



Income Statistics Division

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Note to Former Users of Data from the Household Facilities and Equipment Survey

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Expenditure Surveys Section

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Statistics Canada
Income Statistics Division

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INTRODUCTION

In 1997, the Household Facilities and Equipment (HFE) Survey merged with the Family Expenditure Survey (FAMEX) to create the new Survey of Household Spending. This new survey has maintained much of the content of the Family Expenditure Survey while integrating material from the Household Facilities and Equipment Survey, which was conducted for the last time in May 1997.

The merging of the two surveys allows facilities and equipment data to be analysed in the context of household spending. Housing characteristics such as the type of heating fuel used and the presence of equipment such as computers and cellular phones can now be studied along with household spending on these items.

SURVEY DIFFERENCES

Sample size

The sample size of the 1997 SHS is around 30% smaller than that of the HFE survey (23,842 vs 34,737 eligible households). However, for certain provinces (Newfoundland, Nova Scotia, New Brunswick, Alberta, and British Columbia), the sample is approximately the same or larger. Unlike the HFE survey, the SHS collects data for the Yukon and the NWT (including Nunavut) and, beginning in 1998, Nunavut separately.

Weighting

To increase the reliability of survey estimates, weights are adjusted to ensure that estimates on relevant demographic characteristics respect population counts from sources other than the surveys. Population counts derived from post-censal estimations by Statistics Canada's Demography Division were used in both the SHS and the former HFE weighting although the characteristics employed, like age groups, were different in the two surveys. Furthermore, the SHS also uses counts of one-person and multi-person households for weighting purposes. This difference should be taken into account when comparing estimates of the number of households produced by each survey.

Collection method and reference period

Data from the SHS are collected via a personal interview conducted during the first three months following the reference year. Data on household spending refer to the previous calendar year. Information about facilities and equipment is as of December 31st of the reference year.

In contrast, respondents to the former HFE survey were asked about their dwellings and household equipment at the time of the interview in May of the reference year. Interviews were conducted by telephone as a supplement to the Labour Force Survey.

This difference in collection strategies (including different reference periods and collection dates) has resulted in a one-time irregularity in the frequency for which household facilities and equipment data are available. For the transition year (1997) there are two sets of household facilities and equipment data – one based on the 1997 HFE survey (referenced to May 1997) and the other based on the 1997 SHS (referenced to December 31, 1997).

Household (full-year and part-year)

Because the reference period used for collecting the expenditure data in the SHS is the calendar year, and because persons may join or leave a household during the year, the SHS concept of full-year and part-year members and households is necessary. A full-year household has at least one full-year member. A part-year household is composed entirely of part-year members.

In the SHS, expenditure data are tabulated based on full-year households only. Data for the facilities and equipment variables are tabulated based on full-year and part-year households to match more closely the universe from the former HFE survey. For the 1997 SHS, expenditure data were published based on 16,583 full-year households. Facilities and equipment data were published based on 17,129 full-year and part-year households.

Household size

Household size in the former HFE survey is based on the number of persons present at the time-of-interview. In the SHS, average household size is based on the number of year-equivalent persons. The number of year-equivalent persons is calculated by dividing the number of weeks that members were part of the household by fifty-two. In this way, part-year members are counted as fractions of a year-equivalent person. The survey database includes the variable, "Household size (Dec. 31)" for those users who prefer to classify facilities and equipment data in a manner similar to the HFE survey.

Reference person / household head

The reference person for the SHS is selected using the following method:

The household member being interviewed chooses which household member should be listed as the reference person based on the following definition: "The household reference person is the member of the household mainly responsible for its financial maintenance (i.e., pays the rent, mortgage, property taxes, electricity, etc.). This person can be either male or female. When all members of the household share equally, any member may be shown as the reference person." This person must have been a member of the household on December 31 of the reference year.

For the HFE survey, the concept of household head was used. The household head was defined as follows:

- In one-person households, the head is the individual himself/herself.
- In single-family households, the family head becomes the head of household.
- In multi-unit households, the head of the primary economic family¹ unit² becomes the head of the household.

The family head was determined as follows:

- In families consisting of married couples with or without children, the husband is considered the head.
- In single-parent families with unmarried children, the parent is the head.
- In single-parent families with married children, the member who is mainly responsible for the maintenance of the family becomes the head.

¹ An economic family is a group of individuals related by blood, marriage (including common-law relationships) or adoption.

² The primary economic family unit refers to the economic family that is listed first.

- In families where relationships are other than husband-wife or parent-child, normally the eldest in the family is considered the head.

Classifying variables

Income

The former HFE survey classified data using the income data from the Survey of Consumer Finances (SCF) whose sample overlapped that of the HFE survey. The income data from the SCF were always for the calendar year before the HFE survey. So data from the May 1997 HFE survey was classified using 1996 income from the SCF.

For the SHS, household income for members 15 years of age or over is collected for the reference year. This information is used to classify both the expenditure and the facilities and equipment data. So facilities and equipment data from the SHS can be classified using income data from the same survey for the same year.

Household type

Comparing household type categories from the HFE survey and the SHS is difficult. Differences are due mainly to the use of the economic family concept by the HFE survey and not by the SHS. (See Table 1.)

Housing tenure

Housing tenure for the HFE survey was based on a household's status at the time of the survey. Data could be classified into two groups: Owners (with or without a mortgage) and Renters.

The SHS system is based on a household's status throughout the reference year:

- Owners (all year)
 - With mortgage (at December 31)
 - Without mortgage (at December 31)
- Renters (all year)
- Mixed tenure (both owned and rented during the reference year)

There are two housing tenure variables on the survey database : "dwelling tenure during reference year" and "dwelling tenure at December 31."

TABLE 1 COMPARISON OF THE STANDARD HOUSEHOLD TYPE CLASSIFICATION FOR THE HOUSEHOLD FACILITIES AND EQUIPMENT SURVEY AND THE SURVEY OF HOUSEHOLD SPENDING

Household Facilities and Equipment Survey

One-person households

Age – under 65 years

Age – 65 years and over

Single-family households, total

No single children under 18 years

Married couples living alone

Other families without children

With single children under 18 years

Single-parent families, no relatives other than children under 18 years

All other families with children

Multi-unit households

Notes for HFE household type:

1. A single-family household: The entire household is comprised of a single economic family which is a group of individuals related by blood, marriage (including common-law relationships) or adoption; there are no unrelated individuals living in that dwelling.
2. A multi-unit household: Any household formed by two or more unrelated persons, by two or more economic families or any combination of families and unattached individuals.

Survey of Household Spending

One-person households

Person aged 65 and over

Husband-wife households

Both aged 65 and over

Without additional persons, without children

Without additional persons, with children

With additional persons

Lone-parent households

Female-headed

Other households

All persons related

At least one person unrelated

Notes for SHS household type:

1. Husband-wife households include those headed by both married and common-law couples.
2. "Additional persons" includes both related and unrelated persons.
3. Children can be any age as long as they are single (never married). Foster children are included.
4. Lone-parent households consist of a parent and one or more single, never-married children.
5. "Related persons" includes children who are no longer single, never-married and other relatives by birth or marriage.
6. Unrelated persons are household members who are not related to the reference person (e.g., lodgers and room-mates).