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REPORT ON FAMILY LIVING STUDIES

(Memorandum prepared by the International Labour Office)

Part I. Introduction

1. This report deals with the activities of the International Labour Office in the field of family living studies. Part I discusses the work in general terms and thus provides the context for the description of individual projects in Part II. Part III of the report treats certain aspects of terminology.
2. The ILO has long carried the main responsibility among international agencies for work on family living studies and, for a variety of reasons, these studies have been concerned primarily with household income and expenditure. This activity will continue, both in terms of field projects and in the supporting documentary work. But recent developments have focussed attention also on family living studies in a wider sense. International discussions, in particular, have brought to the fore the importance of studying and measuring levels and standards of living, and in this task family living studies play a crucial role. The Committee on International Definition and Measurement of Standards and Levels of Living laid great stress on the need for "direct and comprehensive" measurement of levels of living through family surveys. The ILO Working Group of Experts on Family Living Studies, which met in 1955, also underlined the importance of broad family living studies in measuring levels of living, as did the Statistical Commission in its last report.
3. It is worth noting, however, that the value of broad family living studies is not as yet appreciated everywhere. Many countries prefer to devote their available resources to improving the basic tools of economic statistics rather than to collecting data on social conditions. There is also sometimes a

preference for strengthening administrative channels for collecting statistics, as against embarking on relatively expensive household surveys. And even where household surveys are favoured priority may be given to specialist inquiries on, for example, unemployment, health or nutrition, rather than to multi-purpose studies. In short, the demand for broad family living studies is not yet as widespread as might be wished. In consequence, the ILO has experienced some difficulty in concluding arrangements with governments for practical tests of the methods to be used and demonstration of the results to be obtained. Field offices of the ILO have for some time been suggesting the possibility of technical assistance in this field, but have rarely encountered sufficient interest to counterbalance the practical problems involved. Similarly, a proposal put to the Conference of European Statisticians in 1955, which envisaged a co-ordinated programme of pilot surveys designed to test methods of measuring levels of living in a number of European countries, aroused only limited interest in the Conference.

4. These remarks are made in order to illustrate that there still remains much to be done in encouraging governments to provide themselves with integrated data on social conditions, and in bringing to their attention the usefulness of family living studies in this task. However, there is little doubt that opportunities for such surveys will occur with increasing frequency, and that in due course many countries may want to follow the example of the National Sample Survey of India, which has set high standards in this field. Multi-purpose surveys on this scale aim, over a period of time, to provide a comprehensive picture of many components of levels of living, and stand at the opposite extreme from specialist inquiries into, say, nutrition or housing. Between these extremes there are more modest types of multi-purpose surveys which cover several aspects of family living though their emphasis lies on a single one. The ILO, for example, frequently engages in survey projects centred on questions of employment, and, wherever possible, the opportunity will be taken to broaden the content of such surveys to cover related aspects of levels of living.

5. Another type of broadening is envisaged in relation to the type of household survey that comes most frequently within the work of the ILO, namely inquiries on income and expenditure. Such inquiries are sometimes considered "narrow", but this description is justified in only a special sense. Expenditure surveys are

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not narrow in the sense that this term applies to many specialist inquiries concerned with only one aspect of levels of living. On the contrary, expenditure surveys are likely to cover virtually every aspect of levels of living, and any "narrowness" in them derives from the fact that their only unit of measurement is a financial one. In the narrowest expenditure surveys housing is approached through questions on rent and rates, rather than on housing conditions and amenities; nutrition is somewhat remotely approached through questions on food expenditure, not on actual food intake; and so forth. These financial aspects are an integral, perhaps even the most important, part of levels of living, but they are not the whole picture. It is clear that the addition of even three or four key non-financial questions on each of the main aspects of levels of living can considerably increase the value of an expenditure inquiry. The additional information helps to illuminate the expenditure data, and at the same time to provide those working in other fields with basic information. Moreover, the additions can often be made at low marginal cost in money, staff and time.

6. It is recognized that some situations may not be suitable for such extensions, and that the ultimate decision must always rest with the government or authority sponsoring the survey. Nevertheless, the ILO has greatly broadened its activities in this direction and will continue to concern itself with the practical and technical problems of multi-purpose surveys.

