



# **Income Statistics Division**

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## **Note to Former Users of Data from the Family Expenditure Survey**

Prepared by:  
Expenditure Surveys Section

July 2000



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Income Statistics Division

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## **INTRODUCTION**

Until 1996, the Family Expenditure (FAMEX) Survey was held on a periodic basis, generally every four years. Beginning with the 1997 reference year, a new annual survey, the Survey of Household Spending (SHS), was conducted. This survey, which includes much of the content of the Family Expenditure Survey, also integrates content from the Household Facilities and Equipment (HFE) Survey.

## **SAMPLE SIZE**

The 1997 Survey of Household Spending has a sample size approximately 50% larger than that of the FAMEX Survey. In 1997, the number of eligible households sampled was 23,842 compared to only 14,765 for the 1996 FAMEX Survey.

## **NUMBER OF QUESTIONS**

The number of questions about household spending in the new survey is considerably lower than in previous FAMEX surveys, with the result that, for some expenditure categories, less detailed information is presented. Since the level of detail collected by the former FAMEX survey is not required on an annual basis, content was reduced to lower costs and make the survey easier and less time-consuming for the respondent. Table 1 compares the number of questions in the 1996 FAMEX questionnaire with the number of questions in the 1997 SHS. However, microdata users will not notice a significant reduction in content since previous microdata files from FAMEX included only a sub-set of the spending variables collected.

## **COVERAGE**

The Survey of Household Spending is designed to provide provincial estimates of approximately equal quality. Sample sizes for many provinces were increased – especially in the smaller provinces.

The SHS is providing more coverage in the North – it now covers the Yukon and the Northwest Territories (not just Whitehorse and Yellowknife). For 1997, Yukon estimates were designed to represent approximately 77% of the households in the territory, and NWT estimates approximately 74%. Coverage improved for the 1998 reference year and tabulated data for the new territory of Nunavut is available separately.

Due to the integration of the two surveys (HFE and FAMEX), it is possible to cross-classify spending data with data for dwelling characteristics and household equipment.

## **INTEREST AND PRINCIPAL NO LONGER COLLECTED SEPARATELY**

It is no longer possible to divide mortgage and loan payments into principal and interest. Respondents are still asked about payments on loans and mortgages (for principal dwellings, cottages, and other properties) but are not asked the extra questions that allowed the calculation of the principal/interest split. This affects the following variables:

- “shelter” (including “principal accommodation” and “owned living quarters”);
- “miscellaneous” expenditures;
- “money flows – assets, loans and other debts” (formerly net change in assets and liabilities).

Since “shelter” and “miscellaneous” are components of “total current consumption” and “total expenditure”, they are also affected.

**Shelter** Prior to 1997, interest payments for mortgages and loans on owned living quarters and owned vacation homes were included in shelter expenses. Starting in 1997, “regular mortgage payments” for owned living quarters, including both principal and interest, are included under shelter. Previously, mortgage principal was not included as a shelter expenditure but was part of “net changes in assets and debts”. To summarize, starting in 1997, the category “shelter”:

- includes “regular mortgage payments” on “owned living quarters” (both principal and interest);
- excludes the interest portion of irregular and/or lump sum payments and money borrowed on owned living quarters in the reference year. This would have been part of mortgage interest on owned living quarters in 1996 and earlier;
- excludes mortgage interest for owned vacation homes.

**Money flows – assets, loans, and other debts** (formerly “net change in assets and liabilities”)

- includes interest and principal for payments on mortgages for vacation homes or other property (formerly only principal was included)
- includes interest and principal for loan payments (formerly only principal was included)
- excludes “regular mortgage payments” (principal and interest) on “owned living quarters” (formerly principal was included, while the interest went to Shelter)
- includes “irregular and/or lump sum payments” and “money borrowed on owned living quarters in the reference year (formerly the principal from these payments was included, while the interest went to Shelter)

## OTHER CONCEPTUAL CHANGES

**Clothing** Fewer questions are asked about clothing in the SHS. However, the following new categories have been added:

- Clothing gifts to non-household members: women’s and girl’s (4 and over);
- Clothing gifts to non-household members: men’s and boy’s (4 and over);
- Clothing gifts to non-household members: children’s wear (under 4).

**Gifts of money and contributions (to non-household members)** Prior to 1997, non-money gifts to people outside the household were collected separately and included in “gifts, money and contributions to persons outside the household”, but as of 1997 they are included in the appropriate spending category. Gifts of clothing to individuals outside the household are included in the total expenditure on clothing but are also available separately.

## MINOR CHANGES

- “Rental of heating equipment” has moved from “water, fuel and electricity” (under “shelter”) back to “household furnishings and equipment”
- “Complete re-roofing” has been removed from “shelter” and is now included in “money flows” (investments in the home - new installations)



**TABLE 1 NUMBER OF SURVEY QUESTIONS, 1996 FAMEX AND 1997 SHS**

| 1996 Section Name                           | Number of questions |            | Net Change  |
|---|---------------------|------------|-------------|
|   | 1996 FAMEX          | 1997 SHS   |             |
| A01, A02 – Household Composition            | 20                  | 12         | -8          |
| B01 – Dwelling Occupied                     | 8                   | 28         | +20         |
| B02 – Dwelling Previously Occupied          | 13                  | 10         | -3          |
| C01 – Owned Living Quarters                 | 10                  | 10         | 0           |
| C02 – Purchase/Sale of a Home               | 13                  | 9          | -4          |
| C03, C04 – Mortgage                         | 34                  | 10         | -24         |
| C05, C06 – Renovations and Repairs          | 25                  | 3          | -22         |
| C07 – Rented Accommodation                  | 13                  | 13         | 0           |
| C08 – Water, Fuel, Electricity              | 13                  | 7          | -6          |
| C09 – Other Secondary Living Quarters       | 26                  | 24         | -2          |
| D01–D05 – Household Furnishings & Equipment | 71                  | 43         | -28         |
| E01 – Communications, etc.                  | 24                  | 18         | -6          |
| E02 – Cleaning Services, etc.               | 19                  | 6          | -13         |
| F01 – Food                                  | 21                  | 13         | -8          |
| G01 – Clothing for Women                    | 28                  | 4          | -24         |
| G02 – Clothing for Men                      | 21                  | 4          | -17         |
| G03 – Clothing for Children                 | 27                  | 10         | -17         |
| H01 – Personal Care                         | 9                   | 4          | -5          |
| I01 – Medical and Health Care               | 19                  | 15         | -4          |
| J01 – Automobiles and Trucks                | 12                  | 10         | -2          |
| J02 – Automobile and Truck Operation        | 19                  | 12         | -7          |
| J03 – Miscellaneous Vehicle Expenses        | 19                  | 17         | -2          |
| J04 – Transportation Services               | 11                  | 9          | -2          |
| K01 – Recreation Equipment                  | 26                  | 14         | -12         |
| K02 – Recreation Services                   | 36                  | 22         | -14         |
| L01 – Tobacco and Miscellaneous             | 14                  | 29         | +15         |
| M01 – Personal Income                       | 26                  | 18         | -8          |
| N01 – Personal Taxes/Security/Gifts         | 15                  | 14         | -1          |
| O01 – Change in Assets                      | 19                  | 18         | -1          |
| O02 – Loans and Other Debts                 | 30                  | 19         | -11         |
| <b>TOTAL</b>                                | <b>641</b>          | <b>425</b> | <b>-216</b> |