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# Quarterly Benefit Statistics

U.S. Railroad Retirement Board  
844 North Rush Street  
Chicago, Illinois 60611-1275

*Published by Public Affairs  
and the Bureau of the Actuary and Research*

www.rrb.gov

February 2, 2021

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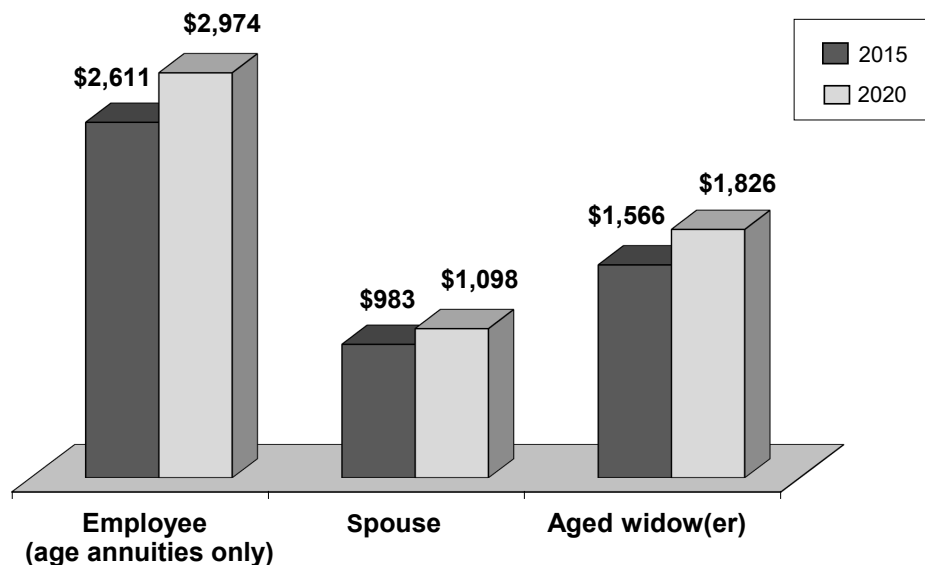
## Railroad Retirement and Unemployment Insurance Programs

Selected Current Statistics for **April - June 2020**

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**Average annuity amounts being paid,  
June 2015 and June 2020**



**Table 1: Retirement and Survivor Programs, Benefit Statistics  
April - June 2020**

Period	Employee annuities							
	Total <sup>1</sup>		Age			Supple- mental <sup>3</sup>	Spouse annuities	Divorced spouse annuities
	Monthly benefits	Monthly beneficiaries	Awarded age annuity	Disability converted to age annuity <sup>2</sup>	Disability			
<b>Number in current-payment status at end of period</b>								
June 2020	624,852	500,437	186,479	49,120	20,605	115,116	142,197	5,252
May 2020	625,945	501,247	186,688	49,068	20,782	115,402	142,311	5,264
April 2020	626,944	501,888	186,978	48,950	20,943	115,748	142,506	5,287
<b>Average amount in current-payment status at end of period</b>								
June 2020	.....	.....	\$2,973.75	\$2,617.74	\$2,868.71	\$41.50	\$1,098.19	\$703.04
May 2020	.....	.....	2,968.46	2,615.34	2,867.87	41.50	1,096.39	702.32
April 2020	.....	.....	2,966.39	2,613.60	2,868.17	41.50	1,095.95	701.68
<b>Number awarded during period</b>								
June 2020	2,028	1,859	530	.....	164	169	595	37
May 2020	1,830	1,718	448	.....	155	112	545	38
April 2020	2,020	1,909	506	.....	158	111	636	51
10/19 - 6/20	19,119	17,509	5,020	.....	1,211	1,610	5,973	474
10/18 - 6/19	21,513	19,097	5,605	.....	1,277	2,416	6,737	561
<b>Average amount awarded during period<sup>4</sup></b>								
June 2020	.....	.....	\$3,336.62	.....	\$2,923.34	\$40.35	\$1,130.20	\$738.07
May 2020	.....	.....	3,182.63	.....	2,836.06	41.21	1,112.56	793.39
April 2020	.....	.....	3,010.68	.....	2,964.00	41.68	1,099.00	713.79
<b>Benefit payments during period (thousands)<sup>5</sup></b>								
June 2020	\$1,098,182	.....	\$557,961	\$128,076	\$67,271	\$4,790	\$157,728	\$3,816
May 2020	1,094,831	.....	555,268	127,645	67,532	4,803	157,433	3,851
April 2020	1,096,165	.....	555,911	127,537	67,650	4,818	157,883	3,921
10/19 - 6/20	9,829,038	.....	4,986,594	1,137,177	610,972	43,609	1,411,265	34,439
10/18 - 6/19	9,712,675	.....	4,901,210	1,082,143	670,000	44,686	1,382,592	33,071