7. In the present discussion only the ILO's activities on family living studies are discussed, although all the international agencies are recognized to have a deep interest in this field. Multi-purpose surveys invariably cover areas of interest to more than one agency, and it is desirable that they should be carried out on a co-operative basis. The ILO expects to call on the other agencies for guidance with regard to subjects in their particular fields of specialty and has already conferred with several agencies regarding the possibility of joint multi-purpose surveys. In converse, if income and expenditure questions are added to a survey primarily concerned with, say, food consumption, health or housing, the ILO will be pleased to advise on definitions, question wording, instructions, and so forth. In short, as the Statistical Commission emphasized in its last report, broad family living studies are par excellence a field for co-operative action between the different agencies.

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8. The above paragraphs have dealt with one type of extension of the work on family living studies, namely a general broadening of content. A second extension, which underlies some of the ILO's current projects, is related to the geographical coverage of surveys. Most household expenditure surveys in the past have concentrated on urban communities. This is partly due to the fact that consumer price indices, which commonly result from the surveys, are usually required first for urban wage-earners, but partly it is accounted for by the special difficulties of rural surveys. Yet, many countries in Asia, the Middle East, South Eastern Europe and Latin America, are particularly interested in surveys among rural and small-town populations, since these are numerically the most prominent and economically the worst off, and since information about them is especially scanty.

9. The ILO is conscious of the need for more experience in the conduct of family living surveys among rural populations, including methods of dealing with income and expenditure questions under conditions of subsistence production. It proposes, therefore, during the next few years, to give special emphasis to family living studies in small towns and rural areas. Several of the projects described in Part II are aimed to throw light on the problems involved in such studies; the ILO has discussed some of these projects with representatives of the FAO, and will continue to seek the advice and collaboration of that agency. It may be added that, since it is particularly unrealistic in rural conditions to isolate income and expenditure from other aspects of levels of living, a multi-purpose approach is generally called for.

10. The ILO would be glad to receive the comments of the Statistical Commission on the foregoing; in particular on the proposal to emphasize the work in small towns and rural areas.

Part II. Recent and Current Work

11. This part of the report, for which the preceding remarks provide the context, deals with specific projects, currently under way or in an advanced planning stage, which have been developed by the ILO to promote interest in broad family living studies, to develop methods and to demonstrate the results attainable. In establishing the programme it has been necessary to overcome many obstacles, some of which have been mentioned in earlier pages. Recent progress has been facilitated by the appointment of a specialist in this field, who is devoting his time exclusively to family living studies for a period of one year. The following projects are considered under three headings. (1) field projects; (2) Asian Seminar on Labour Statistics; and (3) documentary projects.

Field Projects

12. Of a dozen of more family living studies with which the ILO has been closely concerned during the past two or three years, four depart considerably from the traditional limits of expenditure surveys and are of chief interest for present purposes. These are in Indonesia, India, Ceylon and Greece. Three of these represent approved projects which will be in full operation in 1958, while one is tentatively scheduled for 1959.

13. The study in Indonesia has been under way for more than a year. Until recently it has been concerned primarily with income and expenditures, though simultaneous small-scale studies have been conducted to throw light on employment and unemployment problems. So far the inquiries have been confined to urban communities. The extension of the inquiries to rural areas has long been thought desirable, and as a first step it is proposed to undertake a pilot project in Woerjantore (central Java). This will aim to cover income and expenditure information and other aspects of levels of living, and special attention will be paid to under-employment, both visible and disguised. The detailed planning of the survey is now under way and the fieldwork is expected to begin early in 1958.

14. A series of experimental field studies to be undertaken in India this year, in co-operation with the Indian Government, should contribute substantially to existing knowledge regarding the measurement of levels of living. The prime aim of these experimental studies will be to develop concept-, methods and

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techniques relating to the measurement of under-employment; other aspects of levels of living will also be brought into the picture, but a full-fledged multi-phase household survey need not be undertaken because of the wealth of material available from the various rounds of the National Sample Survey. The special importance of the experimental studies is that they will be explicitly concerned with methodology, and that the methods developed in them will be considered later for incorporation in the country-wide surveys conducted by the National Sample Survey.

