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2016 AMERICAN COMMUNITY SURVEY RESEARCH AND EVALUATION REPORT
MEMORANDUM SERIES #ACS16-RER-19

MEMORANDUM FOR	ACS Research and Evaluation Advisory Group
From:	Victoria Velkoff *(signed Victoria Velkoff)* Chief, American Community Survey Office
Prepared by:	Agnes S. Kee Methods Panel Coordination Branch American Community Survey Office
Subject:	Cognitive Testing of the 2016 American Community Survey (ACS) Content Test Items: Briefing Report for Round 2 Interviews

Attached is the final American Community Survey Research and Evaluation report "Cognitive Testing of the 2016 American Community Survey Content Test Items: Briefing Report for Round 2 Interviews." The Census Bureau coordinates the content development and determination process for the ACS, with input from the Office of Management and Budget (OMB) Interagency Committee for the ACS, to identify proposed content changes from the Interagency Council on Statistical Policy (ICSP) Subcommittee on the ACS. The OMB, in consultation with the Census Bureau, establishes new content determinations for the survey. Approved new content or changes to existing content are tested according to the ACS content change process. Changes are pretested using cognitive testing methods before field testing. To evaluate the modifications, the Census Bureau contracted Westat to conduct cognitive testing on the revised questions. Two rounds of testing were completed in total. This report summarizes the results from the second round of cognitive testing from October 24 through November 20, 2014 for the following topics included in the 2016 ACS Content Test.

- Hispanic origin and race
- Telephone service
- Computer and Internet use
- Health insurance
- Cohabitation/domestic partnership
- Commuting mode
- Time of arrival at work
- Number of weeks worked
- Class of worker
- Industry and occupation
- Retirement income

If you have any questions about this report, please contact Agnes Kee at 301-763-1516 or Elizabeth Poehler at 301-763-9305.

Attachment

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Cognitive Testing of the 2016 American Community Survey Content Test Items

Briefing Report for Round 2 Interviews

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Overview 1

The American Community Survey (ACS) continuously collects demographic, economic, housing, and social data from households. These data are invaluable to Federal, state, and local governments, researchers, and businesses. Given the importance of the data and the need to ensure continuity with previous data collections, changes to the ACS are only made after rigorous testing.

In preparation for the 2016 Content Test, the U.S. Census Bureau contracted with the Westat/EurekaFacts team to conduct cognitive testing of new or revised ACS items that address the following topics:

- Hispanic origin and race;

- Telephone service;

- Computer and Internet use;

- Health insurance;

- Cohabitation/domestic partnership;

- Commuting mode;

- Time left for work;

- Number of weeks worked;

- Class of worker;

- Industry and occupation; and

- Retirement income.

Westat's Instrument Design, Evaluation, and Analysis (IDEA) Services and EurekaFacts conducted 208 cognitive interviews for Round 1 of testing between June 17 and August 8, 2014. After reporting on the results of Round 1 to the Census Bureau, research goals and items were revised for a second round of testing. For Round 2 we conducted 120 cognitive interviews to ensure respondent comprehension of a revised series of items in the above list of content domains. This report briefly summarizes the data collection methods and presents the findings and recommendations from the 60 Round 2 cognitive interviews conducted in English and 60 cognitive interviews conducted in Spanish across the United States.

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After discussions with the U.S. Census Bureau about the findings from Round 1 cognitive interviews and a review of revised measurement goals and anticipated issues with each tested item, Westat's Instrument Design, Evaluation, and Analysis (IDEA) Services developed the Round 2 protocols, conducted intensive recruiting to meet the complex requirements for respondent characteristics, and conducted and analyzed 120 interviews.

Protocol Development

We began protocol development by modifying the English language cognitive interview protocols used in Round 1. The protocols included an introduction and informed consent; relevant portions of American Community Survey (ACS) interview (with show cards for the CAPI interviews, where appropriate); detailed interviewer instructions; selection criteria for Persons 2 and 3; the research questions for each tested item; and scripted probes for each tested item.

The item topics were divided into three groups: Group 1 consisted of topics addressing Hispanic origin and race, telephone usage, and computer and Internet access; Group 2 was made up of the health insurance, cohabitation (Spanish only), commuting mode, time left for work, and weeks worked topics; and Group 3 tested the class of worker, industry and occupation, and retirement income topics. We also tested the topics in three survey modes: Paper and interviewer-administered using either the computer-administered personal interview (CAPI) or computer-administered telephone interview (CATI) instrument. The team developed 12 protocols (6 in English, 6 in Spanish), each one tailored to Group (1, 2, or 3) and mode (Paper or CAI (computer-assisted interview), which combined the CAPI and CATI modes).

The probing approach was almost entirely retrospective in Round 2, with nearly all probes administered after all items had been administered for up to three individuals in the household. One probe in the Group 1 CAI protocol (regarding smartphone usage) and one probe in the Group 2 CAI protocol (regarding subsidies) were administered concurrently to gather respondents' immediate feedback on what the question was asking. Once the English language protocols were finalized, Westat's Translation Unit translated them and EurekaFacts reviewed them following the

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Census Bureau's guidelines for translation, including the use of team translation and documentation of all proposed revisions. EurekaFacts also incorporated all probes that were unique to the Spanish language testing.

Recruitment

Over the period spanning from October 20 to November 19, 2014, recruiters from qualitative research facilities in each location screened 448 English-speaking adults and 263 Spanish-speaking adults to determine their eligibility for participation. Potential respondents were first screened to ensure they did not live in group quarters and had not participated in any research focus group or interview in the past 12 months. If not, they were asked a series of additional screening questions to capture overall demographics and specific characteristics of interest for each tested topic. So as not to contaminate the cognitive interview results, we designed new questions (or borrowed questions from existing sources) to screen for the desired characteristics rather than screening with any of the tested ACS questions.

The targeted demographic characteristics for the overall recruitment included a mix of categories for gender, age, education level, and Hispanic origin or race. Topic-specific recruitment targets were set for the English language interviews in order to obtain feedback from respondents with characteristics the Census Bureau felt would make it particularly difficult to interpret or respond to the tested items. Examples of such targeted characteristics included:

- Afro-Latinos, Middle Easterners/North Africans, and multiracial respondents for the race and Hispanic origin items;

- Households accessing the Internet only through a data plan for a cell phone, or only through a WiFi connection for the Internet items;

- Those with health care coverage through a state marketplace for the health insurance items;

- Rail and multimode commuters for the commuting mode item;

- Active duty personnel for the class of worker items; and

- Those collecting retirement income and still working, and those receiving survivor income for the retirement income items.

We also screened the Spanish language respondents for those who spoke little or no English, although this requirement was relaxed for select characteristics such as "multiracial" (Group 1) and insurance purchased directly from an insurance company or the marketplace (Group 2). English interview respondents were primarily native English speakers.

In addition to the topic-specific targets for the Spanish interviews, overall targets were set for each of the following Hispanic origin categories: 30 percent Mexican, 30 percent Central American, 20 percent South American, and 20 percent Puerto Rican and Cuban. Table 2-1 presents the overall targets and completed interviews for each Hispanic origin category.

Table 2-1.   Overall targets and completed Spanish language interviews by Hispanic origin

Country of origin	Overall targets	Completed interviews			
		Group 1	Group 2	Group 3	Total
Mexican	18	7	5	5	17
Central American	18	4	9	3	16
South American	12	5	5	5	15
Puerto Rican, Caribbean, Cuban	12	3	0	6	9
Other (e.g., Dominican)	0	2	0	1	3
Total	60	21	19	20	60

Local facilities used their databases to identify potential respondents, along with recruiting methods such as outreach to community organizations, distribution of flyers in strategic locations (e.g., at cafes, community centers, senior centers, festivals), ad placement on list serves and other social media, and purchased lists. The Westat and Census Bureau teams monitored the recruiting results on a daily basis, reviewing all screened individuals to determine whether they met any of the criteria for any of the targeted characteristics. We assigned a group and mode to those who were eligible and the facility contacted them to schedule an interview. When it appeared that we were falling short on any of the targeted characteristics, we instructed the recruiting facilities to immediately increase their efforts or alter their methods to find respondents with those characteristics.

Based on screening results, we met or exceeded the recruiting goal for every targeted characteristic in both languages except two (the English, Group 3 characteristics of Construction Worker and Day Laborer). The Appendix shows case-by-case screening results separately for English and Spanish, along with decisions about group assignment and aggregate results on key demographic variables.

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Cognitive Interview Administration

On October 21, 2014 Westat held a one-day interviewer training with nine English language interviewers and 10 Spanish language interviewers. The training provided background information about the overall project; summarized the Round 1 results; presented the items for Round 2 testing and associated probes along with all other interview materials and procedures; allowed opportunity to conduct at least one practice interview; and provided detailed instructions for using the interview summary template to write up the findings for each interview.

From October 24 to November 20, 2014 the interviewing team conducted 120 in-person interviews (60 English, 60 Spanish) across seven different cities as shown in Table 2-2. Each interview lasted approximately one hour and respondents were given $40 for their travel expenses. All Round 2 interview materials were reviewed and approved by the Office of Management and Budget and Westat's Insitutional Review Board.

Table 2-2.   Locations and dates of Round 2 interviews

Location	Dates	Number of interviews
English interviews		
Rockville, MD	Oct 29-Nov 20, 2014	18
Chicago, IL	Nov 4-5, 2014	17
Oakland, CA	Nov 12-13, 2014	18
Cleveland, OH	Nov 19-20, 2014	7
Spanish interviews		
Rockville, MD	Oct 24-Nov 18, 2014	24
Chicago, IL	Nov 3-19, 2014	10
Miami, FL	Nov 6-18, 2014	8
New York, NY	Nov 11-12, 2014	11
San Diego, CA	Nov 3-18, 2014	7

Analytic Approach

Analysis of the Round 2 interviews were based on interviewer summaries that included respondents' verbatim answers to the ACS questions and brief but accurate descriptions of responses to the cognitive probes. These summaries were imported into NVivo, a text-based relational database for managing and analyzing large amounts of qualitative data. Westat and EurekaFacts team members then coded the summaries using a scheme that incorporated survey response process issues (e.g., comprehension, recall) and the item specific research questions that appeared in the protocols (e.g., how helpful were the examples provided with some of the items). Once all summaries were coded,

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numerous algorithms were run in NVivo to conduct a comprehensive analysis of responses to each tested ACS item.

Analysis focused primarily on those respondents whose descriptions in the follow-up probes suggested they had incorrectly answered an ACS item. This approach allowed us to pinpoint the number of respondents who had problems with each item and determine if those respondents shared any salient characteristics (e.g., if respondents who double-counted their insurance were more likely to be covered by Medicaid). One challenge, however, was that respondents' answers to the screening questions, which formed the basis for assigning them to one of the three groups, were sometimes different from their answers to the ACS questions related to those same targeted characteristics. For example, nine respondents who, at screening, told us they had marketplace insurance, were assigned to and scheduled for a Group 2 interview. In analyzing their results, however, it became clear that only three of them actually had marketplace insurance. Where we found such discrepancies, we updated the targeted characteristics to reflect respondents' answers to the ACS questions. Thus, for example, six of the nine individuals who screened in as having marketplace insurance were excluded from our analysis of how well the marketplace insurance item worked. This reconciliation strategy also sometimes resulted in the number of respondents with a particular characteristic dropping below the screening goal for that characteristic.

Tables 2-3, 2-4, and 2-5 show, for each of the three topic groups and by language and mode, the number of respondents with targeted characteristics based on how they answered the ACS questions and probes. The tables are color coded by group (red for Group 1, yellow for Group 2, green for Group 3). Although every effort was made to match screened respondents to at least one targeted characteristic, not all respondents ended up falling into one of the targeted categories. At the same time, many respondents fit more than one targeted characteristic. As the table shows, the categories of targeted characteristics were slightly different for English and Spanish respondents.

Table 2-3. Number of respondents with Group 1 targeted characteristics by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
Hispanic origin and race	Afro-Latino	3	4	2	2	1	1	0	1
	MENA	4	NA	2	NA	1	NA	1	NA
	Multiracial	7	14	5	8	0	3	2	3
	Foreign born w/ children born in U.S.	5	13	4	9	0	3	1	1
Computer and Internet use	Internet access via data plan only	3	8	1	3	1	3	1	2
	WiFi-only access	0	1	0	0	0	0	0	1

Table 2-4. Number of respondents with Group 2 targeted characteristics by language and mode

		Total		Paper		CAPI*	
		English	Spanish	English	Spanish	English	Spanish
Health insurance	Medicaid	5	9	2	5	3	4
	State-based marketplace users (CA, MD, DC)	2	1	1	1	1	0
	Insurance purchased directly (NOT employer based)	2	0	1	0	1	0
Cohabitation and domestic partnership	Unmarried couples (same or opposite sex)	NA	3	NA	1	NA	2
Journey to work - commuting mode	Rail commuters	7	3	3	2	4	1
	Multimode	7	6	3	2	4	4
Journey to work - time left for work	Make stops	5	6	2	1	3	5
	Travel for business	10	4	4	1	6	3
	Varying shift	7	10	6	5	1	5
Number of weeks worked	Inconsistent work in the last 12 months	9	8	5	4	4	4

*All Group 2 CAI interviews were conducted with the CAPI script to maximize the number of respondents exposed to the telephone question (which CATI respondents do not receive) and the show card for the commuting mode response options (the commuting mode question is open-ended in CATI).

Table 2-5. Number of respondents with Group 3 targeted characteristics by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
Class of worker	Self-employed	6	2	2	2	1	0	3	0
	State or local government	4	NA	2	NA	1	NA	1	NA
	More than one job	2	2	2	1	0	1	0	0
	Unpaid family worker	0	0	0	0	0	0	0	0
	Active duty	2	NA	1	NA	1	NA	0	NA
Industry and occupation	Protective service	4	NA	2	NA	1	NA	1	NA
	Manager	0	NA	0	NA	0	NA	0	NA
	Construction worker	0	3	0	1	0	1	0	1
	Day laborer	0	1	0	0	0	1	0	0
Retirement income	Retired with SIMPLE, Keogh, or SEP	1	NA	0	NA	1	NA	0	NA
	Retirement income and still working	7	NA	2	NA	2	NA	3	NA
	Survivor income	2	NA	2	NA	0	NA	0	NA
	Workers (non-retirement age)/left job where contributed to retirement	4	NA	2	NA	1	NA	1	NA
	Any retirement income (SSI only, SSI and other, other only)	NA	9	NA	5	NA	3	NA	1

About This Report

The report presents key findings from the research questions and scripted probes as well as unanticipated issues that arose spontaneously during the interviews. Because not all respondents received all tested questions, nor did all respondents receive all the probes, denominators throughout the report shift. Missing data rates were higher among the Spanish than English language respondents. In particular, interviewers noticed that the almost one third (17) of Spanish respondents with less than a high school education tended to take longer completing the ACS, in some cases leaving little time for administering the probes.

Six-digit numbers are provided next to all summary excerpts to identify the particular respondent associated with the remark, along with the mode and language of the respondent. Those portions of the excerpts that occur within quotation marks represent respondents' verbatim statements.

Executive Summary Tables

The Executive Summary Tables that follow show the wording of all tested items, with recommendations shown with yellow highlighting.

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3.1 Hispanic Origin/Race

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Which categories describe Person 1? *Mark all boxes that apply* **AND** ***print details*** *in the spaces below.* **White –** ***Print details***, *for example, German, Irish, English,* Cuban, or something else. _____ **Hispanic, Latino, or Spanish origin –** ***Print details***, *for example, Mexican or Mexican American, Puerto Rican, Colombian,* Guatemalan, or something else. _____ **Black or African Am. –** ***Print details***, *for example, African American, Jamaican, Nigerian,* Dominican, or something else. _____ **Asian –** ***Print details***, *for example, Chinese, Asian Indian, Vietnamese,* or something else. _____ **American Indian or Alaska Native –** ***Print details***, *for example, Navajo Nation, Mayan, Chevak Native Village,* or something else. _____ **Middle Eastern or North African –** ***Print details***, *for example, Lebanese, Iranian, Egyptian,* or something else. _____	**¿Cuáles de estas categorías describen a la Persona 1?** *Marque todas las casillas que apliquen* **Y escriba** *en los siguientes espacios su categoría específica.* **Blanco(a) –** ***Especifique***, *por ejemplo, alemán, irlandés, inglés,* cubano, etc. _____ **Origen hispano, latino o español –** ***Especifique***, *por ejemplo, mexicano o mexicano americano, puertorriqueño, colombiano,* guatemalteco, etc. _____ **Negro(a) o afroamericano(a) –** ***Especifique***, *por ejemplo, afroamericano, jamaicano, nigeriano,* dominicano, etc. _____ **Asiático(a) –** ***Especifique***, *por ejemplo, chino, indio asiático, vietnamita,* etc. _____ **Indígena de las Américas o nativo(a) de Alaska –** ***Especifique***, *por ejemplo, Navajo Nation, Maya, Chevak Native Village,* etc. _____ **Del Medio Oriente o del Norte de África –** ***Especifique***, *por ejemplo, libanés, iraní, egipcio,* etc. _____	Keep the reference to "categories" rather than "race or origin." ■ The revised Hispanic origin and race item tested well in all three modes among the 41 Round 2 respondents. Respondents appeared to interpret the question as intended, and 33 out of 41 provided an answer that matched how they described themselves during subsequent probing. Bold the text "**print details**" in order to provide greater emphasis that this task is not optional. ■ While all CAI respondents provided an answer to the detailed category, slightly more than one-third of respondents in the Paper mode left the box blank. Update the examples to reflect origins that more obviously apply to Hispanics. ■ Among 23 Hispanic respondents in both languages and across modes, 4 respondents reported only one category when in fact more than one category applied to them. This often happened because they didn't find their origin in the examples. Note that 6 Hispanic respondents accurately answered with more than one category and 13 accurately responded with a single category.

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Native Hawaiian or Other Pacific Islander – *Print details*, *for example, Native Hawaiian, Guamanian or Chamorro, Fijian, or something else*. _____ **Some other race or origin –** *Print details*. _____	**Nativo(a) de Hawaii o de otra de las islas del Pacífico –** *Especifique*, *por ejemplo, Nativo de Hawaii, guameño o Chamorro, fiyiano, etc*. _____ **Alguna otra raza u origen –** *Especifique*. _____	■ Add "Cuban" to the White category to emphasize that White is not just intended to mean European; ■ Add "Guatemalan" to the Hispanic category so that a Central American country is represented; ■ Add "Dominican" to the Black category to encourage Afro-Latinos to mark both Black and Hispanic. Add back a "closing" phrase ("or something else") to enhance verbal administration of the examples list and to emphasize that the list is not exhaustive. ■ In Round 1, we recommended removing the phrase "and so on" from the end of the examples list as it was redundant with the phrase "for example" and was too vague an instruction for encouraging respondents to think beyond that specific list. In Round 2, we observed 10 respondents across all modes and languages interpreting the list of examples as exhaustive. We also noticed that in the CAI administration, the list of examples seemed to end too abruptly without some extending phrase at the end. We believe the phrase "or something else" more explicitly encourages respondents to think of other examples than does the phrase "and so on." In Spanish, the phrase "etc." (which was also used in Round 1) continues to be the best translation for extending the list of examples. For mode consistency, we recommend also adding this phrase in the paper mode. Retain the current order of the categories and the MENA category. ■ Respondents tended to not pay attention to the order, though 4 respondents thought alphabetical ordering could be a viable alternative. ■ As in Round 1, MENA respondents were pleased to see this category and they used it for their responses.

CATI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
I'm going to read a list of categories. You may choose all that apply. **<Is (Name)/Are you> White; Hispanic, Latino, or Spanish origin; Black or African American; Asian; American Indian or Alaska Native; Middle Eastern or North African; Native Hawaiian or Other Pacific Islander; or Some other race or origin?** White Hispanic, Latino, or Spanish origin Black or African American Asian American Indian or Alaska Native Middle Eastern or North African Native Hawaiian or Other Pacific Islander Some other race or origin **You said that <(Name) is/you are>:** **WHITE** **HISPANIC, LATINO, OR SPANISH** **BLACK OR AFRICAN AMERICAN** **ASIAN** **AMERICAN INDIAN OR ALASKA NATIVE** **MIDDLE EASTERN OR NORTH AFRICAN** **NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER** **SOME OTHER RACE** Now, I'm going to collect detailed information. You may give more than one response. **What are <(Name)'s/your> specific categories for WHITE? For example, German, Irish, English, Cuban, or something else.** _____	**Voy a leer una lista de categorías. Puede seleccionar todas las que se aplican.** **¿Es <(Name)/usted> blanco(a); de origen hispano, latino o español; negro(a) o afroamericano(a); asiático(a); indígena de las Américas o nativo(a) de Alaska; del Medio Oriente o del Norte de África; nativo(a) de Hawaii o de otra de las islas del Pacífico; o de alguna otra raza u origen?** Blanco(a) De origen hispano, latino o español Negro(a) o afroamericano(a) Asiático(a) Indígena de las Américas o nativo(a) de Alaska Del Medio Oriente o del Norte de África Nativo(a) de Hawaii o de otra de las islas del Pacífico Alguna otra raza u origen **Usted dijo que <(Name)/usted> es:** **BLANCO(A)** **DE ORIGEN HISPANO, LATINO O ESPAÑOL** **NEGRO(A) O AFROAMERICANO(A)** **ASIÁTICO(A)** **INDÍGENA DE LAS AMÉRICAS O NATIVO(A) DE ALASKA** **DEL MEDIO ORIENTE O DEL NORTE DE ÁFRICA** **NATIVO(A) DE HAWAII O DE OTRA DE LAS ISLAS DEL PACÍFICO** **ALGUNA OTRA RAZA** **Ahora voy a recopilar información detallada. Usted puede proveer más de una respuesta.**	Same recommendations as Paper mode, unless not applicable to CATI.

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What are <(Name)'s/your> specific categories for HISPANIC, LATINO, OR SPANISH origin? For example, Mexican or Mexican American, Puerto Rican, Colombian, Guatemalan, or something else. _____	¿Cuáles son las categorías específicas para la respuesta de BLANCO(A) de <(Name)/usted>? Por ejemplo, alemán, irlandés, inglés, cubano, etc. _____	
What are <(Name)'s/your> specific categories for BLACK OR AFRICAN AMERICAN? For example, African American, Jamaican, Nigerian, Dominican, or something else. _____	¿Cuáles son las categorías específicas para la respuesta de HISPANO, LATINO O ESPAÑOL de <(Name)/usted>? Por ejemplo, mexicano o mexicano americano, puertorriqueño, colombiano, guatemalteco, etc. _____	
What are <(Name)'s/your> specific categories for ASIAN? For example, Chinese, Asian Indian, Vietnamese, or something else. _____	¿Cuáles son las categorías específicas para la respuesta de NEGRO(A) O AFROAMERICANO(A) de <(Name)/usted>? Por ejemplo, afroamericano, jamaicano, nigeriano, dominicano, etc. _____	
What are <(Name)'s/your> specific categories for AMERICAN INDIAN OR ALASKA NATIVE? For example, Navajo Nation, Mayan, Chevak Native Village, or something else. _____	¿Cuáles son las categorías específicas para la respuesta de ASIÁTICO(A) de <(Name)/usted>? Por ejemplo, chino, indio asiático, vietnamita, etc. _____	
What are <(Name)'s/your> specific categories for MIDDLE EASTERN OR NORTH AFRICAN? For example, Lebanese, Iranian, Egyptian, or something else. _____	¿Cuáles son las categorías específicas para la respuesta de INDÍGENA DE LAS AMÉRICAS O NATIVO(A) DE ALASKA de <(Name)/usted>Por ejemplo, Navajo Nation, Maya, Chevak Native Village, etc. _____	
What are <(Name)'s/your> specific categories for NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER? For example, Native Hawaiian, Guamanian or Chamorro, Fijian, or something else. _____	¿Cuáles son las categorías específicas para la respuesta de DEL MEDIO ORIENTE O DEL NORTE DE ÁFRICA de <(Name)/usted>? Por ejemplo, libanés, iraní, egipcio, etc. _____	
What are <(Name)'s/your> specific categories for OTHER RACE OR ORIGIN? _____	¿Cuáles son las categorías específicas para la respuesta de NATIVO(A) DE HAWAII O DE OTRA DE LAS ISLAS DEL PACÍFICO de	

CATI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
	<(Name)/usted>? Por ejemplo, Nativo de Hawaii, guameño o Chamorro, fiyiano, ==etc==. _____ **¿Cuáles son las categorías específicas para la respuesta de ALGUNA OTRA RAZA U ORIGEN de <(Name)/usted>?** _____	

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Please look at Card B and choose all categories that apply. **<Is (Name)/Are you> White; Hispanic, Latino, or Spanish origin; Black or African American; Asian; American Indian or Alaska Native; Middle Eastern or North African; Native Hawaiian or Other Pacific Islander; or Some other race or origin?** **(Card B shows what is listed below)** **Choose all categories that apply.** **White** – *For example, German, Irish, English, ==Cuban, or something else==.* **Hispanic, Latino, or Spanish origin** – *For example, Mexican or Mexican American, Puerto Rican, Colombian, ==Guatemalan or something else==.* **Black or African American** – *For example, African American, Jamaican, Nigerian, ==Dominican, or something else==.* **Asian** – *For example, Chinese, Asian Indian, Vietnamese, ==or something else==.* **American Indian or Alaska Native** – *For example, Navajo Nation, Mayan, Chevak Native Village, ==or something else==.*	**Por favor, vea la Tarjeta B y seleccione todas las categorías que apliquen.** **¿Es <(Name)/usted> blanco(a); de origen hispano, latino o español; negro(a) o afroamericano(a); asiático(a); indígena de las Américas o nativo(a) de Alaska; del Medio Oriente o del Norte de África; Nativo(a) de Hawaii o de otra de las islas del Pacífico; o de alguna otra raza u origen?** **(Card B shows what is listed below)** **SELECCIONE TODAS LAS CATEGORÍAS QUE APLIQUEN.** **Blanco(a)** – *Por ejemplo, alemán, irlandés, inglés, ==cubano, etc==.* **Origen hispano, latino o español** – *Por ejemplo, mexicano o mexicano americano, puertorriqueño, colombiano, ==guatemalteco, etc==.* **Negro(a) o afroamericano(a)** – *Por ejemplo, afroamericano, jamaicano, nigeriano, ==dominicano, etc==.* **Asiático(a)** – *Por ejemplo, chino, indio asiático, vietnamita, ==etc==.* **Indígena de las Américas o Nativo(a) de Alaska**	Same recommendations as Paper mode, unless not applicable to CAPI.

