
United States Department of Labor
Bureau of Labor Statistics

ICPSR 2796
CONSUMER EXPENDITURE SURVEY, INTEGRATED DIARY AND INTERVIEW SURVEY DATA, 1984-1996

(ICPSR 2796)

Principal Investigator

United States Department of Labor
Bureau of Labor Statistics

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DATA DISCLAIMER

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DATA COLLECTION DESCRIPTION

CONSUMER EXPENDITURE SURVEY, INTEGRATED DIARY AND INTERVIEW SURVEY DATA, 1984-1996 (ICPSR 2796)

SUMMARY: This collection contains data integrated from the two components of the Consumer Expenditure Survey, the Diary Survey and the quarterly Interview Survey, for the years 1984-1996. The integrated data provide a complete accounting of consumer expenditures and income, which neither component alone is designed to do. For the Diary Survey, consumer units complete a diary of expenses for two consecutive one-week periods. The diary survey is designed to obtain data on frequently purchased items, such as food and beverages, housekeeping supplies, etc., that respondents are less likely to recall over longer periods of time. For the Interview Survey, consumer units report information to an interviewer once every three months for five consecutive quarters. This survey is designed to obtain data on expenditures and income that respondents can be expected to recall for a period of three months or longer, such as property or automobile purchases, and those that occur on a regular basis, such as rent, utility bills, and insurance premiums. The standard tables include age of reference person, composition of the consumer unit, size of the consumer unit, number of earners in the consumer unit, income before taxes, occupation, quintiles of income before taxes, housing tenure, race, type of area (urban-rural), and region of residence. There are also cross-tabulated tables that include age by income, consumer unit size by income, region by income before taxes, Metropolitan Statistical Areas by the four census regions, and single persons by age and by income.

UNIVERSE: Noninstitutional civilian population of the United States.

SAMPLING: National probability sample of households designed to represent the total noninstitutional civilian population.

NOTE: (1) The data were supplied as tabular Lotus 1-2-3 files, which ICPSR converted to ASCII text files. (2) Part 289, Documentation for All Parts, contains an introduction to the data, descriptions of the files, and a glossary of terms. It is a combination of three text files (readme.dsk, filename, glossary) that came with the original Lotus tables, and it reflects the original Lotus 1-2-3 spreadsheet file format. (3) Starting in 1991, the expenditure line "Other Lodging" was redefined. The item "Expenses for Other Properties" was extracted from "Other Lodging" and placed with "Miscellaneous" expenditures. The 1990 tables were retabulated to reflect this change. Part 288, Expenses for Other Properties by Consumer Unit Characteristics, 1987, 1988, and 1989, shows expenses for other properties, by consumer unit characteristics, for the years 1987, 1988, and 1989, and can be used to adjust the earlier years for comparisons with 1990 and later years. (4) Part 289, Documentation for All Parts, is provided as a Portable Document Format (PDF) file. The PDF file format was developed by Adobe Systems Incorporated and can be accessed using PDF reader software, such as the Adobe Acrobat Reader. Information on how to obtain a copy of the Acrobat Reader is provided through the ICPSR Website on the Internet.
EXTENT OF COLLECTION: 288 data files + machine-readable documentation (PDF)

EXTENT OF PROCESSING: REFORM.DATA/REFORM.DOC

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Record Length: 67 to 229 per part

Part 289: Documentation for All Parts (PDF)
DESCRIPTION
The diskette(s) contains data integrated from the two components of the Consumer Expenditure Survey of the Bureau of Labor Statistics, U.S. Department of Labor. The two components are the Diary survey and the quarterly Interview survey. The integrated data provide a complete accounting of consumer expenditures and income which neither component alone is designed to do. For the Diary survey, consumer units complete a diary of expenses for two consecutive 1-week periods. It is designed to obtain data on frequently purchased items such as food and beverages, housekeeping supplies, etc., that respondents are less likely to recall over longer periods of time. For the Interview survey, consumer units report information to an interviewer once every 3 months for 5 consecutive quarters. It is designed to obtain data on expenditures and income that respondents can be expected to recall for a period of 3 months or longer, such as property or automobile purchases, and those that occur on a regular basis, such as rent, utility bills, or insurance premiums. Data on these files are for the total population (urban and rural).

