

Overview of the Consumer Expenditure Surveys (CE)

Taylor J. Wilson
Bureau of Labor Statistics

The Society of Advancing Business Editing and Writing (SABEW)
Washington, D.C.
26 February 2019



Roadmap

- Goals of the CE
- Brief History
- Scope / Coverage
- Data Collection and Estimation
- National, Regional, and Local Publications
- New CE Products



Roadmap

- **Goals of the CE**
- Brief History
- Scope / Coverage
- Data Collection and Estimation
- National, Regional, and Local Publications
- New CE Products



The Face of the United States

- CE Surveys collect the following data:
 - ▶ Income
 - ▶ Expenditures
 - ▶ Demographics
- The only nationally representative survey to collect the complete range of all three.



Accurate and Timely Dissemination

“...disseminate high quality data that present an unbiased statistical picture of consumer expenditures for the Consumer Price Index, government agencies, and other data users, in support of a better understanding of consumer economic behavior.”



Roadmap

- Goals of the CE
- **Brief History**
- Scope / Coverage
- Data Collection and Estimation
- National, Regional, and Local Publications
- New CE Products



History and Milestones

1888-1891
First CE Survey

1901 - 1961
CE surveys are conducted
roughly every 10 years

1972
CE Diary and Interview
first collected by Census
Bureau

History and Milestones

End of 1979
CE starts annual collection

2003
CE switches to CAPI
Interview

2004
Income Imputation

History and Milestones

2013

First publication of mid-year tables; Tax Estimation

2014

New generation tables published experimentally

2017

First set of state representative weights are released

Roadmap

- Goals of the CE
- Brief History
- **Scope and Coverage**
- Data Collection and Estimation
- National, Regional, and Local Publications
- New CE Products



Scope and Coverage

- The CE is a nationwide survey designed to represent the entire U.S. civilian noninstitutionalized population.
- The U.S. Census Bureau collects CE data from consumer units (CUs) or households - people living at one address who share living expenses.
- Survey participants report dollar amounts for all non-investment purchases. Business expenses and reimbursements are excluded.

	PUMD	Tables	Databases
National	✓	✓	✓
Census Regions	✓	✓	✓
Census Divisions	✓		
Selected States	✓		
Selected MSAs	✓	✓	✓
Population Size of an Area	✓	✓	✓

Roadmap

- Goals of the CE
- Brief History
- Scope and Coverage
- **Data Collection and Estimation**
- National, Regional, and Local Publications
- New CE Products



Data Collection

- The U.S. Census Bureau collects CE data for BLS using two different surveys.

Quarterly Interview Survey	Weekly Diary Survey
<ul style="list-style-type: none">• Large purchases (e.g. appliances or automobiles) and recurring payments (e.g. Utilities)• Three month recall• Rotating panel	<ul style="list-style-type: none">• Smaller purchases (e.g. Stick of gum)• Diary is placed for two weeks• Respondents fill out diary contemporaneously with purchases

Data Collection: Interview

- Approximately 6,000 CUs or households are in the quarterly Interview Survey each quarter.
- This results in about 24,000 usable interviews each year.

"I'm from the government and I'm here to help."



Data Collection: Diary

- About 6,000 households a year are sampled for the Diary Survey.
- Each household keeps a diary for two consecutive one-week periods, yielding about 12,000 diaries a year.

U.S. DEPARTMENT OF COMMERCE
BUREAU OF ECONOMIC ANALYSIS
1600 L STREET, N.W.
WASHINGTON, D.C. 20540

Helping to understand how you live
U.S. DEPARTMENT OF COMMERCE
BUREAU OF ECONOMIC ANALYSIS

Your Daily Expenses

Help us learn about the buying habits of people in the United States

When you write down how you spend your money in this diary, you will help us understand more about the products and services that are bought by the people in the United States.

By law (Title 13, U.S. Code), we must keep your information confidential; we use it for statistical purposes only.

Please record your expenses and purchases for the following period:

Day	Date	Item	Amount
1			
2			
3			
4			
5			
6			
7			

I will return this:

If you have any questions, please call:

FILE NO./SURVEYOR'S SIGNATURE	DATE
FILE NO./SURVEYOR'S SIGNATURE	DATE

MAIL TO: BUREAU OF ECONOMIC ANALYSIS, 1600 L STREET, N.W., WASHINGTON, D.C. 20540

Estimation and Results

- Average annual expenditures are estimated using weighted means. Weights are nationally representative and are assigned to each household.
- Source data from the Interview and Diary Surveys are integrated by income and other demographic variables to create total expenditures.
- U.S. Households spent \$60,060 on average in 2017, from an after-tax income of \$63,606.

