

# INTRODUCTION

Fiscal year 2022 saw the U.S. Railroad Retirement Board pay over \$13 billion in benefit payments across the retirement/survivor and unemployment/sickness programs. The total is \$111 million greater than in fiscal year 2021, representing a \$285 million increase in retirement/survivor benefits and a \$174 million decrease in unemployment/sickness benefits, due to pandemic-related relief benefits beginning to end. In descending order, Texas, Illinois, Florida, Pennsylvania, California, New York, Ohio, Missouri, Nebraska, Georgia, and Virginia accounted for slightly over 50% of the total retirement and survivor benefits, as was the case in fiscal year 2021. Most of the unemployment and sickness benefits were paid, in descending order: Illinois, Texas, California, Pennsylvania, Nebraska, Indiana, New York, Ohio, New Jersey, and Georgia. For more information, see Statistical Table A6.

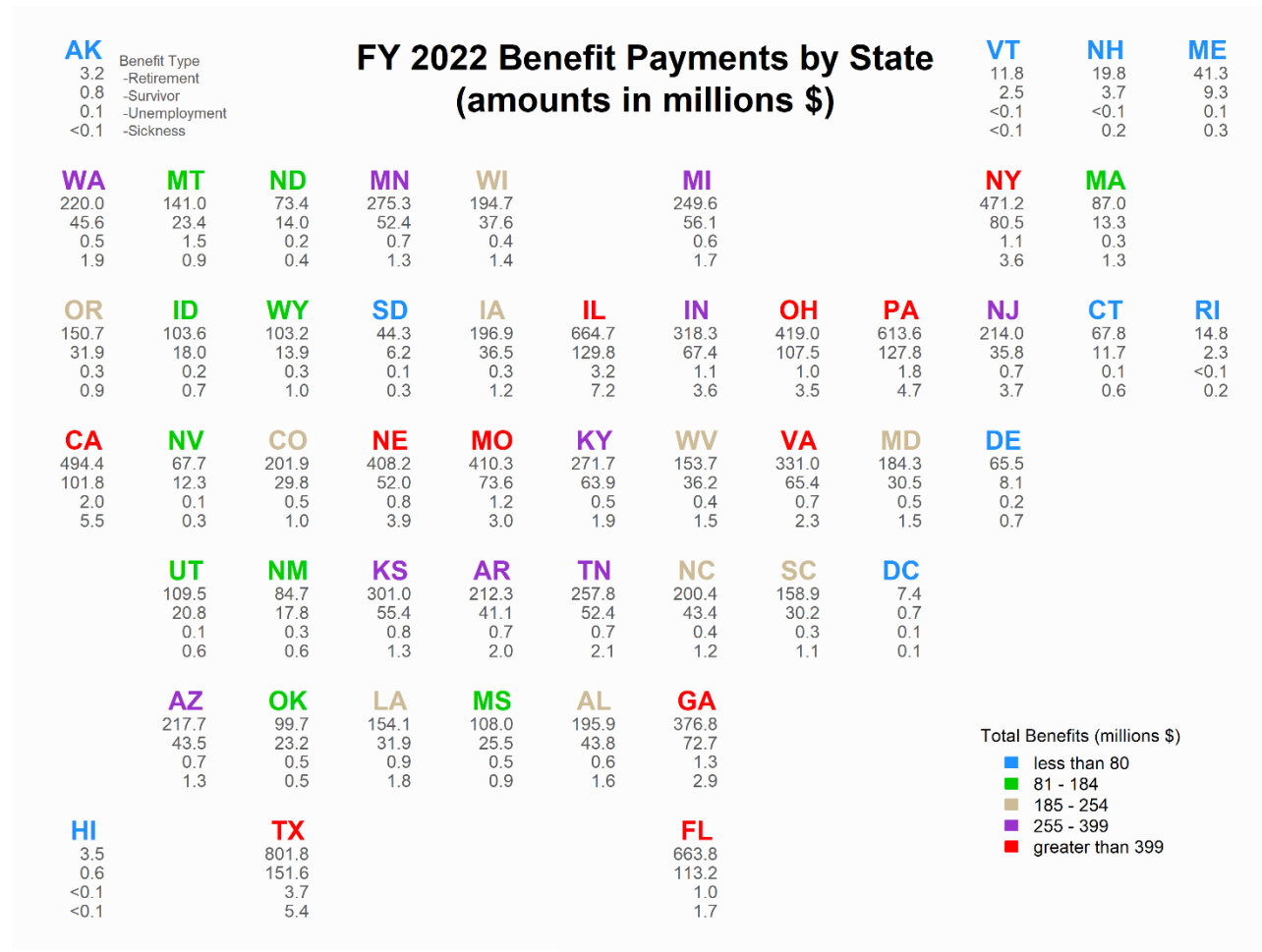


Figure 1. FY 2022 Benefit Payments by State

Awarded retirement annuities were near all-time lows over the twenty-year period from 2003 through 2022 across all categories with the exception of divorced widows which saw a sharp increase from 2020 to 2021 and remained high in 2022 (Figures 2 and 3). Although most award category trends have declined, some including aged widows, children, divorced widows, and widowed parents have seen increases in recent years. Employee, spouse, and aged widows are typically the most frequently awarded annuitant types. For more information, see Statistical Table B2.

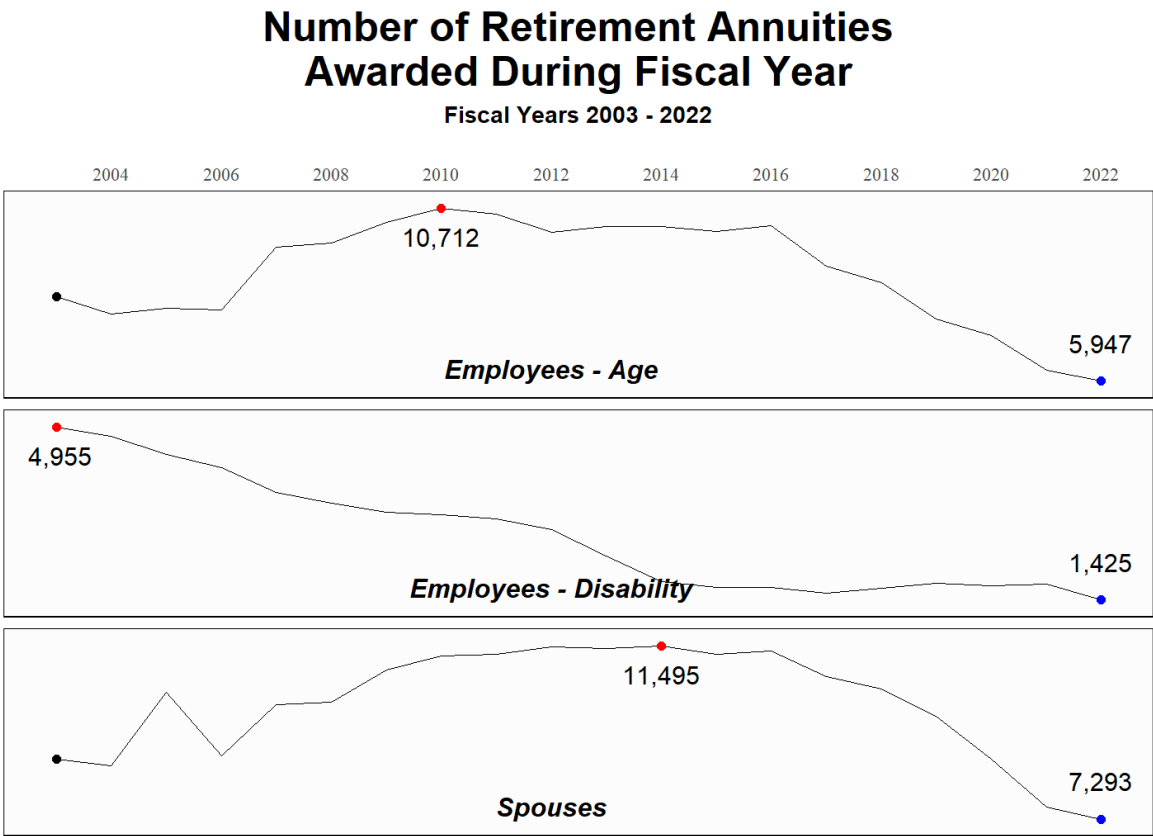


Figure 2. Number of Retirement Annuities Awarded During Fiscal Years 2003 through 2022

