

Strategic Partnerships to Improve Household Income and Expenditure Surveys

Anya Stockburger, Bureau of Labor Statistics

Melissa Braybrooks, Department of Interior

Rebecca L. Morrison, Bureau of Labor Statistics

FCSM

March 11, 2026



US Territories Facts

- The US territories are part of the United States.
 - ✓ Residents of the territories are US citizens or US nationals
 - ✓ Use US currency
 - ✓ Have representation in Congress

- Though their populations are small they are strategically important.



Fundamental Responsibilities of Federal Statistical Agencies

Statistical Policy Directive #1

Affirms the fundamental responsibilities of Federal statistical agencies and units

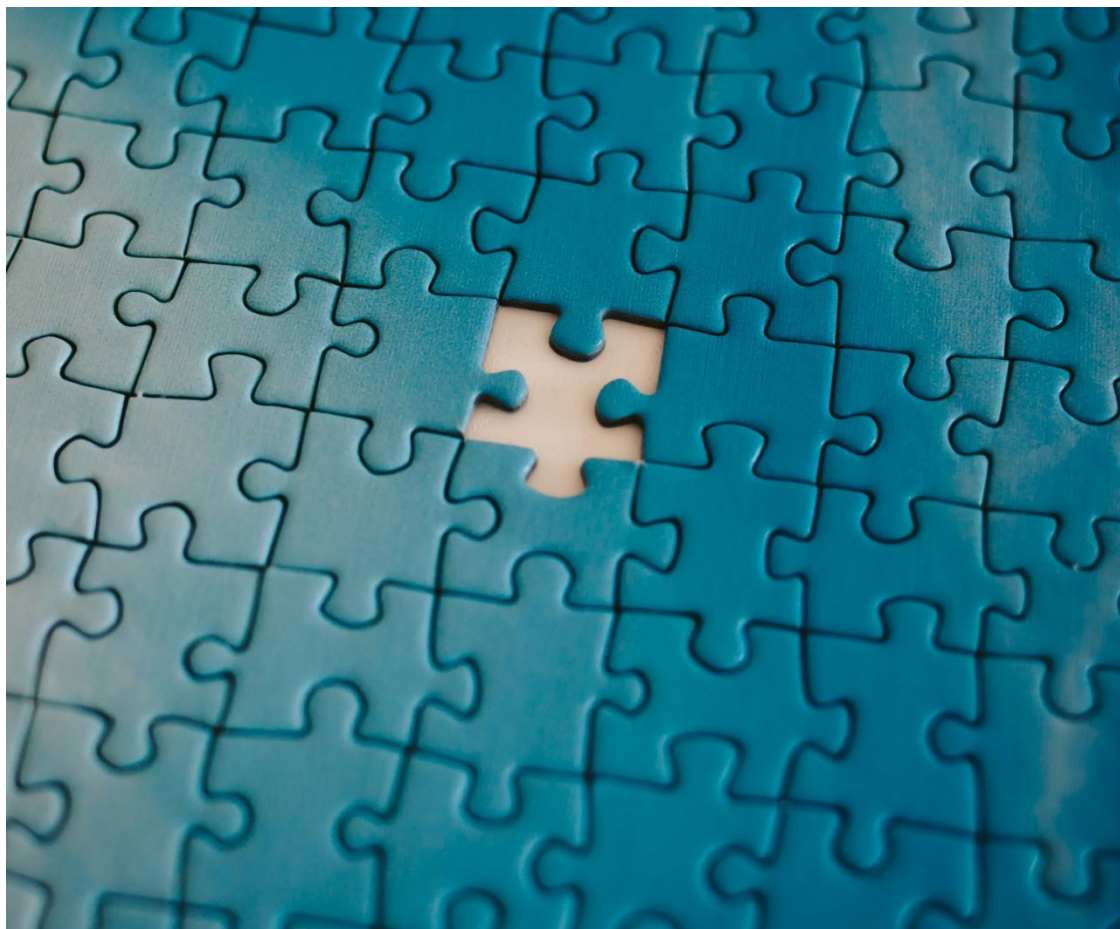
Responsibility 1:

Produce and disseminate relevant and timely information

“Federal statistical agencies and recognized statistical units must seek input regularly from the broadest range of private- and public-sector data users, including analysts and policy makers within Federal, State, local, tribal, and territorial government agencies; academic researchers; private sector businesses and constituent groups; and non-profit organizations.”



