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MEMORANDUM FOR ACS Research and Evaluation Steering Committee

From: Charles Nelson */Signed/*  
Chief  
Social, Economic and Housing Statistics Division

Prepared by: Edward J. Welniak Jr., Amanda R. Noss, and Kirby G. Posey  
Income Statistics Branch  
Social, Economic, and Housing Statistics Division

Subject: 2010 ACS Content Test Evaluation Report Covering Property  
Income

Attached is the final 2010 ACS Content Test Evaluation Report Covering Property Income. This report describes the results of the 2010 Content Test with a change to the Property Income question. Final results indicate the test question wording will be implemented for 2013 ACS. If you have any questions about this report, please contact Edward Welniak at (301)763-5533, Amanda Noss at (301)763-6675, or Kirby Posey at (301)763-5548.

Attachment: (2010 ACS Content Test Evaluation Report Covering Property Income)

cc:  
ACS Research and Evaluation Steering Committee  
ACS Research and Evaluation Team  
Todd Hughes (ACSO)  
Debra Klein  
Donna Daily  
Jennifer Childs  
Jennifer Tancreto (DSSD)  
Tony Tersine  
Mary Davis  
Charles Nelson (SEHSD)

# 2010 ACS Content Test Evaluation Report Covering Property Income

FINAL REPORT

Edward J. Welniak Jr.

Amanda R. Noss

Kirby G. Posey

Social, Economic, and  
Housing Statistics Division

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## EXECUTIVE SUMMARY

### Test Objective

In late August through mid-December 2010, the Census Bureau conducted a field test of new and revised content in the 2010 American Community Survey (ACS) Content Test. The results of that testing will help determine the content to be incorporated into production ACS in 2013.

Research shows that respondents have difficulties remembering all the information read to them in a single, verbose question (Webster, 2006). If a question contains a long list of components or concepts for respondents to consider, respondents tend to focus on the last items in the list and forget the others when the list is presented orally. In the case of the ACS CATI (Computer Assisted Telephone Interview) /CAPI (Computer Assisted Personal Interview) Property Income question, respondents are asked if they received “interest, dividends, net rental income, royalty income, or income from estates and trusts.” We believe respondents are focusing on reporting whether they received income from estates and trusts, royalty income, or net rental income and missing the reporting of interest and dividend income. We have anecdotal evidence to support this belief. A similar situation occurs with another income question. For example, while observing ACS interviews, we noted that respondents report having a wage/salary job but report having no “wages, salary commissions, bonuses or tips” from that job. Because this “end of the list” effect only seems to occur in telephone or personal interviews – not in mail mode responses – changes are being made to the CATI/CAPI questions only for this test. However, the analysis will study the impact on responses to the Property Income question across all modes, since we do not publish ACS data by mode. An investigation of the impact of the change will be done by mode for informational purposes only.

### Methodology

The Content Test compared two versions of Property Income questions. The control version replicated the wording and response categories used in the current production ACS question:

“Did you receive Interest, Dividends, Net Rental Income, Royalty Income, or income from estates and trusts? Report even small amounts credited to an account.”

<1> Yes

<2> No

The test version asked three separate questions while still keeping all components...

“The next few questions are about income DURING THE PAST 12 MONTHS, that is from <DATE> to <DATE>...”

“DURING THE PAST 12 MONTHS, did you receive any interest or dividends?  
Report even small amounts credited to an account.”

- <1> Yes
- <2> No

[if yes] “What was the amount? “

“Did you receive any rental income?”

- <1> Yes
- <2> No

[if yes] “What was the net amount—that is, the total amount after expenses for the  
PAST 12 MONTHS?”

“Did you receive any royalty income or income from estates and trusts?”

- <1> Yes
- <2> No

[if yes] “What was the amount for the PAST 12 MONTHS?”

## **Research Questions and Results**

### **Is the response distribution of Property Income comparable to the Current Population Survey’s Annual Social and Economic Supplement (ASEC) distribution of Property Income?**

Yes. The overall distribution of Property Income for the test version is comparable to that of the CPS ASEC. However, formal comparisons were not made since the Content Test data were not edited or imputed, adjusted for nonresponse, nor raked to known population totals.

### **Do the changes to the Property Income question raise the number of persons receiving Property Income (i.e., Property Income reciprocity)?**

Yes, changes to the Property Income questions significantly raise the estimate of persons receiving Property Income.

### **Do the changes to the Property Income question raise the estimate of Property Income amount?**



No, the changes to the Property Income question do not raise the estimated mean or median of Property Income.

**Do the changes to the Property Income question affect the response distribution, shifting respondents from lower Property Income categories to higher categories?**

No, the changes to the Property Income question do not significantly affect the response distribution.

**Do the changes to the Property Income question result in the same or lower item missing data rates?**

No, the changes to the Property Income question do not significantly affect the item missing data rate for reciprocity; however, the item missing data rate for amount is significantly higher in the test version. This may be due to having three questions versus one question. The second and third questions are getting “don’t know” responses.

**Do the changes to the Property Income question lower item response error (i.e., bias) in the estimate of Property Income reciprocity and amount?**

Yes, the changes to the Property Income question significantly lower the NDR (net difference rate) for reciprocity compared with the control. However, the test version NDRs for amount are not significantly lower than the control version values.

**Do the changes to the Property Income question (together with changes in the Wages and Cash Public Assistance questions) lower the estimate of poverty rate?**

No, changes to the Property Income question (together with changes in the Wages and Cash Public Assistance questions) do not lower the estimate of the poverty rate.

**For each mode of data collection, do the changes to the Property Income question affect the item missing data rates, the estimates of Property Income reciprocity and amount, or response error (i.e., bias) for these two estimates?**

There are significant results in all modes: Test version estimates of reciprocity are significantly higher in all modes except mail. Also, test version reciprocity NDRs are significantly lower than control in all modes except mail.

In CATI/CAPI, the estimated proportion of total Property Income in the \$500+ category is significantly lower for the test version; and in CAPI the estimated proportion in the \$0 or Loss category is significantly higher for the test version.

Item missing data rates for reciprocity are significantly higher for the test version for CATI/CAPI combined and CATI.