# Number of Survivor Annuities Awarded During Fiscal Year

Fiscal Years 2003 - 2022

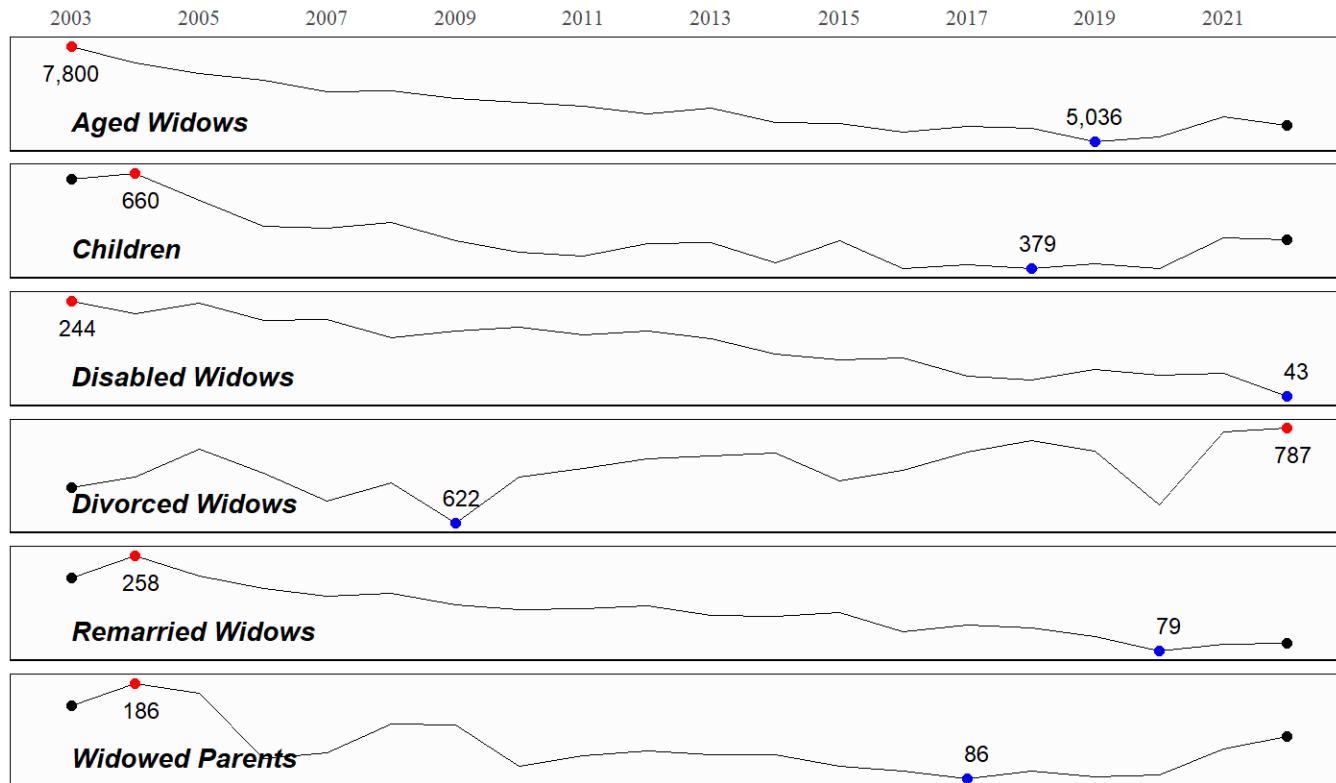


Figure 3. Number of Survivor Annuities Awarded During Fiscal Years 2003 through 2022

