employment. The Act established a system of benefits for unemployed railroad workers that was financed entirely by railroad employers and administered by the Railroad Retirement Board. The Railroad system covers the entire United States and is similar to the Unemployment Insurance (UI) system described in the text for Table Bf484-496.
 In 1940 a uniform benefit year was established, and sickness benefits were added in 1946. As of 1997, contribution rates for employers ranged from 0.65 to 12 percent, and benefits were paid for compensable days of unemployment and sickness at a daily rate of 60 percent of the employee's wage subject to a \$42.00 maximum and a \$12.70 minimum.

Between 1946 and 1997, several amendments have changed benefit levels and employer contribution requirements. For a full, detailed history of the Railroad Unemployment Insurance System, see the *1997 Railroad Retirement and Unemployment Insurance Systems Handbook*.

All data are reported in a June-July benefit year, rather than a fiscal year.

Series Bf501. From 1983 to 1985, includes beneficiaries who received supplemental extended unemployment benefits.

Series Bf501-503 and Bf508-510. Not adjusted for recoveries or settlements of underpayments.

Series Bf502. For 1983-1986, includes supplemental extended unemployment benefits paid to certain workers with less than ten years of service. These benefits totaled \$37,731,000 in 1982-1983,

\$13,395,000 in 1983-1984, \$654,000 in 1984-1985, and \$22,400 in 1985-1986 and were financed from general revenues.

Series Bf503 and Bf510. Represents the average amount per two-week claim period. Over the period 1940-1965, beneficiaries are based on a 10 percent sample for unemployment and sickness payments and a 20 percent sample for maternity. From 1966 to 1975, the number of beneficiaries is based on a 20 percent sample, while universal data are used after 1975.

Series Bf504-510. Includes maternity benefits.

TABLE Bf511-524 Workers' compensation - workers covered, benefit payments, and costs: 1939-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Benefits paid										Per \$100 of covered payroll				NASI estimates				
	Workers covered					Disability and survivor benefits					Source of payments					Per \$100 of covered payroll		Per \$100 of covered payroll	
	Million	Million dollars	Million dollars	Million dollars	Million dollars	Total	Disability	Survivor	Private insurance carriers	Disbursements from state and federal funds	Employers' self-insurance	Cost of programs	Benefits paid	Workers covered	Cost of programs	Benefits paid	Workers covered	Cost of programs	Benefits paid
Bf511	Bf512	Bf513	Bf514	Bf515	Bf516 ¹	Bf517	Bf518	Bf519	Bf520	Bf521	Bf522	Bf523	Bf524	Bf525	Bf526	Bf527	Bf528	Bf529	Bf530
1939	—	235	85	150	120	30	122	68	44	—	—	—	—	—	—	—	—	—	—
1940	24.6	256	95	161	129	32	135	73	48	—	—	—	—	—	—	—	—	—	—
1941	—	291	100	191	157	34	160	77	54	—	—	—	—	—	—	—	—	—	—
1942	—	329	108	221	185	36	190	81	57	—	—	—	—	—	—	—	—	—	—
1943	—	353	112	241	203	38	213	81	59	—	—	—	—	—	—	—	—	—	—
1944	—	385	120	265	225	40	237	86	63	—	—	—	—	—	—	—	—	—	—
1945	—	408	125	283	241	42	253	91	65	—	—	—	—	—	—	—	—	—	—
1946	32.7	434	140	294	250	44	270	96	68	—	—	—	—	—	—	—	—	—	—
1947	—	486	160	326	280	46	302	110	74	—	—	—	—	—	—	—	—	—	—
1948	36.0	534	175	359	309	50	335	121	78	—	—	—	—	—	—	—	—	—	—
1949	35.3	566	185	381	329	52	353	132	81	—	—	—	—	—	—	—	—	—	—
1950	36.9	615	200	415	360	55	381	149	85	—	—	—	—	—	—	—	—	—	—
1951	38.7	709	233	476	416	60	444	170	94	—	—	—	—	—	—	—	—	—	—
1952	39.4	785	260	525	460	65	491	193	101	—	—	—	—	—	—	—	—	—	—
1953	40.7	841	280	561	491	70	524	210	107	—	—	—	—	—	—	—	—	—	—
1954	39.8	876	308	568	498	70	540	225	110	—	—	—	—	—	—	—	—	—	—
1955	41.4	916	325	591	521	70	563	238	115	—	—	—	—	—	—	—	—	—	—
1956	43.0	1,002	350	652	577	75	618	259	125	—	—	—	—	—	—	—	—	—	—
1957	43.3	1,062	360	702	617	85	661	271	130	—	—	—	—	—	—	—	—	—	—
1958	42.5	1,112	375	737	647	90	694	285	132	—	—	—	—	—	—	—	—	—	—
1959	44.0	1,210	410	800	700	100	753	316	141	—	—	—	—	—	—	—	—	—	—

Note appears at end of table

(continued)

¹ Sharp jump between 1970 and 1973 is in large part the result of the introduction of the federal Black Lung Benefits program.

Sources

For series Bf511-521, 1939-1967, Alfred M. Skolnik and Daniel N. Price, "Another Look at Workmen's Compensation," *Social Security Bulletin* 33 (October 1970): 3-25; 1968-1991, U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement* (1994), Table 9.B1, p. 333; 1992-1993, Jack Schmulowitz, "Workers' Compensation: Coverage, Benefits, and Costs, 1992-93," *Social Security Bulletin* 58 (Summer 1995): 51-7. The Social Security Administration stopped collecting and publishing these data in 1995. The National Academy of Social Insurance (NASI) with the help of Jack Schmulowitz published updated information for 1994 and 1995 in National Academy of Social Insurance, "Workers' Compensation: Benefits, Coverage and Costs, 1994-1995 New Estimates." For series Bf512 and Bf517-519 for years 1987 through 1998 and for series Bf522-524, National Academy of Social Insurance, "Workers' Compensation: Benefits, Coverage and Costs, 1997-1998 New Estimates." The publication is available at the NASI Internet site. The NASI continues to publish annual updates.

Documentation

Workers' compensation programs provide medical and hospital care and income-maintenance protection to workers whose disabilities are the result of work-related injuries or illnesses. The programs also provide survivor benefits to the dependents of deceased workers whose deaths result from job-related accidents and/or occupational diseases. The first permanent workers' compensation law was established by the Federal Employer Liability Act in 1908, which provided limited benefits for certain federal employees engaged in hazardous work. Nine states had enacted their own workers' compensation laws by 1911, forty-one states by 1920, forty-four by 1930, forty-six prior to 1939, and all forty-eight by 1948. Alaska and Hawaii¹ each adopted workers' compensation in 1915 as territories, long before becoming states in 1959.

The figures include estimated payments under state worker's compensation laws (forty-six states in 1939; forty-eight states, 1948-1957; fifty states after Alaska and Hawaii¹ are included from 1959 to the present) and under federal workers' compensation laws covering employees of the federal government, private employees in the District of Columbia, and longshoremen and harbor workers. Beginning in 1970, the data include the federal Black Lung Benefits program for disabled coal miners and their dependents.

Most of the state workers' compensation laws exempt employment in agriculture, domestic service, and casual labor; about half exempt employers who have fewer than a specified number of employees. In the original laws, occupational diseases were not covered. The number of laws covering occupational diseases expanded. For the past fifty years nearly all states have made occupational diseases, or at least specified diseases, compensable.

To make certain that benefit payments will be made when due, the covered employer is required by law to obtain insurance from a private insurance carrier or from a state insurance fund or to give proof of his qualifications to carry his own risk, which is known as self-insurance.

There is substantial variation in the benefit payments across states. Detailed descriptions of the benefit rules are published annually by the U.S. Chamber of Commerce in *Analysis of Workers' Compensation Laws* and the U. S. Bureau of Labor Statistics in *Workers' Compensation Laws*.

Estimates of workers' compensation payments depend on a variety of sources of published information, supplemented by correspondence with state agencies. Data on payments by private insurance companies and some of the competitive state funds are obtained from annual issues of *Spectator: Insur-*

ance by States of Fire, Marine, Casualty, Surety and Miscellaneous Lines and from the A. M. Best Company. Data on payments made by the remaining state funds are obtained from annual or biennial reports issued by state workmen's compensation bureaus or divisions, or state insurance departments, and from the annual publication of the Bureau of the Census, *State Government Finances*. Data on payments by self-insurers in some states are obtained directly from state reports. For most states, however, estimates are calculated using one of several ratios (for example, reported accidents, claims filed, taxes paid) that exist between firms that are insured with private carriers or state funds and firms that self-insure. For more details on estimation procedures in the 1990s, see the publications by the NASI in the source listings.

Series Bf511. Estimates are monthly averages.

Series Bf512. The sum of series Bf513-514, although the sums during the 1990s may not match series Bf512 because published sources provide more recent updates for series Bf512 than for the subcategories. It is also the sum of series Bf517-519.

Series Bf512-519. After 1992, includes estimated benefits paid under deductible provisions. Provisions for payments of deductibles are a relatively new development of the 1990s, and data were not previously available.

Series Bf514. The sum of series Bf515-516.

Series Bf517. Net cash and medical benefits paid by private insurance companies under standard workers' compensation policies.

Series Bf518. Includes net cash and medical benefits paid by competitive and exclusive state funds and federal workers' compensation programs, and, starting in 1970, cash benefits paid by the federal Black Lung Benefits program. Data for fiscal years for some funds.

Series Bf519. Cash and medical benefits paid by self-insurers plus the value of medical benefits paid by employers carrying workers' compensation policies that exclude standard medical coverage. Estimated from available state data.

Series Bf520. Includes benefits paid by self-insurers with an additional 5-10 percent added to allow for administrative costs plus the premiums written by private carriers and state funds. Also includes benefits paid and administrative costs of federal system for government employees. According to Schmulowitz (1992, notes to Tables 5 and 6, p. 57), this includes the portion of the federal Black Lung Benefits program financed from employer contributions. This series equals the sum of benefits divided by the size of the covered payroll.

Series Bf521. Excludes programs financed from general revenue - most federal Black Lung Benefits programs and supplemental pensions in a few states. Through 1991, the sources give this figure directly. In updates for 1992-1995, this figure was calculated as benefits per \$1 of cost multiplied by cost per \$100 of payroll.

Series Bf522-524. These are estimates for coverage of workers and, consequently, employers' costs and benefits per \$100 of payroll based on the methods for estimating coverage used in the publications from the NASI. These are the estimates that will be updated in future years. For descriptions of the difference in the procedures for estimating these series, see the NASI publication for 1994-1995 in the source notes (pp. 9-13).

TABLE Bf525-534 Black Lung Benefits – recipients and payments: 1970-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Persons receiving benefits								Benefits paid by Social Security Administration	
	Claim filed prior to July 1, 1973				Claim filed after July 1, 1973				Monthly amount	Annual amount
	Total	Miners	Widows	Dependents	Total	Miners	Widows	Dependents		
	Bf525	Bf526	Bf527	Bf528	Bf529	Bf530	Bf531	Bf532	Bf533	Bf534
Number	Number	Number	Number	Number	Number	Number	Number	Thousand dollars	Thousand dollars	
1970	111,976	43,921	24,889	43,166	—	—	—	—	12,500	111,000
1971	231,729	77,213	67,358	87,158	—	—	—	—	27,200	378,900
1972	298,963	101,802	88,067	109,094	—	—	—	—	37,800	554,400
1973	461,491	159,837	124,154	177,500	—	—	—	—	63,700	1,045,200
1974	487,216	169,097	134,700	183,419	—	—	—	—	71,500	951,300
1975	482,311	165,405	139,407	177,499	—	—	—	—	75,500	947,700
1976	469,655	158,087	142,495	169,073	—	—	—	—	77,400	963,300
1977	457,399	148,720	144,543	164,136	—	—	—	—	80,500	942,200
1978	439,970	138,648	145,829	155,493	—	—	—	—	82,300	965,100
1979	418,948	129,558	146,527	142,863	83,887	30,739	19,366	33,177	86,500	983,100
1980	399,477	120,235	146,603	132,639	139,073	52,922	26,739	58,223	91,400	1,032,000
1981	376,505	111,249	146,173	119,083	163,401	62,787	30,517	68,266	91,700	1,081,300
1982	354,569	102,234	144,863	107,472	173,972	61,727	32,689	78,738	90,800	1,076,000
1983	333,358	93,694	142,967	96,697	166,043	64,181	35,178	65,871	86,300	1,055,800
1984	313,822	85,658	140,995	87,169	163,166	62,785	36,495	62,982	85,300	1,038,000
1985	294,846	77,836	138,328	78,682	160,437	60,906	37,827	60,817	83,700	1,025,000
1986	275,783	70,253	135,003	70,497	156,892	59,014	38,895	58,058	78,900	971,000
1987	258,988	63,573	131,561	63,854	153,769	57,095	40,346	55,345	76,800	940,000
1988	241,626	56,977	127,322	57,327	150,123	54,920	41,607	52,553	73,500	904,000
1989	225,764	51,048	123,220	51,496	145,289	52,258	42,691	49,245	72,000	882,000
1990	210,678	45,643	118,705	46,330	139,854	49,306	43,404	45,996	70,000	863,400
1991	196,419	40,703	114,046	41,670	134,205	46,450	43,831	42,745	68,400	844,400
1992	182,396	35,971	109,091	37,334	128,761	43,723	43,967	39,846	66,500	822,500
1993	168,365	31,664	103,334	33,367	123,213	40,866	44,103	36,964	64,100	794,300
1994	155,172	27,828	97,414	29,930	117,569	37,970	44,073	34,194	60,600	751,900
1995	143,011	24,573	91,517	26,921	111,769	35,220	43,688	31,499	56,100	696,700
1996	131,143	21,477	85,559	24,107	105,923	32,452	43,155	28,923	52,600	654,600
1997	119,233	18,488	79,238	21,507	100,352	29,839	42,468	26,601	49,255	614,888
1998	109,271	15,964	73,420	19,887	—	—	—	—	46,204	576,389

Sources

Series Bf525-528 and Bf533-534, *Social Security Bulletin: Annual Statistical Supplement* (1999), Table 9.D1, p. 338. Series Bf529-532, U.S. Department of Labor, *Office of Workers' Compensation Programs Annual Report to Congress, FY 1996*.

Documentation

Established by the federal Coal Mine Health and Safety Act of 1969, the Black Lung Benefits program provides monthly benefit payments to coal miners who are totally disabled as a result of pneumoconiosis, to the widows of coal miners who died as a result of pneumoconiosis, and to their dependents. Until October 1, 1997, the Social Security Administration has been responsible for the payment and administration of benefits with respect to Part B claims filed through June 30, 1973 (and for certain survivor cases before December 31, 1973). As a result, series Bf525-528 and Bf533-534 reflect payments made to beneficiaries resulting from Part B claims made prior to July 1, 1973. These payments are financed from the general funds of the Treasury.

Under the Black Lung Benefits Act of 1972, the U.S. Department of Labor (DOL) has jurisdiction over Part C claims (generally claims arising July 1, 1973, and later). Different financing provisions are applicable to these claims. Data on claims filed with the DOL are included in series Bf529-532.

Under the law, the basic Black Lung Benefits rate is 37.5 percent of the monthly pay rate for federal employees in the first step of grade GS-2. The basic rate to a miner or widow may be increased according to the number of qualified dependents: 50 percent of the basic benefit rate if one dependent qualifies, 75 percent for two dependents, and 100 percent for three or more dependents. Because Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased. If a miner or surviving spouse is receiving workers' compensation, unemployment compensation, or Disability Insurance payment under state law, the Black Lung benefit is offset by the amount being paid under these other programs.

All coal mine operators are required to pay an excise tax, based on their tonnage and price of coal sold, to support payment of benefits to miners under the Act and to pay for the cost of administering the Act. In addition, coal mine operators are required, either directly or through insurance, to provide for the payment of benefits to miners when they are the responsible employer of the miners. Benefits for recipients who worked in mines before 1970, for whom an employer cannot be designated responsible, or for whom the employer defaults on payments are paid from a trust fund funded by taxes on coal production.

TABLE Bf535-544 Medicare cost sharing and premium amounts: 1966-1999¹

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Hospital Insurance					Supplementary Medical Insurance				
	Deductible and copayment					Monthly premium				
	Inpatient hospital deductible (IHD) first 60 days	Inpatient hospital daily copayment		Skilled-nursing facility daily copayment after 20 days	Monthly premium for voluntary purchase by persons not covered by the HI program	Annual deductible	Coinsurance rate	Government contribution to monthly premium		
		Days 61-90	Lifetime reserve days after 90 days					Monthly premium for aged and disabled enrollees	Aged enrollees	Disabled enrollees
Bf535	Bf536	Bf537	Bf538	Bf539	Bf540	Bf541	Bf542	Bf543	Bf544	
Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Percent	Dollars	Dollars	Dollars	
1966	40	10	—	—	—	50	20	3.0	3.0	—
1967	40	10	—	5.00	—	50	20	3.0	3.0	—
1968	40	10	20	5.00	—	50	20	4.0	4.0	—
1969	44	11	22	5.50	—	50	20	4.0	4.0	—
1970	52	13	26	6.50	—	50	20	5.3	5.3	—
1971	60	15	30	7.50	—	50	20	5.6	5.6	—
1972	68	17	34	8.50	—	50	20	5.8	5.8	—
1973	72	18	36	9.00	33	60	20	6.3	6.3	22.7
1974	84	21	42	10.50	36	60	20	6.7	6.7	29.3
1975	92	23	46	11.50	40	60	20	6.7	8.3	30.3
1976	104	26	52	13.00	45	60	20	7.2	14.2	30.8
1977	124	31	62	15.50	54	60	20	7.7	16.9	42.3
1978	144	36	72	18.00	63	60	20	8.2	18.6	41.8
1979	160	40	80	20.00	69	60	20	8.7	18.1	41.3
1980	180	45	90	22.50	78	60	20	9.6	23.0	41.4
1981	204	51	102	25.50	89	60	20	11.0	34.2	62.2
1982	260	65	130	32.50	113	75	20	12.2	37.0	72.0
1983	304	76	152	38.00	113	75	20	12.2	41.8	80.0
1984	356	89	178	44.50	155	75	20	14.6	43.8	94.0
1985	400	100	200	50.00	174	75	20	15.5	46.5	89.9
1986	492	123	246	61.50	214	75	20	15.5	46.5	66.1
1987	520	130	260	65.00	226	75	20	17.9	53.7	88.1
1988	540	135	270	67.50	234	75	20	24.8	74.4	72.4
1989 ²	560	—	—	25.25	156	75	20	31.9	83.7	40.7
1990	592	148	296	74.00	175	75	20	28.6	85.4	59.2
1991	628	157	314	78.50	177	100	20	29.9	95.3	82.1
1992	652	163	326	81.50	192	100	20	31.8	89.8	129.8
1993	676	169	338	84.50	221	100	20	36.6	104.4	129.2
1994	696	174	348	87.00	245	100	20	41.1	82.5	111.1
1995	716	179	358	89.50	261	100	20	46.1	100.1	165.5
1996	736	184	368	92.00	289	100	20	42.5	127.3	167.7
1997	760	190	380	95.00	311	100	20	43.8	131.4	177.0
1998	764	191	382	95.50	309	100	20	43.8	132.0	150.4
1999	768	192	384	96.00	309	100	20	45.5	139.1	160.5

¹ Information in the table based on rules beginning in July, through 1983, and in January thereafter.

² Program changes in this year produce irregularities in some series. See text.

Source

Social Security Bulletin: Annual Statistical Supplement (1999), Table 2.C.1, p. 106.

Documentation

Medicare was established as part of the Social Security Amendments of 1965 as a health insurance program for the aged that complemented retirement, survivors, and disability benefits under Title II of the Social Security Act. It consists of two separate but coordinated programs: Part A (Hospital Insurance, or HI) and Part B (Supplementary Medical Insurance, or SMI).

For a full, detailed summary of Medicare and a history of its provisions, consult the *Social Security Bulletin: Annual Statistical Supplement*, 1997.

These series do not reflect Medicare changes in The Balanced Budget Act of 1997, enacted August 5 (Public Law 105-33).

HI provides beneficiaries with four kinds of care: (1) inpatient hospital care, (2) inpatient care in a skilled-nursing facility, (3) home health care, and (4) hospice care. As of January 1, 1996, once a Medicare beneficiary has paid

the inpatient hospital deductible (IHD), series Bf535, all remaining hospital costs for the first sixty days in a benefit period are paid by Medicare. From the sixty-first day through the ninetieth day in a benefit period, the patient pays a daily coinsurance amount, series Bf536, equal to one fourth the amount of the inpatient hospital deductible. Further, since 1968, each HI beneficiary has a "lifetime reserve" of sixty days that may be used when the covered days within a benefit period have been exhausted. Lifetime reserve days may be used only once, and the patient must pay one half the inpatient hospital deductible as the daily coinsurance amount, series Bf537. Since 1967, the HI program has provided the opportunity for care in a skilled-nursing facility. After twenty days, the patient pays a coinsurance payment per day of one eighth of the IHD, series Bf538.

Some special changes in 1989 led to certain odd figures in that year. After the IHD for the first sixty days, series Bf535, had been paid by the beneficiary, Medicare paid the balance of expenses for covered hospital services, regardless of the number of days of hospitalization; hence, no values are included in series Bf536-537. Also, the beneficiary paid a coinsurance rate equal to 20 percent of the estimated average daily cost of covered skilled-nursing facility care for the first eight days of care.

(continued)

TABLE Bf535-544 Medicare cost sharing and premium amounts: 1966-1999 *Continued*

Individuals who are eligible for Social Security or Railroad Retirement benefits are eligible for premium-free HI when they reach age 65. Workers and their spouses with a sufficient period of Medicare-only coverage in federal, state, or local government employment are also eligible at age 65. HI is also provided to disabled beneficiaries who have been entitled to Social Security or Railroad Retirement disability benefits for at least twenty-four months, and government employees with Medicare-only coverage who have been disabled for more than twenty-nine months. Insured workers and their spouses and children who have end-stage renal disease and who require kidney dialysis or a kidney transplant are eligible regardless of age.

Since July 1973, most persons age 65 or older and otherwise ineligible for HI have been permitted to enroll voluntarily and pay the monthly premium for HI if they also enroll in SMI. Beginning in 1993, Omnibus Budget Reconciliation legislation stipulated that individuals and their spouses with at least thirty quarters of Social Security coverage were eligible for a reduced premium over the period 1994-1997. The reduced premiums for each year in this period were \$184, \$183, \$188, and \$187, respectively.

Financing for the HI program is provided through a tax on earnings that is separate from the tax used to finance Old-Age, Survivors, and Disability Insurance (OASDI) benefits. Prior to January 1991, the OASDI and HI taxes were applied to the same maximum earnings base. Since that time, the earnings base for HI has increased; the Omnibus Budget Reconciliation Act of 1993 repealed the dollar limit and wages and self-employment income subject to HI taxes. The HI contribution rate of 1.45 percent applies equally to employers and employees, and the rate for the self-employed equals the combined rate of 2.9 percent. Income from contributions is channeled into the federal HI trust fund, from which HI benefits and administrative costs are paid. After 1977, the Health Care Financing Administration (HCFA) assumed responsibility for administering the program from the Social Security Administration.

The SMI program covers medically necessary services and supplies such as the following: (1) physician's, surgeon's, and some Medicare-approved practitioners' services; (2) services in an emergency room or outpatient clinic; (3) laboratory tests, X-rays, and other radiology services; (4) mental health care in a partial hospitalization psychiatric program; (5) ambulatory surgical center services; (6) physical and occupational therapy, and speech pathology services; (7) comprehensive outpatient rehabilitation facility services, and certain treatments of a mental illness; (8) radiation therapy, renal (kidney) dialysis and transplants, and heart and liver transplant under certain

limited conditions; (9) approved durable medical equipment for home use; and (10) certain drugs and biologicals.

Cost-sharing contributions are required for participants in SMI. Beneficiaries must pay the following: an annual deductible, series Bf540; coinsurance payments as a percentage of the bill, series Bf541; charges above the Medicare allowed charge; and charges for services that are not covered by Medicare. Noncovered services include routine physical examinations, long-term nursing care, and certain other health care needs such as eyeglasses. In addition, the insured pays a monthly premium, series Bf542. The government then pays a supplemental premium for the aged and, since July 1973, for the disabled, series Bf543-544.

Except for aliens, all persons age 65 and older and all disabled persons entitled to coverage under HI are eligible to enroll in the SMI program on a voluntary basis by paying a monthly premium. Premiums are channeled into the federal SMI trust fund, and the program is administered by HCFA.

Series Bf540-541. Beginning in April 1968, professional inpatient services of pathologists and radiologists were not subject to either a deductible or coinsurance for SMI. However, after 1980, the pathologists' and radiologists' services were not subject to a deductible or coinsurance only as long as the physician accepted assignment (agreed to accept Medicare's determination of "reasonable charges" as the full fee for the service). Effective in October 1982, these services once again became subject to coinsurance. In 1973 only, home health services were not subject to coinsurance under SMI. In 1981 only, home health services were not subject to a deductible.

Series Bf542. In 1973, the monthly premium for SMI for the enrollee was reduced temporarily to \$5.80 in July and \$6.10 in August by the Cost of Living Council. For 1989, the monthly premium reported in the table includes the standard monthly SMI premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. The amount shown is for most Part B enrollees. Residents of Puerto Rico and other territories and commonwealths, as well as other persons enrolled in Part B only, paid different supplemental flat premiums, so that the amount shown in the table is larger than the amount paid by these individuals. The Omnibus Budget Reconciliation Act of 1989 revised the methodology for determining the 1990 SMI premium for enrollees. Before the revision, the rate would have been \$29.

Series Bf542-543. The monthly premium for SMI for both the enrollee and the government did not change to \$4 until April 1968.

TABLE Bf545-557 Medicare trust fund for hospital insurance – receipts, expenditures, and assets: 1966-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Receipts								Expenditures				
	Total	Payroll taxes	Income from taxation of benefits	Railroad retirement account transfers	Reimbursements from general revenues				Total	Benefit payment	Administrative expenses		Trust fund assets at year-end
					Uninsured persons	Military wage credits	Premium receipts from voluntary enrollees	Interest on investments and other income			Total	As a percentage of benefit payments	
	Bf545	Bf546	Bf547	Bf548	Bf549	Bf550	Bf551	Bf552	Bf553	Bf554	Bf555	Bf556	Bf557
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1966	1,943	1,858	—	16	26	11	—	32	999	891	108	12.1	944
1967	3,559	3,152	—	44	301	11	—	51	3,430	3,353	77	2.3	1,073
1968	5,287	4,116	—	54	1,022	22	—	74	4,277	4,179	99	2.4	2,083
1969	5,279	4,473	—	64	617	11	—	113	4,857	4,739	118	2.5	2,505
1970	5,979	4,881	—	66	863	11	—	158	5,281	5,124	157	3.1	3,202
1971	5,732	4,921	—	66	503	48	—	193	5,900	5,751	150	2.6	3,034
1972	6,403	5,731	—	63	381	48	—	180	6,503	6,318	185	2.9	2,935
1973	10,821	9,944	—	99	451	48	2	278	7,289	7,057	232	3.3	6,467
1974	12,024	10,844	—	132	471	48	5	523	9,372	9,099	272	3.0	9,119
1975	12,980	11,502	—	138	621	48	7	664	11,581	11,315	266	2.4	10,517
1976	13,766	12,727	—	143	—	141	9	746	13,679	13,340	339	2.5	10,605
1977	15,856	14,114	—	—	803	143	12	784	16,019	15,737	283	1.8	10,442
1978	19,213	17,324	—	214	688	141	13	834	18,178	17,682	496	2.8	11,477
1979	22,825	20,768	—	191	734	141	16	975	21,073	20,623	450	2.2	13,228
1980	26,097	23,848	—	244	697	141	18	1,149	25,577	25,064	512	2.0	13,749
1981	35,725	32,959	—	276	659	207	22	1,603	30,726	30,342	384	1.3	18,748
1982	37,998	34,586	—	351	808	207	24	2,022	36,144	35,631	513	1.4	8,164
1983	44,570	37,259	—	358	878	3,456	27	2,593	39,877	39,337	540	1.4	12,858
1984	46,720	42,288	—	351	752	250	33	3,046	43,887	43,257	629	1.5	15,691
1985	51,397	47,576	—	371	766	-719	41	3,362	48,414	47,580	834	1.8	20,499
1986	59,267	54,583	—	364	566	91	43	3,619	50,422	49,758	664	1.3	39,957
1987	64,064	58,648	—	368	447	94	38	4,469	50,289	49,496	793	1.6	53,732
1988	69,239	62,449	—	364	475	80	41	5,830	53,331	52,517	815	1.6	69,640
1989	76,721	68,369	—	379	515	86	55	7,317	60,803	60,011	792	1.3	85,558
1990	80,372	72,013	—	367	413	-993	122	8,451	66,997	66,239	758	1.1	98,933
1991	88,839	77,851	—	352	605	89	432	9,510	72,570	71,549	1,021	1.4	115,202
1992	93,836	81,745	—	374	621	86	522	10,487	85,015	83,895	1,121	1.3	124,022
1993	98,187	84,133	—	400	367	81	675	12,531	94,391	93,487	904	1.0	127,818
1994	109,570	95,280	1,639	413	506	80	907	10,745	104,545	103,282	1,263	1.2	132,844
1995	115,027	98,421	3,913	396	462	61	954	10,820	117,604	116,368	1,236	1.1	130,267
1996	124,603	110,585	4,069	401	419	-2,293	1,199	10,222	129,929	128,632	1,297	1.0	124,942
1997	130,154	114,670	3,558	419	481	70	1,319	9,637	139,452	137,762	1,690	1.2	115,643
1998	140,547	124,317	5,067	419	34	67	1,316	9,327	135,771	133,990	1,782	1.3	120,419

Source

Social Security Bulletin, Annual Statistical Supplement (1999), Table 8.A.1, p. 311. The original source of the series is the 1996 Annual Report of the Board of Trustees of the federal Hospital Insurance (HI) trust fund, Table II.D2.