<sup>1</sup>Includes dependent parents' annuities. Except for benefit payment data, excludes insurance lump-sum and residual payment figures. Total benefit payments also include hospital insurance benefits for services in Canada. <sup>2</sup>A disability annuity ends when the retiree attains full retirement age, at which time the annuity converts to an age and service annuity. Consequently, these annuitants are receiving age and service annuities. Full retirement age gradually increases, from age 65 to 67, for those born between 1937 and 1960. It is age 67 for those born after 1959 and age 65 for those born before 1938. <sup>3</sup>Excludes partition payments to spouses and divorced spouses where the employee is deceased. Averages are after court-ordered partitions. <sup>4</sup>Regular employee and spouse annuity averages are preliminary estimates. <sup>5</sup>Beginning in July 2019, data is from the Monthly Treasury Statement. Prior to July 2019, data was provided by the Bureau of Fiscal Operations.

**NOTE**--MONTHLY BENEFITS in CURRENT-PAYMENT STATUS at the end of month include all benefits awarded to date and payable for the month. BENEFITS AWARDED consist of those certified for the first time on either a partial or final basis. BENEFIT PAYMENTS for a month, shown in both the benefit and financial statistics, consist of recurrent monthly checks dated the first of the month, plus retroactive and lump-sum payments made during the month, less returned checks (excluding those not yet distributed by Account), refunds of benefits paid previously, etc.

**Table 1: Retirement and Survivor Programs, Benefit Statistics  
April - June 2020 -- Continued**

Survivor benefits									
Period	Annuities					Children	Insurance lump sums	Residual payments	Partition payments <sup>7</sup>
	Aged widows and widowers	Disabled widows and widowers <sup>6</sup>	Widowed mothers and fathers	Remarried widows and widowers	Divorced widows and widowers				
<b>Number in current-payment status at end of period</b>									
June 2020	79,956	3,186	557	2,622	9,749	7,812	.....	.....	2,187
May 2020	80,218	3,205	546	2,642	9,744	7,884	.....	.....	2,176
April 2020	80,380	3,209	537	2,653	9,715	7,871	.....	.....	2,150
<b>Average amount in current-payment status at end of period</b>									
June 2020	\$1,825.59	\$1,431.90	\$1,969.58	\$1,186.29	\$1,199.11	\$1,190.94	.....	.....	\$323.83
May 2020	1,820.56	1,430.35	1,963.92	1,182.95	1,196.76	1,193.54	.....	.....	323.41
April 2020	1,815.82	1,429.49	1,953.68	1,180.95	1,196.01	1,191.76	.....	.....	323.22
<b>Number awarded during period</b>									
June 2020	429	6	10	3	46	39	133	----	.....
May 2020	453	3	7	1	42	26	137	----	.....
April 2020	441	9	4	9	60	35	149	1	.....
10/19 - 6/20	3,886	59	66	58	490	272	1,414	2	.....
10/18 - 6/19	3,843	71	70	81	556	296	1,642	3	.....
<b>Average amount awarded during period<sup>4</sup></b>									
June 2020	\$2,369.08	\$1,641.28	\$1,755.62	\$1,678.70	\$1,319.00	\$1,571.32	\$964	----	.....
May 2020	2,339.09	1,667.13	2,216.54	2,425.00	1,289.79	1,638.64	935	----	.....
April 2020	2,379.73	1,396.72	1,383.02	1,428.00	1,380.36	1,575.47	949	\$560	.....
<b>Benefit payments during period (thousands)<sup>5</sup></b>									
June 2020	\$146,861	\$4,778	\$1,138	\$3,124	\$11,791	\$9,989	\$133	----	\$709
May 2020	146,840	4,669	1,136	3,126	11,723	9,956	134	----	698
April 2020	146,699	4,813	1,054	3,158	11,771	10,024	149	\$1	760
10/19 - 6/20	1,320,347	43,268	10,225	28,506	104,973	89,771	1,359	1	6,357
10/18 - 6/19	1,317,701	43,436	10,929	29,344	101,582	88,429	1,598	6	5,760