While unemployment and sickness benefit totals in Figure 1 provide insight into the distribution of those benefit amounts across the United States, usage rates show the extent of unemployment and sickness claims across the country. The usage rate for both unemployment and sickness insurance is the number of railroad employees who applied for and received benefits within a state compared to the total number of eligible employees within the state. Unemployment insurance usage rates for benefit year 2021 (July 2021 – June 2022) were higher primarily in states in the south-central part of the country (Figure 4). For more information, see Statistical Tables C3 and C4.

### Unemployment Usage Rates for Benefit Year 2021

July 2021 - June 2022

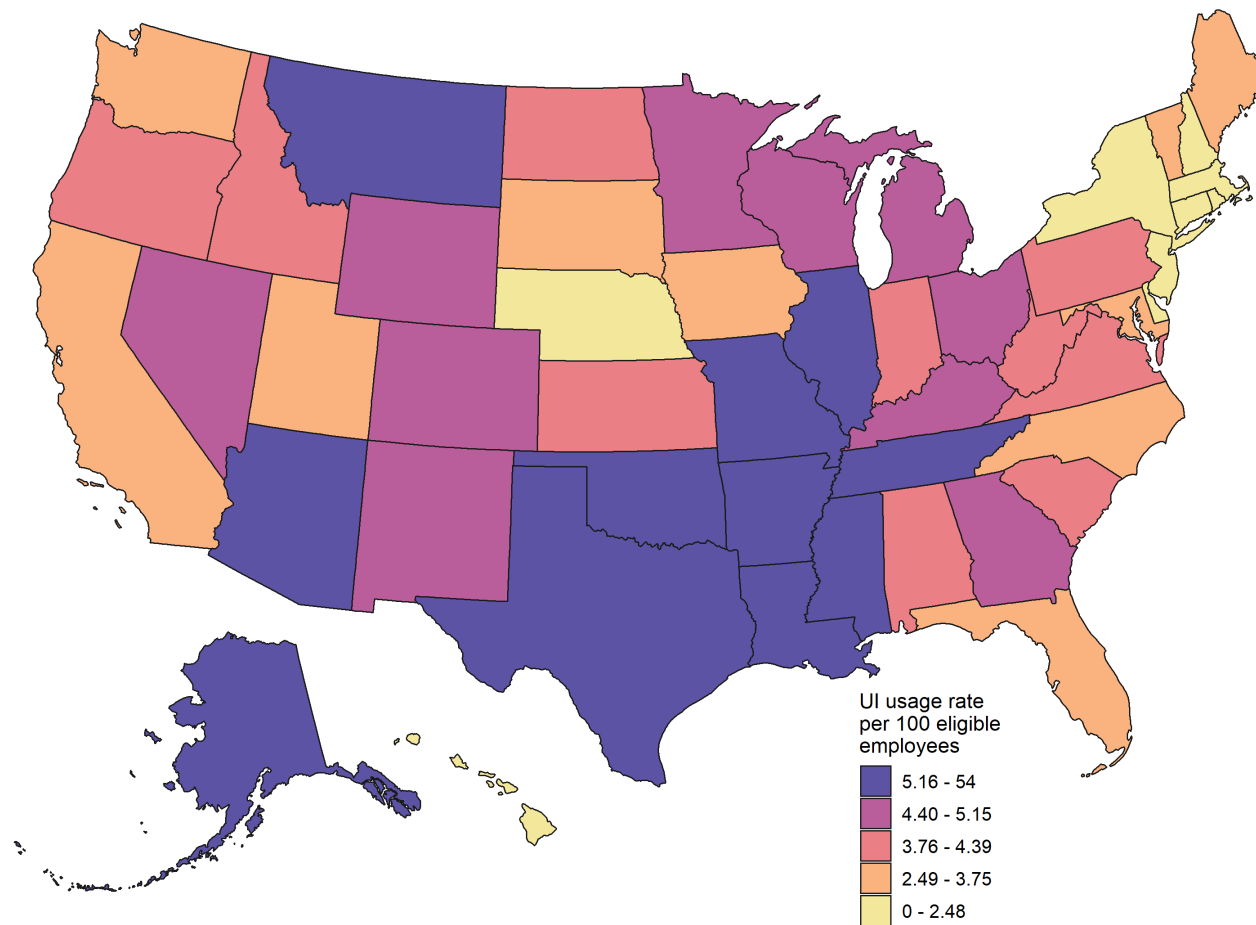


Figure 4. Unemployment Usage Rates for Benefit Year 2021 (July 2021 - June 2022)

The eastern half of the United States experienced the highest sickness insurance usage rates during benefit year 2021 with Midwest and Southern States dominating (Figure 5). Although COVID-19 associated applications continued to exceed more traditional illnesses such as injuries and musculoskeletal issues, the extent to which it dominated decreased noticeably from the preceding benefit year. Continuing sickness claims were not affected as much by the virus due to its shorter duration when compared to more chronic illnesses. For more information, see Statistical Tables C3 and C4.