**For each mail response stratum, do the changes to the Property Income question affect the item missing data rates, the estimates of Property Income reciprocity and amount, or response error (i.e., bias) for these two estimates?**

Reciprocity for the test version is significantly higher than control for both the high and low response strata. The test version reciprocity NDR is significantly lower for both the high and low response strata. For the low response stratum, the test version amount NDR is significantly lower than the control value for the DK/REF (don't know/ refusals) category; while the test version item missing data rate for amount is significantly higher than the control version rate.

**Does either question version elicit respondent or interviewer behaviors that may contribute to interviewer or respondent error?**

Results indicate that for the series as a whole the test version performs better on interviewer behavior. For respondent behavior, the test series did not perform as well as the control.

## **1. BACKGROUND**

### **1.1 Motivation for the 2010 ACS Content Test**

To evaluate proposed changes to the content of the American Community Survey (ACS), the Census Bureau conducted the 2010 ACS Content Test. The objective of the ACS Content Test, for both new and existing questions, was to determine the impact of changing question wording, response categories, and redefinition of underlying constructs on the quality of data collected.

Through the Office of Management and Budget (OMB) Interagency Committee on the ACS, subject matter experts from the Census Bureau and key data users from other federal agencies collaborated in identifying revised and new questions for inclusion in the Content Test. The suggested new and revised questions affected both the housing and detailed person sections of the ACS questionnaire.

In the housing section, the food stamps question was altered to reflect a name change for the food stamps program. In addition, a series of new questions were added related to household computer ownership and Internet subscription.

Several changes were made in the detailed person section. First, a change in data needs for the veteran series led to a revised set of response categories for the veteran's status and period of military service questions. Second, the question wording of the cash public assistance income question was modified to address under-reporting of assistance on behalf of children and single payment recipients. Third, to simplify the income questions related to wages (wages, salary, commissions, bonuses, or tips) and Property Income (interest, dividends, rental income, royalty income or income from estates and trust), these questions were broken up into smaller questions for the Computer-Assisted Telephone Interviewing (CATI) and Computer-Assisted Personal Interviewing (CAPI) instruments only. Fourth, a set of new questions on parental place of birth were added to

to allow data users to divide the population into “first generation” (the foreign born), “second generation” (the children of immigrants), and “third or higher generation” (native born with no foreign-born parents).

To meet the test objective of the 2010 ACS Content Test, analysts evaluated changes to question wording, response categories, instructions, and examples relative to a control version of the question or another version for new questions. Specifically, this report discusses Property Income.

## **1.2 Previous Testing or Analysis**

In the case of the ACS CATI/CAPI Property Income question, respondents are asked if they received "Interest, Dividends, Net Rental Income, Royalty Income, or Income from Estates and Trusts". We believe respondents are focusing on reporting whether they received income from estates and trusts or net rental income and missing the reporting of interest and dividend income. While observing ACS interviews we noted that respondents report having a wage/salary job but report having no “wages, salary, tips, bonuses, or commissions from that job. The same was believed to be happening to the Property Income question as well. When given a long list of items respondents tend to focus on a few items and disregard the rest. (Webster, 2006)

### 1.3 Recommendations from Cognitive Testing

Prior to conducting the Content Test, the Research Triangle Institute (RTI), Westat, and Research Support Services (RSS) conducted cognitive interviewing, under contract, to assist in identifying a final set of questions for the field test. Multiple versions of each question topic were tested with the goal of choosing the best one for the revised questions and the best two for the new questions. The questions were pretested in the three modes used in the ACS data collection (paper, telephone interview, and personal interview) in English and Spanish. Cognitive interviews consisted of one-on-one interviews using the proposed questions in the context of the ACS survey. Survey methodologists also conducted respondent debriefings.

Most respondents had no difficulty articulating the types of income that would be included in these questions. Among those respondents who reported having received rent, royalties, estate income, or trusts, their comments were directed more to their own personal situations, with a focus on the type of income they receive. Other respondents who did not report receiving income of these types provided adequate explanations of the intent of the question with only a few exceptions.

RTI International tested two versions of proposed new ACS questions about Property Income (interested and dividends) as a source of income. The text in both versions was very similar, but Version 2 had an additional point of clarification added. The Version 1 text read, "Report even small amounts credited to an account." The Version 2 text read, "Report even small amounts credited to a checking or savings account." Many respondents were confused about the mentioning of accounts. It was recommended for CATI and CAPI version to emphasize "amounts credited to an account" meaning, money that the individual did not actually deposit on their own. During the reporting of rental income, royalties, and income from estates and trusts, respondents showed no difficulty responding.

The main recommendation was to include the emphasis on income sources "during the past 12 months" for all three questions. It was also suggested to fill in the months whenever the phrase "the past 12 months" is used. For example: "The next few questions are about income DURING THE PAST 12 MONTHS, which is from <DATE> to <DATE>."

For more information see (RTI International, "Cognitive Testing of the American Community Survey Content Test Items.")

## **1.4 Recommendations from the Expert Review Panel**

Following the cognitive testing, an expert review panel, composed of government survey methodology experts, reviewed and added changes to the final question versions proposed to move forward from the cognitive testing into the field test. The proposed changes for each question topic were approved by the corresponding OMB interagency subcommittee responsible for initiating the research. The OMB provided final approval of the proposed changes.

The expert panel's recommendation was to change the cognitive test question wording slightly by making "during the past 12 months" present for all three questions. It was also recommended to remove "net" from "net rental income". See appendix B for question wording tested.

## **2. SELECTION CRITERIA**

The research questions in sections 5.2 through 5.10 appear in order of importance for the decision of whether the test version of the question is better than the control question. The selection criteria below are also shown in order of importance to the decision.

The overall distribution of Property Income for the test version should have been comparable to that of the CPS ASEC. An increase in Property Income receipt and the amount of Property Income received in the test version implied a positive change since this item is presumed to be underestimated. Also, the lower part of the distribution should shift higher. The item missing data rates and response error (i.e., bias) were considered together when determining whether the test version performs better.

Since changes to the Property Income question appear only in the CATI/CAPI instrument (and not in the mail questionnaire) the following items were evaluated together by response mode: item missing data rates; the estimates of property reciprocity, wages income amount means and medians; distribution of Property Income among five categories; and response error, as measured by net difference rates.

