

## Appendix B: Cognitive Testing Protocol

The protocol includes the question that will be tested, additional questions that provide context for the tested question, and debriefing questions. The interviewer may ask unscripted follow-up questions if a participant's answer suggests additional, pertinent information can be gained.

### **Introductory Material**

- Hi! Thank you for coming in today.
- I am ..... [This is my colleague ( ) who will be taking notes for us today]
- Have you participated in any of our studies before? (if yes, Which ones?)
- [Sign Consent Form/Permission to audiotape] (see Appendix C)
- Explanation:
  - We are going to be working with some questions from the Consumer Expenditure Survey, an ongoing survey that provides information about the buying habits of American consumers. This information is used for a lot of things but its primary purpose is to help calculate inflation. Are you familiar with the inflation rate?
  - What we are going to do today is go through a few questions from the survey and get your reactions to them. The purpose of this session is to help us find out more about how people respond to these questions. Basically, we're trying to find out what you think a question is asking and how hard it is to answer. We are not here to evaluate you, we are looking to improve the questions, so there are no wrong answers. All the information you give us will be kept completely confidential, and will be used to improve the survey questions.
- Any questions before we begin?

### **Question Additions and Modifications**

1. Add business expense screener question to CE Introduction

**As we start, please understand that we ask the same topics of everybody we talk to. I realize some of these questions may not apply to your household.**

**Most questions that I will be asking refer to a specific time period. During this interview, the time period, unless I state otherwise is for the *past three months*, that is, from the 1st day of "*reference month*" to today.**

**Most of my questions are about expenses your household had or bills you've received. You will find it helpful to have your checkbook register, credit card statements and other records as you answer the questions.**

**Before we get started, do you deduct or plan to deduct any of your expenses as business expenses?**

1. Yes
2. No

1. IF REPORTS - What kinds of expenses did you have – can you tell me some examples?
2. Can you rephrase the question in your own words? [probe to understand if they understand

- we mean even just one deductible business expense, rather than a routine behavior]
3. Can you name some examples of things that you would consider a ‘deductible business expense’?
  4. Take a look at this list of expenses – which of these would count as deductible business expenses?
  5. What does ‘deduct’ mean to you? [probe to understand whether they understand we mean tax deductible]
  6. Did you consider the other people in your household when answering this question? [probe to understand whether anyone else in the household has even just one relevant expense]
  7. Who might answer ‘yes, they will deduct business expenses’ – can you name some examples? [probe to understand whether they would include non-business owners but not employees who get reimbursed]
  8. Why do you think we ask this question about whether you have a deductible business expenses? [probe to understand whether they think answering a certain way will shorten the interview]

Examples

Use of your car for work	Home insurance since your office is at home	Airfare that your company paid for	Rent payments for a store
Landline phone service at your business	Payment of your employee’s wages	Storage costs for your store’s stock	Fixing a display window in your store

2. Add questions to health insurance section to capture information on health care exchange policies
3. Update health insurance type question to pick up Tricare policies and replace other health insurance plan questions with new questions for other government health programs

NOTE: Highlights show new questions and new skip patterns in this section.

Existing Question IHB ITEM

**Do you or any members of your household have any hospitalization or health insurance plans or belong to a plan that pays all or part of your medical expenses? Include policies paid for someone outside your household and please consider any special purpose plans you may have, such as dental, vision, or prescription drug insurance.”**

1. Yes
2. No

Skip instructions:

- 1: Goto HINSCMP
- 2: Goto Debriefing Questions

Existing Question HINSCMP

**What is the name of the insurance company for this policy?**

\_\_\_\_\_

Existing Question HHICOVQ

**How many household members are covered by this policy?**

\_\_\_\_\_

Existing Question HHICODE

**What type of insurance plan is it?**

\* Do not collect Medicare prescription drug plans in Commercial Medicare Supplements. Medicare prescription drug plans are collected in Part C.

