

ABOUT THE CONSUMER EXPENDITURE SURVEYS: A LARGE, FREE, PUBLICLY AVAILABLE DATA SOURCE

Geoffrey Paulin, Ph.D.

Senior Economist

Division of Consumer Expenditure Surveys
American Council on Consumer Interests (ACCI)

May 23, 2024

Virtual Panelist for In-Person Event



About the Consumer Expenditure Surveys (CE)

- Name, organization, role, data source
- Origin story/history
- Sampling details/methodology
- Collection mode
- Weighting approach
- Availability for use (is it available to download, or something else?)
- Anything else you think is meaningful!



About the Consumer Expenditure Surveys (CE)

■ Name, organization, role, data source

- ▶ Sponsored by the Bureau of Labor Statistics (BLS), Collected by Census Bureau
- ▶ To provide the “market basket” for the Consumer Price Index (CPI), and to benefit users like you!
- ▶ Collected directly from consumers across the U.S.

■ Origin story/history

- ▶ First national surveys: 1888-91 in response to the McKinley Tariff
- ▶ Early surveys in response to economic conditions (1901, 1917-19, 1935-36, 1940's)
- ▶ Roughly decennial thereafter until 1972-73 (oil shock renders data outdated as soon as they are collected!)
- ▶ Annual data published for first time in 1980, with consistent format from 1984 onward



About the Consumer Expenditure Surveys (CE)

■ Sampling details/methodology

- ▶ Nationally representative sample of U.S. “consumer units” (similar to household or family)
- ▶ Interview and Diary Surveys
 - Independent samples
 - Interview:
 - Three-month recall survey, administered for four consecutive quarters
 - Designed to capture “big ticket” and recurring expenditures
 - Diary:
 - Respondent records daily expenditures for two weeks
 - Designed to capture “small ticket” and frequently occurring expenditures
 - Excellent detail for food, especially from grocery stores: round steak; rice; lettuce; cheese; peanut butter; and jelly (well, jams, preserves, and other sweets)

■ Collection mode

- ▶ In person is preferred for both (in Diary, for characteristics only; respondent fills out form in private)
- ▶ Telephone/online in certain circumstances

About the Consumer Expenditure Surveys (CE)

■ Weighting approach

- ▶ Data are pseudorandom, so for some purposes, weights are optional
- ▶ Weights allow for computation of nationally representative means
 - Region, Census Division, Major Metropolitan Statistical Area means also available
- ▶ Special weights allow for computation of variance/standard error (Balanced Repeated Replication, or “BRR” method) for national/regional/urban vs. rural areas, and by size of area (population)
- ▶ Region, Census Division, Major Metropolitan Statistical Area
- ▶ State weights for five states historically, but four currently
 - For means only; not for variance/standard error
 - New York, Florida, Texas California weights available today; New Jersey series discontinued for statistical reliability reasons

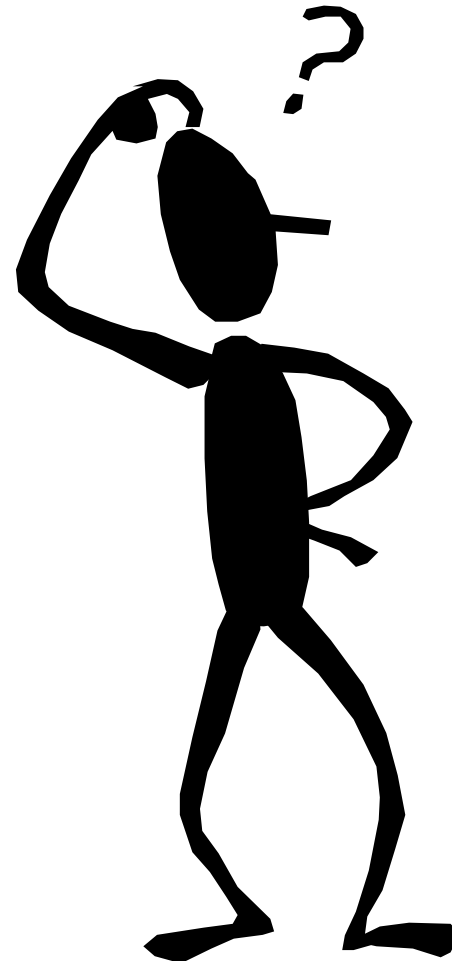
■ Availability for use (is it available to download, or something else?)

- ▶ Tables and microdata available for free download at www.bls.gov/cex



About the Consumer Expenditure Surveys (CE)

- Anything else you think is meaningful!
 - ▶ Good grief! So much more to learn...
 - ▶ What to say... what to say....



I know!!!



Join Us!
The Consumer Expenditure Surveys Microdata Users' Workshop
July 2025
Virtual Event



NO REGISTRATION FEE!

Workshop details available at:

Training materials available here:

- **Getting Started Guide--**
<https://www.bls.gov/cex/pumd/documentation/trainings.zip>
- **Data Sets (1980-81, 1984-2022)--**
https://www.bls.gov/cex/pumd_data.htm

Contact Information

Geoffrey Paulin, Ph.D.

Senior Economist

Division of Consumer Expenditure Surveys

www.bls.gov/cex

paulin.geoffrey@bls.gov

