

Welcome!

Consumer Expenditure Surveys (CE) Methods Symposium



**Technical Help:
Use the chat box
OR email**

CE_WORKSHOP_HELP@bls.gov



Agenda

1:00-2:00 p.m. Session I

Welcome and CE Redesign Update - *Laura Erhard*

Navigating a Pandemic: Adjusting CE Field Data Collection During COVID-19 - *John Gloster and Alicia Walker, U.S. Census Bureau*

An Examination of Nonresponse Bias in the Consumer Expenditure Surveys During the COVID-19 Period - *Stephen Ash, Division of Price Statistical Methods*

2:00-2:15 p.m. Break

2:15-3:15 p.m. Session II

COVID-19's Effect on the Consumer Expenditure Surveys' Estimates - *Bryan Rigg and Brett Creech*

COVID-19 Protocol Changes and Consumer Expenditure Diary Reporting in 2020 - *Brett McBride and Nikki Graf, Ph.D.*

Consumer Expenditure Interview Survey: Data Quality Assessment Pre vs. Post COVID-19 - *David Biagas, Ph.D., Office of Survey Methods Research*



Consumer Expenditure Survey: Redesign Update

Laura Erhard
Survey Methods Symposium
July 20, 2021



Outline

- Brief overview of CE and the Gemini Redesign project
- Results from the online diary test
- Updates on the Streamlined Questionnaire
- Future research



Current CE Design



- 4 waves of personal interviews
- 3 month recall
- Large or recurring expenditures

- 2 one-week household paper* diaries
- Contemporaneous recall
- Small, frequently purchased items



**Consumer Expenditure Survey
Estimates**

Gemini Redesign Plan



Design Elements for Implementation

- Online diary
- Streamlined interview (less detailed expenditure categories)
- Record use
- Select incentives



Design Elements being Postponed

- Single sample design
- Two visits per wave
- Two waves, a year apart



Online Diaries



Online Diary: Large Scale Feasibility Test (LSF)

- Sample size: 2500 addresses
- Field period: October 2019-April 2020
- Pre-notification postcard sent out in advance of the advance letter
- Advance letter with \$5 cash incentive by priority mail for half the sample (incentive experiment)
- Two interviewer visits to household, one for diary placement and one for pickup
- Push to online diary if the household respondent is eligible based on screening questions, if they refuse or are ineligible-- they get paper diaries
- Automated email reminders and two calls by interviewer during the diary keeping period to remind respondents to login and enter expenses
- Recall tab in the CAPI instrument for interviewer to record additional expenses reported by respondent at pickup



Highlights from the analysis



Summary of LSF results

- Final LSF response rate was 41.8%, which is lower than the production diary (46.0%)
 - ▶ Potential test effect “Diaries placed too late” (+3.1%)
 - ▶ LSF data had a higher proportion of cases removed due to editing (+2.1%)
- About 37% of the completed diaries were online, the rest were paper
 - ▶ Online respondents were younger, higher education, homeowners, larger households
- Incentive and advance postcards had no impact on response rate
- Mean total expenditure reported was lower than production diary, driven by differences in the “Other” category of expenditures
- Higher and allocation of expenses in LSF compared to the production diary.

Recommendations from preliminary analysis

- FRs need more training on the online diary; placement and pickup procedures need to be clarified
- Allow for an explicit option for paper placement for online eligibles in the instrument Access and training for online diary help desk.
- Recall: discuss with Census to find the best way to pick up recall with online diaries
- A printed user guide needed with a flap to gather receipts
- Customizing the username and password may not be needed
- Develop better screening for online diary



Online Diary next steps

- Continued evaluation of differences between production and LSF
- Evaluate the results from the contingency use of the online diary in production
- Recommendations for full implementation protocols
- Implementation in July 2022
- Continuous improvement
 - ▶ autosuggest feature, prompts, trip based diary
 - ▶ more use of receipts
 - ▶ self-administration test



Streamlined Questionnaire



Streamlined questionnaire features

- Reduce the level of detail: aggregate to the extent possible
- Records focus: facilitate the use of records, including a records path for certain groups of questions and records incentives
- Question order/sections: some changes to the order and section organization



CEQ: Streamlined Questionnaire

- The streamlined CAPI instrument with a record-focus will not be field tested, but will go through cognitive testing and expert review before being put into production in a phased implementation starting in 2023, in conjunction with the development of the revised processing system.
- Major sections with few or no changes will be released in the first phase in 2023 along with the revised processing system for those sections. Requirements for these sections are ready. Sections with more extensive changes will be released in subsequent years.