1. Health Maintenance Organization
2. Fee for Service Plan
3. Commercial Medicare Supplement
4. **Tricare, all types including dental**
5. Other special purpose plan

Skip instructions:

- 1: Goto HHIPOS
- 2-4: Goto HHIGROUP
- 5: Goto HHISPECT

Existing Question HHIPOS

**Under normal circumstances, if you go to a doctor who is not part of your plan without a referral, will your insurance company pay for the cost?**

1. Yes
2. No

Skip instructions:  
goto HHIGROUP

Existing Question HHISPECT

**Is this special purpose insurance plan -**

1. Dental insurance?
2. Vision insurance?
3. Prescription drug insurance?
4. Other type of special purpose health insurance? - Specify

Skip instructions:  
goto HHIGROUP

Existing Question HHIGROUP

**Was the policy obtained on an individual or group basis?**

1. Individually Obtained
2. Group through place of employment
3. Group through other organization

Skip instructions:

- 1, 3, DK, RF: Goto **PORTAL**
- 2: Goto HHIPRYOU

**new question PORTAL:**

**Was the policy obtained through [fill: healthcare.gov/state exchange name]?**

1. Yes
2. No

Skip instructions:

- 1: goto **PORTPLAN**
- 2, DK, RF: goto HHIPRYOU

**new question 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

Skip instructions:  
goto HHIPRYOU

Existing Question HHIPRYOU

**Do you or any member of your household pay ANY portion of the premiums for this policy?**

1. Yes
2. No

Skip instructions:  
1: goto HHIPRDED  
2, DK, RF: goto HHIPROUT

Existing Question HHIPRDED

**Are any premiums paid through payroll deductions?**

1. Yes
2. No

Skip instructions:  
goto HHIRPMB

Existing Question HHIPROUT:

**Who pays the policy premiums?**

1. An employer or union?
2. Another group or persons outside your household?

Skip instructions:  
If PORTAL=1 goto PREMSUBS else goto HHIMORE

Existing Question HHIRPMB

**How much [do you/does your household] currently spend for this plan [including payroll deductions]?  
\_\_\_\_\_ per [Time Period: HHIRPMPD]**

Skip Instructions for HHIRPMPD:  
1-9: If PORTAL=1 goto PREMSUBS else goto HHIMORE  
10,DK,RF: Goto HHIIRGXB

**new question PREMSUBS:**

**Is the cost of the premium subsidized based on [fill: your/your household's] income?**

\* Subsidized health coverage is insurance with a reduced premium. Low and middle income families are eligible to receive tax credits that allow them to pay lower premiums for insurance bought through healthcare exchanges or marketplaces.

1. Yes
2. No

Skip instructions:

- 1: goto HHISUBSPD  
2, DK, RF: goto HHIMORE

**new question HHISUBPD:**

**Is the subsidy paid directly to the health insurance company?**

1. Yes  
2. No

Skip instructions:  
go to HHIMORE

**new question OTHMED:**

**Are ^YOU\_ANYMEM covered by a plan such as VA Medical, CHAMPVA, CHIP[fill:/stateCHIPname], or Indian Health Service (IHS)?**

1. Yes  
2. No

Skip instructions:  
1: if NUMHOUSE gt 1 go to OTHMDCOV else goto S14C\_END  
2, DK, RF: goto S14C\_END

**new question OTHMDCOV:**

**How many members of your household are covered by these plans?**

Skip instructions: Goto S14C\_END

**ACA Exchange Questions:**

1. Have you heard of DC Health Link, Maryland Health Connection, or Healthcare.gov?
  - (if “Yes”) What are they for?
  - (if “No”) Have you heard of Affordable Care Act or Obamacare health insurance exchanges?
    - o (if “No”) The exchanges are organizations set up to allow people to purchase health insurance. Exchanges provide a set of standardized health care plans from which individuals may purchase health insurance eligible for federal subsidies.
2. Have you purchased health insurance through any of these groups or websites?
3. These health insurance exchanges have different categories of plans, different levels. Can you tell me what those levels are?
  - (if “No”) [Show list of alternatives] Which of these is the correct names for the categories?
    - o Bronze, Silver, Gold, Platinum, Catastrophic
    - o Good, Better, Best, Premium, Emergency
    - o Individual, Family, Business, Emergency, Out-of-Pocket
4. “Bronze, Silver, Gold, Platinum, Catastrophic” are the names of the levels. Can you tell me what those levels mean?
5. Please describe what a “Catastrophic” plan is.

