KnowledgePanel®

Study Information

Client	US Bureau of Labor Statistics (BLS)
Project Name	Consumer Expenditure Online Diary Project – Household Characteristics Survey
Account Executive	Robert Torongo
Project Manager	Ryan Tully
Ipsos Job Number	20-065842-01
SNO(s)	TBD
LOI	TBD
Type of Study	Ad-hoc, one shot
Field Start Date (tentative is fine)	09/01/2021
Field End Date (tentative is fine)	12/01/2021
Teams Involved	Scripting, DP, Coding
DP Team Scope	Data cleaning, Banner Tables, SPSS dataset
Kickoff Meeting Date (tentative is fine)	09/22/2020
Comments	Please include SamVars: XPPCP0029 XPPPA1636 XPPPA1637

Sample Variables

- KP standard demographics

Main Questionnaire

Programming Notes:
- *Code all refusals as -1.*
- *Use default instruction text for each question type unless otherwise specified.*
- *Do not prompt on all questions. (Remove this instruction if sample is all opt-in, client list sample, or otherwise not KP.)*

Introduction

BASE: MAIN RESPONDENT

INTRODUCTION DISPLAY [D]

Thank you for being part of the Consumer Spending Survey. The U.S. Bureau of Labor Statistics is conducting this study to understand the spending habits of households in the U.S.

Your responses are important to help us understand you and your household's characteristics and typical spending. The survey should take you about 20 minutes to complete and as our thank you for completing this survey, you will receive **2,000 survey points**.

Participating is voluntary and your responses will be kept confidential. If you have comments or suggestions about your participation or this survey, please contact **[INSERT NAME]**, **[INSERT TITLE]**, **[INSERT ORGANIZATION]**, **[INSERT NUMBER]**, **[INSERT E-MAIL ADDRESS]**, **[INSERT ADDRESS]**. Please refer to OMB Control Number **[INSERT NUMBER]**-**[INSERT NUMBER]**, expiration date **[INSERT DATE]**.

Please click the 'Next' button below to proceed to the survey.

Scripting: Please add the following text as a footnote on the screen:

The Bureau of Labor Statistics, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent. Per the Federal Cybersecurity Enhancement Act of 2015, Federal information systems are protected from malicious activities through cybersecurity screening of transmitted data.

The Bureau of Labor Statistics is conducting this voluntary survey in support of the Consumer Price Index (CPI) program. The continuing Consumer Expenditure Surveys provide a constant measurement of changes in consumer expenditure patterns for economic analysis, and obtain data for future CPI revisions.

We expect that the survey will take about 20 minutes to complete; in addition, for the spending diary component of the study, it will take about 10 minutes to record your expenditures daily.

This survey could not be conducted without a valid OMB Control Number. The U.S. Office of Management and Budget has approved this survey and assigned it Control Number xxxx-xxxx.

Household Rostering Questions

BASE: ALL RESPONDENTS; SHOW AS SAME PAGE AS CHILD

ADULT [N, RANGE 1-14; REQUIRED; PROMPT: By providing this information, you help represent the entire U.S. population. Your individual responses are kept confidential. Thank you!**]**

Including yourself, how many people are 18 years of age or older and currently live in your household at least 50% of the time?

Please include unrelated individuals (such as roommates), and those now away traveling or in a hospital. However, please **exclude** those living away at school.

Type in the number of adults 18 years of age or older.

[INSERT NUMERIC BOX; RANGE 1-14]

BASE: ALL RESPONDENTS; SHOW AS SAME PAGE AS ADULT

CHILD [N, RANGE 0-14; REQUIRED; PROMPT: By providing this information, you help represent the entire U.S. population. Your individual responses are kept confidential. Thank you!**]**
Next, how many people are 17 years of age or younger and currently live in your household at least 50% of the time? If none, enter "0".

Include babies and small children.

Type in the number of children 17 years of age or younger.

[INSERT NUMERIC BOX; RANGE 0-14]

Scripting: Please create variable HHSIZE, which should contain the sum total of ADULT + CHILD

BASE: SHOW IF HHSIZE>10

HHSIZECONFIRM [S]
You said that **[INSERT HHSIZE]** people live in your household. Is that correct?

1. Yes
2. No

Scripting: If HHSIZECONFIRM=2, repeat ADULT and CHILD.

BASE: SHOW IF HHSIZE>1

HHCOMP1 [Q/S PROMPT: Your answer to this question is important for future surveys we will send you – your individual responses are kept confidential**]**
Please tell us a little more about the people you share your household with.

For each person in your household **[INSERT IF HHSIZE>14** (up to 14 people)**]**, enter their name, age on their last birthday and indicate if they are male or female. For infants who are less than 1 year old, please enter a 0 for age.

Type in the number for age and select one answer for gender from each row in the grid.

Household members in row:

1. Yourself
2. Member 2
3. Member 3
4. Member 4
5. Member 5
6. Member 6
7. Member 7
8. Member 8
9. Member 9
10. Member 10
11. Member 11

12. Member 12
13. Member 13
14. Member 14

Answers in third column:

1. Male
2. Female

Scripting: Show grid with same number of lines as HHSIZE. First column: heading 'Name' only allow text (Please label the name variables FNAME). Second column: heading "Age" min.=0, max.=120. Third column: heading "Gender", show radio buttons. Populate gender and age for "Yourself" with PPAGE and PPGENDER. Prompt following nonresponse. Show age and gender as placeholder for "Yourself", but do not allow to edit on this screen.

