# Consumer Expenditure Quarterly Interview Survey 2012 Instrument Requirements

**Research block and other BACK section changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **2011 CEQ CAPI Wording/Specification** | **2012 CEQ Change** |
| --- | --- | --- | --- | --- |
| Research block, BACK section | BRESEARCH | Change universe to only interviews 3 and 5. | COMPLETE\_FLAG=1 and NOCONTACT=0 | COMPLETE\_FLAG=1, NOCONTACT=0, and INTNMBR=3 or 5 |
| Research block, BACK section | RES\_INTRO | Change pathing to next question. 3rd interviews will go to FINSOFT. The next question for 5th interviews will depend on the time of year: * LE\_INTRO will be the next question for 2012Q2 and 2012Q3
* BN\_INTRO will be the next question for 2012Q4 and 2013Q1.
 | We’re almost done with the survey. I just have a few questions before we wrap up.1. Continue

Value/skip instructions:<1> if INTNMBER=5 go to RESPOBJ, else go to RESPIB | We’re almost done with the survey. I just have a few questions before we wrap up.1. Continue

Value/skip instruction:<1> if INTNMBR=5 and INTPER = 201204, 201205, 201206, 201207, 201208, or 201209 go to LE\_INTRO, if INTNMBR=5 and INTPER = 201210, 201211, 201212, 201301, 201302, 201303 go to BN\_INTRO, else if INTNMBER=3 go to FINSOFT. |
| Research block, BACK section | RESPOBJ | Delete question | We'd like to produce additional statistical data, without taking up your time with more questions, by combining your survey answers with data from other government agencies. Do you have any objections?1. Yes, object
2. No, do not object

Value/skip instructions:<1> go to RESOBJSP<2, D, R> go to RESPIB | Delete question. |
| Research block, BACK section | RESOBJSP | Delete question | What are your objections? (specify field)Value/skip instructions:<30 char, D, R> go to RESPIB | Delete question. |
| Research block, BACK section | RESPIB | Delete question. | \*Enter 4 if not a personal visit\* Did you provide the Information Booklet to the respondent?1. Yes, respondent used Info Book
2. Yes, respondent did not use Info Book
3. No, did not provide Info Book
4. Not a personal visit

Value/skip instructions: <1> go to IBHELPFL<2> go to NOUSEIB<3, 4> if INTNMBR=3 go to AUTOBLP else EXIT RESEARCH BLOCK | Delete question. |
| Research block, BACK section | IBHELPFL | Delete question. | During the interview we referred to a booklet that lists a variety of things you might have purchased. Was this booklet helpful to you?1. Yes
2. No

Value/skip instructions:<1, R> if INTNMBR=3 go to AUTOBLPY else EXIT RESEARCH BLOCK<2, D> go to IBNTHPFL | Delete question. |
| Research block, BACK section | IBNTHPFL | Delete question. | Why wasn’t the booklet helpful? \* Enter all that apply, separate with commas1. It was too long
2. It was too hard to use
3. It took too much time to use
4. There were too many examples
5. It was hard to read
6. It wasn’t clear I was supposed to use it
7. This wasn’t my first interview – knew what you would ask
8. Other, specify

Value/skip instructions:<1-7, D, R> if INTNMBR=3 go to AUTOBLPY else EXIT RESEARCH BLOCK<8> go to IBNTHPSP | Delete question. |
| Research block, BACK section | IBNTHPSP | Delete question. | \* Specify:Value/skip instructions:<30 char, D, R> if INTNMBR=3 go to AUTOBLPY else EXIT RESEARCH BLOCK | Delete question. |
| Research block, BACK section | NOUSEIB | Delete question. | Before we started the interview, I gave you a booklet that lists a variety of things you might have purchased. What about the book made you decide not to use it?\* Enter all that apply, separate with commas1. It was too long
2. It looked too hard to use
3. It took too much time to use
4. There were too many examples
5. It was hard to read
6. It wasn’t clear I was supposed to use it
7. This wasn’t my first interview – I knew what you would ask
8. Other, specify