## **3. METHODOLOGY**

### **3.1 Data Collection Methods**

The initial stages of the Content Test consisted of content determination, cognitive laboratory pretesting, and expert reviews for the purpose of developing alternate versions of question content. The field test portion of the ACS Content Test used the data collection methodology currently used in the production ACS (i.e., mail questionnaire, follow-up CATI, and follow-up CAPI) with an added reinterview conducted via a CATI instrument known as the Content Follow-Up (CFU). Additional data were collected on respondent and interviewer behavior during the field test via Computer Audio Recorded Interviewing (CARI) technologies for a subset of respondents during the CATI and CAPI follow-up modes of data collection.

The Content Test followed the same schedule and procedures for the mail, CATI, and CAPI operations as the September 2010 ACS production panel. Questionnaires were mailed to sampled households at the end of August 2010. The Content Test used an English-only mail form but the automated instruments (CATI, CAPI, and CFU) included both English and Spanish versions. Households not responding by mail and for which we had a phone number were contacted for a CATI interview during the month of October 2010. In November 2010, Census Bureau field representatives visited a sample of households that did not respond by mail or CATI to attempt a CAPI interview. The CAPI operations ended December 2, 2010.

The field test included a CATI CFU reinterview to collect additional measures for the study of response error. This operation started approximately two weeks after the initial mail out of questionnaires and ended two weeks after the end of the CAPI follow-up data collection operation. The CFU included all occupied households for which we received a response in the original interview and had a telephone number. A response was defined as a case where the household provided data through at least the first person's place of birth question for mail cases or at least a sufficient partial interview for CATI/CAPI interviews. The reinterview was conducted about 2 to 4 weeks after the original interview and with the original respondent when possible. Note that the CFU CATI interview was an abbreviated version of the original Content Test interview. The CFU instrument included the basic demographic section and only those questions preceding the questions being tested in the housing and the detailed person sections to provide context (see Appendix F for the flow of the CFU instrument).

The ACS Content Test did not include all of the production data collection operations and processes. First, while the Telephone Questionnaire Assistance program's toll-free number was available to Content Test respondents for assistance, the CATI instrument did not include content changes from the Content Test. Therefore data collected from Content Test respondents via TQA CATI interview were not included in our analysis. Second, since our objective was to study response error using unedited data, the Content Test excluded the Failed Edit Follow-up (FEFU) CATI operation and the edit and imputation data processes.

### **3.2 Sample Design**

The 2010 Content Test consisted of a national sample of 70,000 residential addresses in the contiguous United States (the sample universe did not include Puerto Rico, Alaska, and Hawaii). The sample design for the Content Test was largely based on the ACS production sample design with some modifications to meet the test objectives. The modifications included adding an additional level of stratification by stratifying addresses into high and low mail response areas, over-sampling addresses from the low mail response areas to ensure equal response from both strata, and sampling units as pairs. The high and low mail response strata were defined based on ACS mail response rates at the tract-level. The paired sample selection formed pairs by first systematically sampling an address within the defined sampling strata and then pairing that address with the

address listed next in the geographically sorted list. However, the pair was not likely comprised of neighboring addresses. One member of the pair was randomly assigned to the control group and the other member was assigned to the test group. Those addresses assigned to the test group received the revised ACS questions and the questions new to the ACS. The control group received the current questions on the production ACS as well as different versions of the new questions.

Another modification to the production ACS sample design included adding a third sampling stage. At the first stage, the production 2010 ACS first stage sample was used as the Content Test first stage sample. At the second stage, all housing units in the ACS first stage sample not selected in the production 2010 ACS second-stage sample were selected as the Content Test second-stage sample. In addition, any units that were selected to be in other operations (e.g., training, other tests, etc.) were not selected in the Content Test second stage sample. At the third stage, addresses were selected using a sampling method similar to the production ACS second stage sample design with the exception of adding the high and low mail response stratification.

### **3.3 Methodology Specific to the Property Income**

Only persons 15 or older were considered in the universe for the analysis, since all income questions are only asked of this universe. On the mail questionnaire, public assistance reciprocity was determined if there was a “Yes” response in the reciprocity field or if a dollar amount greater than zero was in the Property income amount field.

Using data from the Content Test and CFU, net difference rates were compared between the control and test versions. Instead of reasking the same questions in the CFU, ASEC questions were instead used as a “truth measure”. See appendix E for the CFU question wording. Finally, an estimate of the poverty rate, based on unedited data, between the control and test versions was compared.

## **4. LIMITATIONS**

Control and test CATI-CAPI workload assignments were not assigned using an interpenetrated experimental design. That is, interviewers were allowed to administer interviews for both control and test cases, in addition to production ACS cases. The potential risk of this approach is the introduction of a cross-contamination or carry-over effect due to the interviewer administering multiple versions of the same question item. Interviewers are trained to read the questions verbatim to minimize this risk, but there still exists the possibility that an interviewer may deviate from the scripted wording of one question version to another. This could potentially mask a treatment effect from the data collected.

The CFU reinterview was not conducted in the same mode of data collection for households that responded by mail or CAPI in the original interview since CFU interviews were only administered using a CATI mode of data collection. As a result, the

data quality measures derived from the reinterview may include some bias due to the differences in mode of data collection.

Respondents needed to provide a telephone number in the original Content Test interview in order for the Census Bureau to contact them for a CFU interview. As a result, 18.4 percent of the respondents from the original interview were not eligible for the CFU reinterview.

We did not have the same respondent in the CFU that we had in the original interview for about 9.1 percent of the CFU cases. This means that differences between the original interview and the CFU for these cases could be due in part to having different people answering the questions.

The Content Test does not include the production weighting adjustments for seasonal variations in ACS response patterns, nonresponse bias, and under-coverage bias. The CFU portion of the Content Test did include a unit nonresponse adjustment for those Content Test cases that responded to the Content Test, but failed to respond to the CFU. As a result, the statistics derived from the Content Test data do not provide the same level of inference as the production ACS to the entire population of housing units and persons in the contiguous United States.

## **5. RESEARCH QUESTIONS AND RESULTS**

### **5.1 Response to the Content Test and Content Follow-Up**

Table 1 shows the unit response rates for each of the modes of data collection and all modes combined (excluding CFU) by the control and test groups. The comparison between control and test show that respondent participation was similar for both control and test for each of the modes of data collection and all modes combined, with the exception of the CATI mode. The test treatment produces a CATI rate of response that is 3 percentage points higher compared to that of the control. We can not explain the decrease in response due to the test treatment for the CATI mode of data collection other than by random occurrence given that the conditions affecting unit response were equivalent between the test and control groups.