BASE: DATA ONLY VARIABLE

DOV_PERSON [CODE ALL PEOPLE IN THE HOUSEHOLD IN ROSTER]

1. YOU
2. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
3. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
4. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
5. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
6. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
7. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
8. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
9. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
10. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
11. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
12. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
13. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]
14. [INSERT INITIALS/NAME, INSERT AGE YEAR OLD, INSERT SEX]

Scripting: Please create variable PERSONID for each individual in the household

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BASE: SHOW IF HOUSEHOLD HAS MORE THAN 1 PERSON

CU_CODE1 [S; PROMPT; LOOP ON SEPARATE SCREENS FOR EACH PERSON IN THE HOUSEHOLD ROSTER THAT IS NOT DOV_PERSON=1 'YOU']
What is your relationship to **[INSERT PERSON NAME]**? **[INSERT PERSON NAME]** is my…
Relationships include biological, adopted and step.

Select one answer only.

2. Spouse (Husband/Wife) **[SHOW IF PERSON BEING DISPLAYED AGE>13]**
3. Child
4. Grandchild
5. In-Law
6. Brother or Sister
7. Mother or Father **[SHOW IF PERSON BEING DISPLAYED AGE>13]**
8. Other related person (Aunt, Uncle, etc.)
9. Unrelated Person (Lodger, Lodger's spouse, foster child, etc.)
10. Unmarried Partner **[SHOW IF PERSON BEING DISPLAYED AGE>13]**

Scripting: Please autopunch if Person 1 'Reference Person.' Please show household members with oldest individual first through the youngest individual.

BASE: SHOW IF HHSIZE>1 AND AT LEAST ONE OTHER HH MEMBER IS AGE 16 OR OLDER

EDUCA [S; ACCORDION FORMAT; PROMPT; LOOP FOR EACH PERSON IN THE HOUSEHOLD ROSTER THAT IS NOT DOV_PERSON=1 'YOU' AND IS AGE 16 OR OLDER; SHOW EDUCA AND THEN IN_COLL FOR EACH PERSON IN THE LOOP]
What is the highest level of school **[INSERT PERSON NAME]** has completed?

Select one answer only.

1. Some high school or less – no diploma or GED
2. High school graduate – high school diploma or the equivalent (GED)
3. Some college, no degree
4. Associate degree
5. Bachelor's degree
6. Master's degree
7. Professional or Doctorate degree

BASE: SHOW IF PRIMARY RESPONDENT AND PPEDUC=9 THROUGH 14 OR IF NOT PRIMARY RESPONDENT AND EDUCA=2 THROUGH 7
IN_COLL [S; PROMPT; LOOP ON SEPARATE SCREENS FOR EACH PERSON IN THE HOUSEHOLD ROSTER WHERE EDUCA=2 THROUGH 7 INCLUDING DOV_PERSON=1 'YOU']

[INSERT IF DOV_PERSON=1: Are you ; **INSERT IF DOV_PERSON>1:** Is **INSERT PERSON NAME]** currently enrolled in a college or university?

Select one answer only.

1. Yes, enrolled full-time
2. Yes, enrolled part-time
3. No, not enrolled

Household Questions

BASE: ALL RESPONDENTS
BSNS_YN [S]
Are these living quarters used partly for business or rented to others?
1. Yes
2. No

BASE: SHOW IF BSNS_YN=1 'YES'
BSNSTYPE [S]
Is it for business, or rented to others, or both?

Select one answer only.

1. Part Business
2. Rented to others
3. Both business and rented to others

BASE: SHOW IF BSNSTYPE=1 OR 2 OR 3
BUS_EXPN [NUMERIC BOX; RANGE 0-100]]
What percent of the expenses is counted as a business expense?

[INSERT NUMERIC BOX; RANGE 0-100]

BASE: ALL RESPONDENTS

QHOUSE [S]
Which best describes the building where you live?

Select one answer only.

1. One-family house detached from any other house
2. One-family house attached to one or more houses (such as a condo or townhouse)
3. Building with 2 or more apartments
4. Mobile home
5. Boat, RV, van, etc.

BASE: ALL RESPONDENTS

QOWN [S]
Are your living quarters…

Select one answer only.

1. Owned by you or someone in your household with a mortgage or loan
4. Owned by you or someone in your household free and clear (without a mortgage or loan)
2. Rented
3. Occupied without payment of rent

Expenditure Questions

BASE: ALL RESPONDENTS

GROCERYX [NUMERIC BOX; RANGE 0 – 2,000]
Since the first of **[INSERT MONTH THREE MONTHS PRIOR TO START SURVEY]**, what has been
[INSERT IF HHSIZE=1: your ; **INSERT IF HHSIZE>1:** your household's**]** usual WEEKLY expense for
grocery shopping?

Please include grocery home delivery service fees and drinking water delivery fees.

$ **[INSERT NUMERIC BOX; RANGE 0 – 2,000]**

BASE: SHOW IF GROCERYX>0

**NONFOODX [NUMERIC BOX; RANGE 0-800, BUT CANNOT EXCEED AMOUNT ENTERED IN
GROCERYX; IF AMOUNT DOES EXCEED AMOUNT IN GROCERYX; PROMPT** The total amount for non-
food items cannot exceed the total amount for grocery items**]**
About how much of this amount was for nonfood items, such as paper products, detergents, home
cleaning supplies, pet foods, and alcoholic beverages?