Value/skip instructions:<1-7, D, R> if INTNMBR=3 go to AUTOBLPY,  else EXIT RESEARCH BLOCK<8> go to NOUSIBSP | Delete question. |
| Research block, BACK section | NOUSEIBSP | Delete question. | \* Specify:Value/skip instructions:<30 char, D, R> if INTNMBR=3 go to AUTOBLPY,  else EXIT RESEARCH BLOCK | Delete question. |
| Research block, BACK section | AUTOBLPY | Delete question. | [fill: Do/Does] [fill: YOU\_ANYMEM] pay any bills through automatic deductions from a bank account?1. Yes
2. No

Value/skip instructions:<1, 2, D, R> go to FINSOFT | Delete question. |
| Research block, BACK section | FINSOFT | Universe change. | [fill: Do/Does] [fill: YOU\_ANYMEM] use any electronic financial software, such as Quicken, or use a website to track your expenses?1. Yes
2. No

Value/skip instructions:<1> go to FNSFTTYP<2, D, R> EXIT RESEARCH BLOCK | FINSOFT follows RES\_INTRO if INTNMBR=3. |
| Research block, BACK section | FNSFTTYP | New option added between “Mint.com” and “Other, specify.” | What software or website do you use?\* Enter all that apply, separate with commas1. Quicken2. Microsoft Money3. Mint.com4. Other, specifyValue/skip instructions:<1, 2, 3, D, R> go to EXIT RESEARCH BLOCK< 4> go to FNSFTSP | What software or website do you use to track your expenses?\* Enter all that apply, separate with commas1. Quicken2. Microsoft Money3. Mint.com4. Bank Website5. Other, specifyValue/skip instructions:<1-4, D, R> go to EXIT RESEARCH BLOCK< 5> go to FNSFTSP |
| Research block, BACK section | FNSFTSP | New question wording. | \* Specify: Value/skip instructions:<30 char, D, R> go to EXIT RESEARCH BLOCK | Which software or website do you use?Value/skip instructions:<30 char, D, R> go to EXIT RESEARCH BLOCK |
| Research block, BACK section | New variable LE\_INTRO | New question following RES\_INTRO for 5th interviews in 2012Q2 and 2012Q3. | N/A | This survey asked about things you’ve purchased in the past three months. To help us better understand how people spend their money, I have a few questions about other things that have been going on in your life in the past three months.1. Continue

Value/skip instructions:<1> go to LNDEVT01 |
| Research block, BACK section | New variable LNDEVT01 | New question following LE\_INTRO for 5th interviews in 2012Q2 and 2012Q3. | N/A | Since the first of ^REFMONTH, have [fill: you/you or your household] had any major life events - things such as birthdays, weddings, moves, or new jobs?1. Yes
2. No

Fill instructions: If single person CU, fill “you” else fill “you or your household”Value/skip instructions:<1> go to LNDEVT02<2, D, R> go to EXIT RESEARCH BLOCK |
| Research block, BACK section | New variable LNDEVT02 | New question following LNDEVT01 (if LNDEVT01=1) for 5th interviews in 2012Q2 and 2012Q3. | N/A | What was the event?Value/skip instructions:<30 char, D, R> go to LNDEVT03 |
| Research block, BACK section | New variable LNDEVT03 | New question following LNDEVT02 for 5th interviews in 2012Q2 and 2012Q3.(Use month list used in other CEQ variables such as MAJ\_MO but allow multiple entries.) | N/A | When was the event?\* Enter all that apply, separate with commas.1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

