



TEXAS TECH UNIVERSITY SYSTEM



## **TBD CONSUMER EXPENDITURE SURVEYS: NEW USER PERSPECTIVES**

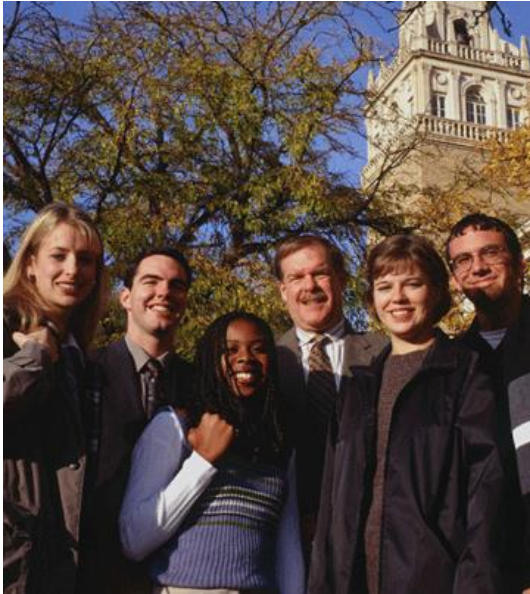
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*July 20th, 2023*



- Motivation to Use CE Dataset
- New User Experience
- Conclusion



# MOTIVATION TO USE CE DATASET

- Behavioral Finance – Dr. James Russell
  - ✓ *recognizes that human beings are not always rational when making financial decisions, prone to biases and systematic errors*
  - ✓ *seeks to provide insights into why people make certain financial choices*
  - ✓ *charitable giving: culture and upbringings – context of the contribution*
- Research Question: How cultural dimensions can impact the contribution to charity?



# MOTIVATION TO USE CE DATASET

- **Workshop registration in May**
  - ✓ *Information about individual cash contributions to different charitable organization in dataset – Hardly found in any other datasets.*
  - ✓ *Downloaded data files and overwhelmed with instructions*
- **Emailed and met with an expert – Dr. Paulin Geoffrey**
  - ✓ *Started to read and discover the dataset*
  - ✓ *Got some critical information about the dataset from the expert*
  - ✓ *Participated in July workshop*



# NEW USER EXPERIENCE

## ■ Getting the Data Files and Documents

The screenshot shows the BLS website at [www.bls.gov/cex/](http://www.bls.gov/cex/). The main navigation bar includes links for HOME, SUBJECTS, DATA TOOLS, PUBLICATIONS, ECONOMIC RELEASES, CLASSROOM, and BETA. The breadcrumb trail indicates the current location: Bureau of Labor Statistics > Consumer Expenditure Survey > Home.

### Consumer Expenditure Surveys

The page features a navigation bar with the following options: CE Home, CE Publications, CE Data, CE Methods, and About CE. The CE Data dropdown menu is open, showing the following options: Data Overview >>, Database, Geographic Data, Public Use Microdata (PUMD), and Tables. The PUMD option is highlighted.

The main content area contains the following text:

The **Consumer Expenditure Surveys (CE)** and demographic characteristics of [public use microdata files](#).

The CE program provides these data in [tables](#).

CE data are collected by the Census Bureau from households and businesses that purchase major and/or recurring items and the frequently purchased items. CE data are primarily used to measure the expenditures on goods and services in the market basket.

The CE is the only Federal household survey that provides information on consumers' expenditures and income [program and its methods](#).

To be notified when new datasets become available, sign up for [CE updates](#). The menu will prompt you to select Consumer Expenditure Survey questions about this page and its contents, [contact us](#).