Documentation

This table provides information on the Medicare trust fund for HI. The trust fund reports data on receipts from payroll taxes, premiums of voluntary enrollees, transfers from Railroad Retirement accounts, and reimbursements from general revenues for uninsured persons and military wage credits. The table also provides information on expenditures for benefit payments and administrative expenses. For more detailed information on the Medicare program itself, see the text for Table Bf535-544.

Series Bf548-549. For series Bf548, no transfer occurred in 1977 because of the change in transfer dates from August to June. The 1978 transfer reflects benefits and administrative costs from July 1977 to September 1978. Similarly, for series Bf549, no transfer occurred in 1976 because of the change in transfer dates from December to March. The 1977 transfer reflects benefits and administrative expenses from July 1976 to September 1977.

Series Bf550. In 1977, includes \$2 million in reimbursements from general revenues for costs arising from the granting of deemed wage credits to persons of Japanese ancestry who were interned during World War II. The data

reported for 1938 reflect the lump-sum general revenue transfer, as provided for in section 151 of Public Law 98-21. Amounts in 1985, 1990, and 1996 include a lump-sum general revenue transfer as provided for in section 151 of Public Law 98-21. The amounts transferred were -\$805 million, -\$1,100 million, and -\$2,366 million, respectively.

Series Bf552. Includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund, as well as a small amount of miscellaneous income. In 1993, includes \$1,805 million transferred from Supplementary Medical Insurance (SMI) Catastrophic Coverage Reserve Fund as provided for by Public Law 102-394.

Series Bf554. Amounts reported as benefit payments include the costs of Peer Review Organizations, beginning with the implementation of the Prospective Payment System on October 1, 1983. In 1998, includes monies transferred from the SMI trust fund for home health agency costs, as provided for by Public Law 105-33.

Series Bf555. Data on administrative expenses include the costs of experimental and demonstration projects.

Series Bf557. In 1982, total assets reported exclude \$12,437 million loaned to the Old-Age, Survivors Insurance trust fund. Repayments of \$1,824 million and \$10,613 million occurred in 1985 and 1986, respectively. Amounts reported in those years reflect the repayments.

TABLE Bf558–567 Medicare trust fund for Supplementary Medical Insurance – receipts, expenditures, and assets: 1966–1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Receipts						Expenditures			Trust fund assets at year-end
	Premiums from participants						Total	Benefit payments	Administrative expenses	
	Total	Total	Aged premiums	Disabled premiums	Government contributions	Interest and other income				
	Bf558	Bf559	Bf560	Bf561	Bf562	Bf563				
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1966	324	322	322	—	0	2	203	128	75	122
1967	1,597	640	640	—	933	24	1,307	1,197	110	412
1968	1,711	832	832	—	858	21	1,702	1,518	184	421
1969	1,839	914	914	—	907	18	2,061	1,865	196	199
1970	2,201	1,096	1,096	—	1,093	12	2,212	1,975	237	188
1971	2,639	1,302	1,302	—	1,313	24	2,377	2,117	260	450
1972	2,808	1,382	1,382	—	1,389	37	2,614	2,325	289	643
1973	3,312	1,550	1,491	59	1,705	57	2,844	2,526	318	1,111
1974	4,124	1,804	1,664	140	2,225	95	3,728	3,318	410	1,506
1975	4,673	1,918	1,759	158	2,648	107	4,735	4,273	462	1,444
1976	5,977	2,060	1,878	183	3,810	107	5,622	5,080	542	1,799
1977	7,805	2,247	2,030	217	5,386	172	6,505	6,038	467	3,099
1978	9,056	2,470	2,221	248	6,287	299	7,755	7,252	503	4,400
1979	9,768	2,719	2,451	267	6,645	404	9,265	8,708	557	4,902
1980	10,874	3,011	2,707	304	7,455	408	11,245	10,635	610	4,530
1981	15,374	3,722	3,356	366	11,291	361	14,028	13,113	915	5,877
1982	16,580	3,697	3,341	356	12,284	599	16,227	15,455	772	6,230
1983	19,824	4,236	3,845	391	14,861	727	18,984	18,106	878	7,070
1984	23,180	5,167	4,721	445	17,054	959	20,552	19,661	891	9,698
1985	25,106	5,613	5,105	508	18,250	1,243	23,880	22,947	933	10,924
1986	24,665	5,722	5,218	504	17,802	1,141	27,299	26,239	1,060	8,291
1987	31,844	7,409	6,747	661	23,560	875	31,740	30,820	920	8,394
1988	35,825	8,761	7,983	778	26,203	861	35,230	33,970	1,260	8,990
1989	44,349	12,263	9,793	993	30,852	1,234	39,783	38,294	1,489	13,556
1990	45,913	11,320	10,311	1,008	33,035	1,558	43,987	42,468	1,519	15,482
1991	51,224	11,934	10,846	1,088	37,602	1,688	48,877	47,336	1,541	17,828
1992	57,237	14,077	12,814	1,263	41,359	1,801	50,830	49,260	1,570	24,235
1993	57,679	14,193	12,731	1,462	41,465	2,021	57,784	55,784	2,000	24,131
1994	55,607	17,386	15,569	1,817	36,203	2,018	60,317	58,618	1,699	19,422
1995	60,306	19,717	17,651	2,066	39,007	1,582	66,599	64,972	1,627	13,130
1996	85,609	18,763	16,654	2,109	65,035	1,811	70,408	68,598	1,810	28,332
1997	81,924	19,289	17,079	2,210	60,171	2,464	74,124	72,757	1,368	36,131
1998	87,711	20,933	18,594	2,338	64,068	2,711	77,630	76,125	1,505	46,212

Source

Social Security Bulletin: Annual Statistical Supplement (1999), Table 8.A2, p. 312. The original source for the series is the *1999 Annual Report of the Board of Trustees of the Federal Supplementary Insurance Trust Fund*, Table II.D2, and unpublished Treasury reports.

Documentation

For more detailed information on Medicare, consult the text for Table Bf535–544.

This table provides information on the Medicare trust fund for Supplementary Medical Insurance (SMI). The trust fund reports data on receipts from participant premiums, government contributions, and interest and other income. The table also provides information on expenditures for benefit payments and administrative expenses.

Series Bf558, Bf563–564, and Bf566–567. Data for 1989 include the impact of the Medicare Catastrophic Coverage Act of 1988.

Series Bf559. The receipts from premiums from participants in 1989 include catastrophic coverage premiums of \$1.5 billion that were not distributed between aged and disabled enrollees.

Series Bf559–562. Section 708 of Title VII of the Social Security Act modified the provisions for the delivery of Social Security benefit checks when the

regularly designated delivery day falls on a Saturday, Sunday, or legal public holiday. Delivery of benefit checks normally due in January 1982 occurred on December 31, 1981. The SMI premiums withheld from the checks (\$264 million) and the general revenue matching contributions (\$883 million) are thus included in 1981 premium income and general revenue income and are not included in the 1982 data. Similarly, delivery of benefit checks normally due in January 1988 occurred on December 31, 1987. The SMI premiums withheld from the checks (\$692 million) and the general revenue matching contributions (\$2,178 million) are thus included in 1987 premium income and general revenue income and are not included in the 1988 data. Delivery of benefit checks normally due in January 1993 occurred on December 31, 1992. The SMI premiums withheld from the checks (\$1,089 million) and the general revenue matching contributions (\$3,175 million) are thus included in 1992 premium income and general revenue income and are not included in the 1993 data. Delivery of benefit checks normally due in January 1999 occurred on December 31, 1998. The SMI premiums withheld from the checks (\$1,512 million) and the general revenue matching contributions (\$4,711 million) are thus added to the SMI trust fund on December 31, 1998. These amounts are excluded from the premium income and general revenue income for 1999.

Series Bf562. Government contributions include certain interest-adjustment items.

**TABLE Bf558-567 Medicare trust fund for Supplementary Medical Insurance – receipts, expenditures, and assets:
1966-1998 *Continued***

Series Bf563. Interest and other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund, and other miscellaneous income. The data reported under trust fund year-end assets depends on the total net assets as well as the liabilities of the program. In 1989, the total premiums received include \$1.5 billion as catastrophic coverage premiums that are not distributed between aged and disabled enrollees.

Series Bf565. Includes the impact of the transfer to the Hospital Insurance (HI) trust fund of the SMI reserve fund on March 31, 1993, as specified in Public Law 102-394. Actual benefit payments for fiscal year 1993 are \$53,979 million; the amount transferred was \$1,805 million. In 1998, the benefit payments are less monies transferred from the HI trust fund for home health agency costs, as provided by the Balanced Budget Act of 1997.

TABLE Bf568-581 Medicaid recipients and vendor payments, by eligibility category: 1972-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Fiscal year	Recipients										Vendor payments															
	Age 65 or older					Blind					Total															
	Thousand	Bf569	Thousand	Bf570	Thousand	Bf571	Thousand	Bf572	Thousand	Bf573	Thousand	Bf574	Thousand	Million dollars	Bf575	Million dollars	Bf576	Million dollars	Bf577	Million dollars	Bf578	Million dollars	Bf579	Million dollars	Bf580	Million dollars
1972	17,606	3,318	108	1,625	7,841	3,137	1,576	6,300	1,925	45	1,354	1,139	962	875												
1973	19,622	3,496	101	1,804	8,659	4,066	1,495	8,639	3,235	65	2,015	1,426	1,446	452												
1974	21,462	3,732	135	2,222	9,478	4,392	1,502	9,983	3,691	80	2,388	1,694	1,704	425												
1975	22,007	3,615	109	2,355	9,598	4,529	1,800	12,242	4,358	93	3,052	2,186	2,062	492												
1976	22,815	3,612	97	2,572	9,924	4,774	1,836	14,091	4,910	96	3,824	2,431	2,288	542												
1977	22,831	3,636	92	2,710	9,651	4,785	1,959	16,239	5,499	116	4,767	2,610	2,606	641												
1978	21,965	3,376	82	2,636	9,376	4,643	1,852	17,992	6,308	116	5,505	2,748	2,673	643												
1979	21,520	3,364	79	2,674	9,106	4,570	1,727	20,472	7,046	124	6,774	2,884	3,021	638												
1980	21,605	3,440	92	2,819	9,333	4,877	1,499	23,311	8,739	124	7,497	3,123	3,231	596												
1981	21,890	3,367	86	2,993	9,581	5,187	1,364	27,204	9,926	154	9,301	3,508	3,763	552												
1982	21,603	3,240	84	2,806	9,563	5,356	1,434	29,399	10,739	172	10,233	3,473	4,093	689												
1983	21,554	3,371	77	2,844	9,535	5,592	1,129	32,391	11,954	183	11,184	3,836	4,487	747												
1984	21,607	3,238	79	2,834	9,634	5,600	1,187	33,891	12,815	219	11,758	3,979	4,420	700												
1985	21,814	3,061	80	2,937	9,757	5,518	1,214	37,508	14,096	249	13,203	4,414	4,746	798												
1986	22,515	3,140	82	3,100	10,029	5,647	1,362	41,005	15,097	277	14,635	5,135	4,880	980												
1987	23,109	3,224	85	3,296	10,168	5,599	1,418	45,050	16,037	309	16,507	5,508	5,592	1,078												
1988	22,907	3,159	86	3,401	10,037	5,503	1,343	48,710	17,135	344	18,250	5,848	5,883	1,198												
1989	23,511	3,132	95	3,496	10,318	5,717	1,175	54,500	18,558	409	20,476	6,892	6,897	1,268												
1990	25,255	3,202	83	3,635	11,220	6,010	1,105	64,859	21,508	434	23,969	9,100	8,590	1,257												
1991	28,280	3,359	85	3,983	13,415	6,778	658	77,048	25,453	475	27,798	11,690	10,439	1,193												
1992	30,926	3,742	84	4,378	15,104	6,954	664	90,814	29,078	530	33,326	14,491	12,185	1,204												
1993	33,432	3,863	84	4,932	16,285	7,505	763	101,709	31,554	589	38,065	16,504	13,605	1,391												
1994	35,053	4,035	87	5,372	17,194	7,586	779	108,270	33,618	644	41,654	17,302	13,585	1,467												
1995	36,282	4,119	92	5,767	17,164	7,604	1,537	120,141	36,527	848	48,570	17,976	13,511	2,708												
1996	36,118	4,285	95	6,126	16,739	7,127	1,746	121,685	36,947	869	51,196	17,544	12,275	2,746												
1997	34,872	3,955	—	6,129	15,266	6,803	2,719	124,430	37,721	—	54,130	15,658	12,307	4,612												

Sources

For 1972, 1975, 1980, 1985-1996, *Social Security Bulletin, Annual Statistical Supplement* (1999), Table 8.E2, p. 329. For 1973-1974, 1976-1979, *Social Security Bulletin, Annual Statistical Supplement* (1988), Tables 7.E2 and 7.F2, pp. 300-2.

Documentation

Medicaid was established under Title XIX of the Social Security Act in 1965. It established a federal-state matching entitlement program that provides medical assistance for certain individuals and families with low incomes and resources. The program is a jointly funded, cooperative venture between the federal and state governments. Each state establishes its own eligibility standards, range of services, rates of payment, and administration. Consequently, the Medicaid programs vary considerably across states and within states over time. The preceding categories give a general indication of the types of people eligible for Medicare - individuals who qualify for Supplemental Security Income, Aid to Families with Dependent Children (now Temporary Assistance for Needy Families), children younger than 6 and pregnant women whose family incomes are near the poverty line, some Medicare participants, and a series of other needy individuals. More detail on the program can be found in *Social Security Bulletin, Annual Statistical Supplement* (1997), pp. 108-13, or at the Internet site for the Health-Care Financing Administration. Figures are the unduplicated number of recipients and total vendor payments. Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year.

TABLE Bf582–590 Public assistance – vendor payments for medical care, by program: 1951–1975

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Total								
	Amount	As percentage of total public assistance payments	Title XIX (Medicaid)	For the aged under Title I	Old-Age Assistance	Aid to the Blind	Aid to the Permanently and Totally Disabled	Aid to Families with Dependent Children	General assistance
	Thousand dollars	Percent	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars
1951	103,179	4.3	—	—	41,728	1,196	3,445	10,413	46,397
1952	139,539	5.7	—	—	64,520	1,888	9,187	12,839	51,105
1953	165,721	6.5	—	—	83,395	2,351	13,591	15,069	51,315
1954	190,851	7.2	—	—	92,676	2,545	17,124	16,772	61,733
1955	231,544	8.4	—	—	117,748	3,170	21,302	21,197	68,127
1956	268,866	9.4	—	—	141,918	3,892	26,062	24,833	72,161
1957	302,143	9.8	—	—	158,799	4,642	27,722	33,332	77,648
1958	357,758	10.4	—	—	176,827	5,688	31,342	51,114	92,786
1959	456,944	12.5	—	—	254,389	6,846	41,268	58,143	96,298
1960	522,228	13.8	—	5,348	295,743	7,950	50,110	61,093	101,983
1961	688,320	16.8	—	113,387	316,479	8,513	60,294	79,384	110,262
1962	924,978	20.8	—	250,830	388,434	9,854	77,409	96,336	102,115
1963	1,064,664	22.6	—	329,391	412,906	10,895	97,698	110,569	103,206
1964	1,255,131	24.7	—	444,970	432,237	11,577	117,692	137,832	110,823
1965	1,480,119	27.0	—	585,501	452,289	12,255	144,165	164,845	121,063
1966	2,007,626	31.8	1,193,768	293,442	277,766	5,623	78,485	74,059	84,484
1967	2,872,696	36.8	2,510,531	63,916	160,627	2,996	38,309	30,210	66,106
1968	4,096,133	41.9	3,783,095	65,267	105,294	2,698	36,598	27,193	75,989
1969	4,681,110	40.5	4,360,445	58,873	103,566	2,702	40,311	31,317	83,311
1970	5,605,610	38.7	5,506,940	—	—	—	—	—	98,670
1971	6,953,129	39.0	6,842,098	—	—	—	—	—	111,031
1972	8,804,716	44.0	8,707,524	—	—	—	—	—	97,192
1973	9,919,266	46.4	9,806,853	—	—	—	—	—	112,413
1974	11,782,345	57.0	11,476,418	—	—	—	—	—	305,927
1975	14,555,229	57.9	14,177,418	—	—	—	—	—	377,811

Source

Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1975), p. 187.

Documentation

The series here show the precursors of Medicaid in federal government provision of medical assistance. Beginning October 1, 1950, under the 1950 amendments, federal participation in vendor payments for medical care became possible in the assistance to old-age, blind, disabled, and families with dependent children programs. The federal government was not involved in medical assistance under the General Assistance programs, which were financed entirely from state and local funds. Medical assistance for the aged

under Title I of the Social Security Act, series Bf585, was initiated in October 1960 under the 1960 amendments. Medicaid medical assistance under Title XIX of the Social Security Act, series Bf584, was initiated January 1966 under the 1965 amendments. Beginning in January 1970, medical assistance replaced the original medical assistance for the aged program under Title I and the medical vendor payments under Old-Age Assistance, Aid to the Blind, Aid to the Permanently and Totally Disabled, and Aid to Families with Dependent Children.

Series Bf584. Beginning in 1972, Medicaid spending under Title XIX includes payments for institutional services in intermediate care facilities.

Series Bf590. Complete data are not available.

TABLE Bf591–598 Supplemental Security Income program – persons receiving payments from federal or state governments: 1974–1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Total	Federal, or federally administered state supplementation	Federal only, or federal with state supplementation	State supplementation				
				Total	Federally administered		State administered	
					Total	Only	Total	Only
1974	4,027,572	3,996,064	—	—	—	—	300,724	31,508
1975	4,359,625	4,314,275	3,893,419	1,987,409	1,684,018	420,856	303,391	45,350
1976	4,285,785	4,235,939	3,799,069	1,912,550	1,638,173	436,870	274,377	49,846
1977	4,287,299	4,237,692	3,777,856	1,927,340	1,657,645	459,836	269,695	49,607
1978	4,265,473	4,216,925	3,754,663	1,946,921	1,681,403	462,262	265,518	48,548
1979	4,202,727	4,149,575	3,687,119	1,941,572	1,684,283	462,456	257,289	53,152
1980	4,194,100	4,142,017	3,682,411	1,934,239	1,684,765	459,606	249,474	52,083
1981	4,067,421	4,018,875	3,590,103	1,874,844	1,625,279	428,772	249,565	48,546
1982	3,908,466	3,857,590	3,473,301	1,798,400	1,550,405	384,289	247,995	50,876
1983	3,955,767	3,901,497	3,589,521	1,811,614	1,557,714	311,976	253,900	54,270
1984	4,093,956	4,029,333	3,698,758	1,875,187	1,607,234	330,575	267,953	64,623
1985	4,200,177	4,138,021	3,799,092	1,915,503	1,660,847	338,929	254,656	62,156
1986	4,346,652	4,269,184	3,921,661	2,002,746	1,723,401	347,523	279,345	77,468
1987	4,457,847	4,384,999	4,019,297	2,078,503	1,806,847	365,702	271,656	72,848
1988	4,541,441	4,463,869	4,088,988	2,154,759	1,884,675	374,881	270,084	77,572
1989	4,672,577	4,593,059	4,206,390	2,224,122	1,949,585	386,669	274,537	79,518
1990	4,888,180	4,817,127	4,412,131	2,343,803	2,058,273	404,996	285,530	71,053
1991	5,199,539	5,118,470	4,729,639	2,512,220	2,204,329	388,831	307,891	81,069
1992	5,646,877	5,566,189	5,202,249	2,684,371	2,371,564	363,940	312,807	80,688
1993	6,064,502	5,984,330	5,635,995	2,849,887	2,536,349	348,335	313,538	80,172
1994	6,377,111	6,295,786	5,965,130	2,950,470	2,628,431	330,658	322,039	81,325
1995	6,515,753	6,514,134	6,194,493	2,817,408	2,517,805	319,641	299,603	61,619
1996	6,676,729	6,613,718	6,325,531	2,731,681	2,421,470	288,187	310,211	63,011
1997	6,564,613	6,494,985	6,211,867	3,029,449	2,372,479	283,118	656,970	69,628
1998	6,649,465	6,566,069	6,289,070	3,072,392	2,411,707	276,999	660,685	83,396

Sources

U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Table 7.A3, p. 287. Annual data from earlier years are from *Social Security Bulletin: Annual Statistical Supplement* (1983) and *Social Security Bulletin: Annual Statistical Supplement* (1988).

Documentation

The Supplemental Security Income (SSI) program was implemented in 1974 and superseded the former programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled, except in the U.S. territories of Puerto Rico, Guam, and the Virgin Islands. SSI provides income support to persons age 65 and older, and blind or disabled adults and children. The federal payment is based on the individual's countable income, although not all income is counted against the federal SSI benefit level. States have the option to supplement the SSI floor and are required to supplement the federal benefit rate under certain circumstances.

A detailed legislative history and program summary is available in the *Social Security Bulletin: Annual Statistical Supplement* (1997).

Data are reported in December of every year. In 1974, data were unavailable for some series in December, but were reported in January. These series are listed in the *Social Security Bulletin Annual Statistical Supplement* (1997), pp. 287–90.

Administration of SSI Payments

The administration of SSI payments is complex. Some persons receive only federal payments, others receive both federal payments and a state supplementation, and some receive federally administered state supplements. Details are described next.

Series Bf592. Includes persons receiving a federal payment, as well as those receiving a state supplement administered by the federal government.

Series Bf593. Includes persons receiving a federal payment of some form, either a federal payment alone or a federal payment with a state supplement. The state supplementations are administered sometimes by the federal government and sometimes by the state government.

Series Bf595. Includes persons receiving either federally administered state supplements only, or both a federal SSI payment and state supplement.

Series Bf596. Includes persons receiving only federally administered state supplementation.

Series Bf597. Includes persons receiving either state supplementation only or both a federal payment and state-administered state supplementation.

Series Bf598. Includes persons receiving only state-administered state supplementation.

TABLE Bf599-620 Supplemental Security Income program – beneficiaries, payments, and monthly benefits, by source of funds and disability status: 1974-1999

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Total SSI payments				SSI average monthly benefit					
	Total	Federal	Federally administered state	State administered state	Total	Federally administered	Federal	State supplementation		
			supplementation	supplementation				Total	Federally administered	State administered
	Bf599	Bf600	Bf601	Bf602	Bf603	Bf604	Bf605	Bf606	Bf607	Bf608
Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	
1974	5,245,719	3,833,161	1,263,652	148,906	114.76	112.83	—	—	—	37.75
1975	5,878,224	4,313,538	1,402,534	162,152	116.36	114.39	96.17	66.86	70.71	45.59
1976	6,065,842	4,512,061	1,388,154	165,627	121.53	119.70	101.72	70.24	73.63	50.00
1977	6,306,041	4,703,292	1,430,794	171,955	126.39	124.52	106.61	72.39	75.36	53.68
1978	6,552,068	4,880,691	1,490,947	180,430	131.79	129.61	111.98	73.02	75.00	58.91
1979	7,075,394	5,279,181	1,589,544	206,669	157.87	155.65	123.89	106.45	112.26	71.23
1980	7,940,734	5,866,354	1,848,286	226,094	170.42	167.77	143.35	96.93	99.15	79.85
1981	8,593,414	6,517,727	1,838,969	236,718	185.49	182.73	160.29	95.46	97.78	80.31
1982	8,981,328	6,907,043	1,798,453	275,832	198.87	195.83	174.72	94.75	95.81	88.08
1983	9,404,227	7,422,524	1,711,319	270,384	214.69	211.68	188.94	94.42	94.81	92.01
1984	10,371,790	8,281,017	1,792,089	298,684	221.87	219.01	196.16	97.46	97.61	96.60
1985	11,060,476	8,777,341	1,972,597	310,538	228.66	226.06	200.84	103.06	103.82	98.05
1986	12,081,025	9,498,047	2,243,332	339,646	246.93	244.48	215.40	114.14	115.47	105.93
1987	12,951,091	10,029,197	2,562,700	359,194	254.23	251.58	218.39	122.95	124.76	110.85
1988	13,786,207	10,734,202	2,670,561	381,444	263.09	260.18	227.49	122.80	122.68	123.60
1989	14,979,898	11,606,066	2,954,668	419,164	277.65	274.63	238.83	131.61	131.70	130.90
1990	16,598,680	12,893,805	3,239,154	465,721	303.19	299.22	261.47	140.11	139.79	141.01
1991	18,524,229	14,764,795	3,230,844	528,590	324.44	320.53	286.03	132.99	130.55	150.46
1992	22,232,503	18,246,934	3,435,476	550,093	361.63	358.49	329.74	121.70	118.08	149.14
1993	24,556,867	20,721,613	3,269,540	565,714	348.18	344.92	317.41	113.22	108.50	151.00
1994	25,876,570	22,175,233	3,115,854	585,483	353.86	350.54	325.26	107.22	101.46	154.15
1995	27,627,658	23,919,430	3,117,850	590,378	361.58	358.40	334.12	109.31	105.24	143.91
1996	28,791,924	25,264,878	2,987,596	539,450	366.40	362.75	339.24	110.00	104.58	152.31
1997	29,052,089	25,457,387	2,913,181	681,521	—	—	—	—	—	—
1998	30,216,345	26,404,793	3,003,415	608,137	—	—	—	—	—	—
1999	—	—	—	—	—	—	—	—	—	—

(continued)

Year	Total SSI payments for assistance to			Persons receiving payments under program for			Federal monthly benefit rates			SSI average monthly benefits for		
	Aged	Blind	Disabled	Aged	Blind	Disabled	Individual in own household	Couple in own household	Increment for "essential person" in household	Aged	Blind	Disabled
	Thousand dollars	Thousand dollars	Thousand dollars	Number	Number	Number	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
1974	2,503,407	130,195	2,601,936	2,307,722	75,528	1,644,322	146	219	73	93.15	143.30	143.78
1975	2,604,792	130,936	3,142,476	2,333,685	75,315	1,950,625	158	237	79	92.99	148.96	143.07
1976	2,508,483	137,793	3,419,543	2,175,442	77,223	2,032,675	168	252	84	96.33	155.32	147.21
1977	2,448,724	146,070	3,710,788	2,077,945	78,363	2,130,991	178	267	89	98.75	161.39	152.05
1978	2,432,738	152,210	3,965,611	1,995,982	78,028	2,191,145	189	284	94	102.96	167.19	156.78
1979	2,525,374	166,835	4,380,932	1,903,369	78,108	2,220,827	208	312	104	125.66	214.56	183.80
1980	2,734,270	190,075	5,013,948	1,838,381	79,139	2,276,130	238	357	119	131.75	215.70	200.06
1981	2,818,143	206,263	5,566,157	1,707,166	79,198	2,280,525	265	397	133	141.56	230.33	216.81
1982	2,824,003	216,936	5,908,841	1,578,968	77,929	2,251,013	284	426	143	150.06	244.79	231.48
1983	2,813,897	229,374	6,356,975	1,545,999	79,446	2,329,596	304	437	153	162.30	259.74	247.87
1984	2,974,122	248,762	7,143,212	1,562,064	80,948	2,449,947	314	472	157	162.55	268.30	258.08
1985	3,034,596	264,162	7,754,588	1,529,674	82,622	2,586,741	325	488	163	168.30	277.32	262.71
1986	3,096,142	277,102	8,699,773	1,506,496	83,557	2,755,401	336	504	168	178.20	290.23	283.08
1987	3,194,145	291,174	9,457,787	1,483,353	83,876	2,888,852	340	510	170	187.24	299.74	288.29
1988	3,298,922	302,135	10,176,906	1,464,459	83,316	2,992,606	354	532	177	193.32	309.47	295.86
1989	3,476,324	315,692	11,180,155	1,471,216	83,267	3,117,095	368	553	184	203.83	322.97	311.20

(continued)

TABLE Bf599-620 Supplemental Security Income program – beneficiaries, payments, and monthly benefits, by source of funds and disability status: 1974-1999 *Continued*

Year	Total SSI payments for assistance to			Persons receiving payments under program for			Federal monthly benefit rates			SSI average monthly benefits for		
	Aged	Blind	Disabled	Aged	Blind	Disabled	Individual in own household	Couple in own household	Increment for "essential person" in household	Aged	Blind	Disabled
	Bf609	Bf610	Bf611	Bf612	Bf613	Bf614	Bf615	Bf616	Bf617	Bf618	Bf619	Bf620
	Thousand dollars	Thousand dollars	Thousand dollars	Number	Number	Number	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
1990	3,736,104	334,120	12,520,568	1,484,160	84,109	3,319,911	386	579	193	218.81	345.17	339.43
1991	3,890,412	346,828	14,268,192	1,497,817	85,227	3,615,438	407	610	204	228.15	355.33	363.54
1992	4,139,612	370,769	17,710,514	1,504,586	86,070	4,055,105	422	633	211	234.35	366.06	408.72
1993	4,250,092	374,998	19,925,929	1,507,463	86,169	4,469,711	434	652	217	243.62	363.94	383.11
1994	4,366,528	372,461	21,131,001	1,499,367	85,609	4,790,658	446	669	223	250.13	369.30	386.04
1995	4,467,146	375,512	22,778,547	1,479,415	84,273	5,010,326	458	687	229	256.92	374.76	392.27
1996	4,507,202	371,869	23,905,578	1,446,321	82,815	5,145,850	470	705	235	268.04	382.97	393.78
1997	4,531,973	374,857	24,006,254	1,395,845	81,449	5,078,995	484	726	242	—	—	—
1998	4,424,877	366,452	25,304,721	1,369,206	81,029	5,190,815	494	741	—	—	—	—
1999	—	—	—	—	—	—	500	751	—	—	—	—

Sources

Most recent data for series Bf599-602 and Bf609-616, U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Tables 7.A3 and 7.A4, pp. 287-8 and Table 2.B1, p. 90; (1997), Tables 7.A3 and 7.A4, pp. 288-9; and Table 2.B.1, p. 90. Most recent data for series Bf603-608 and Bf616-620, U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement*, 1997, Tables 7.A3, and 7.A5, pp. 288-9 and Table 2.B.1, p. 92. Annual data from earlier years is from *Social Security Bulletin: Annual Statistical Supplement* (1981, 1983, and 1988).