Outline



Role of BLS to improve territorial statistics:

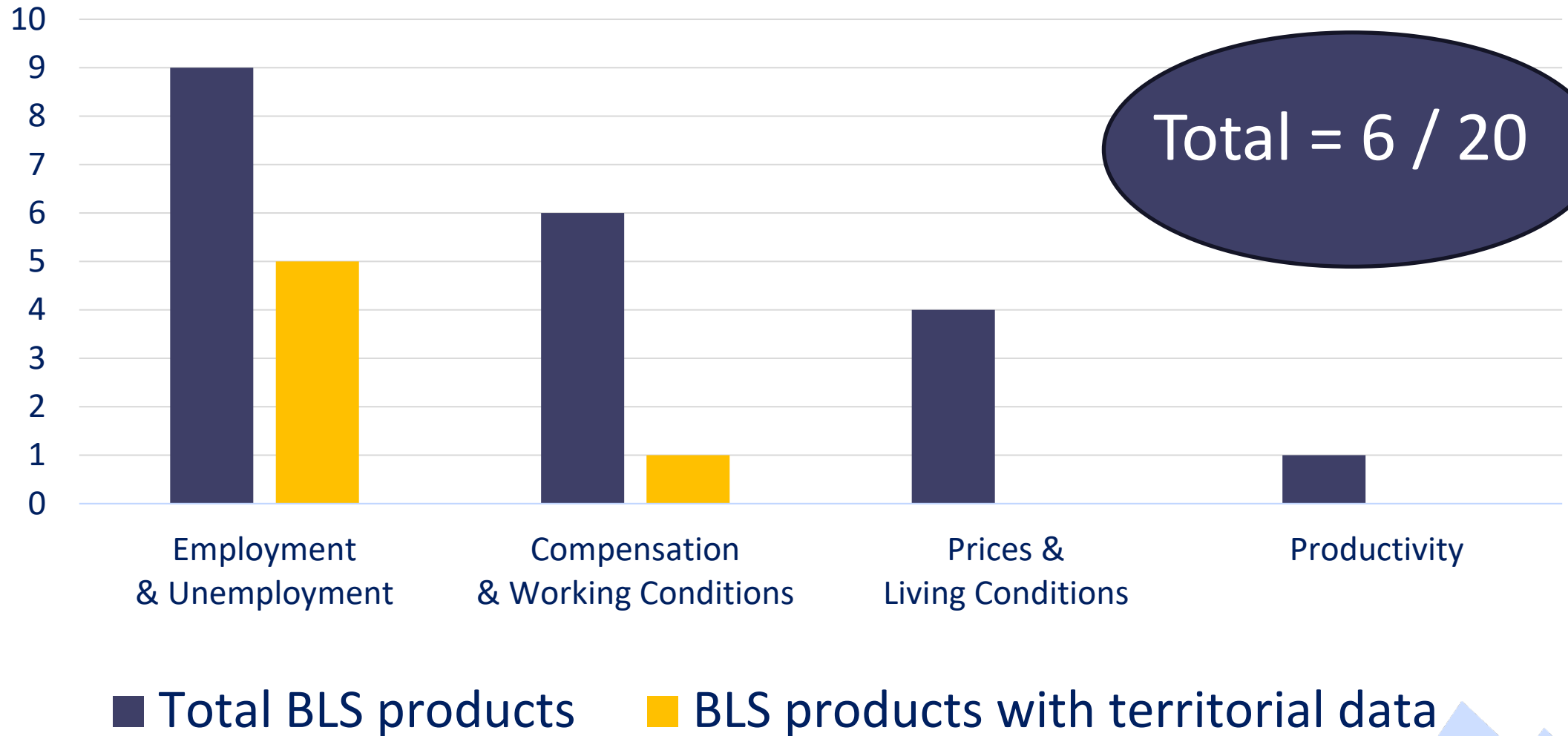
1. Current partnerships
2. Successes and limitations of current partnerships
3. New partnership ideas