#### NOTICES

- » Registration is open for the CE Public Use Microdata Workshop (July 18–20, 2023) [Read More »](#)
- » Beyond the Numbers: Four personal tax liabilities trends that have emerged from recent tax legislation (5/30/2023) [Read More »](#)
- » The 2022 midyear public use microdata and Data Quality Profile are now available. (5/04/2023) [Read More »](#)

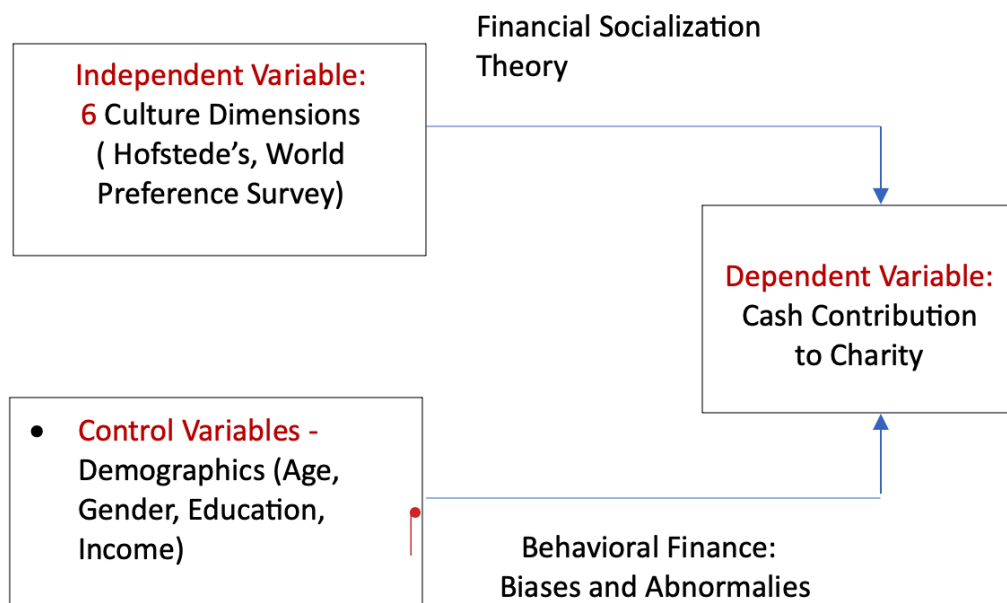


# NEW USER EXPERIENCE

## ■ Important Files

- **CE PUMD Getting Started Guide (PDF)**
- **Dictionary for Interview and Diary Survey (XLSX)**
- Questionnaires
- Data Files in zip CVS or STATA

### Theoretical Framework:



## ■ Personal Interested Variables

- Cash contributions to religious, educational, charitable, or political organizations.
- Races and Ethnicity – divided into country of origin – merged with other dataset about the Culture Dimensions (Hofstede, World Preference Survey)
- Other demographic variables: age, family size, education ...



# NEW USER EXPERIENCE

- ❑ Different data files: Interview (monthly, quarterly, annually) and Dairy (weekly, quarterly) Surveys
  - ❑ Different data files for CU (consumer unit) level data and for member level data in Interview Survey → using dictionary to find the codes
    - FMLI - CU Level data: Summary of expenditure, income, assets, liabilities
      - Total cash contribution of the whole quarter – CU level
      - Race of 2 main members in the CU - E.g. Reference person – Spouse (Mexican – Mexican)
    - MTBI – Monthly Expenditure – CU level
      - Cash Contribution for each purposes (cash to charity organization, churches, to educational organization...) at monthly amount → Calculated yearly
    - MEMI – Member level data – Characteristics, member income ...
      - Race, demographics of members in CU → merged with another dataset
- All the data files are connected by Member ID number



# CONCLUSION

- ❑ Advantages of CE data: rich source of information about consumer finance, actual expenses, continuous variables, yearly data
- ❑ Disadvantages of CE data: different files per year, survey time vs. calendar year, consumer unit vs. member data, questionnaire revisions, many coding and variables.
- ❑ Suggested solutions for new users:
  - ✓ Understand the main purposes of each surveys and data files.
  - ✓ Extract some basic data first after reading the getting started guide.
  - ✓ Workshops and experts are important to understand and dive into the dataset.





Thank you for your attention!

Q&A

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