15. A third study which is to be under way in 1958 and which is closely relevant to the subject matter of the present Report is the project in Ceylon. The main part of this study is a household survey into employment, unemployment and under-employment, i.e., a specialist survey. Provision has been made, however, for a number of small-scale pilot studies which will be of help in determining the concepts and techniques to be used in the main survey and will be broad enough to throw light on many aspects of the level of living. These pilot studies will take place in strongly contrasted areas, especially rural ones, and will be conducted by intensive methods. Supplementary inquiries will provide information on the institutional features of community life.

16. A further family living study of considerable interest is operating in Greece. This technical assistance project has been under way for nearly two years but up to the present time has been concerned with income and expenditures in urban centres. Extension to small towns and rural areas has been contemplated from the beginning, however, and the Greek authorities are now considering an ILO proposal as to the particular type of rural survey to be made.

17. The proposed survey is planned to cover the central features of household life, namely household structure; work, income, expenditure and consumption; the ownership of land and other assets; housing accommodation and amenities; education; health; nutrition; and recreation. Some of these topics will receive more attention than others, and it is not anticipated that all the information will be sought from all the households in the sample. Additional data will be collected from institutions, such as schools and hospitals, and it is intended that a picture of community facilities will form an integral part of the enquiry.

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18. On the basis of the proposed plan, the survey will take place in 1959. It is recognized, however, that the survey raises many acute technical problems on which present experience is limited, and that more than the traditional type of pilot survey is required before the main enquiry could be successfully launched. The ILO has therefore proposed that there should be a series of trial-and-error studies in 1958, to be followed by a formal pilot survey; and the indications are that this suggestion will be accepted. The early studies would be on a small scale, confined to a few villages and small towns, and would be conducted within the framework of the current technical assistance project. The co-operation of other international agencies interested, and especially of the FAO, will be sought in the technical planning of the experimental studies, as well as in the main survey.

19. One other aspect of this project should be noted. While the primary purpose of the main survey will be to provide the Greek Government with a factual picture of living conditions in small towns and rural areas, there is little doubt that the survey would arouse interest much further afield. As suggested in Part I above, many countries have a particular need for family living studies in rural areas, and the projected survey in Greece would give an outstanding opportunity for a study and demonstration of the problems involved in such enquiries. The ILO has therefore put forward the suggestion that the survey might be used as a demonstration project to enable officials of other countries to study at first hand the problems involved in rural family living surveys. This aspect of the project has been discussed informally with the secretariat of the Conference of European Statisticians.

Asian Seminar on Labour Statistics

20. The ILO will hold a seminar on labour statistics in Asia at the end of 1958. This will be the second Asian seminar since the war, the first having been held in India in 1951. The present one will be the first of a series of regional seminars which it is intended to arrange under the Technical Assistance Programme, and it is hoped that the next one may be held in Latin America. The 1958 seminar will concentrate on two subjects known to be of particular interest to Asian countries, family living studies and the measurement of under-employment. The

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seminar is intended to provide an exchange of information on these matters, and to this end less emphasis than is customary will be given to lectures and more to round-table discussions. To aid the discussions, study outlines will be prepared for each session and circulated ahead of time. The critical examination of case studies will form a vital part of the programme, and it is hoped that the participants in the seminar, as well as the discussion leaders brought in from outside, will present relevant projects from their own countries for discussion.

21. The seminar will last for about two weeks, and will include practical demonstrations and visits. Individual discussions will be led by experts from within and outside the region. There will be provision for some twenty participants as well as additional places for local observers. It is intended that participants should be high-level officials, that is persons who carry considerable responsibility for statistical activities in their own countries. One practical objective of the seminar will be to encourage additional Asian countries to undertake household enquiries into levels of living. It is anticipated that the Conference of Asian Statisticians will be associated in the sponsorship of the seminar.