(only show months applicable to reference period – REF\_MONTH – CUR\_MONTH)Value/skip instructions: <REF\_MONTH – CUR\_MONTH> if an entry is not in the reference period go to a hard error else go to LNDEVT04<D, R> go to LNDEVT04 |
| Research block, BACK section | New variable LNDEVT04 | New question following LNDEVT03 for 5th interviews in 2012Q2 and 2012Q3. | N/A | What expenses did you have related to the event?Value/skip instructions:<30 char, D, R> go to LNDEVT05 |
| Research block, BACK section | New variable LNDEVT05 | New question following LNDEVT04 for 5th interviews in 2012Q2 and 2012Q3. (Use month list used in other CEQ variables such as MAJ\_MO but allow multiple entries.) | N/A | When was the expense?\* Enter all that apply, separate with commas.1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

(only show months applicable to reference period – REF\_MONTH – CUR\_MONTH)Value/skip instructions: <REF\_MONTH – CUR\_MONTH> if an entry is not in the reference period go to a hard error else go to LNDEVT06<D, R> go to LNDEVT04 |
| Research block, BACK section | New variable LNDEVT06 | New question following LNDEVT05 for 5th interviews in 2012Q2 and 2012Q3. | N/A | Since the first of ^REFMONTH, have [fill: you/you or your household] experienced any other unusual or memorable events?1. Yes
2. No

Fill instructions: If single person CU, fill “you” else fill “you or your household”Value/skip instructions:<1> go to LNDEVT07<2, D, R> go to EXIT RESEARCH BLOCK |
| Research block, BACK section | New variable LNDEVT07 | New question following LNDEVT06 for 5th interviews in 2012Q2 and 2012Q3. | N/A | What was the event?Value/skip instructions:<30 char, D, R> go to LNDEVT08 |
| Research block, BACK section | New variable LNDEVT08 | New question following LNDEVT07 for 5th interviews in 2012Q2 and 2012Q3. | N/A | When was the event?\* Enter all that apply, separate with commas.1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

(only show months applicable to reference period – REF\_MONTH – CUR\_MONTH)Value/skip instructions: <REF\_MONTH – CUR\_MONTH> if an entry is not in the reference period go to a hard error else go to LNDEVT09<D, R> go to LNDEVT09 |
| Research block, BACK section | New variable LNDEVT09 | New question following LNDEVT08 for 5th interviews in 2012Q2 and 2012Q3. | N/A | What expenses did you have related to the event?Value/skip instructions:<30 char, D, R> go to LNDEVT10 |
| Research block, BACK section | New variable LNDEVT10 | New question following LNDEVT09 for 5th interviews in 2012Q2 and 2012Q3. | N/A | When was the expense?\* Enter all that apply, separate with commas.1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

(only show months applicable to reference period – REF\_MONTH – CUR\_MONTH)Value/skip instructions: <REF\_MONTH – CUR\_MONTH> if an entry is not in the reference period go to a hard error else go to EXIT RESEARCH BLOCK<D, R> go to EXIT RESEARCH BLOCK |
| Research block, BACK section | New variable BN\_INTRO | New question following RES\_INTRO for 5th interviews in 2012Q4 and 2013Q1. | N/A | I would like to change topics and ask you a few questions about your experience completing this interview. Your responses will help us improve the survey1. Continue

Value/skip instructions:<1 > go to BURDEN01 |
| Research block, BACK section | New variable BURDEN01 | New question following BN\_INTRO for 5th interviews in 2012Q4 and 2013Q1. | N/A | Do you feel that the length of today’s interview was too long, too short, or about right?1. Too long
2. Too short
3. About right

Value/skip instructions:<1-3, D, R> go to BURDEN02 |
| Research block, BACK section | New variable BURDEN02 | New question following BURDEN01 for 5th interviews in 2012Q4 and 2013Q1. | N/A | How interesting was this survey to you?1. Very interesting
2. Somewhat interesting
3. A little interesting
4. Not at all interesting

Value/skip instructions:<1-4, D, R> go to BURDEN03 |
| Research block, BACK section | New variable BURDEN03 | New question following BURDEN02 for 5th interviews in 2012Q4 and 2013Q1. | N/A | How difficult or easy was it for you to answer the questions in this survey?1. Very easy
2. Somewhat easy
3. Somewhat difficult
4. Very difficult