$ **[INSERT NUMERIC BOX; RANGE 0-800, BUT CANNOT EXCEED AMOUNT ENTERED IN GROCERYX]**

BASE: ALL RESPONDENTS

OTHFOOD [S]
Other than your regular grocery shopping already reported, **[INSERT IF HHSIZE=1:** have you ;
INSERT IF HHSIZE>1: have you or has anyone in your household**]** purchased any food or
nonalcoholic beverages from places such as grocery stores, convenience stores, specialty stores,
home delivery, or farmer's markets?

1. Yes
2. No

BASE: SHOW IF OTHFOOD=1

OTHFOODX [NUMERIC BOX; RANGE 0-1,200]
What was **[INSERT IF HHSIZE=1:** your ; **INSERT IF HHSIZE>1:** your household's**]** usual WEEKLY expense at these places?

$ **[INSERT NUMERIC BOX; RANGE 0-1,200]**

BASE: SHOW IF AT LEAST ONE HOUSEHOLD MEMBER IS LESS THAN 22 YEARS OF AGE

PURCMEAL [S]
During the previous 30 days, **[INSERT IF HHSIZE=1:** have you ; **INSERT IF HHSIZE>1:** have you or has anyone in your household**]** purchased any meals at school or in a preschool program for preschool or school age children?

1. Yes
2. No

BASE: SHOW IF PURCMEAL=1 'YES'

MEMB_SM [S]
What are the names of all the people from your household who purchased meals at school?

Select all answers that apply.

[INSERT LIST OF HOUSEHOLD MEMBERS AGE 21 AND YOUNGER. FOR PRIMARY RESPONDENT, PLEASE USE WORD 'MYSELF' AT TOP OF RESPONSE OPTIONS]

Scripter: Please autopunch primary household member's name for MEMB_SM if HHSIZE=1 and PURCMEAL=1.

BASE: SHOW IF PURCMEAL=1 'YES'

SCHLNCHX [NUMERIC BOX; RANGE 0-400; LOOP FOR EACH HOUSEHOLD MEMBER SELECTED IN MEMB_SM; SHOW SCHLNCHX AND THEN SCHLNCHQ FOR EACH PERSON IN THE LOOP]
What has been the usual weekly expense for the meals **[INSERT PERSON NAME]** purchased at school?

$ **[INSERT NUMERIC BOX; RANGE 0-400]**

Scripter: SCHLNCHX and SCHLNCHQ should be asked as a loop for each eligible household member prior to proceeding to WKS_WRKD.

BASE: SHOW IF PURCMEAL=1 'YES'

SCHLNCHQ [NUMERIC BOX; RANGE 1-5; LOOP FOR EACH HOUSEHOLD MEMBER SELECTED IN MEMB_SM]
How many weeks in the past 30 days did **[INSERT HOUSEHOLD MEMBER NAME]** purchase meals?

[INSERT NUMERIC BOX; RANGE 1-5] Weeks

Employment & Income Related Questions

Scripting: Please loop questions as instructed starting with WKS_WRKD through IRAX for both primary respondent and any additional household members age 14 or older

BASE: SHOW FOR PRIMARY RESPONDENT AND ALL HOUSEHOLD MEMBERS 14 OR OLDER

WKS_WRKD [N; RANGE 0-52; LOOP FOR ALL HOUSEHOLD MEMBERS AGE 14 OR OLDER]
[SHOW IF NOT PRIMARY RESPONDENT: We now have some questions about **[INSERT PERSON NAME]**'s work experience and income.**]**

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In the past 12 months, including paid vacation and sick leave, how many weeks did **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** work?

If **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** did not work at all during this time, please enter zero.

[INSERT NUMERIC BOX; RANGE 0-52] Weeks

BASE: SHOW IF WKS_WRKD>0 OR -1 'REFUSED'

HRSPERWK [N; RANGE 0-100; LOOP FOR ALL HOUSEHOLD MEMBERS AGE 14 OR OLDER]
In the weeks that **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** worked, how many hours did **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** usually work per week?

[INSERT NUMERIC BOX; RANGE 0-100] Hours per week

BASE: SHOW IF WKS_WRKD>0 OR -1 'REFUSED' AND IS PRIMARY RESPONDENT

OCCULIST [S]
Which of the following categories best describes the job in which you received the most earnings during the last 12 months?

Select one answer only.

1. Administrator, manager
2. Teacher
3. Professional
4. Administrative support, including clerical
5. Sales, retail
6. Sales, business goods and services
7. Technician
8. Protective service
9. Private household service
10. Other service
11. Machine or transportation operator, laborer
12. Construction workers, mechanics
13. Farming
14. Forestry, fishing, groundskeeping
15. Armed Forces

BASE: SHOW IF WKS_WRKD>0 OR -1 'REFUSED' AND IS PRIMARY RESPONDENT

EMPLTYPE [S]
Were you:

Select one answer only.

1. An employee of a PRIVATE company, business, or individual working for wages or salary?
2. A FEDERAL government employee?
3. A STATE government employee?
4. A LOCAL government employee?
5. Self-employed in your own business, partnership, professional practice, or farm?
6. Working WITHOUT PAY in family business or farm?