Current Partnerships

BLS territorial data

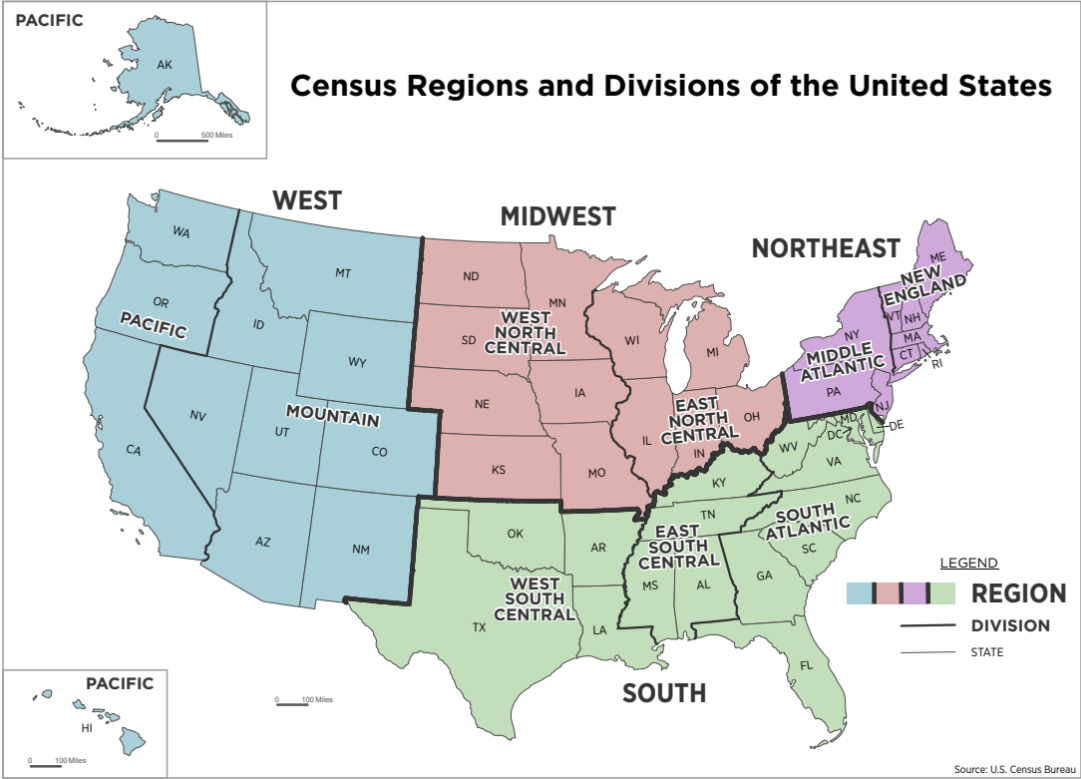


BLS Statistical Products



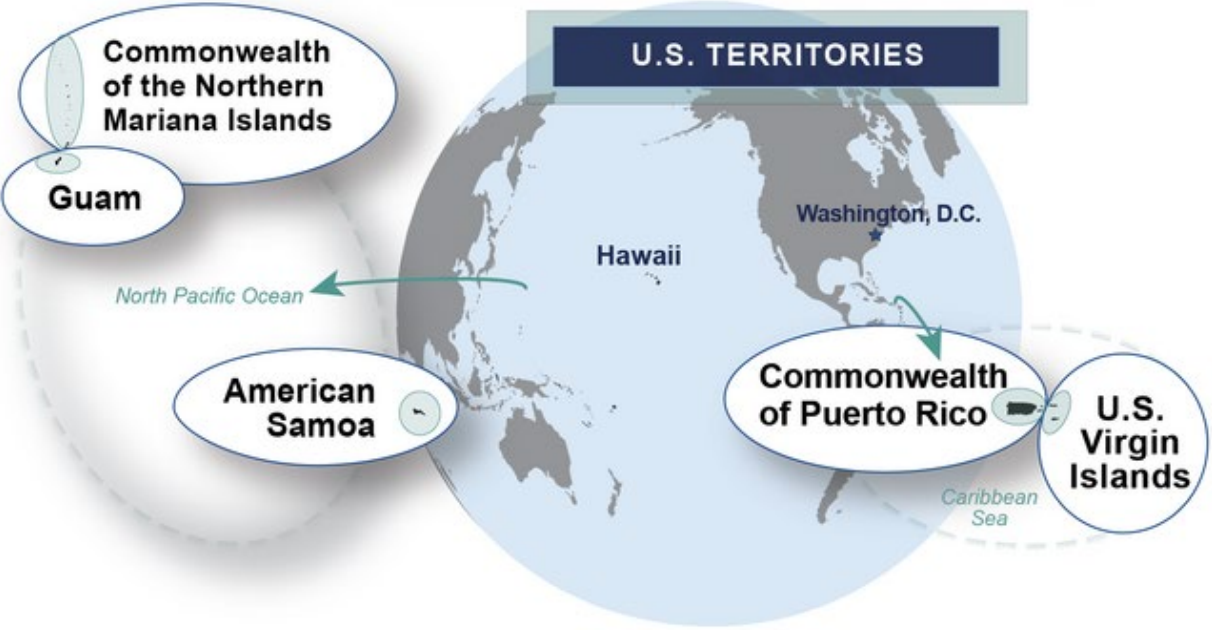
Challenges for Inclusion

Sampling



Source: US Census Bureau

Data Collection



Source: Government Accountability Office



BLS Territorial Statistical Products (6)

Topic	Program	Puerto Rico	US Virgin Islands	Guam	American Samoa	CNMI
Employment and wages by industry	Quarterly Census of Employment and Wages (QCEW)	✓	✓	✗	✗	✗
Job gains and losses	Business Employment Dynamics (BED)	✓	✓	✗	✗	✗
Employment, hours, earnings	Current Employment Statistics (CES)	✓	✓	✗	✗	✗
Unemployment	Local-Area Unemployment Statistics (LAUS)	✓	✗	✗	✗	✗
Employment and wages by occupation	Occupation Employment and Wages Survey (OEWS)	✓	✓	✓	✗	✗