Value/skip instructions:<1-4, D, R> go to BURDEN04 |
| Research block, BACK section | New variable BURDEN04 | New question following BURDEN03 for 5th interviews in 2012Q4 and 2013Q1. | N/A | You were asked to participate in five interviews. Would you say that this was too many interviews or did it seem like a reasonable number?1. Too many interviews
2. A reasonable number

Value/skip instructions:<1-2, D, R> go to BURDEN05 |
| Research block, BACK section | New variable BURDEN05 | New question following BURDEN04 for 5th interviews in 2012Q4 and 2013Q1. | N/A | How burdensome was this survey to you?1. Very burdensome
2. Somewhat burdensome
3. A little burdensome
4. Not at all burdensome

Value/skip instructions:<1-4, D, R> go to BURDEN06 |
| Research block, BACK section | New variable BURDEN06 | New question following BURDEN05 for 5th interviews in 2012Q4 and 2013Q1. | N/A | How sensitive did you feel the questions I asked today were?1. Very sensitive
2. Somewhat sensitive
3. A little sensitive
4. Not at all sensitive

Value/skip instructions:<1-4, D, R> go to BURDEN07 |
| Research block, BACK section | New variable BURDEN07 | New question following BURDEN06 for 5th interviews in 2012Q4 and 2013Q1. | N/A | How agreeable would you be to take another survey like this in the future?1. Very agreeable
2. Somewhat agreeable
3. Not at all agreeable

Value/skip instructions:<1-3, D, R> go to BURDEN08 |
| Research block, BACK section | New variable BURDEN08 | New question following BURDEN07 for 5th interviews in 2012Q4 and 2013Q1. | N/A | If we had to extend this survey for another 15 minutes, how willing would you have been to continue the interview?1. Very willing
2. Somewhat willing
3. Somewhat unwilling
4. Very unwilling

Value/skip instructions:<1-4, D, R> go to BURDEN09 |
| Research block, BACK section | New variable BURDEN09 | New question following BURDEN08 for 5th interviews in 2012Q4 and 2013Q1. | N/A | Thinking about the amount of effort that you put forth into answering today’s survey, would you say that you put forth?1. A lot of effort
2. A moderate amount of effort
3. A little effort

Value/skip instructions:<1-3, D, R> go to BURDEN10 |
| Research block, BACK section | New variable BURDEN10 | New question following BURDEN09 for 5th interviews in 2012Q4 and 2013Q1. | N/A | Please tell me if you agree or disagree with the following statement:I trust the U.S. Census Bureau to safeguard the information that I have provided them.1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree

Value/skip instructions:<1-5, D, R> go to EXIT RESEARCH BLOCK |
| BACK section | RECT\_SEC | Change skip instructions. | \* Which of these sections did the respondent(s) use bills, receipts, or other resources to answer expenditure questions? \* Enter all that apply, separate with commas.1. Sections 2 and 3 Housing – rent, mortgage, home equity loans
2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet)
3. Section 6 Appliances
4. Section 8 Home Furnishings
5. Section 9 Clothing
6. Sections 10, 11, and 12 Vehicle Expenses
7. Sections 13 and 14 Insurance
8. Section 15 Medical/Health Expenses
9. Section 18 Trips and Vacations
10. Section 22 Work Experience and Income

Value/skip instructions:<1-10> if INTNMBR=3 or 5 go to RSCHRECS,  Else go to HOMEFILE | \* Which of these sections did the respondent(s) use bills, receipts, or other resources to answer expenditure questions? \* Enter all that apply, separate with commas.1. Sections 2 and 3 Housing – rent, mortgage, home equity loans
2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet)
3. Section 6 Appliances
4. Section 8 Home Furnishings
5. Section 9 Clothing
6. Sections 10, 11, and 12 Vehicle Expenses
7. Sections 13 and 14 Insurance
8. Section 15 Medical/Health Expenses
9. Section 18 Trips and Vacations
10. Section 22 Work Experience and Income