USES OF THE SURVEY
The survey data are of value to government and private agencies interested in studying the welfare of particular segments of the population, such as the aged, low-income families, urban and rural families, and those receiving food stamps. The survey data are used by economic policy makers interested in the effects of policy changes on levels of living among diverse socioeconomic groups. Econometricians find the data useful in constructing economic models. Market researchers find them valuable in analyzing the demand for groups of goods and services. The Department of Commerce uses the survey data as a source of information for revising its benchmark estimates of some of the personal consumption expenditure components of the gross national product.

As in the past, the revision of the Consumer Price Index remains a major reason for undertaking such an extensive survey. The results of Consumer Expenditure Surveys are used to select new market baskets of goods and services for the index, to determine the relative importance of the items selected, and to derive new cost weights for the baskets.
FILES
The diskette(s) contains the data you requested. The data files are organized within subdirectories. For instance, the data files for 1996 (standard characteristics) are placed in the "1996" subdirectory. The data set naming convention represents the data by characteristics, such as "AGE.WK1" for age of reference person, or "CUCOMP.WK1" for composition of the consumer unit. Cross tabulated data set names always begin with an "X". Hence, the file name for consumer units residing in the northeast region and classified by income is "XREGNNE.WK1". For all Lotus data files, the file name extension is "WK1". ASCII data files have the extension "PRN".

To further aid the user, the file FILENAME.TXT contains a list of all file names and their descriptions. Note that this list may include names of files that you have not purchased.

A file containing the Consumer Expenditure Survey glossary has been included, and is named GLOSSARY. The README file contains a description of the survey and file information.

*** NOTE TO MULTI-YEAR DISKETTE USERS ***
Starting in 1991, the expenditure line "Other lodging" has been redefined. The item "Expenses for other properties" (maintenance, repairs, utilities, insurance, interest paid on mortgage and property taxes on other properties) has been extracted from "Other lodging" and placed in "Miscellaneous" expenditures. The 1990 tables have been re-tabulated to reflect this change. The file PROP8789 (an ASCII file) has been included on your diskette. This file shows expenses for other properties, by consumer unit characteristics, for the years 1987, 1988, and 1989, and thus can be used to adjust the earlier years for comparisons with 1990 and later years.

*** NOTE ON 1994 DISKETTE DATA ***
The 1994 tabulated (diskette) data were revised in 1997. Therefore, some estimates from the current 1994 tables will not match estimates from the initial release. Changes in the mean estimates of the affected items are minimal.

For further information, contact:
John Rogers (202) 606-6900
This file contains diskette file names of Consumer Expenditure Data stored within subdirectories. File names listed here show the extension WK1 for Lotus 1-2-3 formatted files.

Standard Tables:

  AGE.WK1 - Age of reference person
  CUCOMP.WK1 - Composition of consumer unit
  CUSIZE.WK1 - Size of consumer unit
  EARNERS.WK1 - Number of earners in consumer unit
  EDUCAT.WK1 - Education of reference person *
  INCOME.WK1 - Income before taxes
  OCCUP.WK1 - Occupational group of reference person *
  ORIGIN.WK1 - Origin of reference person *
  QUINTILE.WK1 - Quintiles of income before taxes
  REGION.WK1 - Region of residence
  TENRACAR.WK1 - Housing tenure, Type area, Race, and Origin *

* Not available or modified in some years.

Cross-tabulated tables:

Age by income cross-tabulated:
  Subdirectory--XTABAGE.

  XUNDER25.WK1 - Before tax income by reference person under age 25
  X25TO34.WK1 - Before tax income by reference person age 25 to 34
  X35TO44.WK1 - Before tax income by reference person age 35 to 44
  X45TO54.WK1 - Before tax income by reference person age 45 to 54
  X55TO64.WK1 - Before tax income by reference person age 55 to 64
  X65ORUP.WK1 - Before tax income by reference person age 65 or over

Consumer Unit Size by income cross-tabulated:
  Subdirectory--XTABSIZE.

