

Appendix A: Questions to be Tested

Item Categories and Initial Wording for Testing

This is a list of the main ways the categories are asked about. These letters are used in the cells of the table starting on the next page; the text for each letter A, B, C, D, E, F, or G leads into the question wording.

A (purchased)

Since the first of [the reference month], have you or any members of your household purchased ...

B (purchased or rented)

Since the first of [the reference month], have you or any members of your household purchased or rented ... [for your household or for someone outside of your household]

C (purchased, for own household or someone outside of household)

Since the first of [the reference month], have you or any members of your household purchased, either for members of your household or for someone outside your household, ...

D (had expenses for)

Since the first of [the reference month], have you or any members of your household had expenses for...

E (had expenses, either for own household or someone outside of household)

Since the first of [the reference month], have you or any members of your household had expenses, either for you or any members of your household or for someone outside your household, for... (note this is very long and awkward but corresponds to the wording in the CEQ that introduces a list of items: *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?*)

F (Trips -- spend anything)

How much did you or any members of your household spend for ... other than what the package deal covered?

[for all costs except for transportation]: What costs, including taxes, won't be reimbursed?

G (To be determined/Does not fit well into previous wording categories)

The following table shows, in Item Category order:

- Item Category Number
- Cluster Number
- Item Category Name
- Question Wording for testing

Cat #	Cluster #	Item Category	Question Wording (after intro text)
1	1	Apparel	C ...Any suits for men, women, or children?
			C ...Any sportcoats or tailored jackets for men, women, or children?
			C ...Any uniforms or costumes for men, women, and children?
			C ...Any type of dresses, for women or girls?
6	1	Jewelry and watches	C ...Any jewelry, watches or parts for watches?
11	6	Child care	D ...Any child care services inside or outside the home?
14	7	Internet services	D ...Internet services away from home, such as internet cafes, and WiFi access fees in hotels, airports, and planes?
15	7	Information and information processing other than internet services	B ... GPS devices, aside from those on cell phones or built into cars?
			B ...Laptops and desktop computers, and computer equipment that you use with the computer?
			D ...Any expenses for installations, repairs, or service contracts for a personal-use computer?
			B ...Any portable memory storage for computers and other electronic devices?
			B ...Digital book readers or tablets?
			B ...Cell or landline phones and accessories? Do NOT include phone service fees.
			B ... Office devices for non-business use, such as calculators, fax machines, and paper shredders?
37	6	School meals	D ...any meals at school for preschool through high school age children?
38	8	Catered affairs	E ...Any expenses for catered events, including rentals and purchases?
39	4	Food on out-of-town trips	F ...meals, snacks, or NON-alcoholic beverages at restaurants, bars, or fast food places not counting what the package deal covered?
40	4	Food prepared by CU on out-of-town trips	F ...food or NON-alcoholic beverages at grocery or convenience stores on this trip?
43	4	Beer, wine and other alcoholic beverages away from home	F... Did you purchase any alcoholic beverages on this trip?
48	8	Funeral expenses	E ...Any expenses related to a death or maintenance of cemetery plots or vaults?
49	1	Other apparel services	E ...Any expenses for rental, storage, or repair of clothing, watches, and jewelry?
51	6	Miscellaneous personal goods	C...Any other infant equipment?
			C ...Any luggage, briefcases, or gym or tote bags?