Value/skip instructions:<1-10> go to HOMEFILE |
| BACK section | RSCHRECS | Delete question. | \* Did the respondent hand you any records, bills, or receipts during the interview? Records such as utility bills, mortgage statements, credit card bills, or pay stubs.1. Yes
2. No

Value/skip instructions:<1> go to REC\_SP<2> go to HOMEFILE | Delete question. |
| BACK section | REC\_SP | Delete question. | \* Please describe the records given to you. Value/skip instructions:<30 char> go to RECINFO | Delete question. |
| BACK section | RECINFO | Delete question. | \* For most of the records, were you able to find the required information (e.g., item description, date, price)?1. Yes
2. No

Value/skip instructions:<1> go to HOMEFILE<2> go to RECDIFF | Delete question. |
| BACK section | RECDIFF | Delete question. | \* Why were you unable to find the required expenditure information?\* Enter all that apply, separate with commas.1. The record was unclear, difficult to read
2. The record did not provide the required level of detail
3. The record did not match the expenditure categories
4. Other, specify

Value/skip instructions:<1-3> go to HOMEFILE<4> go to RECD\_SP | Delete question. |
| BACK section | RECD\_SP | Delete question. | \* Specify:Value/skip instructions:<30 char> go to HOMEFILE | Delete question. |
| BACK section | RESPEFF | Change skip instructions. | \* How much effort would you say this respondent put into answering the expenditure questions during this interview?1. A lot of effort (e.g., looked at a lot of bills, read the Information Book, asked clarifying questions)
2. A moderate amount of effort (e.g., looked at a few bills, seemed to skim Information Book)
3. A bare minimum of effort (e.g., gave answers without much apparent thought, no consultation of records or Information Book)

Value/skip instructions:<1-3> go to EFFCHG | \* How much effort would you say this respondent put into answering the expenditure questions during this interview?1. A lot of effort (e.g., looked at a lot of bills, read the Information Book, asked clarifying questions)
2. A moderate amount of effort (e.g., looked at a few bills, seemed to skim Information Book)
3. A bare minimum of effort (e.g., gave answers without much apparent thought, no consultation of records or Information Book)

Value/skip instructions:<1-3> if NUMHOUSE gt 1 goto RESPINFO  else go to EFFCHG |
| BACK section | EFFCHG | Delete question. | \* Did the respondent’s level of effort increase, decrease, or stay the same during this interview?1. Increased
2. Decreased
3. Stayed the same
4. Don’t know for sure

Value/skip instructions:<1-2> go to CHGPNT<3-4> if NUMHOUSE gt 1 go to RESPINFO else go to DONE | Delete question. |
| BACK section | CHGPNT | Delete question. | \* At about what point(s) in this interview did the respondent’s level of effort change?1. Within the first 15 minutes
2. 15 to 30 minutes into the interview
3. 30 to 45 minutes into the interview
4. 45 to 60 minutes into the interview
5. At a specific section, specify
6. Other, specify

Value/skip instructions:<1-4> if NUMHOUSE gt 1 go to RESPINFO,  else go to DONE<5> go to CHGST\_SP<6> go to CHG\_SP | Delete question. |
| BACK section | CHGST\_SP | Delete question. | \* Which section?1. Section 1 General Housing Characteristics
2. Section 2 Rented Living Quarters
3. Section 3 Owned Living Quarters
4. Section 4 Utilities and Fuels for Owned and Rented Properties
5. Section 5 Construction, Repairs, Alterations and Maintenance of Property
6. Section 6 Appliances, Household Equipment, and Other Selected Items
7. Section 7 Household Item Repairs and Service Contracts
8. Section 8 Household Furnishings and Related Household Items
9. Section 9 Clothing
10. Section 10 Rented and Leased Vehicles
11. Section 11 Owned Vehicles
12. Section 12 Vehicle Maintenance, Repair and Operating Expenses
13. Section 13 Non-Health Insurance
14. Section 14 Hospitalization and Health Insurance
15. Section 15 Medical Expenses and Reimbursements
16. Section 16 Educational Expenses
17. Section 17 Subscriptions, Memberships and Entertainment Expenses
18. Section 18 Trips and Vacations
19. Section 19 Miscellaneous Expenses and Contributions
20. Section 20 Expense Patterns for Food, Beverages and Other Selected Items
21. Section 21 Credit Card Balances
22. Section 22 Work Experience and Income