  XONE.WK1 - Before tax income by one person consumer units
  XTWOORUP.WK1 - Before tax income by two or more person consumer units
  XTWO.WK1 - Before tax income by two person consumer units
  XTHREE.WK1 - Before tax income by three person consumer units
  XFOUR.WK1 - Before tax income by four person consumer units
  XFIVORUP.WK1 - Before tax income by five or more person consumer units

Region by income cross-tabulated:
  Subdirectory--XTABREGN.

  XREGNNE.WK1 - Before tax income by Northeast region
  XREGNMW.WK1 - Before tax income by Midwest region
  XREGNS.WK1 - Before tax income by South region
  XREGNW.WK1 - Before tax income by West region
Metropolitan Statistical Areas (tabulated by the four Census Regions):
Subdirectory--MSA.

MIDWEST.WK1 - Selected MSA's, Midwest Region
NORTHEAS.WK1 - Selected MSA's, Northeast Region
SOUTH.WK1 - Selected MSA's, South Region
WEST.WK1 - Selected MSA's, West Region

Single persons by gender cross tabulated by age and income:
Subdirectory--GENDER.

MALESAGE.WK1 - Single men by age
FEMALAGE.WK1 - Single women by age
MALESINC.WK1 - Single men by income
FEMALINC.WK1 - Single women by income

*** NOTE ON 1994 DISKETTE DATA ***
The 1994 tabulated (diskette) data were revised in 1997. Therefore, some estimates from the current 1994 tables will not match estimates from the initial release. Changes in the mean estimates of the affected items are minimal.
Glossary:

This glossary is divided into four sections: 1. Characteristics, 2. Expenditures, 3. Income and personal taxes, and 4. Other financial information.

1. Characteristics

Age. The age of the reference person.

Complete income reporters. The distinction between complete and incomplete income reporters is based in general on whether the respondent provided values for major sources of income, such as wages and salaries, self-employment income, and Social Security income. Even complete income reporters may not have provided a full accounting of all income from all sources. In the current survey, across-the-board zero income reporting was designated as invalid, and the consumer unit was categorized as an incomplete reporter. In all tables, income data are for complete income reporters only.

Composition of consumer unit. The classification of interview families according to: (1) relationship of other family members to the reference person; (2) age of the children to the reference person; and (3) combination of relationship to the reference person and age of the children. Stepchildren and adopted children are included with the reference person's own children.

Consumer unit. A consumer unit comprises either: (1) all members of a particular household who are related by blood, marriage, adoption, or other legal arrangements; (2) a person living alone or sharing a household with others or living as a roomer in a private home or lodging house or in permanent living quarters in a hotel or motel, but who is financially independent; or (3) two or more persons living together who pool their income to make joint expenditure decisions. Financial independence is determined by the three major expense categories: Housing, food, and other living expenses. To be considered financially independent, at least two of the three major expense categories have to be provided by the respondent.

Earner. A consumer unit member, 14 years of age or older, who reported having worked at least 1 week during the 12 months prior to the interview date.

Education of reference person. The number of years of formal education of the reference person on the basis of the highest grade completed. If enrolled at time of the interview, the grade being attended is the one recorded. Persons not reporting the extent of their education are classified under no school or not reported.

Housing tenure. The family's principal place of residence during the survey. "Owner" includes families living in their own homes, cooperatives or condominium apartments, or townhouses. "Renter" includes families paying rent as well as families living rent free in lieu of wages.

Income before taxes. The total money earnings and selected money receipts during the 12 months prior to the interview date. See section 3 of this glossary for a complete definition of the components.
Income after taxes. Income before taxes less personal taxes which include federal income taxes, state and local taxes, and other taxes. See section 3 of this glossary for a complete definition of the components.