Injuries, illnesses, and fatalities	Injuries, Illnesses, and Fatalities (CFOI, SOII)	✓	✓	✓	✗	✗



Federal-State Cooperative Program

- Joint program between BLS and State Workforce Agencies (SWA)
 - ▶ BLS provides the procedures and technical support, draws the sample, and produces the survey materials
 - ▶ SWAs usually collect data (CES collected by BLS)
- Territories
 - ▶ PR, USVI, Guam mostly treated like states
 - ▶ Adaptations for local needs:
 - CES collected by territories
 - Guam sample frame not QCEW
 - Use of paper forms

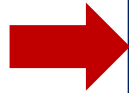


Successes and Limitations of Current Partnerships

example from Guam



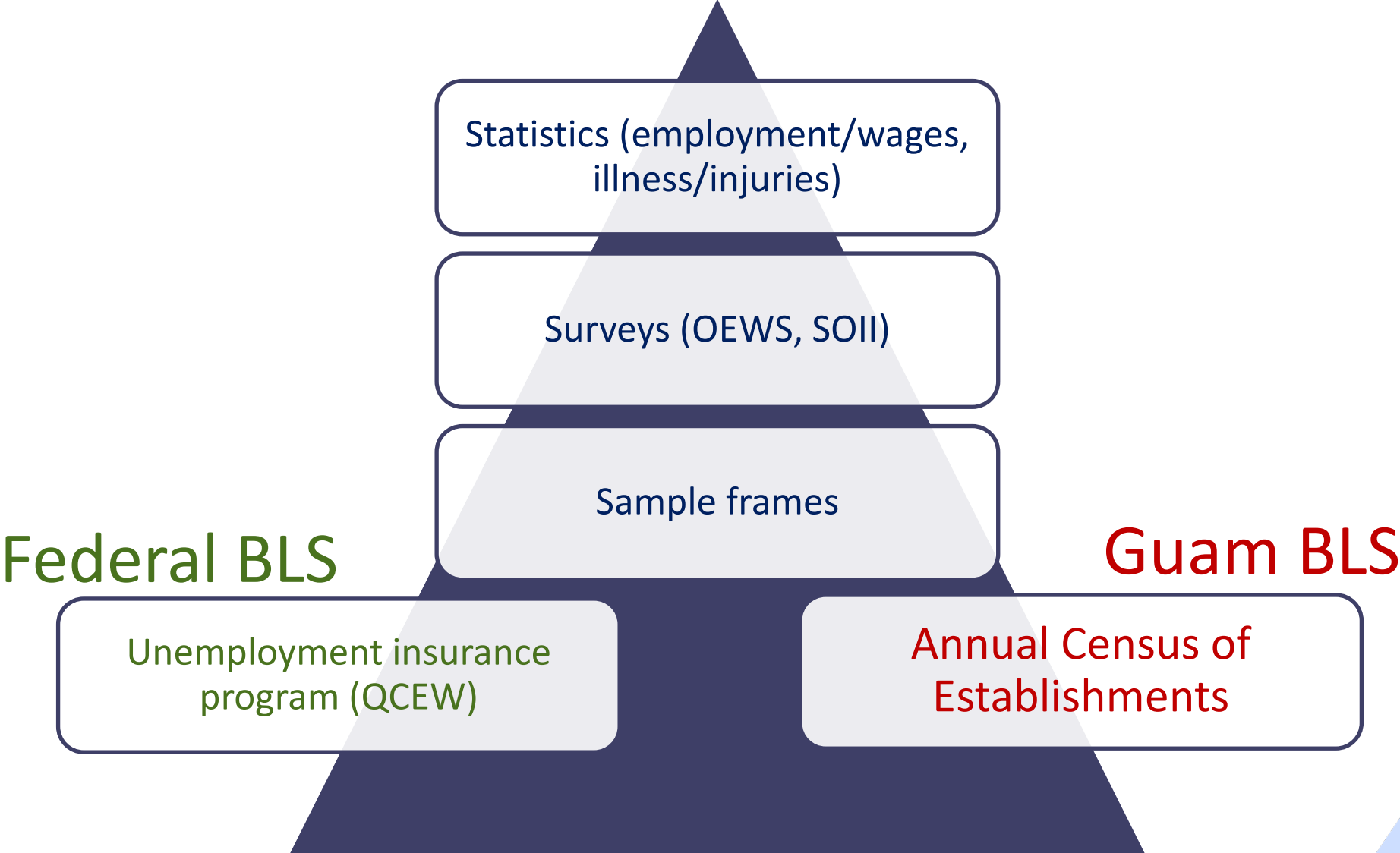
BLS Territorial Statistical Products (2)