<sup>6</sup>Number and average in current-payment status, and benefit payments during period, includes annuities to disabled widow(er)s age 60 and over now payable as aged widow(er)s' annuities. <sup>7</sup>Limited to partition payments to spouses and divorced spouses where the employee is deceased or not otherwise entitled to an annuity. Partition payments from employees on the rolls are included with the employees' annuities.

**NOTE**--(Continued from previous page.)

FOR WIDOWS and WIDOWERS aged 60 and over and WIDOWED MOTHERS and FATHERS, the number of benefits being paid and benefit payments include benefits temporarily being continued at spouse annuity rates, pending award of survivor annuities.

INSURANCE LUMP SUMS and RESIDUAL PAYMENTS are each counted only once with respect to an employee's death even though divided among 2 or more persons. Award data for insurance lump sums exclude deferred benefits, i.e., those payable a year after the employee's death.

Data on benefit payments are for CALENDAR MONTHS; all other data are for ACCOUNTING MONTHS ending on approximately the 29th of each month.

**Table 2: Retirement and Survivor Programs, Financial Statistics**  
**April - June 2020 (In thousands)**  
**Cash Basis**

Item	June 2020	May 2020	April 2020	October 2019 - June 2020	October 2018 - June 2019
<b>SOCIAL SECURITY EQUIVALENT BENEFIT ACCOUNT</b>					
<b>Income</b>					
Payroll taxes <sup>1</sup>	\$166,266	\$151,819	\$174,280	\$1,829,551	\$2,160,944
Income tax transfers <sup>2</sup>	.....	.....	72,000	211,000	194,000
Financial interchange advances <sup>3</sup>	489,002	395,587	389,480	3,428,176	3,172,743
RRB-SSA financial interchange transfer	4,987,747	.....	.....	4,987,747	4,946,429
Interest on investments <sup>4</sup>	1,536	1,707	1,757	-13,490	18,734
<b>Outgo</b>					
Benefit payments	\$627,589	\$627,338	\$628,693	\$5,629,780	\$5,540,862
Repayment of financial interchange advances <sup>3</sup>	4,458,194	.....	.....	4,458,194	4,202,365
RRB-CMS financial interchange transfer	606,449	.....	.....	606,449	570,285
Transfer to Railroad Retirement Account <sup>5</sup>	.....	.....	.....	.....	.....
Administrative expenses <sup>6</sup>	1,909	1,909	2,452	21,252	24,510
Funding for Office of Inspector General	185	185	185	1,833	2,148
<b>RAILROAD RETIREMENT ACCOUNT</b>					
<b>Income</b>					
Payroll taxes <sup>1</sup>	\$208,535	\$196,571	\$228,132	\$2,113,738	\$2,439,668
Income tax transfers <sup>2</sup>	.....	.....	101,000	302,000	370,000
Reimbursements for payment of SSA benefits	166,305	166,088	166,632	1,481,486	1,415,505
Transfers from National RR Investment Trust <sup>5</sup>	250,000	69,000	160,000	1,569,000	1,337,000
Transfer from SSEB Account <sup>5</sup>	.....	.....	.....	.....	.....
Interest on investments <sup>4</sup>	907	1,386	1,292	-21,409	11,159
<b>Outgo</b>					
Benefit payments	\$469,475	\$466,352	\$466,314	\$4,188,535	\$4,158,693
Payments of SSA benefits	166,152	166,109	166,348	1,480,560	1,413,858
Administrative expenses <sup>6</sup>	5,751	5,751	7,388	63,964	63,181
Funding for Office of Inspector General	558	558	558	5,530	5,397
<b>NATIONAL RAILROAD RETIREMENT INVESTMENT TRUST</b>					
<b>Cash and investment balance at end of period<sup>7</sup></b>	\$23,717,491	\$23,427,797	\$22,889,578	\$23,717,491	\$25,603,676
<b>DUAL BENEFITS PAYMENTS ACCOUNT <sup>8</sup></b>					
<b>Vested dual benefit payments</b>	\$1,118	\$1,141	\$1,158	\$10,723	\$13,119