Metropolitan Statistical Areas (MSA's). The general concept of an MSA and an SMSA is one of a large population nucleus, together with adjacent communities which have a high degree of economic and social integration with that nucleus. These are defined by the Office of Management and Budget as a standard for Federal agencies in the preparation and publication of statistics relating to metropolitan areas. The term MSA went into effect June 30, 1983, replacing the term SMSA; however, the Consumer Expenditure Survey collection process followed the old definition through 1985. Since 1986, the collection process has followed the new definition of an MSA.

Number of vehicles owned. The number of automobiles, trucks, vans, campers, motorcycles, trailers, and planes owned by members of the consumer unit, including vehicles used partially for business, but excluding those used entirely for business.

Occupation. Refers to the occupation in which the reference person received the most earnings during the survey period. The occupational categories follow those of the Census of Population. Categories shown in the reference tables include the following:

Self-employed--encompasses all occupational categories; the reference person is self-employed in own business, professional practice, or farm.

Wage and salary earners:

Managers and professionals--executives, administrators, and managers; and professional specialties, including architects, engineers, natural and social scientists, lawyers, teachers, writers, health diagnosis and treatment workers, entertainers, and athletes.

Technical, sales, and clerical workers--technicians and related support workers; sales representatives, sales workers, cashiers, and sales-related occupations; and administrative support, including clerical.

Service workers--private household workers, protective services, food preparers, health services, cleaning and building services, and personal service occupations.

Precision production, craft, and repair workers--mechanics and repairers, construction trades, extractive occupations, and precision production occupations.

Operators, fabricators, and laborers--machine operators and assemblers, transportation workers, handlers and laborers, and farming, forestry, and fishery workers.

Retired--retired persons who did not work either full- or part-time during the survey period.
All others, including not reporting—a residual including unemployed persons, those working without pay, those not working due to illness, going to school, or caring for others, and those not reporting their occupational status.

Population. The total civilian noninstitutional population of the United States as well as that portion of the institutional population living in the following group quarters: Boarding houses, housing facilities for students and workers, staff units in hospitals and homes for the aged, infirm, or needy, permanent living quarters in hotels and motels, and mobile home parks. Excluded are military personnel living on military bases and nursing home residents.

Quintiles of income before taxes. For each time period represented in the tables, complete income reporters are ranked in ascending order according to the level of total before-tax income reported by the consumer unit. The ranking is then divided into five equal groups. Incomplete income reporters are not ranked and are shown separately.

Race. The race of the reference person of the consumer unit. All families are included in two racial groups, black and "white and other." The "other" group comprises such races as American Indians, Alaskan natives, Asians, and Pacific Islanders.

Reference person. The first member mentioned by the respondent when asked to "Start with the name of the person or one of the persons who owns or rents the home." It is with respect to this person that the relationship of the other consumer unit members is determined.

Regions. Data are presented for four major regions: Northeast, Midwest, South, and West. Consumer units are classified by region according to the address at which the family was residing during the time of their participation in the survey. The regions comprise the following States:


Midwest -- Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

South -- Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.


Rural population. All persons living outside of a Metropolitan Statistical Area (MSA) and within an area with a population of less than 2,500 persons. See the definition for Urban population below.

Size of the consumer unit. The number of persons whose usual place of residence at the time of the interview is in the sample unit.
Standard Metropolitan Statistical Areas (SMSA's). See definition under Metropolitan Statistical Areas (MSA's).

Urban population. All persons living in Metropolitan Statistical Areas (MSA's) and in urbanized areas and urban places of 2,500 or more persons outside of MSA's. Urban, defined in this survey, includes the rural populations within an MSA.

2. Expenditures

Expenditures consist of the transaction costs, including excise and sales taxes, of goods and services acquired during the interview or recordkeeping period. Expenditure estimates include expenditures for gifts, but exclude purchases or portions of purchases directly assignable to business purposes. Also excluded are periodic credit or installment payments on goods or services already acquired. The full cost of each purchase is recorded even though full payment may not have been made at the date of purchase. The order of the expenditures listed here follows the order of presentation in the reference tables.

Food

Food at home refers to the total expenditures for food at grocery stores or other food stores and food prepared by the consumer unit on trips. It excludes the purchase of nonfood items.