BASE: SHOW IF WKS_WRKD=0

WHYNOWRK [S; LOOP FOR ALL HOUSEHOLD MEMBERS AGE 14 OR OLDER]
What was the main reason **[INSERT IF PRIMARY RESPONDENT:** you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** did not work during the last 12 months?

[INSERT IF PRIMARY RESPONDENT: Were you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** Was **INSERT PERSON NAME]**

Select one answer only.

1. Retired?
2. Taking care of home/family?
3. Going to school?
4. Ill, disabled, unable to work?
5. Unable to find work?
6. Doing something else?

BASE: SHOW FOR PRIMARY RESPONDENT AND ALL HOUSEHOLD MEMBERS 14 OR OLDER

HAVEWAGE [S; LOOP FOR ALL HOUSEHOLD MEMBERS AGE 14 OR OLDER]
The next few questions are about income DURING THE PAST 12 MONTHS, that is from **[INSERT DATE FROM ONE YEAR AGO FROM CURRENT DATE; USE FORMAT OF MONTH (NAME OF MONTH), DAY (WITH NOT LEADING ZERO), YEAR (YYYY)]** to **[INSERT YESTERDAY'S DATE ; USE FORMAT OF MONTH (NAME OF MONTH), DAY (WITH NOT LEADING ZERO), YEAR (YYYY)]**...

Did **[INSERT IF PRIMARY RESPONDENT:** you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** receive any wages, salary, tips, bonuses, or commissions?

1. Yes
2. No

BASE: SHOW IF HAVEWAGE=1 'YES'

WAGEX [NUMERIC BOX; RANGE 1-20,000,000]
How much did **[INSERT IF PRIMARY RESPONDENT:** you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** receive before taxes?

$ **[INSERT NUMERIC BOX; RANGE 1-20,000,000]**

BASE: SHOW IF WAGEX=-1 'REFUSED'

WAGEB [S]
Which range best reflects **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** total wages and salaries for ALL JOBS during the PAST 12 MONTHS?

1. $1-$4,999
2. $5,000-$9,999
3. $10,000-$14,999
4. $15,000-$19,999
5. $20,000-$29,999
6. $30,000-$39,999
7. $40,000-$49,999
8. $50,000-$69,999
9. $70,000-$89,999
10. $90,000-$119,999
11. $120,000 and over

GROSPAYX [NUMERIC BOX; RANGE 1-2,000,000]
What was the amount of **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** last pay before any deductions?

$ **[INSERT NUMERIC BOX; RANGE 1-2,000,000]**

PAYPERD [S]
What period of time did this cover?

Select one answer only.

1. One week
2. Two weeks
3. Month
4. Quarter
5. Year
6. Twice a month
7. Other, please specify **[O]**

PVT [S]
Was there any money deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** private pension fund?

These are pay deductions for a private pension fund. These are NOT deductions for contributions to personal retirement accounts (such as 401(k)s, IRAs, SEP accounts).

1. Yes
2. No

PVTX [NUMERIC BOX; RANGE 1-800,000]
How much money was deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** private pension fund?

$ **[INSERT NUMERIC BOX; RANGE 1-800,000]**

GV [S]
Was there any money deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** government retirement?

1. Yes
2. No

GVX [NUMERIC BOX; RANGE 1-500,000]
How much money was deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** government retirement?

$ **[INSERT NUMERIC BOX; RANGE 1-500,000]**

RR [S]
Was there any money deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** railroad retirement?

1. Yes
2. No

RRX [NUMERIC BOX; RANGE 1-20,000]
How much money was deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** railroad retirement?

$ **[INSERT NUMERIC BOX; RANGE 1-20,000]**

SSDED [S]
Was there any money deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay for **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER:** their**]** Social Security including Medicare?

Social Security payroll taxes are also known as OASDI (Old Age, Survivor and Disability Insurance) taxes.

1. Yes
2. No

SSNORM [S]
Are Social Security payments NORMALLY deducted from **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pay?

1. Yes
2. No

MEDICOV [S]
Does the money deducted for Social Security cover only the Medicare portion of Social Security?

1. Yes
2. No

BASE: SHOW IF HAVEWAGE=1 'YES'

EMPLCONT [S]
Other than Social Security, did any employer or union contribute to **[INSERT IF PRIMARY RESPONDENT: your ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** pension or retirement plan in the last 12 months?

1. Yes
2. No

BASE: SHOW FOR PRIMARY RESPONDENT AND ALL HOUSEHOLD MEMBERS 14 OR OLDER

SEMPFRM [S]
During the PAST 12 MONTHS…

Did **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** receive any self-employment income or have a loss?

Report income from own businesses (farm or non-farm) including proprietorships and partnerships.

1. Yes
2. No

BASE: SHOW IF SEMPFRM=1 'YES'

SEMPFRMX [NUMERIC BOX; RANGE -2,000,000 TO 20,000,000]
What was the amount?

Report net income after operating expenses. Include earnings as a tenant farmer or sharecropper.

Please indicate the amount and whether or not it was a profit or loss below.

