2015 Changes

INTERVIEW SURVEY AND DIARY SURVEY
CONSUMER EXPENDITURE
PUBLIC USE MICRODATA

August 30, 2016

U.S. Department of Labor
Bureau of Labor Statistics
Division of Consumer Expenditure Survey

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Changes in the 2015 Microdata Files from the 2014 Files

This document summarizes the changes in the 2015 files from the 2014 files for the Interview Survey and Diary Survey. Generally, there are three types of variable changes: Additions, deletions, and changes.

I. Sample Redesign

In 2015, Census introduced a new sample frame that is based on the 2010 Population Census. As a result, users cannot link all consumer units whose participation spanned the introduction of the new sample. For any micro-level longitudinal analysis, users may use the 2013 and 2014 data or the 2015 data. Data for the first quarter for 2015 are twice in PUMD, once in the 2000 sample frame and once in the 2010 sample frame. The 2014 data set uses the 2000 frame for the first quarter in 2015 (q151) and the 2015 data set uses the 2010 frame for first quarter in 2015 (q151). However, the two data file differ.

Due to the sample redesign, the first quarter of the 2015 data set does not contain data for January (q151). This omission affects some aggregate estimates of quarterly and annual time periods. To roughly estimate the missing January in those, inflate estimates of the first quarter by factors of 3/2 (q151) and estimates of 2015 by 12/11. Estimate of averages are not severely affected because the numerator and the denominator are both similarly affected. Calendar period estimates are not affected because all expenditures from January interviews fall into the q144 time period.

II.   Bounding Interview Removal

Before 2015, the Interview Survey included a preliminary bounding interview, and each CU could be contacted up to five times over five quarters. The bounding interview recorded recent major expenditures for comparison with subsequent purchases. With the collection of 2015 data, CE cut the bounding interview to reduce respondent burden and save money.

Data in the 2015 PUMD package will contain CU's from both the old sample and the new. The DESFLG variable identifies which sample CE used to interview a CU and which stage in the interview process the data reflect. CU's from the 2000 sample will continue with interview designations (INTERI) of 2-5, while CU's from the 2010 sample will be stored using the interview designations of 1-4.

III.   Variable Changes

Interview Survey

A. Variable Deletions in FMLI file

Beginning in 2015Q1 the following variables will be deleted from the FMLI files. In the 2015 data, CE deleted variables that were related to calculating the poverty threshold.

Variable	Description	Flag	Type
FAMTFEDX	Amount of Federal income tax deducted from last pay annualized for all CU members (sum ANFEDTX from MEMB file for all CU members) BLS derived	FAMT_EDX	NUM(8)
FEDRFNDX	During the past 12 months, what was the total amount of refund received from Federal income tax by ALL CU members? CAPI Section 22	FEDR_NDX	NUM(8)
FEDTAXX	During the past 12 months, what was the total amount PAID for Federal income tax, in addition to that withheld from earnings, by ALL CU members? CAPI Section 22	FEDTAXX_	NUM(8)
FINCATAX	Amount of CU income after taxes in the past 12 months (FINCBTAX – TOTTXPDX) *L BLS derived	FINCAT_X	NUM(9)
FSLTAXX	Amount of state and local income taxes deducted from last pay annualized for all CU members (sum ANSLTX from MEMB file for all CU members) BLS derived	FSLTAXX_	NUM(8)
SLOCTAXX	During the past 12 months, what was the total amount PAID for state and local income taxes, in addition to that withheld from earnings, by ALL CU members? CAPI Section 22	SLOC_AXX	NUM(8)