Cereals and cereal products includes ready-to-eat and cooked cereals, pasta, flour, prepared flour mixes, and other cereal products such as cornmeal, corn starch, and rice.

Bakery products includes bread (white and other than white), crackers and cookies, biscuits and rolls, cakes, cupcakes, bread and cracker products, pies, tarts, sweet rolls, coffeeecakes, doughnuts, and other frozen and refrigerated bakery products such as cookies, bread and cake dough, and batter.

Beef includes ground beef, roasts, steaks, veal, and other cuts of beef, excluding canned beef.

Pork includes bacon, pork chops, ham (including canned), roasts, sausage, and other cuts of pork.

Other meats includes frankfurters; lunch meats such as bologna, liverwurst, and salami; also lamb, mutton, goat, game, and organ meats.

Poultry includes fresh and frozen chickens and other fresh and frozen poultry (Cornish hens, turkey, duck, etc.).

Fish and seafood includes canned fish and seafood and fresh or frozen finfish and shellfish.

Eggs includes fresh eggs as well as powdered eggs and egg substitutes.

Fresh milk and cream includes fresh whole milk and other fresh milk such as buttermilk and fresh cream (including table cream, whipping cream, fresh sour cream, and fresh sour cream dressing).
Other dairy products includes butter, cheese, ice cream products, yogurt, powdered milk, condensed and evaporated milk, liquid and powdered diet beverages, malted milk, milk shakes, chocolate milk, and other specified dairy products.

Fresh fruits includes all fresh fruits.

Fresh vegetables includes all fresh vegetables.

Processed fruits includes all frozen fruits and fruit juices, canned and dried fruits, and canned or bottled fruit juices.

Processed vegetables includes canned, dried, and frozen vegetables, and vegetable juices.

Sugar and other sweets includes sugar, candy and chewing gum, artificial sweeteners, jams, jellies, preserves, fruit butters, syrup, fudge mixes, icings, and other sweets.

Fats and oils includes margarine, shortening and salad dressings, nondairy cream substitutes and imitation milk, and peanut butter.

Miscellaneous foods includes frozen prepared meals and other foods, canned and packaged soups, potato chips, nuts and other snacks, condiments and seasonings, olives, pickles, relishes, sauces and gravies, baking needs and other specified condiments, other canned and packaged prepared foods, salads, desserts, and baby foods.

Nonalcoholic beverages includes diet and nondiet carbonated drinks (cola, fruit, and other carbonated drinks), coffee (roasted, instant, and freeze dried), tea (loose, instant, and ready-to-drink), and other nonalcoholic beverages, including noncarbonated fruit drinks, breakfast substitutes, chocolate flavored powders, and other specified nonalcoholic beverages.

Food away from home includes all meals (breakfast, lunch, brunch, and dinner) at restaurants, carryouts, and vending machines, including tips, plus meals as pay, special catered affairs such as weddings, bar mitzvahs, and confirmations, and meals away from home on trips.

Alcoholic beverages includes beer and ale, wine, whiskey, gin, vodka, rum, and other alcoholic beverages.

Housing

Owned dwellings includes interest on mortgages, property taxes and insurance, refinancing and prepayment charges, ground rent, expenses for property management/security, homeowners' insurance, fire insurance and extended coverage, expenses for repairs and maintenance contracted out, and expenses of materials for owner-performed repairs and maintenance for dwellings used or maintained by the consumer unit. Mortgage principal repayments are payments of loans and are shown in Other financial information.

Rented dwellings includes rent paid for dwellings, rent received as pay, parking fees, maintenance, and other expenses.
Other lodging includes all expenses for vacation homes, school, college, hotels, motels, cottages, trailer camps, and other lodging while out of town.

Utilities, fuels, and public services includes natural gas, electricity, fuel oil, wood, kerosene, coal, bottled gas, water, garbage and trash collection, sewerage maintenance, septic tank cleaning, telephone charges, and other public services.

Domestic services includes babysitters, day care tuition, care of invalids, and domestic and other duties.