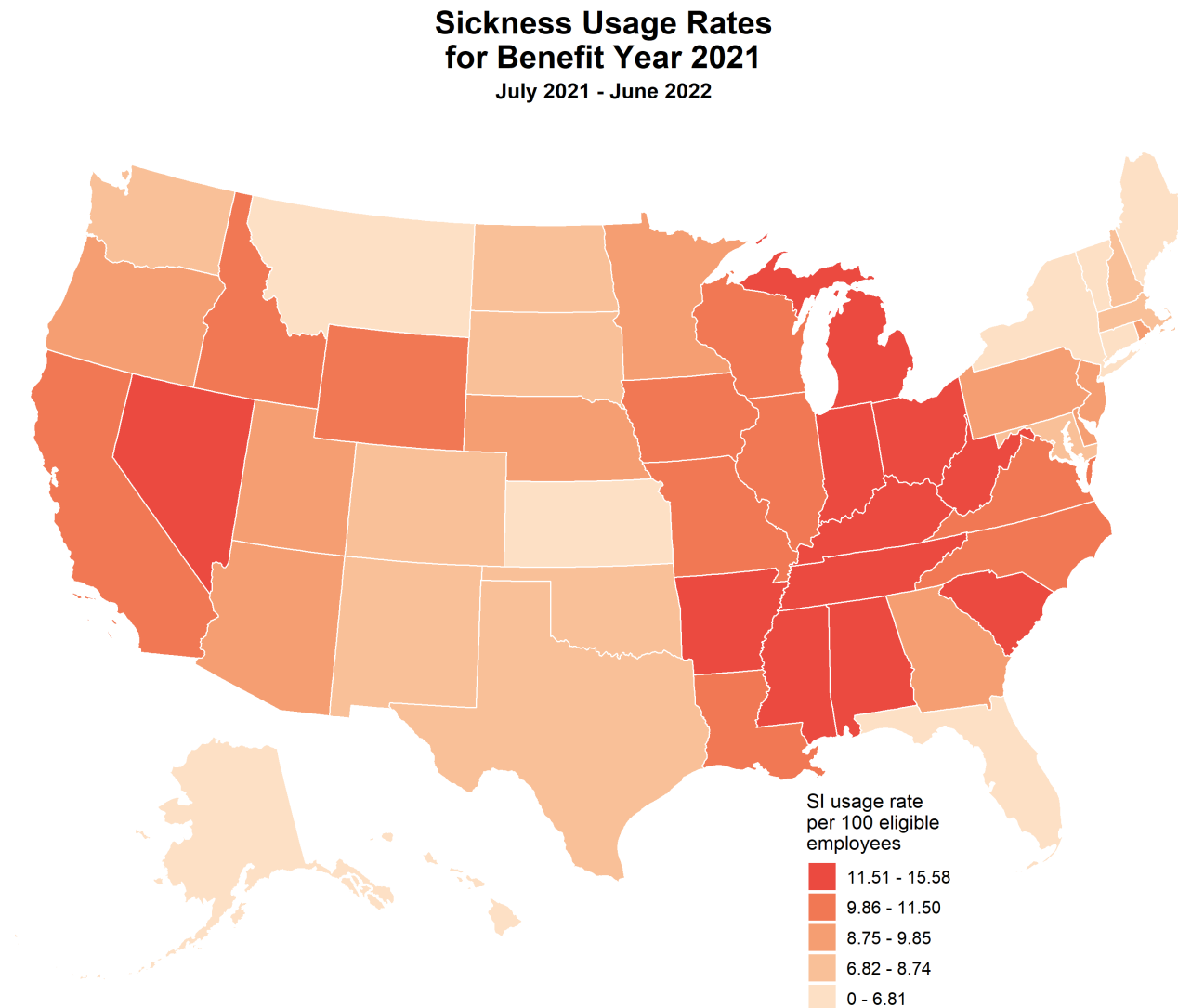