Documentation

See Table Bf591-598 for a discussion of the Supplemental Security Income program.

Series Bf603-608 and Bf618-620. The series for average monthly payments reported here include retroactive payments. The *Annual Statistical Supplements* for 1998 and 1999 report the series excluding retroactive payments, which can be as much as 7 percent of average payments.

Series Bf612-614 and Bf618-620. As of December.

Series Bf615-617. The rates effective July 1 (1974-1983) and January 1 thereafter. Information for series Bf617 is no longer reported for years after 1996.

TABLE Bf621-633 Public assistance – recipients and annual payments, by program: 1933-1975 [Earlier estimates]

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Annual payments					Recipients							
	Old-Age Assistance	Aid to the Blind	Aid to the Permanently and Totally Disabled	Aid to the Families with Dependent Children	General assistance	Old-Age Assistance	Aid to the Blind	Aid to the Permanently and Totally Disabled	Aid to Families with Dependent Children			General assistance	Institutional services in intermediate-care facilities
	Bf621 ¹	Bf622 ¹	Bf623 ¹	Bf624	Bf625	Bf626 ¹	Bf627 ¹	Bf628 ¹	Bf629	Bf630	Bf631	Bf632	Bf633
	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand
1933	26,071	5,839	—	40,504	758,752	107	25	—	112	—	285	—	—
1934	32,244	7,073	—	40,636	1,200,615	206	33	—	113	—	280	—	—
1935	64,966	7,970	—	41,727	1,433,182	378	35	—	117	—	286	—	—
1936	155,500	12,800	—	49,700	437,100	1,106	45	—	162	546	404	4,545	—
1937	309,600	16,200	—	70,500	406,700	1,579	56	—	229	769	568	4,840	—
1938	394,900	19,000	—	97,600	475,600	1,779	67	—	281	935	688	5,177	—
1939	433,500	20,400	—	114,800	482,100	1,912	70	—	316	1,042	764	4,675	—
1940	472,800	21,700	—	133,400	392,200	2,070	73	—	372	1,222	895	3,618	—
1941	540,100	22,900	—	153,300	273,200	2,238	77	—	391	1,288	944	2,068	—
1942	593,400	24,600	—	158,400	180,400	2,230	79	—	349	1,158	851	1,000	—
1943	650,000	25,000	—	140,400	110,900	2,149	76	—	272	916	676	558	—
1944	690,700	25,300	—	135,100	89,300	2,066	72	—	254	862	639	477	—
1945	725,700	26,500	—	149,500	86,300	2,056	71	—	274	943	701	507	—
1946	819,800	30,700	—	208,400	120,400	2,196	77	—	346	1,190	885	673	—
1947	986,400	36,200	—	294,000	164,200	2,332	81	—	416	1,426	1,060	739	—
1948	1,128,200	41,300	—	362,800	198,500	2,498	86	—	475	1,632	1,214	842	—
1949	1,372,900	48,400	—	472,400	281,300	2,736	93	—	599	2,048	1,521	1,337	—

(continued)

TABLE Bf621-633 Public assistance – recipients and annual payments, by program: 1933-1975
[Earlier estimates] Continued

Year	Annual payments					Recipients							
	Old-Age Assistance	Aid to the Blind	Aid to the Permanently and Totally Disabled	Aid to the Families with Dependent Children	General assistance	Old-Age Assistance	Aid to the Blind	Aid to the Permanently and Totally Disabled	Aid to Families with Dependent Children			General assistance	Institutional services in intermediate-care facilities
									Families	All persons	Children		
	Bf621 ¹	Bf622 ¹	Bf623 ¹	Bf624	Bf625	Bf626 ¹	Bf627 ¹	Bf628 ¹	Bf629	Bf630	Bf631	Bf632	Bf633
Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	
1950	1,453,900	52,600	8,000	547,200	292,800	2,786	97	69	651	2,233	1,661	866	—
1951	1,427,600	54,500	54,300	548,800	194,500	2,701	97	124	592	2,041	1,523	664	—
1952	1,462,900	59,600	81,500	538,000	169,500	2,635	98	161	596	1,991	1,495	587	—
1953	1,513,300	63,600	102,000	544,000	151,300	2,582	100	192	547	1,941	1,464	618	—
1954	1,497,600	65,200	119,800	573,100	196,000	2,553	102	222	604	2,173	1,639	880	—
1955	1,488,000	67,800	134,600	612,200	214,000	2,538	104	241	602	2,192	1,661	743	—
1956	1,529,000	72,900	150,100	634,900	197,200	2,499	107	266	615	2,270	1,731	731	—
1957	1,609,400	78,700	172,200	716,800	211,100	2,480	108	290	667	2,497	1,912	907	—
1958	1,647,400	81,500	196,600	839,900	303,300	2,438	110	325	755	2,486	2,181	1,246	—
1959	1,620,700	83,600	217,300	937,200	342,000	2,370	108	346	776	2,946	2,265	1,107	—
1960	1,626,000	86,100	236,400	994,400	319,500	2,305	107	369	803	3,073	2,370	1,244	—
1961	1,569,000	84,500	255,600	1,148,800	351,400	2,229	103	389	916	3,566	2,753	1,069	—
1962	1,566,100	83,900	281,100	1,289,800	289,500	2,183	99	428	932	3,789	2,844	900	—
1963	1,610,300	85,100	317,700	1,355,500	277,400	2,152	97	464	954	3,930	2,951	872	—
1964	1,606,600	86,200	355,600	1,496,500	270,300	2,120	95	509	1,012	4,219	3,170	779	—
1965	1,594,200	77,300	416,800	1,644,100	260,600	2,087	85	557	1,054	4,396	3,316	677	—
1966	1,630,100	84,700	487,200	1,849,900	251,900	2,073	84	588	1,127	4,666	3,526	663	—
1967	1,698,100	87,000	573,600	2,249,700	323,100	2,073	83	646	1,297	5,309	3,986	782	—
1968	1,673,200	87,800	655,800	2,823,800	419,500	2,027	81	702	1,522	6,086	4,555	826	14
1969	1,746,700	91,400	786,800	3,533,300	474,500	2,074	81	803	1,875	7,313	5,413	860	92
1970	1,866,100	97,500	975,500	4,857,200	632,400	2,082	81	935	2,552	9,659	7,033	1,056	163
1971	1,919,700	100,700	1,185,300	6,230,400	760,600	2,024	80	1,068	2,918	10,653	7,707	982	196
1972	1,894,000	104,700	1,392,900	7,019,600	741,000	1,933	80	1,169	3,123	11,069	7,986	865	—
1973	1,749,300	103,000	1,566,100	7,291,900	688,100	1,820	78	1,275	3,156	10,815	7,813	700	—
1974	4,800	100	3,000	7,990,800	825,400	19	(Z)	17	3,312	11,006	7,885	851	—
1975	4,600	100	2,900	9,348,900	1,138,000	19	(Z)	17	3,555	11,389	8,090	977	—

(Z) Fewer than 500 recipients.

¹ Beginning in 1974, includes only Puerto Rico, Guam, and the Virgin Islands. See text.

Sources

U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement* (1975), Table 175, and *Social Security Bulletin, Annual Statistical Supplement* (1966), Table 113. For years 1933-1935: *Social Security Bulletin* 14 (9) (1951): 43.

Documentation

Prior to 1935 public assistance was a state and local responsibility. After the Social Security Administration Act of 1935, assistance programs financed in part by federal grants-in-aid were in effect on a statewide basis in 1936 in forty-two states for Old-Age Assistance, twenty-seven states for Aid to Dependent Children, and twenty-five states for Aid to the Blind. Programs have been in effect in the forty-eight contiguous states and the District of Columbia beginning 1938 for Old-Age Assistance, 1955 for Aid to Dependent Children, and 1953 for Aid to the Blind. Approval of the first plans for Aid to the Permanently and Totally Disabled was effective October 1950 and, in 1957, forty-four states and the District of Columbia were participating. Assistance payments for all the previously mentioned programs were still financed in part from federal funds and, with the exception of Nevada (Aid to the Permanently and Totally Disabled), these programs were in effect in all fifty states, the District of Columbia, Guam, Puerto Rico, and Virgin Islands until 1974. General assistance, provided from state or local funds or both, is available to certain other categories of needy persons in all fifty-four jurisdictions.

Beginning in the *Social Security Bulletin, Annual Statistical Supplement* (1976), p. 200, data on the Public Assistance programs were reported from a different source, and the new series reported were considered not comparable with the previously listed series. See Table Bf634-648 for modern information on these programs back to 1960 and for 1955, 1950, 1945, 1940, and 1936.

Series Bf630. Aid to Families with Dependent Children (AFDC) recipients include children and one or both parents, or one caretaker relative other than a parent, in families in which the requirements of such adults were considered in determining the amount of assistance. The figure is partially estimated before 1950. The program for Aid to Dependent Children began paying benefits to support payments for a mother or other relative caring for the child in 1950. Under the Public Welfare Amendments of 1962, the program was renamed Aid to Families with Dependent Children to reflect expanded coverage of the adults caring for the dependent children. The AFDC and the Emergency Assistance programs have been replaced by the Temporary Assistance for Needy Families program under the Personal Responsibility and Work Opportunity Reconciliation Act of 1996. The Act was designed to limit the length of time that families could receive assistance and promote a return to the work force by those who are able.

Series Bf632. Partly estimated. For certain periods, the series excludes data for Florida, Idaho, Indiana, Kentucky, Nebraska, Nevada, New Mexico, Tennessee, Texas, and Vermont. The number of recipients in 1933-1935 was not reported, but the number of cases was 3.246 million in 1933, 5.368 million in 1934, 2.89 million in 1935, and 1.51 million in 1936.

Series Bf621-623 and Bf626-628. Beginning in 1974, includes only Puerto Rico, Guam, and the Virgin Islands, because the Old-Age Assistance, Aid to the Blind, and Totally Disabled programs for the United States were superseded by Supplementary Security Income, except in those territories.

Series Bf626-633. In December.

Series Bf630. The original source may contain a typographical error for 1958 because the percentage of recipients who are children – series Bf631 divided by series Bf630 – is unusually high. The value reported here is believed to be true.

TABLE Bf634-648 Public assistance - recipients and annual payments, by program: 1936-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Annual payments												Average monthly number of recipients						States with emergency assistance programs										
	Aid to the Permanently Disabled						Aid to the Permanently and Totally Disabled						TANF/AFDC																
	Old-Age Assistance		Aid to the Blind		Emergency assistance		General assistance		Old-Age Assistance		Aid to the Blind		Emergency assistance		General assistance		Recipients			Families		Total		Children		General assistance		Emergency assistance	
	Bf634 ¹	Thousand dollars	Bf635 ¹	Thousand dollars	Bf636 ¹	Thousand dollars	Bf637	Thousand dollars	Bf638	Thousand dollars	Bf639	Thousand dollars	Bf640 ¹	Thousand	Bf641 ¹	Thousand	Bf642 ¹	Thousand		Bf643	Thousand	Bf644	Thousand	Bf645	Thousand	Bf646 ²	Thousand	Bf647	Thousand
1936	155,484	12,811	—	—	49,678	437,134	—	—	—	738	42.7	—	147	534	361	—	—	147	534	361	—	—	—	—	—	—	—	—	—
1940	475,704	21,838	—	—	133,770	404,963	—	—	—	1,986	71.6	—	349	1,182	840	—	—	349	1,182	840	—	—	—	—	—	—	—	—	—
1945	726,550	26,557	—	—	149,667	87,930	—	—	—	2,044	71.2	—	259	907	656	—	—	259	907	656	—	—	—	—	—	—	—	—	—
1950	1,461,624	52,698	7,967	—	551,653	298,262	—	—	—	2,783	95.5	63	644	2,205	1,637	—	—	644	2,205	1,637	—	—	—	—	—	—	—	—	—
1955	1,490,352	67,958	135,168	—	617,841	214,266	—	—	—	2,539	103.5	234	612	2,214	1,673	—	—	612	2,214	1,673	—	—	—	—	—	—	—	—	—
1960	1,629,541	86,231	237,366	—	1,000,784	322,465	—	—	—	2,330	107.4	359	787	3,005	2,314	—	—	787	3,005	2,314	—	—	—	—	—	—	—	—	—
1961	1,571,309	84,739	256,910	—	1,156,769	355,991	—	—	—	2,261	104.6	379	869	3,354	2,587	—	—	869	3,354	2,587	—	—	—	—	—	—	—	—	—
1962	1,571,162	84,039	282,711	—	1,298,774	292,709	—	—	—	2,196	99.9	409	931	3,676	2,818	—	—	931	3,676	2,818	—	—	—	—	—	—	—	—	—
1963	1,615,023	85,335	318,948	—	1,365,851	279,623	—	—	—	2,159	97.4	448	947	3,876	2,909	—	—	947	3,876	2,909	—	—	—	—	—	—	—	—	—
1964	1,612,983	86,558	357,856	—	1,510,352	272,737	—	—	—	2,131	96.2	488	927	4,118	3,091	—	—	927	4,118	3,091	—	—	—	—	—	—	—	—	—
1965	1,600,708	85,121	417,720	—	1,660,186	259,225	—	—	—	2,105	91.5	536	1,039	4,329	3,256	—	—	1,039	4,329	3,256	—	—	—	—	—	—	—	—	—
1966	1,633,675	85,615	487,301	—	1,863,925	263,866	—	—	—	2,077	84.4	572	1,088	4,513	3,411	—	—	1,088	4,513	3,411	—	—	—	—	—	—	—	—	—
1967	1,702,091	87,711	574,574	—	2,266,400	325,847	—	—	—	2,067	83.0	617	1,217	5,014	3,771	—	—	1,217	5,014	3,771	—	—	—	—	—	—	—	—	—
1968	1,676,632	88,885	658,589	—	2,849,298	421,211	—	—	—	2,042	81.3	674	1,410	5,705	4,275	—	—	1,410	5,705	4,275	—	—	—	—	—	—	—	—	—
1969	1,752,730	92,204	788,079	—	3,563,427	472,360	—	—	—	6,699	80.3	817	1,698	6,706	4,985	—	—	1,698	6,706	4,985	—	—	—	—	—	—	—	—	—
1970	1,862,412	98,292	999,861	—	4,852,964	618,319	—	—	—	11,396	80.4	877	2,208	8,466	6,214	—	—	2,208	8,466	6,214	—	—	—	—	—	—	—	—	—
1971	1,888,878	100,840	1,189,636	—	6,203,528	760,559	—	—	—	19,843	80.5	1,004	2,762	10,241	7,434	—	—	2,762	10,241	7,434	—	—	—	—	—	—	—	—	—
1972	1,876,755	105,515	1,390,509	—	6,909,260	740,499	—	—	—	44,180	80.6	1,133	3,049	10,947	7,905	—	—	3,049	10,947	7,905	—	—	—	—	—	—	—	—	—
1973	1,743,465	104,373	1,609,572	—	7,212,035	688,502	—	—	—	39,265	78.2	1,217	3,148	10,949	7,902	—	—	3,148	10,949	7,902	—	—	—	—	—	—	—	—	—
1974	4,725	88	2,947	—	7,916,563	825,408	—	—	—	64,031	19	17	3,230	10,864	7,822	—	—	3,230	10,864	7,822	—	—	—	—	—	—	—	—	—
1975	4,599	79	2,953	—	9,210,995	1,138,211	—	—	—	77,516	18	17	3,498	11,346	8,095	—	—	3,498	11,346	8,095	—	—	—	—	—	—	—	—	—
1976	4,783	75	3,066	—	10,140,543	1,227,865	—	—	—	55,673	19	17	3,579	11,304	8,001	—	—	3,579	11,304	8,001	—	—	—	—	—	—	—	—	—
1977	7,938	76	3,426	—	10,603,820	1,237,609	—	—	—	66,132	19	18	3,588	11,050	7,773	—	—	3,588	11,050	7,773	—	—	—	—	—	—	—	—	—
1978	5,076	82	3,754	—	10,730,415	1,205,381	—	—	—	80,919	19	19	3,522	10,570	7,402	—	—	3,522	10,570	7,402	—	—	—	—	—	—	—	—	—
1979	9,448	170	9,064	—	11,068,864	1,230,744	—	—	—	84,043	19	20	3,509	10,312	7,179	—	—	3,509	10,312	7,179	—	—	—	—	—	—	—	—	—
1980	8,873	135	8,702	—	12,475,245	1,442,278	—	—	—	113,238	19	21	3,712	10,774	7,419	—	—	3,712	10,774	7,419	—	—	—	—	—	—	—	—	—
1981	9,400	159	10,364	—	12,981,115	—	—	—	—	123,467	19	22	3,835	11,079	7,527	—	—	3,835	11,079	7,527	—	—	—	—	—	—	—	—	—
1982	8,039	139	9,869	—	12,877,906	—	—	—	—	102,344	19	22	3,542	10,258	6,903	—	—	3,542	10,258	6,903	—	—	—	—	—	—	—	—	—
1983	7,889	136	9,846	—	13,837,228	—	—	—	—	125,246	18	22	3,686	10,761	7,098	—	—	3,686	10,761	7,098	—	—	—	—	—	—	—	—	—
1984	7,839	129	10,057	—	14,503,710	—	—	—	—	141,137	18	22	3,714	10,831	7,144	—	—	3,714	10,831	7,144	—	—	—	—	—	—	—	—	—
1985	7,620	134	10,412	—	15,195,835	—	—	—	—	157,304	18	23	3,701	10,855	7,198	—	—	3,701	10,855	7,198	—	—	—	—	—	—	—	—	—
1986	7,532	135	10,976	—	16,033,074	—	—	—	—	178,284	17	24	3,763	11,038	7,334	—	—	3,763	11,038	7,334	—	—	—	—	—	—	—	—	—
1987	7,434	137	10,825	—	16,372,535	—	—	—	—	213,903	17	24	3,776	11,027	7,366	—	—	3,776	11,027	7,366	—	—	—	—	—	—	—	—	—
1988	7,354	131	11,012	—	16,826,794	—	—	—	—	278,906	17	24	3,749	10,915	7,329	—	—	3,749	10,915	7,329	—	—	—	—	—	—	—	—	—
1989	7,273	139	11,559	—	17,465,943	—	—	—	—	296,841	17	25	3,799	10,993	7,420	—	—	3,799	10,993	7,420	—	—	—	—	—	—	—	—	—

Notes appear at end of table

(continued)

Year	Annual payments										Average monthly number of recipients					
	Aid to the Permanently and Totally Disabled					Aid to the Permanently and Totally Disabled					TANF/AFDC			Recipients		
	Old-Age Assistance	Aid to the Blind	Emergency assistance	General assistance	Old-Age Assistance	Aid to the Blind	Emergency assistance	General assistance	Old-Age Assistance	Aid to the Blind	Families	Total	Children	General assistance	Emergency assistance	States with emergency assistance programs
Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	States
1990	8,530	157	12,352	19,066,541	—	348,986	17	0.3	26	4,057	11,695	7,917	1,220	56.0	33	
1991	11,088	218	19,006	20,930,600	—	302,894	17	0.3	27	4,467	12,930	8,715	1,332	59.7	34	
1992	7,504	139	13,189	21,655,881	—	272,853	17	0.3	28	4,829	13,773	9,303	1,184	52.7	34	
1993	8,791	131	14,044	22,688,016	—	387,113	16	0.3	28	5,012	14,205	9,574	1,161	56.8	35	
1994	9,398	119	13,267	22,827,399	—	802,258	16	0.3	27	5,035	14,164	9,570	1,105	60.5	49	
1995	8,124	106	12,636	21,608,686	—	3,447,361	16	0.2	26	4,798	13,417	9,134	922	84.1	50	
1996	8,076	99	12,163	20,583,810	—	2,716,705	15	0.2	25	4,443	12,320	8,458	744	69.8	51	
1997	—	—	—	22,031,399	—	403,138	—	—	—	3,747	10,375	7,277	645	81.8	34	

¹ Beginning in 1974, includes only Puerto Rico, Guam, and the Virgin Islands. The Supplemental Security Income (SSI) program superseded these programs elsewhere.

² For the period 1936-1950, reports data collected as of December of each year.

Source

U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement* (1999), Table 9.G1, p. 342, Table 9.K1, p. 351, and Table 9.L1, p. 352.

Documentation

See the text for Table Bf621-633 for more information.

Series Bf637 and Bf643-645. Thirty-four states had converted to Temporary Assistance to Needy Families from Aid to Families with Dependent Children as of January 1, 1997; eight phased in over the next five months; the remaining twelve waited until July 1, 1997.

Series Bf639 and Bf647. Reporting on emergency assistance was initiated in July 1969. These data represent the latest revisions provided by the Social Security Administration. The revised annual data for the period 1936-1959 are not available except in years ending in 0 and 5. Table Bf621-633 presents earlier estimates for these programs reported in a different way for the period 1936-1975.

Series Bf638. After 1980 information was not available.

TABLE Bf649-662 Public assistance - average monthly payment, by program: 1936-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Earlier estimates										Later estimates											
	Old-Age Assistance		Aid to the Blind		Aid to the Permanently and Totally Disabled		Aid to Families with Dependent Children		General assistance		Institutional services, intermediate-care facilities		Old-Age Assistance		Aid to the Blind		Aid to the Permanently and Totally Disabled		Temporary Assistance to Needy Families/Aid to Families with Dependent Children		Emergency assistance (per family)	
	Bf649	Bf650	Bf651	Bf652	Bf653	Bf654	Bf655	Bf656	Bf657	Bf658	Bf659	Bf660	Bf661	Bf662	Bf663	Bf664	Bf665	Bf666	Bf667	Bf668	Bf669	Bf670
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
1936	18.80	26.10	—	29.85	8.80	8.00	—	17.55	25.00	—	28.15	7.75	8.00	—	—	—	—	—	—	—	—	—
1937	19.45	27.20	—	31.50	9.35	8.50	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1938	19.55	25.20	—	31.95	9.60	7.90	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1939	19.30	25.45	—	31.75	9.65	8.30	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1940	20.25	25.35	—	32.40	9.85	8.30	—	19.96	24.43	—	31.98	9.43	8.30	—	—	—	—	—	—	—	—	—
1941	21.25	25.80	—	33.65	10.20	9.40	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1942	23.35	26.55	—	36.25	10.95	11.65	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1943	26.65	27.95	—	41.55	12.35	14.55	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1944	28.45	29.30	—	45.60	13.40	15.60	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1945	30.90	33.50	—	52.05	15.15	16.55	—	29.62	31.07	—	48.18	13.75	16.55	—	—	—	—	—	—	—	—	—
1946	35.30	36.65	—	62.25	18.10	18.45	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1947	37.40	39.60	—	63.00	18.40	20.60	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1948	42.00	43.55	—	71.90	20.90	22.40	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1949	44.75	46.10	—	74.20	21.70	21.25	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1950	43.05	46.00	44.10	71.45	20.85	22.25	—	43.76	45.96	—	71.33	17.64	22.25	—	—	—	—	—	—	—	—	—
1951	44.55	48.05	46.45	75.80	22.00	22.90	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1952	48.80	53.50	48.40	82.10	23.45	23.30	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1953	48.90	54.05	47.90	82.30	23.20	22.05	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1954	48.70	54.35	48.35	83.70	23.25	22.85	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1955	50.05	55.55	48.75	85.50	23.50	23.30	—	48.92	54.72	—	84.17	23.26	22.74	—	—	—	—	—	—	—	—	—
1956	53.25	60.00	50.70	91.50	24.80	23.45	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1957	55.50	62.20	52.35	95.15	25.40	22.70	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1958	56.95	63.55	53.80	100.40	26.65	24.05	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1959	56.70	65.60	54.15	103.70	27.30	25.05	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1960	58.90	67.45	56.15	108.35	28.35	24.85	—	58.27	66.92	—	105.75	27.75	25.10	—	—	—	—	—	—	—	—	—
1961	57.60	68.05	57.05	114.65	29.45	26.15	—	57.91	67.50	—	110.97	28.74	25.11	—	—	—	—	—	—	—	—	—
1962	61.55	71.95	58.50	119.10	29.30	26.30	—	59.61	70.12	—	116.30	29.44	27.03	—	—	—	—	—	—	—	—	—
1963	62.80	73.95	59.85	122.40	29.70	27.45	—	62.34	72.98	—	120.19	29.36	27.07	—	—	—	—	—	—	—	—	—
1964	63.65	76.15	62.25	131.30	31.50	30.50	—	63.07	74.97	—	126.88	30.57	29.07	—	—	—	—	—	—	—	—	—
1965	63.10	81.35	66.50	136.95	32.85	31.65	—	63.37	77.54	—	133.20	31.96	30.72	—	—	—	—	—	—	—	—	—
1966	68.05	86.85	74.75	150.10	36.25	36.20	—	65.54	84.56	—	142.83	34.42	34.60	—	—	—	—	—	—	—	—	—
1967	70.15	90.45	80.60	161.70	39.50	39.40	—	68.61	88.08	—	155.19	37.67	38.07	—	—	—	—	—	—	—	—	—
1968	69.55	92.15	82.65	168.15	42.05	44.70	—	68.76	91.06	—	168.41	41.62	44.51	—	—	—	—	—	—	—	—	—
1969	73.90	98.75	90.15	176.05	45.15	50.25	—	71.51	95.72	—	174.89	44.28	48.15	—	—	—	—	—	—	—	—	—
1970	77.65	104.35	97.65	187.90	49.65	57.85	—	75.32	101.93	—	183.13	47.77	53.82	—	—	—	—	—	—	—	—	—
1971	77.50	106.50	102.25	190.90	52.30	64.80	—	76.60	104.39	—	187.16	50.48	58.82	—	—	—	—	—	—	—	—	—
1972	79.95	112.85	106.15	191.75	54.10	72.10	—	78.07	109.03	—	188.87	52.60	69.44	—	—	—	—	—	—	—	—	—
1973	76.15	112.00	109.75	195.20	56.95	82.00	—	78.44	111.29	—	190.91	54.89	76.87	—	—	—	—	—	—	—	—	—
1974	—	—	—	217.75	65.50	96.35	—	20.48	14.97	—	204.27	60.72	90.70	—	—	—	—	—	—	—	—	—

Notes appear at end of table

(continued)

Year	Earlier estimates						Later estimates															
	Old-Age Assistance		Aid to the Blind		Aid to the Permanently and Totally Disabled		Aid to Families with Dependent Children		General assistance		Institutional services, intermediate-care facilities		Aid to the Blind		Aid to the Permanently and Totally Disabled		Temporary Assistance to Needy Families/Aid to Families with Dependent Children		Emergency assistance (per family)			
	Bf649	Bf650	Bf651	Bf652	Bf653	Bf654	Bf655	Bf656	Bf657	Bf658	Bf659	Bf660	Bf661	Bf662	Bf663	Bf664	Bf665	Bf666	Bf667	Bf668	Bf669	
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
1975	—	—	—	—	—	—	—	20.74	15.22	14.67	219.44	67.65	98.40	168.85	—	—	—	—	—	—	—	—
1976	—	—	—	—	—	—	—	21.01	15.78	14.98	236.10	74.75	109.56	168.43	—	—	—	—	—	—	—	—
1977	—	—	—	—	—	—	—	21.75	16.91	15.94	246.27	79.97	119.74	168.05	—	—	—	—	—	—	—	—
1978	—	—	—	—	—	—	—	22.31	18.59	16.72	253.89	84.60	126.62	195.24	—	—	—	—	—	—	—	—
1979	—	—	—	—	—	—	—	41.52	39.35	38.02	262.86	89.45	128.84	195.92	—	—	—	—	—	—	—	—
1980	—	—	—	—	—	—	—	39.18	35.85	34.61	280.03	96.49	127.18	194.29	—	—	—	—	—	—	—	—
1981	—	—	—	—	—	—	—	41.18	42.97	39.57	282.04	97.64	—	209.51	—	—	—	—	—	—	—	—
1982	—	—	—	—	—	—	—	35.53	36.94	36.57	303.02	103.60	—	278.54	—	—	—	—	—	—	—	—
1983	—	—	—	—	—	—	—	35.99	36.45	36.85	312.82	107.16	—	283.15	—	—	—	—	—	—	—	—
1984	—	—	—	—	—	—	—	36.18	37.28	37.41	325.44	111.60	—	276.97	—	—	—	—	—	—	—	—
1985	—	—	—	—	—	—	—	35.97	38.91	37.61	342.15	116.65	—	312.98	—	—	—	—	—	—	—	—
1986	—	—	—	—	—	—	—	36.02	38.65	37.78	355.04	121.05	—	362.45	—	—	—	—	—	—	—	—
1987	—	—	—	—	—	—	—	36.07	39.78	37.71	361.37	123.73	—	358.29	—	—	—	—	—	—	—	—
1988	—	—	—	—	—	—	—	35.90	38.86	37.99	374.07	128.47	—	420.89	—	—	—	—	—	—	—	—
1989	—	—	—	—	—	—	—	35.59	41.80	38.71	383.14	132.40	—	461.45	—	—	—	—	—	—	—	—
1990	—	—	—	—	—	—	—	42.18	41.32	39.92	391.67	135.86	—	476.50	—	—	—	—	—	—	—	—
1991	—	—	—	—	—	—	—	55.19	55.97	57.98	390.44	134.89	—	422.07	—	—	—	—	—	—	—	—
1992	—	—	—	—	—	—	—	37.66	38.45	39.05	373.71	131.03	—	431.41	—	—	—	—	—	—	—	—
1993	—	—	—	—	—	—	—	44.88	39.63	41.43	377.24	133.10	—	568.17	—	—	—	—	—	—	—	—
1994	—	—	—	—	—	—	—	48.76	39.22	40.50	377.78	134.30	—	1,105.95	—	—	—	—	—	—	—	—
1995	—	—	—	—	—	—	—	43.13	37.58	41.15	375.31	134.21	—	3,415.93	—	—	—	—	—	—	—	—
1996	—	—	—	—	—	—	—	43.58	37.57	40.36	386.10	139.23	—	3,033.42	—	—	—	—	—	—	—	—
1997	—	—	—	—	—	—	—	—	—	—	490.01	176.95	—	410.74	—	—	—	—	—	—	—	—

¹ Beginning in 1974, includes only Puerto Rico, Guam, and the Virgin Islands. The Supplemental Security Income (SSI) program superseded these programs elsewhere.