4. Add question to screen out non-deeded timeshare properties

**Is this a time-sharing arrangement where you or any member of your household has use of the property only for a specified length of time each year?**

1. Yes  
2. No

**Is this a deeded or right-to-use timeshare?**

1. Deeded

## 2. Right-to-use

### H DEEDED (help screen for DEEDED):

#### Deeded timeshares

- Use of the resort is usually sold into fractional ownership.
- The ownership of the property does not expire
- The owner is liable for his portion of real estate taxes, which are usually collected with the maintenance fees.

#### Right-to-use timeshares

- When the contract ends, all rights return to the property owner.
- Often called a “club membership” or right to use the reservation system.
- Rights to use the property expire after a certain number of years, typically 15-30 years.

1. For this question, we need to know whether a set of instructions for the interviewer makes sense. Sometimes, respondents don't use the same terms that we do and when they answer a question, the interviewer must figure out what it all means. On this sheet of paper, there is an interview question and below that is some information for you to use in answering that question. First is information about an imaginary timeshare. Then are 'help' instructions that you can look at if you need help answering the question. Once you choose your answer, mark it on the sheet and let me know.
  - o Hand to the respondent a pencil and the question paper
  - o Scenario Information:
    - You have a time-sharing arrangement.
    - You pay maintenance fees once per year.
    - You report the timeshare on your taxes.
    - You get points that you can use toward stays at other vacation destinations.
    - The property was owned by your parents and passed on to you 20 years ago.
  - o If they hesitate, instruct them to use the help information also included on the question sheet. The goal is to see if they can classify your response into deeded or right-to-use.
2. How did you go about answering this question? What information did you use?
3. What kind of information would have been helpful for answering this question?

5. Reword total owed for property after last payment question, inputting month names as necessary
6. Reword loan question to "Line of credit home equity loans"

### In-Lab Screener Questions

#### **Do you own your home?**

1. Yes
2. No

#### **Do you have a home equity line of credit?**

1. Yes
2. No

(if “No” Then) Give participant scenario

**Please read this scenario and I will ask you a couple questions about it.**

Two years ago, you took out a home equity line of credit on your home for \$30,000 to do some remodeling. You have been paying the loan back at \$500 per month. The last time you checked in [THE REFERENCE MONTH] you still owed \$18,000. You paid the \$500 toward the loan in [THE REFERENCE MONTH] and [TWO MONTH] but did not make a payment in [LAST MONTH].

(if "Yes" Then) PAIDLOAN

**I'd like to ask you some questions about you and your household's home equity line of credit.**

**Since the first of [THE REFERENCE MONTH], have/has you or your household made any payments for your/your household's loan?**

1. Yes
2. No

PDAMTX1

**What was the total amount paid in [THE REFERENCE MONTH]? \_\_\_\_\_**

PDAMTX2

**What was the total amount paid in [TWO MONTH]? \_\_\_\_\_**

PDAMTX3

**What was the total amount paid in [LAST MONTH]? \_\_\_\_\_**

TOTOWED

**^TOTOWED\_FILL**

IF PAIDLOAN= 2, DK, RF, fill "**How much was owed at the end of [LAST MONTH]?"**

ELSEIF PDAMTX3 ne 0, fill "**How much was owed at the end of [TWO MONTH] before the payment made in [LAST MONTH]?"**

ELSEIF PDAMTX2 ne 0, fill "**How much was owed at the end of [THE REFERENCE MONTH] before the payment made in [TWO MONTH]?"**

ELSEIF PDAMTX1 ne 0, fill, "**How much was owed at the end of [PRE - REFERENCE MONTH] before the payment made in [THE REFERENCE MONTH]?"**

1. (if "Homeowner" and "No Line of Credit") Have you ever taken out a home equity line of credit?
2. Could you please describe what a "home equity line of credit" is?
3. I've heard the terms "home equity line of credit" and "line of credit home equity loan" used interchangeably. Which do you use?