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Middle Eastern or North African – *For example, Lebanese, Iranian, Egyptian, or something else.* **Native Hawaiian or Other Pacific Islander** – *For example, Native Hawaiian, Guamanian or Chamorro, Fijian, or something else.* **Some other race or origin** **You said that <(Name) is/you are>:** **WHITE** **HISPANIC, LATINO, OR SPANISH** **BLACK OR AFRICAN AMERICAN** **ASIAN** **AMERICAN INDIAN OR ALASKA NATIVE** **MIDDLE EASTERN OR NORTH AFRICAN** **NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER** **SOME OTHER RACE OR ORIGIN** **Now, I'm going to collect detailed information. You may give more than one response.** **What are <(Name)'s/your> specific categories for WHITE? For example, German, Irish, English, Cuban, or something else.** **What are <(Name)'s/your> specific categories for HISPANIC, LATINO, OR SPANISH? For example, Mexican or Mexican American, Puerto Rican, Colombian, Guatemalan, or something else.** **What are <(Name)'s/your> specific categories for BLACK OR AFRICAN AMERICAN? For example, African American, Jamaican, Nigerian, Dominican, or something else.**	*– Por ejemplo, Navajo Nation, Maya, Chevak Native Village, etc.* **Del Medio Oriente o del Norte de África** – *Por ejemplo, libanés, iraní, egipcio, etc.* **Nativo(a) de Hawaii o de otra de las islas del Pacífico** – *Por ejemplo, Nativo de Hawaii, guameño o Chamorro, fiyiano, etc.* **Alguna otra raza u origen** **Usted dijo que <(Name)/usted> es:** **BLANCO(A)** **DE ORIGEN HISPANO, LATINO O ESPAÑOL** **NEGRO(A) O AFRICANO(A) AMERICANO(A)** **ASIÁTICO(A)** **INDÍGENA DE LAS AMÉRICAS O NATIVO(A) DE ALASKA** **DEL MEDIO ORIENTE O DEL NORTE DE ÁFRICA** **NATIVO(A) DE HAWAII O DE OTRA DE LAS ISLAS DEL PACÍFICO** **ALGUNA OTRA RAZA O ORIGEN** **Ahora voy a recopilar información detallada. Usted puede proveer más de una respuesta.** **¿Cuáles son las categorías específicas para la respuesta de BLANCO de <(Name)/usted>? Por ejemplo, alemán, irlandés, inglés, cubano, etc.** **¿Cuáles son las categorías específicas para la respuesta de HISPANO, LATINO O ESPAÑOL de <(Name)/usted>? Por ejemplo, mexicano o mexicano americano, puertorriqueño, colombiano, guatemalteco, etc.**	

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What are <(Name)'s/your> specific categories for ASIAN? For example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, Japanese, or something else. What are <(Name)'s/your> specific categories for AMERICAN INDIAN OR ALASKA NATIVE? For example, Navajo Nation, Mayan, Chevak Native Village, or something else. What are <(Name)'s/your> specific categories for MIDDLE EASTERN OR NORTH AFRICAN? For example, Lebanese, Iranian, Egyptian, or something else. What are <(Name)'s/your> specific categories for NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER? For example, Native Hawaiian, Guamanian or Chamorro, Fijian, or something else. What are <(Name)'s/your> specific categories for SOME OTHER RACE OR ORIGIN?	¿Cuáles son las categorías específicas para la respuesta de NEGRO O AFROAMERICANO de <(Name)/usted>? Por ejemplo, afroamericano, jamaicano, nigeriano, dominicano, etc. ¿Cuáles son las categorías específicas para la respuesta de ASIÁTICO de <(Name)/usted>? Por ejemplo, chino, indio asiático, vietnamita, etc. ¿Cuáles son las categorías específicas para la respuesta de INDÍGENA DE LAS AMÉRICAS O NATIVO DE ALASKA de <(Name)/usted>? Por ejemplo, Navajo Nation, Maya, Chevak Native Village, etc. ¿Cuáles son las categorías específicas para la respuesta DEL MEDIO ORIENTE O DEL NORTE DE ÁFRICA de <(Name)/usted>? Por ejemplo, libanés, iraní, egipcio, etc. ¿Cuáles son las categorías específicas para la respuesta de NATIVO DE HAWAII O DE OTRA DE LAS ISLAS DEL PACÍFICO de <(Name)/usted>? Por ejemplo, Nativo de Hawaii, guameño o Chamorro, fiyiano, etc. ¿Cuáles son las categorías específicas para la respuesta de ALGUNA OTRA RAZA U ORIGEN de <(Name)/usted>?	

3.2 Telephone Service

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
At this house, apartment or mobile home, can you or any member of this household both make and receive phone calls? ~~At this house, apartment, or mobile home – do you or any member of this household have telephone service from which you can both make and receive calls?~~ *Include voice service from a telephone company, cell or mobile phone provider, cable company, or any other voice provider.* Yes No	**En esta casa, apartamento o casa móvil, ¿puede usted o algún miembro del hogar hacer y recibir llamadas telefónicas?** ~~En esta casa, apartamento o casa móvil, ¿tiene usted o algún miembro del hogar servicio telefónico con el cual se puedan hacer y recibir llamadas?~~ *Incluya servicios de voz de una compañía telefónica, proveedor de teléfono celular o móvil, compañía de cable o cualquier otro proveedor de servicios de voz.* Sí No	Remove mention of types of telephone service from the question so that respondents are focused on what it's really asking, which is their ability to contact emergency services from their homes and communicate with others over the phone. ■ The current question focuses on types of telephone service, which are becoming increasingly more varied and complex. Attempting to encompass all types in a lengthy instruction is burdensome for respondents to read and introduces potential response error from those who may become confused about what type of service the question is asking about. ■ In both Rounds 1 and 2, we observed two respondents with cell service only misreporting because they interpreted the question as asking about landline service only. This problem is likely to increase as more of the U.S. population switches to cell service only. Removing mention of types of telephone service is one strategy for addressing response error such as this. If the current question format is retained, use the phrase "cell phone" or "cellular phone" without "mobile". Use the same term across the telephone and Internet access questions. ■ Both English and Spanish respondents tended to use "cell" when describing in their own words how they make calls. ■ Our expert reviewers recommend choosing only one term, to reduce both question length and cognitive burden.

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
		■ The word "mobile" is currently used in three different contexts within the Housing section – mobile phone provider, mobile home, mobile broadband. Using "cell" at the telephone service question eliminates one of those which may in turn reduce cognitive burden. Retain the telephone question in its current position relative to the computer/Internet questions. ■ Findings from Round 1, in which we tested the telephone question appearing both before and after the computer/Internet questions, did not point to either order having an impact on response. Round 2 testing produced no evidence that respondents in the Paper mode thought the telephone service question was redundant with the subsequent computer/Internet questions.

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
At this [house/apartment/mobile home/unit] – can you or any member of this household both make and receive phone calls? do you or any member of this household have telephone service from which you can both make and receive calls? Include voice service from a telephone company, cell or mobile phone provider, cable company, or any other voice provider. Yes No	En {esta casa/este apartamento/esta casa móvil/ esta vivienda}, ¿puede usted o algún miembro del hogar hacer y recibir llamadas telefónicas? En [esta casa/este apartamento/esta casa móvil/ esta vivienda], ¿tiene usted o algún miembro del hogar servicio telefónico con el cual se puedan hacer y recibir llamadas? Incluya servicios de voz de una compañía telefónica, proveedor de teléfono celular o móvil, compañía de cable o cualquier otro proveedor de servicios de voz. Sí No	Same recommendations as Paper mode. In addition, for consistency with the Paper mode, move the question from its current position immediately before the Internet access questions to immediately after the facilities questions.

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3.3 Computer and Internet

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
At this house, apartment, or mobile home – do you or any member of this household own or use any of the following types of computers? Desktop or laptop (Yes/No) Smartphone (Yes/No) Tablet or other portable wireless computer (Yes/No) Some other type of computer (Yes/No) *Specify*_____ -- **At this house, apartment, or mobile home – do you or any member of this household have access to the Internet?** Yes, by paying a cell phone company or Internet service provider Yes, without paying a cell phone company or Internet service provider (SKIP to next page) No ~~Internet~~ access ~~to the Internet~~ at this house, apartment, or mobile home (SKIP to next page) -- ~~At this house, apartment, or mobile home –~~ **D**o you or any member of this household **have** access **to** the Internet using – Cellular data such as mobile broadband, 4G or LTE for a smartphone or other mobile device ~~Mobile broadband Internet service for a smartphone or other mobile device~~? (Yes/No)	**En esta casa, apartamento o casa móvil, ¿tiene o usa usted o algún otro miembro de este hogar alguno de los siguientes tipos de computadoras?** Computadora de escritorio o *laptop* ~~computadora portátil~~ (Sí/No) *Smartphone* (Sí/No) Tableta u otra computadora de mano inalámbrica (Sí/No) Algún otro tipo de computadora (Sí/No) *Especifique*_____ -- **En esta casa, apartamento o casa móvil, ¿ tiene ~~accede~~ usted o algún otro miembro de este hogar acceso a la Internet?** Sí, por pagando a una compañía de teléfonos celulares o proveedor de servicio de Internet Sí, sin pagando a una compañía de teléfonos celulares o proveedor de servicio de Internet (PASE A la siguiente página) No hay acceso a Internet en esta casa, apartamento o casa móvil (PASE A la siguiente página) -- ~~En esta casa, apartamento o casa móvil,~~ **¿ Tiene ~~accede~~ usted o algún otro miembro de este hogar acceso a la Internet a través de – Datos celulares, como banda ancha móvil (*mobile broadband*), 4G o LTE para un *smartphone* u otro aparato móvil?** ~~Servicio de Internet de banda ancha móvil (*mobile broadband*) para un *smartphone* u otro aparato móvil?~~ (Sí/No)	Use "have access to the Internet" instead of "access the Internet." ■ Four respondents answered the question thinking about their habits of Internet use at home rather than focusing on their actual ability to access the Internet at their house. We anticipate this becoming more of an issue as Internet access technology grows increasingly mobile. We further believe that "have access to the Internet" more accurately conveys the intent of this question. Skip respondents who answer "yes, without paying" past the subsequent question about types of access. ■ Since one of the Round 1 revisions from Round 1 was to add cell phone plans into the Internet access question, those who are saying they do not pay a cell phone company or Internet service provider do not need to be asked what type of access they have in their household because they will be accessing open or publicly available Internet services such as their neighbor's WiFi, an Internet café, or a community-wide Internet service. Remove the phrase "at this house, apartment or mobile home" from question 12 (types of Internet access) and add "installed in this household" to the end of the broadband high speed, satellite, and dial-up categories. ■ Most respondents misunderstood the terms mobile broadband or broadband (high speed). This suggestion should help respondents more easily differentiate between smartphone data plans, which are not tied specifically to a place,

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Broadband (high speed) Internet service ~~installed in this house, apartment, or mobile home~~, such as cable, fiber optic, or DSL service installed in this household? (Yes/No) Satellite Internet service installed in this household? (Yes/No) Dial-up Internet service installed in this household? (Yes/No) Some other service? (Yes/No) *Specify service* _____	Servicio de Internet de *broadband* ~~banda ancha~~ (alta velocidad) ~~instalada en esta casa, apartamento o casa móvil,~~ tales como servicio de cable, fibra óptica, o *DSL* instalado en este hogar? (Sí/No) Servicio de Internet por satélite instalado en este hogar? (Sí/No) Servicio de Internet de conexión *Dial Up* instalado en este hogar? (Sí/No) Algún otro servicio? (Sí/No) *Especifique el servicio* _____	and other ways of having access to the Internet that <u>are</u> tied to a place. Redesign the mobile broadband category to put less emphasis on duplicative use of the term "broadband." ■ Most respondents misunderstood the term "mobile broadband" and at least 8 (4 English, 4 Spanish) answered incorrectly because of their misinterpretation. Some also confused it with the broadband (high speed) category. ■ We suggest using a phrase such as "cellular data" that more obviously differentiates this category from the broadband (high speed) category. Also, 17 respondents (10 English, 7 Spanish) used the terms 3G, 4G, or LTE to describe the way they access the Internet on their smartphones. Therefore, our suggested revision includes terminology that respondents themselves use to describe their smartphone data plans. Move the examples for broadband (high speed) closer to the beginning of that category. ■ To increase the likelihood that respondents will notice the examples, and to match the suggested formatting for the mobile broadband category (with examples immediately following the category name) and the other two categories (with "installed in this household" appearing at the end), we suggest moving the examples of cable, fiber optic, and DSL immediately after "broadband or high speed Internet service." ■ In Spanish, we recommend using the English term "broadband" rather than "banda acha." In combination with "alta velocidad," we think this will produce higher recognition and understanding.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
At this <house/apartment/mobile home/unit>, do you or any member of this household own or use a desktop or laptop computer? Yes No At this <house/apartment/mobile home/unit>, **Do you or any member of this household own or use a smartphone?** Yes No At this <house/apartment/mobile home/unit>, **Do you or any member of this household own or use a tablet or other portable wireless computer?** Yes No At this <house/apartment/mobile home/unit>, **Do you or any member of this household own or use some other type of computer?** Yes No **What is this other type of computer?** _____ -- ~~**At this <house/apartment/mobile home/unit>, do you or any member of this household pay for a plan for a smartphone or mobile device to access the Internet and make phone calls?** Yes (Skip to Internet Access) No~~	**En <esta casa/este apartamento/esta casa móvil/esta vivienda>, ¿tiene o usa usted o algún otro miembro de este hogar una computadora de escritorio o laptop ~~computadora portátil~~)?** Sí No En <esta casa/este apartamento/esta casa móvil/esta vivienda>, **¿Tiene o usa usted o algún otro miembro de este hogar una smartphone?** Sí No En <esta casa/este apartamento/esta casa móvil/esta vivienda>, **¿Tiene o usa usted o algún otro miembro de este hogar una tableta u otra computadora de mano inalámbrica?** Sí No En <esta casa/este apartamento/esta casa móvil/esta vivienda>, **¿Tiene o usa usted o algún otro miembro de este hogar algún otro tipo de computadora?** Sí No **¿Cuál es este otro tipo de computadora?** _____ -- ~~**En <esta casa/este apartamento/esta casa móvil/esta vivienda>, ¿paga usted o algún otro miembro de este hogar por un plan para un *smartphone* o aparato móvil**~~	Same recommendations as Paper mode, along with the following additional recommendations. Remove the phrase "at this house, apartment or mobile home" from question 12 (types of Internet access) and use "installed in this <house/apartment/mobile home/unit" at the end of the broadband high speed, satellite, and dial-up categories. Eliminate the CAI question about smartphone data plans. This would also require adding 'smartphone' to the CAI question about computer devices. ■ This question is cognitively difficult to process and introduces a high likelihood of response error among those whose situations do not exactly match all four parts of this question. Almost all Round 2 respondents with smartphones also paid for Internet data plans, which is the most common situation for those with smartphones. While all of them answered the question correctly, over three-quarters of them were unable to tend to all parts of the question. The one respondent with an atypical situation – she had a smartphone but did not pay for a data plan on it – answered 'yes' when she should have said 'no'. ■ The Census Bureau will be able to more accurately measure use of paid smartphone data plans by combining data from the questions on computer devices (which asks about smartphones in a separate category), internet access (which asks about paying a cell phone or Internet service provider for Internet access), and

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
~~<Telephone Service question here>~~ At this <house/apartment/mobile home/unit>, do you or any member of this household ==have== access ==to== the Internet? Yes No (Skip to ~~next~~ ==vehicle== question) At this <house/apartment/mobile home/unit>, Do you or any member of this household pay a cell phone company or Internet service provider to access the Internet? Yes No ==(Skip to vehicle question)== -- ~~At this <house/apartment/mobile home/unit>,~~ ~~d~~==D==o you or any member of this household access the Internet using ==cellular data such as mobile broadband, 4G or LTE for a smartphone or other mobile device== ~~mobile broadband Internet service for a smartphone or other mobile device~~? Yes No At this <house/apartment/mobile home/unit>, Do you or any member of this household access the Internet using broadband or high speed Internet service such as cable, fiber optic, or DSL service ==installed in this <house/apartment/mobile home/unit>==? Yes No	~~para acceder a la Internet y para hacer llamadas?~~ ~~Sí (Skip to Internet Access)~~ ~~No~~ En <esta casa/este apartamento/esta casa móvil/esta vivienda>, ¿==tiene== ~~accede~~ usted o algún otro miembro de este hogar ==acceso== a la Internet? Sí No ==(Skip vehicle question)== En <esta casa/este apartamento/esta casa móvil/esta vivienda>, ¿Paga usted o algún otro miembro de este hogar a una compañía de teléfonos celulares o proveedor de servicio de Internet para acceder a la Internet? Sí No ==(Skip vehicle question)== -- ==¿Accede usted o algún otro miembro de este hogar a la Internet usando datos celulares, como banda ancha móvil (*mobile broadband*), 4G o LTE para un *smartphone* u otro aparato móvil?== ~~En <esta casa/este apartamento/esta casa móvil/esta vivienda>, ¿accede usted o algún otro miembro de este hogar a la Internet usando un servicio de Internet de banda ancha móvil (mobile broadband) para un smartphone u otro aparato móvil?~~ Sí No En <esta casa/este apartamento/esta casa móvil/esta vivienda>, ¿Accede usted o algún otro miembro de este hogar a la Internet usando servicio de Internet de *broadband* ~~banda ancha~~ o alta velocidad ~~instalada en~~ <esta casa/este apartamento/esta casa móvil/esta	type of internet access (which asks about mobile broadband plans in a separate category). For consistency with the Paper mode, move the telephone question from its current position immediately before the Internet access questions to immediately after the facilities questions.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
~~At this <house/apartment/mobile home/unit>,~~ **Do you or any member of this household access the Internet using a satellite Internet service installed in this <house/apartment/mobile home/unit>?** Yes No	~~vivienda>,~~ tales como servicio de cable, fibra óptica, o *DSL* **instalado en <esta casa/este apartamento/esta casa móvil/esta vivienda>?** Sí No	
~~At this <house/apartment/mobile home/unit>,~~ **Do you or any member of this household access the Internet using a dial-up Internet service installed in this <house/apartment/mobile home/unit>?** Yes No	~~En <esta casa/este apartamento/esta casa móvil/esta vivienda>,~~ **¿Accede usted o algún otro miembro de este hogar a la Internet usando un servicio de Internet por satélite instalado en <esta casa/este apartamento/esta casa móvil/esta vivienda>??** Sí No	
~~At this <house/apartment/mobile home/unit>,~~ **Do you or any member of this household access the Internet using some other service?** Yes No **What is this other type of Internet service?** _____	~~En <esta casa/este apartamento/esta casa móvil/esta vivienda>,~~ **¿Accede usted o algún otro miembro de este hogar a la Internet usando servicio de Internet de conexión *Dial Up* instalado en <esta casa/este apartamento/esta casa móvil/esta vivienda>??** Sí No	
	~~En <esta casa/este apartamento/esta casa móvil/esta vivienda>,~~ **¿Accede usted o algún otro miembro de este hogar a la Internet usando algún otro servicio?** Sí No **¿Cuál es este otro tipo de servicio de Internet?** _____	

3.4 Health Insurance, Premium and Subsidy

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Is this person CURRENTLY covered by any of the following types of health insurance or health coverage plans? *Mark "Yes" or "No" for EACH type of coverage in items a – h.* *Do NOT include plans that cover only one type of service, such as dental, drug or vision plans.* a. Insurance through a current or former employer or union (of this person or another family member) b. Medicare, for people 65 and older, or people with certain disabilities c. Medicaid, Medical Assistance, or any kind of state or government-assistance plan for those with low income d. Insurance purchased directly from an insurance company or through a State or Federal Marketplace, health care.gov, or a similar state website (by this person or another family member) e. TRICARE or other military health care f. VA (including those who have ever used or enrolled for VA health care) g. Indian Health Service h. Any other type of health insurance NOT listed above – ~~Specify~~ *Name of plan* _____ --- **Answer questions 16a and 16b if you marked "Yes" in question 15d. Otherwise, SKIP to question 17**	**¿Tiene esta persona cobertura ACTUALMENTE de cualquiera de los siguientes tipos de seguros de salud o planes de cobertura de seguro de salud?** *Marque "Sí" o "No" para CADA tipo de cobertura en las respuestas a-h.* *NO incluya los planes que cubren solamente un tipo de servicios, tales como planes dentales, de medicamentos o de la vista.* a. Seguro a través de su empleador o sindicato (*union*), actual o previo, (de esta persona o de cualquier otro miembro de la familia) b. Medicare, para personas que tienen 65 años o más, o personas con ciertos impedimentos c. Medicaid, Medical Assistance o cualquier otro tipo de plan de asistencia estatal o gubernamental para personas con un ingreso bajo d. Seguro adquirido directamente de una compañía de seguro o a través del Mercado de seguros estatal o federal, CuidadoDeSalud.gov o un sitio web estatal similar (por esta persona o por cualquier otro miembro de la familia) e. TRICARE o cualquier otro seguro de salud militar f. Administración de Veteranos (VA) (incluye a esas personas que alguna vez hayan usado o se hayan registrado en el sistema de cuidado médico de la VA) g. Servicio de Salud Indio (Indian Health Service) h. Cualquier otro tipo de seguro de salud NO mencionado anteriormente – *Nombre del plan* ~~Especifique~~ _____ ---	Skip all but those who answer "yes" to item D past the premiums and subsidy questions. ■ It appears the premium and subsidy questions are most relevant for those who are covered under the ACA. Skipping all others around these questions reduces both respondent burden and the risk of false positives from respondents to whom the questions don't really apply. ■ Given that Medicaid recipients are by definition receiving subsidized health care, skipping such respondents around the premium and subsidy questions further reduces the risk of response error. ■ Ideally the questions would be asked only of those covered under the ACA. However, it would be too complicated to separate out those who purchase insurance directly (but not through the ACA) in a skip instruction. Retain all other aspects of the Round 2 versions of the health insurance, premiums and subsidies questions. ■ Round 2 findings did not strongly suggest updates to any other revisions from Round 1.

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Does this person or another family member pay a premium for this health insurance plan? *A premium is a fixed amount of money paid on a regular basis for health coverage. It does not include copays, deductibles, or other expenses such as prescription costs.* Yes No **Based on family income, does this person or another family member receive financial assistance through a subsidy or tax credit to help pay part or all of the cost of the premium for this plan?** Yes No	==**Conteste las preguntas 16a y 16b si marcó "Sí" en la pregunta 15d. De lo contrario, PASE a la pregunta 17**== **¿Paga esta persona u otro miembro de la familia una prima o cuota por este seguro de salud?** *Una prima o cuota es una cantidad fija de dinero que se paga regularmente para la cobertura de salud. No incluye los copagos, deducibles ni otros gastos, tales como los costos de las medicinas recetadas.* Sí No **¿Basado en el ingreso de la familia, ¿recibe esta persona u otro miembro de la familia asistencia financiera a través de un subsidio o crédito de impuestos para ayudar a pagar parte o todo del costo de la prima o cuota para este plan?** Sí No	

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
I am now going to ask you some questions about (your/<Name>'s) health insurance and health coverage. Do NOT include plans that cover only one type of service, such as dental, drug or vision plans. **a. (Are you/Is <Name>) currently covered by health insurance through an employer or union? Include coverage from current or former employers or unions of (yours/his/hers) or another family member.** Yes No **b. (Are you/Is <Name>) currently covered by Medicare, for people age 65 or older or people with certain disabilities?** Yes No **c. (Are you/Is <Name>) currently covered by Medicaid, Medical Assistance, or any kind of state or government-assistance plan for those with low incomes?** Yes No **d.(Are you/Is <Name>) currently covered by health insurance purchased directly from an insurance company or through a State or Federal Marketplace, Health care.gov, or a similar state website by <you/him/her> or another family member?** Yes No	**Ahora le voy a hacer preguntas acerca de (su seguro y cobertura de salud/el seguro y cobertura de salud de <Name>). NO incluya los planes que cubren solamente un tipo de servicios, tales como planes dentales, de medicamentos o de la vista.** **a. ¿Tiene (usted/<Name>) cobertura actualmente de un plan de seguro de salud a través de un empleador o sindicato (*union*) actual o previo? Incluya cobertura de empleadores o sindicatos (*unions*) actuales o previos (suyos/de él/de ella) o de algún otro miembro de la familia.** Sí No **b. ¿Tiene [usted/< Name>] cobertura actualmente de Medicare, para personas que tienen 65 años o más, o personas con ciertas discapacidades?** Sí No **c. ¿Tiene [usted/< Name>] cobertura actualmente de Medicaid, Medical Assistance o cualquier otro tipo de plan de asistencia estatal o gubernamental para personas con un ingreso bajo?** Sí No **d. ¿Tiene [usted/< Name>] cobertura actualmente de un plan de seguro de salud comprado por <usted/él/ella> u otro miembro de la familia directamente a una compañía de seguros o a través del Mercado de seguros estatal o federal, CuidadoDeSalud.gov, o un sitio web estatal similar?** Sí No	Same recommendations as Paper mode, along with the following additional recommendations. Add an edit check to those who report both Medicaid and insurance purchased directly. - In both Rounds 1 and 2, we observed Medicaid respondents who double-counted their insurance type because they had signed up for Medicaid through a state or Federal marketplace website. Match the wording of item H more closely to that of the other category on Paper. For consistency with CAI, reword the "specify" instruction on Paper to say "name of plan." - Although we observed fewer respondents double-counting in Round 2 than in Round 1, we notice a slight trend in Round 2 for respondents to incorrectly report an insurance type in item H that should have been reported in a previous category. While we don't expect respondents to notice or fully understand the distinction between "types" of plans and actual number of plans they have, adding words that remind them not to include insurance types that have already been listed may help reduce such errors.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
e. (Are you/Is <Name>) currently covered by TRICARE or other military health care? Yes No **f. (Are you/Is <Name>] currently covered through the VA or [have you/has <Name>] ever used or enrolled for VA health care?** Yes No **g. (Are you/Is <Name>) currently covered through the Indian Health Service?** Yes No **h. (Are you/Is <Name>) currently covered by any other ==type of== health insurance or health coverage plan ==NOT already mentioned==?** Yes No **What is the name of the health care plan?** **[AFTER PARTS B-H, IF YES TO PART A AND ANY OTHER PLAN]** **I recorded that (you/<NAME>) (have/has) insurance through an employer or union AND (READ PLAN). These are two different plans, is that correct?** Yes (SKIP to Premiums or Daily Activities, as applicable) No **Which of these best describes (your/<NAME>'s) plan?**	**e. ¿Tiene [usted/< Name>] cobertura actualmente de TRICARE o cualquier otro seguro de salud militar?** Sí No **f. ¿Tiene [usted/< Name>] cobertura actualmente a través de la Administración de Veteranos (VA) o ha usado o se ha registrado [usted/<él/ella>] alguna vez para cuidado de la salud en la Administración de Veteranos (VA)?** Sí No **g. ¿Tiene [usted/< Name>] cobertura actualmente a través del Servicio de Salud Indio (Indian Health Service)?** **h. ¿Tiene [usted/< Name>] cobertura actualmente por cualquier otro tipo de seguro de salud o plan de cobertura de seguro de salud ==que NO se haya mencionado==??** Sí No **¿Cuál es el nombre del plan de seguro de salud?** **[AFTER PARTS B-H, IF YES TO PART A AND ANY OTHER PLAN]** **He anotado que (usted/<NAME>) tiene seguro de salud a través de un empleador o sindicato (*union*) Y (READ PLAN). Estos son dos planes diferentes, ¿es esto correcto?** **Sí** (SKIP to Premiums or Daily Activities, as applicable) **No**	