Table 1. Content Test Response Rate Comparisons Between the Control and Test Treatments

Mode	Test (%)	Standard Error (%)	Control (%)	Standard Error (%)	Test - Control (%)	Standard Error (%)	Significant
All Modes (CFU excluded)	95.4	0.2	95.7	0.2	-0.3	0.3	No
Mail	58.1	0.5	57.7	0.5	0.5	0.7	No
CATI	52.6	1.2	49.6	1.0	3.0	1.5	Yes
CAPI	90.4	0.5	91.5	0.5	-1.1	0.7	No
CFU	54.3	0.5	53.5	0.6	0.8	0.7	No

Source: U.S. Census Bureau, 2010 American Community Survey Content Test

### 5.2 Is the response distribution of Property Income comparable to the 2010 Current Population Survey’s Annual Social and Economic Supplement (ASEC) distribution of Property Income?

Table 2 shows the response distributions of the test and control versions compared to the 2010 CPS ASEC. We cannot make formal statistical comparisons since we did not edit or impute the content test data, nor adjust for non-response or rake to known population totals. In the mail mode, there was no interaction with a trained interviewer. Without a trained interviewer administering the survey, the higher incidents of high income values in ACS control and test versions may be mail respondents reporting asset values and not income generated from the asset. The differences between the ACS Content Test estimates and the CPS ASEC estimates in the \$3-\$199 category and in the combined categories of \$5,000 and above are partially due to mail responses. Similar differences are found between ACS production estimates and CPS ASEC.

Category	ASEC Estimate (%)	Standard Error (%)	Test Estimate (%) (n=4,217)	Standard Error (%)	Control Estimate (%) (n=3,865)	Standard Error (%)
\$1 or \$2	6.9	NA	2.3	0.4	1.3	0.3
\$3 - \$199	42.2	NA	24.7	1.1	23.4	1.0
\$200- \$499	12.1	NA	9.8	0.6	9.5	0.5
\$500 - \$999	7.6	NA	8.0	0.4	7.5	0.5
\$1,000 - \$4,999	17.5	NA	22.8	0.9	25.0	1.1
\$5,000 - \$9,999	5.8	NA	10.5	0.6	11.1	0.7
\$10,000 - \$24,999	5.0	NA	12.8	0.6	13.1	0.7
\$25,000 or more	3.0	NA	9.2	0.6	9.0	0.6
Total:	100.0		100.0		100.0	

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

### 5.3 Do the changes to the Property Income question raise the number of persons receiving Property Income (i.e., Property Income reciprocity)?

The proportion of people receiving Property Income was computed for both test and control. The difference in the reciprocity proportions was then computed using a one-sided test to determine whether there is a statistically significant positive difference

between the test and control reciprocity proportions, using a significance level of  $\alpha = 0.10$ .

Table 3 shows reciprocity rates of persons receiving Property Income for the control and test groups and the difference between the test and control groups. The changes to Property Income questions significantly raise the estimate of persons receiving Property Income.

Table 3. Reciprocity Rate							
	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test – Control (%)	Standard Error (%)	Significance
Reciprocity Rate:	15.5	0.3	13.6	0.3	1.9	0.4	YES

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

#### 5.4 Do the changes to the Property Income question raise the estimate of Property Income?

The mean and median estimates of Property Income were computed for the control and test versions for each panel. Values of 0 were used in the calculations, but missing values were excluded. The test statistic is the difference between the two estimates divided by the estimated standard error of that difference.

Table 4 shows median and mean estimates of Property Income for the test and control groups and the difference between the test and control groups. A one-sided test was used to determine if the test group had a statistically significant larger median and mean using an  $\alpha = 0.10$ . The results showed that the mean and median estimates of Property Income are not significantly higher in the test version of the question.

Table 4. Mean and Median Estimates of Property Income							
Measure	Test Estimate	Standard Error	Control Estimate	Standard Error	Test - Control	Standard Error	Significance
Mean	\$8,689	\$574	\$10,080	\$868	-\$1,390	\$938	NO
Median	\$1,944	\$29	\$1,997	\$35	-\$53	\$48	NO

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

#### 5.5 Do the changes to the Property Income question affect the response distribution, shifting the lower Property Income categories of the distribution higher?

Table 5 below shows detailed results of the response distribution. The goal was to determine if there were fewer \$0 amounts, \$1 or \$2 amounts, and the 3 categories ranging from \$3 to \$2500 in the control panel and more amounts greater than \$2500 in the test panel. There is no expected Property Income category that should increase due to the movement out of the lower Property Income ranges. To test whether an overall categorical response distribution is dependent on the question version (control or test); the Pearson's chi square statistic ( $\chi^2$ ) was calculated and adjusted for the complex sample design.

For this family of two-sided hypothesis tests, the family wise error rate has been controlled using the Bonferroni-Holm multiple comparison method at the  $\alpha = 0.10$  level. Changes to the Property Income question do not significantly affect the distribution for any of the categories.

Category	Test Estimate (%) (n=4,809)	Standard Error (%)	Control Estimate (%) (n=4,483)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significant
\$0 or Loss	9.9	0.5	11.1	0.6	-1.2	0.9	NO
\$1 or \$2	2.0	0.4	1.2	0.3	0.9	0.4	NO
\$3 - \$199	22.2	1.0	20.8	0.9	1.4	1.3	NO
\$200 - \$499	8.8	0.5	8.5	0.5	0.4	0.8	NO
\$500 or more	56.9	1.1	58.4	1.2	-1.5	1.7	NO
Total:	100		100				

$\chi^2 = 7.9$  with 4 degrees of freedom, significant at the 10 percent level.

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

### 5.6 Do the changes to the Property Income question result in the same or lower item missing data rates?

Table 6 shows item missing data rates for the test and control versions. The item missing data rates were compared between the control and the test versions for reciprocity and amount to see whether the control version rates are significantly higher. First, each item missing data rate was computed. Then the difference was calculated. A one-sided test was used to determine whether there is a statistically significant negative difference between the test and control reciprocity item data missing rates, using a significance level of  $\alpha = 0.10$ .