² For 1936-1950, as of December of each year.

³ For 1983-1997, excludes family count and expenditures for states providing only partial data.

Sources

Series Bf649-654, 1950-1975: U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement* (1974), Table 155; 1936-1949: *Social Security Bulletin, Annual Statistical Supplement* (1966), Table 113, p. 115. Series Bf655-661, U.S. Social Security Administration, *Social Security Bulletin, Annual Statistical Supplement* (1999), Table 9.G1, p. 342, Table 9.K1, p. 351, and Table 9.L1, p. 352.

Documentation

See the text for Tables Bf621-648 for more information about the public assistance programs. This table reports two sets of alternative series. In 1976, the Social Security Administration stated that the data in series Bf656-661 are not comparable with series Bf649-654 because of a change in source (p. 200). Although not identical, the series are very closely related. The correlations between the two versions of the series for the overlapping years of 1936, 1940, 1945, 1950, 1955, and 1960-1973 are 0.998 for Old-Age Assistance, 0.999 for Aid to the Blind, and 0.998 for Aid to the Permanently and Totally Disabled. The correlations for overlapping years of 1936, 1940, 1945, 1950, 1955, and 1960-1974 are 0.977 for Aid to Families with Dependent Children (AFDC) per family, 0.998 for AFDC per recipient, and 0.999 for general assistance. All series include nonmedical vendor payments.

TABLE Bf663–678 Public assistance and federal work programs – recipients, assistance, persons employed, and earnings: 1933–1943

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Number of cases			Persons employed				
	Federal Emergency Relief Administration	Farm Security Administration	Civilian Conservation Corps	National Youth Administration		Works Projects Administration	Civil Works Administration	Other federal emergency projects
				Student work program	Out-of-school work program			
	Bf663	Bf664	Bf665	Bf666	Bf667	Bf668	Bf669	Bf670
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	
1933	101	—	290	—	—	—	3,597	264
1934	459	—	330	—	—	—	—	331
1935	96	130	459	283	—	2,667	—	408
1936	11	135	328	411	178	2,243	—	506
1937	—	109	284	304	136	1,594	—	235
1938	—	115	275	372	240	3,156	—	167
1939	—	96	266	434	296	2,109	—	141
1940	—	45	246	449	326	1,826	—	22
1941	—	26	126	333	283	1,023	—	2
1942	—	—	—	86	—	300	—	—
1943	—	—	—	—	—	—	—	—

(continued)

Year	Payments for assistance or earnings							
	Federal Emergency Relief Administration	Farm Security Administration subsistence program	Civilian Conservation Corps	National Youth Administration		Works Projects Administration	Civil Works Administration	Other federal emergency projects
				Student work program	Out-of-school work program			
	Bf671	Bf672	Bf673	Bf674	Bf675	Bf676	Bf677	Bf678
Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	
1933	5,753	—	140,736	—	—	—	214,956	30,718
1934	61,069	—	260,957	—	—	—	503,060	275,161
1935	114,996	2,541	332,851	6,364	—	238,018	—	289,897
1936	3,873	20,365	292,397	26,329	28,883	1,592,039	—	498,415
1937	467	35,894	245,756	24,287	32,664	1,186,266	—	324,639
1938	—	22,579	230,318	19,598	41,560	1,751,053	—	186,505
1939	—	19,055	230,513	22,707	51,538	1,565,515	—	247,285
1940	—	18,282	215,846	26,864	65,211	1,269,617	—	92,604
1941	—	12,281	155,604	25,118	94,032	937,366	—	12,904
1942	—	6,271	34,030	11,328	32,009	503,055	—	730
1943	—	—	—	3,794	—	46,737	—	—

Sources

U.S. Social Security Administration, *Social Security Bulletin* 14 (9) (1951): 43 and *Social Security Bulletin: Yearbook* (1945), p. 21.

Documentation

The estimates shown here for 1933–1939 are very similar to those in the National Resources Planning Board report on *Security, Work, and Relief Policies* (1942), Appendixes 9 and 10.

The National Youth Administration (NYA) and Works Projects Administration programs were discontinued before the end of 1943.

Each of the individual programs provided the data about their operations to the Social Security Administration, except in the following cases. The data for the Federal Emergency Relief Administration (FERA), series Bf663 and Bf671, and for the NYA through June 1939, series Bf666–667 and Bf674–675, were provided by the Works Projects Administration.

Deeming that the depressed economy was a national emergency, the Roosevelt administration established a series of New Deal programs to aid

the needy and the unemployed. The initial program was the FERA, which provided direct relief to families and work relief for able-bodied workers, series Bf671. The Civil Works Administration (CWA) provided work relief between November 1933 and March 1934. Meanwhile, the Civilian Conservation Corps (CCC) provided work and educational opportunities for young men, as they worked to conserve forests, farmland, and other natural sites. The Works Progress Administration (WPA), later renamed the Works Projects Administration, provided work relief for unemployed “employables” while building schools, roads, post offices, sidewalks, and a host of other projects. The NYA and the Farm Security Administration (FSA) were smaller programs that, respectively, employed students and provided aid to farmers in obtaining their own farms.

Series Bf663 and Bf671. FERA programs provided direct relief, work relief, emergency education, student aid, rural rehabilitation, and transient programs.

TABLE Bf663-678 Public assistance and federal work programs – recipients, assistance, persons employed, and earnings: 1933-1943 *Continued*

Series Bf664 and Bf672. FSA programs included emergency grant vouchers and cases receiving only FSA commodities and the value of such commodities. These were dropped from the series in June 1942 because the appropriation was drastically reduced and payments were limited to need occasioned by natural disasters.

Series Bf665-670 and Bf672-678. Information on the CCC, NYA, WPA, and the other federal agencies excludes administrative employees and their earnings and cost of materials, equipment, and other items incidental to operation of work programs.

Series Bf665 and Bf673, CCC figures. Average number of enrolled persons. Earnings were estimated by multiplying average monthly number of persons enrolled by average expenditures per enrollee for cash allowances, clothing, shelter, subsistence and medical care, and certain other items. Beginning July 1941, average expenditures per enrolled were estimated at \$67.20 for enrollees other than Indians, \$60.50 for Indians.

Series Bf666-667 and Bf674-675, NYA. Persons employed during month, except for the out-of-school program after June 1941, in which case the data represent the average of weekly employment counts. Information on the out-of-school program of the NYA is no longer included as public assistance after June 1942 because the purpose of the program changed from employment based on need to training for war industry.

Series Bf668 and Bf676, WPA. Average weekly number employed on projects financed from WPA funds. Beginning July 1942, earnings represent expenditures (approved vouchers) for labor during month.

Series Bf670 and Bf678, other federal projects. Average number of weekly employed persons during the monthly period ending on the fifteenth, on projects financed in whole or in part from emergency federal funds other than CCC, NYA, WPA, and CWA. Beginning with October 1941, the data include only employment and earnings on projects financed from Public Works Administration funds. Data are from the Bureau of Labor Statistics.

TABLE Bf679-688 Public child health and welfare service programs – children and mothers served: 1937-1970

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Children served in Crippled Children's Program		Mothers served in maternity medical clinics		Children served in child health clinics				Children served by child welfare programs	
	Number	Rate per 10,000 children	Number	Rate per 1,000 live births	Infants		Other children		Number	Rate per 10,000 under 21
		Bf679		Bf680	Bf681 ¹	Bf682	Number	Rate per 1,000 infants		Number
	Thousand	Per 10,000	Number	Per 1,000	Number	Per 1,000	Number	Per 1,000	Number	Per 10,000
1937	110	24	75,193	31	127,365	66	200,022	25	—	—
1938	114	24	119,623	48	156,749	80	266,466	32	—	—
1939	127	26	125,667	51	138,280	69	277,703	33	—	—
1940	127	26	146,440	55	175,357	84	299,174	34	—	—
1941	147	30	167,002	61	185,139	85	314,238	36	—	—
1942	133	27	161,367	52	185,562	78	307,344	33	—	—
1943	115	24	147,599	46	185,729	67	264,817	28	—	—
1944	125	27	129,596	43	169,799	66	266,774	26	—	—
1945	130	27	116,961	31	169,965	67	256,815	24	241,000	51
1946	155	32	130,909	37	187,045	75	275,969	25	250,000	51
1947	175	34	151,117	38	245,514	69	320,263	28	255,000	50
1948	195	37	152,691	41	263,819	81	379,472	31	260,000	50
1949	207	39	168,234	45	294,998	91	398,582	31	265,000	50
1950	214	39	175,270	47	302,892	94	420,334	31	270,000	49
1951	229	41	188,541	48	402,279	120	580,344	41	277,000	50
1952	238	42	180,265	45	433,911	126	576,260	41	279,000	49
1953	252	43	177,580	44	411,907	117	591,959	41	282,000	48
1954	271	45	190,667	47	446,772	123	576,966	39	289,000	48
1955	278	45	188,988	46	448,058	121	576,896	39	289,400	46
1956	296	46	225,624	—	517,243	139	769,102	—	297,500	46
1957	313	47	240,630	—	557,801	144	768,476	—	318,000	48
1958	325	47	250,630	58	607,291	140	812,371	—	328,300	48
1959	339	49	235,638	54	629,258	145	854,210	—	344,500	49
1960	355	49	253,638	59	614,883	142	865,494	—	382,500	54
1961	372	50	276,771	64	598,736	138	898,919	—	403,900	56
1962	385	50	267,741	63	606,015	143	893,745	—	422,800	56
1963	396	51	271,084	65	593,362	142	915,868	—	457,300	60
1964	423	54	276,187	70	605,480	147	902,013	—	487,500	62
1965	—	—	—	—	—	—	—	—	531,600	67
1966	437	54	282,432	77	679,688	184	1,084,318	—	573,800	71
1967	476	60	366,373	98	603,661	161	1,028,225	—	607,000	74
1968	475	59	292,000	83	591,000	169	1,019,000	—	656,000	80
1969	483	59	346,000	97	515,000	144	871,000	—	694,000	85
1970	492	61	331,499	89	622,708	167	851,081	—	652,000	80

Note appears at end of table

(continued)

TABLE Bf679-688 Public child health and welfare service programs – children and mothers served: 1937-1970
Continued

¹ Prior to 1956, includes antepartum service only.

Sources

Series Bf679-686, 1937-1969, U.S. Children's Bureau, *Statistical Series*, and U.S. Social Security Administration, unpublished data; 1970, U.S. Health Services Administration, unpublished data. Series Bf687-688, U.S. Social and Rehabilitation Service, *Child Welfare Statistics* (1969), and *Children Served by Public Welfare Agencies and Voluntary Child Welfare Agencies and Institutions*, Reports CW-1 and E-9.

Documentation

Series Bf679-680. Data represent general coverage of state reports: 1937-1947, for services administered or financed in whole or in part by official state agencies under the Social Security Act; 1948-1949, for services provided or purchased by official state agencies exclusive of prediagnostic services; 1950-1956, for "physician's services" consisting of clinic service, hospital care, convalescent home care, and other services by physicians. Data for 1937 are for forty-five states, the District of Columbia, Alaska, Hawai'i

(Georgia, Louisiana, and Oregon not participating). For 1938, Georgia and Oregon are also included and, for 1939, Louisiana is included (except for first quarter). Puerto Rico was excluded beginning with the last half of 1940, and the Virgin Islands were excluded beginning the last half of 1947; prior to these dates, they were included. Arizona, which did not participate from 1950 through 1956, is excluded for those years. Rates for each year are based on the population of states participating in those years.

Series Bf679-685. Calendar year basis through 1964; fiscal year thereafter.

Series Bf681-686. Maternal and child health programs include services administered or supervised by official state health agencies. Reports were received each year except 1941 from forty-eight states, the District of Columbia, Alaska, and Hawai'i. Missouri was not participating in 1941. Puerto Rico is included beginning with 1940, and the Virgin Islands are included beginning with the last half of 1947.

Series Bf686. Not computed after 1956 because older children were included in the program.

TABLE Bf689-707 Food programs – participation, benefits, payments, and costs: 1962-1999

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Food Stamps			Women, Infants, and Children program			Federal cost of school food programs		
	Average number of persons participating	Annual average benefit	Annual average monthly benefit per person	Total participation	Program costs	Average monthly benefit per person	Cash payments	Commodity costs	Total costs
	Bf689	Bf690	Bf691	Bf692	Bf693	Bf694	Bf695	Bf696	Bf697
	Thousand	Thousand dollars	Dollars	Thousand	Million dollars	Dollars	Million dollars	Million dollars	Million dollars
1962	143	13,153	7.66	—	—	—	—	—	—
1963	226	18,639	6.87	—	—	—	—	—	—
1964	367	28,643	6.50	—	—	—	—	—	—
1965	424	32,494	6.39	—	—	—	—	—	—
1966	864	64,781	6.25	—	—	—	—	—	—
1967	1,447	105,455	6.07	—	—	—	—	—	—
1968	2,211	172,982	6.52	—	—	—	—	—	—
1969	2,878	228,587	6.62	—	—	—	310.5	272.0	582.5
1970	4,340	550,806	10.58	—	—	—	412.2	265.2	677.4 ¹
1971	9,368	1,522,904	13.55	—	—	—	642.8	277.3	920.1
1972	11,103	1,794,875	13.47	—	—	—	853.9	312.1	1,166.0
1973	12,190	2,102,133	14.37	—	—	—	1,007.5	331.0	1,338.5
1974	12,896	2,725,988	17.62	88	10.4	15.68	1,193.7	316.1	1,509.8
1975	17,063	4,386,144	21.42	344	89.3	18.58	1,498.0	423.5	1,921.5
1976	18,557	5,310,133	23.85	520	142.6	19.60	1,743.7	418.6	2,162.3
1977	17,058	5,057,700	24.71	848	255.9	20.80	1,868.9	540.8	2,409.7
1978	16,044	5,165,209	26.83	1,181	379.6	21.99	2,124.8	542.9	2,667.7
1979	17,710	6,484,538	30.51	1,483	525.4	24.09	2,348.3	744.9	3,093.2
1980	21,077	8,685,521	34.34	1,914	727.7	25.43	2,712.4	904.5	3,616.9
1981	22,430	10,615,964	39.44	2,119	871.6	27.84	2,813.1	895.2	3,708.3
1982	21,716	10,205,799	39.18	2,189	948.8	28.83	2,521.0	757.0	3,278.0
1983	21,630	11,153,867	42.98	2,537	1,126.0	29.62	2,763.0	800.9	3,563.9
1984	20,858	10,696,100	42.74	3,045	1,388.1	30.58	2,887.7	827.4	3,715.1
1985	19,910	10,744,200	44.99	3,138	1,489.3	31.69	2,973.5	801.3	3,774.8
1986	19,428	10,604,950	45.49	3,312	1,582.9	31.82	3,136.4	821.9	3,958.3
1987	19,113	10,500,344	45.78	3,429	1,679.6	32.68	3,259.4	888.2	4,147.6
1988	18,644	11,149,051	50.00	3,593	1,797.5	33.28	3,417.2	813.7	4,230.9
1989	18,766	11,676,436	51.85	4,118	1,910.9	30.14	3,537.2	763.9	4,301.1
1990	20,038	14,184,028	59.01	4,517	2,122.2	30.20	3,829.4	619.7	4,449.1
1991	22,629	17,307,235	63.89	4,893	2,301.1	29.84	4,229.5	699.3	4,928.8
1992	25,403	20,899,531	68.57	5,403	2,596.7	30.21	4,662.7	707.2	5,369.9
1993	26,982	22,005,194	67.96	5,921	2,825.5	29.76	4,968.8	668.4	5,637.2
1994	27,476	23,749,813	69.01	6,477	3,169.5	29.91	5,267.6	725.3	5,992.9
1995	26,619	22,765,849	71.27	6,894	3,441.4	30.41	5,531.8	693.6	6,225.4
1996	25,533	22,440,298	73.23	7,188	3,695.3	31.19	5,796.9	693.0	6,489.9
1997	22,851	19,555,263	71.31	7,407	3,844.1	31.67	6,165.7	619.7	6,785.4
1998	19,787	16,879,929	71.09	7,367	3,889.9	31.75	6,390.7	728.2	7,118.9
1999	—	—	—	7,311	3,945.7	32.53	6,675.6	704.9	7,380.5

Note appears at end of table

(continued)

TABLE Bf689-707 Food programs – participation, benefits, payments, and costs: 1962-1999 *Continued*

Year	National School Lunch program			School Breakfast program			Special Milk program: half-pints served	Summer Food Service program: meals served	Child and Adult Care Food program	
	Average monthly participation	Meals served	Percentage of free and reduced-price meals served	Total monthly participation	Meals served	Percentage of free and reduced-price meals served			Meals served	Percentage of free and reduced-price meals
	Bf698	Bf699	Bf700	Bf701	Bf702	Bf703			Bf704	Bf705
Million	Million	Percent	Million	Million	Percent	Million	Million	Million	Percent	
1962	—	—	—	—	—	—	—	—	—	—
1963	—	—	—	—	—	—	—	—	—	—
1964	—	—	—	—	—	—	—	—	—	—
1965	—	—	—	—	—	—	—	—	—	—
1966	—	—	—	—	—	—	—	—	—	—
1967	—	—	—	—	—	—	—	—	—	—
1968	—	—	—	—	—	—	—	—	—	—
1969	19.4	3,368.2	15.1	0.22	39.7	71.0	2,944.4	2.2	8	78.2
1970	22.4	3,565.1	20.7	0.45	71.8	71.5	2,901.9	8.2	42	80.3
1971	24.1	3,848.3	26.1	0.80	125.5	76.3	2,570.0	29.0	81	83.5
1972	24.4	3,972.1	32.4	1.04	169.3	78.5	2,498.2	73.5	103	85.4
1973	24.7	4,008.8	35.0	1.19	194.1	83.4	2,560.7	65.4	118	87.1
1974	24.6	3,981.6	37.1	1.37	226.7	82.8	1,425.9	63.6	163	88.6
1975	24.9	4,063.0	40.3	1.82	294.7	82.1	2,139.0	84.3	224	87.6
1976	25.6	4,147.9	43.1	2.20	353.6	84.2	2,206.8	104.8	254	80.6
1977	26.2	4,250.0	44.8	2.49	434.3	85.7	2,204.4	170.4	311	82.6
1978	26.7	4,294.1	44.4	2.80	478.8	85.3	1,990.8	120.3	339	81.8
1979	27.0	4,357.4	43.6	3.32	565.6	84.1	1,821.1	121.8	382	79.8
1980	26.6	4,387.0	45.1	3.60	619.9	85.2	1,794.8	108.2	431	82.6
1981	25.8	4,210.6	48.6	3.81	644.2	86.9	1,533.1	90.3	547	91.0
1982	22.9	3,755.0	50.2	3.32	567.4	89.3	201.9	68.2	493	85.5
1983	23.0	3,803.3	51.7	3.36	580.7	90.3	189.0	71.3	536	84.4
1984	23.4	3,826.2	51.0	3.43	589.2	89.7	174.4	73.8	591	84.0
1985	23.6	3,890.1	49.1	3.44	594.9	88.6	166.9	77.2	640	83.7
1986	23.7	3,942.5	49.1	3.50	610.6	88.7	161.8	77.1	678	83.6
1987	23.9	3,939.9	48.6	3.61	621.5	88.4	162.3	79.9	725	83.2
1988	24.2	4,032.9	47.4	3.68	642.5	87.5	193.6	80.3	792	83.2
1989	24.3	4,004.9	47.2	3.81	658.4	86.8	188.7	86.0	866	83.5
1990	24.1	4,009.1	48.3	4.07	707.5	86.7	181.2	91.2	966	83.9
1991	24.2	4,050.9	50.4	4.44	772.1	87.3	177.0	96.2	1,063	84.5
1992	24.6	4,101.9	53.0	4.92	852.6	88.0	174.4	107.4	1,182	85.4
1993	24.9	4,137.7	54.8	5.36	923.6	87.9	167.3	113.4	1,298	85.4
1994	25.3	4,201.8	55.9	5.83	1,001.6	87.4	158.8	116.9	1,414	85.3
1995	25.7	4,253.4	56.4	6.32	1,078.9	86.8	151.4	120.3	1,508	85.2
1996	25.9	4,313.2	56.9	6.58	1,125.7	86.5	144.3	125.4	1,546	85.2
1997	26.3	4,409.0	57.6	6.92	1,191.2	86.5	140.6	128.5	1,572	85.3
1998	26.6	4,424.9	57.8	7.14	1,221.0	86.1	133.6	134.8	1,602	84.7
1999	26.9	4,513.2	57.6	7.37	1,267.6	85.4	126.9	134.6	1,637	84.2

¹ Corrected from original source using sum of series Bf695-696.

Sources

Series Bf689-691. U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Table 9.H.1, p. 344. The original source for the series is the U.S. Department of Agriculture (USDA), Food and Consumer Service.

Series Bf692-707. Internet site for the USDA, Food and Nutrition Service.

More detail on these programs and others and recent updates have been posted at the US Food and Nutrition Service Internet site. See also U.S. Food and Nutrition Service, "Annual Historical Review of FNS Programs."

Documentation

The U.S. Food and Nutrition Service administers a series of programs designed to provide food to low-income persons. These include food stamp, school meals, and summer feeding programs, programs to feed women, infants, and children and the elderly, and so on.

Food Stamp Program

The Food Stamp program was designed to provide low-income persons with a means for obtaining an adequate diet. Under this program, single per-

sons and individuals living in households meeting nationwide standards for income and assets may receive coupons redeemable for food and for garden seeds and plants. To qualify for the program, as of 1996, a household must have (1) less than \$2,000 in disposable assets (\$3,000 if one member is aged 60 or older), (2) gross income below 130 percent of the poverty guidelines for the household size, and (3) net income, after subtracting the deductions, of less than 100 percent of the poverty guidelines. Households with a person aged 60 or older, or a disabled person receiving Supplemental Security Income (SSI), Social Security (Old-Age, Survivors, and Disability Insurance, or OASDI), state general assistance or veterans' disability benefits (or interim disability assistance pending approval of any of the previously mentioned programs) may have gross income exceeding 130 percent of the poverty guidelines if the income is lower than 100 percent of the poverty guidelines after subtracting the preceding deductions. One- and two-person households in which all members receive Temporary Assistance to Needy Families (TANF) or SSI are categorically eligible for food stamps without meeting these income criteria.

Initiated on a pilot basis in 1961, the Food Stamp Act of 1964 formally established the program, with twenty-two states participating. Currently,

(continued)

TABLE Bf689-707 Food programs – participation, benefits, payments, and costs: 1962-1999 *Continued*

the Food Stamp program is in effect in the fifty states, the District of Columbia, Guam, and the Virgin Islands. Since July 1982, Puerto Rico has been receiving a block grant for nutrition assistance instead of participating in the Food Stamp program. Authorization for this program extended through September 30, 2002.

The Food Stamp program is administered nationally by the U.S. Food and Consumer Service and operates through local welfare offices and the Nation's food marketing and banking systems. Since August 1, 1980, persons receiving or applying for SSI payments have been permitted to apply for food stamps through local Social Security district offices. The federal government, through general revenues, pays the entire cost of the food stamp benefits, but federal and state agencies share administrative costs.

Originally, food stamp coupons were purchased by participants. The difference between the face value of the coupons and the amount paid by the participant was known as the bonus value. Effective January 1, 1979, the purchase requirement was eliminated, and participants could directly receive the bonus.

Between 1974 and 1979, SSI recipients were made ineligible for food stamps in Massachusetts, Wisconsin, California, and selected counties in New York and Virginia because those areas supplemented SSI payments in amounts that included the value of food stamps. As of 1983 and 1992, SSI recipients were returned to the Food Stamp program in Massachusetts and Wisconsin, respectively, when these states chose to stop including a value for food stamps in the SSI supplement.

The U.S. Food and Nutrition Service has several additional programs to strengthen the nutritional safety net beyond those included here. These include an emergency food assistance program to provide commodity foods to states for distribution to supplement food stocks of households, soup kitchens, and food banks; and food distribution programs for women, infants, children, the elderly, Puerto Ricans, and Native Americans. More information can be found at the Internet sites listed in the sources.

After July 1, 1982, residents of Puerto Rico are not included in the data.

Other Food Programs

Series Bf692-694. The Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) is designed to improve the health of low-income pregnant women, breastfeeding and nonbreastfeeding new mothers, and infants and children up to 5 years old. WIC provides supplemental foods, nutrition education, and access to health services. Participants redeem vouchers for specific foods that contain nutrients frequently lacking in the diet of low-income mothers and children.

Series Bf695-705. The School Food programs include the National School Lunch program, School Breakfast program, and Special Milk program. The National School Lunch program and the School Breakfast program provide funding and commodity foods to nonprofit food services in elementary and secondary schools, and in residential child care facilities. Depending on income, students qualify for free or reduced-price meals, which must meet federal nutritional guidelines. The Special Milk program as of 1999 furnishes milk to all children in approved schools, camps, and child care institutions that have no federally supported meal program. The federal cost of the school food programs does not include payments for the federal share of state administrative expenses. The commodity food costs represent the value of food distributed.

Series Bf698-700. The average monthly participation in the National School Lunch program is a nine-month average covering October through May plus September. Total lunches served includes free and reduced-price lunches, which are determined by the income of the household of the recipient, and full-price lunches for students from higher income households.

Series Bf701-703. The total monthly participation in the School Breakfast program is a nine-month average covering October through May plus September.

Series Bf704. The Omnibus Budget Reconciliation Act of 1981 limited School Milk program participation to schools and institutions that do not participate in other child nutrition programs. The Act became effective in fiscal year 1982. Public Law 99-500 in 1987 (effective October 1988) permitted the National School Lunch program or the School Breakfast program to offer milk to pre-kindergarten and kindergarten children attending half-day sessions who have no access to meal service programs.

Series Bf705. For 1969-1975, data are for the summer component of the Special Food Service program. There was a transitional quarter between 1976 and 1977, which was the interim between the old definition of the fiscal year (July through June) and the current one (October through September). During that period 198 million meals were served.

Series Bf706-707. The Child and Adult Care Food program supplies commodity foods and reimburses for meals in child and adult day care centers, and family and group day care homes for children. The 1969-1975 data are for the year-round component of the Special Food Service program.

TABLE Bf708-716 Low-Income Home Energy Assistance program – obligations and households receiving assistance: 1982-1996

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Estimated home energy assistance obligations for				Households receiving assistance for				
	Heating	Cooling	Energy crisis intervention	Weatherization and energy-related home repair	Heating	Cooling	Energy crisis intervention		Weatherization and energy-related home repair
							Winter	Summer	
	Bf708	Bf709	Bf710	Bf711	Bf712	Bf713	Bf714	Bf715	Bf716
Dollars	Dollars	Dollars	Dollars	Number	Number	Number	Number	Number	
1982	1,124,476,630	51,498,572	138,941,133	136,195,046	5,990,176	1,075,061	707,123	—	430,830
1983	1,343,267,155	33,020,830	191,771,756	195,463,612	6,414,448	529,036	972,894	25,342	482,620
1984	1,372,772,591	32,374,067	225,795,893	186,662,906	6,443,637	537,598	963,743	28,841	180,748
1985	1,466,721,924	29,135,118	191,407,205	227,096,051	6,545,616	511,333	857,809	27,196	217,864
1986	1,351,903,078	35,620,945	199,178,003	193,420,839	6,359,924	535,553	951,945	114,194	191,316
1987	1,280,302,113	29,581,262	197,719,071	220,419,633	6,495,409	366,721	1,060,425	60,797	172,372
1988	1,145,560,993	21,151,405	190,046,023	170,292,505	5,827,481	309,044	981,775	57,750	156,770
1989	1,017,024,757	12,341,113	187,442,779	147,952,928	5,595,268	126,977	890,616	20,384	142,584
1990	1,030,150,903	25,007,676	188,844,316	133,479,484	5,459,631	358,823	1,058,067	37,340	148,104
1991	1,098,583,280	27,416,776	220,795,517	129,279,737	5,769,346	374,483	1,004,634	39,399	127,587
1992	990,903,081	22,645,002	197,218,623	134,816,010	5,906,292	384,468	950,275	25,570	106,066
1993	948,596,196	22,274,975	183,189,522	146,444,590	5,282,993	143,279	956,435	47,169	111,295
1994	1,062,552,111	24,862,636	225,583,805	214,342,289	5,663,040	145,684	1,127,832	24,532	126,086
1995	884,846,144	43,883,481	212,713,182	159,076,150	5,147,619	341,041	932,263	77,915	102,817
1996	696,801,144	17,597,204	167,622,219	135,835,358	3,974,152	128,538	804,560	59,992	91,503

Source

U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Tables 9J1 and 9J3, pp. 346, 350; a legislative history of the Low-Income Home Energy Assistance program (LIHEAP) is on pp. 128-9.

Documentation

Under LIHEAP, block grants administered by Health and Human Services (HHS) are provided to the states to assist eligible households to meet home energy expenses. In addition to the fifty states, grants were provided in fiscal year 1995 to the District of Columbia, the Commonwealth of Puerto Rico, five insular areas, and 123 Indian tribes or tribal organizations.

The unit of eligibility for energy assistance is the household, defined as any individual or group of individuals who are living together as one economic unit for which residential energy is customarily purchased in common, either directly or through rent. Under the Act, households can be eligible for assistance on the basis of income, or are categorically eligible if they already receive Aid to Families with Dependent Children (replaced by the Temporary Assistance for Needy Families program), Supplemental Security Income, food stamps, or need-tested veterans' benefits. To be eligible on the basis of income, households must have incomes less than either 150 percent of the income guidelines or 60 percent of the state's median income, whichever is

greater. As of 1995, no household may be excluded from eligibility on the basis of income alone if household income is less than 110 percent of the poverty guidelines.