7. Change vacation home property question to include "not rented out"

**Do you own this home?**

1. Yes
2. No

- (IF "NO") – For this question, I want you to imagine that you own a property. The property was empty for a while but a new renter signed a contract for December 1<sup>st</sup> and moved in on January 1<sup>st</sup>.

**Since the first [THE REFERENCE MONTH], how much time did you occupy this timeshare/property?**

\* Enter quantity and select period (Days Weeks Months Percent Other)

**Since the first of [THE REFERENCE MONTH], was this property either rented by someone outside your household or available to be rented?**

1. Yes
2. No

**Since the first of [THE REFERENCE MONTH], how much time was this property rented by someone outside your household?**

\* Enter quantity and select period (Days Weeks Months Percent Other)

**Since the first of [THE REFERENCE MONTH], how much time was this property available to be rented, but not rented out?**

\* Enter quantity and select period (Days Weeks Months Percent Other)

- Ask preceding question about home ownership status; provide additional instruction if necessary.
- Ask remaining questions including the target question.
  1. Please rephrase this last question in your own words.
  2. How would you go about answering this question? What sort of information would you use?
  3. What does 'rented out' mean to you? [probe to understand whether include non-paying guests]
  4. IF OWN HOME – Can you tell me the exact dates that the property was available to be rented? [draw out a calendar or other device to probe calculation strategy]

8. Remove "for non-business use" from computer software expense question

**Have you or any members of your household purchased or rented any --**

1. GPS devices, calculators, and fax machines
2. Digital book readers or tablets
3. Computers, computer systems, or related hardware
4. Computer software, including computer games

**What did you purchase or rent? \_\_\_\_\_**

**Was this item**

1. Purchased for someone inside the household?
2. Rented?
3. Purchased for someone outside the household?

**When did you purchase it? \_\_\_\_\_**

**What did it cost? (Include delivery charges, exclude installation charges.) \_\_\_\_\_**

**What was the total rental expense since the first of the reference month not including the current month? \_\_\_\_\_**

**Was this purchase combined with any other expense? \_\_\_\_\_**

1. Can you name 5 examples of the types of computer software that you think should



- definitely be included?
2. Take a look at this list – what on this list should definitely be included? Definitely excluded?
  3. IF REPORTS – Do you plan to deduct any of the expenses you told me about as business expenses? [probe to match up with their business screener response]

Examples List

TurboTax Personal used for everyone in your household	Microsoft Office used for work and home	Monthly access to professional software online
Call of Duty game you purchased for a friend	QuickBooks for small businesses	Anti-virus software for the laptop used for work and home

9. Delete “Room-size” from rugs or other non-permanent floor coverings question

**Since the first of [THE REFERENCE MONTH], have you or any member of your household purchased any -**  
 - Read each item on list  
**26. Rugs or other non-permanent floor coverings, including carpet squares?**  
 1. Yes  
 2. No

**What did you purchase?** \_\_\_\_\_

**What did it cost?** \_\_\_\_\_

- Earlier, I asked you if you purchased “Rugs or other non-permanent floor coverings, including carpet squares?” How would you define the word “rug?”
- How large is a typical rug?
- Is there a maximum size where you would no longer think of it as a rug, but something else?
- What are some examples of “other non-permanent floor coverings?”

10. Modify wording of tire repair expense question to exclude new tire purchase

**I will now ask about expenses for vehicle services, parts, and equipment. Please do not include expenses for vehicles used entirely for business.**

**Since the first of [THE REFERENCE MONTH], have you or any members of your household had expenses for any of the following?**  
 \* Read each item on list  
 1. Oil change, lubrication, or oil filter  
 2. Motor tune-up  
 3. Battery purchases or installation  
**4. Tire purchases or mounting**  
**5. Tire repair**