The test version was not significantly less than the control version; in fact, the item missing data rate for amount is significantly higher in the test version.

	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test – Control (%)	Standard Error (%)	Test signif. less than control?
Reciprocity:	16.9 (n=38,876)	0.4	16.8 (n=38,896)	0.4	0.1	0.6	NO
Amount:	13.6 (n=5,434)	0.8	11.8 (n=4,985)	0.8	1.8	1.1	NO <sup>1</sup>

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

<sup>1</sup>Test is significantly greater than control at the  $\alpha = 0.10$  significance level using a one-sided test.

### 5.7 Do the changes to the Property Income question lower item response error (i.e., bias) in the estimate of Property Income reciprocity and amount?

The net difference rates were both calculated for reciprocity control and reciprocity test. The difference between the absolute values of the net difference rates was then computed, as well as the standard error of the difference. A one-sided test was used to determine if the Test group had a statistically significant lower absolute net difference rate than the Control group using an  $\alpha = 0.10$ .

Net difference rates were also calculated for each income range shown in the table below. The difference in the absolute value of the net difference rates and the standard error on the difference was calculated. For this family of one-sided hypothesis tests, the familywise error rate has been controlled using the Bonferroni-Holm multiple comparison method at the  $\alpha = 0.10$  level.

Table 7 shows that changes to the Property Income question significantly lower the NDR for reciprocity compared to the control version. The test version the NDRs for amount are not significantly lower than the control version values.

Table 7. Net Difference Rates for Reciprocity and Amount							
Category	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Test signif. less than control?
<i>Reciprocity:</i>		(n=18,738)	(n=18,592)				
NDR	-28.9	0.6	-30.6	0.5	-1.7	0.8	YES
<i>Amount:</i>		(n=4,809)	(n=4,483)				
DK/Ref	-38.9	1.3	-40.9	1.6	-2.0	2.2	NO
\$0 or Loss	-7.9	0.9	-7.4	1.2	0.5	1.7	NO
\$1 or \$2	0.7	0.4	0.5	0.4	0.2	0.5	NO
\$3 - \$199	10.7	1.1	10.7	1.0	-0.1	1.5	NO
\$200 - \$499	3.8	0.6	3.6	0.7	0.2	1.0	NO
\$500 or more	31.6	1.3	33.5	1.5	-1.9	2.0	NO

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

### 5.8 Do the changes to the Property Income question (together with changes in the Wages and Cash Public Assistance questions) lower the estimate of poverty rate?

The crude estimate of the poverty rate was calculated for Property Income questions and the Wages and Public Assistance changes and compared for the test and control versions. These changes to the Property Income question (together with changes in the Wages and Cash Public Assistance questions) did not lower the estimate of the poverty rate.

Table 8. Poverty Rate							
	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test – Control (%)	Standard Error (%)	Test signif. less than control?
Poverty	32.4	0.4	31.5	0.5	0.8	0.6	NO

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

**5.9 For each mode of data collection, do changes to the Property Income question affect the estimates of reciprocity and Property Income, the distribution of Property Income, the item missing data rates, or response error?**

For each mail response stratum, the item missing data rates, differences in distributions among five income categories, estimates of reciprocity and Property Income and net difference rates were calculated. Statistical significance of differences was determined at the  $\alpha = 0.10$  significance level using a one-sided test.

There are significant results in all modes. Test version estimates of reciprocity are significantly higher in all modes except mail (see table 9a). Also, test version absolute values of reciprocity NDRs are significantly lower than control in all modes except mail (see table 9b). In CATI/CAPI combined, the estimated proportion of total Property Income in the \$500+ category is significantly lower for the test version (see table 9c); and in CAPI the estimated proportion in the \$0 or Loss category is significantly higher for the test version (see table 9d). Item missing data rates for reciprocity are significantly higher for the test version for CATI/CAPI combined and CATI. This may be due to multiple versions for the test version versus one question for the control version (see table 9e).

Mode	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significance
Mail	19.2	0.4	18.7	0.4	0.5	0.5	NO
CATI/CAPI	10.8	0.4	7.2	0.4	3.6	0.6	YES
CATI	18.2	0.8	13.1	0.8	5.1	1.1	YES
CAPI	8.9	0.5	5.8	0.5	3.1	0.7	YES

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

Reciprocity:	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control  (%)	Standard Error (%)	Test signif. less than control?
Mail	-36.6 (n=12,811)	0.7	-36.6 (n=12,710)	0.6	0.0	0.9	NO
CATI/CAPI	-19.3 (n=5,927)	1.1	-23.3 (n=5,882)	0.9	-3.9	1.4	YES
CATI	-22.8 (n=2,344)	1.5	-31.1 (n=2,391)	1.5	-8.3	2.1	YES
CAPI	-18.4 (n=3,583)	1.3	-21.4 (n=3,491)	1.2	-3.0	1.7	YES

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement

Category	Test Estimate (%) (n=894)	Standard Error (%)	Control Estimate (%) (n=610)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significant
\$0 or Loss	2.9	1.0	0.7	0.3	2.2	1.1	NO
\$1 or \$2	6.9	1.4	4.0	1.0	2.9	1.7	NO
\$3 - \$199	33.7	3.0	29.2	3.2	4.5	4.2	NO
\$200 - \$499	9.3	1.5	8.7	1.6	0.6	2.2	NO
\$500 or more	47.1	2.7	57.4	3.3	-10.2	4.1	YES
Total	100		100				

\*\* $\chi^2 = 11.8$  with 4 degrees of freedom, significant at the 10 percent level.

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

Category	Test Estimate (%) (n=412)	Standard Error (%)	Control Estimate (%) (n=262)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significant
\$0 or Loss	3.8	1.4	0.4	0.3	3.3	1.4	YES
\$1 or \$2	7.8	2.1	3.9	1.6	3.9	2.6	NO
\$3 - \$199	34.4	4.0	30.9	4.3	3.5	5.9	NO
\$200 - \$499	9.5	2.2	7.9	2.3	1.6	3.0	NO
\$500 or more	44.5	3.6	56.9	4.5	-12.4	5.9	NO
Total	100		100				

\*\* $\chi^2 = 10.4$  with 4 degrees of freedom, significant at the 10 percent level.