<sup>1</sup>Net of U.S. Treasury adjustments for payroll tax refunds to certain carriers and their employees for prior periods. <sup>2</sup>Amounts include U.S. Treasury adjustments for prior period income tax reconciliations. <sup>3</sup>Includes interest. <sup>4</sup>Net of adjustments for payroll tax refunds (see note 1). <sup>5</sup>Under the Railroad Retirement and Survivors' Improvement Act of 2001, as amended, the portion of the RR Account not needed to pay current administrative expenses is to be transferred to the National Railroad Retirement Investment Trust (Trust). The Trust may transfer funds back to the RR Account for payment of benefits. The balance of the SSEB Account not needed to pay current benefits and administrative expenses is to be transferred to the Trust or to the RR Account. <sup>6</sup>Prior to fiscal year 2019, reflects adjustments for prior periods. <sup>7</sup>Source: National Railroad Retirement Investment Trust. <sup>8</sup>Total vested dual benefits paid during a fiscal year are limited to the amount appropriated to the Dual Benefits Payments Account for that year. Any amounts not spent are returned to the U.S. Treasury. The benefit appropriation, including income tax transfers, for fiscal years 2019 and 2020 was \$19.0 and \$16.0 million, respectively.

**NOTE--This Table has been revised to only include information from the Monthly Treasury Statements and other resources within the Railroad Retirement Board's Bureau of the Actuary and Research.**

**Table 3: Unemployment and Sickness Programs, Benefit Statistics  
April - June 2020**

Period	Normal benefit accounts			Beneficiaries		
	Applications received	Opened	Exhausted	Total	Normal benefits	Extended benefits
<b>Unemployment<sup>1</sup></b>						
June 2020	15,987	4,970	536	14,472	14,137	452
May 2020	7,200	4,628	478	12,082	11,660	510
April 2020	5,940	1,421	442	6,879	6,317	676
7/19 - 6/20	43,886	21,735	3,408	23,061	22,974	1,237
7/18 - 6/19	12,215	7,031	1,744	7,865	7,767	1,011
<b>Sickness</b>						
June 2020	1,453	890	297	4,550	3,974	730
May 2020	1,643	921	317	4,718	4,019	870
April 2020	2,019	855	337	4,817	3,830	1,183
7/19 - 6/20	19,798	14,118	3,334	15,375	15,242	2,348
7/18 - 6/19	17,927	13,765	2,994	14,351	14,201	2,208

Period	Number of payments			Averages <sup>1</sup>		
	Total	Normal benefits	Extended benefits	Benefit days	Benefit per week <sup>2</sup>	Benefit payments <sup>2, 3</sup> (thousands)
<b>Unemployment</b>						
June 2020	31,227	30,183	1,044	9.1	\$368.55	\$20,566
May 2020	22,444	21,495	949	8.5	371.45	14,110
April 2020	10,553	9,297	1,256	8.6	364.65	8,140
7/19 - 6/20	137,415	130,387	7,028	8.9	366.70	97,378
7/18 - 6/19	52,326	46,483	5,843	9.0	358.20	37,994
<b>Sickness</b>						
June 2020	8,537	7,031	1,506	8.6	\$363.20	\$6,215
May 2020	8,509	6,815	1,694	8.5	363.95	6,215
April 2020	8,944	6,615	2,329	8.6	364.70	6,437
7/19 - 6/20	108,430	95,219	13,211	8.8	368.75	79,968
7/18 - 6/19	102,104	89,509	12,595	8.8	362.15	73,492

<sup>1</sup> Benefit days--average benefit days per registration period. Benefit per week--equal to 5 times average daily benefit.