**What was the expense for?** \_\_\_\_\_

**Did this expense include labor?**  
 1. Yes

2. No

**In what month did you have this expense? \_\_\_\_\_**

**What was the total cost? \_\_\_\_\_**

**Was this expense combined with any other expenses? \_\_\_\_\_**

1. Can you name 5 examples of things that should definitely be included in 'tire purchases or mounting'?
2. Can you name 5 examples of things that should definitely be included in 'tire repair'?
3. IF ERROR – can you tell me a bit more about that? [probe to understand why they made the error]
4. We are deciding between a few different names for these categories – and we'd like your help to decide which is best. Which do you think works best – 'tire purchases or mounting' or 'new or used tires or mounting'? And which – 'tire repair' or 'patches, plugs, or other repairs for flat tires'?
5. Have you ever purchased or repaired a tire? [probe to understand their familiarity with tires]

11. Reword "food and beverages for catered affairs" to "catering"

**Now I am going to ask about miscellaneous expenses which have not been collected anywhere else in this survey. Please remember to include any payments you made online or had automatically deducted. Also, please include any shipping and handling charges with the cost of any item that was shipped.**

**Since the first of [THE REFERENCE MONTH], have you or any members of your household had expenses for any of the following, either for you or any members of your household or for someone outside your household?**

13. Sewing, knitting, or quilting materials and items?
14. Purchase of pets, pet supplies, or medicine for pets?
15. Pet services
16. Veterinarian expenses for pets
20. Catering?

**What was the expense for? \_\_\_\_\_**

**In what month did you have this expense? (can be same for every month) \_\_\_\_\_**

**Was this expense for someone inside or outside your household? \_\_\_\_\_**

1. What does the term 'catering' mean to you?
2. Can you name 5 examples of events that people might get catering for?
3. Can you name 5 examples of things that should definitely be included in 'catering'?
4. IF ERROR – can you tell me a bit more about that? [probe to understand why made the error]
5. We provide this list [Show Infobook List] to show respondents what we mean when we ask about 'catering'. Does this list remind you of any expenses that your household had that you haven't already told me about?
6. Here's another list of examples of things related to catering [examples list]. Take a look at

this list and mark which ones you think should definitely be included and which should definitely be excluded.

Infobook List:

**Catering, including –**

Bridal showers	Weddings	Parties	Graduations
Bar/Bat Mitzvahs	Anniversaries	Quinceaneras	Confirmations

Examples list

Appetizers	Waiters to serve food	Alcohol	Ice
License for serving alcohol at an event	Rental of chairs	Venue Rental fees	Canned sodas

**Remove Question**

12. Remove ALCOHOL screener from alcohol questions

(ALCOHOL – Question To be Removed) **Since the first of [THE REFERENCE MONTH] have you or any members of your household purchased alcohol, including beer and wine?**

1. Yes
2. No

**What has been you or your household's usual MONTHLY expense for alcohol, including beer and wine to be served at home? \_\_\_\_\_**

1. Earlier, I asked you the question “What has been your or your household's usual MONTHLY expense for alcohol, including beer and wine to be served at home?” Could you tell me what that question is asking, in your own words?
2. Another question we often ask is “Since the first of the reference month have you or any members of your household purchased alcohol, including beer and wine?” Can you tell me what this question is asking, in your own words?
3. I asked about your “usual monthly expense for alcohol.” What does “usual” mean in this question?
4. How did you go about answering this questions?
5. If you don’t mind me asking, what types of alcohol do you/members of your household usually drink?
6. Did you include alcohol purchases made by other members of your household?
7. Did you include drinks purchased at bars, restaurants, concerts, sporting events, places like that? Why or why not?
  - o (If “no”) If you did include them, how would that change your answer?

**Modifications to the CE Information Booklet**

13. Update Infobook examples for sport or recreational equipment repairs

**Since the first of [THE REFERENCE MONTH], did you or any members of your household have any expenses for service contracts, maintenance, or repairs for –**

9. Sport or recreational equipment

**What did the service contract or repair cover? \_\_\_\_\_**

**What was the total cost? \_\_\_\_\_**

<u>Infobook List:</u>	
<b>Sport or recreational equipment</b>	
bicycle repair	outdoor sports equipment repairs
golf club or gun repair	exercise equipment repairs
1. I asked you about “sport and recreational equipment repairs.” Please give me some examples of sports equipment that may need to be repaired. 2. [Show Infobook List] Is there anything that should be included in this list? 3. Does looking at the list remind you of any sports equipment repairs you’ve had done since the beginning of [THE REFERENCE MONTH]?	

