CBO March 2011 baseline

Caseloads in thousands, outlays in billions of dollars

CALENDAR YEAR	2010 34,592 2,315 579 1,913 159 4,040 245 2 43,845	,513 34,592 ,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2	2011 35,646 2,289 595 1,898 158 3,991 254 2	2012 36,847 2,267 615 1,889 158 4,025 258	38,234 2,245 640 1,881 158	39,677 2,221 668	2015 41,194 2,195 698	2016 42,802 2,169 721	2017 44,470 2,144 740	2018 46,218 2,116	2019 48,039 2,086	2020 49,906	2021
Beneficiaries (December 31) Retired workers & families 33,513 Retired workers 33,513 Wives & husbands 2,344 Children 561 Survivors 1,921 Children 1,921 Mothers & fathers 160 Aged widows & widowers 238 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: Male retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers & families \$1,164 Wives & husbands \$574 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 <th>2,315 579 1,913 159 4,040 245 2 43,845</th> <th>,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2</th> <th>2,289 595 1,898 158 3,991 254</th> <th>2,267 615 1,889 158 4,025</th> <th>2,245 640 1,881</th> <th>2,221 668</th> <th>2,195</th> <th>2,169</th> <th>2,144</th> <th>2,116</th> <th>-,</th> <th></th> <th>_, _,</th>	2,315 579 1,913 159 4,040 245 2 43,845	,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2	2,289 595 1,898 158 3,991 254	2,267 615 1,889 158 4,025	2,245 640 1,881	2,221 668	2,195	2,169	2,144	2,116	-,		_, _,
Retired workers \$33,513 Wives & husbands 2,344 Children 561 Survivors 1,921 Children 1,921 Mothers & fathers 160 Aged widows & widowers 238 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 42,827 Memo: 17,067 Female retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers Retired workers & families \$1,164 Wives & husbands \$574 Children \$747 Mothers & fathers \$42 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit	2,315 579 1,913 159 4,040 245 2 43,845	,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2	2,289 595 1,898 158 3,991 254	2,267 615 1,889 158 4,025	2,245 640 1,881	2,221 668	2,195	2,169	2,144	2,116	-,		_,
Retired workers 33,513 Wives & husbands 2,344 Children 561 Survivors 1,921 Children 1,921 Mothers & fathers 160 Aged widows & widowers 238 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 17,067 Female retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers Retired workers & families \$1,164 Wives & husbands \$574 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651 <td>2,315 579 1,913 159 4,040 245 2 43,845</td> <td>,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2</td> <td>2,289 595 1,898 158 3,991 254</td> <td>2,267 615 1,889 158 4,025</td> <td>2,245 640 1,881</td> <td>2,221 668</td> <td>2,195</td> <td>2,169</td> <td>2,144</td> <td>2,116</td> <td>-,</td> <td></td> <td></td>	2,315 579 1,913 159 4,040 245 2 43,845	,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2	2,289 595 1,898 158 3,991 254	2,267 615 1,889 158 4,025	2,245 640 1,881	2,221 668	2,195	2,169	2,144	2,116	-,		
Wives & husbands 2,344 Children 561 Survivors 1,921 Mothers & fathers 160 Aged widows & widowers 2,38 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 17,067 Female retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers \$1,164 Wives & husbands \$574 Children \$570 Survivors \$42 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	2,315 579 1,913 159 4,040 245 2 43,845	,344 2,315 561 579 ,921 1,913 160 159 ,089 4,040 238 245 2 2	2,289 595 1,898 158 3,991 254	2,267 615 1,889 158 4,025	2,245 640 1,881	2,221 668	2,195	2,169	2,144	2,116	-,		
Children 561 Survivors 1,921 Mothers & fathers 160 Aged widows & widowers 4,089 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 17,067 Female retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers & families \$574 Children \$570 Survivors \$1,164 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	1,913 159 4,040 245 2 43,845	,921 1,913 160 159 ,089 4,040 238 245 2 2	1,898 158 3,991 254	1,889 158 4,025	640 1,881	668	,	,	,	,	2 086		51,627