Cat #	Cluster #	Item Category	Question Wording (after intro text)
54	4	Lodging away from home	F ...Lodging, not counting what the package deal covered? Do not include expenses previously reported for vacation clubs.
62	2	Floor coverings	D...Flooring installation, repair, or replacement including wood, vinyl, tile, and wall-to-wall carpeting?
63	3	Household textiles	C ...Any bathroom linens, shower curtains, and bath mats?
			C ...Any bed linens, blankets, and pillows, for both adults and children?
			C ...Any kitchen, dining room, or any other room's linens and fabric materials?
			C ...Any window coverings, including curtains, drapes, blinds, and shades?
			C ...Any slipcovers, decorative pillows or cushions?
			C ...Any coverings for floors and stairs that are not permanent?
65	3	Unpriced maintenance and repair services	D... service contracts, maintenance, or repairs for other household appliances, such as washer, refrigerator, or range/oven?
			D...repairing, refinishing or reupholstering furniture, including the cost for fabric?
			D... service contracts, maintenance, or repairs for garbage disposal, range hood, or built-in dishwasher?
66	3	Furniture	C ...Any living, family, or recreation room furniture?
			C ... Any office furniture for home use, including filing and storage equipment?
			C ...Any patio, porch, or outdoor furniture and covers?
			C ...Any Infant furniture that is not transportable?
			C ... Any dining room or kitchen furniture?
			C ... Any other furniture not already mentioned, for any other areas in the house?
			C ... Any bedroom furniture, including mattress and springs?
			G...Since the first of the reference month, have you or any members of your household rented or leased any furniture?
67	3	Appliances	B ...Any larger appliances for the kitchen or laundry room, excluding dishwashers?
			B ... Any small electric kitchen appliances?
			B ...Any dishwasher that is portable, not built-in?
			B ...Any window or wall unit air conditioners?
			B ...1. Any air purifiers, water filters, carbon monoxide detectors, or smoke alarms? B ...2. Any burglar alarm equipment, paid for separately from regular security alarm service fees?

Cat #	Cluster #	Item Category	Question Wording (after intro text)
			B ... Any electric floor and carpet cleaning equipment?
			B ...Any portable cooling or heating equipment?
68	3	Other household equipment	C ...Any indoor lamps, ceiling or wall lighting, or ceiling fans?
			C ...Any other household decorative items such as clocks, art, mirrors, and seasonal decorations?
			C ...any items used to serve, consume, and store food and drink?
			C ... Any nonelectric cookware?
			C ... Any potted plants, fresh cut flowers, or flowers that can be worn or carried?
69	3	Tools, hardware, outdoor equipment and supplies	B ...Any yard equipment and tools that are motorized, electric, or manual?
			B ... Any items used for hanging or storage in the closet?
			A ...Any termite or pest control treatment? Do NOT include professional service fees
71	2	Household operations	C ... Any housekeeping, lawn, or tree care services? Do not include services covered by management or maintenance fees.
			D ...for service contracts, maintenance, or repairs for any lawn or garden equipment?
			D ...Any termite or pest control professional service fees?
81	7	Video and audio	B ... Television sets, all types including those installed in vehicles? Include charges for installation or set-up.
			B...DVD and Blu-Ray players, DVRs, TV converter boxes, or video cameras?
			B ... Stereos, radios, speakers, and sound components, including those installed in vehicles? Include charges for installation or set-up.
			B ...Any small personal music players?
			B... Other sound or video equipment, including accessories?
			B ...Any satellite dishes, receivers, or accessories, paid for separately from regular satellite service fees? Include charges for installation or set-up.
			D ...Any expenses for service contracts, maintenance, or repairs for any audio or video electronic equipment or devices?
			Since the first of [the reference month], have you or any members of your household rented any video hardware?
			B...Any video game systems or accessories? Do NOT include actual video games.
82	5	Pets, pet products and services	C ...Purchase of pets and their supplies, medical care, and other pet services?

Cat #	Cluster #	Item Category	Question Wording (after intro text)
83	5	Sporting goods	B ...1. Any sports and recreation goods or equipment? B ...2. Any ping pong, pool tables, or other similar recreation room items?
			B ... Any health and exercise equipment?
			B ...Any bicycles, including parts and equipment, both what you wear and use?
			B ...Any equipment used for camping, hunting, and fishing? Include guns.
			B...Winter sports equipment, including both what you wear and use?
			B...Water sports equipment, including both what you wear and use?
			B ...Any other sports or recreation equipment, including repairs?
			B ...Any playground equipment, sand boxes, or inflatable pools?
84	5	Boats, RV's, and other recreational vehicles	F ...Docking and landing fees for boats and planes?
			B...Any outboard motors?
			F ...How much did you or any members of your household spend for any rented vehicles for recreational use, other than what the package deal covered?
86	5	Photography	E...Any professional photography services or products?
			E...Any photographic equipment, supplies, or processing?
87	5	Other recreational goods	B ...Any musical instruments, including repairs?
			B...Any stamp or coin collecting?
			A...Any souvenirs or memorabilia?
			B...Any toys, games, and arts and crafts kits? Do not include electronic games.
88	5	Sewing	B ...Any sewing machines, or sewing, knitting, or quilting materials and items?
89	5	Recreation services	F...Did you or any member of your household pay any fees to play sports, exercise, or rent any sports equipment not counting what the package deal covered?
			F...Entertainment or admissions
			E ...1. Any membership at golf courses, country clubs, health and fitness centers, or pools? E ...2. Any membership in any other social, civic, fraternal, or service clubs, such as Boy Scouts, Kiwanis, AARP, fraternities, and honor societies?
			D...Any recreational or instructional classes or lessons?
			D ...Any fees for participating in sports such as golf, bowling, biking, hockey, football, or swimming?
			D ...Any in-person or online dating services, such as