14. Modify Infobook examples for fees for participating in sports by removing 'golf' and adding other examples

<p><b>Since the first of [THE REFERENCE MONTH] have you or any member of your household had any membership costs or other expenses related to any of the following?</b></p> <ol style="list-style-type: none"> <li>1. Golf courses or country clubs</li> <li>2. Health clubs, fitness centers, swimming pools, weight loss centers, or other sports and recreational organizations</li> <li>3. Fees for participating in sports such as bowling, biking, hockey, football, or swimming</li> </ol> <p><b>What was the total amount of this expense? / What is your monthly expense? _____</b></p> <p><u>Infobook List:</u></p> <p><b>Fees for participating in sports such as bowling, biking, hockey, football, or swimming, including –</b></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 25%;">tennis</td> <td style="width: 25%;">club sports</td> <td style="width: 25%;">bowling</td> <td style="width: 25%;">hunting and fishing licenses</td> </tr> <tr> <td>billiards</td> <td>swimming</td> <td>biking</td> <td>hockey</td> </tr> <tr> <td>running races</td> <td>triathlons</td> <td>youth sports</td> <td>basketball</td> </tr> <tr> <td>baseball</td> <td>gymnastics</td> <td></td> <td></td> </tr> </table> <ol style="list-style-type: none"> <li>1. I asked you about “fees for participating in sports.” What are some examples of sports where someone might have to pay a fee?</li> <li>2. Do you participate in any sports that require a fee? <ul style="list-style-type: none"> <li>• (if “Yes”) What sports are those?</li> </ul> </li> <li>3. Do you have children that participate in sports? <ul style="list-style-type: none"> <li>• (if “Yes”) Are there any fees associated with those sports?</li> </ul> </li> <li>4. [Show Infobook List] Looking at this list, are there any items that definitely don’t belong? Why does it not belong? What category would you put that item in?</li> <li>5. Is there anything that should be included in this list?</li> <li>6. Does looking at the list remind you of any fees that you’ve paid since the beginning of [THE REFERENCE MONTH]?</li> <li>7. Do you golf? <ul style="list-style-type: none"> <li>• (if “Yes”) [Show List of Item Codes] Where would you put expenses for driving ranges? <ol style="list-style-type: none"> <li>1. Golf courses or country clubs</li> <li>2. Health clubs, fitness centers, swimming pools, weight loss centers, or other sports and recreational organizations</li> <li>3. Fees for participating in sports such as bowling, biking, hockey, football, or swimming</li> </ol> </li> </ul> </li> </ol>				tennis	club sports	bowling	hunting and fishing licenses	billiards	swimming	biking	hockey	running races	triathlons	youth sports	basketball	baseball	gymnastics		
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15. Update Infobook examples for dental care

**Now I am going to ask some questions about medical payments and reimbursements. I will begin with your payments.**

**By payments I mean any co-pays and out-of-pocket expenses. Include all payments, even those for persons who are outside of your household.**

**Since the first of [THE REFERENCE MONTH], have you or any members of your household made any payments for the following?**

\* Read each item on list

1. Eye examinations, treatment, or surgery
2. Purchase of eye glasses or contact lenses
3. Dental care
- ...

**Describe the care/service/item.**

**Was this a purchase or rental?**

**Was/were the care/service/item for a member of your household or someone outside of your household?**

**In what month was(were) the payment(s) made? (can be the same amount each month)**

**What was the total amount paid in the above month?/ What is your monthly expense?**

**Was this expense combined with any other expenses?**

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1. Thinking about dental care generally, what are some examples of dental care that you think should definitely be included?
2. What are some examples of things you think should definitely be excluded?
3. Take a look at this list [Show Infobook List] - what about these?
4. What does 'professional teeth whitening' mean to you? [probe to understand whether they include at-home kits]
5. We want this list to remind respondents of all kinds of dental care. Are there any kinds of dental care that you can think of that are not listed here, that we ought to include?