Other household expenses includes housekeeping services, gardening and lawn care services, coin-operated laundry and dry-cleaning (non-clothing), termite and pest control products, moving, storage, and freight expenses, repair of household appliances and other household equipment, repair of computer systems for home use, reupholstering and furniture repair, rental and repair of lawn and gardening tools, and rental of other household equipment.

Housekeeping and garden supplies includes laundry and cleaning supplies, cleaning and toilet tissues, stationery supplies, postage, miscellaneous household products, and lawn and garden supplies.

Household textiles includes bathroom, bedroom, kitchen, dining room, and other linens, curtains and drapes, slipcovers and decorative pillows, and sewing materials.

Furniture includes living room, dining room, kitchen, bedroom, nursery, porch, lawn, and other outdoor furniture.

Floor coverings includes installation and replacement of wall-to-wall carpets, room-size rugs, and other soft floor coverings.

Major appliances includes refrigerators, freezers, dishwashers, stoves, ovens, garbage disposals, vacuum cleaners, microwaves, air-conditioners, sewing machines, washing machines and dryers, and floor cleaning equipment.

Small appliances/miscellaneous housewares includes small electrical kitchen appliances, portable heating and cooling equipment, china and other dinnerware, flatware, glassware, silver and other serving pieces, nonelectric cookware, and plastic dinnerware. Excludes personal care appliances.

Miscellaneous household equipment includes typewriters, luggage, lamps and other light fixtures, window coverings, clocks, lawn mowers and gardening equipment, other hand and power tools, telephone answering devices, telephone accessories, computers and computer hardware for home use, computer software and accessories for home use, calculators, office equipment for home use, floral arrangements and house plants, rental of furniture, closet and storage items, household decorative items, infants' equipment, outdoor equipment, smoke alarms, other household appliances, and small miscellaneous furnishings.
Apparel and services

Men's and boys' apparel includes coats, jackets, sweaters, vests, sportcoats, tailored jackets, trousers, slacks, shorts and short sets, sportswear, shirts, underwear, nightwear, hosiery, uniforms, and other accessories.

Women's and girls' apparel includes coats, jackets, furs, sportcoats, tailored jackets, sweaters, vests, blouses, shirts, dresses, dungarees, culottes, slacks, shorts, sportswear, underwear, nightwear, uniforms, hosiery, and other accessories.

Apparel for children under 2 includes coats, jackets, snowsuits, underwear, diapers, dresses, crawlers, sleeping garments, hosiery, footwear, and other accessories for children under 2.

Footwear includes articles such as shoes, slippers, boots, and other similar items. It excludes footwear for children under 2 and special footwear used for sports such as bowling or golf shoes.

Other apparel products and services includes material for making clothes, shoe repair, alterations and repairs, sewing patterns and notions, clothing rental, clothing storage, dry cleaning, sent out laundry, watches, jewelry, and repairs to watches and jewelry.

Transportation

Vehicle purchases (net outlay) includes the net outlay (purchase price minus trade-in value) on new and used domestic and imported cars and trucks; other vehicles include attachable campers, trailers, motorcycles, and private planes.

Vehicle finance charges includes the dollar amount of interest paid for a loan contracted for the purchase of vehicles described above.

Gasoline and motor oil includes gasoline, diesel fuel, and motor oil.

Maintenance and repairs includes tires, batteries, tubes, lubrication, filters, coolant, additives, brake and transmission fluids, oil change, brake adjustment and repair, front-end alignment, wheel balancing, steering repair, shock absorber replacement, clutch and transmission repair, electrical system repair, exhaust system repair, body work and painting, motor repair, repair to cooling system, drive train repair, drive shaft and rear-end repair, tire repair, other maintenance and services, and auto repair policies.

Vehicle insurance includes the premium paid for insuring cars, trucks, and other vehicles.

Public transportation includes fares for mass transit, buses, trains, airlines, taxis, private school buses, and boats.