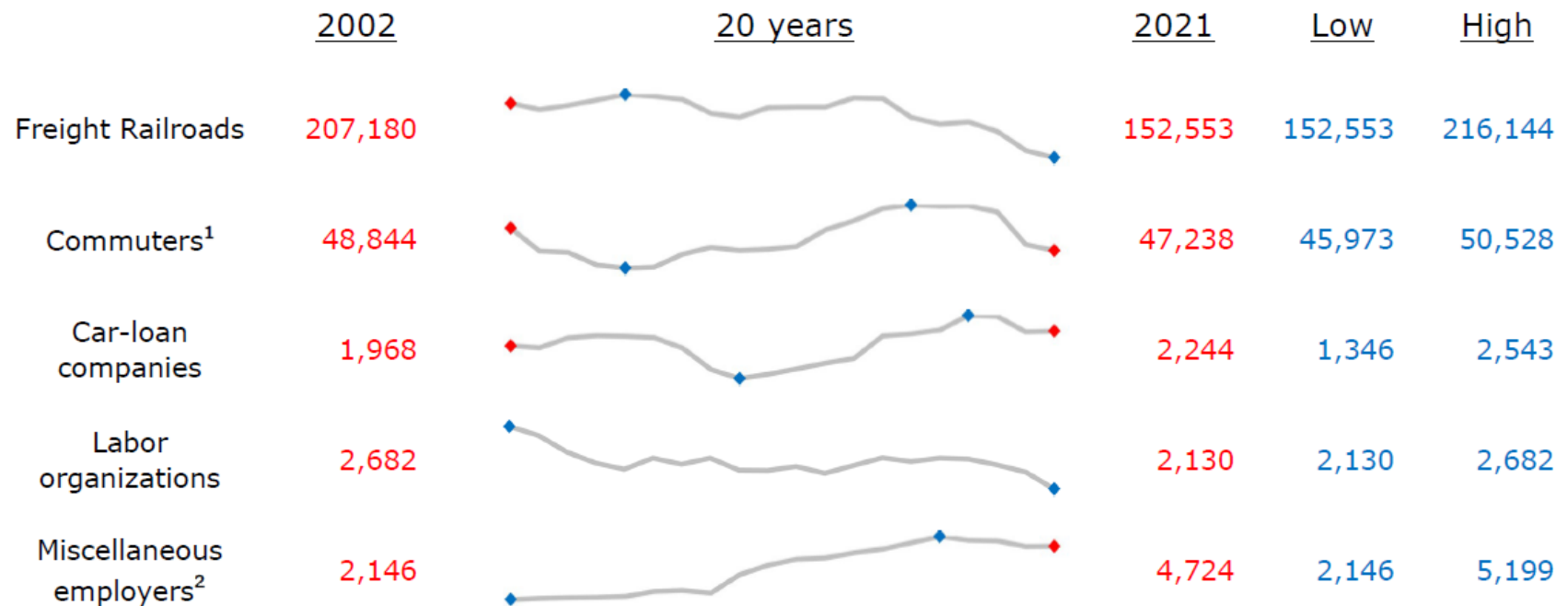