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
[AFTER PARTS C-D, IF YES TO BOTH C AND D] **I recorded that (you/<NAME>) (have/has) insurance through Medicaid, Medical Assistance, or a state or government-assistance plan AND health insurance purchased directly from an insurance company or through a State or Federal Marketplace. These are two different plans, is that correct?** Yes (SKIP to TRICARE question) No **Which of these best describes (your/<NAME>'s) plan?** Person 2+: **I am now going to ask you some questions about (your/<Person 2+ Name>'s) health insurance and health coverage. Do NOT include plans that cover only one type of service, such as dental, drug or vision plans.** **(Are you/Is <Name>) currently covered by health insurance through an employer or union? Include coverage from current or former employers or unions of (yours/his/hers) or another family member.** Yes No Same type as Person 1 [IF SAME TYPE AS PERSON 1] **Earlier I recorded that < Person 1 Name is/you are> currently covered by <read full type of first insurance marked for PERSON 1>. (Do you/Does <Person 2+ Name>) have this same**	**¿Cuál de las siguientes mejor describe el plan (suyo /de [NAME])?** **[AFTER PARTS C-D, IF YES TO BOTH C AND D]** **He anotado que (usted/<NAME>) tiene seguro de Medicaid, Medical Assistance o un plan de asistencia estatal o gubernamental Y un plan de seguro de salud comprado por <usted/él/ella> u otro miembro de la familia directamente a una compañía de seguros o a través del Mercado de seguros estatal o federal. Estos son dos planes diferentes, ¿es esto correcto?** **Sí** (SKIP to TRICARE question) **No** **¿Cuál de las siguientes mejor describe el plan (suyo /de [NAME])?** Persona 2+: **Ahora le voy a hacer preguntas acerca de (su seguro y cobertura de salud/el seguro y cobertura de salud de <Person 2+ Name>. NO incluya los planes que cubren solamente un tipo de servicios, tales como planes dentales, de medicamentos o de la vista.** **¿Tiene (usted/<Name>) cobertura actualmente de un plan de seguro de salud a través de un empleador o sindicato (*union*) actual o previo? Incluya cobertura de empleadores o sindicatos (*unions*) actuales o previos (suyos/de él/de ella) o de algún otro miembro de la familia.** Sí No Mismo tipo que la Persona 1	

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
type of health insurance or health coverage? Yes No I also recorded that (< Person 1 Name> is/you are) currently covered by <read full type of second insurance marked for PERSON 1>. (Do you/Does <Person 2+ Name>) have this same type of health insurance or health coverage? (Are you/Is <Person2+ Name>) covered by any other health insurance plan? Do NOT include plans that cover only one type of service, such as dental, drug or vision plans. -- **If "Yes" in question 15d, Continue. Otherwise, SKIP to question 17** <Do you/Does (Name)> or another family member pay a premium for this health insurance plan? A premium is a fixed amount of money paid on a regular basis for health coverage. It does not include copays, deductibles, or other expenses such as prescription costs. Yes No Based on family income, <do you/does (Name)> or another family member receive financial assistance through a subsidy or tax credit to help pay part or all of the cost of the premium for this plan? Yes No	**[SI MISMO TIPO QUE LA PERSONA 1]** **He anotado antes que (<Person 1>/usted) tiene actualmente cobertura de <read full type of insurance marked for PERSON 1> como <PERSON 1>. ¿Tiene (usted/<Person 2+ Name>) el mismo tipo de seguro de salud o cobertura de salud?** Sí No **He anotado también que (<Person 1 Name> /usted) tiene actualmente cobertura de <read full type of insurance marked for PERSON 1>. ¿Tiene (usted/<Person 2+ Name>) el mismo tipo de seguro de salud o cobertura de salud?** Sí No **¿Tiene (usted/<Person 2+ Name>) cobertura de cualquier otro plan de seguro de salud? NO incluya los planes que cubren solamente un tipo de servicios, tales como planes dentales, de medicamentos o de la vista.** Sí No --- **If "Yes" in question 15d, Continue. Otherwise, SKIP to question 17** **¿Paga <usted/(Name)> u otro miembro de la familia una prima o cuota por este seguro de salud? Una prima o cuota es una cantidad fija de dinero que se paga con regularidad para tener cobertura de salud. No incluye los copagos, deducibles ni otros**	

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
	gastos, tales como los costos de las medicinas recetadas. Sí No **Basado en el ingreso de la familia, ¿recibe \<usted/(Name)\> u otro miembro de la familia asistencia financiera a través de un crédito de subsidio o impuestos para ayudar a pagar parte o todo el costo de la prima o cuota para este plan?** Sí No	

3.5   Cohabitation and Domestic Partnership

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What is this person's current marital status? Now married ➔ *SKIP next two questions* Widowed Divorced Separated Never married --- **Is this person currently living with a boyfriend/girlfriend or partner in this household?** Yes No --- **Is this person currently in a registered domestic partnership or civil union?** Yes No	**¿Cuál es el estado civil actual de esta persona?** Casado(a) actualmente ➔ *PASE dos preguntas* Viudo(a) Divorciado(a) Separado(a) Nunca se ha casado --- **¿Vive esta persona actualmente con su novio/novia o pareja en este hogar?** Sí No --- **¿Tiene esta persona actualmente una pareja por una unión legal reconocida por el gobierno estatal o local?** Sí No	Retain current wording. ■ With so few respondents to this series of questions, we do not have any recommendations for revision. We did not detect any significant problems among the three cohabiting respondents. Further testing on a larger scale is needed to confirm that data from these questions will be valid and reliable.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
I will now be asking about <your/(Name)'s> marital status. **<Is (Name)/Are you> currently married, widowed, divorced, separated, or never married?** Now married ➔ *SKIP next two questions* Widowed Divorced Separated Never married -- **<Is (Name)/Are you> currently living with a boyfriend, girlfriend, or partner in this household?** Yes No -- **<Is (Name)/Are you> currently in a registered domestic partnership or civil union?** Yes No	**Ahora, le voy a preguntar acerca <de su estado civil/del estado civil de (Name)>.** **¿Está <(Name)/usted> actualmente casado(a), viudo(a), divorciado(a), separado(a) o nunca se ha casado?** Casado(a) actualmente ➔ *PASE dos preguntas siguientes* Viudo(a) Divorciado(a) Separado(a) Nunca se ha casado -- **¿Vive <(Name)/usted> actualmente con su novio, novia, o pareja en este hogar?** Sí No -- **¿Tiene <(Name)/usted> actualmente una pareja por una unión legal reconocida por el gobierno estatal o local?** Sí No	Same recommendation as Paper mode.

3.6 Journey to Work: Commuting Mode

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
How did this person usually get to work LAST WEEK? ~~*If this person usually used more than one method of transportation during the trip, mark (X) the box of the one*~~ *Mark (X) ONE box for the method of transportation used for most of the distance.* __ Car, truck, or van __ Bus __ Subway or elevated rail __ ~~Commuter rail or~~ Long-distance train or commuter rail __ Light rail, streetcar, or trolley __ Ferryboat __ Taxicab __ Motorcycle __ Bicycle __ Walked __ Worked from home➔ *SKIP to 39a* __ Other method	**¿Cómo llegó usualmente esta persona al trabajo LA SEMANA PASADA?** *Marque (X) en UNA casilla para el medio de transporte que utilizó por más distancia.* ~~*Si esta persona usualmente utilizó más de un medio de transporte durante el viaje, marque (X) la casilla correspondiente al que utilizó por más distancia.*~~ __ Automóvil, camion o *van* __ Autobús __ Tren subterráneo o elevado __ ~~Tren para áreas cercanas,~~ Tren para largas distancias o tren para áreas cercanas __ Tren ligero o tranvía __ Lancha (ferry) __ Taxi __ Motocicleta __ Bicicleta __ Caminó __ Trabajó desde el hogar ➔ *PASE a la pregunta 39a* __ Otro método	Reverse the order of the commuter/long-distance rail category. ■ There was a trend among Round 2 respondents to revert to the "commuter rail" category when they were unsure how to categorize the type of rail transit they or their household members take. Reversing the order in which the rail types in this category appear may help alleviate the issue. Simplify the instructions to mark only one response category, or allow respondents to mark more than one. ■ Eight of 35 respondents marked more than one category for their response. Simplifying them can better ensure respondents notice and correctly follow the instructions to mark only one answer. ■ Consider allowing respondents to select more than one response.

CATI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
LAST WEEK, how did <(Name)/you> USUALLY get to work? (If <he/she/(Name)/you> usually used more than one method of transportation during the trip, report the one used for most of the distance.) Car, truck, or van Bus Subway or elevated rail ~~Commuter rail or~~ Long-distance train or commuter rail Light rail, streetcar, or trolley Ferryboat Taxicab Motorcycle Bicycle Walked Worked from home ➔ *SKIP to 39a* Other method	**¿Cómo llegó <(Name)/usted> usualmente al trabajo LA SEMANA PASADA?** (Si <él/ella/(Name)/usted> usualmente utilizó más de un medio de transporte durante el viaje, diga cuál fue el que utilizó por más distancia.) Automóvil, camión, o *van* Autobús Tren subterráneo o elevado ~~Tren para áreas cercanas, t~~Tren para largas distancias o tren para áreas cercanas Tren ligero o tranvía Lancha (ferry) Taxi Motocicleta Bicicleta Caminó Trabajó desde el hogar ➔*PASE a la pregunta 39a* Otro método	Same recommendations as Paper mode, unless not applicable to CATI.

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
<Using Card G,> LAST WEEK, how did <(Name)/you> USUALLY get to work? (If <he/she/(Name)/you> usually used more than one method of transportation during the trip, report the one used for most of the distance.) Car, truck, or van Bus Subway or elevated rail <s>Commuter rail or</s> Long-distance train or commuter rail Light rail, streetcar, or trolley Ferryboat Taxicab Motorcycle Bicycle Walked Worked from home ➔ *SKIP to 39a* Other method	**<Usando la Tarjeta G> ¿cómo llegó<(Name)/usted> usualmente al trabajo LA SEMANA PASADA**? (Si <él/ella/(Name)/usted> usualmente utilizó más de un medio de transporte durante el viaje, diga cuál fue el que utilizó por más distancia.) Automóvil, camión, o *van* Autobús Tren subterráneo o elevado <s>Tren para áreas cercanas, t</s>Tren para largas distancias o tren para áreas cercanas Tren ligero o tranvía Lancha (ferry) Taxi Motocicleta Bicicleta Caminó Trabajó desde el hogar ➔*PASE a la pregunta 39a* Otro método	Same recommendations as Paper mode, unless not applicable to CAPI.

3.7 Journey to Work: Time Left for Work

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
LAST WEEK, what time did this person's trip to work usually begin? Hour Minute a.m. p.m.	**LA SEMANA PASADA, ¿a qué hora usualmente comenzó esta persona su viaje al trabajo?** Hora Minutos a.m. p.m.	We recommend proceeding with this question as worded for the field test. ■ While respondents used some rounding and estimation strategies to answer the question, most understood what the question was asking and did not report difficulties in coming up with their answer. ■ None of the respondents who understood what the question was asking felt it was intrusive. ■ Respondents appeared to answer the time left for work question more accurately for other household members than did Round 1 respondents answering the time arrived at work question for other household members.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
LAST WEEK, what time did <your/(Name)'s> trip to work usually begin? **(What hour)?** **(How many minutes past that hour?)** **(Was that AM or PM)?**	**LA SEMANA PASADA, ¿a qué hora usualmente comenzó <(Name)/usted> su viaje al trabajo?** **(¿Cuántos minutos pasado esa hora?)** **(¿Durante la mañana o por la tarde (AM o PM)?)**	Same recommendation as Paper mode.

3.8 Number of Weeks Worked

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
~~During the PAST 12 MONTHS (52 weeks), did this person work 50 or more weeks?~~ Over the past 52 weeks, since one year ago today, did this person work EVERY week, even for a few hours? Count paid vacation, paid sick leave, and military service as work. • Yes SKIP TO QUESTION 39 • No ~~How many WEEKS did this person work, even for a few hours, including paid time off?~~ Over the past 52 weeks, since one year ago today, how many WEEKS did this person work? Include paid time off and include weeks when the person only worked for a few hours. weeks _____	Durante las últimas 52 semanas, es decir desde hoy hace un año, ¿trabajó esta persona TODAS las semanas, incluso si solo fueron por unas pocas horas? ~~Durante los ÚLTIMOS 12 MESES (52 semanas), ¿trabajó esta persona 50 semanas o más?~~ Incluya vacaciones pagadas, licencia por enfermedad pagada, y servicio militar como trabajo. • Sí → PASE a la pregunta 39 • No Durante las últimas 52 semanas, es decir desde hoy hace un año, ¿cuántas SEMANAS trabajó esta persona? Incluya vacaciones o licencias pagadas e incluya semanas en que la persona únicamente trabajó por unas pocas horas. ~~¿Cuántas SEMANAS trabajó esta persona, aunque haya sido por algunas horas, incluso tiempo libre pagado?~~ semanas _____	Clarify reference period by saying "Over the past 52 weeks, since one year ago today…" ■ Similar to Round 1, in Round 2 there was a high degree of error and inaccuracy in reporting the number of weeks worked. There continues to be a problem of misunderstanding the desired timeframe for the question, with fully 19 out of 37 respondents misinterpreting the reference period as something other than the last 12 months, and 8 saying it would have changed their answer if they had used the correct timeframe. Modify question 38a to ask if the person worked EVERY week rather than 50 or more weeks and skip those who answer "yes" past 38b. ■ Seven out of the 16 respondents who said they had worked 50 or more weeks in the past 12 months had not actually worked the full year. This gate question is essentially asking if the person worked a full year, so the recommended approach removes the need to calculate weeks and instead asks if the person worked every week over the past 52 weeks. To reduce reporting errors, repeat reference period in question 38b. ■ Again noting that 19 out of 37 respondents misinterpreted the desired reporting period for the question, we recommend repeating the wording of "Over the past 52 weeks, since 1 year ago today" when asking for the number of weeks worked.

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
		In 38b, move information about including weeks where even a few hours are worked from the question to the instruction.
		■ The addition of the reference period to 38b makes the question quite lengthy. Because we have added the instruction to include weeks worked "even for a few hours to the question wording in 38a, it seems safe to move that same information from the question wording to the instruction in 38b. Furthermore, including the reference period and the types of weeks to count (those in which only a few hours are worked; those for which the person took paid time off) in both questions may increase the chances that respondents pay attention to them, thus improving accuracy of reporting.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
~~During the PAST 12 MONTHS or 52 weeks, did <(Name)/you> work 50 or more weeks?~~ Over the past 52 weeks, since one year ago today, did <(Name)/you> work EVERY week, even for a few hours? Count paid vacation, paid sick leave, and military service as work. • Yes SKIP TO QUESTION 39 • No ~~How many WEEKS did <(Name)/you> work, even for a few hours, including paid time off?~~ Over the past 52 weeks, since one year ago today, how many WEEKS did <(Name)/you> work? Include paid time off and include weeks when the person only worked for a few hours. weeks _____	Durante las últimas 52 semanas, es decir desde hoy hace un año, ¿trabajó <(Name)/usted> TODAS las semanas, incluso si solo fueron por unas pocas horas? ~~Durante los ÚLTIMOS 12 MESES o 52 semanas, ¿trabajó <(Name)/usted> 50 semanas o más?~~ Incluya vacaciones pagadas, licencia por enfermedad pagada, y servicio militar como trabajo. • Sí SKIP TO QUESTION 39 • No Durante las últimas 52 semanas, es decir desde hoy hace un año, ¿cuántas SEMANAS trabajó <(Name)/usted>? Incluya vacaciones o licencias pagadas e incluya semanas en que la persona únicamente trabajó por unas pocas horas. semanas _____	Same recommendations as Paper mode.

3.9 Class of Worker

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
DESCRIPTION OF EMPLOYMENT. *The next series of questions is about the type of employment this person had last week.* *If this person had more than one job, describe the one at which the most hours were worked. If this person did not work last week, describe the most recent employment in the past five years.* **Which one of the following best describes this person's employment last week or the most recent employment in the past 5 years?** *Mark (X) ONE box.* **PRIVATE SECTOR EMPLOYEE** o **For-profit** company or organization o **Non-profit** organization (including tax-exempt and charitable organizations) **GOVERNMENT EMPLOYEE** o **Local government** (for example: city or county school district) o **State government** (including state colleges/universities) o **Active duty** U.S. Armed Forces or Commissioned Corps o **Federal government** civilian employee **SELF-EMPLOYED or OTHER:** o **Owner of non-incorporated** business, professional practice, or farm o **Owner of incorporated** business, professional practice, or farm o Worked **without pay** in a **for-profit** family business or farm for 15 hours or more per week --	**DESCRIPCIÓN DEL EMPLEO.** *La serie de preguntas que sigue es sobre el tipo de empleo que esta persona tenía la semana pasada.* *Si esta persona tenía más de un empleo, describa el empleo en el cual trabajó más horas. Si esta persona no trabajó la semana pasada, describa el empleo más reciente en los últimos cinco años.* **¿Cuál de las siguientes opciones describe mejor el empleo de esta persona la semana pasada o el empleo más reciente en los últimos 5 años?** *Marque (X) UNA casilla.* **EMPLEADO DEL SECTOR PRIVADO:** o Compañía u organización **con fines de lucro** o Organización **sin fines de lucro** (incluidas las organizaciones exentas de impuestos y las organizaciones caritativas) **EMPLEADO DEL GOBIERNO:** o **Gobierno local** (por ejemplo: distrito escolar de la ciudad o condado) o **Gobierno estatal** (incluyendo universidades estatales) o **Servicio activo** en las Fuerzas Armadas de los EE. UU. o en el Cuerpo de Comisionados o Empleado civil del **gobierno federal** **EMPLEADO POR CUENTA PROPIA u OTRO:** o Negocio, práctica profesional o finca **propia no incorporada** o Negocio, práctica profesional o finca **propia incorporada** o Trabajó **sin pago** en un negocio o finca de la familia **con fines de lucro** 15 horas o más a la semana --	Retain the Round 2 wording for the Content Test. ■ The revised classification of work item tested well, overall, in all three modes and both languages. Most respondents appeared to interpret the questions as intended and there was no underlying pattern among the nine respondents who did not answer accurately.

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What was the name of this person's employer, business, agency, or branch of the Armed Forces? _____	**¿Cuál era el nombre del empleador, negocio, agencia o rama de las Fuerzas Armadas de esta persona? _____**	

CATI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
The next series of questions is about the type of employment <(Name)/you> had last week. **If <(Name)/you> had more than 1 job, describe the one at which the most hours were worked. If <(Name)/you> did not work last week, describe the most recent employment in the past five years.** **I am going to read 5 categories. Please pick the one that best describes <(Name)'s/your> employment – a private organization or company, government, active duty U.S. Armed Forces or Commissioned Corps, self-employed, or worked without pay in a for-profit family business or farm.** Private company or organization Government Active duty U.S. Armed Forces or Commissioned Corps Self-employed Worked without pay in a for-profit family business or farm **Did <(Name)/you> work for a for-profit company or non-profit organization ?** For-profit company Non-profit organization	**La serie de preguntas que sigue es sobre el tipo de empleo que <(Name)/usted> tenía la semana pasada.** **Si <(Name)/usted> tenía más de 1 empleo, describa el empleo en el que trabajó más horas. Si <(Name)/usted> no trabajó la semana pasada, describa su empleo más reciente en los últimos cinco años.** **Voy a leer 5 categorías. Por favor, escoja la que mejor describe <su empleo/el empleo de (Name)> - una organización o compañía privada, el gobierno, servicio activo en las Fuerzas Armadas de los EE. UU. o en el Cuerpo de Comisionados, empleado por cuenta propia, o trabajó sin pago en un negocio o finca de la familia con fines de lucro.** Compañía u organización privada Gobierno Servicio activo en las Fuerzas Armadas de los EE. UU. o en el Cuerpo de Comisionados Empleado por cuenta propia Trabajó sin pago en un negocio o finca de la familia con fines de lucro **¿Trabajó <(Name)/usted> para una compañía con fines de lucro o una organización sin fines de lucro?** Compañía con fines de lucro Organización sin fines de lucro	Retain the Round 2 wording for the Content Test.

CATI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Did <(Name)/you> work for a local, state, or federal government? Local State Federal	**¿Trabajó <(Name)/usted> para un gobierno local, estatal o federal?** Local Estatal Federal	
Was <(Name)'s/your> self-employed business, professional practice, or farm incorporated or not incorporated? Incorporated Not incorporated	**¿Era el negocio por cuenta propia, práctica profesional, o finca de <(Name)/usted> incorporado o no incorporado?** Incorporado No incorporado	
Did <(Name)/you> work without pay in this for-profit family business or farm for 15 hours or more per week? Yes No	**¿Trabajó <(Name)/usted> sin pagopara este negocio o finca de la familia con fines de lucro 15 horas o más a la semana?** Sí No	
---	--	
What was the name of <(Name)'s/your> employer, business, or agency?	**¿Cuál era el nombre del empleador, negocio o agencia de (Name)?/¿Cuál era el nombre de su empleador, negocio o agencia?**	
Which branch of the Armed Forces or Commissioned Corps did <(Name)/you> work for? U.S. Army U.S. Navy U.S. Air Force U.S. Marine Corps U.S. Coast Guard U.S. Public Health Service National Oceanic and Atmospheric Administration (NOAA)	**Para qué rama de las Fuerzas Armadas o del Cuerpo de Comisionados trabajó <(Name)/usted>?** Ejército de los EE. UU. Marina de los EE. UU. Fuerza Aérea de los EE. UU. Infantería de Marina de los EE. UU. Servicio de Guardacostas de los EE.UU. Servicios de Salud Pública de los EE. UU. Administración Nacional Oceánica y Atmosférica (NOAA)	

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
The next series of questions is about the type of employment <(Name)/you> had last week. **If <(Name)/you> had more than 1 job, describe the one at which the most hours were worked. If <(Name)/you> did not work last week, describe the most recent employment in the past five years.** **Let's start with the first question. Using CARD H, which one of the following best describes <(Name)'s/your> employment?** **(Card H shows what is listed below)** **PRIVATE SECTOR EMPLOYEE** **For-profit** company or organization **Non-profit** organization (including tax-exempt and charitable organizations) **GOVERNMENT EMPLOYEE** **Local government** (for example: city or county school district) **State government** (including state colleges/ universities) **Active duty** U.S. Armed Forces or Commissioned Corps **Federal Government** civilian employee **SELF-EMPLOYED OR OTHER** **Owner of non-incorporated** business, professional practice, or farm **Owner of incorporated** business, professional practice, or farm Worked **without pay** in a **for-profit** family business or farm for 15 hours or more per week ---	**La serie de preguntas que sigue es sobre el tipo de empleo que <usted/Nombre> tenía la semana pasada.** **Si <usted/Nombre> tenía más de un empleo, describa el empleo en el cual trabajó más horas. Si <usted/Nombre> no trabajó la semana pasada, describa el empleo más reciente en los últimos cinco años.** **Empezamos con la primera pregunta. Usando la TARJETA H, ¿cuál de las siguientes opciones describe mejor <su empleo/ el empleo de (Name)>?** **(Card H shows what is listed below)** **EMPLEADO DEL SECTOR PRIVADO:** Compañia u organización **con fines de lucro** Organización **sin fines de lucro** (incluidas las organizaciones exentas de impuestos y las organizaciones caritativas) **EMPLEADOR DEL GOBIERNO:** **Gobierno local** (por ejemplo: distrito escolar de la ciudad o condado) **Gobierno estatal** (incluyendo universidades estatales) **Servicio activo** en las Fuerzas Armadas de los EE. UU. o en el Cuerpo de Comisionados Empleado civil del **gobierno federal** **EMPLEADO POR CUENTA PROPIA U OTRO:** **Propietario(a)** de un negocio, una práctica profesional o una finca **no incorporada** **Propietario(a)** de un negocio, una práctica profesional o una finca **incorporada** Trabajó **sin pago** en un negocio o finca de la familia **con fines lucro** 15 horas o más a la semana-------------------- --- **¿Cuál era el nombre del empleador, negocio o agencia**	Retain the Round 2 wording for the Content Test.