$ **[INSERT NUMERIC BOX; RANGE -2,000,000 TO 20,000,000]**

1. Profit
2. Loss

BASE: SHOW IF SEMPFRMX=-1 'REFUSED'

SEMPFRMB [S]
Which range best reflects **[INSERT IF PRIMARY RESPONDENT: your ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** income or loss from self-employment during the PAST 12 MONTHS?

0. Loss
1. $1-$4,999
2. $5,000-$9,999
3. $10,000-$14,999
4. $15,000-$19,999
5. $20,000-$29,999
6. $30,000-$39,999
7. $40,000-$49,999
8. $50,000-$69,999
9. $70,000-$89,999
10. $90,000-$119,999
11. $120,000 and over

BASE: SHOW FOR PRIMARY RESPONDENT AND ALL HOUSEHOLD MEMBERS 14 OR OLDER

SOCSRRET [S]

During the PAST 12 MONTHS…

Did **[INSERT IF PRIMARY RESPONDENT:** you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** receive any Social Security or Railroad Retirement benefits?

1. Yes
2. No

BASE: SHOW IF SOCSRRET=1 'YES'

SS_RRX [NUMERIC BOX; RANGE 1-25,000]
What was the amount of the last Social Security or Railroad Retirement payment received?

$ **[INSERT NUMERIC BOX; RANGE 1-25,000]**

BASE: SHOW IF SOCSRRETX=-1 'REFUSED'

SS_RRB [S]
Which range best reflects **[INSERT IF PRIMARY RESPONDENT:** your ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME**'s**]** last Social Security or Railroad Retirement payment during the PAST 12 MONTHS?

1. Less than $500
2. $500-$699
3. $700-$999
4. $1,000-$1,299
5. $1,300-$1,699
6. $1,700 and over

BASE: SHOW IF SOCSRRET=1 'YES'

MEDICARE [S]
Is this amount AFTER the deduction for a Medicare premium?

1. Yes
2. No

BASE: SHOW IF SOCSRRET=1 'YES'

SS_RRQ [NUMERIC BOX; RANGE 1-12]
During the past 12 months, how many Social Security or Railroad Retirement payments did **[INSERT IF PRIMARY RESPONDENT:** you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** receive?

[INSERT NUMERIC BOX; RANGE 1-12] Number of payments

BASE: SHOW FOR PRIMARY RESPONDENT AND ALL HOUSEHOLD MEMBERS 14 OR OLDER

US_SUPP [S]
During the PAST 12 MONTHS…

Did **[INSERT IF PRIMARY RESPONDENT:** you ; **INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** receive any Supplemental Security Income (SSI) payments?

1. Yes
2. No

BASE: SHOW IF US_SUPP=1 'YES'

SUPPX [NUMERIC BOX; RANGE 1-80,000]
What was the amount?

$ **[INSERT NUMERIC BOX; RANGE 1-80,000]**

SUPPB [S]
Which range best reflects the amount **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** received in Supplemental Security Income during the past 12 months?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

IRA [S]
During the PAST 12 MONTHS…

Did **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF OTHER HH MEMBER AGE 14 OR OLDER: INSERT PERSON NAME]** contribute any money to retirement plans such as 401(k)s or Individual Retirement Accounts, also known as IRAs? Do not include rollovers.

1. Yes
2. No

IRAX [NUMERIC BOX; RANGE 1-300,000]
How much?

$ **[INSERT NUMERIC BOX; RANGE 1-300,000]**

INTERDIV [S]
Up until this point in the survey, we have asked about earnings for individual members. Now we would like to ask questions **about your household as a whole**.

During the PAST 12 MONTHS…

Did **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF DOV_PERSON>1:** you or anyone in your household**]** receive any interest or dividends?

Report even small amounts credited to an account.

1. Yes
2. No

BASE: SHOW IF INTERDIV=1 'YES'
INTRDVX [NUMERIC BOX; RANGE 1-2,000,000]
What was the amount?

$ **[INSERT NUMERIC BOX; RANGE 1-2,000,000]**

BASE: SHOW IF INTRDVX=-1 'REFUSED'
INTRDVB [S]
Which range best reflects the amount **[INSERT IF PRIMARY RESPONDENT: you ; INSERT IF DOV_PERSON>1: you or anyone in your household]** received in interest or dividends during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS
NETRENT [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1: you ; INSERT IF DOV_PERSON>1: you or anyone in your household]** receive any net rental income or a loss?

Net rental income is the total amount after expenses.

1. Yes
2. No

BASE: SHOW IF NETRENT=1 'YES'
NETRENTX [NUMERIC BOX; RANGE -200,000 TO 2,000,000]
What was the amount?

Please indicate the amount and whether or not it was a profit or loss below.

$ **[INSERT NUMERIC BOX; RANGE -200,000 TO 2,000,000]**

1. Profit
2. Loss

BASE: SHOW IF NETRENTX=-1 'REFUSED'
NETRENTB [S]
Which range best reflects the total net rental income or loss during the PAST 12 MONTHS?

0. Loss
1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS

ROYEST [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you ; **INSERT IF DOV_PERSON>1:** you or anyone in your household**]** receive any royalty income or income from estates and trusts?

1. Yes
2. No

BASE: SHOW IF ROYEST=1 'YES'

ROYESTX [NUMERIC BOX; RANGE 1-2,000,000]
What was the amount?