Topic	Program	Puerto Rico	US Virgin Islands	Guam	American Samoa	CNMI
Employment and wages by industry	Quarterly Census of Employment and Wages (QCEW)	✓	✓	✗	✗	✗
Job gains and losses	Business Employment Dynamics (BED)	✓	✓	✗	✗	✗
Employment, hours, earnings	Current Employment Statistics (CES)	✓	✓	✗	✗	✗
Unemployment	Local-Area Unemployment Statistics (LAUS)	✓	✗	✗	✗	✗
Employment and wages by occupation	Occupation Employment and Wages Survey (OEWS)	✓	✓	✓	✗	✗
Injuries, illnesses, and fatalities	Injuries, Illnesses, and Fatalities (CFOI, SOII)	✓	✓	✓	✗	✗



Current Partnership Success



Current Partnership Limitations

Federal BLS

Monthly employment and wages statistics

Current Employment Statistics (CES)

Sample frames

Unemployment insurance program (QCEW)

Guam BLS

Quarterly employment and wages statistics

Current Employment Statistics (CES)

Sample Frames

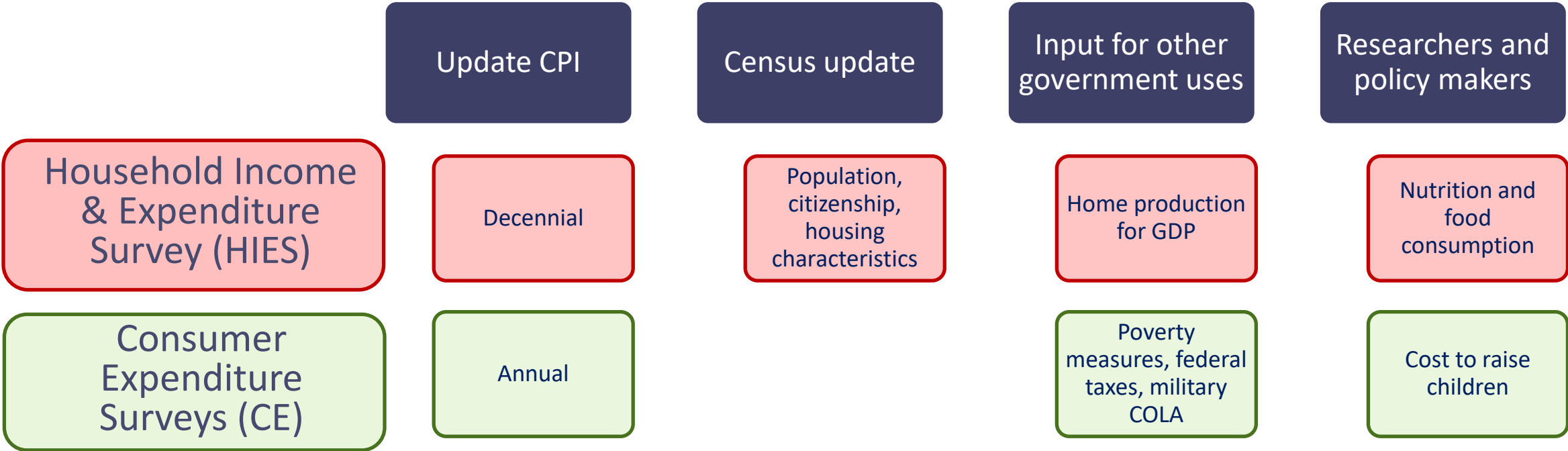
Annual Census of Establishments

New Partnership Idea

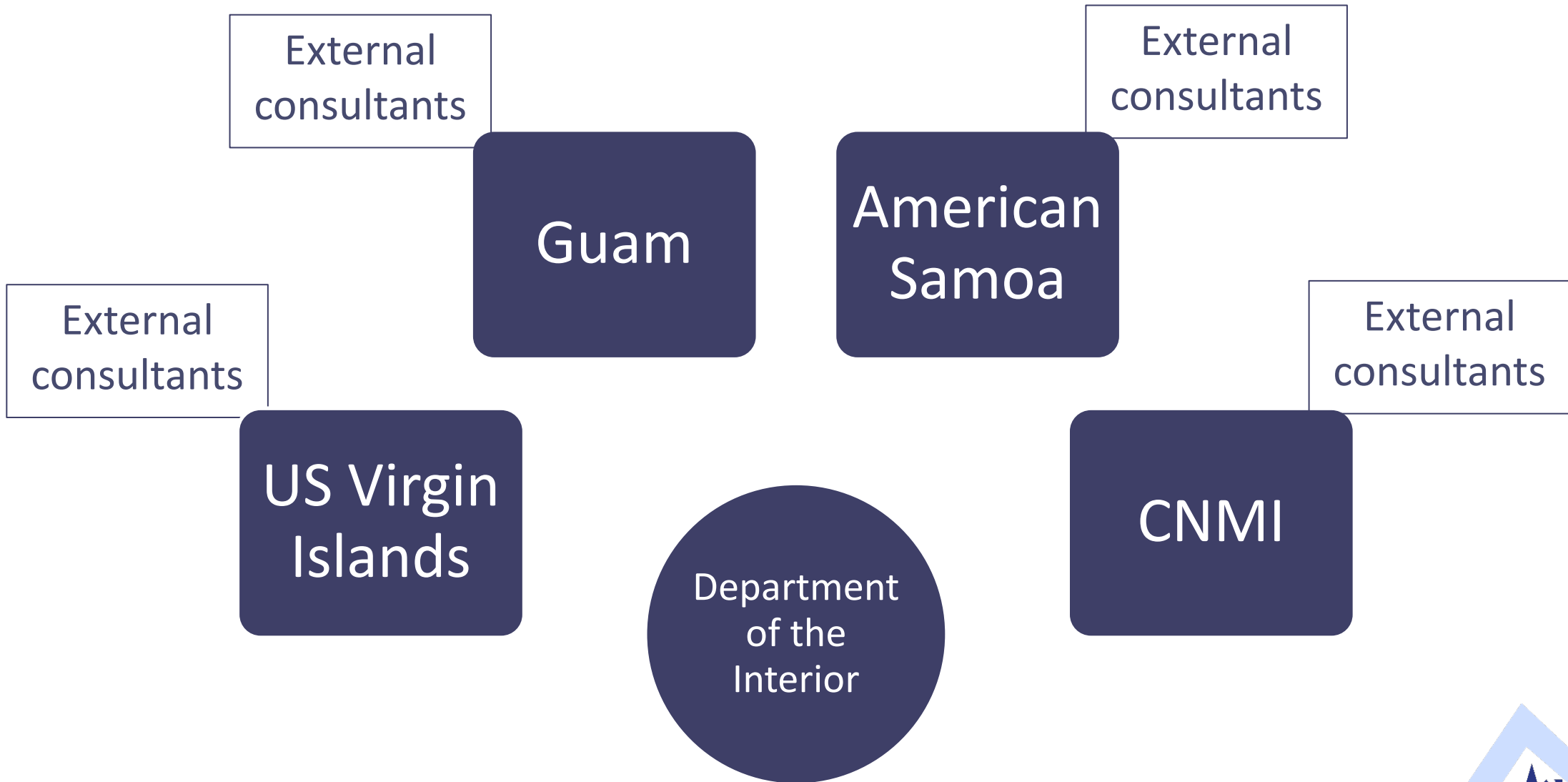
Household Income and Expenditure Survey (HIES)