Cat #	Cluster #	Item Category	Question Wording (after intro text)
			matchmaking, eHarmony, Match.com, and speed dating?
			D...Instructional day camps or overnight camps?
			D... Vacation clubs or timeshares dues?
			D ...Any shopping club memberships, including warehouse clubs like Sam's Club and discount memberships like Amazon Prime?
90	5	Movie, theater, sporting event, and other admissions	F... Did you or any members of your household spend money for: 1. Tour fees, admission fees, or tickets? 2. Other entertainment? ...not counting what the package deal covered? How much did you or any members of your household spend? / What costs for entertainment and admissions won't be reimbursed?
95	4	Leased and rented vehicles	G...How much did you or any members of your household spend on rental vehicles for getting around, not including fuel, other than what the package deal covered? Do not include any rental costs already collected.
101, 102	4	Motor fuel; Motor vehicle parts and equipment	G...While on the trip did you or any members of your household stop to buy any gasoline, diesel fuel, or any other fuels?
105	4	Motor vehicle fees	G...While on the trip did you or any members of your household have any parking fees? Do not include parking fees you were reimbursed for. G...While on the trip, did you or any members of your household have any tolls not already reported? Do not include tolls you were reimbursed for. G...Local tolls or electronic toll passes? G...Automobile service clubs such as AAA or services such as OnStar or LoJack?
107	4	Airline fares	F...How much did you or any members of your household spend on airfare, including baggage and change fees, other than what the package deal covered?
108	4	Other public transportation	F...How much did you or any members of your household spend for local transportation, such as shuttles, taxis, buses, subways or trains, and ferries? Do not include costs covered by your package deal. F...How much did you or any members of your household spend on bus or train fare to reach your destination, other than what the package deal covered? F...How much did you or any members of your household spend on cruise ship tickets other than what the package deal covers? Do not include incidental charges. G... How much did you or any members of your household spend on mass transportation services such as a bus, subway, mini-bus, or train? Include all commuter and carpool services. Do not include expenses covered by employer-

Cat #	Cluster #	Item Category	Question Wording (after intro text)
			provided transit subsidies.

Appendix B: Cognitive Testing Protocol

1. Introduction

Thank you for taking the time to help us out today. My name is [and this is my colleague () who will be taking notes for us today. We also have () from the Bureau of Labor Statistics who is observing the session.]

2. Purpose and Consent Procedure

First, I'll give you a little background about what we'll be doing. Westat is working on this project for the Bureau of Labor Statistics (BLS).

I will be asking you a series of questions from the Consumer Expenditure Survey, an ongoing survey that BLS conducts. The survey 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.

I'll be asking you to answer the questions and share 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 each question is asking about, and how hard it is to answer. We are not evaluating you, we are looking to improve the questions, so there are no right or wrong answers. All the information you give us will be kept completely confidential, and will be used to improve the survey questions.

Please read this consent form, and I'll answer any questions you may have. [ANSWER QUESTIONS, IF ANY.] Please sign the form.

[START RECORDER AND GET ORAL PERMISSION TO RECORD; WHICH RECRUITER EXPLAINED AT TIME OF SCHEDULING CALL.] With your permission, I would like to record the interview so that I have an accurate account of what you say in case I miss anything while taking notes. Do you give your permission to participate in this interview and to be recorded?

Do you have any [other] questions before we begin?