$ **[INSERT NUMERIC BOX; RANGE 1-2,000,000]**

BASE: SHOW IF ROYESTX=-1 'REFUSED'

ROYESTB [S]
Which range best reflects the total amount received in royalty income or income from estates and trusts during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS

RETSURV [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you ; **INSERT IF DOV_PERSON>1:** you or anyone in your household**]** receive any retirement, survivor, or disability pensions?

1. Yes
2. No

BASE: SHOW IF RETSURV=1 'YES'
RETSURVX [NUMERIC BOX; RANGE 1-2,000,000]
What was the amount?

Do not include Social Security.

$ **[INSERT NUMERIC BOX; RANGE 1-2,000,000]**

BASE: SHOW IF RETSURVX=-1 'REFUSED'
RETSURVB [S]
Which range best reflects the total amount received in retirement, survivor, or disability pensions during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS
OTHREG [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you ; **INSERT IF DOV_PERSON>1:** you or anyone in your household]** receive income on a REGULAR basis from any other source such as Veteran's Administration (VA) payments, unemployment compensation, child support, or alimony?

1. Yes
2. No

BASE: SHOW IF OTHREG=1 'YES'
OTHREGX [NUMERIC BOX; RANGE 1-2,000,000]
What was the amount from all sources?

Do not include lump sum payments such as money from an inheritance or sale of a home.

$ **[INSERT NUMERIC BOX; RANGE 1-2,000,000]**

BASE: SHOW IF OTHREGX=-1 'REFUSED'
OTHREGB [S]

Which range best reflects the total amount received in Veteran's Administration (VA) payments, unemployment compensation, child support, or alimony during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS

LUMP [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you **; INSERT IF DOV_PERSON>1:** you or anyone in your household]** receive any lump sum payments from insurance, estates, trusts, royalties, child support, alimony, prizes or games of chance, or from people who are outside the household?

1. Yes
2. No

BASE: SHOW IF LUMP=1 'YES'

LUMPX [NUMERIC BOX; RANGE 1-10,000,000]
What was the total amount received **[INSERT IF DOV_PERSON>1:** by ALL the people in your household]**?

$ **[INSERT NUMERIC BOX; RANGE 1-10,000,000]**

BASE: SHOW IF LUMPX=-1 'REFUSED'

LUMPB [S]
Which range best reflects the total lump sum payments received during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS

OTHIN [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you **; INSERT IF DOV_PERSON>1:** you or anyone in your household**]** receive any other money income, including money received from cash scholarship and fellowship, stipends not based on working, or from the care of foster children, not already reported?

1. Yes
2. No

BASE: SHOW IF OTHIN=1 'YES'

OTHINX [NUMERIC BOX; RANGE 1-1,000,000]

What was the total amount received **[INSERT IF DOV_PERSON>1:** by ALL the people in your household**]**?

$ **[INSERT NUMERIC BOX; RANGE 1-1,000,000]**

BASE: SHOW IF OTHINX=-1 'REFUSED'

OTHINB [S]

Which range best reflects the total amount of other money income received during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS

ADDOTH [S]

During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you **; INSERT IF DOV_PERSON>1:** you or anyone in your household**]** PAY any inheritance or estate taxes?

1. Yes
2. No

BASE: SHOW IF ADDOTH=1 'YES'

ADDOTHX [NUMERIC BOX; RANGE 1-2,000,000]

What was the total amount PAID **[INSERT IF DOV_PERSON>1:** by ALL the people in your household**]**?

$ **[INSERT NUMERIC BOX; RANGE 1-2,000,000]**

BASE: ALL RESPONDENTS

OCCEXPN [S]

During the PAST 12 MONTHS…

Did **[INSERT IF HHSIZE=1:** you **; INSERT IF HHSIZE>1:** you or anyone in your household**]** have any occupational expenses such as union dues, tools, uniforms, business or professional association dues, licenses, or permits?

1. Yes
2. No

BASE: SHOW IF OCCEXPN=1 'YES'
OCCEXPNX [NUMERIC BOX; RANGE 1-150,000]
What was the total amount of these occupational expenses?

$ **[INSERT NUMERIC BOX; RANGE 1-150,000]**

BASE: ALL RESPONDENTS
REC_FS [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you **; INSERT IF DOV_PERSON>1:** you or anyone in your household**]** receive Food Stamps or a Food Stamp benefit card? Include government benefits from the Supplemental Nutritional Assistance Program (SNAP).

Do NOT include WIC or the National School Lunch Program.

1. Yes
2. No

BASE: SHOW IF REC_FS=1 'YES'
FS_MTHI [NUMERIC BOX; RANGE 1-12]
In how many of the last 12 months were food stamps or EBTs received?

[INSERT NUMERIC BOX] Months

BASE: SHOW IF REC_FS=1 'YES'
FS_AMT [NUMERIC BOX; RANGE 1-6,000]
What was the dollar value of the last food stamps or EBT received?

$ **[INSERT NUMERIC BOX; RANGE 1-6,000]**

BASE: ALL RESPONDENTS
PAWELFAR [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you **; INSERT IF DOV_PERSON>1:** you or anyone in your household, including any children,**]** receive any welfare payments or cash assistance from the state or local welfare office?

Please include even if only for one month. Do NOT include benefits from food, energy, or rental assistance programs.