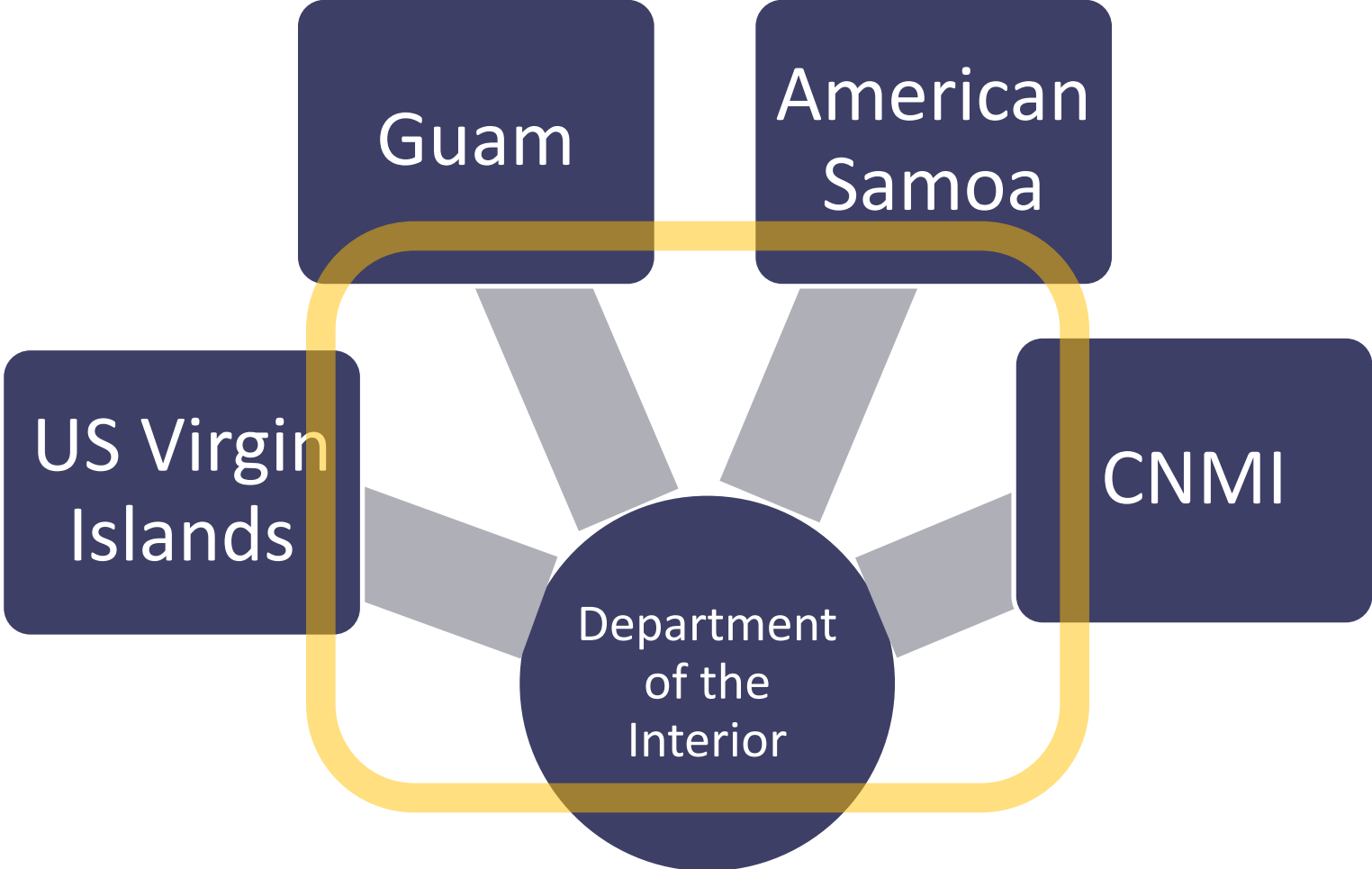
Why collect income and expenditure data?