Roadmap

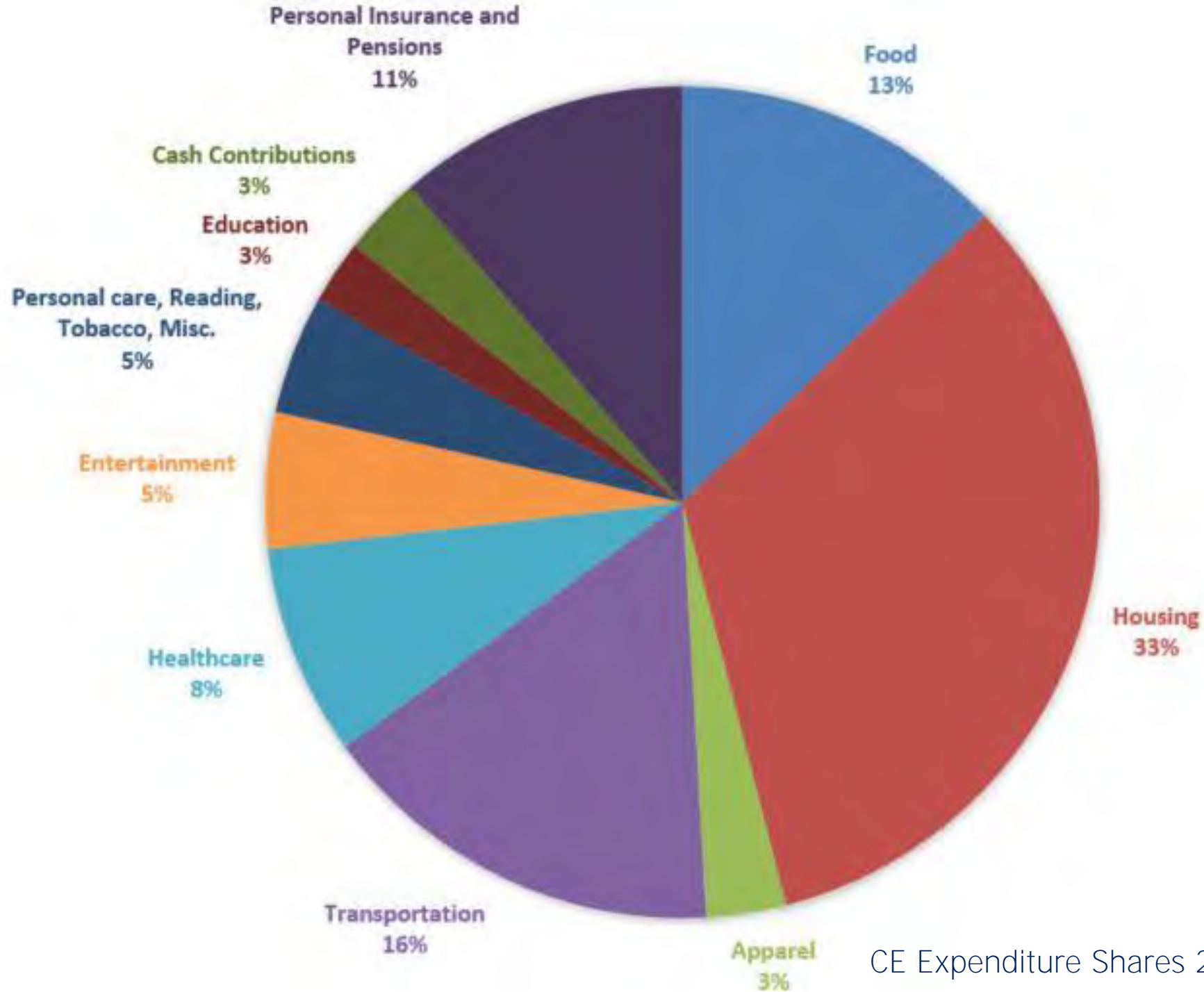
- Goals of the CE
- Brief History
- Scope and Coverage
- Data Collection and Estimation
- National, Regional, and Local Publications
- New CE Products



Publications

- Tables of national expenditures and variances published twice a year on a 12-month rolling basis.
- There are separate tables sorted by Income, Race, Hispanic Origin, Education, Family size, Age, Generation, and other key demographic variables. As well as key geographies.
- Free Public Use Microdata sets from 1996 to the present on the CE website in multiple file formats (i.e. SAS, Stata, Excel, SPSS).





CE Expenditure Shares 2017

Publications

■ New Research Articles on a regular basis

▶ BTN

[Tradeoffs in the expenditure patterns of families with children](#)

– *Evan Hubener, Arcenis Rojas, and Neil Tseng*

▶ MLR

[Fun facts about Millennials: comparing expenditure patterns from the latest through the Greatest generation](#)

– *Geoffrey Paulin*

▶ CE Report Series

[The Effects of Power Transformations on Consumer Expenditure Survey Data](#)

– *Taylor J. Wilson*

Roadmap

- Goals of the CE
- Brief History
- Scope and Coverage
- Data Collection and Estimation
- National, Regional, and Local Publications
- **New CE Products**



CE State Weights

- First test estimates produced in 2013 for three states.
- First official weights published for 2016.
- Two years of state weights are now available for FL, CA, and NJ.
- Feasibility for additional states is being investigated.



Upcoming Research Work

- Data Quality Profile
 - ▶ Additional Indicators are being investigated
- Spending by family type
- Evaluation of Owner's Equivalent Rent
- Spending on vice expenditures
- American Council on Consumer Interests (ACCI)
- American Association for Public Opinion Research (AAPOR)

Questions



Contact Information

General Information:

CE - www.bls.gov/cex

Information requests:

(202) 691-6900

CEXInfo@bls.gov



Contact Information

Taylor J. Wilson

Economist

CE Branch of Information and Analysis

202-691-6550

Wilson.Taylor@bls.gov