<sup>2</sup> In accordance with the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, amounts reflect a reduction of 6.8% under sequestration for days of unemployment and sickness after September 30, 2015, 6.9% for days after September 30, 2016, 6.6% for days after September 30, 2017, 6.2% for days after September 30, 2018, and 5.9% for days after September 30, 2019.

<sup>3</sup> Prior to July 2019, unemployment and sickness benefit payments were based on net amounts. Beginning in July 2019, that data is no longer available. Benefit payments for 2018 and 2019 have been adjusted to reflect gross amounts.

**NOTE.** --Beginning in May 2020, RUIA claimants have also been paid under the Coronavirus Aid, Relief, and Economic Security Act of 2020.

- In May 2020, \$4,100,000 in Special Extended Unemployment Benefits were paid to 1,900 beneficiaries, in addition to \$31,900,000 in Enhanced Benefits paid to 12,600 beneficiaries.

- In June 2020, \$3,600,000 in Special Extended Unemployment Benefits were paid to 1,900 beneficiaries, in addition to \$45,500,000 in Enhanced Benefits paid to 16,100 beneficiaries.

**GENERAL NOTES.** --An unemployment claimant files only one APPLICATION for a benefit year. A sickness claimant files an APPLICATION at the beginning of each period of continuing sickness.

NORMAL BENEFIT ACCOUNTS are opened when the first payment is made.

The number of BENEFICIARIES is the count of persons receiving unemployment or sickness benefits in the period. Those receiving both normal and extended benefits for unemployment or sickness are counted only once in the total for each type.

PAYMENTS generally cover 14-day registration periods. Benefits are payable for days over 7 during an employee's first 14-day registration period.

-- Sickness benefits are paid for days of sickness after the 4th consecutive day of sickness in the first claim in each period of continuing sickness; for subsequent registration periods in the same period of continuing sickness, payments are made for all days of sickness over 4 whether or not consecutive.

-- Unemployment benefits are paid for days of unemployment over 4. However, in the case of unemployment benefits due to a legal authorized strike, unemployment benefits are not paid until after a 14-day waiting period. Non-strikers unemployed due to an illegal strike must also serve a 14-day waiting period.

## Table 4: Benefits and Beneficiaries -- June 2020

### RETIREMENT - SURVIVOR

<b>Total benefit payments - cash basis (unaudited)<sup>1</sup></b>	\$1,098,182,000
Regular and Supplemental benefits	1,097,064,000
Vested dual benefits	1,118,000

	Number	Average
<b>Total benefits being paid at end of month</b>	625,000	.....
Retired employees':		
Regular	256,000	\$2,897
Supplemental	115,000	42
Spouses' and divorced spouses'	147,000	1,084
Aged widows' and widowers'	80,000	1,826
Other benefits	26,000	1,167
<b>Total beneficiaries being paid at end of month</b>	500,000	.....

### UNEMPLOYMENT - SICKNESS

	Unemployment	Sickness
<b>Gross benefit payments<sup>1,2</sup></b>	\$20,600,000	\$6,200,000
<b>Beneficiaries</b>	14,500	4,600
<b>Average payment per week<sup>2</sup></b>	\$369	\$363

<sup>1</sup> Prior to July 2019, unemployment and sickness benefit payments were based on net amounts. Beginning in July 2019, that data is no longer available. Benefit payments now reflect gross amounts.

<sup>2</sup> In accordance with the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, amounts reflect a reduction of 6.6% under sequestration for days of unemployment and sickness after September 30, 2017, 6.2% for days after September 30, 2018, and 5.9% for days after September 30, 2019.

-- Note: Beginning in May 2020, RUIA claimants have also been paid under the Coronavirus Aid, Relief, and Economic Security Act of 2020. In June 2020, the gross amount paid is \$49.1 million.