1. Yes
2. No

BASE: SHOW IF PAWELFAR=1 'YES'

WELFRX [NUMERIC BOX; RANGE 1-100,000]
What was the amount for the PAST 12 MONTHS?

$ **[INSERT NUMERIC BOX; RANGE 1-100,000]**

BASE: SHOW IF WELFRX=-1 'REFUSED'

WELFRB [S]
Which range best reflects the total amount of income from cash assistance from state or local government welfare programs **[INSERT IF HHSIZE=1:** you ; **INSERT IF HHSIZE>1:** you or anyone in your household]** received during the PAST 12 MONTHS?

1. $1-$999
2. $1,000-$1,999
3. $2,000-$2,999
4. $3,000-$3,999
5. $4,000-$4,999
6. $5,000-$9,999
7. $10,000-$14,999
8. $15,000-$19,999
9. $20,000-$29,999
10. $30,000-$39,999
11. $40,000-$49,999
12. $50,000 and over

BASE: ALL RESPONDENTS

FREEMEAL [S]
During the PAST 12 MONTHS…

Have **[INSERT IF DOV_PERSON=1:** you ; **INSERT IF DOV_PERSON>1:** you or anyone in your household]** received any free meals at work as part of your pay?

1. Yes
2. No

BASE: SHOW IF FREEMEAL=1 'YES'

FREEMLX [NUMERIC BOX; RANGE 1-1,000]
About what was the weekly dollar value of such meals?

$ **[INSERT NUMERIC BOX; RANGE 1-1,000]**

BASE: SHOW IF FREEMEAL=1 'YES'

MEALWKI [NUMERIC BOX; RANGE 1-52]
How many weeks did **[INSERT IF DOV_PERSON=1:** you ; **INSERT IF DOV_PERSON>1:** you or anyone in your household]** receive such meals during the last 12 months?

[INSERT NUMERIC BOX; RANGE 1-52] Weeks

BASE: SHOW IF QOWN=2 OR 3 OR -1 'REFUSED'

RTASPAY [S]
During the PAST 12 MONTHS…

Did **[INSERT IF DOV_PERSON=1:** you ; **INSERT IF DOV_PERSON>1:** you or anyone in your household]** receive any free or reduced rent for this unit as a form of pay?

1. Yes
2. No

BASE: SHOW IF RTASPAY=1 'YES'

RTCOMPX [NUMERIC BOX; RANGE 0-40,000]
What is the rental charge to another tenant for a similar unit?

$ **[INSERT NUMERIC BOX; RANGE 0-40,000]**

BASE: SHOW IF RTASPAY=1 'YES'

RTCMPPD [S]
What period of time does this cover?

Select one answer only.

1. Week
2. 2 Weeks
3. Month
4. Other **[O]**

BASE: ALL RESPONDENTS

DIARYCONSENT [S; PROMPT]
Thank you very much for completing our survey! You will receive **2,000 survey points** for participating in the survey you just completed.

We are very interested in having you participate in another part of our study - our Spending Diary. If you agree to participate, we are asking that for each day during a two-week period you enter your spending or indicate that you do not have any expenses. You will earn **50,000 survey points** if you report information for **every day** of your two-week Spending Diary period. Though it is encouraged, you are not required to log in to the diary each day to record your entries, as long as you provide information for all days during the two-week period. The Spending Diary will be available starting tomorrow.

Are you willing to participate in this Spending Diary?