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

Mode	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Test signif. less than control?
Mail	23.2 (n=24,792)	0.4	23.9 (n=24,853)	0.4	-0.7	0.6	NO
CATI/CAPI	9.1 (n=14,084)	0.5	7.9 (n=14,043)	0.5	1.2	0.8	NO <sup>1</sup>
CATI	8.2 (n=5,023)	0.7	5.7 (n=4,941)	0.5	2.5	0.8	NO <sup>1</sup>
CAPI	9.4 (n=9,061)	0.6	8.5 (n=9,102)	0.6	0.9	0.9	NO

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

<sup>1</sup> Test is significantly greater than control at the  $\alpha = 0.10$  significance level using a one-sided test.

**5.10 For each mail response stratum, do the changes to the Property Income question affect the item missing data rates, the estimates of Property Income recipiency and amount, or response error (i.e., bias) for these two estimates?**

For each mail response stratum the item missing data rates, estimates of recipiency and Property Income and net difference rates were calculated.

Recipiency for the test version is significantly higher than control for both High and Low Response Stratum. See table 10a. This is a positive result that was expected for the test version. For the low response stratum, the test version absolute value of the amount NDR is significantly lower than the control value for the DK/REF category; while the test version net difference rate for recipiency is significantly lower than the control version rate. See table 10 b.

See tables A-1 to A-3 in Appendix A for additional testing.

Mode	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significance
High	17.7	0.4	15.6	0.4	2.1	0.5	YES
Low	8.5	0.2	7.1	0.2	1.3	0.3	YES

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

Category	Test Estimate	Standard Error	Control Estimate	Standard Error	Test-Control	Standard Error	Significant
Recipiency:	15.8	0.4	18.6	0.6	-2.8	0.7	YES
Amount:							
DK/REFUSED	25.0	2.3	32.6	1.8	-7.6	2.9	YES
\$0 or Loss	14.2	1.6	9.2	1.6	5.0	2.2	NO
\$1 or \$2	0.5	0.5	0.3	0.5	0.2	0.6	NO
\$3 - \$199	10.6	1.3	10.9	1.6	-0.4	2.0	NO
\$200 - \$499	3.3	0.9	2.9	1.0	0.4	1.4	NO
\$500 or more	24.8	1.6	28.3	2.1	-3.4	2.7	NO

\*\* $\chi^2 = 11.8$  with 4 degrees of freedom, significant at the 10 percent level.

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

**5.11 Does either question elicit respondent or interviewer behaviors that may contribute to interviewer or respondent error?**

Results indicate that for the series as a whole the test performs better on interviewer behavior. For respondent behavior, the test series did not perform as well as the control. Overall, the levels of respondent standard behavior were high. Interviewer behavior was however low for both test and control.

See the ACS 2010 Content Test Behavior Coding Report for more details.

## **6. SUMMARY**

There were unfavorable results for the Property Income test question on the item missing data rates. Item missing data rates for amount were significantly higher for the test version than the control. There were more questions in the test version. Much of this difference in item missing data rates for the test version can be explained by more “don’t know” responses to the net rental income and royalty income questions. No significant findings were found with item missing data rates by mode for amount. By mode, item missing data rates for reciprocity were higher in CATI/CAPI combined and for CATI individually for the test version.

There were several positive results that ultimately gave reasoning to go forward with the recommendation for implementing the question change. The test version raised the estimate of the number of people receiving Property Income. Specifically by mode, reciprocity estimates increased for CATI and CAPI individually and combined. The net difference rates for reciprocity overall were also lowered.

Based on the test results, it was evident that there were several advantages to changing the Property Income question. It is recommended that the Property Income question be changed to that of the test version for CATI and CAPI.

### **Acknowledgements**

The authors would like to acknowledge Mary C. Davis and Padraic Murphy for their contributions to the statistical analysis of this report.

### **References**

RTI International (August 12, 2009). “Cognitive Testing of the American Community Survey Content Test Items,” Research Triangle Park, NC).

Webster, 2006. “Comparison of Income from the CPS and ACS,” U.S. Census Bureau.



## Appendix A: Tables

Table A-1. Item Missing Data Rates-High Response Stratum							
Mode	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significance
Reciprocity	17.9	0.5	17.9	0.5	-0.1	0.7	NO
Amount	3.2	0.3	1.6	0.1	1.6	0.3	NO

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.  
 Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

Table A-2. Item Missing Data Rates-Low Response Stratum							
Mode	Test Estimate (%)	Standard Error (%)	Control Estimate (%)	Standard Error (%)	Test-Control (%)	Standard Error (%)	Significance
Reciprocity	15.6	0.3	15.1	0.3	0.4	0.4	NO
Amount	4.2	0.3	0.9	0.7	3.3	0.3	NO

Source: U.S. Census Bureau, 2010 Current Population Survey, Annual Social and Economic Supplement.

Table A-3. Net Difference Rates - High Response Stratum							
Category	Test Estimate	Standard Error	Control Estimate	Standard Error	Test-Control	Standard Error	Significant
Reciprocity:	27.0	0.7	28.4	0.7	-1.4	1.0	NO
Amount:							
DK/REFUSED	41.5	1.6	42.3	1.7	-0.8	2.5	NO
\$0 or Loss	6.7	1.1	7.1	1.3	-0.4	1.9	NO
\$1 or \$2	0.7	0.4	0.6	0.5	0.1	0.6	NO
\$3 - \$199	10.7	1.3	10.7	1.1	0.0	1.7	NO
\$200 - \$499	3.9	0.7	3.7	0.8	0.2	1.1	NO
\$500 or more	32.8	1.4	34.4	1.7	-1.5	2.2	NO

\*\* $\chi^2 = 11.8$  with 4 degrees of freedom, significant at the 10 percent level.

## Appendix B: CATI and CAPI Versions of the Control and Test Questions

### CONTROL

“Did [FILL1: <Name>/you] receive Interest, Dividends, Net Rental Income, Royalty Income, or income from estates and trusts? Report even small amounts credited to an account.”

<1> Yes

<2> No

[if yes] "What was the amount?"

### TEST

“ The next few questions are about income DURING THE PAST 12 MONTHS, that is from <DATE> to <DATE>. . .”