Figure 5. Sickness Usage Rates for Benefit Year 2021 (July 2021 - June 2022)

Railroad employment trends varied by employer type from calendar years 2002 through 2021 (Figure 6). Freight railroads experienced the largest decline of 26% while labor organizations and commuters had smaller declines of 21% and 3%, respectively. Car loan companies increased by 14% and miscellaneous employers increased by 120%. Freight railroads are traditionally the predominant employer in the rail industry, comprising 73% of total employees in 2021, down slightly from nearly 79% back in 2002. For more information, see Statistical Table D5.

### Railroad Employees by Employer Type for years 2002 - 2021



<sup>1</sup> Includes National Railroad Passenger Corp. (Amtrak)

<sup>2</sup> Includes lessor companies, employer associations and miscellaneous carrier affiliates.

Figure 6. Railroad Employees by Employer Type (2002-2021)

The tables in this volume include data on the railroad retirement and railroad unemployment insurance programs for fiscal year 2022 (October 2021-September 2022), calendar year 2021, unemployment and sickness benefit year 2021-2022 (July 2021-June 2022), and, in some tables, for earlier years.

The tables are presented in four sections: (A) financial statistics, (B) retirement and survivor benefits, (C) unemployment and sickness benefits, and (D) employment and compensation. Each section is introduced by a summary of the subject matter, including definitions of the major terms used in the tables and limitations of the data presented in the tables.

All the Statistical Tables are now available online. For current and historical versions, go to:

<https://www.rrb.gov/FinancialReporting/FinancialActuarialStatistical/Annual>

## FINANCIAL STATISTICS

- A1. Beneficiaries and benefits paid under the Railroad Retirement Act and the Railroad Unemployment Insurance Act, by fiscal year, 2013-2022, cash basis
- A2. Status of the Railroad Retirement Act accounts and trust funds, by fiscal year, 2013-2022, cash basis
- A3. Status of the financial interchange between the Railroad Retirement Accounts and the Old-Age and Survivors, Disability, and Hospital Insurance Trust Funds, by fiscal year, 2013-2022, cash basis
- A4. Status of the Railroad Unemployment Insurance Account, by fiscal year, cash basis\*
- A5. Status of the RUIA Administration Fund, by fiscal year, cash basis\*
- A6. Retirement, survivor, unemployment and sickness benefit payments, by class of benefit and state of residence of beneficiary, fiscal year 2022, cash basis

## RETIREMENT AND SURVIVOR BENEFITS

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- B3. Retirement and survivor benefits paid, by type of benefit and fiscal year, 2013-2022, cash basis
- B4. Lump-sum death benefits and residual payments awarded, by status of employee at death and fiscal year, 2013-2022
- B5. Number and average amount of retirement and survivor annuities in current-payment status on September 30, 2022, by type of annuity and status of annuitant under Social Security Act
- B6. Regular employee annuities in current-payment status on September 30, 2022, and awarded in fiscal year 2022, by type and amount
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\*This table is no longer available as of Fiscal Year 2019.



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- B22. Components of survivor annuities in current-payment status on December 31, 2021, and awarded in calendar year 2021, by type of beneficiary and amount
- B23. Survivor annuities in current-payment status on September 30, 2022, and awarded in fiscal year 2022, by type of beneficiary and component
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- B25. Survivor family benefits in current-payment status on December 31, 2021, by family composition and amount
- B26. Lump-sum death benefits and residual payments awarded in fiscal year 2022, by status of employee at death and amount
- B27. Retirement and survivor benefits in current-payment status on September 30, 2022, by class and state (Figure B27 -- Number of RR Act Beneficiaries in Current-Payment Status by State on September 30, 2022)

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- C2. Unemployment and sickness beneficiaries, benefit averages, and related data, by benefit year, 1992-1993 through 2021-2022
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