1. Yes
2. No

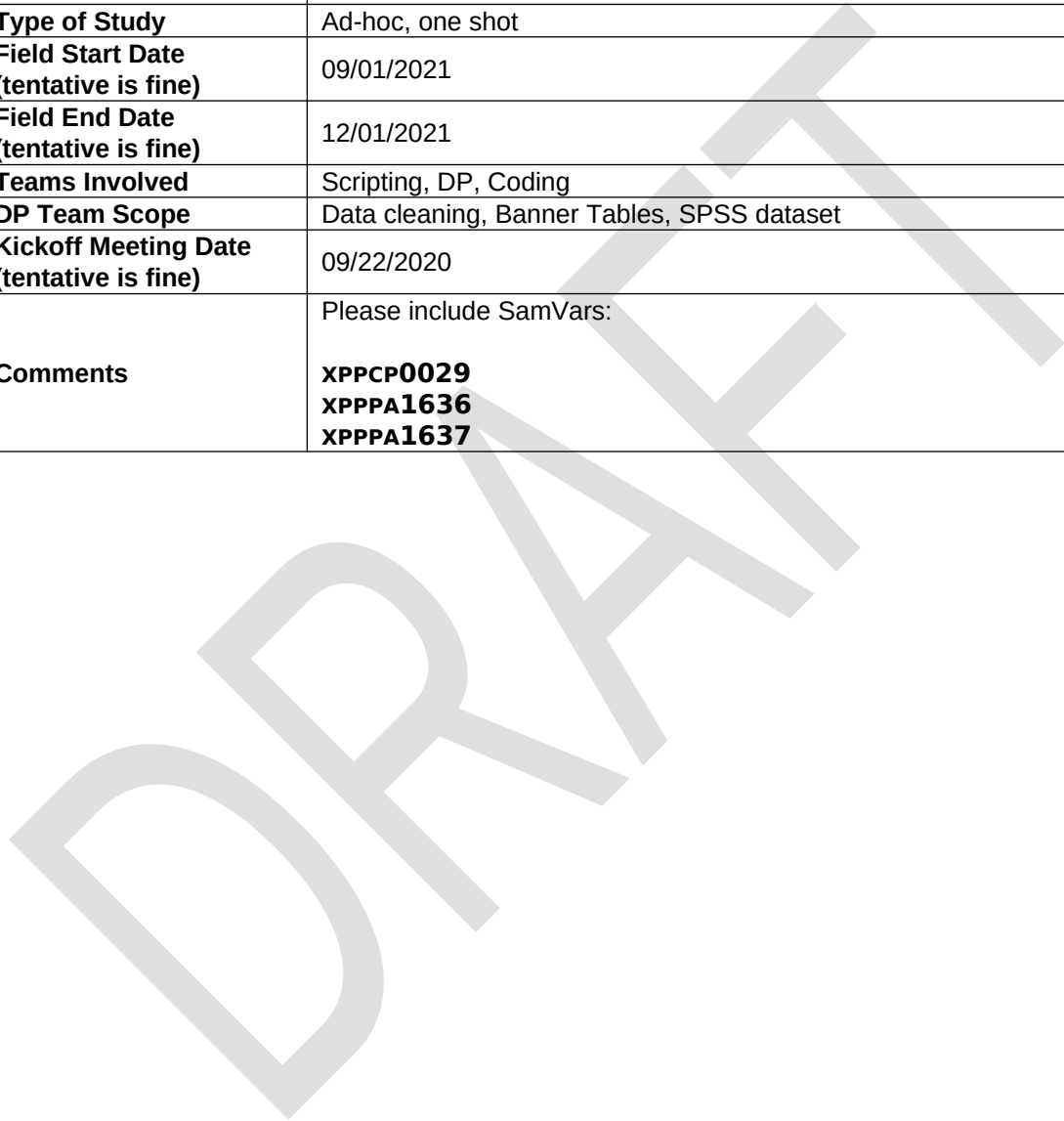**BASE: ALL RESPONDENTS**

QF1 [O]
Thinking about this topic, do you have any comments you would like to share? Any comments welcome!

[INSERT MEDIUM TEXT BOX]

END OF SURVEY

Study Information

Client	US Bureau of Labor Statistics (BLS)
Project Name	Consumer Expenditure Online Diary Project – Spending Diary Landing Page
Account Executive	Robert Torongo
Project Manager	Ryan Tully
Ipsos Job Number	20-065842-01
SNO(s)	TBD
LOI	TBD
Type of Study	Ad-hoc, one shot
Field Start Date (tentative is fine)	09/01/2021
Field End Date (tentative is fine)	12/01/2021
Teams Involved	Scripting, DP, Coding
DP Team Scope	Data cleaning, Banner Tables, SPSS dataset
Kickoff Meeting Date (tentative is fine)	09/22/2020
Comments	Please include SamVars: XPPCP0029 XPPPA1636 XPPPA1637

Sample Variables

- KP standard demographics

Main Questionnaire

Programming Notes:
- *Code all refusals as -1.*
- *Use default instruction text for each question type unless otherwise specified.*
- *Do not prompt on all questions. (Remove this instruction if sample is all opt-in, client list sample, or otherwise not KP.)*

Introduction

BASE: MAIN RESPONDENT

RECRUITMENT DISPLAY [D]
Thank you for agreeing to participate in the U.S. Bureau of Labor Statistics Consumer Spending Diary!

You will be brought to this page every time you log in to the Spending Diary. As a reminder, we would like you to report on any expenses that you may have for each day of this two-week period. You will earn **50,000 survey points** if you report information for **every day** of your two-week Spending Diary period, regardless if you have expenses or not.

Please indicate below if you had any expenses for the dates listed. It is important to have accurate answers. If you did not have any expenses for a given date, please report that as well.

Statements in row:

[INSERT DATES CHRONOLOGICALLY BY DATE; SHOW DATE FOR APPROPRIATE DAY AND ANY PRECEDING DAYS THAT HAVE NOT BEEN ANSWERED]

Answers in column:

1. Had expenses
2. NO expenses

Questions in Online Diary Instrument for Self-Administered Diary Test, by Type of Expense

<u>Meals, Snacks, and Drinks Away from Home</u>

-Select date of expense
-Enter business name
-Total cost (include tax and/or tip)
-Select Type of Vendor:
- o Fast Food, Take-out, Delivery, Concession
- o Full Service Places
- o Vending Machines or Mobile Vendors
- o Employer or School Cafeteria
-Select any alcohol included:
- o Wine
- o Beer
- o Other
- o None
-Enter the total cost of the alcohol

<u>Food and Drinks for Home Consumption</u>

-Select date of expense
-Enter business name
-Describe item or expense
-Total cost (do not include tax)
-How was the item packaged?
- o Fresh
- o Frozen
- o Bottled/Canned
- o Other

<u>Clothing, Shoes, Jewelry, and Accessories</u>

-Select date of expense
-Enter business name
-Describe item or expense
-Total cost (do not include tax)
-Was this item for:
- o Child under 2
- o Boy 2-15
- o Girl 2-15
- o Man 16 & over
- o Woman 16 & over

<u>All Other Products, Services, and Expenses</u>

-Select date of expense
-Enter business name
-Describe item or expense
-Total cost (do not include tax)