

# Web Diary Feasibility Test: Preliminary Findings and Issues

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Census Bureau

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# Web Diary Team Overview

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## Mission

- ▶ Testing the feasibility and impact of using a web diary to collect Consumer Expenditure Diary expenditures.

## Objective

- ▶ To understand the operational issues regarding implementing a web mode for CE and to understand the data quality and response rates associated with web collection for CE.

# Presentation Outline

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- I. Web Diary Logistics
- II. Web Diary Instrument
- III. Web Diary Materials and Training
- IV. Early Results

# **I. WEB DIARY LOGISTICS**

# Web Diary Logistics

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- Data Collection Period – Jan, Feb, Mar 2013
- Test Closeout – Apr 30, 2013
- Starting Sample Size – 1,300 (Nationwide, less HI/AK)
- FR Workload – Approximately 2-3 extra cases/mo. per FR

# Web Diary Logistics

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- Separate online WD application (ASD)
- Separate CAPI instruments (test input files utilize research flag, interview period)
- Debriefing Qs (for both R and FR)
- Naming conventions developed for:
  - ▶ ASD production input files
  - ▶ ASD Web Data output / MCS CAPI Data output
  - ▶ NPC Web/CAPI data for Visual Basic keying

# Web Diary Logistics

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- All research cases are “double placed”
- FRs provide username and password to Respondent via CAPI instrument
- New outcome codes for Web Diary
- New materials
  - ▶ FR Talking Points (FR)
  - ▶ User Guide (FR)
- Test Limitations
  - ▶ English only
  - ▶ No Multi-CU HHs or Replacement HHs
  - ▶ No Reinterview

# Web Diary Flow of Data

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- Web Data delivered to DSD from ASD
  - ▶ Weekly (every Monday, 12:00am)
  - ▶ Cumulative, flat ASCII file
- Web Data delivered from DSD to NPC for keying
  - ▶ Weekly, Tuesday afternoon
  - ▶ CEPB unduplicates for Case IDs already sent to NPC in prior weeks
- CAPI Recall Data delivered from DSD to NPC
  - ▶ Monthly, five working days after closeout
  - ▶ Converted to same file structure as Web Data for NPC read-in
- NPC delivers keyed Web and CAPI data to DSD
  - ▶ DSD merges files and converts to SAS datasets per BLS specification
  - ▶ DSD conducts parallel data review and releases data to BLS



## **II. WEB DIARY INSTRUMENT**

# Web Diary CAPI Instrument

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- Screener Qs for both research and production
  - HM\_NET – “Does this household have internet access at home?”
  - EM\_ACCS – “Is this through... (PC, tablet, mobile phone)?”
- Username and Password populated on “placement” screen
- “Web” placed as a fill before “Diary” on respective CAPI screens.
- Identical CAPI instrument used for both research and production cases

# Web Diary CAPI Instrument

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- Additional interviewer instructions serve as cues for FRs
- In order to facilitate the collection of receipts as well as recalled data, a recall/receipts tab added for final pickup to allow for FR data entry
- Additional outcome codes created to:
  - Separately identify research vs. production cases
  - Prevent additional programming for ROSCO

# **III. WEB DIARY MATERIALS AND TRAINING**

# Training Materials

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- Training materials (both R and FR)
- Two Training documents:
  - ▶ “Consumer Expenditure Diary Survey User Guide”
  - ▶ “FR Talking Points”

# Consumer Expenditure Diary Survey User Guide

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- The Survey User Guide was designed as a reference guide for respondents.
- The User Guide provided instructions on
  - ▶ URL for the Web Diary
  - ▶ Username and Password
  - ▶ Start date for entering expenses
  - ▶ Creating a household roster
  - ▶ Contacting the FR and Regional office with questions and other concerns

# Consumer Expenditure Diary Survey User Guide

## Consumer Expenditure Diary Survey— User Guide

FILED 10-10284 (6/2012)

**Thank you** for agreeing to participate in the Consumer Expenditure Survey (CE). We understand that this task takes time; however, your information is very important to us and will be used for many purposes that affect all Americans. Among the most important, it is used to help calculate the Consumer Price Index, or CPI, which is a basic measure of the rate of inflation. For more information about the survey, visit: <http://www.bls.gov/ce> and <http://www.census.gov>.

By law (Title 13, U.S. Code), we must keep your information confidential; we use it for statistical purposes only. If you have comments regarding this survey, please send them to: *Division of Consumer Expenditure Surveys, 2 Massachusetts Avenue N.E., Room 3985, Washington, DC 20212.*

**The CE Web Diary can be accessed at:**  
<http://respond.census.gov/ced/>.

Your **username:** \_\_\_\_\_  
Your **password:** \_\_\_\_\_

On this screen you enter the names of the people in your household and your survey Start Date.

