

March 3, 2008

MEMORANDUM FOR: Reviewer of 1220-0050

FROM: SIOUX GROVES, Chief  
Division of Consumer Expenditure Surveys  
Bureau of Labor Statistics

SUBJECT: Non-Substantive Change Request for the Consumer Expenditure Survey (CE) – Tax Rebate Questions

In 2001, the Consumer Expenditure Survey added several questions to the Interview survey to capture data on the 2001 Tax Rebate. The data collected allowed researchers to assess the effect of the 2001 rebate on consumer spending.

We are now seeking approval to add to the CE Interview Survey a set of questions about the 2008 Tax Rebate recently approved by the Federal Government. To allow for an easier comparison of the 2008 dataset to the 2001 dataset, the questions we propose to add to the 2008 survey are nearly identical to the questions we added in 2001. In addition, we propose to add a question about use of the rebate. This question is similar to a question asked in the Survey of Consumers conducted by the University of Michigan in 2001 regarding the 2001 Tax Rebate. At the request of researchers, we also propose the addition of a question about whether the rebate was received by check or direct deposit to aid in their analysis.

Together, the questions will capture: the receipt of one or more tax rebates by the Consumer Unit (CU), the month the CU received the rebate(s), the amount of the rebate(s), how the CU received the rebate(s), and the primary use of the rebate(s). In most cases, the CU will not report the use of the rebate until one quarter after the CU receives the rebate. (The exception is when the CU is in their fifth and final interview wave when they report receiving the rebate.) Questions will be included in the survey from June 2008 through March 2009. This time period ensures we capture data for as many recipients of the 2008 tax rebate as possible, particularly respondents who wait until October 2008, to file a Federal tax return. The additional questions are expected to take approximately 1 minute to answer. This will increase the burden estimate by 147 hours. Please refer to Attachment A for the specific questions we propose adding to the 2008 CE Interview survey.

To ensure these questions capture the needs of data users, the following researchers were given the opportunity to participate in the development of and review of these questions:

- John Greenlees, Bureau of Labor Statistics, DPINR
- David Johnson, U.S. Census Bureau
- Robert McClelland, Bureau of Labor Statistics, DPINR
- Jonathan Parker, Kellogg School of Management, Northwestern University
- Ralph Rector, U.S. Department of Treasury
- Nicholas Souleles, The Wharton School, University of Pennsylvania

OMB approved the current questionnaire in the Notice of Action dated March 9, 2007. Current OMB approval of the CE surveys is scheduled to expire March 31, 2010.

If you have any questions about this request, please contact Sioux Groves at 202-691-5123 or e-mail at [groves.sioux@bls.gov](mailto:groves.sioux@bls.gov) or Carolyn Pickering at 202-691-6876 or e-mail at [Pickering.Carolyn@bls.gov](mailto:Pickering.Carolyn@bls.gov).

**ATTACHMENT A** - 2008 CE Interview Survey Proposed Tax Rebate Questions

*Section 19B Changes and Additions*

Add or modify the following questions:

[fill: Earlier this year/Last year] the Federal government approved an economic stimulus package. [fill: This year many households will receive a one time tax rebate, either by check or direct deposit./Previously [fill: YOU\_YRCU] reported receiving one or more rebates.] This is different from a refund on your annual income taxes.

Since the first of [fill: REF\_MONTH], have [fill YOU\_ANYMEM] received [fill: a/an additional] -

\* Read each item on list

10. Tax rebate?

99. None/No more entries

888. Delete the line

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Who was the rebate for?

\* Collect each rebate separately. Enter name of recipient.

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In what month did you receive the rebate?

\* Probe if the amount is not an expected increment such as \$300, \$600, \$900, \$1,200, etc.

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What was the amount of the rebate?

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Was the rebate received by -

1. check?

2. direct deposit?

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Did [fill: YOU\_ANYMEM] receive any other tax rebate?

1. Yes

2. No

Section 20B Addition

[fill: Earlier in this interview/Last interview] [fill: you/your CU] reported receiving a one-time tax rebate that was part of the Federal government's economic stimulus package. Did the rebate lead [fill you/your CU] mostly to increase spending, mostly to increase savings, or mostly to pay off debt?

1. mostly to increase spending
2. mostly to increase saving
3. mostly to pay off debt

Section 22B Change

During the last 12 months, did [fill: YOU\_ANYMEM] receive any REFUNDS from any of the following -

Federal income tax? Do NOT include the amount received for the one time economic stimulus package tax rebate.

1. Yes
2. No