

# Consumer Expenditure Survey Gemini Project

## Current and upcoming research

Tuesday, April 05, 2016

This research agenda reflects Gemini redesign-related projects that are currently in progress or in the planning stages. Some projects in the Gemini High Level timeline are not at a stage of planning to be included in the detailed research agenda (e.g., the redesign dress rehearsal). Those projects will be added as more details are learned.

| <b>2013</b>  | <b>Start<br/>Year</b> | <b>End<br/>Year</b> |
|--|-----------------------|---------------------|
| 1. CE Redesign Proof-of-Concept Test                                 | 2013                  | 2016                |
| <b>2014</b>  | <b>Start<br/>Year</b> | <b>End<br/>Year</b> |
| 1. Data Quality Profile Prototype and Initial Requirements           | 2014                  | 2016                |
| <b>2015</b>  | <b>Start<br/>Year</b> | <b>End<br/>Year</b> |
| 1. Electronic Desktop Diary Design Improvements                      | 2015                  | 2016                |
| 2. Gemini Incentives Field Test                                      | 2015                  | 2017                |
| <b>2016</b>  | <b>Start<br/>Year</b> | <b>End<br/>Year</b> |
| 1. Data Quality Profile Implementation                               | 2016                  | 2017                |
| 2. Gemini Records and Recall Interview Development BPA               | 2016                  | 2017                |
| 3. Gemini Records and Recall Interview Global Questions Testing Team | 2016                  | 2016                |
| 4. Gemini Records Interview Online Records Handling                  | 2016                  | 2017                |
| 5. Literature Review of Mode Effects Analysis Methods                | 2016                  | 2016                |
| 6. Records Checklist Content Study                                   | 2016                  | 2016                |
| 7. Time and Motion Study Analysis                                    | 2016                  | 2016                |
| 8. Web Diary Implementation Testing BPA                              | 2016                  | 2017                |

**2017**

**Start   End  
Year   Year**

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1. Gemini Large-Scale Feasibility Test

2017 2019

# Project Descriptions

## *In-Progress*

### **CE Redesign Proof-of-Concept Test**

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The purpose of this project is to test whether the proposed Gemini redesign, specifically, a single-sample expenditure survey design consisting of 2 personal interviews and individual diaries, is feasible.

The results of the test will be used to decide whether the redesign structure is feasible, in order to make the decision to further research on the proposed design. The results will also be used to inform future development of each of the components.

### **Data Quality Profile Prototype and Initial Requirements**

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The purpose of this project is to develop a prototype data quality profile and initial requirements for producing an annual Data Quality Profile for internal staff and external data users. The Data Quality Profile will incorporate metrics developed by the measurement error study.

The findings from this project will be used to identify and describe the elements needed to produce an annual Data Quality Profile and a data quality prototype that can be built upon as more data quality indicators are defined.

### **Electronic Desktop Diary Design Improvements**

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The purpose of this project is to develop alternative design elements for the web and mobile diaries, with emphasis on the desktop design.

The results from this project will be used as an input to finalizing the web and mobile diary design for the Large Scale Feasibility Test.

### **Gemini Incentives Field Test**

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The purpose of this project is to test and assess alternative incentive structures and amounts for the survey redesign.

The results from this project will be used to either validate the existing proposed incentive structure for the Large Scale Feasibility Test, or to recommend an alternative.

## **Records Checklist Content Study**

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The purpose of this project is to develop and test several Records Checklists and recommend which design is most effective at encouraging respondents to collect records in advance of the interview visit.

The findings from this project will be used to inform the design of the Records Checklist to be used in the Large Scale Feasibility Test.

## **Gemini Records Interview Online Records Handling**

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The purpose of this project is to research and recommend technologically feasible approaches to extracting or transferring electronically-stored expenditure information from respondents to Census data collection databases.

The findings from this project will be used to develop an electronic records handling protocol, improving the Records Interview by increasing data quality and reducing respondent burden.

## *Scheduled*

## **Gemini Records and Recall Interview Global Questions Testing Team**

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The purpose of this project is to cognitively test global questions for the recall and records interview expenditure categories that have been recommended to be asked as an aggregated single question. The project will address any unresolved issues and outstanding testing items stemming from questionnaire development work, including items specified by Westat researchers as needing more testing. Researchers will employ cognitive interviewing techniques to measure respondent burden, provide evidence about the measurement error properties of global questions, and make recommendations for the final Recall and Records interviews of the redesigned CE survey.

The findings from this project will be used to validate that respondents consider all relevant subcategories when being asked a global question for a given expenditure category, or to recommend further disaggregation.

## **Literature Review of Mode Effects Analysis Methods**

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The purpose of this project is to acquire familiarity with current methods of analyzing mode effects.

With the proposed offer of mode choices to respondents under the Gemini Redesign of the CE, familiarity with current methods of mode choice analyses would be a step towards preparing CE to conduct mode effects analyses from the field testing of the redesigned survey.

## **Time and Motion Study Analysis**

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The purpose of this study is to investigate the time interviewers spend on different components of the CE survey (interview and diary), particularly time outside of that already tracked by the CAPI instrument.

The findings from this project will be used to confirm assumptions about time required for various aspects of both the production and redesigned survey, and to identify possible administrative improvements.

## **Data Quality Profile Implementation**

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The purpose of this project is to implement the Data Quality Profile project recommendations into production. This project will yield a Data Quality Profile published annually for external users, as well as an internal Data Quality dashboard for use by internal stakeholders.

## **Gemini Records and Recall Interview Development BPA**

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The purpose of this project is to contract with Westat to test aggregation levels and question wording for the Recall and Records interviews of the redesigned CE survey, based on the updated CE data requirements and previous BLS work products (e.g., Gemini Content Team report). This project builds on previous questionnaire development work completed by Westat.

The findings from this project will be used to finalize the Recall and Records interviews of the redesigned CE survey.

## **Web Diary Implementation Testing BPA**

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The purpose of this project is to contract with Westat to test CE's electronic diary under predetermined protocol conditions in advance of a potential phased (e.g., less than 10 percent), screened, and optionally-offered implementation alongside the redesigned paper diary in the 2018 production survey.

CE will base its 2018 production survey implementation decision on the test results.

## **Gemini Large-Scale Feasibility Test**

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The purpose of this project is to test the design that will closely reflect all of the components of Gemini redesign; incorporating lessons learned from the web and individual diaries test, the proof-of concept test, and cognitive lab studies and additional research.

Findings from this test will be used in planning the dress rehearsal prior to full implementation of the redesign.