Historical HIES



New HIES Partnerships



BLS Consultants



Opportunities to improve the HIES

■ Gain efficiencies

- ▶ Territories learn from each other
- ▶ Guam 2023 reduced housing characteristics questions by more than half (30 questions instead of 60)

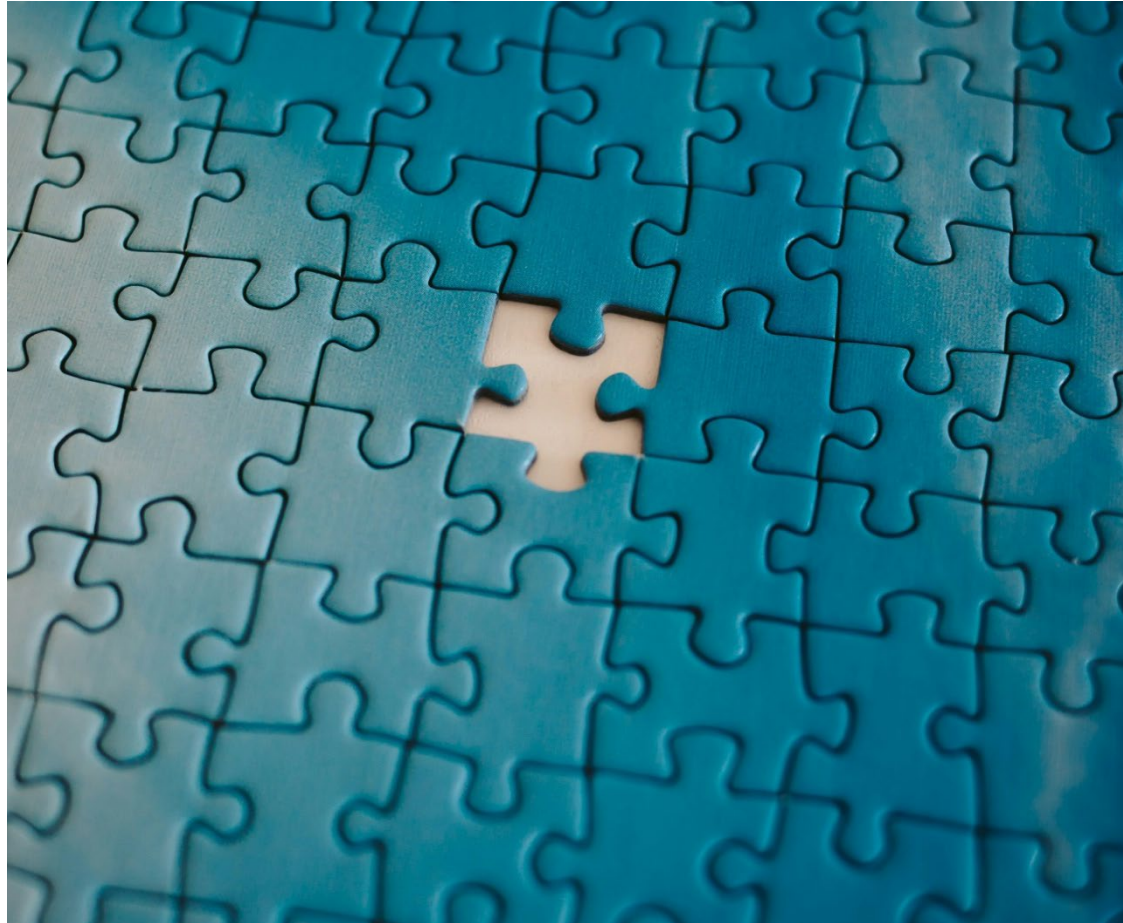
■ Adopt best practices

- ▶ Questionnaire design, recall period, incentive use
- ▶ Electronic collection

■ Fill capacity gaps (technical and methodological)

- ▶ Data processing and imputation
- ▶ CPI reweighting

Potential Path for Improving Territorial Statistics



- New partnership is established
- What happens next?

Questions?