CAPI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What was the name of <(Name)'s/your> employer, business, or agency? **Which branch of the Armed Forces or Commissioned Corps did <(Name)/you> work for?** U.S. Army U.S. Navy U.S. Air Force U.S. Marine Corps U.S. Coast Guard U.S. Public Health Service National Oceanic and Atmospheric Administration (NOAA)	**de (Name)?/¿Cuál era el nombre de su empleador, negocio o agencia?** **Para qué rama de las Fuerzas Armadas o del Cuerpo de Comisionados trabajó <(Name)/usted>?** Ejército de los EE. UU. Marina de los EE. UU. Fuerza Aérea de los EE. UU. Infantería de Marina de los EE. UU. Servicio de Guardacostas de los EE.UU. Servicios de Salud Pública de los EE. UU. Administración Nacional Oceánica y Atmosférica (NOAA)	

3.10   Industry and Occupation

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What kind of business or industry was this? *Include the main activity, product, or service provided at the location where employed. (For example: elementary school, residential construction, or something else)* _____ -- **Was this mainly –** *Mark (X) ONE box.* manufacturing? wholesale trade? retail trade? other (agriculture, construction, service, government, etc.)? -- **What was this person's main occupation?** *(For example: 4th grade teacher, entry-level plumber, or something else)* _____ -- **Describe this person's most important activities or duties.** *(For example: instruct and evaluate students and create lesson plans, assemble and install pipe sections and review building plans for work details, or something else)* _____	**¿Qué tipo de negocio o industria era este?** *Incluya la actividad, producto o servicio principal que se ofrecía en el lugar de empleo. (Por ejemplo: escuela primaria, construcción residencial, etc.)* _____ -- **¿Era este principalmente de –** *Marque (X) UNA casilla.* manufactura? comercio al por mayor? comercio al por menor? otro (agricultura, construcción, servicio, gobierno, etc.)? -- **¿Cuál era la ocupación principal de esta persona?** *(Por ejemplo: maestro(a) de 4to grado, plomero(a) principiante, etc.)* _____ -- **Describa las actividades o deberes más importantes de esta persona.** (Por ejemplo: dar clases y evaluar a los estudiantes y planificar lecciones, montar e instalar tramos de tubería y revisar los planes de construcción para los detalles del trabajo, etc.) _____	Add a "closing" phrase ("or something else"/"etc.") to enhance verbal administration of the examples lists and to emphasize that the lists are not exhaustive. ■ To enhance verbal administration of the examples lists and to emphasize that the lists are not exhaustive, we recommend adding in a "closing" phrase. For consistency across items, we recommend adding the new phrase to all the industry and occupation items, even though difficulty with the examples only appeared in the kind of industry and most important activities questions. The phrase "or something else" will help the respondents understand that non-listed responses are welcome. In Spanish, the phrase "etc." is the best translation for extending the list of examples.

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
What kind of business or industry was this? **Include the main activity, product, or service provided at the location where employed. For example: elementary school, residential construction, or something else.** _____ -- **Was this mainly – manufacturing, wholesale trade, retail trade, or some other kind of business?** Manufacturing Wholesale trade Retail trade Other (agriculture, construction, service, government, etc.) -- **What was <(Name)'s/your> main occupation?** **For example: 4th grade teacher, entry-level plumber, or something else** _____ -- **Describe <(Name)'s/your> most important activities or duties. For example: instruct and evaluate students and create lesson plans, assemble and install pipe sections and review building plans for work details, or something else.**_____	**¿Qué tipo de negocio o industria era ésta?** **Incluya la actividad, producto o servicio principal que se ofrecía en el lugar de empleo. Por ejemplo: escuela primaria, construcción residencial, etc.** _____ -- **¿Era este principalmente de – manufactura, comercio al por mayor, comercio al por menor o algún otro tipo de negocio?** Manufactura Comercio al por mayor Comercio al por menor Otro (agricultura, construcción, servicio, gobierno, etc.) -- **¿Cuál era la ocupación principal de (Name)?/** **¿Cuál era su ocupación principal?** **Por ejemplo: maestro(a) de 4to grado, plomero(a) principiante, etc.** _____ -- **Describa las actividades o deberes más importantes de <(Name)/usted>. Por ejemplo: dar clases y evaluar a los estudiantes y planificar lecciones, montar e instalar tramos de tubería y revisar los planes de construcción para los detalles del trabajo, etc.**. _____	Same recommendations as Paper mode

3.11   Retirement Income

PAPER VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Retirement income, pensions, survivor or disability income. *Include income from a previous employer or union, or any regular withdrawals or distributions from IRA, Roth IRA, 401(k), 403(b), or other accounts specifically designed for retirement.* Do not include Social Security. Yes No **TOTAL AMOUNT for past 12 months_____**	**Ingreso de jubilación, pensiones, ingreso de sobreviviente o discapacidad.** *Incluye ingreso de un empleador o sindicato (*union*) previo, o alguna cantidad retirada o distribuida regularmente de una cuenta IRA, Roth IRA, 401(k), 403(b) u otras cuentas diseñadas específicamente para la jubilación.* NO incluya Seguro Social. Sí No **CANTIDAD TOTAL en los últimos 12 meses_____**	Retain the current item wording in both English and Spanish. ■ Most respondents were able to answer easily and accurately about their retirement income and appeared to be interpreting the instructions and examples correctly. ■ Spanish respondents' preferences for the terms probed on did not provide strong enough evidence to revise the Spanish wording.

CAI VERSION

ROUND 2 ENGLISH (WITH FINAL CHANGES HIGHLIGHTED)	ROUND 2 SPANISH (WITH FINAL CHANGES HIGHLIGHTED)	FINAL RECOMMENDATION AND JUSTIFICATION
Did <(Name)/you> receive any survivor or disability income DURING THE PAST 12 MONTHS? Yes No **What was the amount?** (Do not include Social Security) **Did <(Name)/you> receive a pension or any retirement income from a previous employer or union, or any regular withdrawals or distributions from retirement accounts such as a 401(k), 403(b), IRA, Roth IRA, or other accounts designed specifically for retirement DURING THE PAST 12 MONTHS?** **What was the amount?** (Do not include Social Security) _____	**¿Recibió <(Name)/usted> algún ingreso por sobreviviente o discapacidad DURANTE LOS ÚLTIMOS 12 MESES?** Sí No **¿Cuál fue la cantidad?** (No incluya Seguro Social) **¿Recibió <(Name)/usted> una pensión o algún ingreso de jubilación de un empleador o sindicato (*union*) previo, o alguna cantidad retirada o distribuida regularmente de cuentas de jubilación tales como 401(k), 403(b), IRA o de otras cuentas diseñadas específicamente para la jubilación DURANTE LOS ÚLTIMOS 12 MESES?** **¿Cuál fue la cantidad?** (No incluya Seguro Social) _____	Same recommendations as Paper mode

The Group 1 protocols tested potential revisions to the Hispanic origin and race items, as well as household level items regarding telephone, computer and Internet use.

4.1   Hispanic Origin/Race Questions

4.1.1   Background

While racial classification by the U.S. Census Bureau has a long history (e.g., Gauthier, 2000), results from recent censuses, surveys, and research tests reveal that asking Americans to respond to such questions poses problems with comprehension and measurement. (e.g., Terry and Fond, 2013; Dusch and Meier, 2012; Smirnova and Scanlon, 2013). This is likely because of the conceptual complexity of distinguishing between "race" and "Hispanic origin" in the 1997 Office of Management and Budget (OMB) standards. People's general lack of understanding or acceptance of these standards is compounded by rapidly changing demographics of the U.S. population, the increase in immigration flows, and the fluidity of racial and ethnic self-identification. In response to these changes, a growing number of Americans use the "Some Other Race" category on Census Bureau surveys to reflect their multiracial and multi-ethnic backgrounds.

Based on these issues and the results of numerous studies examining how to ask these questions, Round 1 tested a two-item version and a one-item version for asking about Hispanic origin and race. The findings showed a strong preference for a one-item version, a positive reaction to the addition of a category for Middle Eastern/North African, and that respondents' interpretations of "race" and "origin" varied widely.

Round 2 sought to further test the performance of a single-item question, using modified wording that eliminated any reference to race, ethnicity, or origin in the question text, instead asking respondents what "category" they consider themselves to be. As in Round 1, respondents were asked to provide details about their category to be able to understand more about their background. Cognitive probes were designed to understand whether respondents understood what the overall question was asking, if the response categories allowed them to reflect how they think of themselves,

and whether asking for details about their category caused them to think about race, ethnicity, ancestry, place of birth, or some other classification.

4.1.2   Overall Item Performance

The Hispanic Origin/Race item was tested with 20 English language and 21 Spanish language respondents in Round 2. Table 4-1 shows the number of respondents with the targeted characteristics sought for this question topic based on their responses to the ACS questions and corresponding probes.

Table 4-1.   Number of respondents with targeted characteristics for the Hispanic origin and race question by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
	Afro-Latino	3	4	2	2	1	1	0	1
	MENA	4	NA	2	NA	1	NA	1	NA
	Multiracial	7	14	5	8	0	3	2	3
Hispanic origin and race	Foreign born w/ children born in U.S.	5	13	4	9	0	3	1	1

Driven by past research (e.g., Hunter Childs et al, 2010; Smirnova and Scanlon, 2013; Terry and Fond, 2013) and Round 1 findings indicating substantial confusion around the use of the terms "race" and "origin," Round 2 tested a generically-worded combined Hispanic origin and race question that asked "Which categories describe Person 1?" Both English and Spanish respondents had no problems understanding what the question was asking them, regardless of mode. Only 3 respondents were confused by the question, while 25 out of 41 respondents volunteered that it was easy to answer. In Round 1, we found that Hispanic respondents preferred a single item version and our Round 2 observations confirm that the combined item worked well. None of the 24 Hispanic respondents (3 English and 21 Spanish language) had any comments or concerns about the question incorporating both Hispanic origin and race.

Asking the follow-up question to collect one or more detailed categories elicited the same variety of responses related to people's origin, ancestry, etc. as it did in Round 1. Among the 17 respondents who commented on what they thought the detailed category was asking, most thought it was about

birth place, ancestry, origin or ethnicity (14), and 3 thought it was asking for more details about their race.

4.1.3 Key Findings on Q5 Category

Responses Are Mostly Consistent with Explanations of Background, and Are Seen as a Good Fit

Responses to cognitive probing revealed that this question correctly identified race and origin for 33 out of the 41 respondents. Furthermore, 32 said the category they selected was a good fit for how they normally think about themselves.

Six out of 41 respondents (3 English Paper and 3 Spanish CAI) explained in probing that their survey response does not fully fit the way they think about themselves. Five were unable to find a category that described them, and one erroneously marked a category that did not apply at all. Examples of the former problem appear below.

- One English language Paper respondent marked Hispanic and wrote in "Colombian," but described herself in probing as "White, Indigenous and Black" *(515019, Paper, English).*

- One Spanish language Paper respondent marked Black and wrote in "Mulato," but in probing acknowledged that she has a "natural tanned skin color" so that her "Mulato" response probably would have fit better under "Other" *(725020, Paper, Spanish).*

- One Spanish language CAPI respondent said she has always been considered White in Cuba but did not see any examples under the White category that fit, so she only answered as Hispanic *(425022, CAPI, Spanish).*

Multiracial Respondents Are Selecting More than One Category; Spanish Language Respondents Show Some Difficulty

Based on screener responses, survey responses, and probe responses, 21 respondents were identified as multiracial. However, 7 of those respondents (all Spanish language) identified themselves as

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multiracial in the two-question screening item,[1] but only as Hispanic in the single question ACS item. While most did not comment on why they provided two responses in the screener but only one in the ACS item, one Spanish language respondent did share that he thought the screener race item was asking him about the color of his skin *(125003, Paper, Spanish)*. Additionally, one English language respondent identified himself as both White and Middle Eastern/North African (MENA) in the screener, but clearly indicated in the probes that he only considers himself to be MENA and will answer White only when a MENA response is not provided *(117009, Paper, English)*. These eight respondents are not included in the analysis of multiracial responses to the Round 2 tested ACS item because they neither responded as multiracial in the ACS item nor did they indicate being multiracial in probing.

Of the 13 respondents (7 English, 6 Spanish) who identified themselves in probing as belonging to more than one category, 10 answered with more than one category for themselves (7 Paper, 3 CATI). Among the 3 who explained they are multiracial but only offered one response to the question, 2 were Spanish language respondents who reported that they did not answer "yes" to an applicable category because they didn't hear an example that matched the way they think of themselves. Only 1 respondent missed the instructions to mark all that apply. This seems to indicate that the instruction to provide more than one response is working as intended.

- One considers herself to be Afro-Latino (Dominican) but did not feel that any of the Black examples fit so did not report it *(125014, CATI, Spanish)*.

- One is Cuban and has always thought of herself as White but again did not think the examples in the White category applied to her so did not report it *(425022, CAPI, Spanish)*.

- The third, who described herself in probing as "White, Indigenous and Black" and from Colombia was not sure what to mark, but based on the Colombian example under Hispanic, only marked Hispanic. This respondent acknowledged that she missed the instruction to mark all that apply, and likely would have marked more responses had she seen the instruction *(515019, Paper, English)*.

MENA Respondents Embrace the Addition of a MENA Category

Similar to Round 1, all four MENA respondents in Round 2 were pleased about the new category for Middle Eastern/North African. All noted that they usually pick White or Caucasian for

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[1] The Spanish language screener asked a follow-up question of Hispanic respondents, "You said you were Hispanic. In addition to being Hispanic, do you also identify yourself as White, Black, Asian, or something else?"

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themselves, but with the addition of this category, they prefer to just indicate Middle Eastern and not White. While they were entirely happy to place themselves in this new category, one of the MENA respondents did have some concerns about the wording of the item and its examples.

- ■ This respondent wondered why Palestinian wasn't one of the examples for MENA. She questioned the inclusion of the North African category, saying she does not think that category belongs with Middle Eastern. She associates North Africa with countries like Sudan *(217259, CAPI, English)*.

Afro-Latino Respondents Tend Not to Mark Black

Among the seven respondents determined to be Afro-Latino based on their answers to the probes, four respondents did not say that Black was one of their categories (three Paper, one CATI), including one who left the entire question blank. Each was for a different reason, but all point to the need for some modifications to ensure that Afro-Latinos can accurately represent themselves on the ACS.

- ■ One respondent, who was mentioned earlier in this section, thought the Black examples did not apply to her *(125014, CATI, Spanish)*.

- ■ One respondent only described herself as Honduran, but when asked about her ethnicity, explained that she identifies herself as Garifuna, descended from Africa. She was not asked to comment on why she did not pick Black/African American to also describe herself *(125082, Paper, Spanish)*.

- ■ The third respondent, mentioned previously, missed the instruction to mark all that apply, noted that she always struggles with how to answer this question, and described herself as being Hispanic (Colombian) and mixed race, including White, indigenous, and Black *(515019, Paper, English)*.

4.1.4 Key Findings on Q5 Detailed Category

Detailed Categories Work Well for CAI, But Result in Missing Data for Paper

While for the interviewer administered modes, all 20 respondents provided a detailed response, in the paper mode, 8 out of 21 respondents left the write-in box(es) blank. Seven were either English language African American respondents (3) or Spanish language Hispanic respondents (4). The 3 African American respondents thought the write-in box was optional while the Spanish language

respondents tended to leave the boxes blank when they couldn't find themselves in the examples list.

Examples in Detailed Categories Are Limiting for Some

Ten out of 41 respondents across languages and modes seemed to interpret the examples list as finite, which in turn limited their response in some way (4 English, 6 Spanish; 5 Paper, 2 CATI, 3 CAPI). This manifested itself in several types of survey errors, including missing data, misclassification of responses, and errant responses.

For five respondents, the examples led to missing data either for an entire category, or for the detailed category.

- Two Spanish language Paper respondents decided to leave the box blank because the examples did not apply to them. One (Hispanic/Guatemalan) was looking for a Central American example *(125027, Paper, Spanish)* and one (Hispanic/Cuban) was looking for a Cuban example *(425018, Paper, Spanish)*.

- One Spanish language CAPI respondent (Hispanic/Cuban) said he normally would also say White for this type of question but because of the White examples, he only answered Hispanic *(425022, CAPI, Spanish)*.

- One Spanish language CATI respondent (Hispanic/Dominican) who screened in as Afro-Latino, said she specifically did not pick Black as a response because "dentro de los Negros, no me considero Afroamericana. No pertenezco" (within the Black category, I do not consider myself Afro-American. I do not belong there) *(125014, CATI, Spanish)*.

- One English language CAPI respondent (Black/African American) has French roots from New Orleans but did not know how to report this. When asked where she thinks French would go, R said probably under "Some other race or origin because where you have German, Irish, and English… and even though France is a part of the European community, it's not listed here specifically, so then I would put some other race or origin" *(515074, CAPI, English)*.

Two respondents answered with categories that did not perfectly fit the way they think about themselves.

- One English language Paper respondent (Hispanic/Colombian) massaged her answer to fit with the model of the examples, but acknowledged it did not necessarily fit with how she thinks about herself. If Colombian had not been included as an example, she would

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have likely written in her mix, "White, indigenous, and black," though she did not specify where she would have written this in *(515019, Paper, English)*.

■ One Spanish language CAPI respondent (Hispanic, Other/Latin American Peruvian) chose the Other category to be able to clarify his detailed category in the way he wanted to express it. The respondent mentioned that he could not find what he considers himself in the category choices, but he is "Hispano Latinoamericano" (Hispanic Latin-American), and that is why he also chose "Alguna otra raza u origen" (Some other race or origin) for "Latinoamericano-Peruano" (Latin-American-Peruvian) *(126010, CAPI, Spanish)*.

One respondent gave an entirely incorrect answer for his stepdaughter because her tribal affiliation was not mentioned.

■ The CATI respondents answered "Navajo Nation" because it was included in the examples provided and "Blackfoot," the correct answer, wasn't. During probing, R said that he picked Navajo nation because he didn't hear the interviewer say "Blackfoot," which is the tribe his stepdaughter came from *(117003, CATI, English)*.

Regardless of whether their own response was affected by the examples, seven respondents provided recommendations for additional examples that would have been helpful to them:

■ Add Palestinian to MENA examples *(217259, CAPI, English)*.

■ Add Brazilian to Hispanic examples *(515019, Paper, English)*.

■ Ask "tribal association" rather than "American Indian" *(515024, Paper, English)*.

■ Add a category for "Blanco, Latino" ("White, Latin") *(425022, CAPI, Spanish)*.

■ Ask whether person is from North, Central, or South America *(725019, CATI, Spanish)*.

■ Add Cuban or Caribbean to the examples in the Hispanic category *(425018, Paper, Spanish)*.

■ Add the word "etc." at the end of each set of examples to help respondents understand that they are just examples and not meant to be an exhaustive list *(215780, Paper, English)*.

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Respondents Confidently Answer for Other Householders; Foreign Born With Children Born in U.S. Have Little Difficulty Deciding on a Detailed Category to Report for Children and Generally Report Accurately

When asked to report the category and detailed category for other householders, nearly all respondents were able to do so without any difficulty. Similar to Round 1 findings, respondents had little difficulty answering the questions for other householders that were members of their family but were slightly less confident when answering for a nonrelative.

■ One Spanish language respondent mentioned that based on his conversations with his tenants and their friendship, he knows they are "Centroamericanos-Salvadoreños" but he really does not know about their personal lives. He cannot speak for them with certainty, he can only speak for himself but not for them *(126010, CAPI, Spanish).*

In Round 1, we had recommended that place of birth be moved before Hispanic race/origin because foreign born respondents with U.S.-born children were confusing origin with place of birth. While this change was not made for Round 2, we did not see as many people erroneously marking White in order to express that their child was born in the United States. Out of the 18 respondents in Round 2 who are foreign born with children born in the United States, 14 provided a response for a biological son or daughter. Among the 14, only 2 respondents adjusted the category responses for their children to account for the fact that they were born in the United States and speak English; both of them added a category of "White" (though neither provided a detailed "White" category). One was a Middle Eastern respondent *(117009, Paper, English)* and the other was a Spanish language Hispanic respondent *(725021, CAPI, Spanish).*

Ancestry Question Is Seen as Largely Duplicative of Detailed Category

In addition to the Hispanic origin and race questions that are asked in the household roster, respondents were asked an open-ended question about their ancestry or ethnic origin in the detailed section. As in Round 1, the focus of the testing in this round was to determine if respondents perceived this question to be duplicative of the Hispanic race and origin items.

Among the 40 respondents who answered the ancestry question, 24 provided the same answer in both questions (12 English, 12 Spanish; 12 Paper, 4 CATI, 8 CAPI), and 16 provided a different response (8 English, 8 Spanish; 8 Paper, 6 CATI, 2 CAPI). Regardless of whether they provided the same answer, 23 thought it was duplicative of the detailed category on the Hispanic origin/race

question (10 English, 13 Spanish; 9 Paper, 9 CATI, 5 CAPI). Interestingly, 6 of those respondents who thought the ancestry and Hispanic origin/race questions were asking the same thing provided a different response (2 English, 4 Spanish; 1 Paper, 5 CATI).

4.1.5   Recommendations

Keep the reference to "categories" rather than "race or origin."

- The revised Hispanic origin and race item tested well in all three modes among the 41 Round 2 respondents. Respondents appeared to interpret the question as intended, and 33 out of 41 provided an answer that matched how they described themselves during subsequent probing.

On the paper questionnaire, bold the text "**print details**" in order to provide greater emphasis that this task is not optional.

- While all CAI respondents provided an answer to the detailed category, slightly more than one-third of respondents in the Paper mode left the box blank.

Update the examples to reflect origins that more obviously apply to Hispanics.

- Among 23 Hispanic respondents in both languages and across modes, 4 respondents reported only one category when in fact more than one category applied to them. This often happened because they didn't find their origin in the examples. Note that 6 Hispanic respondents accurately answered with more than one category and 13 accurately responded with a single category.

- Add "Cuban" to the White category to emphasize that White is not just intended to mean European;

- Add "Guatemalan" to the Hispanic category so that a Central American country is represented; and

- Add "Dominican" to the Black category to encourage Afro-Latinos to mark both Black and Hispanic.

Add back a "closing" phrase ("or something else") to enhance verbal administration of the examples list and to emphasize that the list is not exhaustive.

- In Round 1 we recommended removing the phrase "and so on" from the end of the examples list as it was redundant with the phrase "for example" and was too vague an instruction for encouraging respondents to think beyond that specific list. In Round 2

we saw 10 respondents across all modes and languages commenting that examples were a complete list. We also noticed that in the CAI administration, the list of examples seemed to end too abruptly without some extending phrase at the end. We believe the English-language phrase "or something else" more explicitly encourages respondents to think of other examples than does the phrase "and so on" because it better invokes the implied question ("are you German, Irish, English or something else?"). In Spanish, the phrase "etc." (which was also used in Round 1) continues to be the best translation for extending the list of examples. For mode consistency, we recommend also adding this phrase in the paper mode.

Retain the current order of the categories and the MENA category.

- Respondents tended to not pay attention to the order, though four respondents thought alphabetical ordering could be a viable alternative.

- As in Round 1, MENA respondents were pleased to see this category and they used it for their responses.

Finally, in Round 1 we made a recommendation to address the problem of foreign born respondents wanting to report "White" or "American" for their U.S. born children by moving the place of birth question before Hispanic origin/race. We understand this is not possible given the current layout of the paper questionnaire, but we continue to see a few problems with respondents wanting to acknowledge that their children are U.S.-born. We suggest that the Census Bureau do more research to understand first generation respondents by testing the placement of the birthplace item. We do not believe this problem can be addressed by changing the Hispanic origin/race question.

4.2 Telephone Question

4.2.1 Background

Under the Communications Act, the Federal Communications Commission requires data about the number of households having telephone service to measure the extent of universal access to telephone service. State and local agencies use these data to develop plans that deliver emergency telephone service and help assess the extent to which elderly and low-income households have access to communication in case they need emergency medical or crime prevention services. As well, the Administration on Aging uses data about telephone service as a measure of social isolation among the elderly, one of the factors cited in the Older Americans Act as a source for "greatest social need."

Data collected during the 2011 ACS identified an anomaly in the estimated number of occupied households lacking telephone in rural counties within the state of Georgia. To address this issue and to incorporate the changing types of telephone service that are currently available, the question was presented separately from the facilities question and more detailed instructions about the types of telephone service to include were added. In Round 1 we found that most respondents answered the question accurately, except for a few of those who had cell service only (and thought the question was asking about landline service only); most understood the term "landlines" and most did not interpret the term "voice over Internet" as intended.

4.2.2   Overall Item Performance

In Round 2, we tested the telephone service question with 36 respondents (17 English, 19 Spanish). Of these, 34 respondents answered probes (16 English, 18 Spanish; 19 Paper, 6 CATI, 9 CAPI). Note that CATI respondents were asked the telephone service question even though this question will not be asked of CATI respondents in the ACS. This was in order to gather additional feedback on the question. There were no specific recruitment criteria for the telephone items. The question wording was the same across modes. Overall, we found that respondents are able to correctly report their telephone service, but that the issues we encountered in Round 1 persist.

4.2.3   Key Findings

Some Respondents Do Not Report Cell Phone Service

While 31 of 34 respondents appeared to have correctly reported their phone service type, 3 respondents (1 English CATI, 2 Spanish Paper) reported they did not have telephone service when in fact they did. Two of these (1 English CATI, 1 Spanish Paper) have cell phone service only and interpreted the question as asking only about landline service.

■   The respondent said first she answered "No" to this question because it did not specifically mention cell phone use, and because the question starts with the words "En esta casa" (In this house). she assumed it meant house phone. Because she does not have a house phone or "linea directa" (direct line) she said "No." During probing, she changed her answer to "Yes." *(425018, Paper, Spanish).*

Respondents Do Not Understand the Term 'Voice Provider'

The term "voice provider" was tested in Round 2 after we found that Round 1 respondents were confused by the term "voice over Internet." Round 2 respondents often did not interpret the new phrase as intended either, although this did not seem to impact the accuracy of their responses. Of the 34 respondents (16 English, 18 Spanish) who were probed on their interpretation of "voice provider," 25 got it wrong, describing it variously as:

- Answering services,

- Services for the disabled (teletype),

- Landlines,

- Cell phone plans without data,

- Companies providing automated calling services (such as for greeting messages or political campaigns), or

- Voice-activated dialing.

Only 6 English respondents (5 Paper, 1 CATI) thought "voice provider" included phone service provided via the Internet. Three of these were English respondents (1 CATI, 2 Paper) who mentioned "Magic Jack" or "Vonage" as voice providers, though one of these respondents also thought voice providers meant an answering machine (*117003, English, CATI*).