States make payments directly to eligible households or to home energy suppliers on behalf of eligible households. Payments can be provided in cash, fuel, or prepaid utility bills or as vouchers, stamps, or coupons that can be used in exchange for energy supplies. Payments are to vary in such a way that the highest level of assistance is furnished to households with the lowest income and the highest energy costs in relation to income, taking into account family size.

With respect to the series that are reported for the number of households receiving assistance, note that an unduplicated total of households assisted cannot be derived from the data because the same household may be included under more than one type of assistance. In addition, the data for the number of households that received heating and cooling assistance include households that received combined heating and cooling assistance in Arizona, California, and Florida, and households in Hawai'i that received assistance without differentiation between heating and cooling assistance. Further, the total number of households receiving energy crisis intervention in winter includes households that received expedited heating assistance in Maryland, Massachusetts, and New Hampshire.

TABLE Bf717-721 Vocational rehabilitation caseload and expenditures: 1921-1999

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Persons		Expenditures		
	Served	Rehabilitated	Total	Federal	State
	Bf717	Bf718	Bf719	Bf720	Bf721
	Number	Number	Thousand dollars	Thousand dollars	Thousand dollars
1921	—	523	285	93	191
1922	—	1,898	736	312	424
1923	—	4,530	1,188	525	663
1924	—	5,664	1,243	551	691
1925	—	5,825	1,187	520	668
1926	—	5,604	1,274	579	695
1927	—	5,092	1,407	631	775
1928	—	5,012	1,541	654	887
1929	—	4,645	1,490	665	825
1930	—	4,605	1,700	739	960
1931	—	5,184	2,043	933	1,110
1932	—	5,592	2,186	998	1,187
1933	—	5,613	2,176	999	1,177
1934	—	8,062	2,080	916	1,164
1935	—	9,422	2,248	1,032	1,216
1936	—	10,338	2,603	1,230	1,373
1937	—	11,091	3,319	1,513	1,806
1938	63,666	9,844	3,862	1,791	2,071
1939	63,575	10,747	3,992	1,833	2,159
1940	65,624	11,890	4,108	1,972	2,136
1941	78,320	14,576	4,711	2,282	2,429
1942	91,572	21,757	5,205	2,557	2,648
1943	129,207	42,618	5,630	2,762	2,868
1944	145,059	43,997	6,372	4,052	2,320
1945	161,050	41,925	9,856	7,135	2,720
1946	169,796	36,106	13,749	10,002	3,747
1947	170,143	43,880	19,313	14,189	5,124
1948	191,063	53,131	24,589	17,707	6,862
1949	216,997	58,020	25,819	18,216	7,603
1950	255,724	59,597	29,347	20,340	9,007
1951	231,544	66,193	30,273	21,001	9,271
1952	228,490	63,632	32,689	22,122	10,567
1953	221,849	61,308	34,583	22,948	11,636
1954	211,219	55,825	35,366	22,965	12,403
1955	209,039	57,981	38,629	23,812	14,818
1956	221,128	65,640	46,221	28,830	17,391
1957	238,582	70,940	54,282	33,648	20,634
1958	258,444	74,317	63,727	39,365	24,362
1959	280,384	80,739	71,206	43,932	27,274
1960	297,950	88,275	78,711	48,144	30,567
1961	320,963	92,501	88,150	53,898	34,252
1962	345,635	102,377	101,390	61,956	39,404
1963	368,696	110,136	113,111	69,325	43,785
1964	399,852	119,708	133,259	82,195	51,065
1965	441,332	134,859	154,140	94,713	59,427
1966	499,464	154,279	213,639	144,629	69,009
1967	569,907	173,594	303,846	225,268	78,578
1968	680,415	207,918	377,646	282,337	95,309
1969	781,614	241,390	455,865	340,858	115,007
1970	875,911	266,975	557,707	431,764	125,943
1971	1,001,660	291,272	631,000	489,000	142,000
1972	1,111,045	326,138	697,000	548,000	149,000
1973	1,176,445	360,726	730,000	572,000	158,000
1974	1,201,661	361,138	810,000	636,000	174,000
1975	1,244,338	324,039	867,000	673,000	194,000
1976	1,238,446	303,328	898,000	700,000	198,000
1977	1,204,487	291,202	956,000	733,000	223,000
1978	1,167,991	294,396	986,000	755,000	231,000
1979	1,127,551	298,325	1,063,000	813,000	250,000

(continued)

TABLE Bf717-721 Vocational rehabilitation caseload and expenditures: 1921-1999
Continued

Year	Persons		Expenditures		
	Served	Rehabilitated	Total	Federal	State
	Bf717	Bf718	Bf719	Bf720	Bf721
	Number	Number	Thousand dollars	Thousand dollars	Thousand dollars
1980	1,095,139	277,136	1,076,000	817,000	259,000
1981	1,038,232	255,881	1,118,000	850,000	268,000
1982	958,537	226,924	1,167,000	858,000	309,000
1983	938,923	216,231	1,254,000	937,000	317,000
1984	936,180	225,772	1,366,000	1,038,000	328,000
1985	931,779	227,652	1,452,000	1,100,000	352,000
1986	923,774	223,354	1,506,000	1,144,000	362,000
1987	917,482	219,616	1,649,000	1,275,000	374,000
1988	918,942	218,241	1,776,000	1,373,000	403,000
1989	928,998	220,408	1,867,000	1,446,000	421,000
1990	937,971	216,112	1,910,000	1,525,000	385,000
1991	941,771	202,831	2,092,000	1,622,000	470,000
1992	949,053	191,890	2,240,000	1,731,000	509,000
1993	1,048,527	193,994	2,241,000	1,691,000	550,000
1994	1,193,661	203,035	2,517,000	1,891,000	626,000
1995	1,250,314	209,509	2,714,000	2,054,000	660,000
1996	1,225,156	213,520	2,844,000	2,104,000	740,000
1997	1,198,231	211,502	3,046,000	2,164,000	882,000
1998	1,210,604	223,668	—	—	—
1999	1,202,286	229,829	—	—	—

Sources

Series Bf717-718. Through 1989, from U.S. Department of Education, Rehabilitation Services Administration, *Annual Report to the President and to the Congress on Federal Activities Related to the Rehabilitation Act of 1973, as amended, Fiscal Year 1990*, p. 136; 1990-1993, from the *Annual Report for the Fiscal Year 1993*, p. 262; 1994 and thereafter, from unpublished information provided by the administration.

Series Bf719-721. U.S. Bureau of the Census, *Statistical Abstract of the United States*, which reports the information from annual issues of U.S. Social and Rehabilitation Service, *Caseload Statistics of State Vocational Rehabilitation Agencies in Fiscal Years and State Vocational Rehabilitation Agency Program Data in Fiscal Years*. Annual updates are often reported in the *Statistical Abstract* before the annual reports of the administration are issued.

Documentation

The state-federal program of vocational rehabilitation assists persons with disabilities, and especially persons with severe disabilities, to reach successful employment outcomes. Persons with severe disabilities are persons whose

physical or mental impairment seriously limits one or more functional capacities in terms of an employment outcome, and whose vocational rehabilitation can be expected to require multiple vocational rehabilitation services over an extended period of time. The percentage of persons served with severe disabilities has risen from 58 percent in 1980 to 79 percent in 1997.

Series Bf717. Includes active cases accepted for rehabilitation services during the year plus active cases on hand at beginning of the year.

Series Bf718. Persons rehabilitated refers to persons who are successfully placed into gainful employment.

Series Bf719-721. These series present data on expenditures only under the basic support provisions of the Vocational Rehabilitation Act. As of 1970, federal funds were allotted to fifty-four states and territories in support of basic programs for providing vocational rehabilitation services. The federal allotment was based on population and per capita income. In 1970, expenditures were at the matching rates of 80 percent for the federal government and 20 percent for the state; in 1995 the matching rates were 78.7 and 21.3 percent, respectively.

TABLE Bf722-734 Federal employee and civil service retirement systems – annuitants: 1925-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Total	Mandatory retirement	Optional with 30 years service	Optional with less than 30 years service	Normal	Disabled	Deferred	Involuntary	Hazardous duty	Air traffic controllers	Members of Congress	Transferred from other systems	Voluntary early
	Bf722	Bf723	Bf724	Bf725	Bf726	Bf727	Bf728	Bf729	Bf730	Bf731	Bf732	Bf733	Bf734
Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number	Number
1925	11,689	9,741	—	—	—	1,948	—	—	—	—	—	—	—
1930	17,768	12,504	—	—	—	3,994	—	1,270	—	—	—	—	—
1935	48,655	23,853	4,310	—	—	9,886	—	10,606	—	—	—	—	—
1940	62,027	30,216	6,318	—	—	15,294	—	10,199	—	—	—	—	—
1945	85,011	28,904	16,388	5,766	—	23,389	2,104	8,460	—	—	—	—	—
1950	155,135	27,503	32,827	14,711	—	42,869	27,446	8,177	219	—	52	1,331	—
1955	226,180	27,718	57,716	26,081	—	61,043	43,339	7,715	1,435	—	107	1,026	—
1956	246,362	27,835	64,776	30,316	—	66,093	47,069	7,484	1,714	—	103	972	—
1957	276,408	28,766	77,354	35,546	—	73,074	51,420	7,299	1,922	—	122	905	—
1958	311,992	30,476	87,057	42,051	—	84,493	57,164	7,707	2,087	—	114	843	—
1959	338,898	32,486	92,888	47,957	—	92,723	61,538	8,095	2,263	—	161	787	—
1960	365,391	33,977	97,518	89,318	—	101,940	30,848	8,500	2,405	—	143	742	—
1961	396,523	35,608	104,160	97,854	—	112,060	33,960	9,345	2,657	—	163	716	—
1962	426,031	37,122	109,543	106,787	—	121,859	36,823	10,132	2,939	—	158	668	—
1963	453,099	38,587	114,575	115,615	—	129,834	39,517	10,877	3,287	—	187	620	—
1964	482,131	39,944	119,603	124,551	—	139,378	42,055	12,211	3,613	—	184	592	—
1965	508,731	41,134	123,840	131,831	—	149,174	44,408	13,669	3,910	—	223	542	—
1966	560,992	41,570	140,386	148,288	—	160,904	46,899	17,646	4,570	—	221	508	—
1967	580,771	41,046	143,896	155,078	—	166,928	48,912	19,319	4,869	—	235	488	—
1968	604,873	41,151	148,834	163,539	—	172,768	51,116	21,542	5,241	—	225	457	—
1969	628,572	40,819	154,042	172,915	—	178,334	53,034	23,219	5,549	—	249	411	—
1970	662,223	40,197	162,890	184,506	—	185,081	55,107	27,922	5,922	—	232	366	—
1971	711,323	39,425	172,776	197,638	—	195,732	57,716	41,147	6,302	—	254	333	—
1972	758,469	38,508	187,159	208,624	—	205,413	60,045	51,361	6,807	—	246	306	—
1973	843,520	37,230	214,097	223,861	—	219,786	62,342	78,042	7,602	28	265	267	—
1974	938,654	35,762	249,204	240,234	—	238,543	65,268	100,046	9,017	133	251	196	—
1975	989,786	34,179	262,289	242,221	—	257,774	68,784	113,813	10,071	189	287	179	—
1976	1,038,337	33,241	278,043	247,901	—	279,326	70,791	116,749	11,603	245	281	157	—
1977	1,096,561	32,194	297,838	253,510	—	306,380	72,678	120,278	12,899	322	317	145	—
1978	1,148,142	31,512	319,172	260,301	—	323,446	75,035	122,712	15,117	421	303	123	—
1979	1,189,942	29,611	342,157	266,875	—	333,230	76,460	124,543	16,074	545	341	106	—
1980	1,247,886	—	—	—	681,537	343,251	76,753	128,259	16,937	703	347	99	—
1981	1,320,439 ¹	—	—	—	738,356	347,500	78,542	97,199	17,827	987	391	4,658	34,979
1982	1,357,687	—	—	—	769,916	348,068	79,885	99,052	18,488	1,259	373	4,915	35,731
1983	1,388,616	—	—	—	804,236	343,457	80,753	99,819	19,081	1,478	378	3,821	35,593
1984	1,420,194	—	—	—	837,368	337,871	80,974	101,622	19,506	1,773	373	5,218	35,489
1985	1,454,206	—	—	—	876,692	331,675	80,849	101,887	19,915	2,123	377	5,503	35,185
1986	1,491,571	—	—	—	916,313	325,978	81,114	102,850	20,477	2,483	362	5,724	36,270
1987	1,504,140	—	—	—	934,269	318,436	80,172	103,638	20,917	2,850	369	5,762	37,727
1988	1,548,363	—	—	—	973,533	311,263	79,830	105,467	21,553	3,354	351	6,139	46,873
1989	1,571,418	—	—	—	1,000,986	304,571	78,761	105,929	22,105	3,760	352	6,426	48,528
1990	1,584,785	—	—	—	1,021,950	297,257	77,429	105,982	22,830	4,113	342	6,868	48,014
1991	1,614,306	—	—	—	1,054,589	289,723	76,437	106,732	23,478	4,505	346	7,398	51,098
1992	1,604,444	—	—	—	1,040,441	281,690	75,088	119,822	23,652	4,639	336	7,396	51,380
1993	1,652,667	—	—	—	1,059,486	274,401	73,297	123,056	24,042	4,828	391	7,742	85,424
1994	1,666,226	—	—	—	1,063,518	268,375	71,652	125,102	25,147	5,177	381	7,844	99,030
1995	1,703,467	—	—	—	1,077,004	263,377	70,428	128,641	26,690	5,379	404	8,320	123,224
1996	1,718,898	—	—	—	1,078,296	259,885	69,000	127,582	28,022	5,596	401	8,631	141,485
1997	1,730,952	—	—	—	1,079,935	256,595	67,319	126,619	29,196	5,753	423	8,784	156,328

¹ Data revised from original source.**Source**

Civil Service Retirement and Disability Fund Annual reports, unpublished data.

Documentation

The Office of Personnel Management is no longer required to prepare the source reports, which are not publicly available. Historical data (before 1989) are unaudited. For further information, contact the Office of Personnel Management. See also the text for Table Bf735-745.

These series combine annuitants covered under the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS).

Systematic provision for the retirement of federal civil service employees started with the original retirement act (Public Law 66-215), which was signed May 22, 1920, and initially covered about 330,000 employees in the classified civil service. The Act provided only for mandatory and disability retirement after fifteen years of service with annual annuities ranging from \$180 to \$720 based on length of service and the average salary for the ten years preceding retirement. Benefits have continued to evolve to the present time. They are now financed by both employee and government contributions to the retirement fund, and they provide benefits based on length of service and the average salary over the highest three years of pay. Additional information on the CSRS from 1921 through 1970 can be found in the text for Table Bf735-745. As of September 30, 1978, the former mandatory

TABLE Bf722-734 Federal employee and civil service retirement systems – annuitants: 1925-1997 *Continued*

separation requirement for federal employees who attain age 70 was removed. In 1979, the Office of Personnel Management began to administer the program, which was replaced by a new FERS in 1987.

As of 1999, almost all federal employees hired after 1983 are automatically included in the FERS program. The FERS provides three types of benefits: the basic Social Security benefits, a basic annuity component based on contributions by the employer and the government, and the opportunity to participate in a Thrift Savings Plan, which is essentially a tax-deferred savings and investment plan similar to the 401(k) for corporations. Generally, the basic annuity component of FERS is 1 percent of the employee's "high-3" year's average pay, multiplied by years of service. If the employee retires at age 62, or later, with at least twenty years of service, a factor of 1.1 percent is used rather than 1 percent. The tax-deferred savings plan allows employees to contribute up to 10 percent of their income. The government automatically contributes to the employee's account an amount equal to 1 percent of basic pay, and, if the employee contributes, the government matches the contribution up to a maximum of 4 percent of the employee's salary to the plan. A special retirement supplement designed to approximate the retiree's eventual Social Security benefits may be provided to compensate the retiree for any lack of Social Security benefits for those retiring prior to reaching the age of 62. Retirees may be eligible for the supplement if they retired after the minimum retirement age with thirty years of service, at age 60 with twenty years of service, or upon involuntary retirement. Law enforcement officers and firefighters who retire at age 50 with twenty years of service or at any age with twenty-five years of service are also eligible for the supplement. This supplement is also payable, after attainment of the minimum retirement age, to discontinued service and involuntary retirees as well as to members of the Senior Executive Service (SES) who are removed from SES status and who retire at the age of 50 with twenty years of service or at any age with twenty-five years of service.

Employees hired prior to 1984 are typically included under the CSRS, although they have the option to transfer to the FERS. Many of the features of the CSRS plans are the same as in 1973, although as of September 30, 1978, mandatory retirement was eliminated for federal employees. CSRS-covered employees may also participate in the Thrift Savings Plan, but their participation is limited to 5 percent of salary and no government contribution is made.

As of 1997, there are two requirements that all retiring employees must meet for the CSRS. First, the employee must have at least five years of civilian service with the federal government. Second, unless retiring because of total disability, the employee must have been employed under the CSRS for at least one year of the last two preceding final separation. There is no "1-out-of-2" requirement under FERS as there is under CSRS. Employees are eligible for immediate retirement if they meet these general requirements and any combination of the following age/service requirements. (1) Employees may elect optional voluntary early retirement, series Bf734, at a minimum age of 62 with at least five years of service; at age 60 with at least twenty years of service; or at age 55 with thirty years of service. (2) Law enforcement officers may retire at age 50 with twenty years of service. (3) Employees at any age with at least twenty-five years of service may retire when the agency is undergoing a major reduction in force. In the latter category, benefits may be reduced.

Series Bf722. For 1920-1979, equals the sum of series Bf723-725 and Bf727-733. For 1980-1997, equals the sum of series Bf726-734.

Series Bf723-726. The employees who retired under the "normal" rules are reported from 1920 to 1979 in three categories: mandatory retirement, optional retirement with thirty or more years of service, and optional retirement with less than thirty years of service. Starting with 1980, these three series were replaced by a single series for normal retirement (series Bf726). In 1979, when both sets of series were reported, series Bf723-725 summed to series Bf726. Series Bf723 ends in 1979 because the mandatory retirement age requirement was abolished.

Series Bf727. Employees of any age with at least five years of service may qualify for disability retirement if they become disabled for useful and efficient service.

Series Bf728. An employee who meets the five-year service requirement for retirement and who is separated from the federal service for any reason before meeting the age requirement for a general annuity may receive a deferred annuity that is payable upon attaining age 62. For 1945-1955, the information for the series was listed in the original source under the title "optional retirement with 5 years service at age 62."

Series Bf729. Employees age 50 or older with at least twenty years of service, or at any age with at least twenty-five years of service, may qualify for discontinued service retirement with a reduced annuity in cases of involuntary separation from the federal service. Involuntary separations include any separation against the will and without the consent of the employee, other than "for cause" for misconduct or delinquency. The most common cause of an involuntary separation was a reduction in force. Employees who decline "reasonable offers" of other positions are not eligible for discontinued service annuities. A reasonable offer is defined as the offer of another position in your agency and commuting area for which you are qualified and that is no more than two grades or pay levels below your current grade or pay level.

Series Bf730-733. There are several categories of federal employees who operate under special retirement rules, including those under hazardous duty, air-traffic controllers, members of Congress, and annuitants who were transferred from other systems. The hazardous duty series is referred to as "law enforcement and firefighters" after 1980, but the data are comparable over time.

Series Bf734. Refers to annuitants who chose voluntary early retirement. Annuitants fall under this category when they volunteer to retire when an agency undergoes a major reorganization, reduction in force, or transfer of function, and a significant percentage of the employees will be separated or reduced in pay. At that point, the head of the agency can ask the Office of Personnel Management (OPM) to permit early optional retirement for eligible employees to lessen the impact of involuntary separations and demotions. After the agency head obtains approval, workers with at least twenty-five years of service, or workers at least age 50 with twenty or more years, may retire voluntarily on an immediate annuity. The annuity is reduced by 2 percent for each year younger than age 55.

TABLE Bf735-745 Civil service retirement annuities and payments: 1921-1970¹

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Annuities					Lump-sum payments to					
	Certified	Terminated	In force		Annual value	Separated employees		Deceased employees		Deceased annuitants	
			Total	Disability		Payments	Amount paid	Payments	Amount paid	Payments	Amount paid
	Bf735	Bf736	Bf737	Bf738	Bf739	Bf740 ²	Bf741 ²	Bf742 ²	Bf743 ²	Bf744 ²	Bf745 ²
Thousand	Thousand	Thousand	Thousand	Million dollars	Thousand	Million dollars	Thousand	Million dollars	Thousand	Million dollars	
1921	7	1	6	1	4	26	0.3	—	—	—	—
1922	2	—	8	1	4	71	2.2	—	—	—	—
1923	3	2	9	1	5	58	2.8	—	—	—	—
1924	2	(Z)	11	2	6	45	2.9	—	—	—	—
1925	2	1	12	2	6	37	2.7	—	—	—	—
1926	2	1	13	2	7	34	3.4	—	—	—	—
1927	3	2	14	3	10	32	3.9	—	—	—	—
1928	3	2	15	3	11	28	3.8	—	—	—	—
1929	3	1	17	4	12	26	4.1	—	—	—	—
1930	3	2	18	4	13	28	5.0	—	—	—	—
1931	7	2	23	5	22	24	4.2	—	—	—	—
1932	5	2	26	6	24	21	3.9	—	—	—	—
1933	9	2	33	7	32	17	4.8	—	—	—	—
1934	14	2	45	9	44	22	8.0	—	—	—	—
1935	7	3	49	10	48	16	5.8	—	—	—	—
1936	6	4	51	11	50	12	2.6	3	2.7	2	1.2
1937	5	3	53	12	52	14	3.1	3	2.9	2	1.3
1938	6	3	56	13	55	18	3.8	3	3.1	2	1.4
1939	6	4	58	14	57	15	2.7	3	3.2	2	1.4
1940	7	3	62	15	60	15	2.9	3	3.7	2	1.5
1941	8	4	66	17	63	21	3.6	4	4.3	3	1.7
1942	8	5	69	18	66	46	5.6	4	3.9	3	1.7
1943	10	5	74	20	71	111	7.2	6	5.0	3	2.0
1944	10	6	78	21	76	390	21.5	9	5.2	3	2.3
1945	12	5	85	23	82	901	62.4	16	7.4	3	2.5
1946	16	5	96	27	93	—	179.8 ³	—	— ³	—	2.6
1947	22	7	111	32	103	943	178.9	17	10.4	4	3.7
1948	22	7	126	35	134	432	112.8	11	9.4	4	3.5
1949	31	9	148	39	154	229	61.4	6	3.9	5	4.7
1950	33	9	172	43	182	239	88.2	5	3.7	7	4.2
1951	36	11	197	46	206	167	64.9	4	4.0	8	3.9
1952	31	12	216	48	227	147	71.0	4	4.3	8	3.6
1953	38	13	241	52	289	136	81.4	4	5.2	8	3.8
1954	41	13	269	56	324	123	89.0	4	5.4	8	3.4
1955	42	14	297	61	358	101	73.3	4	5.7	8	3.6
1956	47	17	327	66	441	164	84.2	4	6.0	8	3.6
1957	61	19	369	73	516	184	99.3	4	6.7	8	3.7
1958	70	21	418	84	635	199	114.7	4	7.4	9	3.9
1959	81	23	476	93	723	144	95.4	4	7.3	9	3.7
1960	65	26	515	102	792	153	114.2	4	7.8	9	3.6
1961	72	28	559	112	883	131	103.7	4	8.7	9	3.6
1962	73	30	602	122	975	137	108.6	4	8.7	11	6.2
1963	73	32	643	130	1,127	131	105.8	4	9.0	13	6.1
1964	79	34	688	139	1,240	128	108.2	4	9.7	16	6.0
1965	78	37	729	149	1,354	121	112.5	5	10.2	15	7.3
1966	105	38	796	161	1,688	129	139.2	5	11.2	15	7.5
1967	77	42	831	167	1,881	164	157.1	5	10.5	16	7.6
1968	83	42	872	173	2,089	190	160.1	5	12.0	18	8.5
1969	86	48	910	178	2,315	207	198.8	5	12.3	15	8.2
1970	99	50	959	185	2,660	215	197.5	5	12.8	19	10.0

(Z) Fewer than 500 annuities.

¹ Years ending June 30.² Deceased employees and deceased annuitants included with separated employees through 1935.³ Amount paid to beneficiaries of deceased employees included with amount paid to separated employees.**Source**U.S. Civil Service Commission, *Civil Service Retirement, Federal Employees Group Life Insurance, Federal Employees Health Benefits, retired Federal Employees Health Benefits*, various annual issues.**Documentation**

The original retirement act (Public Law 66-215) was signed May 22, 1920, and initially covered about 330,000 employees in the classified civil service. The Act provided only for mandatory and disability retirement after fifteen years of service with annual annuities ranging from \$180 to \$720 based on length of service and the average salary for the ten years preceding retirement. The average annuity in the year following enactment was \$568.

At the time these data were collected in the early 1970s, the retirement law in effect (passed in 1973) provided optional retirement on full annuity at age 55 with thirty years of service, age 60 with twenty years of service, or age 62

TABLE Bf735-745 Civil service retirement annuities and payments: 1921-1970 *Continued*

with five years of service; disability retirement was permitted at any age with five years of service; involuntary retirement at any age after twenty-five years of service, or at age 50 with twenty years of service. Deferred annuities were payable at age 62 with five years of service. Mandatory retirement was age 70 with fifteen years of service, and the average salary was the highest three years of salary. Employees contributed 7 percent of their pay to the retirement system. The annuity formula provided 1.5 percent of average salary for the first five years service, 1.75 percent for the next five years, and 2 percent for any remaining service, up to a maximum of 80 percent of average salary. Disability annuitants received the greater of the preceding computation or a guaranteed minimum of 40 percent of average salary or regular formula using service projected to age 60, whichever was less. The law also contained special hazardous duty positions for legislative branch employees. About 2.7 million employees were covered by the system, and the average annual annuity in 1970 was \$4,920. For a more detailed depiction of timing of the major changes in the provisions of the Civil Service Retirement System between 1920 and 1970, see *Historical Statistics of the United States* (1975), pp. 336-7.

Lump-sum payments or refunds are paid to persons leaving the federal service and withdrawing contributions and to survivors of deceased employees and of deceased annuitants. In the case of deceased employees with no

survivor annuity payable, accumulated deductions (contributions) are paid. In the case of deceased annuitants whose annuity paid has not equaled contributions, the unexpended balance is paid.

These series from the previous edition of *Historical Statistics of the United States* could not be updated owing to changes in the retirement systems for federal employees that creates problems with data comparability. See Table Bf722-734 for data on the number of annuitants since 1925, as well as descriptions of the modern retirement system. As of 1999, almost all federal employees hired after 1983 are automatically included in the Federal Employee Retirement System (FERS) program.

Series Bf735, annuities certified. Represents the number of employee and survivor annuitants added to the roll during the year.

Series Bf736, annuities terminated. Represents the employee and survivor annuitants dropped from the roll during the year; it is derived by adding the prior year's number in force to the current number certified and subtracting the current number in force.

Series Bf737, annuities in force. Represents total employee and survivor annuitants in active annuity status as of June 30. The annual value is the average monthly annuity as of June 30 projected to an annual basis.