Vehicle rent, licenses, and other charges includes leased and rented cars, trucks, motorcycles, and aircraft, inspection fees, State and local registration, drivers' license fees, parking fees, towing charges, and tolls.
Health care

Health insurance includes health maintenance plans (HMO's), Blue Cross/Blue Shield, commercial health insurance, Medicare, Medicare supplemental insurance, and other health insurance.

Medical services includes hospital room and services, physicians' services, service of a practitioner other than physician, eye and dental care, lab tests, X-rays, nursing, therapy services, care in convalescent or nursing home, and other medical care.

Drugs includes prescription and nonprescription drugs, internal and respiratory over-the-counter drugs.

Medical supplies includes topicals and dressings, antiseptics, bandages, cotton, first aid kits, contraceptives, syringes, ice bags, thermometers, sunlamps, vaporizers, heating pads, medical appliances such as braces, canes, crutches, and walkers, eyeglasses, and hearing aids, rental and repair of medical equipment.

Entertainment

Fees and admissions includes fees for participant sports; admissions to sporting events, movies, concerts, plays; health, swimming, tennis and country club memberships, and other social recreational and fraternal organizations; recreational lessons or instruction; rental of movies, and recreation expenses on trips.

Television, radio, and sound equipment includes television sets, video recorders, video cassettes, tapes, disks, disk players, video game hardware, video game cartridges, cable TV, radios, phonographs, tape recorders and players, sound components, records and tapes, and records and tapes through record clubs, musical instruments, and rental and repair of TV and sound equipment.

Pets, toys, hobbies, and playground equipment includes pet food, pet services, veterinary expenses, toys, games, hobbies, tricycles, and playground equipment.

Other entertainment equipment and services includes indoor exercise equipment, athletic shoes, bicycles, trailers, campers, camping equipment, rental of campers and trailers, hunting and fishing equipment, sports equipment, winter sports equipment, water sports equipment, boats, boat motors and boat trailers, rental of boats, landing and docking fees, rental and repair of sports equipment, photographic equipment, film and film processing, photographer fees, repair and rental of photo equipment, fireworks, pinball and electronic video games.

Other expenditures

Personal care products and services includes products for the hair, oral hygiene products, shaving needs, cosmetics and bath products, electric personal care appliances, other personal care products, personal care services for males and females.
Reading includes subscriptions for newspapers, magazines, and books through book clubs; purchase of single copy newspapers and magazines, newsletters, books, and encyclopedias and other reference books.

Education includes tuition, fees, textbooks, supplies, and equipment for public and private nursery schools, elementary and high schools, colleges and universities, and other schools.

Tobacco products and smoking supplies includes cigarettes, cigars, snuff, loose smoking tobacco, chewing tobacco, and smoking accessories such as cigarette or cigar holders, pipes, flints, lighters, pipe cleaners, and other smoking products and accessories.

Miscellaneous includes safety deposit box rental, checking account fees and other bank services, legal fees, accounting fees, funerals, cemetery lots, union dues, occupational expenses, and finance charges other than for mortgage and vehicles.

Cash contributions includes cash contributed to persons or organizations outside the consumer unit including alimony and child support payments, care of students away from home, and contributions to religious, educational, charitable, or political organizations.

Life, endowment, annuities, and other personal insurance includes premiums for whole life and term insurance; endowments; income and other life insurance; mortgage guarantee insurance; mortgage life insurance; premiums for personal liability, accident and disability, and other nonhealth insurance other than for homes and vehicles.

Retirement, pensions, and Social Security includes all Social Security contributions paid by employees; employee's contributions to railroad retirement, government retirement, and private pension programs; retirement programs for self-employed.

3. Income and personal taxes

Income is the combined income of all consumer unit members 14 years of age or over during the 12 months preceding the interview. The components of income are described below. The order of the definitions of income and personal taxes follows the order of presentation in the reference tables.

For a definition of Complete income reporters or Quintiles of income, see section 1.