“DURING THE PAST 12 MONTHS, did [<Name/you>] receive any interest or dividends? Report even small amounts credited to an account.”

<1> Yes

<2> No

[if yes] What was the amount?

“Did [<Name/you>] receive any rental income?”

<1> Yes

<2> No

[if yes] “What was the net amount—that is, the total amount after expenses for the PAST 12 MONTHS? “

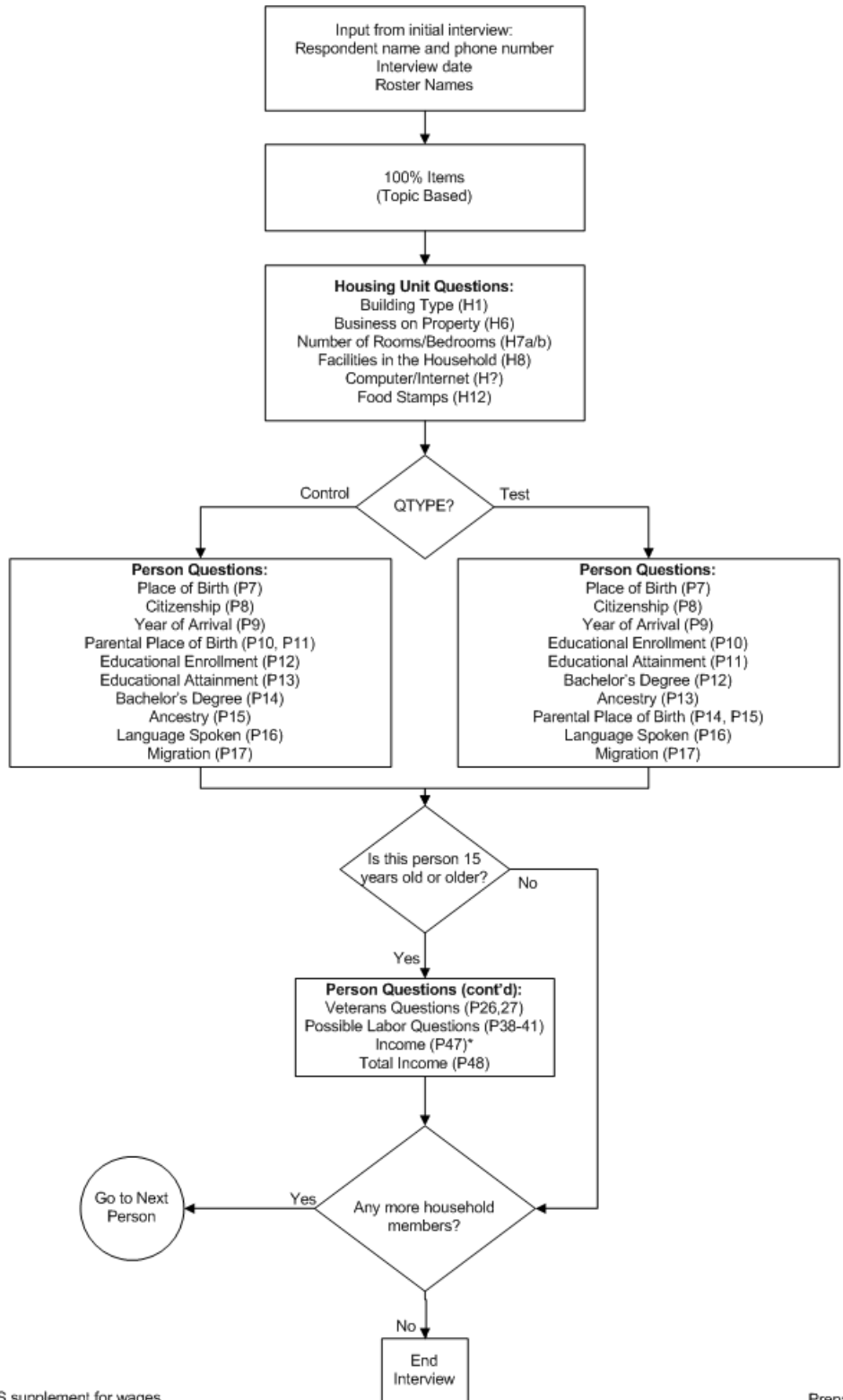
“Did [<Name/you>] receive any royalty income or income from estates and trusts?”

<1> Yes

<2> No

[if yes] What was the amount for the PAST 12 MONTHS?

## Appendix C: Flow of the Content Follow-Up



\* using CPS supplement for wages,  
property income & cash public  
assistance

## Appendix D: Information Page

### Test Design

<b>Treatments</b>	Two question versions with different wording for CATI/CAPI only (see page 4).
<b>Sample Size</b>	35,000 households per treatment (70,000 total)
<b>Sample Design</b>	Similar to production ACS with an additional level of stratification into high and low mail response areas.
<b>Modes</b>	Mail, CATI, and CAPI, with a CATI content follow-up (CFU) of all households. The change to this question will only occur in the CATI and CAPI instruments, however all modes will be considered in the analysis. <i>CATI and CAPI interviews will be recorded using Computer-Assisted Recorded Interviewing (CARI) technology.</i>
<b>Time Frame</b>	Same schedule as the production September panel: mailout in late August, CATI in October, CAPI in November. CFU goes from mid-September to mid-December.

### Research Questions & Evaluation Measures

No.	Research Questions	Evaluation Measures
1	Is the response distribution of property income comparable to the Current Population Survey's Annual Social and Economic Supplement (CPS ASEC) distribution of property income?	Compare the response distribution of property income between the test version and the CPS ASEC.  <i>We cannot make formal statistical comparisons since the Content Test data will not have been edited or imputed, adjusted for nonresponse, nor raked to known population totals.</i>
2	Do the changes to the property income question raise the number of persons receiving property income?	Compare the estimate of the number of persons receiving property income between the control and test versions.
3	Do the changes to the property income question raise the estimate of property income?	Compare the mean and median estimate of property income between the test and control versions.
4	Do the changes to the property income question affect the response distribution, shifting the lower part of the distribution towards the mean?	Compare the response distributions between the control and test versions.