Respondents Prefer the Terms "Cell" And "Celular"

All 15 English respondents (10 Paper, 3 CATI, 2 CAPI) who were asked about the difference between "cell" and "mobile" said there was no difference between the terms. All 15 of them used the term "cell phone" when asked to describe the type of phone service they use in their homes; none used the term "mobile phone."

Over half (11 of 18) the Spanish respondents (6 Paper, 1 CATI, 4 CAPI) felt there was no difference between the terms "cellular" and "móvil." Five respondents (2 Paper, 2 CATI, 1 CAPI) reported some difference such as price, brand, type of use (personal vs. business) or location of use (home vs. public). Only 1 respondent stated a preference, for the term "celular," because it is clearer than "móvil" (*125014, Spanish, CAPI*). However, 13 Spanish respondents (6 Paper, 3 CATI, 4 CAPI) used

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the term "celular" when asked to describe their phone service in their own words, while only one used the term "móvil" (*225117, Paper, Spanish*).

4.2.4   Recommendations

Remove mention of types of telephone service from the question so that respondents are focused on what it's really asking, which is their ability to contact emergency services from their homes and communicate with others over the phone.

- The current question focuses on types of telephone service, which are becoming increasingly more varied and complex. Attempting to encompass all types in a lengthy instruction is burdensome for respondents to read and introduces potential response error from those who may become confused about what type of service the question is asking about.

- In both Rounds 1 and 2 we observed two respondents with cell service only misreporting because they interpreted the question as asking about landline service only. This problem is likely to increase as more of the U.S. population switches to cell service only. Removing mention of types of telephone service is one strategy for addressing response error such as this.

If the current question format is retained, use the term "cell phone" or "cellular phone" without "mobile." Use the same term across the telephone and Internet access questions.

- Both English and Spanish respondents tended to use "cell" when describing in their own words how they make calls.

- Our expert reviewers recommend choosing only one term, to reduce both question length and cognitive burden.

- The word "mobile" is currently used in three different contexts within the Housing section – mobile phone provider, mobile home, mobile broadband. Using "cell" at the telephone service question eliminates one of those, which may in turn reduce cognitive burden.

Retain the telephone question in its current position relative to the computer/Internet questions.

- Findings from Round 1, in which we tested the telephone question appearing both before and after the computer/Internet questions, did not point to either order having an impact on response. Round 2 testing produced no evidence that respondents in the Paper mode thought the telephone service question was redundant with the subsequent computer/Internet questions.

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4.3 Computer and Internet Questions

4.3.1 Background

The Census Bureau is concerned that the ACS question about computing devices and Internet access fail to reflect changes in technology since 2009 when cognitive testing was last conducted with the current questions. Of particular concern is the terminology used to refer to smartphones ("smart mobile phones" on the current ACS) and tablets (not mentioned at all on the current ACS).

The Census Bureau devised two versions of these questions for Round 1 testing. The main differences related to terminology (e.g., "plan purchased" vs "paid subscription"), placement (e.g., tablet with desktop or with other portable wireless computers), and order in which the different Internet plan types were presented. We found significant misinterpretation around phrases such as "notebook," "subscription," "plan purchased" and "broadband high speed." Recommendations included removing "tablet" from the "desktop/laptop" category; rewording the Internet access question to include cell phone companies and to focus on "paying for" the service; and adding examples to the "broadband (high speed)" category. In addition to these changes, we also tested a separate question in the CAI version that asked about smartphones with paid data plans and that are used to make and receive phone calls.

4.3.2 Computer Devices

4.3.2.1 Overall Item Performance

The computer devices question was tested with 20 English language (10 Paper, 5 CATI, 5 CAPI) and 18 Spanish language (10 Paper, 2 CATI, 6 CAPI) respondents in Round 2. Three Spanish respondents (1 Paper, 2 CATI) did not respond to these questions.

Table 4-2 shows the number of respondents who had the characteristics that were targeted for the Computer Devices and Internet Access topics.

Table 4-2. Number of respondents with targeted characteristics for the computer and Internet questions by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
Computer and Internet use	Internet access via data plan only	3	8	1	3	2	3	1	2
	WiFi-only access	0	1	0	0	0	0	0	1

When asked if any members of the household own or use desktops or laptops, smartphones (Paper only), tablets or other portable wireless computers, or other types of computers, almost all (30 of 35) respondents were able to report their computer devices correctly. Among the 5 who had some type of problem, 2 failed to report a device because they thought the question was only asking about devices that connect to the Internet (1 English Paper, 1 Spanish CAPI). One Spanish language paper respondent wrote in "laptop" under "Some other type of computer" because he was not familiar with the term "computadora portátil," and 2 Spanish language respondents (1 Paper, 1 CAPI) double counted their laptops in the tablet category.

Spanish respondents were asked if they preferred the term "computadora portátil" or "laptop" to refer to laptop computers. Thirteen of the 16 respondents who answered this question (8 Paper, 2 CATI, 3 CAPI) said they prefer the English term "laptop." They noted that "laptop" is shorter and easier to say and felt it's used more commonly in the United States than is the Spanish translation.

4.3.2.2 Recommendations

Leave the computer devices question as it is.

■ Thirty of 35 respondents provided accurate information about the computer devices in their households. The small number of problems we observed are either addressed in our recommendation about the Spanish translation (2 respondents who didn't recognize the translation for "laptop") or are not significant enough to address with further revisions.

In the Spanish translation, use the English term "laptop" instead of "computadora portátil."

■ Thirteen of 16 Spanish respondents preferred the term "laptop," many of them pointing out that it's the term most commonly used in the United States for that device.

4.3.3　CAI Smartphone Question

4.3.3.1　Overall Item Performance

All 20 CAI respondents (10 English, 10 Spanish) who received the CAI smartphone question answered "Yes," indicating that they had a smartphone and paid for a plan to both make calls and access the Internet. This includes one respondent who erroneously answered "Yes," explaining she uses WiFi to access the Internet rather than a data plan (*725019, CATI, Spanish*). Even among those whose responses to the question were correct, concurrent probing about what they thought the question was asking revealed that 15 respondents (9 English, 6 Spanish) missed one or more of the four key aspects of the question.

- All 15 failed to note that the question was asking if they could make calls from the smartphone, though this was likely implied by understanding that it was asking about their phone.

- Six respondents (4 English, 2 Spanish) did not mention paying for a data plan.

- Three respondents (2 English, 1 Spanish) did not mention accessing the Internet through the phone's data plan.

Only 5 respondents (1 English, 4 Spanish) picked up on all four parts of the question.

Furthermore, 14 of the 20 CAI respondents (9 English, 5 Spanish) were asked about the difference between the questions "At this house/apartment/mobile home/unit, do you or any member of this household pay for a plan for a smartphone or mobile device to access the Internet and make phone calls?" and "At this house/apartment/mobile home/unit, do you or any member of this household pay a cell phone company or Internet service provider to access the Internet?" Half of them (6 English and 1 Spanish respondent) said the questions were duplicative. The other half (3 English and 4 Spanish) understood that the questions were different, and that the first question ("… pay for a plan for a smartphone or mobile device") referred only to smartphones, while the second question ("… pay a cell phone company or Internet service provider") asked more broadly about any Internet access they may have.

4.3.3.2   Recommendations

Eliminate the CAI question about smartphone data plans. This would also require adding "smartphone" to the CAI question about computer devices.

- This question is cognitively difficult to process and introduces a high likelihood of response error among those whose situations do not exactly match all four parts of this question. Almost all Round 2 respondents with smartphones also paid for Internet data plans, which is the most common situation for those with smartphones. While all of them answered the question correctly, over three-quarters of them were unable to tend to all parts of the question. The one respondent with an atypical situation – she had a smartphone but did not pay for a data plan on it – answered "yes" when she should have said "no."

- The Census Bureau will be able to more accurately measure use of paid smartphone data plans by combining data from the questions on computer devices (which asks about smartphones in a separate category), Internet access (which asks about paying a cell phone or Internet service provider for Internet access), and type of Internet access (which asks about mobile broadband plans in a separate category).

4.3.4   Internet Access

4.3.4.1   Overall Item Performance

Forty respondents (20 English, 20 Spanish) were asked whether they pay for Internet access at their home (1 Spanish Paper respondent did not answer the question). The question was asked as one-item on Paper and two items in CAI. Thirty-four respondents appear to have answered correctly. Five respondents (1 English, 4 Spanish; 2 Paper, 2 CATI, 1 CAPI) answered "No Internet access" yet clarified during probing that they or some other member of the household did indeed have Internet access. One Spanish Paper respondent answered "Yes" but incorrectly reported paying. Most of these respondents (1 English, 5 Spanish; 3 Paper, 2 CATI, 1 CAPI) appear to have answered incorrectly because they were misinterpreting the phrase "At this house/apartment/mobile home/unit…"

4.3.4.2   Key Findings

Respondents Find "At This House" Limiting in Reference to Internet Access

Six respondents (1 English, 5 Spanish; 3 Paper, 2 CATI, 1 CAPI) seemed to misinterpret the Internet access question due to the phrase "At this house/apartment/mobile home/unit…" Three respondents (1 English CATI, 2 Spanish Paper) thought it was asking about the availability of Internet access for all members of the household, and so answered "no Internet access" if one or more members did not access the Internet at home. For example, one English respondent reported that only her stepdaughter accesses the Internet in the household, via her phone, and "for the general purposes of the house, we don't try to use her phone to access the Internet" (*117003, CATI, English*). A Spanish respondent stated during probing that while her computer has Internet access, because her husband and son do not use her computer, she does not consider them to have Internet access at home (*125003, Paper, Spanish*).

Three Spanish (1 Paper, 1 CATI, 1 CAPI) respondents answered "No Internet access" yet all indicated they had Internet access via their phones during probing. The Paper respondent also answered "Yes, by paying" because while her house does not have Internet, she pays a cellphone company for a data plan (*425018, Paper, Spanish*).

Respondents See Little Difference Between "Access" and "Use" Terminology, but Show Slight Preference for "Access" and "Accedar"

Most English language respondents (17of 20) felt there was no difference between "use" and "access" the Internet. Just 2 English language respondents said that they would change their answer if they question asked about "use" of rather than "access" to the Internet, but both answers would have been problematic.

- One respondent said that "use" can imply "borrowing" WiFi from neighbors, rather than paying for access, so she might have marked both "yes" options (*217268, Paper, English*).

- The other respondent, mentioned earlier, erroneously answered "no" in spite of her step-daughter accessing the Internet via her smartphone and using the local recreation center to use the Internet. If the wording had changed to ask about "use" of the Internet, this respondent indicated she would have changed her answer to "yes" to

reflect her recreation center usage, but still would have missed her step-daughter's Internet usage *(117003, CATI, English).*

English language respondents were divided over which term to use, with a slight preference for "access": 6 respondents (4 Paper, 2 CAPI) preferred "access," 4 preferred "use" (1 Paper, 2 CATI, 1 CAPI). The rest provided no comments on whether they preferred either of the terms.

Most (13 of 16) Spanish (8 Paper, 2 CATI, 3 CAPI) respondents said there was no difference between "usar" and "accedar." Spanish language respondents who expressed a preference were divided, with 6 respondents (3 Paper, 1 CATI, 2 CAPI) preferring "accedar" and 5 respondents (3 Paper, 2 CATI) preferring "usar." Two respondents reported they preferred different terms, such as "buscar," "meterte," "explorer," or "navegar" *(225102, Paper, Spanish; 225117, Paper, Spanish).*

4.3.4.3   Recommendations

Continue to Use "Access" and "Accedar" in the Internet Access questions.

- Thirty of 36 respondents (17 English, 13 Spanish) interpreted the two words as meaning the same thing and among respondents from both language groups who expressed a preference, slightly more chose "access."

Use "have access to the Internet" instead of "access the Internet."

- Four respondents answered the question thinking about their habits of Internet use at home rather than focusing on their actual ability to access the Internet at their house. We anticipate this becoming more of an issue as Internet access technology grows increasingly mobile. We further believe that "have access to the Internet" more accurately conveys the intent of this question.

Skip respondents who answer "yes, without paying" past the subsequent question about types of access.

- Since one of the Round 1 revisions from Round 1 was to add cell phone plans into the Internet access question, those who are saying they do not pay a cell phone company or Internet service provider do not need to be asked what type of access they have in their household because they will be accessing open or publicly available Internet services such as their neighbor's WiFi, an Internet café, or a community-wide Internet service.

4.3.5   Type of Internet Access Questions

4.3.5.1   Overall Item Performance

The questions asking if the household accesses the Internet using mobile broadband, broadband, satellite, dial-up, or some other service were tested with 37 respondents (19 English, 18 Spanish; 20 Paper, 7 CATI, 10 CAPI); 4 Spanish respondents skipped all Connect to the Internet questions entirely.

By examining not only their explanations of responses to these questions but also reviewing how respondents had answered prior questions about smartphone usage and computer devices, we determined that 19 out of 37 respondents (15 English, 4 Spanish) answered the connection questions accurately; 2 Spanish respondents did not provide enough information in this series of questions to determine if their answers were correct.

A total of 16 respondents, including 4 English and 12 Spanish respondents (9 Paper, 3 CATI, 4 CAPI) provided answers to this set of questions that were inconsistent with how they verbally described their modes of access in response to probes.

- Two Spanish language Paper respondents said no to all of the items, when answers to prior questions suggest that they or someone in their household does have access to the Internet, either through a smartphone or a computer device.

- All 4 English language respondents and 3 of the Spanish language respondents failed to report having mobile broadband, in spite of having mentioned that someone in the household has a smartphone with Internet access in previous questions.

- Conversely, three Spanish language Paper respondents failed to mark broadband, satellite, or dial-up in spite of talking about using a laptop or computer to access the Internet in prior probes.

- One Spanish language CAPI respondent marked mobile broadband and broadband when it appears they only have mobile access to the Internet through a smartphone.

- Three Spanish language respondents were unsure what type of Internet access they have in their home, either guessing or answering with more than one category out of confusion.

The following section presented more detailed information about why respondents had so much difficulty with this set of questions.

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4.3.5.2   Key Findings

Mobile Broadband Terminology Is Poorly Understood and May Result in False Negatives Due to Question Stem

Among the 16 respondents who gave some inconsistent response to the Internet connection questions, 8 were respondents who should have answered mobile broadband but did not (4 English, 4 Spanish). All of these respondents had mentioned earlier that they pay for a plan for their smartphones to access the Internet.

The 4 Spanish respondents were all confused by the terminology "mobile broadband," and three of the 4 English respondents were focusing on the stem of the question asking about accessing the Internet at their home. One respondent explained that 99 percent of the time he is using WiFi at his home, so he said no to mobile broadband *(117009, Paper, English).* Another explained that he has a smartphone plan but that it is not attached to his condo, whereas he gets broadband through his condo *(217267, CAPI, English).*

Several respondents who answered the question correctly were also confused by the terminology, including 4 who said they were unfamiliar with the term "mobile broadband" and 11 respondents who misinterpreted what it meant (8 English, 3 Spanish). These respondents described it as a "hotspot," a "feature plan," allowing you to "connect onto WiFi" or "save a lot of information on a smartphone," or a "convenient and big" cell phone.

While 8 respondents (6 English, 2 Spanish) understood that mobile broadband and broadband were referring to different types of Internet access, 4 respondents (1 English, 3 Spanish) did think they might be the same.

Broadband Terminology, Including "Banda Acha" Is Unfamiliar, Though Addition of "High Speed" Adds Clarity

Among the 16 respondents who answered the Internet connection series incorrectly in some way, just one respondent should have answered broadband because his building provides Internet access but said no to this *(425018, Paper, Spanish).* However, 4 Spanish language respondents said they have

broadband when they actually do not, including 3 who mentioned in earlier questions that the only way they can access the Internet is through a smartphone data plan.

This is indicative of a more significant problem with this item, that respondents do not understand what is meant by broadband or "banda acha." Across all 37 respondents to this series of questions, 17 indicated that they were unfamiliar with the term broadband or misinterpreted it when trying to explain it (9 English, 8 Spanish), including 6 Spanish language respondents who specifically noted they had never heard of "banda acha."

Among the 9 respondents who answered yes to the broadband category and provided an explanation of their connection, only 2 respondents described it as broadband (both English). Four described their plan as "high speed" (3 English, 1 Spanish), 2 mentioned "DSL" (both English), and one mentioned "cable" (Spanish).

Respondents were split over whether broadband and high speed were referring to the same construct, with 13 respondents saying they're the same thing (10 English, 3 Spanish), primarily because they don't understand what broadband (or banda acha) means but referencing that advertising usually talks about high speed and broadband in the same messaging. Eleven respondents thought the terms meant something different (7 English, 4 Spanish), mainly explaining that "high speed" is a faster form of broadband.

Satellite Terminology Is Less Understood, But Those Who Have It Are Certain

Across all 37 respondents, 17 respondents were unfamiliar with satellite as a way of delivering Internet access or misunderstood what it meant. However, only 3 respondents answered that they had satellite Internet service (1 English, 2 Spanish), and all three appeared to have been correct, based on their explanations of their answers. One additional Spanish language respondent answered broadband but was not actually sure if it was a broadband or satellite connection. She mentioned that they use an antenna (*725019, CATI, Spanish*).

4.3.5.3   Recommendations

Use "have access to the Internet" instead of "access the Internet."

■ Four respondents answered the question thinking about their habits of Internet use at home rather than focusing on their actual ability to access the Internet at their house. We anticipate this becoming more of an issue as Internet access technology grows increasingly mobile. We further believe that "have access to the Internet" more accurately conveys the intent of this question.

Skip respondents who answer "yes, without paying" past the subsequent question about types of access.

■ Since one of the Round 1 revisions from Round 1 was to add cell phone plans into the Internet access question, those who are saying they do not pay a cell phone company or Internet service provider do not need to be asked what type of access they have in their household because they will be accessing open or publicly available Internet services such as their neighbor's WiFi, an Internet café, or a community-wide Internet service.

Remove the phrase "at this house, apartment or mobile home" from question 12 (types of Internet access) and add "installed in this household" to the end of the broadband high-speed, satellite, and dial-up categories. In CAI, use "installed in this <house/apartment/mobile home/unit>."

■ Most Group 1 respondents misunderstood the terms mobile broadband or broadband (high speed). This suggestion should help respondents more easily differentiate between smartphone data plans, which are not tied specifically to a place, and other ways of having access to the Internet that <u>are</u> tied to a place.

Redesign the mobile broadband category to put less emphasis on duplicative use of the term "broadband."

■ Most respondents misunderstood the term "mobile broadband" and at least 8 (4 English, 4 Spanish) answered incorrectly because of their misinterpretation. Some also confused it with the broadband (high-speed) category.

■ We suggest using a phrase such as "cellular data" that more obviously differentiates this category from the broadband (high-speed) category. Also, 17 respondents (10 English, 7 Spanish) used the terms 3G, 4G, or LTE to describe the way they access the Internet on their smartphones. Therefore, our suggested revision includes terminology that respondents themselves use to describe their smartphone data plans.

Move the examples for broadband (high speed) closer to the beginning of that category.

- To increase the likelihood that respondents will notice the examples, and to match the suggested formatting for the mobile broadband category (with examples immediately following the category name) and the other two categories (with "installed in this household" appearing at the end), we suggest moving the examples of cable, fiber optic, and DSL immediately after "broadband or high-speed Internet service."

- In Spanish, we recommend using the English term "broadband" rather than "banda acha." In combination with "alta velocidad," we think this will produce higher recognition and understanding.

Detailed Findings for Group 2 Topics 5

The Group 2 protocols tested potential revisions to the health insurance, premium, and subsidy items, as well as the questions about commuting mode, time left for work, and weeks worked.

5.1   Health Insurance Questions

5.1.1   Background

The health insurance questions elicit data on type of health insurance currently held by each individual in the household. One purpose is to give Federal, state, and local policymakers accurate information about the insured and uninsured. State and local governments use these statistics to target outreach and enrollment efforts for programs like Medicare, Medicaid, and the Children's Health Insurance Program. Measuring health insurance status also helps public health agencies plan to meet current and future health care needs. We tested two versions of the health insurance question in Round 1, with the 2 main differences being inclusion (or not) of "Healthcare.gov" in item D (about insurance purchased directly or from the marketplace) and location of the instruction to not include plans that only cover one type of service, such as dental, drug, or vision plans. Key Round 1 findings were that almost half the Spanish language respondents couldn't correctly identify the type of insurance they have; close to one-third of English language respondents reported their insurance in more than one category; some respondents marked item A (employer-based insurance) to indicate that other family members had coverage, even if it wasn't employer based; respondents who signed up for Medicaid through a marketplace website were confused about whether to mark item B (Medicaid) or item D. We therefore recommended, and tested in Round 2, revised wording in item A, the addition of Healthcare.gov to item D, and an edit check in CAI to catch those who report more than one insurance type if one of those is employer based.

5.1.2   Overall Item Performance

The questions regarding health insurance were tested with 20 English language and 18 Spanish language respondents in Round 2. One Spanish-language respondent was not administered the

insurance questions due to lack of time. Table 5-1 shows the number of respondents who had the characteristics that were targeted for the Health Insurance topic in Round 2. Table 5-2 shows each respondent's answers to the health insurance question.

Table 5-1. Number of respondents with targeted characteristics for health insurance questions by language and mode

		Total		Paper		CAPI*	
		English	Spanish	English	Spanish	English	Spanish
Health insurance	Medicaid	5	9	2	5	3	4
	State-based marketplace users (CA, MD, DC)**	2	1	1	1	1	0
	Insurance purchased directly (NOT employer based)	2	0	1	0	1	0

*All Group 2 CAI interviews were conducted with the CAPI script to maximize the number of respondents exposed to the telephone question (which CATI respondents do not receive) and the show card for the commuting mode response options (the commuting mode question is open-ended in CATI).

**Five English and four Spanish respondents reported marketplace insurance at screening. Based on their interview results, however, this turned out not to be true for six of them.

Table 5-2. Respondents' answers to the health insurance question

	English	Spanish
Medicaid	5	9
Insurance through a current or former employer	8	3
Insurance purchased directly from an insurance company or through a state or federal marketplace		
Directly from insurance company	1	
Marketplace	2	1
Not insured	1	1
Other	1	3
VA	1	
Medicare	1	
Yes to all response options		1
Total	20	18

Based on answers to probes, 16 of the 20 English-language respondents and 11 of the 18 Spanish-language respondents answered the health insurance question correctly. Of the 4 English-language and 7 Spanish-language respondents who answered incorrectly, three were covered under Medicaid (1 English, 2 Spanish; 1 Paper, 2 CAPI) and incorrectly marked more than one response; 4 Spanish-language respondents (1 Paper, 3 CAPI) misinterpreted the question or didn't know what type of

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insurance they had; and 4 (3 English, 1 Spanish; 1 Paper, 3 CAPI) incorrectly categorized the type of insurance they have.

5.1.3   Key Findings

Most Respondents With ACA or Medicaid Insurance Correctly Categorized Their Health Insurance Type

Three respondents (2 English, 1 Spanish) reported insurance coverage through the Affordable Care Act (ACA), and 14 reported being insured through Medicaid (5 English, 9 Spanish). With the exception of 1 respondent *(125141, CAPI, Spanish)*, who was unsure what type of insurance she had, the 2 other individuals covered under ACA correctly selected 15d. Each reported having gone through the state marketplace (Covered California and Maryland Health Connections) and indicated that selecting a response was "easy."

Three of the 14 Medicaid respondents incorrectly double-counted in reporting their insurance (see below). The remaining 11 Medicaid beneficiaries reported no difficulties answering the question.

Double-Counting Was Significantly Reduced from Round 1; Those Who Did Double-Count Were All Medicaid Beneficiaries

In Round 1, 18 of 57 English language respondents double-counted their health insurance. Round 2 saw a significant decline in this phenomenon, with only 3 respondents (1 English, 2 Spanish), all Medicaid beneficiaries, reporting more than one type of insurance. One respondent (*115024, CAPI, English*) selected both Medicaid and Marketplace because she had gone to health care.gov for her insurance and found out she qualified for Medicaid. Another respondent (*125035, Paper, Spanish*) mistakenly answered both for her own and her children's health insurance coverage when responding for Person 1. She admitted to being confused by the phrase, "Of this person or another family member" and assumed the other family members should be reported here as well. The third respondent marked Medicaid and 15h to report her coverage through AmeriGroup, the insurance plan selected by the Medicaid program to deliver health care (*127006, CAPI, Spanish*).

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Spanish Language Respondents Were Not Always Certain What Type of Insurance— if Any—They Had or How Their Coverage Matched With the Response Options

Three respondents (*125135, CAPI, Spanish; 125209, Paper, Spanish; 225013, CAPI, Spanish*) were un-insured but attempted to select a category that would match their services through the community clinic. A fourth respondent who apparently received her coverage through the Affordable Care Act (*125141, CAPI, Spanish*) marked all options but only because she did not know what kind of insurance she has. None of the four was born in the United States and thus may not have been familiar with the structure of this country's health care system. At this time, we do not have a recommendation for item revision but merely note this as a potential source of response error.

A Few Respondents Had Difficulty Classifying the "Type" of Insurance They Have

Four respondents (3 English, 1 Spanish) knew details about their insurance coverage but incorrectly classified what "type" of coverage they have. Two respondents incorrectly classified their employer-based coverage: One answered 15a-Employer and 15h-Other, reporting both her husband's employer-based insurance and her own employer-based insurance, when she should have selected 15a only to account for both (*515037, CAPI, English*).). A second respondent (*225115, Paper, Spanish*) incorrectly reported her coverage under her husband's employer-based insurance as a direct purchase (15d). Two respondents incorrectly marked 15h: one (*315044, CAPI, English*) reported his insurance purchased through AARP as "Other," but the correct response should have been 15d. A Medicare beneficiary (*515014, CAPI, English*) reported her Medicare supplemental policy as "Other" when it should have been reported as a direct purchase (15d).

Mixed Attention Is Paid to the Instruction "Do NOT include plans that cover only one type of service, such as dental, drug or vision plans."

Twenty-six of the 38 respondents were probed specifically about the instructions to not include plans that cover only one type of service. No respondents actually reported such a plan when responding to the question, but attention to the instruction was mixed: 13 respondents (7 English, 6 Spanish) said they noticed the instruction; 8 (7 English, 1 Spanish; 7 Paper, 1 CAI) said they did not notice them at all; and 4 (1 English, 3 Spanish; 2 Paper, 2 CAI) misinterpreted what they were trying to convey.