TABLE Bf746-761 Railroad retirement benefits - number and amount, by type of beneficiary: 1937-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Fiscal year	Retirement and survivor monthly benefits awarded												Monthly benefits in current payment status						Benefit payments				Total lump-sum survivor payments Bf761 Million dollars								
	Railroad employees				Recipients				Total				Retirees		Spouse		Survivors		Lump-sum death benefits awarded		Total			Retirement annuities and pensions		Spouse annuities		Total survivor annuities			
	Thousand	Bf746	Thousand	Bf747	Bf748	Number	Bf749	Number	Bf750	Number	Bf751	Number	Bf752	Number	Bf753	Number	Bf754	Number	Bf755	Number	Bf756	Number		Bf757	Million dollars	Bf758	Million dollars	Bf759	Million dollars	Bf760	Million dollars
1937	1,279	7	8,000	7,000	7,000	7,000	7,000	7,000	7,000	(Z)								(Z)				5.0	4.0								
1938	1,093	117	110,000	107,000	107,000	107,000	107,000	107,000	107,000	2,000	108,000	108,000	107,000	107,000	107,000	1,000	1,000	1,000	1,000	1,000	1,000	83.0	82.0								
1939	1,151	163	38,000	35,000	35,000	35,000	35,000	35,000	35,000	3,000	132,000	132,000	130,000	130,000	130,000	15,000	15,000	15,000	15,000	15,000	107.0	104.0									
1940	1,195	173	25,000	23,000	23,000	23,000	23,000	23,000	23,000	2,000	144,000	144,000	141,000	141,000	141,000	3,000	3,000	3,000	3,000	3,000	114.0	111.0									
1941	1,322	182	22,000	21,000	21,000	21,000	21,000	21,000	21,000	2,000	153,000	153,000	150,000	150,000	150,000	3,000	3,000	3,000	3,000	3,000	122.0	117.0									
1942	1,470	186	18,000	16,000	16,000	16,000	16,000	16,000	16,000	1,000	157,000	157,000	153,000	153,000	153,000	4,000	4,000	4,000	4,000	4,000	127.0	122.0									
1943	1,591	191	17,000	16,000	16,000	16,000	16,000	16,000	16,000	1,000	160,000	160,000	156,000	156,000	156,000	4,000	4,000	4,000	4,000	4,000	131.0	124.0									
1944	1,670	197	19,000	18,000	18,000	18,000	18,000	18,000	18,000	1,000	164,000	164,000	160,000	160,000	160,000	4,000	4,000	4,000	4,000	4,000	135.0	128.0									
1945	1,680	210	22,000	21,000	21,000	21,000	21,000	21,000	21,000	1,000	171,000	171,000	167,000	167,000	167,000	4,000	4,000	4,000	4,000	4,000	143.0	133.0									
1946	1,622	224	28,000	27,000	27,000	27,000	27,000	27,000	27,000	1,000	185,000	185,000	181,000	181,000	181,000	4,000	4,000	4,000	4,000	4,000	154.0	143.0									
1947	1,598	265	63,000	29,000	29,000	29,000	29,000	29,000	29,000	34,000	231,000	231,000	194,000	194,000	194,000	37,000	37,000	37,000	37,000	37,000	173.0	159.0									
1948	1,558	376	121,000	43,000	43,000	43,000	43,000	43,000	43,000	78,000	320,000	320,000	218,000	218,000	218,000	102,000	102,000	102,000	102,000	102,000	225.0	188.0									
1949	1,403	427	67,000	36,000	36,000	36,000	36,000	36,000	36,000	31,000	356,000	356,000	234,000	234,000	234,000	122,000	122,000	122,000	122,000	122,000	283.0	234.0									
1950	1,421	461	65,000	38,000	38,000	38,000	38,000	38,000	38,000	27,000	387,000	387,000	251,000	251,000	251,000	137,000	137,000	137,000	137,000	137,000	302.0	248.0									
1951	1,476	484	57,000	32,000	32,000	32,000	32,000	32,000	32,000	24,000	408,000	408,000	261,000	261,000	261,000	147,000	147,000	147,000	147,000	147,000	317.0	259.0									
1952	1,429	568	137,000	30,000	30,000	30,000	30,000	30,000	30,000	21,000	503,000	503,000	268,000	268,000	268,000	154,000	154,000	154,000	154,000	154,000	394.0	296.0									
1953	1,405	609	77,000	33,000	33,000	33,000	33,000	33,000	33,000	20,000	531,000	531,000	279,000	279,000	279,000	91,000	91,000	91,000	91,000	91,000	460.0	324.0									
1954	1,250	638	77,000	36,000	36,000	36,000	36,000	36,000	36,000	22,000	562,000	562,000	294,000	294,000	294,000	169,000	169,000	169,000	169,000	169,000	512.0	362.0									
1955	1,239	696	106,000	38,000	38,000	38,000	38,000	38,000	38,000	47,000	616,000	616,000	310,000	310,000	310,000	107,000	107,000	107,000	107,000	107,000	550.0	376.0									
1956	1,220	730	89,000	38,000	38,000	38,000	38,000	38,000	38,000	31,000	651,000	651,000	323,000	323,000	323,000	114,000	114,000	114,000	114,000	114,000	601.0	396.0									
1957	1,150	757	83,000	37,000	37,000	37,000	37,000	37,000	37,000	26,000	679,000	679,000	336,000	336,000	336,000	119,000	119,000	119,000	119,000	119,000	678.0	455.0									
1958	984	798	92,000	42,000	42,000	42,000	42,000	42,000	42,000	29,000	710,000	710,000	350,000	350,000	350,000	126,000	126,000	126,000	126,000	126,000	721.0	482.0									
1959	949	824	94,000	44,000	44,000	44,000	44,000	44,000	44,000	28,000	746,000	746,000	369,000	369,000	369,000	132,000	132,000	132,000	132,000	132,000	781.0	519.0									
1960	909	873	115,000	45,000	45,000	45,000	45,000	45,000	45,000	28,000	794,000	794,000	384,000	384,000	384,000	157,000	157,000	157,000	157,000	157,000	926.0	602.0									
1961	836	906	98,000	43,000	43,000	43,000	43,000	43,000	43,000	29,000	821,000	821,000	397,000	397,000	397,000	166,000	166,000	166,000	166,000	166,000	987.0	641.0									
1962	815	932	93,000	41,000	41,000	41,000	41,000	41,000	41,000	29,000	838,000	838,000	405,000	405,000	405,000	168,000	168,000	168,000	168,000	168,000	1,027.0	661.0									
1963	790	951	94,000	42,000	42,000	42,000	42,000	42,000	42,000	30,000	861,000	861,000	416,000	416,000	416,000	173,000	173,000	173,000	173,000	173,000	1,068.0	686.0									
1964	775	970	91,000	40,000	40,000	40,000	40,000	40,000	40,000	30,000	879,000	879,000	423,000	423,000	423,000	174,000	174,000	174,000	174,000	174,000	1,096.0	704.0									
1965	753	980	85,000	36,000	36,000	36,000	36,000	36,000	36,000	29,000	889,000	889,000	426,000	426,000	426,000	174,000	174,000	174,000	174,000	174,000	1,118.0	716.0									
1966	741	1,002	104,000	35,000	35,000	35,000	35,000	35,000	35,000	28,000	921,000	921,000	429,000	429,000	429,000	197,000	197,000	197,000	197,000	197,000	1,200.0	737.0									
1967	713	1,022	103,000	50,000	50,000	50,000	50,000	50,000	50,000	29,000	950,000	950,000	445,000	445,000	445,000	200,000	200,000	200,000	200,000	200,000	1,266.0	780.0									
1968	683	1,040	115,000	60,000	60,000	60,000	60,000	60,000	60,000	29,000	989,000	989,000	470,000	470,000	470,000	204,000	204,000	204,000	204,000	204,000	1,403.0	869.0									
1969	659	1,050	114,000	55,000	55,000	55,000	55,000	55,000	55,000	33,000	1,016,000	1,016,000	489,000	489,000	489,000	208,000	208,000	208,000	208,000	208,000	1,536.0	941.0									
1970	640	1,051	99,000	48,000	48,000	48,000	48,000	48,000	48,000	27,000	1,036,000	1,036,000	501,000	501,000	501,000	210,000	210,000	210,000	210,000	210,000	1,594.0	963.0									
1971	611	—	113,832	60,067	60,067	60,067	60,067	60,067	60,067	28,951	1,067,121	1,067,121	525,712	525,712	525,712	212,075	212,075	212,075	212,075	212,075	1,909.7	1,178.5									
1972	589	—	106,362	54,260	54,260	54,260	54,260	54,260	54,260	29,271	1,084,241	1,084,241	540,509	540,509	540,509	211,449	211,449	211,449	211,449	211,449	2,121.9	1,320.9									
1973	584	—	99,088	51,601	51,601	51,601	51,601	51,601	51,601	25,511	1,098,454	1,098,454	553,256	553,256	553,256	210,793	210,793	210,793	210,793	210,793	2,456.8	1,511.9									
1974	592	—	94,745	46,358	46,358	46,358	46,358	46,358	46,358	27,367	1,106,832	1,106,832	561,864	561,864	561,864	209,518	209,518	209,518	209,518	209,518	2,670.5	1,621.2									
1975	548	—	137,034	79,526	79,526	79,526	79,526	79,526	79,526	25,407	1,160,312	1,160,312	603,028	603,028	603,028	219,644	219,644	219,644	219,644	219,644	3,060.4	1,838.2									
1976	540	—	106,729	57,301	57,301	57,301	57,301	57,301	57,301	23,102	1,182,028	1,182,028	620,974	620,974	620,974	223,838	223,838	223,838	223,838	223,											

Fiscal year	Retirement and survivor monthly benefits awarded										Monthly benefits in current payment status					Benefit payments												
	Railroad employees		Total		Retirees		Spouse		Survivors		Total		Retirees		Spouse		Survivors		Total		Retirement annuities and pensions		Spouse annuities		Total survivor annuities		Total lump-sum survivor payments	
	Thousand	Bf747	Bf748	Bf749	Bf750	Bf751	Bf752	Bf753	Bf754	Bf755	Bf756	Bf757	Million dollars	Bf758	Million dollars	Bf759	Million dollars	Bf760	Million dollars	Bf761	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1980	532	—	83,476	40,511	22,268	20,697	1,203,006	639,314	233,916	329,776	—	4,730.6	2,754.9	634.9	1,327.2	15.6												
1981	503	—	82,854	41,176	21,346	20,321	1,202,364	641,787	233,977	326,427	—	5,286.6	3,070.7	709.1	1,492.8	13.6												
1982	440	—	84,395	39,985	21,613	22,787	1,200,427	642,640	234,009	323,621	—	5,725.6	3,342.1	755.9	1,617.0	13.8												
1983	395	—	81,260	38,687	20,231	22,323	1,193,226	640,985	232,367	319,730	—	6,041.1	3,548.7	805.5	1,676.1	10.6												
1984	395	—	72,237	33,176	18,587	20,461	1,182,606	635,821	230,433	316,218	—	6,099.9	3,602.6	815.2	1,670.8	10.8												
1985	372	—	68,334	31,316	18,286	18,720	1,165,202	626,521	227,284	311,274	—	6,251.0	3,699.8	839.6	1,702.4	11.3												
1986	342	—	69,330	31,875	17,850	19,590	1,151,861	619,548	224,642	307,551	—	6,329.5	3,760.6	847.4	1,711.9	9.3												
1987	320	—	68,224	32,903	18,040	17,271	1,139,782	614,024	222,303	303,342	—	6,520.3	3,897.4	876.2	1,737.0	9.5												
1988	312	—	67,057	32,297	17,776	16,973	1,124,645	607,088	220,093	297,264	—	6,675.9	4,017.6	897.4	1,752.9	9.7												
1989	308	—	66,572	30,403	19,583	16,577	1,111,630	600,065	220,483	290,977	—	6,938.6	4,198.0	942.9	1,789.5	7.9												
1990	296	—	60,743	27,689	17,036	16,006	1,094,112	590,660	218,475	284,878	—	7,194.6	4,376.5	980.4	1,829.6	8.1												
1991	285	—	55,181	24,434	15,641	15,096	1,074,199	579,377	215,733	278,993	—	7,490.8	4,573.5	1,019.7	1,890.9	8.0												
1992	276	—	52,298	23,277	14,442	14,566	1,050,546	566,804	212,036	271,619	—	7,693.9	4,705.1	1,048.8	1,933.1	6.7												
1993	271	—	49,014	20,691	12,719	15,597	1,024,439	552,339	206,967	265,050	—	7,872.3	4,825.7	1,070.4	1,969.1	6.8												
1994	266	—	44,378	19,205	11,847	13,315	998,280	536,856	201,327	258,014	—	7,978.9	4,890.7	1,088.3	1,993.6	7.2												
1995	265	—	42,072	17,771	10,407	13,886	967,175	521,400	195,082	250,611	—	8,059.2	4,963.1	1,079.7	2,009.5	6.3												
1996	257	—	38,635	16,707	9,576	12,343	936,428	505,483	188,281	242,581	—	8,113.6	5,013.3	1,075.9	2,018.5	6.8												
1997	253	—	38,293	16,788	9,175	12,323	906,741	490,448	181,399	234,816	—	8,205.7	5,091.0	1,075.3	2,033.8	5.9												

(Z) Series Bf751 and Bf755, fewer than 500 benefits. Series Bf760-761, less than \$500,000.

Sources

The Railroad Retirement Board *Statistical Supplement to 1980 Annual Report*, Tables B-1, B-2, B-3; *The Railroad Retirement Board: Statistical Tables Through FY 1990*, Tables B-1, B-2, B-3; *The Railroad Retirement Board: Statistical Tables Through FY 1998*, Tables B-1, B-2, B-3, D-1 (available from the Internet site of the Railroad Retirement Board).

Documentation

The Railroad Retirement and Carriers' Taxing Act of 1937 established the railroad retirement system for railroad employees as a program separate from the Social Security system. The 1937 Act provided annuities to retired employees based on their earnings and service. The system was to be administered by the U.S. Railroad Retirement Board. Annuities were paid at age 65 or later regardless of length of service, although persons between the ages of 60 and 64 could receive benefits (at reduced levels) after thirty years of service. Disabled workers could receive a full annuity for disability only if they were totally and permanently disabled and had thirty years of service. Persons between the ages of 60 and 64 could receive a reduced annuity after less than thirty years of service. Under the 1937 Act, survivor benefits were limited to a lump sum of 4 percent of the employee's creditable earnings, less any previously made annuity payments. The system was financed by taxes on employers and employees. Initially, employers and employees each contributed 2.75 percent of an employee's earnings up to \$300 monthly.

Amendments in 1946 lessened the restrictions on disability payments and divided jurisdiction for survivor's benefits between the Railroad Retirement Board and the Social Security Administration. In 1951, further amendments added annuities for the spouses of retired railroad employees and made provisions for Social Security to assume the jurisdiction of benefits for employees with less than ten

years of railroad service. The intention of the latter amendments was to ensure that Railroad Retirement benefits would be no less than the benefits that would be given under Social Security for similar service. In 1965, the Railroad Retirement tax base was coordinated with that of Social Security, and Medicare benefits were extended to railroad retirees and their families.

The Railroad Retirement Act of 1974 restructured the original act into a two-tier system of benefits in order to eliminate duplications in Railroad Retirement and Social Security benefits. The first tier takes into account both Railroad Retirement and nonrailroad Social Security credits and provides benefits equal to Social Security benefits. The second tier focuses on railroad service exclusively and provides benefits comparable to those in other industries with pension systems that provide benefits over and above Social Security. Subsequent amendments in the 1980s and 1990s changed some eligibility requirements as well as employer and employee tax contributions.

For a complete, detailed history of the Railroad Retirement System, see the U.S. Railroad Retirement Board's *Railroad Retirement Handbook*, available at its Internet site.

Series Bf746. Represents the mid-monthly calendar year average of the number of railroad employees.

Series Bf748. Includes annuities to parents from 1981 forward.

Series Bf757. Includes a small amount of payments for Hospital Insurance benefits for services in Canada.

Series Bf755. Includes annuities temporarily being paid at spouse annuity rates, pending final adjudication of survivor annuities.

Series Bf759. Beginning in 1982, includes divorced spouse annuities. Further disaggregated information is available from the Railroad Retirement Board.

Series Bf760. Includes survivor (option) and parents' annuities.

TABLE Bf762-772 Veterans' benefits – number of payments, by eligibility category: 1940-1998

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Disability compensation or pension										
	Service-connected								Non-service-connected		
	Under age 65				Age 65 or older				All ages	Under age 65	Age 65 or older
	Total	All ages	With disability rating		Total	With disability rating					
			Less than 70 percent	70-100 percent		Less than 70 percent	70-100 percent				
Bf762	Bf763	Bf764	Bf765	Bf766	Bf767	Bf768	Bf769	Bf770	Bf771	Bf772	
Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	Thousand	
1940	610	385	—	—	—	—	—	—	189	—	—
1945	1,144	912	—	—	—	—	—	—	159	—	—
1950	2,368	1,990	—	—	—	—	—	—	290	—	—
1955	2,699	2,076	—	—	—	—	—	—	531	—	—
1956	2,739	2,083	2,026	1,841	185	57	43	14	597	319	278
1957	2,797	2,074	2,004	1,825	179	70	53	17	670	304	366
1958	2,850	2,064	1,980	1,807	173	84	65	19	741	279	462
1959	2,934	2,053	1,952	1,781	171	101	78	23	841	257	584
1960	3,009	2,027	1,908	1,746	162	119	93	26	947	219	728
1961	3,107	2,000	1,868	1,711	158	131	104	27	1,077	182	895
1962	3,150	1,987	1,849	1,693	156	138	109	29	1,138	166	972
1963	3,181	1,989	1,844	1,686	158	145	115	30	1,170	165	1,005
1964	3,197	1,993	1,846	1,684	162	147	117	30	1,186	176	1,010
1965	3,217	1,992	1,846	1,679	167	146	117	29	1,210	197	1,013
1966	3,201	1,993	1,850	1,677	173	143	115	28	1,196	221	975
1967	3,182	1,999	1,858	1,683	175	141	114	27	1,173	243	930
1968	3,164	2,011	1,873	1,696	177	138	112	26	1,145	265	880
1969	3,160	2,039	1,904	1,712	192	135	110	25	1,114	286	828
1970	3,181	2,091	1,950	1,754	196	141	116	25	1,086	310	776
1971	3,222	2,146	1,995	1,780	215	151	128	23	1,073	335	738
1972	3,269	2,183	2,022	1,804	218	161	135	26	1,086	381	705
1973	3,257	2,204	2,028	1,806	222	176	150	26	1,053	402	651
1974	3,241	2,211	2,018	1,796	222	193	165	28	1,030	410	620
1975	3,227	2,220	2,006	1,784	222	214	185	29	1,006	430	576
1976	3,236	2,232	1,996	1,767	229	236	209	27	1,003	456	547
1977	3,280	2,248	1,989	1,759	230	258	226	32	1,032	505	527
1978	3,284	2,259	1,971	1,741	230	288	254	34	1,025	516	509
1979	3,241	2,267	1,944	1,717	227	323	285	38	974	500	474
1980	3,196	2,274	1,912	1,689	223	362	320	42	922	467	455
1981	3,154	2,279	1,873	1,656	217	406	359	47	875	438	437
1982	3,096	2,274	1,818	1,606	210	456	404	52	824	406	418
1983	3,044	2,263	1,744	1,544	200	519	461	58	781	373	408
1984	2,980	2,251	1,666	1,476	190	585	520	65	729	339	390
1985	2,931	2,240	1,589	1,408	181	651	579	72	690	306	384
1986	2,883	2,225	1,505	1,335	169	720	641	79	658	274	384
1987	2,844	2,212	1,428	1,268	160	784	698	86	631	244	387
1988	2,804	2,199	1,361	1,209	153	838	746	92	606	219	387
1989	2,776	2,192	1,302	1,156	146	890	792	98	584	196	388
1990	2,746	2,184	1,253	1,113	140	931	828	102	562	175	387
1991	2,709	2,179	1,238	1,098	140	941	838	103	530	156	375
1992	2,674	2,181	1,245	1,104	141	936	833	103	493	138	354
1993	2,660	2,198	1,265	1,122	143	932	828	104	462	128	335
1994	2,659	2,218	1,290	1,144	146	928	824	104	441	122	319
1995	2,669	2,236	1,310	1,158	152	926	819	107	433	120	313
1996	2,671	2,253	1,330	1,171	158	923	814	109	418	116	302
1997	2,667	2,263	1,346	1,178	168	917	805	112	404	112	292
1998	2,668	2,277	1,372	1,191	180	905	790	115	391	110	281

Source

U.S. Social Security Administration, *Social Security Bulletin: Annual Statistical Supplement* (1999), Table 9.F1, p. 341. The original source of the series is published and unpublished data from the U.S. Department of Veteran's Affairs.

Documentation

Two major cash programs are available to veterans. The Disability Compensation program pays monthly benefits to honorably discharged veterans

who are disabled as a result of injury or disease incurred while in or aggravated by active military duty. The amount of payment depends on the degree of disability, rated as the percentage impairment of earning capacity, graduated in intervals from 10 to 100 percent. Veterans with a 30 percent service-connected disability are also entitled to an additional allowance for dependents.

The surviving spouse, dependent children, and certain parents of veterans who die as the result of an injury or disease incurred while in or aggravated

TABLE Bf762-772 Veterans' benefits – number of payments, by eligibility category: 1940-1998 *Continued*

by active military duty are also eligible for compensation under the Dependency and Indemnity Compensation (DIC) program. The amount paid is based on the number of dependents and the degree of disability. DIC benefits may also be paid if the veteran was receiving or was entitled to receive compensation for a service-connected disability at the time of his death. Both Disability Compensation and DIC benefits are not means-tested.

Means-tested monthly benefits are provided to honorably discharged wartime veterans with limited income and resources who are permanently and totally disabled as a result of a condition not related to their military service. The amount of benefit varies with the number of the veteran's dependents and the severity of the veteran's condition. Pensions for non-service-connected death are based on need and are paid to surviving spouses and dependent children of deceased wartime veterans. For a pension to be payable,

the veteran generally must have met the same service requirements established for the non-service-connected disability pension program.

Data reported are as of June 30 (1940-1956), June 30 (1957-1976), and September 30 thereafter.

Series Bf762. Does not always equal the sum of series Bf763 and Bf770 because there are persons receiving payments under special acts and as retired emergency and reserve officers included in the total but excluded from distribution.

Series Bf763. The sum of series Bf764 and Bf767.

Series Bf764. The sum of series Bf765-766.

Series Bf767. The sum of series Bf768-769.

Series Bf770. The sum of series Bf771-772.

PRIVATE WELFARE

Price V. Fishback and Melissa A. Thomasson

TABLE Bf773–785 Private social welfare expenditures: 1950–1994

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Private social welfare expenditures					Social welfare expenditures as a percentage of GDP			Private social welfare expenditures, earlier method				
	Total	Health and medical care	Income maintenance	Education	Welfare services	Public and private	Public	Private	Total	Health and medical care	Income maintenance	Education	Welfare services
	Bf773	Bf774	Bf775	Bf776	Bf777	Bf778	Bf779	Bf780	Bf781	Bf782	Bf783	Bf784	Bf785
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Percent	Percent	Percent	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1950	—	—	—	—	—	—	—	—	12,027	965	8,962	1,615	685
1955	—	—	—	—	—	—	—	—	17,997	1,895	12,909	2,343	850
1960	—	—	—	—	—	—	—	—	27,829	3,535	19,461	3,745	1,088
1965	—	—	—	—	—	—	—	—	42,687	5,975	29,357	5,980	1,375
1966	—	—	—	—	—	—	—	—	42,245	—	31,464	6,648	—
1967	—	—	—	—	—	—	—	—	48,531	—	32,315	7,456	—
1968	—	—	—	—	—	—	—	—	52,679	8,840	33,523	8,566	1,750
1969	—	—	—	—	—	—	—	—	58,611	10,170	37,041	9,500	1,900
1970	—	—	—	—	—	—	—	—	67,353	11,660	43,810	9,883	2,000
1971	—	—	—	—	—	—	—	—	74,380	13,100	48,387	10,793	2,100
1972	95,362	55,800	17,123	14,894	7,545	23.5	16.6	7.7	82,127	14,835	53,214	11,778	2,300
1973	104,083	61,500	18,063	16,223	8,297	23.4	16.7	7.5	90,610	16,640	58,715	12,655	2,600
1974	114,084	67,700	19,660	17,754	8,970	23.8	17.0	7.6	99,592	18,725	64,535	13,432	2,900
1975	128,556	75,700	23,336	19,453	10,067	25.2	18.2	7.9	111,658	21,630	72,333	14,695	3,000
1976	145,570	87,400	25,004	21,418	11,748	26.8	19.7	8.0	125,187	24,605	80,777	16,405	3,400
1977	167,276	100,200	30,662	22,879	13,535	26.6	19.3	8.3	146,769	27,800	97,243	17,876	3,850
1978	189,590	111,000	36,743	25,257	16,590	25.6	18.2	8.3	165,978	31,400	110,778	19,500	4,300
1979	217,279	125,100	44,703	27,936	19,540	25.3	17.7	8.3	—	—	—	—	—
1980	250,534	142,500	53,564	31,694	22,776	26.1	18.1	9.0	—	—	—	—	—
1981	285,585	165,700	58,741	35,416	25,728	26.9	18.7	9.2	—	—	—	—	—
1982	328,111	188,400	72,445	39,199	28,067	28.2	19.2	10.1	—	—	—	—	—
1983	366,635	207,700	84,652	42,891	31,392	28.9	19.6	10.4	—	—	—	—	—
1984	406,535	229,600	95,759	46,427	34,749	27.6	18.3	10.4	—	—	—	—	—
1985	462,283	253,900	118,871	50,513	38,999	27.6	17.8	11.1	—	—	—	—	—
1986	512,287	271,000	143,670	54,406	43,211	28.0	17.7	11.6	—	—	—	—	—
1987	544,584	293,000	143,589	60,394	47,601	28.8	18.5	11.6	—	—	—	—	—
1988	600,132	333,100	148,858	65,595	52,579	29.3	18.7	11.9	—	—	—	—	—
1989	668,806	369,800	167,260	72,434	59,312	29.4	18.5	12.3	—	—	—	—	—
1990	720,718	413,100	164,772	78,263	64,583	29.7	18.5	12.5	—	—	—	—	—
1991	764,439	441,000	170,754	83,687	68,998	31.3	19.8	12.9	—	—	—	—	—
1992	830,628	477,000	187,461	90,145	76,022	32.4	20.6	13.3	—	—	—	—	—
1993	873,871	505,100	192,340	95,532	80,899	33.0	21.1	13.3	—	—	—	—	—
1994	921,465	528,600	204,736	101,832	86,297	—	—	13.3	—	—	—	—	—

Sources

Series Bf773–780. Wilmer Kerns, “Private Social Welfare Expenditures, 1972–94,” *Social Security Bulletin* 60 (1) (1997): 54–5. Series Bf781–785: for the years 1950, 1955, 1960, 1965, 1970, and 1974–1978, Alma W. McMillan and Ann Kallman Bixby, “Social Welfare Expenditures, Fiscal Year 1978,” *Social Security Bulletin* 43 (5) (1980): 16; for the years 1971–1973, Alfred M. Skolnik and Sophie R. Dales, “Social Welfare Expenditures, Fiscal Year, 1976,” *Social Security Bulletin* 40 (1) (1977): 17; for the year 1969, Alfred M. Skolnik and Sophie R. Dales, “Social Welfare Expenditures, 1972–73,” *Social Security Bulletin* 37 (1) (1974): 17; for the year 1968, Alfred M. Skolnik and Sophie R. Dales, “Social Welfare Expenditures, 1971–72,” *Social Security Bulletin* 35 (12) (1972): 16; and for the years 1966 and 1967, Alfred M. Skolnik and Sophie R. Dales, “Social Welfare Expenditures, 1968–69,” *Social Security Bulletin* 32 (12) (1969): 17.

Documentation

The Social Security Administration (SSA) has estimated private social welfare expenditures for 1972 to the present for calendar years – see series Bf773–777 and Bf779 – using methodologies described first in Milton P. Glanz, Wilmer L. Kerns, and Jack Schmulowitz, “Private Social Welfare Expenditures,” 1972–84,” *Social Security Bulletin* 50 (5) (1987): 59–67. Through the late 1970s, the SSA used an alternative methodology to develop earlier estimates for fiscal years during the period 1950–1978 but ended the series because of data-source and methodology limitations.

Series Bf773–777. All estimates are on a calendar-year basis in current-year dollars. The private social welfare expenditures series are estimates of private-sector financing of social welfare programs in the United States. They complement the parallel public social welfare expenditures series but do not have a one-to-one relationship with them. Conceptually, private expenditures can be grouped into four major categories: health and medical care, income maintenance, education, and welfare services.

Series Bf774. The health and medical care expenditures data are from the Health Care Financing Administration. They include spending on health services and supplies (rising from 94.2 percent in 1972 to 97.6 percent in 1994), noncommercial medical research (0.2 to 0.4 percent), and medical facilities construction (5.2 percent in 1972, declining to 2.2 percent in 1974).

Series Bf775. Income maintenance expenditures represent outlay for employee benefit plans in the private sector, including group life insurance,

TABLE Bf773–785 Private social welfare expenditures: 1950–1994 *Continued*

sickness and disability insurance, long-term disability insurance, and private pension plans.

Series Bf776. The SSA developed a methodology for estimating private expenditures for education that has produced estimates similar to those by the Bureau of Economic Analysis, using an alternative methodology. Both agencies have modified their procedures over the past ten to fifteen years, and the series are approaching convergence. For discussion of the procedures for the period 1972–1994, see Wilmer Kerns, “Private Social Welfare Expenditures, 1972–90,” *Social Security Bulletin* 55 (3) (1992): 62–63.

Series Bf777. The welfare services estimates are based on an indicator series developed by the U.S. Bureau of Economic Analysis for the national income

and product accounts on personal consumption expenditures. The data are collected by the Census Bureau from its Census of Service Industries. Public funds are excluded from the estimates for private social services. The services include individual and family services (19.6 percent in 1992), residential care (18.2 percent), civic and social/fraternal organizations (18.1), child day care (10.9), job training and vocational rehabilitation services (9.4), and social services not elsewhere classified (23.9).

Series Bf778. Fiscal year basis.

Series Bf780. Adjusts for overlap that occurs when payments received under public or private income-maintenance programs are used to purchase medical care, educational services, or residential care.