Money income before taxes is the total money earnings and selected money receipts during the 12 months prior to the interview date. It includes the following components:

Wages and salaries includes total money earnings for all consumer unit members, 14 years of age and over, from all jobs, including civilian wages and salaries, Armed Forces pay and allowances, piece-rate payments, commissions, tips, National Guard or Reserve pay (received for training periods), and cash bonuses before deductions for taxes, pensions, union dues, etc.
Self-employment income includes net business and farm income, which consists of net income (gross receipts minus operating expenses) from a profession or unincorporated business or from the operation of a farm by an owner, tenant, or sharecropper. If the business or farm is a partnership, only an appropriate share of net income is recorded. Losses are also recorded.

Social Security, private and government retirement includes the following: (1) payments by the Federal Government made under retirement, survivors', and disability insurance programs to retired persons, to dependents of deceased insured workers, or to disabled workers; and (2) private pensions or retirement benefits received by retired persons or their survivors, either directly or through an insurance company.

Interest, dividends, rental income, and other property income includes interest income on savings or bonds; payments made by a corporation to its stockholders, periodic receipts from estates or trust funds; net income or loss from the rental of property, real estate, or farms, and net income or loss from roomers or boarders.

Unemployment and workers' compensation and veterans' benefits includes income from unemployment compensation and workers' compensation, and veterans' payments including educational benefits, but excluding military retirement.

Public assistance, supplemental security income, and food stamps includes public assistance or welfare, including money received from job training grants; supplemental security income paid by Federal, State, and local welfare agencies to low-income persons who are age 65 or over, blind, or disabled; and the value of food stamps obtained.

Regular contributions for support includes alimony and child support as well as any regular contributions from persons outside the consumer unit.

Other income includes money income from care of foster children, cash scholarships, fellowships, or stipends not based on working; and meals and rent as pay.

Federal income taxes includes Federal income taxes withheld in survey year to pay for income earned in survey year plus additional taxes paid in survey year to cover any underpayment or underwithholding of taxes in the year prior to the survey.

State and local income taxes includes State and local income taxes withheld in survey year to pay for income earned in survey year plus additional taxes paid in survey year to cover any underpayment or underwithholding of taxes in year prior to survey.

Other taxes includes personal property and other personal taxes paid, including Social Security taxes for the self-employed paid in the survey year to cover any underpayment or underwithholding of taxes in the year prior to the survey.

4. Other financial information

The items here are not part of expenditures or income. They are provided for additional information.
Net change in assets includes changes in savings and checking accounts; purchases of securities (stocks, bonds, or mutual funds) in the year which they were held to the end of the year, sales of securities which were purchased in a prior year; changes in the balances of money owed to the consumer unit (CU); sales and purchases, and repairs and improvements to own dwelling occupied by the CU; vacation home, recreational property, unimproved land and other property owned by the CU; changes in investments in unincorporated family businesses and farms; amounts received or reimbursements from the sale of vehicles; principal amounts of trust held on own dwelling, vacation home, and other properties owned by the CU; and surrender of insurance policies. This value has a positive or negative sign to indicate increase or decrease in assets.

Net change in liabilities includes changes in mortgage principal on own dwelling occupied by the consumer unit (CU), vacation home, recreational property, unimproved land and other property owned by the CU; payments of mortgage interest due before either survey year of the survey period; money owed on purchases of cars, trucks, and other vehicles, and money owed to other creditors such as department stores, banks, credit unions, finance companies, insurance companies, doctors, dentists, and other medical practitioners. This value has a positive or negative sign to indicate increases or decreases in liabilities.

Other money receipts includes lump-sum payment from estates, trusts, insurance, sale of house furnishings, refunds from overpayment on Social Security, refunds from insurance policies, and refunds from property taxes.

Mortgage principal paid on owned property includes the reduction of mortgage principal on a mortgage obtained prior to the interview quarter for a home or any other property. This is not included in homeowner costs, but is repayment of a loan.

Gifts of goods and services includes gift expenditures for persons outside of the consumer unit: (1) clothing for females and males over 2 years of age, and infants under 2 years of age; (2) jewelry and watches; (3) small appliances and miscellaneous housewares; (4) blankets, sheets, towels, and table linens; and (5) all other gifts. These items have already been defined. Their values are given so they can be subtracted from the expenditure totals if the value of consumption within the household is desired.