Your **Start Date** is: \_\_\_\_\_

Your **Household Members:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

United States Census Bureau  
CONSUMER EXPENDITURE DIARY SURVEY

Login

• **Log in:** Use your username and password to log in and click the "Login" button.  
Username and Password are case sensitive.

Username:  Password:

[Forgot username?](#) [Forgot password?](#)

Please note: sessions will expire (requiring you to log back in) after 15 minutes of inactivity. No data will be lost.

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United States Census Bureau  
CONSUMER EXPENDITURE DIARY SURVEY

About the Survey Help User Guide

Household Roster and Start Date

1. Please enter the names of the people in your household that are listed on the back of your instruction card. You will record the purchases and expenses made by ALL of these people.

1.		7.	
2.		8.	
3.		9.	
4.		10.	
5.		11.	
6.		12.	

2. Select the start date you are scheduled to begin entering expenses into your Diary.

Month:  Day:

Any changes to the roster after you leave this page will not be saved.

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# Consumer Expenditure Diary Survey User Guide

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- ▶ **How and where to enter expenses**
  - **Food and Drink Away From Home**
  - **Food and Drink for Home Consumption**
  - **Clothing, Shoes, Jewelry and Accessories**
  - **All Other Products and Services**
- ▶ **How to save work and add rows**
- ▶ **How to submit completed Web Diary expenses**



# Consumer Expenditure Diary Survey User Guide

Food and Drink Away from Home    Food and Drink for Home Consumption    Clothing, Shoes, Jewelry, and Acc.    All Other Products/Services

Meal Type	Description	Where Purchased	Total Cost with tax and tip	Alcohol Included? (Check all that apply) Wine Beer Other	Total Alcohol Cost	Date Purchased	Clear
Breakfast	bagel, juice	Employer or School Cafeteria	\$2.79	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-14-2011	-
Lunch	pizza	Fast Food, Take-out Counter	\$5.57	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-14-2011	-
Snack/Other	coffee	Fast Food, Take-out Counter	\$1.35	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-14-2011	-
Lunch	sandwich, soda	Employer or School Cafeteria	\$5.15	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-14-2011	-
Dinner	chips	Vending Machines or Vending	\$ .70	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-15-2011	-
Lunch	elem. school lunch - mon	Employer or School Cafeteria	\$45.00	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-15-2011	-
Snack/Other	soda	Vending Machines or Vending	\$ .65	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		03-21-2011	-
Dinner	buffet	Full Service Places	\$62.23	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$12.00	03-23-2011	-
Snack/Other	drinks from cash bar	Full Service Places	\$15.00	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	\$15.00	03-23-2011	-
Dinner	caterer-Family Reunion	Fast Food, Take-out Counter	\$350.00	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$95.00	03-24-2011	-

Add Rows    Save

# Consumer Expenditure Diary Survey User Guide

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- ▶ How and where to enter expenses
  - Food and Drink Away From Home
  - Food and Drink for Home Consumption
  - Clothing, Shoes, Jewelry and Accessories
  - All Other Products and Services
- ▶ **How to save work and add rows**
- ▶ How to submit completed Web Diary expenses

# Consumer Expenditure Diary Survey User Guide

When you navigate from one section of the diary to the next, your purchases will automatically be saved. You may also click **Save** at the bottom of the page at any time.

United States Census Bureau

CONSUMER EXPENDITURE DIARY SURVEY

About the Survey Help User Guide

Submit Logout

Please report expenses for these people in your household:  
John Doe

Your data is about to be saved and submitted. You may change your responses at any time. Please remember to report your expenses daily. Thank you.

OK Cancel

Meal Type	Description	Where Purchased	Total Cost with tax and tip	Alcohol consumed (Check all that apply) Wine Beer Other	Total Alcohol Cost	Date Purchased	Clear
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Select One	X

Add Rows Save

At the end of your 2-week record keeping period, you will submit your expenditures using the **Submit** button at the top of the page. You may still access your web diary after you hit **Submit**.

I will return on \_\_\_\_\_ to complete the interview.

**If you have any questions, please call:**

Regional Office: \_\_\_\_\_

Telephone: \_\_\_\_\_

# Consumer Expenditure Diary Survey User Guide

Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	-
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	-
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	-
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	-
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	-


**Add Rows** **Save**

# Consumer Expenditure Diary Survey User Guide

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- ▶ How and where to enter expenses
  - Food and Drink Away From Home
  - Food and Drink for Home Consumption
  - Clothing, Shoes, Jewelry and Accessories
  - All Other Products and Services
- ▶ How to save work and add rows
- ▶ **How to submit completed Web Diary expenses**

# Consumer Expenditure Diary Survey User Guide



CONSUMER EXPENDITURE  
DIARY SURVEY

[About the Survey](#)[Help](#)[User Guide](#)

[Submit](#)[Logout](#)

Please report expenses for these people in your household:  
**John Doe**

[Food and Drink Away from Home](#)[Food and Drink for Home Consumption](#)[Clothing, Shoes, Jewelry, and Acc.](#)[All Other Products/Services](#)