TABLE Bf786-801 Private social welfare expenditures – disaggregations of major categories: 1960-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Private social welfare expenditures on income maintenance										Private social welfare expenditures on education								
	Private health expenditures					Group life insurance for all wage and salary workers					Private social welfare expenditures on education								
	Total	Bf787	Bf788	Bf789	Total	Bf790	Bf791	Bf792	Bf793	Bf794	Bf795	Supplemental unemployment benefits	Total	Elementary, secondary, and nursery schools	Higher education	Commercial and vocational schools	Private construction of schools	Sickness and disability insurance payments	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1960	20,203	19,496	139	568	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1961	21,466	20,606	147	713	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1962	23,291	22,232	153	905	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1963	25,343	24,237	162	945	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1964	28,290	26,944	170	1,176	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1965	30,867	29,417	176	1,273	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1966	31,600	30,120	186	1,294	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1967	31,964	30,561	198	1,205	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1968	35,879	34,262	208	1,410	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1969	40,247	38,047	213	1,987	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1970	45,537	42,957	215	2,364	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1971	49,829	46,915	233	2,682	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1972	55,808	52,522	227	3,060	17,123	3,180	9,710	3,999	—	234	14,894	14,894	14,894	3,941	8,224	1,761	968	2,649	—
1973	61,550	58,211	232	3,107	18,063	3,195	12,638	—	—	400	17,754	17,754	17,754	4,461	8,940	1,985	837	—	—
1974	67,667	64,288	252	3,128	19,660	3,380	14,398	—	—	500	19,453	19,453	19,453	5,218	9,810	2,071	655	3,277	—
1975	75,695	72,274	264	3,158	23,336	3,523	17,091	5,058	—	200	21,418	21,418	21,418	6,302	10,293	2,682	567	3,396	—
1976	87,434	83,801	267	3,360	25,004	3,832	22,064	—	—	190	22,879	22,879	22,879	6,481	11,153	3,303	660	3,906	—
1977	100,158	96,621	220	3,317	30,662	4,193	27,316	—	—	248	25,257	25,257	25,257	7,323	12,120	3,618	660	4,277	—
1978	111,048	107,432	236	3,380	36,743	4,564	31,602	—	—	400	27,936	27,936	27,936	8,130	13,136	4,069	729	4,692	—
1979	125,054	121,193	254	3,607	44,703	5,075	37,605	—	1,282	972	31,694	31,694	31,694	9,338	14,656	4,344	806	5,772	—
1980	142,493	138,041	292	4,161	53,564	5,746	44,569	8,630	—	491	35,416	35,416	35,416	10,251	16,520	4,661	1,175	6,280	—
1981	165,715	160,297	312	5,107	58,741	6,269	54,380	9,178	—	930	39,199	39,199	39,199	10,727	19,000	4,994	1,171	6,437	—
1982	188,397	181,844	390	6,163	72,445	6,510	66,743	9,171	1,688	411	42,891	42,891	42,891	11,569	21,993	5,123	1,356	6,884	—
1983	207,746	200,372	456	6,919	84,652	6,899	76,683	—	1,874	282	46,427	46,427	46,427	12,362	24,249	5,661	1,412	6,993	—
1984	229,938	222,755	506	6,677	95,759	7,489	98,570	—	1,937	305	50,513	50,513	50,513	13,121	26,490	6,175	1,400	7,498	—
1985	254,518	248,018	538	5,962	118,871	7,797	122,384	10,570	2,253	488	54,406	54,406	54,406	13,550	28,758	6,934	1,700	8,026	—
1986	271,398	264,844	782	5,771	143,670	8,166	120,672	10,748	2,293	636	60,394	60,394	60,394	14,496	31,243	7,513	2,100	8,046	—
1987	293,291	285,982	800	6,509	143,589	8,418	124,871	11,822	2,293	485	65,595	65,595	65,595	15,435	33,788	8,410	3,700	8,896	—
1988	334,251	325,592	839	7,820	148,858	9,063	141,286	12,789	2,295	403	72,434	72,434	72,434	16,861	36,608	10,652	2,900	9,636	—
1989	371,413	362,361	882	8,170	167,260	9,278	138,114	13,616	2,892	774	78,263	78,263	78,263	17,546	40,288	11,985	3,300	9,869	—
1990	416,187	405,939	960	9,288	164,772	9,472	143,314	13,680	2,926	952	83,687	83,687	83,687	17,960	43,952	12,665	4,100	10,362	—
1991	448,859	438,737	1,090	9,033	170,754	10,184	158,857	13,844	3,172	593	90,145	90,145	90,145	19,312	47,978	12,849	4,900	10,615	—
1992	483,553	472,546	1,183	9,824	187,461	10,693	163,158	14,684	3,143	457	95,532	95,532	95,532	20,201	52,024	13,709	5,100	10,615	—
1993	513,172	501,275	1,215	10,682	192,340	11,229	174,452	15,132	2,900	259	101,832	101,832	101,832	21,222	55,908	14,523	4,900	—	—
1994	524,908	513,136	1,276	10,496	204,736	—	—	15,901	2,895	—	—	—	—	—	59,675	15,535	5,400	—	—
1995	538,507	527,555	1,325	9,628	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1996	561,141	549,454	1,432	10,254	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1997	585,312	571,946	1,488	11,877	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

(continued)

TABLE Bf786–801 Private social welfare expenditures – disaggregations of major categories: 1960–1997 *Continued***Sources**

For series Bf786–789, see the Health Care Financing Administration Internet site, National Health Care Expenditures. See also *Health Care Financing Review, Statistical Supplement, 1998*. For series Bf790–800, Wilmer Kerns, “Private Social Welfare Expenditures, 1972–94,” *Social Security Bulletin* 60 (1) (1997): 54–9 and “Role of the Private Sector in Financing Social Welfare Programs, 1972–92,” *Social Security Bulletin* 58 (1) (1995): 66–73. There are some exceptions for the income-maintenance expenditures: the figures for 1974 and 1976–1978 are from Wilmer Kerns and Milton P. Glanz, “Private Social Welfare Expenditures, 1972–95,” *Social Security Bulletin* 51 (8) (1988): 8; and the figures for 1979 and 1984 are from Wilmer Kerns, “Private Social Welfare Expenditures, 1972–92,” *Social Security Bulletin* 57 (3) (1992): 63. For series Bf801, see Wilmer Kerns, “Social Welfare Expenditure, 1972–1991,” *Social Security Bulletin* 57 (1) (1994): 92, and Kerns and Glanz (1988).

Documentation

For more detail on health care expenditures and the source, see the text for Table Bf875–886.

Series Bf786. Identical to series Bf876, and the sum of series Bf787–789.

Series Bf787. Health services and supplies include “personal health care,” comprising therapeutic goods or services rendered to treat or prevent a specific disease or condition in a specific person, and services, including hospital services, physician services, dental service, durable and nondurable medical devices, nursing home care, program administration, and net costs of health insurance. The series represents spending for care rendered during the year. It is the sum of personal health care expenditures, government public health activity, and program administration. It is distinguished from research and construction expenditures, which represent an investment in the future health care system.

Series Bf788–789. Includes noncommercial biomedical research and the construction of health care facilities.

Series Bf790. Identical to series Bf775.

Series Bf790–795. In the years 1980 through 1994, the subcategories should sum to series Bf790. Prior to that time, series Bf790 includes information on accidental death and dismemberment. Missing information on sickness and disability in some years (see discussion that follows) also prevent the subcategories from summing to the total. See the text for Table Bf773–785 for more detail.

Series Bf791. Includes programs for government civilian employees in order to maintain consistency with data reported for years prior to 1988. The estimates are further adjusted to exclude group policies not based directly on employer–employee relationships, such as insurance for credit card holders, mortgage insurance, fraternal societies, savings or investment groups, professional societies and health employee associations; the excluded categories account for about 8 percent of total life insurance benefits. The totals also include accidental death and dismemberment benefits for the 1972–1979

period. After 1979, the Health Insurance Association of America eliminated this item from their questionnaire.

Series Bf792. Based on mandatory form 5500 reports filed with the Internal Revenue Service and forwarded to the Department of Labor. Defined-contribution benefit plans included 401(k)-type plans, into which employees can contribute a portion of their salaries with or without employer contributions on a tax-deferred basis. Another form of pension coverage is the employee stock ownership plan. Benefits paid include benefits from all employment-related pension plans to which employees contribute (such as thrift plans). However, withdrawals from individual savings plans, individual retirement accounts, and Keogh plans are not included. More detail on specific types of pension plan expenditures is available in the source.

Series Bf793. Sickness and disability benefits are sick leave and payments for short-term sickness and disability from private and self-insurance. After 1980 long-term and short-term disability benefits are estimated separately. This series does not correspond exactly to the series on short-term sickness benefits in Tables Bf854–874. For the years 1972–1986, Kerns and Glanz (1988, p. 8) report figures on sickness and disability benefits, but the estimates for the overlapping years do not match up with the data on sickness and disability reported in this table.

Series Bf793 and Bf801. In the 1995 Kerns article, there was a change in the method of calculating sickness and disability insurance payments that led to substantial changes in the numbers reported. Series Bf801 was included for persons who were interested in having a consistent series for changes during the 1970s and early 1980s. Kerns seems to consider series Bf793 to be the superior estimate.

Series Bf794. Long-term disability benefits, as a rule, commence on the first day of the seventh month of disability. The figures are estimated from data supplied by the Health Insurance Association of America. Long-term disability benefits paid under the provisions of employment-related pension plans are included in the private pension category.

Series Bf795. Data on supplemental unemployment benefits are taken from the national income and product accounts (NIPA) series on other labor income by industry and by type. Most of these benefits are paid to automobile workers under management-union contractual agreements.

Series Bf796. Identical to series Bf776, and the sum of series Bf797–800.

Series Bf796–800. The education spending figures are derived from methods developed by both the Social Security Administration (SSA) and the U.S. Bureau of Economic Analysis (BEA). For consistency, the SSA is now using the BEA’s NIPA estimates with two minor adjustments. The SSA estimates include school construction costs funded by private sources, which the BEA reports elsewhere. The BEA estimate for education includes contributions from foundations and from nonprofit research funds, which are excluded by the SSA.

Series Bf801. Covers private industry wage and salary workers.

TABLE Bf802–813 Employee-benefit plans – estimated number of workers covered, by type of benefit: 1950–1975

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	All wage and salary workers							Wage and salary workers in private industry				
	With life insurance and death benefits	With accidental death and dismemberment coverage	With hospitalization coverage				With major medical expenses coverage	Total	With coverage for temporary disability including formal sick leave			
			Total	Written in compliance with California temporary disability law	With surgical coverage	With regular medical coverage			In compliance with state temporary disability laws	With coverage for long-term disability	With supplemental unemployment coverage	With retirement coverage
Million	Million	Million	Million	Million	Million	Million	Million	Million	Million	Million	Million	Million
1950	19.4	8.1	24.3	1.2	17.7	8.2	—	20.1	6.6	—	—	9.8
1951	20.8	9.5	27.1	1.4	21.7	10.7	—	21.7	6.8	—	—	10.8
1952	22.3	10.7	28.8	1.5	24.2	12.7	0.2	22.4	7.0	—	—	11.3
1953	24.2	11.8	31.0	1.5	26.9	15.8	0.5	23.4	7.0	—	—	12.6
1954	25.7	14.0	31.1	1.4	27.8	17.5	0.8	22.9	6.7	—	—	13.4
1955	28.1	15.6	32.8	1.4	30.2	20.2	2.2	23.5	6.8	—	1.0	14.2
1956	29.8	17.3	35.1	1.5	32.4	22.0	3.5	24.7	7.1	—	2.0	15.5
1957	31.2	18.4	36.4	1.6	34.2	23.9	4.9	24.9	7.2	—	1.9	16.7
1958	31.7	18.7	36.2	1.4	34.1	24.5	5.9	23.8	6.8	—	1.7	17.2
1959	33.5	19.7	37.2	1.5	35.4	26.1	7.2	24.4	6.9	—	1.9	18.2
1960	34.2	20.9	39.3	1.2	37.4	28.2	8.8	24.5	6.8	—	1.7	18.7
1961	35.5	21.3	39.9	1.1	38.0	29.8	10.3	24.6	6.8	—	1.9	19.2
1962	36.4	22.6	41.0	0.9	39.0	31.3	11.7	25.3	6.8	—	1.8	19.7
1963	37.8	24.7	42.6	0.3	40.8	33.3	13.2	23.6	6.2	0.7	1.8	20.3
1964	40.1	26.5	43.9	0.3	41.8	35.4	14.7	23.9	6.2	1.2	2.0	20.9
1965	41.9	28.4	45.7	0.3	43.4	38.2	16.6	24.5	6.4	1.9	2.1	21.8
1966	43.5	28.5	47.2	0.4	45.2	40.2	18.3	25.5	6.6	2.3	2.2	22.7
1967	45.7	30.4	48.7	0.4	47.0	42.5	20.2	26.0	6.7	3.7	2.2	24.3
1968	48.2	33.7	50.1	0.4	48.3	43.6	21.7	27.9	6.7	4.6	2.2	24.8
1969	49.0	36.5	52.1	0.4	50.6	46.1	23.4	29.4	6.9	5.5	2.2	26.0
1970	52.0	38.7	53.1	0.4	51.5	48.0	24.6	29.7	7.1	7.0	2.2	26.1
1971	53.5	39.2	53.2	0.4	51.7	48.3	25.7	30.1	6.9	7.9	2.2	26.4
1972	55.6	40.7	54.2	0.4	52.9	49.4	26.4	31.3	7.1	9.5	2.0	27.5
1973	57.8	42.7	56.8	0.4	55.4	53.7	27.6	32.0	7.2	10.6	2.1	29.2
1974	60.6	44.3	57.6	0.4	56.1	54.9	28.2	31.7	7.0	11.1	2.0	29.8
1975	62.4	46.5	58.2	0.4	56.6	56.1	29.6	31.1	7.0	11.5	1.9	30.3

Sources

Martha Remy Yohalem, "Employee-Benefit Plans, 1975," *Social Security Bulletin* 38 (11) (1977): 20, and Alfred M. Skolnik, "Twenty-five Years of Employee-Benefit Plans," *Social Security Bulletin* 39 (9) (1976): 5.

Documentation

An "employee-benefit plan," as defined here, is any type of plan sponsored or initiated unilaterally or jointly by employers or employees and providing benefits that stem from the employment relationship and are not underwritten or paid directly by government (federal, state, or local). In general, the intent is to include plans that provide in an orderly predetermined fashion (1) income maintenance when regular earnings are cut off because of death, accident, sickness, retirement, or unemployment, and (2) benefits to meet medical expenses associated with illness or injury. The plans exclude workers' compensation required by statute and employer's liability.

Government employees who are covered by plans underwritten by non-governmental organizations are included in the series, whether or not the government unit contributes (as an employer) to the financing of the program. Specifically included here are plans providing government employees with group life insurance, accidental death and dismemberment insurance, and hospital, surgical, regular medical, and major-medical expense insurance. Retirement and sick-leave plans for government employees, which are financed and administered directly by government, are excluded from the series.

Coverage data are generally based on the number of active participants (those currently employed) and may include persons who have been temporarily laid off or retired. The practice of continuing coverage for a retired worker is particularly prevalent in group life insurance. Many group life and

health plans permit a person on layoff to continue coverage in the group for three to six months, and, in some cases, even longer. In addition, workers who have terminated employment may carry vested pension rights; these persons are often included in the total coverage group. No attempt has been made to correct the coverage data for such limitations; therefore, the proportion that covered employees represent of all employed workers and the proportion that contributions represent of aggregate payrolls are somewhat overstated. Nevertheless, long-run growth patterns for the various types of plans remain valid.

Series Bf802. Group and wholesale life insurance coverage is based on data from the Institute of Life Insurance, *Group Life Insurance and Group Annuity Coverage in the United States*, annual issues, modified to exclude group plans not related to employment. It also excludes coverage under servicemen's group life insurance plans. Self-insured death-benefit plan coverage is based on data for various trade-union, mutual benefits association, and company-administered plans.

Series Bf803. Accidental death and dismemberment coverage is from Health Insurance Association of America, *Group Health Insurance Coverage in the United States*, annual issues.

Series Bf804 and Bf806–807. Data on hospitalization, surgical, and regular medical coverage are from Marjorie Smith Mueller and Paula A. Piro, "Private Health Insurance in 1974: A Review of Coverage, Enrollment, and Financial Experience," *Social Security Bulletin* 39 (3) (1976): 3–20.; Health Insurance Association of America, *Group Health Insurance Coverage in the United States*,

TABLE Bf802–813 Employee-benefit plans – estimated number of workers covered, by type of benefit: 1950–1975
Continued

annual issues; and Health Insurance Institute, *Source Book of Health Insurance Data* (1975–1976). Data are modified to exclude participants not actively employed and to allow for duplication resulting from participation in more than one plan, using benchmark data from a special household survey of employed workers conducted in conjunction with the April 1972 Current Population Survey. The data are adjusted to include employees covered by group comprehensive major-medical expenses insurance.

Series Bf804–805. Hospitalization coverage includes private hospital plans written in compliance with state temporary disability insurance law in California, shown separately in series Bf805.

Series Bf808. Major medical expenses coverage represents coverage under group supplementary and comprehensive major-medical insurance underwritten by commercial insurance carriers.

Series Bf809–810. Temporary disability and formal sick leave programs include private plans written in compliance with state temporary disability insurance laws in California, Hawai'i, New Jersey, and New York, shown separately in series Bf810. The data are from *A Survey of Accident and Health Coverage in the United States* (Health Insurance Council, 1950) and the Health Insurance Association of America and Health Insurance Institute and are adjusted to exclude credit, accident, and health insurance. Data for 1950 are modified slightly to adjust for the effect of state temporary disability insurance laws on formal paid sick leave and self-insured plan coverage. Before 1963, this series includes group long-term disability, which was minimal before that time.

Series Bf811. The long-term disability coverage series reported separately in 1963 comes from Health Insurance Institute, *Source Book of Health Insurance Data* (1975–1976).

Series Bf812. Information on supplemental unemployment insurance is based on trade-union and industry reports and “Financing Supplemental Unemployment Benefit Plans,” *Monthly Labor Review*, November 1969, and a 1976 survey of reports filed with the U.S. Department of Labor under the Welfare and Pension Plans Disclosure Act. The data exclude dismissal wage and separation allowances, except when financed from supplemental unemployment benefit funds covering temporary and permanent layoffs.

Series Bf813. Retirement coverage is estimated by the Social Security Administration from data furnished primarily by the Institute of Life Insurance and the Securities and Exchange Commission. The data are adjusted for duplication resulting from participation in more than one plan and the vesting of benefits, using benchmark data from a special household survey of employed workers conducted in conjunction with the April 1972 Current Population Survey. The series includes pay-as-you-go and deferred profit-sharing plans, plans of nonprofit organizations, union pension plans, and railroad plans supplementing the federal Railroad Retirement program. It excludes beneficiaries as well as pension plans for federal, state, and local government employees, tax-sheltered annuity plans, and plans for the self-employed.

TABLE Bf814-824 Employee-benefit plans – estimated employer and employee contributions, by type of benefit: 1950-1975

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	All wage and salary workers							Wage and salary workers in private industry			
	Total	Life insurance and death benefits	Accidental death and dismemberment benefits	Health benefits				Temporary and long-term disability		Supplemental unemployment benefits	Retirement benefits
				Total	Hospitalization benefits	Surgical and regular medical benefits	Major medical benefits	Total	In compliance with state temporary disability laws		
	Bf814	Bf815	Bf816	Bf817	Bf818	Bf819	Bf820	Bf821	Bf822	Bf823	Bf824
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1950	3,940	480	18	856	562	294	—	505	76	—	2,080
1951	4,986	524	23	1,139	727	412	—	640	144	—	2,660
1952	5,677	620	27	1,373	881	493	—	687	156	—	2,970
1953	6,630	694	31	1,664	1,071	593	—	766	187	—	3,475
1954	6,989	732	34	1,924	1,221	684	18	785	178	—	3,515
1955	7,857	881	43	2,194	1,385	770	39	859	179	40	3,840
1956	8,911	1,002	50	2,595	1,603	898	94	914	177	125	4,225
1957	10,042	1,077	57	2,996	1,806	1,021	169	1,023	217	170	4,720
1958	10,521	1,179	61	3,286	1,945	1,076	266	1,049	232	125	4,820
1959	11,715	1,292	66	3,774	2,230	1,187	357	1,098	233	125	5,360
1960	12,530	1,416	70	4,257	2,505	1,282	470	1,179	239	118	5,490
1961	13,482	1,557	75	4,924	2,834	1,440	651	1,215	255	102	5,610
1962	14,758	1,677	80	5,508	3,159	1,596	753	1,311	255	152	6,030
1963	15,881	1,867	92	5,993	3,472	1,684	837	1,360	244	148	6,420
1964	17,657	2,044	99	6,726	3,885	1,876	965	1,397	238	112	7,280
1965	19,919	2,233	116	7,520	4,333	2,109	1,078	1,574	258	116	8,360
1966	21,683	2,376	131	8,042	4,547	2,300	1,195	1,754	280	130	9,250
1967	23,419	2,538	142	8,549	4,703	2,552	1,294	1,897	311	113	10,180
1968	26,889	2,937	169	10,076	5,539	2,915	1,621	2,333	342	125	11,250
1969	30,569	3,222	190	11,595	6,341	3,363	1,890	2,702	399	110	12,750
1970	39,861	3,577	224	13,878	7,569	3,998	2,310	3,075	417	109	14,000
1971	39,861	3,869	229	15,703	8,578	4,489	2,635	3,227	443	194	16,640
1972	45,429	4,343	284	18,248	9,528	5,152	3,568	3,750	499	264	18,540
1973	50,460	4,394	303	20,500	10,512	5,938	4,050	3,939	522	224	21,100
1974	57,741	4,711	329	23,068	11,437	7,022	4,609	4,383	517	230	25,020
1975	67,302	5,089	331	27,087	13,273	8,162	5,652	4,704	580	240	29,850

Source

Martha RemyYohalem, "Employee-Benefit Plans, 1975," *Social Security Bulletin* 38 (11) (1977): 23, and Alfred M. Skolnik, "Twenty-five Years of Employee-Benefit Plans," *Social Security Bulletin* 39 (9) (1976): 8.

Documentation

See the text for Table Bf802-813 for more information. See the parallel table Bf825-835 for data on benefits paid.

Employee-benefit plans have become the predominant way through which most workers and their families obtain basic medical care protection, and they provide many services and protections not originally included. The increasing dollar amounts of benefits paid under employee-benefit plans, however, do not necessarily represent real gains – in terms of increased quality of care and adequacy of protection provided – for individual employees. Some of the rise in aggregate expenditures is the result of growth in the number of employees and dependents covered, increased per unit cost of providing specific services and benefits, and increased utilization of services.

Measuring the magnitude of real gain in health care benefits is particularly difficult. See Herbert E. Klarman, Dorothy P. Rice, Barbara S. Cooper, and H. Louis Stettler III, *Sources of Increase in Selected Medical Care Expenditures, 1929-1969*, Staff Paper number 4 (Social Security Administration, Office of Research and Statistics, 1970). The utilization of medical and hospital services is influenced by a number of factors such as the age distribution of the workforce, variations in incidence of sickness, shifts in types of services used, and the tendency for private plans to provide supplemental rather than basic protection to the elderly, as the result of Medicare.

Series Bf815 and Bf826. Group and wholesale life insurance contributions and benefits are based, respectively, on data from Institute of Life Insurance,

Group Life Insurance and Group Annuity Coverage in the United States (annual issues) and Institute of Life Insurance, *Life Insurance Fact Book 1976*. The data have been modified to exclude group and service plans not related to employment. Also excludes premiums for, and benefits paid under, servicemen's group life insurance. Self-insured and unfunded death benefits are based on 1976 survey of various trade-union, mutual benefit association, and company-administered and jointly administered plans filed with the U.S. Department of Labor under the Welfare and Pension Plan Disclosures Act.

Series Bf816 and Bf827. Accidental death and dismemberment contributions and benefits are from Health Insurance Association of America, *Group Health Insurance Coverages in the United States* (annual issues) and unpublished data from the Institute of Life Insurance.

Series Bf818 and Bf829. Hospitalization contributions and benefits include private hospital plans written in compliance with state temporary disability insurance law in California.

Series Bf818-819 and Bf829-830. Information on the hospitalization and surgical and regular medical contributions and benefits are from Marjorie Smith Mueller, "Private Health Insurance in 1975: Coverage, Enrollment, and Financial Experience," *Social Security Bulletin* 40 (6) (1977): 3-21; Health Insurance Association of America, *Group Health Insurance Coverages in the United States* (annual issues); and Marjorie Smith Mueller and Paula A. Piro, "Private Health Insurance in 1974," *Social Security Bulletin* 39 (3) (1976): 3-20. In estimating contributions for, and benefits paid to, employees under plans other than group insurance and union and company plans, it was assumed that the proportion of subscription income, and benefits attributable to, employed groups increased gradually from 75 percent in 1950-60 to 85 percent in 1974.

TABLE Bf814-824 Employee-benefit plans – estimated employer and employee contributions, by type of benefit: 1950-1975 Continued

Series Bf820 and Bf831. Major medical contributions and benefits represent either premiums or benefits for group supplementary and comprehensive major-medical insurance underwritten by commercial insurance carriers. Data are from Health Insurance Association of America *Group Health Insurance Coverages in the United States* (annual issues).

Series Bf821-822 and Bf832-833. Temporary disability contributions and benefits are from Daniel N. Price, "Cash Benefits for Short-Term Sickness," *Social Security Bulletin* 39 (7) (1976): 22-34 and from unpublished Social Security Administration information. The data include private plans written in compliance with state temporary disability insurance laws in California, New Jersey, and New York (Hawai'i information not available), shown separately in series Bf822 and Bf833. This information includes contributions under long-term disability plans, not available separately.

Series Bf823 and Bf834. Supplemental unemployment contributions and benefits are based on trade union and industry reports, Emerson H. Beier,

"Financing Supplemental Unemployment Benefit Plans," *Monthly Labor Review* 92 (11) (1969): 31-35, and a 1976 survey of reports filed with the Department of Labor under the Welfare and Pension Plans Disclosure Act. The data exclude dismissal wage and separation allowances, except when financed from supplemental unemployment benefit funds covering temporary and permanent layoffs.

Series Bf824 and Bf835. Retirement data are estimated by the Social Security Administration from the data compiled in the American Council of Life Insurance, *Pension Facts 1976* and the Securities and Exchange Commission, *1975 Survey of Private Noninsured Pension Funds*. The data include benefits and contributions paid under pay-as-you-go and deferred profit-sharing plans, plans of nonprofit organizations, union pension plans, and railroad plans supplementing the federal Railroad Retirement program. Excluded are benefits and contributions paid under plans for federal, state, and local employees, under tax-sheltered annuity plans, and under plans for the self-employed.

TABLE Bf825-835 Employee-benefit plans – estimated benefits paid, by type of benefit: 1950-1975

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	All wage and salary workers							Wage and salary workers in private industry			
	Health benefits							Temporary disability benefits paid, including formal sick leave			
	Total	Life insurance and death benefits	Accidental death and dismemberment benefits	Total	Hospitalization benefits	Surgical and regular medical benefits	Major medical benefits	Total	In compliance with state temporary disability laws	Supplemental unemployment benefits	Retirement benefits
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1950	1,816	310	16	709	478	231	—	411	54	—	370
1951	2,385	363	17	1,012	660	352	—	545	113	—	450
1952	2,747	405	20	1,202	791	411	—	600	128	—	520
1953	3,183	463	22	1,446	954	492	—	632	140	—	620
1954	3,531	509	25	1,643	1,080	553	10	644	132	—	710
1955	4,076	582	26	1,903	1,242	637	24	715	135	—	850
1956	4,829	650	31	2,320	1,495	758	67	824	151	5	1,000
1957	5,595	779	37	2,722	1,714	877	131	897	178	20	1,140
1958	6,275	851	42	3,055	1,893	929	233	902	184	135	1,290
1959	7,000	919	43	3,464	2,108	1,024	332	960	190	75	1,540
1960	7,813	1,018	47	3,898	2,355	1,116	427	1,038	196	91	1,720
1961	8,808	1,122	58	4,482	2,676	1,244	562	1,046	201	130	1,970
1962	9,963	1,237	69	5,083	3,005	1,411	667	1,143	204	102	2,330
1963	10,849	1,342	83	5,536	3,312	1,472	752	1,201	198	97	2,590
1964	12,032	1,430	88	6,242	3,731	1,642	869	1,221	191	62	2,990
1965	13,567	1,550	90	7,012	4,161	1,848	1,004	1,333	198	62	3,520
1966	14,966	1,707	97	7,428	4,312	1,980	1,136	1,462	208	82	4,190
1967	16,295	1,899	101	7,837	4,389	2,142	1,306	1,549	222	119	4,790
1968	19,234	2,137	121	9,415	5,289	2,468	1,658	1,927	252	105	5,530
1969	22,224	2,385	129	10,984	6,128	2,934	1,922	2,177	281	100	6,450
1970	26,115	2,493	151	13,323	7,344	3,564	2,415	2,542	307	246	7,360
1971	29,341	2,704	171	14,962	8,253	3,960	2,749	2,619	310	296	8,590
1972	32,872	2,939	182	16,539	8,872	4,480	3,187	2,978	329	234	10,000
1973	36,210	3,197	212	18,267	9,646	5,185	3,435	3,205	354	110	11,220
1974	42,012	3,385	256	21,381	11,059	6,293	4,029	3,660	382	400	12,930
1975	47,887	3,563	286	24,929	13,064	7,404	4,461	3,799	401	500	14,810

Sources

Martha RemyYohalem, "Employee-Benefit Plans, 1975," *Social Security Bulletin* 38 (11) (1977): 24, and Alfred M. Skolnik, "Twenty-five Years of Employee-Benefit Plans," *Social Security Bulletin* 39 (9) (1976): 10.

Documentation

See the text for Table Bf814-824 for a discussion of these series and the text for Table Bf802-813 for additional information.