Streamlined Questionnaire Sections

- Demographics (no changes)
- Housing characteristics
- Rented housing
- Owned homes - records path
- Utilities and Fuels - records path, records emphasis
- Household services
- Home improvement and repairs
- Household furnishings and equipment
- Vehicles - records path
- Transportation
- Computers and Electronics
- Hobbies, Sports, and Recreation
- Family care and education
- Clothing, jewelry and watches
- Health Insurance - records emphasis
- Medical Services and Equipment - records emphasis
- Other Insurance - records emphasis
- Professional services
- Trips
- Events
- Contributions
- Expense patterns for selected goods and services
- Extended Recall for outlet data collection
- Work Experience and Income (no changes)
- Assets and Liabilities (no changes)

Streamlined Questionnaire Sections

- Demographics (no changes)
- Housing characteristics
- Rented housing
- Owned homes - records path
- Utilities and Fuels - records path, records emphasis
- Household services
- Home improvement and repairs
- Household furnishings and equipment
- Vehicles - records path
- Transportation  April 2023
- Computers and Electronics
- Hobbies, Sports, and Recreation
- Family care and education  April 2023
- Clothing, jewelry and watches
- Health Insurance - records emphasis
- Medical Services and Equipment - records emphasis
- Other Insurance - records emphasis
- Professional services
- Trips
- Events
- Contributions
- Expense patterns for selected goods and services  April 2023
- Extended Recall for outlet data collection
- Work Experience and Income (no changes)
- Assets and Liabilities (no changes)

Streamlined Questionnaire Sections

- Demographics (no changes)
- Housing characteristics
- Rented housing
- Owned homes - records path  In progress
- Utilities and Fuels - records path, records emphasis  In progress
- Household services  In progress
- Home improvement and repairs  In progress
- Household furnishings and equipment
- Vehicles - records path  In progress
- Transportation  April 2023
- Computers and Electronics
- Hobbies, Sports, and Recreation
- Family care and education  April 2023
- Clothing, jewelry and watches
- Health Insurance - records emphasis
- Medical Services and Equipment - records emphasis  In progress
- Other Insurance - records emphasis
- Professional services
- Trips
- Events
- Contributions
- Expense patterns for selected goods and services  April 2023
- Extended Recall for outlet data collection
- Work Experience and Income (no changes)
- Assets and Liabilities (no changes)

Upcoming Changes to Interview Survey

2021:

- We have reduced content including replacing detailed clothing questions with fewer high level questions about spending on clothes.

2023: Three sections have major changes

- A new Family Care and Education section will include questions on childcare, education, school meals, and adult care
- The section on Expense Patterns will include questions on grocery expenses, alcohol and tobacco, food away from home and gifts
- The section on Transportation will include questions on vehicle operating expenses and public transportation

Consumer Expenditure Surveys

CE

BROWSE CE

- CE HOME
- CE METHODS
- CE NEWS RELEASES
- CE PUBLICATIONS
- CE TABLES
- CE LABSTAT DATABASE
- CE PUBLIC USE MICRODATA
- CE WORKSHOP AND SYMPOSIUM
- CE GEOGRAPHIC DATA
- CE RESEARCH PRODUCTS
- CE EVENTS IN YOUR AREA
- CONTACT CE

Gemini Project to Redesign the Consumer Expenditure Surveys

The Gemini Project was launched to research and develop a redesign of the Consumer Expenditure (CE) surveys, addressing issues of measurement error and respondent burden. In July 2013, a [redesign proposal](#) was approved, outlining the future direction of the CE survey. More information on the history of the Gemini Project is available on this page under Gemini Background. Documents related to the Gemini project can be found at the [CE library](#) by filtering on the "Gemini" column.

Quick Links

- » [Latest News on the Redesign](#)
- » [Overview of Redesign](#)
- » [Gemini Background](#)
- » [Gemini Field Tests](#)
- » [Feedback](#)

Latest Updates on the Redesign

- » The annual free **CE sponsored Survey Methods Symposium** will be held on July 20, 2021 and will feature presentations from CE

<https://www.bls.gov/cex/geminiproject.htm>



Contact Information

Laura Erhard

Chief, Research and Program Development
Division of Consumer Expenditure Surveys

202-691-5119

Erhard.Laura@bls.gov