SLRFUNDX	During the past 12 months, what was the total amount of refund received from state and local income tax by ALL CU members? CAPI Section 22	SLRF_NDX	NUM(8)
TOTTXPDX	Amount of personal taxes paid by CU in past 12 months (FAMTFEDX, FSLTAXX, FEDTAXX, SLOCTAXX, MISCTAXX, - (0, FEDRFNDX, SLRFUNDX)) *L BLS derived	TOTT_PDX	NUM(9)
FAMTFEDM	Amount of Federal income tax deducted from last pay annualized for all CU members (sum ANFEDTXM from MEMB file for all CU members) BLS derived	FAMT_EDM	NUM(9.1)
FAMTFED1	Imputation Iteration #1 - FAMTFEDX		NUM(8)
FAMTFED2	Imputation Iteration #2 - FAMTFEDX		NUM(8)
FAMTFED3	Imputation Iteration #3 - FAMTFEDX		NUM(8)
FAMTFED4	Imputation Iteration #4 - FAMTFEDX		NUM(8)
FAMTFED5	Imputation Iteration #5 - FAMTFEDX		NUM(8)
FINCATXM	Amount of CU income after taxes in past 12 months (FINCBTXM – TOTTXPDM) *L BLS derived	FINCA_XM	NUM(11.1)
FINCATX1	Imputation Iteration #1 - (FINCBTX1-TOTTXPD1)		NUM(9)
FINCATX2	Imputation Iteration #2 - (FINCBTX1-TOTTXPD1)		NUM(9)
FINCATX3	Imputation Iteration #3 - (FINCBTX1-TOTTXPD1)		NUM(9)
FINCATX4	Imputation Iteration #4 - (FINCBTX1-TOTTXPD1)		NUM(9)
FINCATX5	Imputation Iteration #5 - (FINCBTX1-TOTTXPD1)		NUM(9)
FSLTAXXM	Amount of state and local income taxes deducted from last pay annualized for all CU members (sum ANSLTXM from MEMB file for all CU members) BLS derived	FSLT_XXM	NUM(10.1)
FSLTAXX1	Imputation Iteration #1 - FSLTAXX		NUM(8)
FSLTAXX2	Imputation Iteration #2 - FSLTAXX		NUM(8)
FSLTAXX3	Imputation Iteration #3 - FSLTAXX		NUM(8)
FSLTAXX4	Imputation Iteration #4 - FSLTAXX		NUM(8)
FSLTAXX5	Imputation Iteration #5 - FSLTAXX		NUM(8)
TOTTXPDM	Amount of personal taxes paid by CU in past 12 months (FAMTFEDM, FSLTAXXM, FEDTAXX, SLOCTAXX, MISCTAXX -(FEDRFNDX, SLRFUNDX)) *L BLS derived	TOTT_PDM	NUM(11.1)
TOTTXPD1	Imputation Iteration #1 -		NUM(9)

Variable	Description	Flag	Type
	(FAMTFED2, FSLTAXX2, FEDTAXX, SLOCTAXX, MISCTAXX, - (FEDRFNDX, SLRFUNDX))		
TOTTXPD2	Imputation Iteration #2 - (FAMTFED2, FSLTAXX2, FEDTAXX, SLOCTAXX, MISCTAXX, - (FEDRFNDX, SLRFUNDX))		NUM(9)
TOTTXPD3	Imputation Iteration #3 - (FAMTFED2, FSLTAXX2, FEDTAXX, SLOCTAXX, MISCTAXX, - (FEDRFNDX, SLRFUNDX))		NUM(9)
TOTTXPD4	Imputation Iteration #4 - (FAMTFED2, FSLTAXX2, FEDTAXX, SLOCTAXX, MISCTAXX, - (FEDRFNDX, SLRFUNDX))		NUM(9)
TOTTXPD5	Imputation Iteration #5 - (FAMTFED2, FSLTAXX2, FEDTAXX, SLOCTAXX, MISCTAXX, - (FEDRFNDX, SLRFUNDX))		NUM(9)

B. Variable Deletions in MEMI file

Beginning in 2015Q1 the following variables will be deleted to the MEMI files.

Variable	Description	Flag	Type
AMTFED	How much was deducted from the member's last pay for Federal income tax? CAPI Section 22	AMTFED_	NUM(8)
SLTAXX	How much was deducted from the member's last pay for state and local income tax? CAPI Section 22	SLTAXX_	NUM(8)
ANFEDTX	Annualized amount of Federal income tax deducted from last pay ([AMTFED/GROSPAYX] x SALARYXM)	ANFEDTX_	NUM(8)
ANFEDTXM	Annualized amount of Federal income tax deducted from last pay ([AMTFED/GROSPAYX] x SALARYXM)	ANFE_TXM	NUM(8)
ANSLTX	Annualized amount of state and local income taxes deducted from last pay ([SLTAXX/GROSPAYX] x SALARYXM)	ANSLTX_	NUM(8)
ANSLTXM	Annualized amount of state and local income taxes deducted from last pay ([SLTAXX/GROSPAYX] x SALARYXM)	ANSLTXM_	NUM(8)

C. Variable Deletions in IHC file

Beginning in 2015Q1 the following variable will be deleted to the IHC files.