Infobook List:  
Dental care, such as -

cleanings	root canals
dentures	X-rays
bridges	fillings
braces/invisalign	professional whitening
caps or crowns	cosmetic dentistry

16. Modify the Infobook examples for travel items including luggage

17. Add examples to closet storage items in Infobook.

**Since the first of [THE REFERENCE MONTH], have you or any members of your**

**household purchased for you or your household or for someone outside of your household any -**

15. Lamps, lighting fixtures, or ceiling fans?
16. Other household decorative items
17. Closet storage items?
18. Travel items including luggage?

**What did you purchase?** \_\_\_\_\_

**What was the purchase price?** \_\_\_\_\_

Infobook Lists:

**Closet Storage items, including -**

garment bag	underbed storage	hanging bags	garment racks
shoe bag	hampers	drawers	shelf organizers
shoe rack	drawer organizers	hangers	

**Travel items including luggage, also including –**

travel garment bags	briefcases	backpack
trunk	messenger bag	tote bag

**Closet Storage Items:**

1. I asked you about “closet storage items.” Please give me 5 examples of closet storage items.
2. [Show Infobook List] Looking at this list, are there any items that definitely don’t belong? Why does it not belong? What category would you put that item in?
3. Is there anything that should be included in this list?
4. Does looking at the list remind you of any purchases that you’ve made since the beginning of [THE REFERENCE MONTH]?
5. When was the last time you purchased any closet storage items? What did you purchase?

**Travel items including luggage:**

1. I asked you about “travel items including luggage.” Please give me 5 examples of travel items.
2. [Show Infobook List] Looking at this list, are there any items that definitely don’t belong? Why does it not belong? What category would you put that item in?
3. Is there anything that should be included in this list?
4. Does looking at the list remind you of any purchases that you’ve made since the beginning of [THE REFERENCE MONTH]?
5. When was the last time you purchased any travel items? What did you purchase?

18. Add examples to water sports equipment in Infobook

**Since the first of [THE REFERENCE MONTH], have you or any members of your household purchased or rented any of the following items?**

27. General sports equipment (exclude athletic shoes for sports related use, such as football, baseball, soccer or bowling)
28. Health and exercise equipment
30. Hunting and fishing equipment, including all guns
32. Water sports equipment
33. Outboard motors

**What did you purchase or rent? \_\_\_\_\_**

**Was this item**

1. Purchased for someone inside the household?
2. [Rented?/BLANK]
3. Purchased for someone outside the household?

**What did it cost? \_\_\_\_\_**

Infobook List:

**Water sports equipment, including –**

water skis	snorkel	surf board	diving equipment
life jacket	water ski vest	raft	wake board
wind/paddle board	surf board	boogie board	skim board

1. I asked you about “water sports equipment.” What are some examples of water sports?
2. Please give me 5 examples of water sports equipment.
3. [Show Infobook List] Looking at this list, are there any items that definitely don’t belong? Why does it not belong? What category would you put that item in?
4. Is there anything that should be included in this list?
5. Does looking at the list remind you of any purchases that you’ve made since the beginning of [THE REFERENCE MONTH]?
6. Do you boat, ski, surf, or participate in any other water sports?
  - o (if “Yes”) What equipment do you own?

19. Modify Infobook examples for clothing accessories by changing “purse” to “hand bag”
20. Modify the Infobook examples for costumes
21. Modify the Infobook examples for uniforms
22. Update Infobook examples for coats, jackets, or furs

**Now I am going to ask about clothing and footwear, for infants, children, and adults. Please include any shipping and handling charges with the cost of any item that was shipped.**

**Since the first of [THE REFERENCE MONTH], have you or has any member of your household purchased any of the following items, either for members of your household or for someone outside your household?**

1. Coats, jackets or furs
2. Sport coats or tailored jackets
3. Suits
4. Vests
5. Shirts, sweaters, blouses, or tops
6. Pants, jeans, or shorts
7. Dresses
8. Skirts
9. Undergarments
10. Hosiery
11. Nightwear or loungewear
12. Accessories