Most Respondents Are Able to Answer for Other Household Members

All respondents were able to answer the health insurance question for other household members, and all but three Spanish language respondents reported that they were certain of their answers. Of those three (2 Paper, 1 CAPI), two were reporting on family members (sister and husband).

Four CAPI respondents (2 English, 2 Spanish) had at least one family member who was covered under the same plan as they (the respondents) were. Only one answered incorrectly, reporting that his 14-year-old son, who is covered under the respondent's employer-provided plan, was instead covered by insurance purchase directly. His rationale was that his son doesn't work (*115034, CAPI, English*).

5.1.4   Recommendations

In CAI, add an edit check to those who report both Medicaid and insurance purchased directly.

- In both Rounds 1 and 2, we observed Medicaid respondents who double-counted their insurance type because they had signed up for Medicaid through a state or Federal marketplace website.

In CAI, match the wording of item H more closely to that of the other category on Paper. For consistency with CAI, reword the "specify" instruction on Paper to say "name of plan."

- Although we observed fewer respondents double-counting in Round 2 than in Round 1, we notice a slight trend in Round 2 for respondents to incorrectly report an insurance type in item H that should have been reported in a previous category. While we don't expect respondents to notice or fully understand the distinction between "types" of plans and actual number of plans they have, adding words that remind them not to include insurance types that have already been listed may help reduce such errors.

Retain all other aspects of the Round 2 versions of the health insurance, premiums and subsidies questions.

- Round 2 findings did not strongly suggest updates to any other revisions from Round 1.

5.2   Premium Questions

5.2.1   Background

The purpose of the premium question is to elicit data on whether there is a monthly premium for the health insurance plan(s) held by the respondent or other household member(s). In Round 1, we tested two versions of the question, with the key difference between them being the inclusion or not of a definition of *premium*. Overwhelmingly, Round 1 respondents found the inclusion of a definition to be helpful; however, describing premiums as "monthly" payments was a source of potential error as respondents reported making premium payments at different time intervals (e.g., every 2 weeks, quarterly). The recommendation for the Round 2 item was to include a definition of premium that referred to payments on a "regular basis" rather than monthly. In addition, Westat recommended adding "una prima" to the Spanish version of the question, which in Round 1 used only the term "cuota."

5.2.2   Overall Item Performance

The question regarding health insurance premiums was tested with 20 English language and 18 Spanish language respondents in Round 2. The targeted characteristics sought for this question topic are the same as those for the health insurance question, as shown in Table 5-1.

Overall, the Round 2 version of this question worked well. Of the 38 respondents who received the premium question, 35 (18 English, 17 Spanish; 17 Paper, 18 CAI) appeared to have provided an accurate answer about their premiums. Eleven respondents (3 English, 8 Spanish; 6 Paper, 5 CAI) reported the definition to have been helpful in answering the question, and our analysis revealed none of the confusion over payment intervals that occurred in Round 1.

None of the problems noticed among the three respondents who answered incorrectly appears to warrant an item revision. Two English respondents, both of whom have insurance through their employers, answered the question wrong by saying they did not pay a premium. Probing revealed that one (*217255, Paper*) thinks of his premium as a "deduction" (since it's deducted from his paycheck) and the other (*515007, CAPI*) had not been thinking about the money that is deducted from her paycheck when she answered the survey question. The one Spanish respondent (*125209, Paper)* is actually uninsured but answered "yes" to the health insurance question, thinking about

services she receives from a local health clinic, and "yes" to the premium question, thinking about the copayments she makes at that clinic.

Twenty-eight (16 English, 12 Spanish) of the 38 Group 2 respondents who answered the Health Insurance question answered the Premium question for other household members. All but one respondent said they were certain about their answers. However, 7 of these (5 English, 2 Spanish) appear to have reported inaccurately about the other household member's premium. Two of these 7 were among the 3 who made mistakes in reporting on their own premiums, too. The reasons for the inaccurate answers about other household members mirror those that respondents made with their own answers such as answering "yes" for copayments, not premiums and saying "no" when in fact the premiums are deducted from the other person's paycheck.

5.2.3   Recommendations

Retain the current wording for the premiums question. Most Round 2 respondents are interpreting it as intended and answering it in a way that appears to accurately reflect their situation.

Skip all but those who answer "yes" to item D past the premium and subsidy questions. See more information about this recommendation in Section 5.3.3 (Recommendations for the subsidy question).

5.3   Subsidy Question

5.3.1   Background

The purpose of the subsidy question is to assess whether the insurance premiums being paid are subsidized by the government in any way. Three versions of the question were tested in Round 1: version 1 asked about premiums that are "subsidized based on family income." Versions 2 and 3 asked about whether a tax credit or subsidy is received to help pay the monthly premium. Version 2 reminded the respondent that this tax credit or subsidy may be for "you or another family member," whereas version 3 did not mention this specific language. Respondents liked the emphasis on the subsidy or tax credit being based on income, which provided them with contextual clues in case they were unfamiliar with subsidies or tax credits. In many cases, the inclusion of the term "tax credit"

caused some confusion, but mentioning subsidies without also mentioning tax credit was equally problematic. Based on these findings, we recommended new item wording to test in Round 2 that incorporated successful elements from all three Round 1 versions.

5.3.2   Overall Item Performance

Thirty-four Group 2 respondents were asked question 16b. The 17 respondents who were covered by insurance *other than* through the ACA or Medicaid correctly responded "no," although several reasoned their way through the question before answering, such as the following individual:

- "[The question is] very clear but… in my mind I thought my employer's paying a substantial portion of my premium. I'm paying a couple hundred dollars a month; they're paying several hundred dollars a month. The question is clear, I just needed to process that." [*115036, English, Paper*]

The remaining 17 respondents were Medicaid beneficiaries (5 English, 9 Spanish) or covered under ACA (2 English, 1 Spanish). Twelve of those on Medicaid answered "no" and 4 answered "yes." Reasoned one respondent who answered "no," "I don't pay a premium, so I don't get any help to pay the premium" (*315071, CAPI, English*). Two of the 4 who answered "yes," along with one other who changed her answer from "no" to "yes" during probing, reasoned just the opposite.

- "Because I answered the prior question… what kind of health care I had so you're asking whether this kind of health care is government assisted… whether you're being assisted by the government." (*115024, CAPI, English*)

- "Do I receive help for paying for insurance is how I understood it and we do." (*515020, Paper, English*)

- During retrospective probing, the R… asked the question to be read again (for a fourth time). She stopped the Interviewer at "financial assistance" and said that was the part that made her change her answer to "yes." The phrase "financial assistance" made her think of Medicaid. (*215009, Paper, English*)

Of the three respondents who receive medical insurance through the ACA, one answered "yes" and two answered "no." The first (who answered "yes") was sure he receives government assistance to help pay his premiums (*515097, CAPI, English*); one didn't know whether he receives help (*115036, Paper, English*); and one knows she doesn't have to make monthly payments for her health coverage and so interpreted that as not needing any assistance (*125084, Paper, Spanish*).

5.3.3   Recommendations

Skip all but those who answer "yes" to item D past the premium and subsidy questions.

- It appears the premium and subsidy questions are most relevant for those who are covered under the ACA. Skipping all others around these questions reduces both respondent burden and the risk of false positives from respondents to whom the questions don't really apply.

- Given that Medicaid recipients are by definition receiving subsidized health care, skipping such respondents around the premium and subsidy questions further reduces the risk of response error.

- Ideally the premium and subsidy questions would be asked only of those covered under the ACA. However, it would be too complicated to separate out those who purchase insurance directly (but not through the ACA) in a skip instruction.

5.4   Cohabitation/Domestic Partnership Questions

5.4.1   Background

The Census Bureau asks marital status questions to help Federal, state, and local agencies as well as businesses understand marriage trends, family well-being, and policies and programs that may be affected by marriage trends such as tax policies and financial assistance programs. Given that many states have now legalized same-sex marriage, the Census Bureau needs to be ready to provide data on emerging family forms, such as same-sex marriage and domestic partnerships. Therefore, in an effort to improve measurement of co-habiting partnerships and perhaps, by extension, measurement of children's living arrangements, two new questions were added after the marital status question. The first asks whether the person is living with a boyfriend/girlfriend or partner in the household and the second asks whether the person is in a registered domestic partnership or civil union. These questions were tested in Round 2 with Spanish language respondents only.

5.4.2   Overall Item Performance

The questions regarding cohabitation and domestic partnership were tested with 3 Spanish language respondents in Round 2. We made intense efforts to recruit Spanish language respondents in

unmarried cohabiting relationships across the various markets, such as posting ads on Craigslist and conducting outreach at, for example, a festival for gay, lesbian, bisexual, and transgender individuals. Nevertheless, only 7 respondents screened in with this characteristic, 5 of these were scheduled for an interview, and ultimately, only 3 of these respondents were interviewed. Table 5-3 shows the targeted characteristics of the respondents that were interviewed.

Table 5-3. Targeted characteristics of respondents to cohabitation/domestic partnership questions by language and mode

		Total		Paper		CAPI	
		English	Spanish	English	Spanish	English	Spanish
Cohabitation and domestic partnership	Unmarried couples (same or opposite sex)	NA	3	NA	1	NA	2

While only 3 respondents satisfied the criteria of being in an unmarried cohabitating relationship, an additional 9 Spanish language respondents were exposed to the questions and probes since they are not currently married. This analysis focuses first on the cohabitating respondents, and then on the additional respondents who commented on the series of questions. The probes on cohabitation were only asked of the respondent and not of persons 2 and 3.

Cohabitating Respondents

All three cohabitating respondents answered that they are not currently married, that they are currently living with a boyfriend/girlfriend or partner, and that they are not currently in a registered domestic partnership. For two of the respondents, these answers appear to be accurate based on the probes. However, the third respondent only listed family members in the household roster (sister, mother, niece) but then answered the cohabitation questions as if his girlfriend is living with him. He later indicated that she is a nanny and sometimes spends the night with him and sometimes at her workplace. Thus the respondent may have incorrectly answered Question 20b, since he had not listed her on the household roster as living in the household *(125135, CAPI, Spanish)*.

Only one respondent seemed to completely process what Question 20b (Is this person currently living with a boyfriend/girlfriend or partner in this household?) was asking, by explaining it was asking whether she is living with a partner or boyfriend *(125209, Paper, Spanish)*. The other two

respondents partially explained the concept behind the question, though neither gave any indication that they misunderstood its intent.

- One respondent said it was asking whether the person is in a relationship with someone but did not specify that they needed to be living together *(125135, CAPI, Spanish)*.

- One respondent said it was asking if she is married. *(225013 CAPI, Spanish)*.

The three respondents interpreted "boyfriend/girlfriend or partner" ("novia/novio") as:

- A person that lives with you *(125135, CAPI, Spanish)*.

- You are not married *(125209, Paper, Spanish)*.

- A formal and steady relationship *(225013, CAPI, Spanish)*.

Respondents were asked if their partner lives with them all the time or whether the person stays somewhere else part of the time. Two of the respondents stated that their partner has no other residence. The third, as mentioned above, stated that his partner sometimes sleeps at his home.

When asked what is meant by the term "registered domestic partnership or civil union" ("union reconocida") in item 20c, two respondents seemed to understand it correctly, while one thought it was asking about whether they had been married in a civil ceremony "casada por lo civil" *(225013, CAPI, Spanish)*.

Unmarried, Non-Cohabitating Respondents

Nine additional respondents, all of whom are currently not married, also answered and commented on this series of questions. Nearly all seemed to correctly understand that the question is asking if the person is currently living with a boyfriend/girlfriend or partner in this household. Interestingly, the one divorced respondent thought it was asking about his ex-wife, rather than him *(125143, Paper, Spanish)*.

Four of the nine respondents commented on the terminology "novo/novia o pareja" (boyfriend/girlfriend or partner). Two interpreted "novo/novia" as a relationship where the boyfriend and girlfriend are <u>not</u> living together, whereas "pareja" is where they <u>are</u> living together (one was from El Salvador, and the other from Mexico). The other two broadly described the terms as being in a relationship without being married.

Finally all six of the nine respondents who commented on the meaning of "civil union" misunderstood it. One respondent came close to a correct interpretation by saying it is when two people are married or in a same-sex relationship *(125084, Paper, Spanish)*. Three others interpreted the phrase as being legally married, and two described it as living with a partner.

5.4.3   Recommendations

With so few respondents to this series of questions, we do not have any recommendations for revision. We did not detect any significant problems among the three cohabiting respondents. Further testing on a larger scale is needed to confirm that data from these questions will be valid and reliable.

5.5   Journey to Work: Commuting Mode Question

5.5.1   Background

Statistics resulting from the commuting mode question are used by metropolitan planning organizations to design programs that ease traffic problems, reduce congestion, and promote carpooling. Public transit agencies also use the data to identify areas that need transit service, and police and fire departments use them to plan for emergency services in areas where many people work. For Round 1 testing, the rail categories were slightly rearranged to reflect growing transit ridership, which reached record numbers during 2012. The light rail category was also added because it represented the sharpest increase.

We tested one version of the commuting mode question in Round 1, which incorporated the revised rail categories. We found that generally respondents were marking one answer but did not always understand some of the terms used in the question categories. We recommended removing the term "trolley bus" and revising the commuter rail and work at home categories. The version of the question we tested in Round 2 incorporated all of these recommendations.

5.5.2   Overall Item Performance

The commuting mode question was tested with 19 English and 16 Spanish respondents in Round 2. The question did not apply to 4 respondents (1 English, 3 Spanish). Table 5-4 shows the number of respondents who had the characteristics that were targeted for this question in Round 2.

Table 5-4.   Number of respondents with targeted characteristics for the journey to work: commuting mode question by language and mode

		Total		Paper		CAPI	
		English	Spanish	English	Spanish	English	Spanish
Journey to work commuting mode	Rail commuters	7	3	3	2	4	1
	Multimode	7	6	3	2	4	4

Out of the 35 people (19 English, 16 Spanish; 18 CAPI, 17 Paper) who answered this question, 11 answered the question incorrectly (5 English, 6 Spanish). Eight respondents appear to have disregarded the instructions and answered with more than one category (3 English, 5 Spanish).

■   Four respondents were thinking of multiple modes they take in one trip (2 English, 2 Spanish).

■   Two respondents were selecting the different modes they take on different days of the week (1 English, 1 Spanish).

■   Two Spanish respondents did not explain why they selected multiple categories.

The other three respondents who answered the question incorrectly (2 English, 1 Spanish) provided only a single response, but in probing, it became evident that they had not selected the correct category.

■   One respondent had recently moved and answered about her new commute rather than her commute last week (*315071, CAPI, English*).

■   One respondent didn't see the "work from home" option so she selected "walked" instead (*515037, CAPI, English*).

■   One respondent selected "car" when she really "works from home." This respondent was thinking of times she uses her car to make purchases for her business (*225115, Paper, Spanish*).

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"Commuter Rail" Terminology Is Often Misunderstood

Among the 35 respondents, 7 answered with one of the rail categories (2 English, 5 Spanish). Four of these 7 respondents who selected a rail category for themselves seemed to select the appropriate category based on their descriptions (1 English, 3 Spanish). The other 3 all selected "commuter rail" inappropriately. Two of these respondents use the Metro in Washington, DC (subway), and 1 uses the Rapid in Cleveland (light rail).

While five additional respondents did not answer with a rail category as their main way of getting to work, they noted that they sometimes take the train so they commented on the rail categories as well. Four of these respondents were from Cleveland; all four had difficulty determining what category they would select for the Rapid, which is a light rail system. None of them said they would have selected "light rail." The fifth respondent, who sometimes takes the CTA in Chicago also noted she would have had difficulty deciding which category to use to describe that system, commenting that it could be described by all three of the choices (*225115, Paper, Spanish*).

Respondents Had No Difficulty Answering On Behalf of Other Household Members, Though "Commuter Rail" Continues to Cause Problems

Respondents had no difficulty recalling what mode of transportation their household members used, but three (1 English, 2 Spanish) did have a problem selecting the appropriate answer category for a household member who uses rail. All three respondents chose "commuter rail" to describe the DC Metro, BART, and CTA, including one respondent who had categorized the DC Metro as "subway" for herself, but as "commuter rail" for her sister *(125205, Paper, Spanish)*.

- One English language respondent explained she is not familiar enough with BART to know exactly what it is, but she chose commuter rail because she focused on the word commuter. Her sister gets a commuter check from her employer for taking public transportation *(515007, CAPI, English)*.

As well, two Spanish respondents disregarded the instruction to "mark only one" when answering on behalf of household members who use multiple modes of transportation.

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5.5.3 Recommendations

Reverse the order of the commuter/long distance rail category.

- There was a trend among Round 2 respondents to revert to the "commuter rail" category when they were unsure how to categorize the type of rail transit they or their household members take. Reversing the order in which the rail types in this category appear may help alleviate the issue.

Simplify the instructions to mark only one response category, or allow respondents to mark more than one.

- Eight of 35 respondents marked more than one category for their response. Simplifying them can better ensure respondents notice and correctly follow the instructions to mark only one answer.

- Consider allowing respondents to select more than one response.

5.6 Journey to Work: Time Left for Work Question

5.6.1 Background

Data from the time left for work item is used by transportation planners to help understand times of peak travel demand, provide transportation infrastructure to relieve congestion, and gauge potential ridership for transit investment projects. The current item that asks respondents what time they leave home for work is reported by the Census Bureau as one of the most contentious questions on the ACS, according to its customer service and field representatives and congressional testimony. It is also often cited in the media as one of the most intrusive questions on the form. In Round 1, we tested a question that asked respondents what time they arrived at work. Our findings revealed that respondents were estimating, rounding, reporting the time they are "supposed" to start rather than the time they actually arrive, and reporting the time they "clock in" or get to their desk as opposed to the time they stop commuting. These observations strongly suggested that the arrival time question would likely not provide as accurate a measurement of the use of transportation systems as perhaps the current time left for work question would. In hopes of reducing the sensitive nature of the current question, in Round 2 we tested a modified version that asks what time the person's "trip to work" began, rather than what time they left home.

5.6.2 Overall Item Performance

The question regarding time left for work was tested with 17 English and 14 Spanish language respondents in Round 2. Table 5-5 shows the number of respondents who had the characteristics that were targeted for the Time Left for Work question.

Table 5-5. Number of respondents with targeted characteristics for the journey to work: time left for work question by language and mode

		Total		Paper		CAPI	
		English	Spanish	English	Spanish	English	Spanish
Journey to work—time left for work	Make stops	5	6	2	1	3	5
	Travel for business	10	4	4	1	6	3
	Varying shift	7	10	6	5	1	5

Overall, this question worked as intended, even for those who make stops on the way to work, travel for business, or work varying shifts. Twenty-five out of 31 respondents correctly understood and answered the question. Of the 6 respondents who answered incorrectly, 1 English language respondent answered with a range (7:30 am to 8:00 am), since his leave time depends on what clients he is visiting that day (*315044, CAPI, English*). The other 5 respondents (3 English, 2 Spanish) misinterpreted what the question was asking.

- Three respondents answered with the time they arrive at work, rather than what time they leave for work.

- One respondent answered "8:00 am" because he thought the question was asking "what time do I start work" (*515007, CAPI, English*).

- Another English language respondent thought it was asking about how long it takes to get to work. This respondent answered "1:00" based on how long it takes him to get to work, but corrected his answer to "7:00 am" upon seeing the following question (*217255, Paper, English*).

5.6.3 Key Findings

Several Respondents Use a Rounding or Averaging Strategy To Answer

Eleven respondents (8 English, 3 Spanish; 8 Paper, 3 CAPI) indicated that they rounded when answering this question. Of the 8 respondents (6 English, 2 Spanish; 5 Paper, 3 CAPI) who gave details during probing about their rounding strategies, 2 rounded by only 5 minutes, 2 by 10 minutes, and 2 by 15 minutes. Of the other 2 respondents who provided sufficient detail for analysis, 1 rounded by 45 minutes and the second, who works varying shifts, said he leaves at 1:10 pm and indicated he both rounded his answer and reported an average leave time: "I just rounded around, like did an average. I usually leave at different times, but I just put an average time." Respondent usually leaves between 12:30 pm and 1:30 pm (*215003, Paper, English*).

Rounding or providing an average were common strategies for answering among those who travel for business and who work varying shifts. For example, of the 14 respondents who travel for business, 3 (all English; 1 Paper, 2 CAPI) reported sufficient detail for analysis, and all 3 noted that they estimated either by rounding or taking an average of the various times they leave for work. Of the 17 respondents whose schedules varied or whose jobs lacked a schedule, 6 provided enough detail about their answers to assess their strategies.

- Two of these 6 respondents (both English and Paper) reported the average time they leave.

- Three respondents (2 English, 1 Spanish; 3 Paper) reported rounding their answers.

- One respondent, whose work schedule and mode of commuting both vary, selected the time she "usually" leaves for work (*625036, Paper, Spanish*).

Respondents Do Not Find the Leave for Work Question To Be Intrusive

Most respondents had no problems being asked about what time they leave for work. Only one respondent found the question to be intrusive, but this person misunderstood the probe to be asking about where he was leaving from rather than what time he was leaving (*125135, CAPI, Spanish*). One respondent noted that she finds these questions "a little bit scary" but is ok with answering them since they are part of a study (*225012, CAPI, Spanish*).

Respondents Generally Had No Difficulty Answering On Behalf Of Other Household Members

Of the 24 respondents who answered this question on behalf of other household members, most reported that it was very easy to do so. Generally, people either travel with their household member to work, see them leave or are otherwise aware of their schedules. However, when household members' work schedules varied, respondents again had difficulty answering what time these individuals leave for work. Four respondents reported difficulty in this regard: two (English; 1 Paper, 1 CAPI) said the question was hard, but did not specify how they decided on their answer; one ended up answering about what time his wife left for work "yesterday" (*115034, CAPI, English*); and the fourth respondent answered about the time he hears his father moving around rather than what time he leaves (*215003, Paper, English*). One additional respondent reported not having difficulty answering, but provided a range in his answer of 6-6:30am (*315044, CAPI, English*).

5.6.4   Recommendations

We recommend proceeding with this question as worded for the field test.

- ■   While respondents used some rounding and estimation strategies to answer the question, most understood what the question was asking and did not report difficulties in coming up with their answer. None of the respondents who understood what the question was asking felt it was intrusive.

5.7   Weeks Worked Questions

5.7.1   Background

The purpose of the Weeks Worked question is to help produce an accurate picture of work experience. The statistics are used to develop policies and programs that promote employment and career development and training, as well as to measure compliance with antidiscrimination laws. Businesses use information on last year's work status to decide where to locate new plants or offices. These statistics are also used to plan employment programs for seniors under the Older Americans Act. The current question captures a categorical response; asking the question with an open-ended, and hence continuous, response option would allow Census Bureau users to create more precise earnings measures.

In Round 1, we tested a one-item version that asked how many weeks the person worked and a two-item version that asked first whether the person worked 50 or more weeks in the last 12 months. Both versions instructed respondents to include paid vacation, paid sick leave, and military service. Findings revealed that respondents tended to disregard the reference period and that those in certain kinds of situations such as part-time workers, those with multiple jobs or shift workers had great difficulty coming up with an accurate estimate of their weeks worked. Recommendations included adding a skip instruction to the "yes" option of the first question in the two-item version and clarifying the reference period with the phrase "since one year ago today." In Round 2, we tested the two-item version without a skip instruction, with expanded instructions for counting paid time off in the first item and with the emphasis switched from "did" to "weeks" in the second item.

5.7.2   Overall Item Performance

The questions regarding number of weeks worked in the past 12 months were tested with 20 English and 17 Spanish language respondents in Round 2. Table 5-6 shows the number of respondents who had the characteristic that was targeted for the Weeks Worked topic in Round 2 – inconsistent work in the past 12 months.

Table 5-6.   Number of respondents with targeted characteristics for the weeks worked questions by language and mode

		Total		Paper		CAPI	
		English	Spanish	English	Spanish	English	Spanish
Number of weeks worked	Inconsistent work in the last 12 months	9	8	5	4	4	4

By analyzing responses to the follow-up probes, we were able to determine whether answers to the weeks worked survey questions accurately reflected the actual number of weeks worked for 27 out of the 37 respondents (17 English and 10 Spanish; 13 CAPI and 14 Paper). Of those, 13 answered seemingly accurately and 14 did not. Seven respondents did not provide enough information in probing to determine if the answer was accurate, and 3 respondents did not provide any responses to probes about their answer.

Among the 13 who seemed to answer accurately, 8 were full-year workers, either working all 52 weeks, or 50 weeks with unpaid vacation time (7 English, 1 Spanish).

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There were a variety of reasons why the 14 respondents (6 English, 8 Spanish; 9 Paper, 5 CAPI) gave an inaccurate answer to the number of weeks worked.

- Seven respondents seemed to use a calculation strategy that did not result in a correct answer, mostly by thinking in terms of months and multiplying that number by 4 to get weeks. Three of these were Spanish language respondents who were convinced that there are 48 weeks in a year, so based their response on that assumption. One of these was an English respondent who extrapolated incorrectly, answering 14 weeks, but in probing said that he had been working from July 7 to November 7, which actually equates to 16 weeks. He also indicated that he chose to exclude a part-time job he had earlier in the year because it didn't pay very much *(215003, Paper, English)*.

- Two respondents acknowledged they had guessed – one was an English language respondent working in construction who was laid off in the winter months. He estimated he had worked 35 weeks but said it was probably a "low-ball" estimate *(217255, Paper, English)*.

- Two respondents were thinking about days per week rather than weeks per year. One of the respondents actually gave her answer in days (60) *(125084, Paper, Spanish)* and the other extrapolated days out to 40 weeks. It is not clear if she was counting partial weeks as weeks worked *(125209, Paper, Spanish)*.

- Two respondents gave completely different answers in probing than they did to the question, with little explanation. One respondent answered 50 weeks, but in probing said it was probably more like 40 weeks *(625024, CAPI, Spanish)*. The other answered 1 week, but in probing said it was more like 24 weeks and may have been answering about how much time she took off, rather than how much she worked *(625036, Paper, Spanish)*.

Neither the overall findings nor the key findings discussed below differed by mode or language.

5.7.3   Key Findings

Respondents Continue to Have Difficulty Understanding Timeframe of Past 12 Months (52 Weeks)

Regardless of whether they provided an accurate answer to the question, Round 2 respondents continued to have the same types of difficulties seen in Round 1 in understanding the intended

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timeframe for the question. Out of the 37 respondents who answered the weeks worked question, 19 said they were thinking about a timeframe other than the past 12 months (13 English, 6 Spanish).