TABLE Bf836-853 Private pension and deferred profit-sharing plans – estimated coverage, contributions, reserves, beneficiaries, and payments: 1930-1970

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Coverage			Employer contributions			Employee contributions		
	Total	Insured plans	Noninsured plans	Total	Insured plans	Noninsured plans	Total	Insured plans	Noninsured plans
	Bf836	Bf837	Bf838	Bf839	Bf840	Bf841	Bf842	Bf843	Bf844
	Thousand	Thousand	Thousand	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1930	2,700	—	—	130	—	—	70	—	—
1935	2,700	—	—	140	—	—	90	—	—
1940	4,100	—	—	180	—	—	130	—	—
1945	6,400	—	—	830	—	—	160	—	—
1950	9,800	2,600	7,200	1,750	720	1,030	330	200	130
1951	11,000	2,900	8,100	2,280	820	1,460	380	210	170
1952	11,700	3,200	8,500	2,540	910	1,630	430	240	190
1953	13,200	3,400	9,800	2,990	1,010	1,980	485	260	225
1954	14,200	3,600	10,600	3,000	1,030	1,970	515	270	245
1955	15,400	3,800	11,600	3,280	1,100	2,180	560	280	280
1956	16,900	4,100	12,800	3,600	1,110	2,490	625	290	335
1957	18,100	4,400	13,700	4,030	1,220	2,810	690	300	390
1958	18,800	4,500	14,300	4,100	1,250	2,850	720	310	410
1959	19,900	4,800	15,100	4,590	1,330	3,260	770	330	440
1960	21,200	4,900	16,300	4,710	1,190	3,520	780	300	480
1961	22,200	5,100	17,100	4,830	1,180	3,650	780	290	490
1962	23,100	5,200	17,900	5,200	1,240	3,960	830	310	520
1963	23,800	5,400	18,400	5,560	1,390	4,170	860	300	560
1964	24,600	6,000	18,600	6,370	1,520	4,850	910	310	600
1965	25,300	6,200	19,100	7,370	1,770	5,600	990	320	670
1966	26,300	6,900	19,400	8,210	1,850	6,360	1,040	330	710
1967	27,500	7,700	19,800	9,050	2,010	7,040	1,130	340	790
1968	28,000	7,900	20,100	9,940	2,240	7,700	1,230	340	890
1969	29,000	8,700	20,300	11,520	3,030	8,490	1,360	350	1,010
1970	29,700	9,300	20,400	12,580	2,860	9,720	1,420	350	1,070

(continued)

Year	Reserves			Monthly beneficiaries			Benefit payments		
	Total	Insured plans	Noninsured plans	Total	Insured plans	Noninsured plans	Total	Insured plans	Noninsured plans
	Bf845	Bf846	Bf847	Bf848	Bf849	Bf850	Bf851	Bf852	Bf853
	Billion dollars	Billion dollars	Billion dollars	Thousand	Thousand	Thousand	Million dollars	Million dollars	Million dollars
1930	0.8	—	—	100	—	—	90	—	—
1935	1.3	—	—	110	—	—	100	—	—
1940	2.4	—	—	160	—	—	140	—	—
1945	5.4	—	—	310	—	—	220	—	—
1950	12.1	5.6	6.5	450	150	300	370	80	290
1951	14.5	6.6	8.0	540	170	370	450	100	350
1952	17.3	7.7	9.7	650	200	450	520	120	400
1953	20.5	8.8	11.7	750	230	520	620	140	480
1954	23.8	10.0	13.8	880	270	610	710	160	550
1955	27.5	11.3	16.1	980	290	690	850	180	670
1956	31.4	12.5	18.9	1,090	320	770	1,000	210	790
1957	36.1	14.1	22.1	1,240	370	870	1,140	240	900
1958	40.9	15.6	25.2	1,400	430	970	1,290	290	1,000
1959	46.6	17.6	29.1	1,590	500	1,090	1,540	340	1,200
1960	52.0	18.8	33.1	1,780	540	1,240	1,720	390	1,330
1961	57.8	20.2	37.5	1,910	570	1,340	1,970	450	1,520
1962	63.5	21.6	41.9	2,100	630	1,470	2,330	510	1,820
1963	69.9	23.3	46.6	2,280	690	1,590	2,590	570	2,020
1964	77.7	25.2	52.4	2,490	740	1,750	2,990	640	2,350
1965	86.5	27.3	59.2	2,750	790	1,960	3,520	720	2,800
1966	95.5	29.3	66.2	3,110	870	2,240	4,190	810	3,380
1967	106.2	31.9	74.2	3,410	930	2,480	4,790	910	3,880
1968	117.8	34.8	83.1	3,770	1,010	2,760	5,530	1,030	4,500
1969	127.8	37.2	90.6	4,180	1,070	3,110	6,450	1,160	5,290
1970	137.1	40.1	97.0	4,720	1,220	3,500	7,360	1,330	6,030

(continued)

TABLE Bf836-853 Private pension and deferred profit-sharing plans – estimated coverage, contributions, reserves, beneficiaries, and payments: 1930-1970 *Continued*

Sources

U.S. Social Security Administration, *Social Security Bulletin* 22 (4) (1959): 12; 29 (4) (1966): 11; and 35 (4) (1972): 20. These series were compiled by the U.S. Social Security Administration from releases of the Institute of Life Insurance, U.S. Securities and Exchange Commission (SEC), U.S. Department of Labor, Internal Revenue Service, and various other reports, such as those of nonprofit organizations and the annual statements of the leading life insurance companies writing group annuities. Information was also received from various industrial concerns. In addition, for the earlier years, M. W. Latimer's studies were utilized; see M. W. Latimer, *Industrial Pension Systems in the United States and Canada* (Industrial Relations Counselors, 1932).

Documentation

These series present estimates with respect to formal private pension and deferred profit-sharing plans. Included are plans covering employees of industrial and nonprofit organizations. Most of them are funded, although some of the noninsured plans are on a pay-as-you-go basis. The majority are single-employer plans with an increasing number of industry-wide or area-wide multiemployer plans.

Under insured plans, insurance carriers are the medium through which benefits are provided; sponsors of the plans pay premiums to these carriers. Under noninsured plans, the sponsors themselves perform the functions of insurance carriers.

Series Bf836-838. Excludes annuitants and potential members who have not yet met the entrance requirements (age and/or service). Employees under

both insured and noninsured plans are included only once – under the insured plans. The larger groups under insured plans are covered by group annuity contracts, whereas individual-policy pension trusts cover smaller groups.

Series Bf839-844. Contributions to insured plans are on a net basis, with dividends and refunds deducted. Contributions to noninsured plans are, for the most part, on a gross basis, refunds appearing as benefit payments. For pay-as-you-go plans, contributions have been assumed to equal benefit payments.

Series Bf846. Reserves for insured plans were furnished to the Social Security Administration by the Institute of Life Insurance.

Series Bf847. Reserves for noninsured plans include those of corporate pension plans, obtained from releases of the SEC. To these were added estimated reserves of noninsured nonprofit organization and multiemployer plans.

Series Bf848-850. Covers those in receipt of periodic payments at the end of the year, thus excluding those receiving lump sums during the year.

Series Bf852. Net amounts.

Series Bf853. Payments for the noninsured plans were obtained by adding to the SEC data the estimated payments under formal pay-as-you-go plans and under noninsured multiemployer and nonprofit organization plans. The data from the SEC include lump sums and refunds from corporate pension funds (types not segregated). Therefore, dividing the payments for the year by the mean number of beneficiaries results in an overstatement of the average annual periodic payment.

TABLE Bf854-863 Short-term disability programs – benefits provided for income loss from sickness, by type of insurance: 1948-1983

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Benefits provided as protection against income loss from short-term sickness									
	Estimated income loss from nonoccupational short-term sickness					Group benefits				
	Workers in private industry					Publicly operated cash-sickness funds				
	Through individual insurance		Private cash-sickness insurance and self-insurance		Total	Sick leave		Sick leave for government employees		Old-Age, Survivors, and Disability Insurance program (sixth month of disability)
Bf854	Bf855	Bf856	Bf857	Bf858	Bf859	Bf860	Bf861	Bf862	Bf863	Million dollars
1948	4,582	761	141	620	361	146	57	158	259	—
1949	4,445	848	150	698	398	172	62	164	300	—
1950	4,816	942	153	789	474	231	63	180	315	—
1951	5,494	1,153	157	996	606	344	61	201	390	—
1952	5,834	1,304	177	1,127	674	382	75	218	453	—
1953	6,163	1,413	209	1,204	722	397	91	235	481	—
1954	6,114	1,478	230	1,248	747	399	103	245	500	—
1955	6,565	1,620	250	1,370	825	442	109	273	545	—
1956	7,052	1,806	278	1,528	937	525	114	299	591	—
1957	7,386	1,958	307	1,651	1,024	567	127	330	626	—
1958	7,477	2,093	353	1,740	1,044	556	141	346	696	—
1959	7,749	2,236	390	1,847	1,123	601	164	359	724	—
1960	8,591	2,430	393	2,037	1,211	638	172	400	826	—
1961	8,664	2,561	426	2,135	1,241	626	195	420	894	—
1962	9,653	2,776	419	2,358	1,355	671	212	472	1,003	—
1963	10,213	2,997	447	2,550	1,445	675	244	526	1,105	—
1964	10,296	3,101	484	2,617	1,485	716	264	505	1,133	—
1965	11,333	3,349	483	2,866	1,602	767	269	566	1,264	—
1966	12,268	3,637	513	3,124	1,735	843	273	619	1,389	—
1967	12,844	3,898	527	3,371	1,834	869	285	680	1,537	—
1968	14,585	4,622 ¹	609	4,013	2,247	1,124	320	803	1,766	—
1969	15,307	5,104	635	4,469	2,551	1,247	374	930	1,918	—
1970	16,757	5,888	694	5,194	2,953	1,476	411	1,066	2,242	—
1971	17,146	6,137	731	5,406	3,030	1,489	411	1,130	2,376	—
1972	19,507	6,874	772	6,102	3,390	1,614	412	1,364	2,712	—
1973	21,059	7,461	795	6,666	3,650	1,736	446	1,469	2,906	110
1974	21,804	8,232	851	7,381	4,144	2,024	485	1,634	3,107	130
1975	23,595	9,003	973	8,030	4,328	2,011	538	1,779	3,542	160
1976	26,447	9,819	881	8,938	4,900	2,267	581	2,052	3,868	170
1977	28,225	10,559	940	9,619	5,285	2,344	582	2,359	4,145	190
1978	32,811	11,751	1,210	10,541	5,782	2,403	609	2,770	4,579	180
1979	36,072	13,371	1,322	12,049	6,987	3,216	699	3,072	4,892	170
1980	38,529	14,426	1,280	13,146	7,633	3,271	770	3,593	5,337	175
1981	41,278	15,113	1,291	13,822	8,011	2,959	953	4,099	5,640	170
1982	42,558	16,269	1,595	14,674	8,498	2,931	987	4,581	6,026	150
1983	45,615	16,411	1,152	15,259	8,615	2,708	1,007	4,899	6,490	157

¹ Data in the original source have been corrected or revised.

Sources

Daniel N. Price, "Cash Benefits for Short-Term Sickness: Thirty Five Years of Data, 1948–83," *Social Security Bulletin* 45 (5) (1986): 5–19. A new series using different methodologies was developed in the 1990s; see Table Bf864–874.

Documentation

Protection against loss of earnings in periods of nonoccupational disability is provided in a number of ways. For wage and salary workers in private industry, the most common method is through group or individual insurance policies sold by commercial insurance companies that pay cash amounts during specified periods of disability. Employers may also self-insure, providing either cash benefits or paid sick leave. Some unions, union management trust funds, fraternal societies, and mutual benefit associations also pay cash disability benefits. In addition, employers often use a paid-sick leave plan to supplement benefits under insurance plans, and workers may, as individuals, purchase insurance to supplement the protection provided through their jobs. Private insured protection may be obtained through voluntary action by the employer or the employee, or it may come about as the result of compulsory programs. For further discussion and more detailed information see the original source.

Nonoccupational short-term sickness is defined as short-term or temporary non-work-connected disability (lasting not more than six months) and the first six months of long-term disability.

Beginning in 1959, the data are adjusted to reflect changes in sickness experience (average number of days of disability), as reported in the Health Interview Survey of the Public Health Service. Income loss was estimated by multiplying the annual payroll by estimated average number of days lost as a result of sickness and dividing by the average number of workdays in the year. The average days lost assumed for wage and salary workers was 7; for federal government employees was 8; and for state and local government employees was 7.5 for 1948–1966, 7.35 for 1967, 7.2 for 1968, and 7 for 1969–1983; and for self-employed was 7. Estimated workdays were 255, 260, 255, and 300, respectively. Payroll information for groups came from the U.S. Department of Commerce estimates of payrolls and for self-employed of annual farm and nonfarm proprietors' income. See source for more detail.

Series Bf855. The sum of series Bf856–857 and Bf863.

Series Bf857. The sum of series Bf858 and Bf862.

Series Bf858. The sum of series Bf859–861.

Series Bf859. Private cash sickness insurance and self-insurance includes a small but undetermined amount of group disability insurance benefits paid to government workers and to self-employed persons through farm, trade, or professional association.

Bf863. Calculated by subtracting series Bf858 and Bf862 from series Bf857.

TABLE Bf864-874 Short-term disability programs – cash benefits provided for income loss, by type of insurance: 1970-1994

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	Benefits provided as protection against short-term income loss									
	Employment-related benefits									
	For workers in private sector					For workers in public sector				
Estimated total income loss due to injury or illness for wage and salary workers	Total	Old-Age, Survivors, and Disability Insurance program (sixth month of disability)	Obtained through individual insurance	Total	Total	Private cash-sickness insurance and self-insurance	Publicly operated cash-sickness funds	Employment-related sick leave	Workers' compensation	Sick leave for government employees
Bf864	Bf865	Bf866	Bf867	Bf868	Bf869	Bf870	Bf871	Bf872	Bf873	Bf874
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
1970	13,635	8,556	—	7,784	4,196	1,476	411	2,309	928	2,660
1975	20,439	13,164	160	12,031	5,997	2,011	538	3,448	2,037	3,998
1980	33,746	21,910	175	20,455	9,984	3,271	770	5,943	4,430	6,041
1985	48,484	29,840	195	27,849	12,440	2,601	1,179	8,660	6,922	8,487
1986	—	31,256	194	1,774	29,288	2,275	1,255	9,183	7,594	8,982
1987	—	34,509	220	2,062	14,275	2,692	1,696	9,887	8,361	9,591
1988	60,185	37,255	207	34,992	15,391	2,903	1,779	10,710	9,335	10,266
1989	63,862	40,167	224	37,492	16,364	2,732	1,907	11,725	10,161	10,967
1990	68,296	42,925	274	39,950	16,834	2,711	2,269	11,855	11,242	11,873
1991	69,542	45,378	311	42,480	17,555	2,605	2,817	12,133	12,388	12,537
1992	73,783	48,402	396	44,509	18,456	2,703	2,975	12,778	12,937	13,115
1993	76,816	48,317	403	44,355	18,310	2,608	2,349	13,353	12,429	13,616
1994	81,101	49,374	412	45,699	19,039	2,558	2,370	14,111	12,500	14,160

Sources

Wilmer Kerns, "Cash Benefits for Short-Term Sickness, 1970-1994," *Social Security Bulletin* 60 (1) (1997): 49-53. The Social Security Disability Insurance benefits, series Bf865, are from the *Annual Statistical Supplement of the Social Security Bulletin*, Table 6.C1.

Documentation

These series are estimated using methods different from those in Table Bf854-863. Short-term disability programs are designed to provide income, continuing up to six months, for workers who are unable to perform their jobs because of temporary illness or injury. If the injury or illness requires a prolonged absence from work, this short-term income serves as a bridge between employment and long-term disability benefits. Income replacement for short-term disability is available through a variety of private employment plans and in several states through mandatory public programs (see the text for Table Bf290-325). The Social Security Disability Insurance program now provides monthly benefits to severely disabled insured workers and their dependents after a waiting period of five calendar months. Sickness or injury that occurs outside of the workplace, and is non-job-related, is classified as

nonoccupational illness. Three programs protect workers from this kind of illness: temporary disability insurance in certain states; paid sick leave, and employment-related group insurance. Some individuals also purchase individual insurance policies. Another class of income protection is provided by workers' compensation programs, which cover job-related illnesses or occupational illnesses. For further discussion of methods of estimation, see the original source.

Series Bf864. Assumes the following days of work loss per employee and work days per year: 5.3 days in a 255-day work year for persons employed in the private sector; 8 days in a 260-day work year for federal public employees; 7 days in a 255-day work year for state and local public employees; and 7 days in a 300-day work year for the self-employed.

Series Bf865. The sum of series Bf866-868.

Series Bf868. The sum of series Bf869 and Bf873-874.

Series Bf869. The sum of series Bf870-872.

TABLE Bf875-886 Health care expenditures, by source of funds: 1960-1997

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	From private funds						From public funds					
	Consumer payments						By type of government			By program		
	Total	Total	Total	From private			Total	Federal	State and local	Medicaid	Medicare	From public funds besides Medicare and Medicaid
				Out of pocket	health insurance	Other						
Bf875	Bf876	Bf877	Bf878	Bf879	Bf880	Bf881	Bf882	Bf883	Bf884	Bf885	Bf886	
Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars	
1960	26,850	20,203	18,945	13,067	5,878	1,258	6,648	2,914	3,734	0	0	6,648
1961	28,768	21,466	20,015	13,373	6,642	1,450	7,302	3,327	3,976	0	0	7,302
1962	31,268	23,291	21,603	14,227	7,376	1,688	7,977	3,787	4,190	0	0	7,977
1963	34,067	25,343	23,537	15,537	7,999	1,807	8,724	4,231	4,493	0	0	8,724
1964	37,647	28,290	26,198	17,252	8,946	2,093	9,356	4,460	4,896	0	0	9,356
1965	41,145	30,867	28,565	18,540	10,026	2,302	10,278	4,820	5,458	0	0	10,278
1966	45,263	31,600	29,182	18,839	10,344	2,418	13,663	7,614	6,049	1,311	1,846	10,506
1967	50,969	31,964	29,477	18,826	10,651	2,487	19,005	12,106	6,899	3,157	4,939	10,909
1968	57,684	35,879	32,940	20,771	12,169	2,940	21,804	14,190	7,615	3,558	6,240	12,006
1969	64,792	40,247	36,554	22,715	13,839	3,693	24,545	16,049	8,496	4,194	7,070	13,281
1970	73,243	45,537	41,184	24,901	16,283	4,353	27,706	17,816	9,890	5,316	7,700	14,690
1971	81,018	49,829	44,960	26,405	18,555	4,869	31,189	20,403	10,786	6,728	8,470	15,991
1972	90,943	55,808	50,296	28,989	21,307	5,512	35,135	22,974	12,161	8,350	9,360	17,425
1973	100,838	61,550	55,892	31,954	23,938	5,658	39,288	25,199	14,089	9,463	10,778	19,047
1974	114,265	67,667	61,656	34,837	26,818	6,012	46,597	30,575	16,022	11,116	13,485	21,996
1975	130,727	75,695	69,363	38,094	31,269	6,332	55,032	36,407	18,625	13,497	16,396	25,139
1976	149,856	87,434	79,799	41,938	37,861	7,634	62,422	42,952	19,470	15,248	19,764	27,410
1977	170,375	100,158	92,262	46,405	45,858	7,896	70,217	47,693	22,524	17,534	22,973	29,710
1978	190,601	111,048	102,247	49,733	52,513	8,802	79,553	54,325	25,228	19,542	26,763	33,248
1979	215,201	125,054	115,252	54,317	60,936	9,802	90,147	61,384	28,763	22,416	31,037	36,694
1980	247,273	142,493	130,011	60,254	69,758	12,482	104,780	71,958	32,823	26,135	37,516	41,129
1981	286,908	165,715	150,677	68,492	82,185	15,039	121,193	83,711	37,482	30,378	44,883	45,932
1982	322,978	188,397	170,852	75,448	95,404	17,545	134,581	93,038	41,543	32,117	52,470	49,994
1983	355,291	207,746	188,480	82,319	106,162	19,266	147,545	103,126	44,419	35,333	59,761	52,451
1984	390,077	229,938	210,057	90,857	119,200	19,880	160,139	113,207	46,932	38,249	66,446	55,444
1985	428,721	254,518	233,504	100,659	132,846	21,014	174,202	123,171	51,032	41,253	72,084	60,865
1986	461,229	271,398	248,636	108,081	140,555	22,762	189,831	132,634	57,197	45,542	76,838	67,451
1987	500,502	293,291	268,498	116,053	152,446	24,793	207,211	143,096	64,115	50,419	82,711	74,081
1988	560,379	334,251	305,518	127,458	178,060	28,733	226,127	156,359	69,769	55,118	90,100	80,909
1989	623,536	371,413	341,673	133,208	208,466	29,740	252,123	174,766	77,357	62,250	102,423	87,450
1990	699,361	416,187	384,587	145,032	239,554	31,601	283,174	195,181	87,993	75,373	111,496	96,305
1991	766,783	448,859	415,072	153,335	261,737	33,787	317,923	222,550	95,374	93,942	121,138	102,843
1992	836,537	483,553	447,247	161,758	285,490	36,306	352,984	251,759	101,225	106,370	136,164	110,450
1993	898,496	513,172	473,850	167,051	306,800	39,322	385,323	275,353	109,970	121,748	148,702	114,873
1994	947,717	524,908	483,610	168,502	315,109	41,298	422,810	301,171	121,638	134,592	166,883	121,335
1995	993,725	538,507	495,273	170,991	324,282	43,235	455,218	325,989	129,229	146,105	185,220	123,893
1996	1,042,522	561,141	515,233	178,124	337,108	45,908	481,382	348,009	133,373	154,106	200,086	127,190
1997	1,092,385	585,312	535,571	187,551	348,020	49,741	507,073	367,050	140,023	159,890	214,569	132,614

Source

Internet site of the Health Care Financing Administration, National Health Care Expenditures. See also U.S. Department of Health and Human Services, Health Care Financing Administration, Office of Research and Demonstrations, *Health Care Financing Review, Statistical Supplement* (1998).

Documentation

Substantially more detail on health care expenditures is available from the source. For earlier sources using a different methodology and some differing categories for the period 1929, 1935, 1940, 1945, 1950, 1955, 1960-1975, see Ida C. Merriam, "Social Welfare Expenditures, 1964-5," *Social Security Bulletin* 28 (10) (1965): 10, and Alfred M. Skolnik and Sophie R. Dales, "Social Welfare Expenditures, Fiscal Year, 1974," *Social Security Bulletin* 38 (1) (1935): 15.

Since 1964, the U.S. Department of Health and Human Services has published an annual series of statistics presenting total national health expenditures during each year. The basic aim of these statistics, termed national health accounts (NHA), is to "identify all goods and services that can be characterized as relating to health care in the nation, and determine the

amount of money used for the purchase of these goods and services" (D. Rice, B. Cooper, and R. Gibson, "U.S. National Health Accounts: Historical Perspectives, Current Issues, and Future Projections," in Emile Levy, editor, *La Santé Fait ses Comptes (Accounting for Health)* (Economica, 1982)). The essential framework for the accounts consists of a matrix of operational categories classifying and defining the sources of health care dollars and services purchased with these funds. The NHA are compatible with the national income and product accounts generally, but bring together in one place a picture of the nation's health economy.

Out-of-pocket expenditure includes direct spending by consumers for all health care goods and services. Included in this estimate is the amount paid out of pocket for services not covered by insurance, the amount of coinsurance and deductibles required by private health insurance and by public programs such as Medicare and Medicaid (and not paid by some other third party), and the payment to providers for services and goods that exceed the usual, customary, or reasonable charges reimbursed by third parties. Enrollee premiums for private health insurance and Medicare Supplementary Medical Insurance (SMI) are not included with under out-of-pocket expenditures.

(continued)

TABLE Bf875–886 Health care expenditures, by source of funds: 1960–1997 *Continued*

Counting the cost of the premiums and the benefits that are paid by the insurer would overstate the funding received by the provider of care. Similarly, coinsurance and deductible amounts paid by supplementary medigap policies are excluded. For most services, out-of-pocket spending estimates for 1980 through 1989 are based on information from the consumer expenditure (CE) survey conducted by the Department of Labor. Sources other than the CE are used for other categories.

Surveys of the non-institutional population's health care use and financing patterns have been conducted periodically over the past three decades. For 1963 and 1970, the Center for Health Administration Studies and the National Opinion Research Center, both at the University of Chicago, surveyed individuals for the purpose of providing "reliable and valid statistics of medical care use and expenditures for . . . public policy and research activities" (Research Triangle Institute, *Benchmark Studies of the National Health Accounts*, HCFA contract number 500-86-0042, prepared for the Health Care Financing Administration, March 1987). These studies were followed in 1977 by the National Medical Care Expenditure Survey (National Center for Health Services Research, *Department of Health and Human Services: Data from the National Medical Care and Utilization Survey (1977)*) and in 1980 by the National Medical Care and Utilization Survey (National Center for Health Statistics, *Department of Health and Human Services: Data from the National Medical Care Utilization and Expenditure Survey (1980)*). (Expenditure information from the national medical expenditure survey covering 1987 recently became available. Data from this source will be integrated into the NHA during the next benchmark revision.) These surveys have provided information used to determine the amount of out-of-pocket spending in historical periods.

At the NHE level, private health insurance expenditures equal the premiums earned by private health insurers. This figure is decomposed to benefits incurred (personal health care expenditures) and net cost, the difference between premiums and benefits. In addition to the traditional insurers such as commercial carriers and Blue Cross and Blue Shield, the NHA category for private health insurance includes a number of other plans. Health maintenance organizations are included here, as are self-insured plans. Estimates of private health insurance benefits by type of service were developed in conjunction with out-of-pocket spending. Both relied on periodic historical surveys to determine the relative share of private health insurance and out-of-pocket spending. Surveys by medical trade associations, the Visiting Nurse Association, and the federal government augmented the person survey data. Estimates of total premiums earned by private health insurers are derived from the data series on the financial experience of private health insurance organizations compiled and analyzed by the Health Care Financing Administration (HCFA) (R. H. Arnett and G. Trapnell, "Private Health Insurance: New Measures of a Complex and Changing Industry. *Health Care Financing Review* 6 (2) (1984)). Data for these estimates are furnished by the Health Insurance Association of America, the National Underwriter Company, Blue Cross and Blue Shield Association, Group Health Association of America,

and a survey of self-insured and prepaid health plans conducted by HCFA. These estimates are verified using the Bureau of Labor Statistics (1980–1990) employment cost index and CE survey.

Estimates of Medicare spending for health services and supplies are based on information received from Medicare actuaries, reports submitted by Medicare contractors, and administrative and statistical records. Medicaid estimates are based primarily on financial information reports filed by the state Medicaid agencies on Form HCFA-64. These reports provide total program expenditures and service distributions. Prior to the availability of the Form HCFA-64 in 1979, state statistical reports (Form HCFA-2082) were used to develop service distributions. The federal share of Medicaid spending was taken from federal budget outlay data (Executive Office of the President, 1960–1991; Bureau of Government Financial Operations, 1960–1991) For further information, see the Center for Medicare and Medicaid Services Web site. Several adjustments to reported program data are necessary to fit the estimates into the framework of the NHA. An estimate of Medicaid buy-ins to Medicare is deducted to avoid double counting when the programs are presented together. An estimate of hospital-based home health care spending is added to hospital care expenditures and subtracted from home health care expenditures. That portion of reported program expenditures for intermediate care facilities for the mentally retarded estimated to cover services in hospital-based facilities (40 percent of the total) is counted as hospital care rather than nursing home care.

All health care expenditures that are channeled through any program established by public law are treated as a public expenditure in the NHA. For example, expenditures under workers' compensation programs are included with government expenditures, even though they involve benefits paid by insurers from premiums that have been collected from private sources. Similarly, premiums paid by enrollees for Medicare SMI are treated as public, rather than private, expenditure because payment of benefits is made by a public program. However, Medicare coinsurance and deductibles are included under out-of-pocket payments because they are paid directly by the beneficiary to the provider of service.

To be included in the NHA, a program must have provision of care or treatment of disease as its primary focus. For this reason, nutrition, sanitation, and antipollution programs are excluded. Another example of this is "Meals on Wheels," which is excluded from the NHA because it is viewed as a nutrition program rather than a health service program. Statistics on federal program expenditures are based, in part, on data reported by the budget offices of federal agencies. Several differences exist from spending reported in the federal budget because of the conceptual framework on which the NHA are based.

Series Bf875. The sum of series Bf876 and Bf881.

Series Bf876. The sum of series Bf878–880.

Series Bf881. The sum of series Bf882–883. It is also the sum of series Bf884–886.

TABLE Bf887-892 Private health insurance – persons insured, by type of insurer: 1940-1995

Contributed by Price V. Fishback and Melissa A. Thomasson

Year	By insurance companies				Blue Cross and Blue Shield plans	Other plans
	Total	Total	Group policies	Individual/family policies		
	Bf887	Bf888	Bf889	Bf890		
	Million	Million	Million	Million		
1940	12.0	3.7	2.5	1.2	6.0	2.3
1945	32.0	10.5	7.8	2.7	18.9	2.7
1950	76.6	37.0	22.3	17.3	38.8	4.4
1955	101.4	53.5	38.6	19.9	50.7	6.5
1960	122.5	69.2	54.4	22.2	58.1	6.0
1961	125.8	70.4	56.1	22.4	58.7	7.1
1962	129.4	72.2	58.1	23.1	60.1	6.9
1963	133.5	74.5	61.5	23.5	61.0	7.2
1964	136.3	75.8	63.1	34.0	62.1	6.8
1965	138.7	77.6	65.4	24.4	63.3	7.0
1966	142.4	80.4	67.8	24.9	54.3	6.6
1967	146.4	82.6	71.5	24.6	67.2	7.1
1968	151.9	85.7	74.1	25.3	70.1	7.3
1969	155.0	88.8	77.9	25.9	82.7	7.7
1970	158.8	89.7	80.5	26.7	85.1	8.1
1971	161.8	91.5	80.6	27.8	76.5	8.5
1972	164.1	93.7	81.5	29.1	78.2	8.1
1973	168.5	94.5	83.6	27.5	81.3	9.6
1974	173.1	97.0	85.4	28.8	83.8	11.1
1975	178.2	99.5	87.2	30.1	86.4	13.1
1976	176.9	97.0	86.8	27.0	86.6	14.9
1977	179.9	100.4	89.2	28.7	86.0	18.1
1978	185.7	106.0	92.5	36.1	85.8	21.5
1979	185.7	104.1	94.1	34.4	86.1	25.5
1980	187.4	105.5	97.4	33.8	86.7	33.2
1981	186.2	105.9	103.0	25.3	85.8	40.3
1982	188.3	109.6	103.9	29.4	82.0	48.2
1983	186.6	105.9	104.6	22.2	79.6	53.6
1984	184.4	103.1	103.0	20.4	79.4	54.4
1985	181.3	100.4	99.5	21.2	78.7	55.1
1986	180.9	98.2	106.6	12.1	78.0	64.9
1987 ¹	179.7	96.7	106.1	10.4	76.9	66.9
1988 ¹	182.3	92.6	100.5	10.7	74.0	71.3
1989 ²	182.5	88.9	98.7	10.0	72.5	78.6
1990 ²	181.7	83.1	88.7	10.2	70.9	86.2
1991	181.0	78.0	83.3	9.9	68.1	93.5
1992	180.7	76.6	82.1	8.5	67.5	97.9
1993	180.9	74.7	80.9	7.4	65.9	105.7
1994	182.2	75.8	82.4	7.0	65.2	112.9
1995	185.3	76.6	83.3	7.0	65.6	120.1

¹ Revised Health Insurance Association of America survey form.² Change in methodology.**Source***Source Book of Health Insurance Data* (1998), Table 2.10, p. 39.**Documentation**

This table reports information collected by the Health Insurance Association of American on the number of privately insured Americans covered through commercial insurance companies, through Blue Cross and Blue Shield plans, and under other types of policies such as health maintenance organizations and other managed care plans.

Series Bf887-888. Refers to the net total of persons protected so that duplication among persons protected by more than one insuring organization or more than one policy providing the same type of coverage has been eliminated.

Series Bf887. Excludes hospital indemnity coverage that may have been included in prior editions. For 1975 and later, data include the number of persons covered in Puerto Rico and other U.S. territories and possessions.