Variable	Description	Flag	Type
OTHPLAN	Are you (or any members of CU) covered by any plan other than Medicare or Medicaid which provides free health care such as CHAMPUS, military health care, or TRI-CARE? CODED 1 Yes 2 No CAPI Section 14	OTHPLAN_	CHAR(1)

D. Variable Deletions in TRE file
Beginning in 2015Q1 the following variable will be deleted to the TRE files.

Variable	Description	Flag	Type
NUMNONCU	Since the 1st of (month, three months ago), how many trips have you (has your CU) paid in full or in part for any non-CU members? CAPI Section 18	NUMN_NCU	CHAR(1)

E. Variable Additions in FMLI file
Beginning in 2015Q1 the following variables will be added to the FMLI files.

Variable	Description	Flag	Type
BUSCREEN	Since the first of REF_MONTH, have YOU_ANYMEM had any expenses that will be reimbursed or deducted as business expenses? 1. Yes 2. No	BUSC_EEN	CHAR(1)
INT_HOME	Does this home have high-speed internet access, such as DSL, cable broadband, or FiOS? Does not include dial-up. 1. Yes 2. No		CHAR(1)
INT_PHON	Do you or anyone in this household have high speed internet access through a smartphone with a data plan? 1. Yes 2. No		CHAR(1)
DIVISION	Census Division 1 New England 2 Middle Atlantic 3 East North Central 4 West North Central 5 South Atlantic 6 East South Central 7 West South Central 8 Mountain 9 Pacific		CHAR(1)
DESFLG	Design Flag 10 2010 Design 00 2000 Design		CHAR(2)

F. Variable Additions in IHB file
Beginning in 2015Q1 the following variables will be added to the IHB files.

Variable	Description	Flag	Type
HHISUBPD	Is the subsidy paid directly to the health insurance company? 1. Yes 2. No	HHIS_BPD	CHAR(1)

Variable	Description	Flag	Type
PORTAL	Was the policy obtained through ST_PORTAL Healthcare.gov? 1. Yes 2. No	PORTAL_	CHAR(1)
PORTPLAN	Is this policy a platinum, gold, silver, bronze, or catastrophic plan? 1. Platinum plan 2. Gold plan 3. Silver plan 4. Bronze plan 5. Catastrophic plan	PORT_LAN	CHAR(1)
PREMSUBS	Is the cost of the premium subsidized based on YR_YRCUS income? 1. Yes 2. No	PREM_UBS	CHAR(1)

G. Variable Additions in IHC file

Beginning in 2015Q1 the following variables will be added to the IHC files.

Variable	Description	Flag	Type
OTHMDCOV	How many members of your household are covered by these plans?	OTHM_COV	NUM(8)
OTHMED	Are you, or any member, covered by a plan such as VA Medical, CHAMPVA, STCHIP, or Indian Health Service (IHS)? 1. Yes 2. No	OTHMED_	CHAR(1)

H. Variable Additions in UTA file

Beginning in 2015Q1 the following variable will be added to the UTA files.

Variable	Description	Flag	Type
TELBLPRS	Is respondent referring to a detailed bill, including online or digital? Do not include checkbooks. 1. Yes 2. No	TELB_PRS	CHAR(1)

I. Variable Additions in OPB file

Beginning in 2015Q1 the following variable will be added to the OPB files.

Variable	Description	Flag	Type
DEEDED	Is this a deeded or right-to-use timeshare? 1. Deeded 2. Right-to-use	DEEDED_	CHAR(1)

Diary Survey

A. Variable Additions in FMLD file

Beginning in 2015Q1 the following variables will be added from the FMLD files. In the 2015 data, CE deleted variables that were related to calculating the poverty threshold because CE determined that this data are not reliable.

Variable	Description	Flag	Type
DIVISION	Census Division 1 New England 2 Middle Atlantic 3 East North Central 4 West North Central 5 South Atlantic 6 East South Central 7 West South Central 8 Mountain 9 Pacific		CHAR(1)
INT_HOME	Does this home have high-speed internet access, such as DSL, cable broadband, or FiOS? Does not include dial-up. 1. Yes 2. No	INT__OME	CHAR(1)
INT_PHON	Do you or anyone in this household have high speed internet access through a smartphone with a data plan? 1. Yes 2. No	INT__HON	CHAR(1)

B. Variable Deletions in FMLD file

Beginning in 2015Q1 the following variables will be added from the FMLD files. In the 2015 data, CE deleted variables that were related to calculating the poverty threshold because CE determined that this data are not reliable.