■ Ten respondents were thinking about the 2014 calendar year, with six respondents thinking about the entire calendar year of January through December 2014, even though interviews took place in October and November (8 English, 2 Spanish).

■ Nine respondents were thinking about some other timeframe (5 English, 4 Spanish), such as the portion of the current calendar year that they had been working, or more than a 12-month period.

Among the 19 who were thinking about some other timeframe, 13 said their answer would have remained the same if they had been thinking about the correct timeframe, and 8 said they would have given a different answer if they had been thinking about the past 12 months (7 English, 1 Spanish).

Full-Year Workers Are Generally Noticing Instruction To Include Paid Time Off

Among the 16 respondents who said in Question 38a they worked 50 or more weeks in the past 12 months, 8 gave a correct response of either 52 weeks (6 respondents) or 50 weeks (2 respondents) (because vacation time is unpaid). Only 1 respondent missed the instruction to include paid time off, answering 50 weeks instead of 52 *(315042, Paper, English).*

Partial-Year Workers Demonstrate Cognitive Difficulty in Answering Weeks Worked

Among the 20 respondents who answered no to question 38a (working less than the full year), 17 had at least one form of cognitive difficulty answering how many weeks they worked (10 English, 7 Spanish; 10 Paper, 7 CAPI). There were multiples reasons for their difficulties.

■ Eleven respondents answered using the wrong reference period, as discussed earlier (8 English, 3 Spanish). The length of the recall period may be in part contributing to their issues.

■ Two respondents (both English) simply could not answer the question, having difficulties reporting their work history in weeks, even though one of them had worked almost the entire year.

■ Four respondents (3 English, 1 Spanish) realized later that the answer they had given was wrong. For example, one respondent failed to subtract weeks that he did not work, answering 51 weeks but changing his answer to 35 because he forgot that he does not work his construction job in the winter months. *(217255, Paper, English)*

■ Eight respondents (5 English, 3 Spanish) admitted to rounding their answer or purely guessing the answer. For example, one respondent who answered 20 weeks, realized she had used the wrong timeframe and had worked more weeks in the correct timeframe. She said it wouldn't change her answer if she had been thinking of the past 52 weeks because she had rounded her answer anyway. *(515020, Paper, English)*

■ Four respondents reported some other type of problem in answering the question. One reported how many days she worked (60), rather than weeks *(125084, Paper, Spanish)*. One decided to exclude all the weeks he worked at a part-time job because it was for so little pay *(215003, Paper, English)*.

Seven respondents who appear to be partial year workers answered yes to having worked 50 or more weeks. They all demonstrated some type of difficulty or error when answering the actual number of weeks worked, including three respondents (2 English, 1 Spanish) who erroneously answered 50+ weeks in item 38a when they had actually worked less than 50 weeks. The other four respondents each had idiosyncratic reasons for reporting 50+ weeks in question 38a but acknowledging the actual number of weeks they worked did not equate to a full year. For example, two Spanish respondents were convinced there are only 48 weeks in a year. One answered 52 weeks, saying the answer represented August 2013 to the present (more than one year) *(125205, Paper, Spanish)*.

Spanish Respondents Generally Understand "Tiempo Libre Pagado" (Paid Time Off)

Twelve Spanish language respondents were asked what they thought was meant by the term "tiempo libre pagado"(paid time off). Eight respondents correctly understood the concept, 2 appeared to be unfamiliar with the concept, and 2 misunderstood it as being paid to do something during your free time.

Respondents Show Some Difficulty Responding for Other Household Members

A total of 17 respondents provided information about the number of weeks worked in the past 12 months for other household members. While 12 respondents (6 English, 6 Spanish) said it was easy for them to answer the Weeks Worked question on behalf of others, 5 (4 English, 1 Spanish) said it

was difficult, that they were uncertain of their answer, or that they were unable to answer this for other household members. Respondents displayed similar difficulties answering for others as they did answering for themselves, including whether or not to include paid vacation time *(115036, Paper, English)*, accounting for partial weeks worked *(115034, CAPI, English)*, and counting for those who were not working for part of the year *(117014, Paper, English)*.

5.7.4   Recommendations

Clarify reference period by saying "Over the past 52 weeks, since 1 year ago today…"

- Similar to Round 1, in Round 2 there was a high degree of error and inaccuracy in reporting the number of weeks worked. There continues to be a problem of misunderstanding the desired timeframe for the question, with fully 19 out of 37 respondents misinterpreting the reference period as something other than the last 12 months, and 8 saying it would have changed their answer if they had used the correct timeframe.

Modify question 38a to ask if the person worked EVERY week rather than 50 or more weeks and skip those who answer "yes" past 38b.

- Seven out of the 16 respondents who said they had worked 50 or more weeks in the past 12 months had not actually worked the full year. This gate question is essentially asking if the person worked a full year, so the recommended approach removes the need to calculate weeks and instead asks if the person worked every week over the past 52 weeks.

To reduce reporting errors, repeat reference period in question 38b.

- Again noting that 19 out of 37 respondents misinterpreted the desired reporting period for the question, we recommend repeating the wording of "Over the past 52 weeks, since 1 year ago today" when asking for the number of weeks worked.

In 38b, move information about including weeks where even a few hours are worked from the question to the instruction.

- The addition of the reference period to 38b makes the question quite lengthy. Because we have added the instruction to include weeks worked "even for a few hours to the question wording in 38a, it seems safe to move that same information from the question wording to the instruction in 38b. Furthermore, including the reference period and the types of weeks to count (those in which only a few hours are worked; those for which the person took paid time off) in both questions may increase the chances that respondents pay attention to them, thus improving accuracy of reporting.

Detailed Findings for Group 3 Topics 6

The Group 3 protocols tested potential revisions to the class of worker items, industry and occupation items, and retirement income items.

6.1 Class of Worker Question

6.1.1 Background

Statistics from the class of workers question are used to analyze employment trends; create career development programs; and determine representation within employment categories in the enforcement of equal employment opportunity. Employers may also use information on industry, occupation, and class of worker to locate businesses near potential employees in specific fields. The Census Bureau has observed that respondents tend to be confused by the current Class of Worker (COW) question and several of the response categories, such as "unpaid family worker" and "active duty military status." We tested two versions in Round 1, one of which used subheadings and grouped the response categories into similar classes. There were also differences between the two versions in the wording of some response categories and the instructions. Findings revealed that respondents preferred the version with subheadings but that some still struggled with how to classify their type of employer. Further, some respondents who had more than one job didn't answer for the same job throughout the COW and industry/occupation series. The most significant change to this item for Round 2 testing was to make it part of a series that included the industry/occupation items. This, along with some revisions to the instructions, was intended to help focus respondents on their most recent job at which they worked the most hours in the past 5 years.

6.1.2 Overall Item Performance

The questions regarding Class of Worker were tested with 20 English language and 20 Spanish language respondents in Round 2. Table 6-1 shows the number of respondents with the characteristics that were targeted for the COW questions.

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Table 6-1. Number of respondents with targeted characteristics for the class of worker questions by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
Class of worker	Self-employed	6	2	2	2	1	0	3	0
	State or local government	4	NA	2	NA	1	NA	1	NA
	More than one job	2	2	2	1	0	1	0	0
	Unpaid family worker	0	0	0	0	0	0	0	0
	Active duty	2	NA	1	NA	1	NA	0	NA

The majority of respondents across mode and language answered this item accurately based on probing. Of the 39 respondents who were probed on their answer to the class of worker item, 30 answered accurately (15 English, 15 Spanish) and 9 answered inaccurately (5 English, 4 Spanish; 6 Paper, 2 CAPI, 1 CATI). There was no clear pattern tying the inaccurate answers together. Three of the 9 were state or local government employees (2 English, 1 Spanish), 3 were self-employed (2 English, 1 Spanish), 3 worked at for-profit companies (1 English, 2 Spanish). Five respondents picked a category that probing revealed to be inaccurate, 3 respondents picked two categories to represent one job, and 1 respondent who hasn't worked since March 2013 did not select anything because she did not see the instruction to include her last job in the past 5 years.

We also explored respondent reactions to formatting of this item, findings specific to certain populations that may be more likely to have difficulty classifying their type of employer (e.g., more than one job in the past week; didn't work in the past week), interpretation of certain phrases, and ease or difficulty answer for other household members.

- **Formatting.** Across both Paper and CAPI modes, respondents reported using the formatting to do a "process of elimination" as they searched for the category that best fit their employment situation. Of the 17 respondents who were probed on the formatting for the Paper mode, 14 explicitly said it helped them more quickly locate the category they were looking for. Of the 7 respondents who were probed on the formatting for the CAPI mode, 5 found it helpful and 2 did not. Two Paper respondents (1 English, 1 Spanish) answered with more than one category, but none of the CAPI respondents did.

- **More than one job.** Four respondents (2 English, 2 Spanish; 3 Paper, 1 CAPI) reported having more than one job in the past week, and all answered for the job at which they spent most of their time in the past week.

- **Not working.** Only two respondents (both Spanish language) reported not working in the past week. One had worked in the past 5 years and should have answered but didn't (*425032, Paper, Spanish*), and the other correctly skipped the question (*425033, CAPI, Spanish*).

- **Active duty.** Two respondents (both English language) selected "Active Duty." One is full-time active duty (*215768 Paper, English*), and the other is a reservist who is currently "on orders" and so wasn't doing his regular work as a self-employed odd jobber last week (*215770 Paper, English*).

- **Terminology.** Seven (6 English, 1 Spanish) of the 8 self-employed respondents were probed on whether their company was incorporated or non-incorporated, and only 2 (English) did not know. Seventeen respondents (7 English, 10 Spanish) worked for a for-profit, private sector organization of which 15 (6 English, 9 Spanish) were probed on the difference between for-profit and non-profit organizations. Most had a general understanding that for-profit organizations' goal is to make profit and non-profit organizations' goal is to help people in some way.

- **Other household members.** Seventeen respondents (11 English, 6 Spanish; 5 CATI, 6 CAPI, 6 Paper) answered for other household members. The majority of them found it easy to provide an answer. However, another 4 Spanish respondents (1 Paper, 3 CATI) were unable to answer at all for one or more other household members.

6.1.3   Recommendations

Retain the Round 2 wording for the Content Test.

- The revised class of worker item tested well, overall, in all three modes and both languages. Most respondents appeared to interpret the questions as intended, and there was no underlying pattern among the nine respondents who did not answer accurately.

6.2   Industry and Occupation Questions

6.2.1   Background

Data from the industry and occupation questions are used in combination with the COW question to analyze employment trends and produce statistics that guide government agencies' employment programs and employers' business decisions. The Census Bureau is concerned that the current list of

industries is antiquated and lengthy, resulting in respondent confusion, irritation, and increased burden. Moreover, providing examples at all may bias response. Some respondents may misunderstand the examples as the full set of possible responses, then leave the field entirely blank, believing that none of the examples apply.

We tested two versions of the industry and occupations questions in Round 1, one of which included examples while the other provided an instruction to "be as specific as possible" with no examples. There were also slight wording differences between the two versions of the industry question. Most respondents thought the examples were helpful and for some questions, such as duties, the examples seemed to elicit more detail and be more indicative of the level of detail required than was the phrase, "be as specific as possible." We also found that the wording of the title question was problematic for those with no official title, whose title is specific to their industry but not really descriptive of what they do, or whose title doesn't match their occupation. In Round 2, we tested the examples versions of the three questions, along with wording revisions in the title question (eliminating the word "title") and the duties question (asking respondents to "describe" their duties). We also recommended using two consistent examples in all three questions, one of which was for a blue-collar occupation.

6.2.2   Overall Performance of the Item Series

The questions regarding industry and occupation were tested with 20 English language and 18 Spanish language respondents in Round 2. Table 6-2 shows the number of respondents with the characteristics that were targeted for these questions.

Table 6-2.   Number of respondents with targeted characteristics for the industry and occupation questions by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
Industry and occupation	Protective service	4	NA	2	NA	1	NA	1	NA
	Manager	0	NA	0	NA	0	NA	0	NA
	Construction worker	0	3	0	1	0	1	0	1
	Day laborer	0	1	0	0	0	1	0	0

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Overall, this series of items asking for respondents' industry, occupation, and duties worked well. Most of the 38 respondents who answered appeared to interpret the items as intended and to provide answers that reflected their job situations.

6.2.3   Key Findings for Industry

A total of 36 respondents (20 English, 16 Spanish) answered the industry question along with probes about how they came up with those answers. Nearly all said this question was straightforward and reported no difficulties answering it. Only 3 of the 36 gave a response that we felt may potentially be difficult for the Census Bureau to classify—"Consultant" *(115047, CATI, English)*, "Other type of business" *(125076, CAPI, Spanish)*, and "Non-profit" *(725075, CAPI, Spanish)*. The two who refused to answer did so for idiosyncratic reasons: one insisted his job was a "compañia" (company) and not a "negocio" (business) or "industria" (industry) *(125031, CATI, Spanish)*; the other, a sheriff, felt the question was too sensitive to answer *(215013, Paper, English)*.

During probing, 16 of the 36 respondents (8 English, 8 Spanish; 4 Paper, 12 CAI) reported that the examples were useful, many elaborating that they helped them understand what the question was asking and guided them on how to select their answers. Thirteen respondents said they did not find the examples to be helpful (7 English, 6 Spanish; 7 Paper, 6 CAI). Most of these respondents reported that they didn't need to consult the examples because they already knew what their answers were. Just 4 respondents noted that the examples did not relate to their fields, but this did not appear to limit any of their responses.

Seventeen respondents (11 English, 6 Spanish) answered the industry question for other household members, with most reporting that it was easy to do so. Five additional respondents (all Spanish language; 1 Paper, 3 CATI, 1 CAPI) were unable to provide an answer at all and all 5 were attempting to report on household members who were not related to them. Only 3 respondents appeared to give a vague response for the other household member (2 of whom also gave vague responses for themselves): "City" *(215768, Paper, English)*, "Consultant" *(115047, CATI, English)*, "Other type of business" *(125076, CAPI, Spanish)*.

6.2.4   Key Findings for Occupation

Most of the 35 respondents who answered the occupation question (20 English, 15 Spanish) seemed to interpret the item as intended and provided an answer with what appeared to be sufficient level of detail, regardless of mode. Only 4 respondents' (1 English, 3 Spanish) answers may have been too vague.

- Two respondents (1 English, 1 Spanish) gave more than one response that may not have been pertaining to the same job. One self-employed respondent with multiple jobs answered "Writer/Tutor/Art Dealer." While he was thinking about the job that makes him the most money when he answered the industry item (sales), for his occupation, he decided to list "writer" first since that is what he spends the most time doing *(515027, Paper, English)*. The Spanish respondent answered "Journalism and Video Production" but did not clarify if these were separate jobs *(225104, Paper, Spanish)*.

- Two respondents who both work in construction gave vague responses. One respondent answered with his title "Principiante de diferentes trabajos" (beginner of different jobs) *(125069, CATI, Spanish)*, and the other answered "Do-All Maestro," explaining in probing that he is a stone mason maestro *(125070, Paper, Spanish)*.

While it's unclear from our findings whether the wording revision from "main occupation or title" to "main occupation" improved response accuracy, we note that 12 respondents reported that the answer they gave was actually their job title (8 English, 4 Spanish).

Of the 22 respondents who commented on whether the occupation examples were helpful, 12 (8 English, 4 Spanish) thought they were and 10 (9 English, 1 Spanish) thought they weren't. Of those who thought the examples were unhelpful, about half said it was because they didn't need the examples or the examples didn't apply to them. Two also noted that the examples didn't help them decide how much detail to give but two others—one a "freight broker" *(217270, Paper, English)* and the other a "program coordinator" *(515099, CAPI, English)*—commented that the examples did cause them to answer with a greater level of precision.

Seventeen respondents (11 English, 6 Spanish) were able to provide an answer for other household members, and of them, 14 (11 English, 3 Spanish) reported that it was easy to do so. The same 5 Spanish language respondents who were unable to provide any answer for non-related household members at 40c were also unable to answer at this item, saying that they did not know enough about these people to respond.

6.2.5   Key Findings for Job Duties

Of the 34 respondents (18 English, 16 Spanish) who answered the duties question, only 4 (3 English, 1 Spanish) provided minimal or vague responses that could potentially make it difficult for the Census Bureau to understand their roles. Two of these were respondents in the military who did not feel comfortable sharing more information about their duties. The other 2 responses were:

- Supervise employees (Police officer at a college) *(215005, Paper, English)*.

- Planning the work (Busboy in a restaurant) *(725023, CAPI, Spanish)*.

One other respondent (discussed below) gave a somewhat misleading answer, but beyond that we detected no other difficulties, even by job characteristics, including those who were self-employed or had multiple jobs.

For this question we also analyzed number of words per answer as one indicator of the level of detail provided. We found that CAI respondents used an average of 7.9 words to describe their duties, whereas Paper respondents used an average of 5.7 words. Furthermore, 10 of the 17 Paper respondents (7 English, 3 Spanish) used all the space provided and 4 specifically mentioned that the space dictated that they should not give as much detail as they might have otherwise provided.

Of the 26 respondents who provided feedback on the examples, 17 (10 English, 7 Spanish) felt the examples were helpful in coming up with their main activities or duties and 12 of those agreed that the examples helped them decide on the level of detail to provide. Nine respondents (7 English, 2 Spanish) felt the examples were not helpful, 5 of them because they know what their duties are and therefore did not need the examples. We note that the examples did limit the answer given by 1 respondent who works in construction.

- This respondent answered "montar e instalar tramos de tubería y revisar los planes de construcción para los detalles del trabajo" (mounting and installing stretches of pipes and reviewing construction plans for job details). After further probing, the respondent said he chose the example as an answer because he does a somewhat similar job as one of his activities, but also said that he though the examples were response categories and he had to choose one of them. Earlier, the respondent had said that he works in maintenance in a building, doing plumbing and electrical work and other needed duties related to maintenance *(725075, CAPI, Spanish)*.

Only 8 of 20 Spanish respondents answered probes about the wording of the construction example ("revisar los planes de construcción para los detalles del trabajo") and their answers were

inconclusive. Four seemed to be interpreting the example correctly and mentioned the construction industry or building houses. One was more specific and said it means, "You are reviewing the plans and ensuring they are met before moving onto the next phase of construction" *(125069, CATI, Spanish)*. No respondents mentioned that the wording was too long or wordy.

Fifteen respondents (10 English, 5 Spanish) were able to provide an answer for other household members, and of them, 10 (6 English, 4 Spanish) reported that it was easy to do so. The same 5 Spanish language respondents who were unable to provide any answer for other household members at 40c and 40e were also unable to answer at this item, saying that they don't know enough about them or their jobs.

6.2.6   Recommendations

Add a "closing" phrase ("or something else"/"etc.") to enhance verbal administration of the examples lists and to emphasize that the lists are not exhaustive.

- ■   To enhance verbal administration of the examples lists and to emphasize that the lists are not exhaustive, we recommend adding in a "closing" phrase. For consistency across items, we recommend adding the new phrase to all the industry and occupation items, even though difficulty with the examples only appeared in 40c and 40f. The phrase "or something else" will help the respondents understand that non-listed responses are welcome. In Spanish, the phrase "etc." is the best translation for extending the list of examples.

6.3   Retirement Income Questions

6.3.1   Background

The ACS income questions are used to help determine poverty levels, measure economic well-being, and gauge the need for economic assistance. State and local governments use this information to decide how to allocate funds for food, health care, and other assistance programs. The retirement income questions, specifically, were included in Round 1 testing because Federal surveys have lagged in addressing newer forms of retirement income, namely defined contribution plans (DC). Incomes from DC plans are now on par with income from defined benefit plans (DB). As such, the Census Bureau would like to inform respondents to include withdrawals and distributions from DC accounts.

In Round 1, we tested multiple versions of this question. In the CAI instruments, the question wording remained the same, but its placement in relation to the survivor/disability income questions differed. In the paper instruments, the question remained the same between versions, but the fine print instructions differed. Overall, we found that Round 1 respondents were mostly able to accurately report whether they had retirement income, but that some didn't count their pensions and their understanding of survivor income was mixed. In Round 2, we tested simplified question wording that incorporated the word "pensions" and revised instructions that streamlined the list of examples.

6.3.2 Overall Item Performance

The questions regarding retirement income were tested with 20 English language and 20 Spanish language respondents in Round 2. Table 6-3 shows the number of respondents with the characteristics that were targeted for the retirement income questions.

Across mode and language, the majority of respondents were able to accurately answer questions about whether or not they receive retirement, survivor, or disability income. In total, 35 respondents answered both the question and the probes (19 English, 16 Spanish). Thirty-four respondents were able to answer accurately, based on their responses to probing. Only 1 respondent *(125031, CATI, Spanish)* answered inaccurately based on probing, acknowledging that his retirement income was actually Social Security income, so he should have said no to retirement income.

Table 6-3. Number of respondents with targeted characteristics for the retirement questions by language and mode

		Total		Paper		CAPI		CATI	
		English	Spanish	English	Spanish	English	Spanish	English	Spanish
Retirement income	Retired with SIMPLE, Keogh, or SEP	1*	NA	0	NA	1	NA	0	NA
	Retirement income and still working	7	NA	2	NA	2	NA	3	NA
	Survivor income	2	NA	2	NA	0	NA	0	NA
	Workers (non-retirement age)/left job where contributed to retirement	4	NA	2	NA	1	NA	1	NA
	Any retirement income (SSI only, SSI and other, Other only)	NA	9	NA	5	NA	3	NA	1

* Respondent is also counted in the "retirement income and still working" category.

English language respondents who receive retirement income were familiar with most of the retirement income examples and were able to answer yes or no accurately even when they didn't see their own example in the list. For example, one respondent (*115090, CAPI, English*) reported for his SEP IRA although that type of account wasn't listed. Further, three respondents who receive pensions appreciated seeing that term in the question. However, two of the nine respondents receiving retirement income answered "yes" correctly to the retirement income question but acknowledged that they had excluded certain sources of income when tallying up their dollar amount.

- One respondent said she had already reported her pension income when asked about wages and salary, and was just thinking about income from retirement accounts like a 403(b) (*215008, CATI, English*).

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■ The other respondent realized that she had forgotten to include disbursements from her 457 account because it was not listed in the examples, though she did report other sources of retirement income *(515041, Paper, English).*

6.3.3 Key Findings

Retirees Understand Concept of "Regular Withdrawals"

Among the nine respondents who reported retirement income, all seemed to understand what was meant by "regular withdrawals." Two of these respondents thought that an emergency or early withdrawal from a retirement account would be counted as retirement income, but neither was thinking about that when answering the question.

Respondents With Survivor Income Answer Correctly

The two respondents with survivor income both received the Paper mode and reported that source of income accurately. Neither reported receiving non SSI or social security funded disability income.

Workers Who Have Rolled Over a Retirement Account Do Not Think of This as Income

Among the four English respondents who were recruited because they had left a job in the past year from which they had transferred a retirement account like a 401(k), none of them thought that moving retirement funds from one account to another would be considered income. One of these respondents said she wouldn't count it because she is not drawing anything from it, and at the end of the tax year she wouldn't get any statements that say she was given any money *(515032, CAPI, English).*

Spanish Respondents Are Split on Language Preference for Retirement Terms

Eleven Spanish respondents (3 CAPI, 3 CATI, 5 Paper) were probed on their preference for retirement terms "jubilación" or "retiro." Two preferred "jubilación," 4 had no preference, and 5 preferred "retiro." Seven respondents (2 CAPI, 2 CATI, 3 Paper) who answered retirement and/or

survivor income questions were probed on which term for survivor income they preferred, "pensión para viudos(as) y dependientes de fallecidos" o "sobreviviente." Three had no preference, one preferred "sobreviviente" and three preferred "pensión para viudos(as) y dependientes de fallecidos."

Respondents Show Some Difficulty Answering for Other Household Members

Across mode and language, 18 respondents answered for other household members and 12 of those respondents were probed on their answers. In general, respondents who were married or otherwise related to the person they were answering for were more likely to answer with ease than were respondents answering for a roommate or someone who wasn't otherwise related.

6.3.4   Recommendations

Retain the current item wording in both English and Spanish.

- Most respondents were able to answer easily and accurately about their retirement income and appeared to be interpreting the instructions and examples correctly.

- Spanish respondents' preferences for the terms probed on did not provide strong enough evidence to revise the Spanish wording.