Survivors	1,913 159 4,040 245 2 	,921 1,913 160 159 ,089 4,040 238 245 2 2	1,898 158 3,991 254	1,889 158 4,025	1,881		698	721	740		2,000	2,052	2,017
Children 1,921 Mothers & fathers 160 Aged widows & widowers 4,089 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 42,827 Memo: 17,067 Female retired workers 17,067 Female retired workers 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers & families \$574 Children \$574 Survivors \$1,164 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit bually-entitled widows \$651	159 4,040 245 2 43,845	160 159 ,089 4,040 238 245 2 2	158 3,991 254	158 4,025	,					763	788	814	833
Mothers & fathers 160 Aged widows & widowers 4,089 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 42,827 Male retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers Retired workers & families \$1,164 Wives & husbands \$574 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	159 4,040 245 2 43,845	160 159 ,089 4,040 238 245 2 2	158 3,991 254	158 4,025	,								
Aged widows & widowers 4,089 Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 42,827 Memo: 17,067 Female retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers & families \$1,164 Wives & husbands \$574 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	4,040 245 2 43,845	,089 4,040 238 245 2 2	3,991 254	4,025	158	1,874	1,871	1,868	1,867	1,866	1,867	1,869	1,87
Disabled widows & widowers 238 Parents 2 Total 42,827 Memo: 42,827 Male retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers Retired workers & families \$1,164 Wives & husbands \$574 Children \$570 Survivors \$42 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	245 2 43,845	238 245 2 2	254	,		158	158	158	158	158	158	158	158
Parents 2 Total 42,827 Memo: 17,067 Male retired workers 17,067 Female retired workers 2,782 Dually entitled as wives 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers Retired workers & families \$1,164 Wives & husbands \$574 Children \$570 Survivors \$1,124 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows	43,845	2 2 		258	4,006	3,968	3,917	3,865	3,804	3,727	3,638	3,536	3,451
Total 42,827 Memo: Male retired workers 17,067 Female retired workers Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers \$ 11,164 Wives & husbands \$574 Children \$570 Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	43,845		2		264	271	276	281	285	289	292	294	296
Memo: Male retired workers Female retired workers Dually entitled as wives Other Total, female retired workers Average benefit (December 31) Retired workers & families Retired workers & \$1,164 Wives & husbands & \$574 Children & \$570 Survivors Children & \$747 Mothers & fathers & \$842 Aged widows & widowers & \$1,124 Disabled widows & widowers & \$988 Memo: "excess" benefit Dually-entitled widows & \$651	•	,827 43,845		2	1	1	1	1	1	1	1	1	1
Male retired workers Female retired workers Dually entitled as wives Dually entitled as widows Other Total, female retired workers Average benefit (December 31) Retired workers & families Retired workers \$1,164 Wives & husbands \$574 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$988 Memo: "excess" benefit Dually-entitled widows \$651			44,833	46,062	47,431	48,839	50,310	51,866	53,469	55,138	56,868	58,629	60,253
Female retired workers Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families Retired workers \$1,164 Wives & husbands \$574 Children \$570 Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651													
Dually entitled as wives 2,782 Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families \$1,164 Wives & husbands \$574 Children \$570 Survivors \$470 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit \$651	17,582	,067 17,582	18,080	18,691	19,389	20,095	20,823	21,585	22,364	23,168	23,995	24,832	25,563