[INTERVIEWER: GO THROUGH THE FOLLOWING SECTIONS 3 – 6 BASED ON THE CLUSTERS OF EXPENDITURE QUESTIONS DESIGNATED FOR TESTING IN THE PARTICULAR TESTING ROUND]

3. Administration of Expenditure Questions and Follow-ups (to assess reporting accuracy)

- [ASK EVERY EXPENDITURE QUESTION DESIGNATED FOR THAT TESTING ROUND TO DETERMINE APPLICABLE EXPENDITURES]:

Since the first of [the reference month 3 months prior], have you or any members of your household purchased _____?

- [FOR ANY “YES ANSWER”]; ASK:
 - How much did you [and your household] spend on _____ in [the month 3 months prior]?
 - How much did you [and your household] spend on _____ in [the month 2 months prior]?
 - How much did you [and your household] spend on _____ in [the month 1 month prior]?

4. Administration of Follow-up Questions for Applicable Expenditure Questions (to assess reporting accuracy and estimation accuracy)

- [FOR ANY EXPENDITURE QUESTIONS PARTICIPANT DID HAVE EXPENDITURE(S) FOR], ASK:
 - What specific item(s) did you [or others in your household] purchase?
 - What was the cost of each of those items?
 - In what month did you [or others in your household] purchase [that/those] item(s)?
 - Was there anything you thought of, but decided not to report for [expenditure question]? What made you decide not to?

5. Recall Activity (to assess comprehension)

- [FOR ANY EXPENDITURE QUESTIONS THE PARTICIPANT DID NOT REPORT EXPENDITURE(S) FOR], ASK:
 - Have you or anyone in your household ever bought any [expenditure question wording]?
- [FOR ANY EXPENDITURE QUESTIONS PARTICIPANT DID HAVE EXPENDITURE(S) FOR], ASK:
 - Other than what you already mentioned that you bought since [the first of the reference month 3 months prior], what are some other examples of items you or anyone in your household has ever bought that belong with [expenditure question wording]?

- [FOR ALL EXPENDITURE QUESTIONS], ASK:
 - Can you name for me 5 items you think of when you hear [expenditure question wording]?
 - [IF PARTICIPANT NAMES FEWER THAN 5 ITEMS], ASK: What else?
 - [IF PARTICIPANT STILL STOPS SHORT OF 5 ITEMS AND CANNOT NAME MORE, MOVE ON TO THE NEXT QUESTION.]

6. Inclusion/Exclusion Judgment Activity (to assess comprehension) and Recheck of Expenditures (to recheck and assess reporting accuracy and estimation accuracy)

- [FOR ALL EXPENDITURE QUESTIONS], ASK:
 - Please review this list and use an X to mark the column for items that you think belong for [wording of expenditure question], which do not belong, and which you are not sure of.
- [FOR ALL EXPENDITURE QUESTIONS], ASK:
 - Did working with these items [refer to list] remind you of any other items you've purchased since [the first of the reference month 3 months prior] that you [didn't previously mention when you gave costs / think of]?

[FOR ANY EXPENDITURE QUESTION PARTICIPANT SAYS "YES"], ASK:

- What items did you or others in your household purchase?
- What was the cost of that item?
- In what month did you or others in your household purchase that item?
- Can you say why you didn't...
 - [If answered "No" for expenditure questions] ...think of this sooner?

OR

- [If answered "Yes" for expenditure questions] ...include this when you answered about the other items you or others purchased for [expenditure question wording]?

7. Closing

We appreciate your help today. Thank you for your time. [PROVIDE THE \$40 INCENTIVE.]

Appendix C: Item List Example

(“Lures” are marked with shading; lists will be shown with no shading)

Small electric kitchen appliances

Please place an "x" in the column to indicate which items you think belong and do not belong in this category.

	Belongs	Does not belong	Not sure
Bread maker			
Burger cooker			
Cake rack			
Electric corn popper			
Donut maker			
Ice bucket			
Wall oven			
Toaster oven			
Mini food processor			
Freezer			
Electric can opener			
Electric egg poacher			
Spatula			
Hand-held mixer			
Electric frying pan			
Electric juicer			
Gas stove			
Electric skillet			
Chopping board			
Measuring spoons			
Deep fryer			
Rolling pin			
Whisk			
Electric fondue set			
Meat thermometer			
Crockpot			
Dish dryer rack			
Coffee grinder			