13. Swimsuits or warm-up or ski suits
14. Uniforms, for which the cost is not reimbursed
15. Costumes

*Mention all categories; only ask for detail for bolded categories of interest.*

**What did you buy?** \_\_\_\_\_

**For whom was it purchased?** (name) \_\_\_\_\_

**For whom was this purchased?**

1. Male 16 and over
2. Female 16 and over
3. Male 2-15
4. Female 2-15
5. Children under 2 years old

**When did you purchase it?** (can be same amount each month) \_\_\_\_\_

**What is your monthly expense/How much did it cost?** \_\_\_\_\_

**Was this purchase combined with anything else?** \_\_\_\_\_

**Coats, jackets, or furs**

1. Can you name 5 examples of items that you think we are interested in for this question?
2. We provide this list [Show Infobook List] to show respondents what we mean when we ask about ‘coats, jackets, or furs’. How does this description compare to the kinds of items you had originally thought about? Does the list remind you of any expenses your household had that you haven’t already told me about?
3. Now, take a look at this list [Examples List] and mark which ones you think should definitely be included and which should definitely be excluded.

Infobook List:

Coats, jackets, or furs, including -  
     shawl/stole  
     raincoat  
     down vest

List of examples Coats Jackets or Furs:

Fur gloves	Windbreaker	Blazer
Fur coat	Sweater vest	Winter coat
Sports coat	Scarf	Hoodie

**Accessories**

1. Can you name 5 examples of items that you think we are interested in for this question?
2. We provide this list [Show Infobook List] to show respondents what we mean when we ask about ‘accessories’. Does this list remind you of any expenses that your household has had that you haven’t already told me about?
3. Which of these items [Show Accessories Picture Array] pictured do you think should definitely be included? Which should definitely be excluded? [probe if they exclude



‘purses’]

4. Take another look at these pictures. Did you or anyone in your household have any expenses for items like these?
5. And what would you call an item that looked like this? [point to purse] and this? [handbag] [probe to understand if they distinguish between purses and handbags in a meaningful way]

**Infobook List:**

Accessories, including -

umbrellas	hand bag	fold-up rain accessories
belts	wallet	bandannas
ties	apron	hair accessories
scarves	ear muffs	non-prescription
gloves	handkerchiefs	sunglasses
mittens	bridal headpiece	

**Uniforms**

1. Can you name 5 examples of items that you think we are interested in for this question?
2. What does ‘for which the cost is not reimbursed’ mean to you?
3. We provide this list [Show Infobook List] to show respondents what we mean when we ask about ‘uniforms, for which the cost is not reimbursed’. Does this list remind you of any expenses that your household has had that you haven’t already told me about?
4. Which of these items [Examples List] do you think should definitely be included? Which should definitely be excluded?

**Infobook List:**

Uniforms, other than sport, for which the cost is not reimbursed, including -

school uniforms	barber smocks
scout uniforms	lab smocks
work uniforms	military uniforms
medical scrubs	

**List of examples Uniforms:**

Polo shirt in school colors	Khaki pants that you bought for yourself but can also be worn at work	School football team jersey
Mechanic’s jumpsuit	Socks with school logo	Waiter’s apparel
Boy scout outfit	Black shirt and pants worn for work	Doctor’s white coat provided by the hospital

**Costumes**

1. Can you name 5 examples of ‘costumes’ that you think should definitely be included?
2. We provide this list [Show Infobook List] to show respondents what we mean when we ask about ‘costumes’. Does this list remind you of any expenses that your household had that you haven’t already told me about?
3. Take a look at these pictures [Show Costumes Picture Array]. Which items do you think should definitely be included? Which should be definitely excluded? [probe to understand whether they include ‘practice’ outfits (like ballet leotards)]
4. IF ERROR – What would you call this group of items? What words would you use?

Infobook List:

Costumes, including -  
    dance  
    ballet performances  
    Halloween

Costumes Picture Array



Accessories Picture Array