Documentary Projects

22. At its last meeting the Statistical Commission drew attention to the need for further work on the methodology of family living studies, and "expressed the hope that the ILO would be able to prepare a summary report on the methods used in various countries, calling attention to methods which have been particularly successful under differing circumstances." A first step in this direction had been the preparation of the bulletin on Chief Characteristics of Recent Family Living Studies. Judged by the wide demand for this document, and the use made of it, it is clear that the bulletin served a useful purpose. The ILO now plans two other main enterprises related to the methodology of family living studies, a symposium of case studies and a series of technical guidance papers.

23. The Symposium on Family Living Studies is planned to describe and discuss the methods used in some of the major studies of recent years. Its aim is to make available to government officials, international organizations, research workers and foundations, a discussion of some of the best work done in this field, as well

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as of the technical problems still awaiting solution. The book is to be organized on a case study basis, so as to bring out the inter-relation between the various stages of a survey. Leading authorities and organizations in the field will be invited to contribute the individual chapters. The introductory chapter, to be prepared by the ILO, will describe the development of family living studies; distinguish the different types of surveys according to their purpose and methodology; discuss critically the methods used in such surveys, drawing out points of special interest from the studies in the book, as well as from others; comment on the costs, organization and sponsorship of family living studies, including the role of the technical assistance programme; and discuss the use of such studies in measuring levels of living. The introductory chapter will thus provide the framework for the remainder of the book.

24. Some 12 to 15 case studies will be included in the symposium, and the aim governing their choice will be to illustrate a wide variety of applications and of local circumstances. Most regions of the world will be represented, and preference will be given to multi-purpose rather than specialist inquiries. By and large, the book will be confined to inquiries conducted under official auspices, and to large-scale statistical studies, and preference throughout will be given to inquiries conducted during roughly the past five years. However, none of these criteria for selection will be regarded as hard and fast rules: the overriding consideration governing the choice of a study will be its methodological interest.

25. Each case study will be divided into two parts, of which the first will contain a series of rather brief notes on the objectives, methods, costs and administrative arrangements of the survey. The second and major part of each case study will be devoted to those features of the survey which, for one reason or another, were of special interest and importance; they might be new problems or new solutions to old problems, or simply illustrations of standard methods carried out with particular success. Care will be taken to ensure that all the major aspects of methodology are covered somewhere in the book, and that unprofitable duplication is avoided. The approach of the symposium will be concrete, with emphasis on the practical aspects of studies, but it will not be intended as a survey manual. While it must be acknowledged that certain

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arrangements must yet be made before publication can be assured, plans for the volume are well advanced. It is hoped to have it ready for the printers early in 1959.

26. A second major project in this field is a series of Technical Guidance Papers on individual aspects of family living studies. The need for such a series has been recognized for some time, but various obstacles, including the difficulty of arranging for publication of contributed papers, have delayed progress in this work. These problems are not yet completely solved. A start can shortly be made with one or two papers, however; since much has already been written on sampling, priority is being given to problems of data collection on the one hand, and of analysis on the other. Papers are planned on: multi-purpose questionnaires; interviewer selection and training and field work organization; methods of data collection in household expenditure surveys; the conduct of income and expenditure surveys under conditions of subsistence economy; definitions and instructions for income and expenditure questions; coding schemes for income and expenditure data; the classification of household expenditure. Some of the guidance papers will be written by the staff of ILO, others by outside experts; and the papers may later be combined into a manual. Work on several of the above subjects is connected with the preparation of papers for presentation to the forthcoming session of the International Statistical Institute, for the next meeting of the Conference of Asian Statisticians, and for the International Labour Review.

27. In addition the ILO has continued its work on the Bulletin on Family Expenditure Studies which brings together the main results of about fifty recent studies from forty countries. The results will be presented in seven tables (household size and composition; source of household income; type of household expenditure; distribution of consumption expenditure; distribution of expenditure on food and drink; distribution of expenditure on miscellaneous items; quantities of food consumption), and will be classified by major cities and regions, by social groups, by total income or expenditure, and by household size. Tabulation and checking of the data, and the preparation of textual material, are to be completed by June 1958. The Bulletin will later be distributed for comment.