Dually entitled as widows 3,619 Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families \$1,164 Retired workers \$1,164 Wives & husbands \$574 Children \$570 Survivors \$40 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit \$651	0.007	700 0.007	0.000	0.070	0.050	0.400	0.000	0.044	0.440	0.540	0.000	0.700	0.04/
Other 10,045 Total, female retired workers 16,446 Average benefit (December 31) Retired workers & families \$1,164 Wives & husbands \$574 Children \$570 Survivors Children Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows Dually-entitled widows \$651	2,827		2,892	2,973	3,052	3,136	3,223	3,314	3,410	3,512	3,620	3,730	3,845
Total, female retired workers Average benefit (December 31) Retired workers & families Retired workers & \$1,164 Wives & husbands \$574 Children \$570 Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	3,645		3,684	3,736	3,787	3,836	3,886	3,954	4,037	4,123	4,209	4,298	4,408
Average benefit (December 31) Retired workers & families Retired workers \$1,164 Wives & husbands \$574 Children \$570 Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	10,538	,045 10,538	10,989	11,448	12,006	12,609	13,262	13,949	14,659	15,415	16,215	17,046	17,811
Retired workers & families Retired workers \$1,164 Wives & husbands \$574 Children \$570 Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	17,011	,446 17,011	17,566	18,157	18,845	19,582	20,371	21,217	22,106	23,050	24,044	25,074	26,064
Retired workers \$1,164 Wives & husbands \$574 Children \$570 Survivors \$70 Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651													
Wives & husbands \$574 Children \$570 Survivors Children \$747 Mothers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651													
Children \$570 Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	\$1,175			\$1,226	\$1,258	\$1,294	\$1,332	\$1,374	\$1,422	\$1,470	\$1,519	\$1,570	\$1,621
Survivors Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	\$580		\$592	\$604	\$619	\$635	\$653	\$672	\$694	\$715	\$737	\$759	\$780
Children \$747 Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	\$577	\$570 \$577	\$588	\$601	\$617	\$636	\$655	\$677	\$701	\$726	\$751	\$778	\$804
Mothers & fathers \$842 Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	•												
Aged widows & widowers \$1,124 Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	\$752		\$764	\$778	\$795	\$815	\$836	\$860	\$886	\$913	\$940	\$969	\$999
Disabled widows & widowers \$683 Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	\$849		\$866	\$884	\$905	\$930	\$956	\$985	\$1,018	\$1,051	\$1,085	\$1,121	\$1,158
Parents \$988 Memo: "excess" benefit Dually-entitled widows \$651	\$1,134			\$1,182	\$1,213	\$1,248	\$1,285	\$1,327	\$1,373	\$1,420	\$1,469	\$1,519	\$1,570
Memo: "excess" benefit Dually-entitled widows \$651	\$681		\$688	\$695	\$705	\$717	\$730	\$744	\$761	\$778	\$795	\$813	\$831
Dually-entitled widows \$651	\$998	5988 \$998	\$1,019	\$1,043	\$1,072	\$1,105	\$1,139	\$1,177	\$1,220	\$1,263	\$1,308	\$1,355	\$1,404
·	#050	0054 #050	4070	4000	07 40	# 700	475 0	# 700	0040	00.40	0074	4007	0000
Dually-entitled wives \$233	\$659		\$673	\$690	\$710	\$733	\$756	\$782	\$812	\$843	\$874	\$907	\$938
	\$237	5233 \$237	\$243	\$249	\$256	\$265	\$274	\$284	\$296	\$309	\$322	\$336	\$349
FISCAL YEAR													
Benefit outlays													
Retired workers & families													
Retired workers \$413.7		13.7 \$438.9	\$457.7	\$481.6	\$509.9	\$543.0	\$579.5	\$620.3	\$665.8	\$715.9	\$769.7	\$827.3	\$885.1
Wives & husbands \$23.5	\$438.9	23.5 \$24.1	\$24.3	\$24.8	\$25.4	\$26.1	\$26.9	\$27.8	\$28.9	\$30.0	\$31.2	\$32.5	\$33.8
Children \$3.7		\$3.7 \$4.0	\$4.1	\$4.4	\$4.6	\$4.9	\$5.3	\$5.7	\$6.1	\$6.4	\$6.9	\$7.4	\$7.8