Meal Type	Description	Where Purchased	Total Cost with tax and tip	Alcohol Included? (Check all that apply)			Total Alcohol Cost	Date Purchased	Clear
				Wine	Beer	Other			
Breakfast	coffee	Employer or School Ce	\$1.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		10-22-2012	X
Breakfast	fruit cup	Employer or School Ce	\$2.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		10-24-2012	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X
Select One		Select One		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Select One	X

[Add Rows](#)[Save](#)

[Burden Statement](#)[Accessibility](#)[Privacy](#)[Security](#)

# FR Talking Points

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- For the Census FRs, the Web Diary Team created
  - FR Talking Points
- Similar in nature to the User Guide created for respondents
- The FR Talking Points also reminded FRs to emphasize to respondents which expenses not to record in the Web Diary
- The primary goal of the FR Talking Points was to provide a resource to FRs to thoroughly explain the Web Diary instructions to the respondent

# FR Talking Points

FEB/10-10/284 (7/16/2012)

## Logging in to the Web Diary

### Username and Password

Your first login to the CE Web Diary requires a unique secure **Username** that is assigned to each household in our study.

Enter your Username in the field after "Username" located in the middle of the screen at the Web Diary welcome page. Be sure to enter the Username exactly as it is written since it is case-sensitive. Enter your Password in the field after "Password."

1. (Point out the Username field on the user guide.)
2. (Point out the Password field on the user guide.)

**Note:** It will be helpful to bookmark the URL for the CE Web Diary. This will make it easier to access each day as you are entering purchases.

### Roster Creation

On this screen you will enter the names of all of the people in your household that don't have another residence where they usually stay. These names will then appear on the Web Diary data entry page as a reminder of the people to keep in mind when recording purchases for all household members.

Note that you only have to do this once and will not be able to change the roster once it is created.



# Training -Web Diary VTC

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- Video teleconference (VTC) was held at the end of November 2012
  
- HQ virtual presentation to all Regional Offices
  - ▶ Background and Overview of WD Feasibility Test
  - ▶ Logistics and CAPI Instrument Changes
  - ▶ Walk-through of the Web Instrument
  - ▶ Question and Answer session

# Training- Web Diary Self-Study

- FR training incorporated into November 2013 Refresher Training
- FRs had 4 hours to review materials (Self-study)
  - ▶ Introduction and Summary
  - ▶ Web instrument data entry
  - ▶ Practice interviews
- Each FR given
  - ▶ Unique username and password to log-into diary for independent walk-through
  - ▶ Respondent User Guide
  - ▶ FR Talking Points

## **IV. EARLY RESULTS**

# Web Diary Operational Issues

- No centralized “help desk” for respondents
  - ▶ Respondents were instructed to call (800) # as a direct line to DSD staff
    - General inquiries or surveys questions handled by Regional Office CE staff (or FRs)
    - Other technical issues, comments, or complaints forwarded to FSB via phone or email
    - 53 calls related to username/password issues, log-in after closeout, etc.
- DSD routed all non-password-related technical issues to ASD
  - ▶ Both FSB and DSD maintain Web Diary Issues Database for tracking and documentation

# January Web Diary Sample Performance

- Response Rate – 50.91%
- 3-Month Projection – 706 Completed Diaries
- Screened Out Cases (no internet access/language barriers) – 98 Cases

Sample Size (diaries)	440	100.00%
Completes (diaries)	224	50.91%
Refusals (diaries)	216	49.09%
Target Completes (diaries)	333	---

# Web Diary Respondent Compliance

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## ■ Web Diary Failed Log-ins

- ▶ Defined as a placed diary where respondent failed to log into the instrument
- ▶ 38 out of 113 cases – 33.63%
- ▶ Receipt and recall data

## ■ Average Number of Diary Entries per Week

- ▶ Web Diary (not including recall data) – 23.39 mean diary entries per week
- ▶ Production Diary (not including recall data) – 31.60 mean diary entries per week

# Web Diary FR Focus Group

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- Three focus group sessions consisting of a sample of FRs
  - ▶ Self-study training
  - ▶ Respondent materials
  - ▶ Help desk hotline
  - ▶ FR monitoring procedures
  - ▶ Save/submit procedures
  - ▶ Receipt and recall collection procedures
  - ▶ Favors younger and more tech-savvy respondents

# Overall Results

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- Encouraging results
- Concerns
- Next steps



# Acronym Definitions

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- WD – Web Diary
- FR – Field Representative
- R – Respondent
- CU – Consumer Unit
- HH - Household
- CAPI – Computer-assisted Personal Interviewing
- MCS – Master Control System
- FSB – Financial Surveys Branch
- CEPB – Consumer Expenditure Programming Branch
- DSD – Demographic Surveys Division
- ASD – Application Support Division
- NPC National Processing Center
- ROSCO – Regional Office Survey Control

# Contact Information

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