No.	Research Questions	Evaluation Measures
5	Do the changes to the property income question lower the item missing data rates?	Compare the item missing data rates between the control and test versions.
6	Do the changes to the property income question reduce response error (i.e., bias) in the estimate of property income reciprocity and property income?	Using data from the Content Test and CFU, compare net difference rates between the control and test versions (based on answers to more detailed content follow-up questions).
7	Do the changes to the property income question lower the estimate of the poverty rate?	Compare a crude estimate of the poverty rate, based on unedited data, between the control and test versions.
8	For each mode of data collection, do the changes to the question affect the item missing data rates, the estimates of reciprocity and property income, or response error (i.e., bias)?	<p>For each mode (mail,CATI,CAPI), compare the item missing data rates, estimates of reciprocity and property income, and response error (i.e., bias) between the control and the test versions.</p> <p><i>Comparisons across modes of data collection cannot be made since measurable differences cannot be attributed strictly to the mode of data collection. Observed differences across modes may also be due to mode specific respondent characteristics and reinterview mode effects (CFU only).</i></p>
9	For each mail response stratum, do the changes to the property income question affect the item missing data rates, the estimates of reciprocity and property income, or response error (i.e., bias)?	For each mail response stratum (high and low), compare the item missing data rates, estimates of reciprocity and property income, and response error (i.e., bias) between the control and the test versions.
10	Does either question version elicit respondent or interviewer behaviors that may contribute to interviewer or respondent error?	Compare the behavior coding results derived from the CARI recordings between the control and the test versions.

**Selection Criteria (In order of priority)**

<b>Research Question(s)</b>	<b>Criteria</b>
1	The overall distribution of property income for the test version should be comparable to that of the CPS ASEC.
2-4	An increase in property income receipt and the amount of property income received in the test version implies a positive change since this item is presumed to be underestimated. The lower part of the distribution should shift higher.
5,6	The item missing data rates and response error (i.e., bias) will be considered together when determining whether the test version performs better.

**Supplemental Information**

<b>Research Question(s)</b>	<b>Criteria</b>
7	Not part of the selection criteria. A crude estimate of poverty rate should show a decrease in the number of households in poverty.
8-10	Not part of the selection criteria. These data are presented to give additional information regarding how the questions performed.

## **Question Wording**

### **Control Version**

Read lead-in only if person was not employed last year: (The next few questions are about income DURING THE PAST 12 MONTHS....)

Q47c1a. Did [<Name>/you] receive any interest, dividends, net rental income, royalty income, or income from estates and trusts [DURING THE PAST 12 MONTHS]? Report even small amounts credited to an account.

Yes

No

Q47c1b. What was the amount received?

\$\_\_\_\_\_.00

### **Test Version**

Q49c1a. [If respondent did not work, Q49c1a is the first question in the income series, and fill: The next few questions are about income DURING THE PAST 12 MONTHS, that is from <DATE> to <DATE> ....]

Did [<Name>/you] receive any interest or dividends [if respondent works, fill: DURING THE PAST 12 MONTHS]? Report even small amounts credited to an account.

Yes

No -> Skip to Q49c2a

Q49c1b. What was the amount?

\$\_\_\_\_\_.00

Q49c2a. Did [<Name>/you] receive any net rental income DURING THE PAST 12 MONTHS?

Yes

No -> Skip to Q49c3a

Net rental income is the total amount after expenses.

Q49c2b. What was the net amount?

\$\_\_\_\_\_00

The net amount is the total amount after expenses.

If income was a loss, precede amount with a '-'. Breakeven = 1.

Q49c3a. Did [<Name>/you] receive any royalty income or income from estates and trusts DURING THE PAST 12 MONTHS?

Yes

No -> Skip to Q49d

Q49c3b. What was the amount?

\$\_\_\_\_\_00



## Appendix E: CFU Questions

### (NOTE: INTEREST QUESTIONS)

#### CPS Q63A1

At anytime in the past 12 months did <name/you> have money in any kind of money market fund, interest earning checking account, or savings account?

- 1 Yes
- 2 No

#### CPS Q63A2

[At anytime in the past 12 months did <name/you>] have any savings bonds?

- 1 Yes
- 2 No

#### CPS Q63A3

[At anytime in the past 12 months did <name/you>] have any treasury notes, IRAs, certificates of deposit, or any other investments which pay interest?

- 1 Yes
- 2 No

#### CPS Q63c

...ONLY ASK IF AT LEAST ONE CPS Q63A1-3 IS A "YES"...

How much did (name/you) receive in interest from these sources in the past 12 months, including even small amounts reinvested or credited to accounts?

- Only include interest received from U.S. Savings Bonds cashed in the past 12 months
  - Separate amounts for joint ownership
- Enter dollar amount
- \_\_\_\_\_

### (NOTE: DIVIDENDS QUESTIONS)

#### CPS Q64A

At anytime in the past 12 months did <name/you> own any shares of stock in corporations (PAUSE) or any mutual fund shares?

- 1 Yes
- 2 No (SKIP TO CPS Q65A1)

#### CPS Q64c

How much did (name/you) receive in dividends from stocks (or mutual funds) in the past 12 months, including dividends that were reinvested?

- Separate amounts for joint ownership
- If already included in previous response, press Enter
- Enter "0" for None
- Enter dollar amount

---

**(NOTE: PROPERTY INCOME QUESTIONS)**

**CPS Q65A1**

In the past 12 months did <name/you> own any land, business property, apartments, or houses which were rented to others?

- 1 Yes
- 2 No

**CPS Q65A2**

[At anytime in the past 12 months did <name/you>] receive income from royalties or from roomers or boarders? (exclude amounts paid by relatives)

- 1 Yes
- 2 No

**CPS Q65A3**

[At anytime in the past 12 months did <name/you>] receive income from estates or trusts? (exclude estates or trusts already reported)

- 1 Yes
- 2 No

**CPS Q65c**

**...ASK ONLY IF AT LEAST ONE Q65A1-3 IS A "YES"...**

How much did (name/you) receive in income from rent (blank /, roomers or boarders, estates, trusts, or royalties/, roomers or boarders, or royalties/, estates or trusts) AFTER EXPENSES in the past 12 months?

- Separate amounts for joint ownership if response is "Broke Even" then enter 1.
  - Enter dollar amount
  - If amount already included in previous response,
    - or if response is "None",
    - or if response is "Lost Money"press <Enter> key
-