(continued)

OLD-AGE AND SURVIVORS INSURANCE

CBO March 2011 baselineCaseloads in thousands, outlays in billions of dollars

	Actual	Actual	Actual										
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Benefit outlays (continued)													
Survivors													
Children	\$17.4	\$17.7	\$17.7	\$17.9	\$18.1	\$18.5	\$18.8	\$19.3	\$19.9	\$20.5	\$21.1	\$21.8	\$22.5
Mothers & fathers	\$1.6	\$1.6	\$1.6	\$1.6	\$1.7	\$1.7	\$1.8	\$1.8	\$1.9	\$1.9	\$2.0	\$2.1	\$2.1
Aged widows & widowers	\$82.6	\$84.1	\$84.4	\$86.0	\$88.7	\$91.2	\$93.6	\$96.2	\$99.2	\$102.6	\$105.7	\$108.8	\$111.8
Disabled widows & widowers	\$2.0	\$2.0	\$2.1	\$2.2	\$2.3	\$2.4	\$2.5	\$2.5	\$2.6	\$2.8	\$2.9	\$3.0	\$3.0
Parents	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
_ump-sum death	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2
Total	\$544.6	\$572.6	\$592.2	\$618.6	\$650.9	\$688.1	\$728.6	\$773.9	\$824.5	\$880.4	\$939.7	\$1,003.0	\$1,066.2
Plug	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Outlays (OMB Table 13.1)	\$544.6	\$572.5	\$592.2	\$618.6	\$650.9	\$688.1	\$728.6	\$773.9	\$824.5	\$880.4	\$939.7	\$1,003.0	\$1,066.2
Memo:													
Regular benefits	\$541.3	\$569.3	\$588.9	\$615.0	\$647.0	\$684.0	\$724.4	\$769.4	\$819.8	\$875.3	\$934.4	\$997.3	\$1,060.7
Retroactive and death benefits	\$3.3	\$3.2	\$3.3	\$3.6	\$3.9	\$4.1	\$4.2	\$4.5	\$4.7	\$5.1	\$5.3	\$5.7	\$5.5
Average caseload, fiscal year	42,001	43,110	44,108	45,177	46,442	47,822	49,247	50,741	52,311	53,933	55,619	57,359	59,008
KEY ASSUMPTIONS													
Average wage for indexing	\$40,712	\$41,798	\$43,210	\$44,684	\$45,765	\$47,690	\$49,499	\$51,344	\$53,225	\$55,387	\$57,526	\$59,583	\$61,699
Taxable maximum	\$106,800	\$106,800	\$106,800	\$110,400	\$114,300	\$118,200	\$120,900	\$126,000	\$130,800	\$135,600	\$140,700	\$146,400	\$152,100
PIA for mythical "lifelong average"													
retired worker (age 62)	\$1,510	\$1,543	\$1,540	\$1,583	\$1,643	\$1,702	\$1,747	\$1,824	\$1,897	\$1,966	\$2,038	\$2,120	\$2,202
Maximum PIA (age 62)	\$2,346	\$2,413	\$2,424	\$2,504	\$2,611	\$2,719	\$2,799	\$2,928	\$3,051	\$3,166	\$3,284	\$3,420	\$3,554
NRA for worker reaching 62 this year	66.00	66.00	66.00	66.00	66.00	66.00	66.00	66.00	66.17	66.33	66.50	66.67	66.83
Percent of PIA paid to age-62 retiree	75.0%	75.0%	75.0%	75.0%	75.0%	75.0%	75.0%	75.0%	74.2%	73.3%	72.5%	71.7%	70.8%
COLA this calendar year	0.0%	0.0%	1.1%	1.2%	1.6%	1.8%	2.0%	2.2%	2.4%	2.3%	2.3%	2.3%	2.3%
Date	Dec-09	Dec-10	Dec-11	Dec-12	Dec-13	Dec-14	Dec-15	Dec-16	Dec-17	Dec-18	Dec-19	Dec-20	Dec-21

By convention, most Social Security program statistics are by calendar year. Benefit payments in the federal government's fiscal year (October through September) roughly track figures for the preceding December--for example, regular benefits in fiscal 2010 approximately equal recipients in December 2009 times their average amount, times twelve. COLAs and a rising NRA complicate that relationship, but it remains a useful rule of thumb.

Details may not add to totals because of rounding. A few beneficiaries are not identified by sex.

Outlays reflect benefit costs only and omit other mandatory spending (chiefly the payment to railroad retirement) and discretionary (administrative) costs.

Dually-entitled retired workers are insured based on their own past earnings but qualify for a higher benefit on their spouse's (or deceased spouse's). In those cases, Social Security pays the larger amount--technically, a primary benefit plus a reduced secondary benefit. About 98% are female. They are classified as retired workers, but their benefit payments are pro-rated between the retired-worker and spouse or survivor categories.

COLA=cost-of-living adjustment, PIA=primary insurance amount, NRA="normal retirement age" (when retired worker can collect 100% of PIA).