Variable	Description	Flag	Type
ADDFEDX	During the past 12 months, what was the total amount PAID for Federal income tax, in addition to that withheld from earnings, by ALL CU members? S04B 4a	ADDFEDX_	NUM(8)
ADDOTHX	During the past 12 months, what was the total amount PAID for other taxes not reported elsewhere by ALL CU members? S04B 4d	ADDOTHX_	
ADDSTAX	During the past 12 months, what was the total amount PAID for state and local income taxes, in addition to that withheld from earnings, by ALL CU members?	ADDSTAX_	NUM(8)

	S04B 4b		
FEDREFX	During the past 12 months, what was the total amount of refund received from Federal income tax by ALL CU members? S04B 3a	FEDREFX_	NUM(8)
FFEDTXX	Amount of Federal income tax deducted from last pay annualized for all CU members (sum ANFEDTXX from MEMB file for all CU members)	FFEDTXX_	NUM(8)
FFEDTXX1	Imputation Iteration #1 -FFEDTXX		NUM(8)
FFEDTXX2	Imputation Iteration #2 -FFEDTXX		NUM(8)
FFEDTXX3	Imputation Iteration #3 -FFEDTXX		NUM(8)
FFEDTXX4	Imputation Iteration #4 -FFEDTXX		NUM(8)
FFEDTXX5	Imputation Iteration #5 -FFEDTXX		NUM(8)
FFEDTXXM	Amount of Federal income tax deducted from last pay annualized for all CU members (sum ANFEDTXX from MEMB file for all CU members)	FFED_XXM	NUM(10,1)
FSTATXX	Amount of state and local income taxes deducted from last pay annualized for all CU members (sum ANSTATX from MEMB file for all CU members)	FSTATXX_	NUM(8)
FSTATXXM	Amount of state and local income taxes deducted from last pay annualized for all CU members (sum ANSTATXM from MEMB file for all CU members)	FSTA_XXM	NUM(10,1)
FSTATXX1	Imputation Iteration #1 - FSTATXX		NUM(8)
FSTATXX2	Imputation Iteration #2 - FSTATXX		NUM(8)
FSTATXX3	Imputation Iteration #3 - FSTATXX		NUM(8)
FSTATXX4	Imputation Iteration #4 - FSTATXX		NUM(8)
FSTATXX5	Imputation Iteration #5 - FSTATXX		NUM(8)
PERSTAX	Amount of personal taxes paid by CU in past 12 months (ADDFEDX + ADDSTAX + ADDOTHX + FFEDTXX + FSTATXX + TAXPROPX) - (FEDREFX + STATREFX + OTHREFX) *L BLS derived	PERSTAX_	NUM(8)
PERSTAXM	Amount of personal taxes paid by CU in past 12 months (ADDFEDX + ADDSTAX + ADDOTHX + FFEDTXXM + FSTATXXM + TAXPROPX) - (FEDREFX + STATREFX + OTHREFX) *L	PERS_AXM	NUM(11,1)
PERSTAX1	Imputation Iteration #1 - PERSTAX		NUM(9)
PERSTAX2	Imputation Iteration #2 - PERSTAX		NUM(9)
PERSTAX3	Imputation Iteration #3 - PERSTAX		NUM(9)
PERSTAX4	Imputation Iteration #4 - PERSTAX		NUM(9)

PERSTAX5	Imputation Iteration #5 - PERSTAX		NUM(9)
STATREFX	During the past 12 months, what was the total amount of refund received from state and local income tax by ALL CU members? S04B 3b	STAT_EFX	NUM(8)
FINCAFTX	Amount of CU income after taxes in past 12 months (FINCBEFX - PERSTAX) *L BLS derived	FINC_FTX	NUM(8)
FINCAFTM	Amount of CU income after taxes in past 12 months (FINCBEFM - PERSTAX) *L BLS derived	FINC_FTM	NUM(11,1)
FINCAFT1	Imputation Iteration #1 - FINCAFTX		NUM(9)
FINCAFT2	Imputation Iteration #2 - FINCAFTX		NUM(9)
FINCAFT3	Imputation Iteration #3 - FINCAFTX		NUM(9)
FINCAFT4	Imputation Iteration #4 - FINCAFTX		NUM(9)
FINCAFT5	Imputation Iteration #5 - FINCAFTX		NUM(9)

C. Variable Deletions in MEMD file

Beginning in 2015Q1 the following variables will be added from the FMLD files. In the 2015 data, CE deleted variables that were related to calculating the poverty threshold because CE determined that this data are not reliable.

Variable	Description	Flag	Type
ANFEDTXX	Annualized amount of Federal income tax deducted from last pay ((FEDTXX/GROSPAYX) x WAGEX) BLS derived	ANFE_TXX	NUM(8)
ANFEDTXM	Annualized amount of Federal income tax deducted from last pay ((FEDTXX/GROSPAYX) x WAGEM)	ANFE_TXM	NUM(8)
ANSTATXX	Annualized amount of state and local income taxes deducted from last pay ((STATXX/GROSPAYX) x WAGEX) BLS derived	ANST_TXX	NUM(8)
ANSTATXM	Annualized amount of state and local income taxes deducted from last pay ((STATXX/GROSPAYX) x WAGEM)	ANST_TXM	NUM(8)