# Use of Financial Records in the CE Survey

#### **Brandon Kopp**

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#### U.S. Consumer Expenditure Records Study

#### **Final Report**

Prepared for

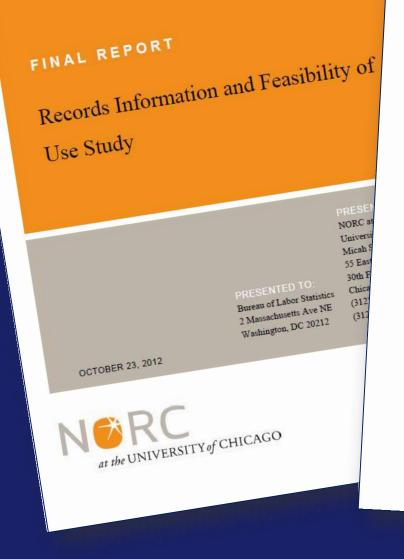
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# **CE Records Study**

#### Goals

What records are available and from whom?
 How do participants' self-reports compare to those records?

#### Methods

- ► 115 participants from North Carolina and DC
- ► 2 visits, 1 week apart
  - Visit 1 Shortened CEQ interview (9 Sections)
  - Visit 2 Comparison of financial records to selfreports



### **CE Records Study**

What records are available and from whom?

Records were provided for 36% of the 3,039 expenditures reported in Visit 1
 Participant characteristics positively associated with having records:

 Non-Hispanic Whites
 Women
 DC Residents
 Home Owners

 Expenditure characteristics positively associated with having records:
 Recent Purchases
 More Expensive Purchases



### **CE Records Study**

How do participants' self-reports compare to those records?

- Over- and Under- reporting were not common ▶ 81 items (3%) on records but not reported in Visit 1 ▶ 34 items (1%) reported erroneously in Visit 1 Participants' accuracy in reporting expenditure amounts was low ► Matched record exactly - 30% ▶ Within 10% of correct amount - 53% ► >5-10% over the correct amount - 33%  $\blacktriangleright$  >5-10% <u>under</u> the correct amount - 37% On average, participants were off by 36%
  - Over- and Under- estimation tended to cancel each other out



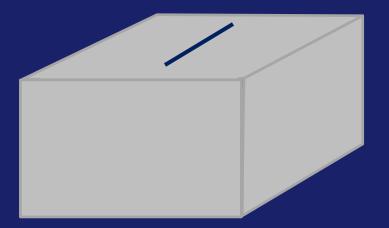
# How much better are records than self-reports? In this sample, much more accurate

How useful are records in actual practice?



### **Tin Box**

- Ask respondents to gather their records
  - Prospectively
  - Retrospectively
- Provide those records to interviewer for scanning/data entry



### **Tin Box**





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Date	Item	Description	Price
12/22/10	BABY PLD CARR	Fresh Vegetables	1.50
12/22/10	CELERY 30 CT	Fresh Vegetables	1.99
12/22/10	GREEN CABBAGE	Fresh Vegetables	2.80
12/14/12	XFINITY Internet	Cable, Satellite, and Internet Services	55.95

# **Types of Financial Records**

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- Point-of-Purchase Receipts
- Bills
- Website Printouts
- E-mail Receipts
- Bank Statements
- Credit Card Statements
- Written Notes
- Financial Software Printouts
- Package Invoices
- Service Invoices



### Records Information and Feasibility of Use (RIFU) Study

#### Goals

- What information necessary for completing the CE surveys is available on financial records?
- What additional information can be collected from records?

#### Methods

- ► 152 participants from the Chicago area
- ► 2 visits, 2 weeks apart
  - Visit 1 Explain record collection task
  - Visit 2 Scan records, questions about the interview experience
- ► Enter data from records into database



## **RIFU Study**

#### 2,985 records were provided

- Average: 19.6/household
- ► Range: 0 232 records/household
- 86.3% or records were receipts, only 0.8% were bills
- 9,903 items contained on the records
  - ► Average: 3.9 items/record
  - ► Range: 1 133 items/record
  - 69.5% of items were classified as food purchases,
     9.3% as housing, 4.4% as apparel



### **Transaction Date**

 Present on 98.3% of collected records

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# **Item Description**



Coders attempted to fit item descriptions
 into a 4-tier, 72 category scheme

1 Food

- 2 Food at Home
- 3 Meats, Poultry, Fish, Eggs
- 4 Poultry
- 1 Personal Care Products and Services
- A subset of items were double-coded for reliability purposes

Full Match	69.3%
Mismatch (same top category)	22.4%
Unmatched	8.3%

### **Item Price**

#### • Present on collected records

Item Price	99.3%
Total Price	98.3%
Tax (Amount Paid)	64.9%
Tax Rate	29.4%
Shipping Cost	0.1%



### **Outlet Information**

Giant		Gia	ant°
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GROCERY FRNCH FRD ONIONS BonusCard Savings PRICE PAID 1 # 2 for \$4.00 LT/FLFFY NDL 12Z MC BAY LEAVES SB HON NT OAT NEAT TY GFL CHXERSTP	-1.20 F 2.99 2.00 F 3.29 F 2.79 F 8.99 F	•	Pres
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JEFF MARCONI, STR MGR. 301- GIANT #3	585-1670 5 <b>4</b>		

#### Present on collected records

Outlet Name	89.3%
Outlet Address	88.6%
Outlet Phone Number	84.6%

#### Personally Identifiable Information (PII)

#### • Present on collected records

Respondent Name	9.1%
Respondent Address	2.7%
Respondent Phone Number	1.4%
Credit Card Number (Full)	0.3%
Credit Card Number (Last 4)	41.4%
Customer ID	10.9%

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Contact us: 🔘 www.comcast.com 🛞 1-690-XFINITY	Total Amount Due 5161.12 Payment Due by 01/05/13 Page 1 c	ésa:
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	Total New Charges	\$161.12
special offers and promotions. Not all products, and services ovaliable in all areas. Certain estrictions apply	Thank you for bailing	
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You can make one time, as well as recurring, credit card asyments at no charge through our website: www.comeant.com.		

comcast.	Account Number	Customer ID #
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BEDS ANNUAPOLIS RD LANNAM NID 30106-0006	<b>Total Amount Due</b>	\$161.12
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### **Information Not on Records**

Food and Drinks Away From Home

 Meal (breakfast, lunch, dinner, snack/other)
 Outlet Type (fast food, full service)

 Food and Drinks for Home Consumption

 Packaging (fresh, frozen, bottled/canned, other)

 Clothing, Shoes, Jewelry, and Accessories

 Gender





## Conclusions

- Comparison of self-reports and records revealed some over/under reporting and extensive over/under estimation
- Collecting records for all household expenses is difficult
- Records, by themselves, provide a lot, but not all, of the information CE needs; respondent interaction is still needed



## **Future Challenges**

- Collecting a comprehensive set of records
  - Collecting more online/digital records
- Capturing transactions that do not yield records
- Easily and accurately converting records into tabular data



# **Special Thanks**

#### CE Records Study Team

- ► At BLS:
  - Neil Tseng
  - Janel Brattland
  - Jeanette Davis
- ► At Census:
  - Chris Stringer
  - Richard Schwartz
- ► At RTI:
  - Emily Geisen
  - Charles Lau
  - Ashley Richards
  - Joan Wang

#### RIFU Study Team

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  - Jennifer Edgar
  - Jeanette Davis
- ► At NORC:
  - Lisa Lee
  - Micah Sjoblom



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