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Appendix

Recruiting Results and Respondent Demographics

English Respondent Characteristics

FACILITY RID	Assigned Group	Assigned Mode	# of people 15+ in HH	Age	Gender	Level of education	Hispanic, Latino, or Spanish origin?	Race and Origin
115026	1	CATI	3	38	Female	College graduate	No	Asian
115037	1	Paper	3	59	Female	Graduate/ professional degree	Yes	White; Black or African American; American Indian/Alaskan Native; Asian
115067	1	CAPI	3	28	Male	High school diploma/GED	No	Black or African American
115093	1	CAPI	4	52	Female	High school diploma/GED	No	Black or African American
116046	1	Paper	3	42	Female	College graduate	No	Asian
117003	1	CATI	3	39	Male	Some college	No	Black or African American
117009	1	Paper	2	32	Female	Graduate/ professional degree	No	White; Middle Eastern
215004	1	CATI	4	37	Male	High school diploma/GED	Yes	No other race
215780	1	Paper	3	39	Female	Some college	No	Black or African American
215803	1	Paper	2	35	Female	Graduate/ professional degree	No	White; Black or African American
217259	1	CAPI	6	19	Female	High school diploma/GED	No	Middle Eastern
217267	1	CAPI	2	67	Male	Some college	No	White
217268	1	Paper	6	25	Male	Some college	No	Middle Eastern
315006	1	PAPER	4	48	Male	College graduate	No	White
315011	1	PAPER	2	45	Female	College graduate	No	Black or African American; American Indian/Alaskan Native
515010	1	CATI	2	39	Male	Some college	No	Black or African American; Asian; Other; Cherokee; Irish
515019	1	PAPER	2	49	Female	Graduate/ professional degree	Yes	Other; what do you mean? Indigenous and Black and Spanish
515024	1	PAPER	3	30	Male	High school diploma/GED	No	Black or African American
515074	1	CAPI	2	64	Female	Some college	Yes	Black or African American
515075	1	CATI	2	50	Female	College graduate	No	White; Other; Persian/Middle East
115006	2	PAPER	2	54	Female	Graduate/ professional degree	No	Black or African American
115024	2	CAPI	4	37	Female	College graduate	No	Black or African American
115034	2	CAPI	2	45	Male	College graduate	No	White
115036	2	Paper	3	26	Male	College graduate	No	White
116041	2	PAPER	2	46	Male	College graduate	No	Asian
117014	2	PAPER	2	34	Female	Some college	No	White; Black or African American
215003	2	Paper	6	25	Male	Some college	Yes	No other race
215009	2	CAPI	3	21	Female	Some college	No	Black or African American
217255	2	Paper	4	26	Male	Some college	Yes	No other race
315022	2	PAPER	2	51	Male	Some college	No	White
315028	2	CAPI	3	39	Male	Less than high school	No	White
315042	2	PAPER	2	40	Male	College graduate	No	Black or African American
315044	2	CAPI	2	54	Male	College graduate	Yes	White; Other; White and Hispanic
315071	2	CAPI	2	22	Female	Some college	No	Black or African American
515007	2	CAPI	2	65	Female	High school diploma/GED	Yes	Other; Hispanic
515014	2	CAPI	9	60	Female	College graduate	No	White
515020	2	PAPER	9	32	Female	College graduate	No	Black or African American
515037	2	CAPI	4	37	Female	Some college	Yes	No other race
515073	2	PAPER	2	53	Male	High school diploma/GED	No	Black or African American
515097	2	CAPI	2	44	Male	College graduate	No	White
115028	3	CATI	2	56	Female	College graduate	Yes	Black or African American
115047	3	CATI	3	71	Male	Graduate/ professional degree	No	White
115076	3	Paper	3	53	Female	College graduate	No	Black or African American
115090	3	CAPI	3	76	Male	College graduate	No	White
115096	3	Paper	4	42	Female	Some college	No	Black or African American
215005	3	Paper	3	36	Female	College graduate	No	Black or African American
215008	3	CATI	3	60	Female	College graduate	No	Black or African American
215013	3	Paper	2	66	Female	Some college	No	White
215768	3	Paper	2	31	Male	Some college	No	White
215770	3	CAPI	5	23	Male	Some college	No	White
215777	3	CATI	2	65	Male	College graduate	No	White
217270	3	Paper	2	56	Male	High school diploma/GED	No	White
217273	3	Paper	9	63	Female	Graduate/ professional degree	No	Black or African American
515027	3	PAPER	2	59	Male	Graduate/ professional degree	No	White
515032	3	CAPI	9	46	Female	Graduate/ professional degree	No	Black or African American
515040	3	CATI	2	29	Female	College graduate	No	Black or African American
515041	3	PAPER	2	64	Female	Graduate/ professional degree	No	Black or African American
515042	3	CAPI	4	21	Female	Some college	Yes	No other race
515047	3	PAPER	3	26	Male	College graduate	Yes	No other race
515099	3	CAPI	2	69	Female	Graduate/ professional degree	No	White

English Group 1 Characteristics

FACILITY RID	Assigned Group	Computer / Internet Use		Hispanic Origin / Race			
		Internet access via data plan only	Wifi only access	Afro-Latino	MENA	Multi-racial	Foreign born w/ children born in U.S.
Target		4-6	2-4	3-5	3-5	3-5	3-5
Completes		8	3	3	4	6	3
115026	1	1					1
115037	1			1		1	
115067	1	1					
115093	1	1					
116046	1						1
117003	1		1				
117009	1				1	1	1
215004	1	1					
215780	1	1					1
215803	1					1	
217259	1				1		
217267	1		1				
217268	1				1		1
315006	1	1					
315011	1	1				1	
515010	1					1	
515019	1			1			
515024	1	1					
515074	1	1		1			
515075	1		1		1	1	
115006	2						
115024	2						
115034	2						
115036	2						
116041	2						
117014	2					1	1
215003	2						
215009	2						
217255	2						
315022	2						
315028	2						
315042	2						
315044	2					1	
315071	2						
515007	2						
515014	2						
515020	2						
515037	2						
515073	2						
515097	2						
115028	3			1			
115047	3						
115076	3						
115090	3						
115096	3						
215005	3						
215008	3						
215013	3						
215768	3						
215770	3						
215777	3						
217270	3						
217273	3						
515027	3						
515032	3						
515040	3						
515041	3						
515042	3						
515047	3						
515099	3						

English Group 2 Characteristics

FACILITY RID	Assigned Group	Health Insurance			Journey to Work Commuting Mode		Journey to Work – Time Left for Work			Number of Weeks Worked
		Medicaid	State-based marketplace users (CA, MD, DC)	Insurance directly from insurance company (NOT employer based)	Rail Commuters	Multi-mode	Make Stops	Travel for business	Varying Shift	Inconsistent work in the last 12 months
Target		3-5	6-8	3-5	6-8	3-5	3-4	1-2	3-4	5-6
Completes		3	5	5	9	9	6	10	7	9
115026	1						1	1		
115037	1	1								1
115067	1	1								1
115093	1	1								1
116046	1									
117003	1									1
117009	1				1					
215004	1						1		1	1
215780	1						1	1	1	
215803	1						1			
217259	1									
217267	1								1	
217268	1						1	1		
315006	1									
315011	1	1								1
515010	1					1	1	1		
515019	1		1							
515024	1					1		1		
515074	1			1						
515075	1			1				1	1	
115006	2			1	1				1	
115024	2		1					1		
115034	2				1	1	1	1		
115036	2		1							1
116041	2				1	1	1	1		
117014	2		1			1			1	
215003	2			1					1	1
215009	2	1								1
217255	2								1	1
315022	2				1	1		1	1	1
315028	2				1	1		1		1
315042	2				1	1		1		
315044	2			1	1	1	1	1		
315071	2	1			1	1				1
515007	2			1						
515014	2		1							1
515020	2	1					1			1
515037	2			1	1	1	1	1		
515073	2							1	1	
515097	2		1				1	1	1	
115028	3			1			1			
115047	3			1					1	
115076	3							1		
115090	3								1	
115096	3	1			1	1	1	1		1
215005	3							1		
215008	3									
215013	3							1		
215768	3							1	1	1
215770	3						1		1	
215777	3									
217270	3									
217273	3									
515027	3	1						1	1	1
515032	3							1	1	
515040	3									
515041	3									
515042	3									
515047	3					1		1		
515099	3						1			

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English Group 3 Characteristics

FACILITY RID'	Assigned Group	Class of Worker					
		Self Employed	State/Local Govt. (protect. Service, teachers, state coll or univer.)	More than one job	Unpaid family workers	Active Duty-R	Active Duty-HH
Target		2-3	2-3	2-3		2-3	
Completes		7	3	5	2	2	0
115026	1						
115037	1	1			1		1
115067	1						1
115093	1						
116046	1	1					
117003	1						
117009	1		1				
215004	1						
215780	1	1		1			
215803	1						
217259	1						
217267	1	1		1			
217268	1						
315006	1						
315011	1						
515010	1						
515019	1						
515024	1						
515074	1						
515075	1	1		1			
115006	2	1		1			
115024	2						
115034	2		1		1		
115036	2						
116041	2						
117014	2						
215003	2						
215009	2						
217255	2						
315022	2			1			
315028	2	1		1			
315042	2	1		1			
315044	2	1					
315071	2						
515007	2						
515014	2						
515020	2						
515037	2						
515073	2			1			
515097	2	1					
115028	3	1					
115047	3	1					
115076	3	1					
115090	3	1					
115096	3						
215005	3		1				
215008	3						
215013	3		1				
215768	3			1		1	
215770	3					1	
215777	3	1		1			
217270	3				1		
217273	3						
515027	3	1		1			
515032	3		1				
515040	3			1	1		
515041	3						
515042	3						
515047	3	1		1			
515099	3						

English Group 3 Characteristics (continued)

FACILITY RID	Assigned Group	IO-22 Current occupation? Open-ended	Industry and Occupation				Retirement Income			
			Occupation: Protective Service	Occupation: Manager	Occupation: Construction worker	Occupation: Day laborer	Retired with SIMPLE, Keogh, or SEP	Retirement income & still working	Survivor income	Workers (non retirement age)/ left job where contributed to retirement
Target			1-2	1-2	1-2	1-2	2-3	2-3	2-3	2-3
Completes			3	1	0	0	2	6	4	4
115026	1	engineer			1					
115037	1	independent contractor								
115067	1									
115093	1									
116046	1	Importer								
117003	1									
117009	1	Engineer								
215004	1	Machine Operator								
215780	1	Home care aide supervisor								
215803	1	Teacher								
217259	1									
217267	1	Appraiser and real estate broker							1	
217268	1	Quality supervisor								
315006	1	Account executive for janitorial services company								
315011	1									
515010	1	I'm a maintenance lead		1						
515019	1									
515024	1	Book Store Clerk								1
515074	1									
515075	1	Event Planner/Food service								1
115006	2	writer								
115024	2	nanny								
115034	2	owner of private consulting company								
115036	2									
116041	2	IT ANALYST								1
117014	2	Retail								
215003	2	CNC Operator								
215009	2	Cashier								
217255	2	Utility locator			1					
315022	2	Nurse								
315028	2	Laborer				1				
315042	2	Administrative assistant								
315044	2	consultant for search engine optimization								
315071	2	Dental receptionist								
515007	2	Clerical at Nordstrom distribution center in Newark. Key in paperwork and invoices.								
515014	2									
515020	2	Customer Service Rep								
515037	2	manicurist								
515073	2	Delivery Driver at multiple jobs.								
515097	2	Academic editing and translations								1
115028	3	Activity coordinator						1		
115047	3	consultant						1		
115076	3	business development							1	
115090	3	editor					1	1		
115096	3	child care before and after school							1	1
215005	3	Police Officer	1							
215008	3						1			
215013	3	Deputy sheriff	1							
215768	3	Recruiter								
215770	3	Military								
215777	3	Investment consultant						1		
217270	3									
217273	3	Trust assistant						1	1	
515027	3	academic tutor/freelance writer-investment issues								
515032	3	Crime Scene Technician CSI	1							1
515040	3	supervisor								1
515041	3	Early Literacy Coach								1
515042	3	Vetrinarian Assistant							1	
515047	3	Search Engine Optimizer								
515099	3	Program Coordinator		1				1		

English Demographics

English Demographics	Totals	Group 1 Paper	Group 1 CAPI	Group 1 CATI	Group 2 Paper	Group 2 CAPI	Group 3 Paper	Group 3 CAPI	Group 3 CATI
Gender									
Male	27	4	2	3	7	4	3	2	2
Female	33	6	3	2	3	6	7	3	3
Education									
Less than High School	1					1			
High school or GED	8	1	3	1	1	1	1		
Some college	18	2	2	2	4	3	3	2	
College	22	3		2	4	5	3	1	4
Graduate/Professional Degree	11	4			1		3	2	1
Age									
18-29	12	1	2		3	2	1	2	1
30-39	15	4		4	2	3	2		
40-49	10	4			2	2	1	1	
50-64	16	1	2	1	3	2	5		2
65+	7		1			1	1	2	2
Race/Ethnicity									
Hispanic no other race	7			1	2	2	1	1	
Hispanic Black (Afro-Latinos)	3	1	1						1
Hispanic White	0								
Hispanic Other	0								
White	17	1	1		2	4	4	3	2
Black	20	2	2	1	4	3	5	1	2
MENA	4	2	1	1					
Asian	3	1		1	1				
Other	0								
Multiracial	6	3		1	1	1			
TOTAL	**60**	**10**	**5**	**5**	**10**	**10**	**10**	**5**	**5**

Spanish Respondent Characteristics

FACILITY RID	# of people 15+ in HH	Age	Assigned Group	Assigned Mode	English language level	Gender	Level of education	Hispanic, Latino, or Spanish origin?	Country of origin	Race (blanco, negro/afro-latino, asiatico, other)
125003	2	40	1	PAPER	Bien	Female	Graduado de Universidad	Yes	Mexico	Otro; Mixed
125014	4	46	1	CAPI	Nada	Female	Algunos estudios universitarios	Yes	Dominican Republic	Negro o Afro Latino
125019	4	59	1	PAPER	Nada	Female	Primaria pero menos de secundaria	Yes	Dominican Republic	Negro o Afro Latino
125024	4	62	1	PAPER	Nada bien o	Male	Primaria pero menos de secundaria	Yes	El Salvador (CA)	Blanco; Otro; Indigenous
125027	3	36	1	PAPER	Nada bien o	Female	Secundaria pero menos de estudios universitarios	Yes	Guatemala (CA)	No other race
125036	3	48	1	CATI	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	Panama (CA)	Otro; Mix
125081	6	55	1	PAPER	Nada bien o	Female	Graduado de Universidad	Yes	Venezuela (SA)	Blanco
125082	3	26	1	PAPER	Nada bien o	Female	Secundaria pero menos de estudios universitarios	Yes	Honduras (CA)	Negro o Afro Latino
126009	2	36	1	CAPI	Nada	Male	Primaria pero menos de secundaria	Yes	Mexico	Blanco
126010	3	45	1	CAPI	Nada bien o	Male	Primaria pero menos de secundaria	Yes	Peru (SA)	No other race
225001	2	34	1	CAPI	Nada bien o	Female	Primaria pero menos de secundaria	Yes	Mexico	Blanco
225102	4	39	1	PAPER	Nada bien o	Female	Primaria pero menos de secundaria	Yes	Mexico	Otro; morenita
225117	3	33	1	PAPER	Bien	Male	Algunos estudios universitarios	Yes	Mexico	Otro; moreno
425018	2	56	1	PAPER	Nada	Female	Algunos estudios universitarios	Yes	Cuba	Blanco
425022	2	64	1	CAPI	Nada bien o	Male	Algunos estudios universitarios	Yes	Cuba	Blanco
425046	3	28	1	CATI	Bien	Female	Algunos estudios universitarios	Yes	Puerto Rico	Blanco
625002	3	54	1	CATI	Nada bien o	Female	Primaria pero menos de secundaria	Yes	Mexico	No other race
625203	3	42	1	PAPER	Bien	Female	Secundaria pero menos de estudios universitarios	Yes	Mexico	Blanco
725019	5	18	1	CATI	Nada bien o	Female	Secundaria pero menos de estudios universitarios	Yes	Colombia (SA)	Negro o Afro Latino; Otro; Hispano
725020	4	35	1	PAPER	Nada	Female	Primaria pero menos de secundaria	Yes	Ecuador (SA)	Otro; trigueÃ±a;mulata
725021	3	27	1	CAPI	Nada bien o	Female	Primaria pero menos de secundaria	Yes	El Salvador (CA)	No other race
125035	4	42	2	PAPER	Nada bien o	Female	Secundaria pero menos de estudios universitarios	Yes	El Salvador (CA)	Blanco
125084	5	30	2	PAPER	Bien	Female	Graduado de Universidad	Yes	Other; estados unidos	No other race
125135	3	42	2	CAPI	Nada bien o	Male	OTHER; Technical school	Yes	Peru (SA)	Negro o Afro Latino
125141	3	47	2	CAPI	Nada	Female	Secundaria pero menos de estudios universitarios	Yes	Honduras (CA)	
125143	5	48	2	PAPER	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	Nicaragua (CA)	Blanco
125205	5	26	2	PAPER	Bien	Female	Graduado de Universidad	Yes	El Salvador (CA)	No other race
125209	3	34	2	PAPER	Bien	Female	Graduado de Universidad	Yes	El Salvador (CA)	No other race
127006	4	65	2	CAPI	Nada bien o	Female	Graduado de Universidad	Yes	Peru (SA)	No other race
225007	10	42	2	PAPER	Nada	Female	Algunos estudios universitarios	Yes	Ecuador (SA)	Blanco
225012	3	48	2	CAPI	Bien	Female	Secundaria pero menos de estudios universitarios	Yes	Mexico	Blanco
225013	3	36	2	CAPI	Nada	Female	Secundaria pero menos de estudios universitarios	Yes	Mexico	No other race
225115	2	38	2	PAPER	Bien	Female	Graduado de Universidad	Yes	Venezuela (SA)	Blanco
625024	3	50	2	CAPI	Nada bien o	Female	Primaria pero menos de secundaria	Yes	Mexico	Otro; morena clara
625036	2	57	2	PAPER	Nada bien o	Female	Secundaria pero menos de estudios universitarios	Yes	Mexico	Blanco
625201	2	42	2	CAPI	Nada bien o	Male	Primaria pero menos de secundaria	Yes	Mexico	No other race
725014	4	18	2	CAPI	Nada bien o	Female	Primaria pero menos de secundaria	Yes	Guatemala (CA)	Blanco
725015	4	46	2	PAPER	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	El Salvador (CA)	Asiático
725016	2	41	2	CAPI	Nada bien o	Female	Graduado de Universidad	Yes	Panama (CA)	Otro; mixed
725022	6	44	2	CAPI	Nada	Female	Primaria pero menos de secundaria	Yes	El Salvador (CA)	
125031	4	72	3	CATI	Nada	Male	Primaria pero menos de secundaria	Yes	Dominican Republic	Negro o Afro Latino
125069	3	23	3	CATI	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	Guatemala (CA)	No other race
125070	5	34	3	PAPER	Bien	Male	Secundaria pero menos de estudios universitarios	Yes	Mexico	Otro; mestizo
125076	8	42	3	CAPI	Nada bien o	Male	Algunos estudios universitarios	Yes	Guatemala (CA)	Blanco
126007	6	72	3	PAPER	Nada	Female	Primaria pero menos de secundaria	Yes	Colombia (SA)	Otro; triguena
126017	4	64	3	PAPER	Nada bien o	Male	Graduado de Universidad	Yes	Colombia (SA)	Otro; mestizo
225011	2	39	3	CATI	Nada	Female	Secundaria pero menos de estudios universitarios	Yes	Mexico	Blanco
225104	3	61	3	PAPER	Bien	Female	Algunos estudios universitarios	Yes	Venezuela (SA)	Blanco
225108	2	46	3	CATI	Nada	Female	Graduado de Universidad	Yes	Mexico	No other race
425024	4	63	3	PAPER	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	Cuba	Blanco
425032	2	85	3	PAPER	Nada	Female	Secundaria pero menos de estudios universitarios	Yes	Panama (CA)	Blanco
425033	9	71	3	CAPI	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	Cuba	No other race
425036	9	66	3	PAPER	Nada bien o	Female	Graduado de Universidad	Yes	Cuba	Blanco
425059	3	64	3	CATI	Nada bien o	Female	Secundaria pero menos de estudios universitarios	Yes	Colombia (SA)	No other race
625037	2	46	3	PAPER	Nada bien o	Female	Algunos estudios universitarios	Yes	Mexico	Blanco
625205	2	72	3	PAPER	Bien	Male	Graduado de Universidad	Yes	Mexico	Blanco
725018	2	53	3	PAPER	Bien	Female	Graduado de Universidad	Yes	Puerto Rico	Otro; mestizo
725023	2	43	3	CAPI	Nada bien o	Male	Secundaria pero menos de estudios universitarios	Yes	Peru (SA)	Negro o Afro Latino
725024	2	42	3	CAPI	Bien	Female	Graduado de Universidad	Yes	Puerto Rico	No other race
725075	2	72	3	CAPI	Nada bien o	Male	Primaria pero menos de secundaria	Yes	Puerto Rico	Blanco

Spanish Group 1 Characteristics

FACILITY RID	Assigned Group	Computer / Internet Use		Hispanic Origin / Race		
		Internet access via data plan only	Wifi only access	Afro-Latino	Multiracial* (relaxed language requirement)	Foreign born w/ children born in U.S.
Target				4-6		4-6
Completes		7	3	4	14	11
125003	1				1	1
125014	1	1		1		
125019	1	1		1		1
125024	1				1	1
125027	1	1				1
125036	1				1	1
125081	1		1		1	
125082	1			1		1
126009	1	1			1	1
126010	1		1			
225001	1	1			1	1
225102	1	1			1	1
225117	1				1	1
425018	1				1	
425022	1				1	
425046	1	1	1		1	
625002	1	1				
625203	1				1	1
725019	1			1	1	
725020	1				1	1
725021	1					1
125035	2				1	1
125084	2					
125135	2			1		
125141	2					1
125143	2		1		1	
125205	2					
125209	2					1
127006	2					
225007	2				1	1
225012	2				1	1
225013	2					
225115	2				1	1
625024	2				1	1
625036	2	1			1	
625201	2	1				
725014	2	1			1	
725015	2				1	
725016	2				1	1
725022	2					1
125031	3					
125069	3					
125070	3				1	
125076	3				1	
126007	3				1	
126017	3				1	
225011	3				1	1
225104	3				1	
225108	3					1
425024	3				1	
425032	3				1	
425033	3					
425036	3				1	
425059	3					
625037	3				1	
625205	3				1	
725018	3				1	
725023	3			1		
725024	3					
725075	3				1	1

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Spanish Group 2 Characteristics

FACILITY RID	Assigned Group	Health Insurance			Cohabitation / Domestic Partnership	Journey to Work Commuting Mode		Journey to Work – Time Left for Work			Number of Weeks Worked
		Medicaid	State-based marketplace users* (CA, MD, DC) (relaxed language requirement)	Insurance directly from insurance company (NOT employer based) (relaxed language requirement)	Unmarried couples (same or opposite sex)	Rail Commuters	Multi-mode	Make Stops	Travel for business	Varying Shift	Inconsistent work in the last 12 months
Target					4-6						
Completes		5	4	1	3	3	8	8	4	10	8
125003	1									1	
125014	1										1
125019	1					1	1	1		1	
125024	1	1									
125027	1	1									1
125036	1								1	1	1
125081	1										
125082	1							1			1
126009	1										1
126010	1										1
225001	1							1	1	1	
225102	1									1	
225117	1				1		1			1	
425018	1										1
425022	1										
425046	1						1	1	1	1	
625002	1										
625203	1							1	1		
725019	1										
725020	1						1	1		1	1
725021	1				1		1	1	1	1	
125035	2	1						1		1	
125084	2		1								1
125135	2				1			1	1		1
125141	2		1								
125143	2		1								1
125205	2			1		1					
125209	2				1					1	
127006	2					1	1	1		1	1
225007	2										1
225012	2	1						1			1
225013	2				1		1	1	1		
225115	2								1	1	
625024	2	1					1	1		1	
625036	2		1				1			1	1
625201	2						1			1	1
725014	2	1						1		1	
725015	2					1	1			1	
725016	2						1	1	1		
725022	2	1					1			1	
125031	3									1	
125069	3										1
125070	3							1	1		1
125076	3										
126007	3	1								1	
126017	3								1	1	
225011	3							1		1	
225104	3								1		
225108	3					1	1	1	1		
425024	3	1								1	
425032	3										1
425033	3										
425036	3	1									1
425059	3									1	
625037	3									1	
625205	3	1									
725018	3					1					
725023	3	1									1
725024	3					1	1				
725075	3									1	

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Spanish Group 3 Characteristics

FACILITY RID	Assigned Group	Class of Worker			Industry and Occupation			Retirement Income
		Self Employed	More than one job	Unpaid family workers	IO-22 Current occupation? Open-ended	Occupation: Construction worker	Occupation: Day laborer	Any retirement income (SSI only, SSI and other, Other only)
Target						2-3	2-3	
Completes		5	3	0		3	2	10
125003	1				Limpieza		1	
125014	1							
125019	1				Cosmetologist			1
125024	1				House Keeping			
125027	1							
125036	1	1			Driver			
125081	1							
125082	1				Cook			
126009	1							
126010	1							1
225001	1	1	1		LIMPIEZA			
225102	1				preparando sandwich			
225117	1				restaurant			
425018	1							
425022	1							1
425046	1	1			cleaning			
625002	1							
625203	1				recepcionista			
725019	1							
725020	1				office cleaner			
725021	1	1		1	cleaning/selling herbalife			
125035	2				Cook			
125084	2							
125135	2		1		Painter		1	
125141	2	1	1		Cleaning houses		1	
125143	2							
125205	2				assistente de maestra de espanol			
125209	2	1			LIMPIEZA DE CASAS			
127006	2	1						
225007	2							
225012	2				babysitter			
225013	2	1			babysittet			
225115	2	1		1	arquilar propiedades/ cuarto para guespere			
625024	2				amade casa/ limpieza civer cafe			
625036	2				Limpieza de casa			
625201	2				cosinero			
725014	2				Waitress			
725015	2				factory assistant			
725016	2				Care Manager			
725022	2				limpieza de oficina			
125031	3	1			Cleaning			1
125069	3				remodelacion	1		
125070	3				construction worker	1		
125076	3	1			Mover and day laborer		1	
126007	3	1			house wife		1	1
126017	3	1			truck driver			
225011	3		1		fabrica inpreda/ limpieza			
225104	3	1	1		New reporter			
225108	3				Customer Service			
425024	3				mantenimiento			1
425032	3							1
425033	3							1
425036	3							1
425059	3							1
625037	3		1		Cashier			
625205	3							1
725018	3				secretaria			
725023	3							1
725024	3				directora de programas de servicio comunitario			
725075	3				handyman			1

Spanish Demographics

Spanish Demographics	Totals	Group 1 Paper	Group 1 CAPI	Group 1 CATI	Group 2 Paper	Group 2 CAPI	Group 3 Paper	Group 3 CAPI	Group 3 CATI
Gender									
Male	20	2	3	1	2	2	4	4	2
Female	40	9	3	3	7	8	6	1	3
Education									
Less than Secondary	17	4	4	1		5	1	1	1
Secondary	19	3		2	4	2	3	2	3
Some University	10	2	2	1	1	1	2	1	
University Graduate	14	2			4	2	4	1	1
Age									
18-29	7	1	1	2	1	1			1
30-39	12	4	2		3	1	1		1
40-49	20	2	2	1	4	6	1	3	1
50-64	13	4	1	1	1	1	4		1
65+	8					1	4	2	1
Hispanic Country of Origin									
South American	13	2	1	1	2	2	3	1	1
Puerto Rican/Cuban	9	1	1	1			3	3	
Central American	17	3	1	1	5	4	1	1	1
Mexican	17	4	2	1	1	4	3		2
Other	4	1	1		1				1
TOTAL	**60**	**11**	**6**	**4**	**9**	**10**	**10**	**5**	**5**