Value/skip instructions:<1-22> if NUMHOUSE gt 1 go to RESPINFO,  else go to DONE | Delete question. |
| BACK section | CHG\_SP | Delete question. | \* Specify: Value/skip instructions: <30 char> if NUMHOUSE gt 1 go to RESPINFO else go to DONE | Delete question. |
| BACK section | INFOQUAL | Change skip instructions. | \* How would you rate the quality of the information obtained in this interview?1. No problems at all
2. A few problems, but overall quality good
3. A number of problems, but overall acceptable
4. Many problems, overall quality open to question

Value/skip instructions:<1-4> go to RESPDIFF | \* How would you rate the quality of the information obtained in this interview?1. No problems at all
2. A few problems, but overall quality good
3. A number of problems, but overall acceptable
4. Many problems, overall quality open to question

Value/skip instructions:<1-2> go to DONE<3-4> go to INFQLSP |
| BACK section | New variable INFQLSP | New question after INFOQUAL if INFOQUAL= 3 or 4. | N/A | \* Why would you rate the quality of the information as fair or poor?Value/skip instructions:<30 char> go to DONE |
| BACK section | RESPDIFF | Delete question. | \* Did the respondent have any difficulty answering any of the questions during this interview?1. Yes
2. No

Value/skip instructions: <1> go to DIFFTYPE<2> go to DONE | Delete question. |
| BACK section | DIFFTYPE | Delete question. | \* What types of difficulty did the respondent seem to have?\* Enter all that apply, separate with commas.1. Problems remembering the expenditure item
2. Problems remembering the expenditure price
3. Problems remembering the expenditure details (e.g., date, for whom)
4. Problems understanding the question
5. Did not know the expenditure information (items, price, or details)
6. Other, specify

Value/skip instructions:<1-5> go to DIFFSECT<6> go to DIFF\_SP | Delete question. |
| BACK section | DIFF\_SP | Delete question. | \* Specify:Value/skip instructions:<30 char> go to DIFFSECT | Delete question. |
| BACK section | DIFFSECT | Delete question. | \* For which sections did the respondent seem to have the most difficulty?\* Enter up to 3, separate with commas.1. Section 1 General Housing Characteristics
2. Section 2 Rented Living Quarters
3. Section 3 Owned Living Quarters
4. Section 4 Utilities and Fuels for Owned and Rented Properties
5. Section 5 Construction, Repairs, Alterations and Maintenance of Property
6. Section 6 Appliances, Household Equipment, and Other Selected Items
7. Section 7 Household Item Repairs and Service Contracts
8. Section 8 Household Furnishings and Related Household Items
9. Section 9 Clothing
10. Section 10 Rented and Leased Vehicles
11. Section 11 Owned Vehicles
12. Section 12 Vehicle Maintenance, Repair and Operating Expenses
13. Section 13 Non-Health Insurance
14. Section 14 Hospitalization and Health Insurance
15. Section 15 Medical Expenses and Reimbursements
16. Section 16 Educational Expenses
17. Section 17 Subscriptions, Memberships and Entertainment Expenses
18. Section 18 Trips and Vacations
19. Section 19 Miscellaneous Expenses and Contributions
20. Section 20 Expense Patterns for Food, Beverages and Other Selected Items
21. Section 21 Credit Card Balances
22. Section 22 Work Experience and Income

Value/skip instructions:<1-22> go to DONE | Delete question. |