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Part III. Terminology

28. The term "family living studies" has for long been used to describe what are primarily income and expenditure surveys, and it is still commonly used in this sense by the ILO and others. At the same time, it is applied to studies concerned with patterns and levels of living in the wide sense. In the present Report, the term has been used in both senses as the context demanded.

29. In endorsing the view of the ILO Working Group of Experts that family living studies provide appropriate means of studying patterns or levels of living, the Statistical Commission in its Ninth Session "expressed some dissatisfaction with the term 'family living studies' because of the past association of that term with more limited studies of income and expenditure. Moreover, because of differences in definitions of households and families from country to country, the Commission was not entirely satisfied with the term 'household inquiries into patterns and levels of living' proposed by the above-mentioned group of experts. The International Labour Office was asked, therefore, to give further study to questions of terminology, and to report these conclusions to the Commission at a subsequent session." The present discussion, like that in the Statistical Commission report referred to, relates more particularly to the term as expressed in the English language; slightly different problems may be met in other languages.

30. The substantive words of the term "family living studies" are the first two, relating respectively to the unit of inquiry and to the content of inquiry; they will be discussed in this order below. The third word in the term refers broadly to the nature of an inquiry and, in the English language, four alternatives for it are used more or less interchangeably. survey, investigation, study and inquiry. Of these the last two are perhaps the most satisfactory, and in the terms proposed below the word inquiry is used.

Unit of Inquiry

31. As regards the unit of inquiry, the main alternatives are family and household. The Statistical Commission questioned the use of the latter term because of the differences in definition of households and families from country to country. This objection applies equally to the term "family". Difficulties

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of defining households and families are well-known, but, whatever definition one adopts, it is clear that "household" is the wider concept of the two.

32. The appropriate unit of inquiry varies from survey to survey. For a study of fertility the biological family will be the relevant one, whereas for a study of housing or expenditure the household is more likely to be appropriate. For other inquiries, for example in censuses of population, it is customary to employ both units; the unit of enumeration is generally the household and this is used for most of the analyses; but for certain matters, the family in the narrower sense may be of interest and data for it can then be extracted at the tabulation stage.

33. Strictly speaking, then, some surveys are household surveys, while others are family surveys, and it might be argued that every inquiry should be described by whichever term is strictly applicable. There is some advantage, however, in having a general term and, since inquiries on income and expenditure as well as those concerned broadly with levels of living are more often in terms of the household than of the family, household is suggested as preferable. In cases where this is thought to be positively misleading, the term "family" can be used instead.

Content of Inquiry

34. The second word of the term relates to the content of the inquiry, and its object should be to indicate broadly what the survey is about, without attempting to define its content in detail. A specialist survey devoted wholly to nutrition or to education can be called such in the title; to call it a family, or household, living inquiry is misleading since only one aspect of levels of living is covered.

35. There is less reason for withholding this term from an expenditure inquiry. For one thing, such an inquiry will cover many aspects of levels of living, while for another, expenditure information can justifiably be regarded as the unifying element in any study of levels of living. Even so, it may be desirable to use a more precise description for inquiries devoted more or less exclusively to incomes and expenditures, and for this purpose household expenditure inquiries seems the most appropriate term. The fact that such inquiries have for long

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been called "family living studies" should not argue against a change. There is now a far greater diversity of surveys than formerly and a consequent need for a more precise use of terms.

36. If the above suggestion is followed, the term household living inquiries would be reserved for surveys which cover several aspects of levels of living in some detail; as a central and unifying element these surveys would normally include an analysis of expenditures but there would be non-financial questions as well. The proposed term is indeed similar to the term "household inquiries into patterns and levels of living" with which the Statistical Commission expressed some dissatisfaction, but it is a more convenient term to use and perhaps more flexible in application.

37. It is unprofitable to attempt to lay down hard and fast rules regarding the use of the term "household living inquiry". A multi-purpose survey on the Indian model would clearly justify such a description, and a survey strictly confined to employment or to nutrition would not. But between these extremes there are many surveys which could, with greater or lesser justification, be called household living inquiries, and it is suggested that the term should not be used unless at least several components of levels of living are each covered by several questions. It may not be necessary, or wise, to be more precise.

Summary

38. Although the term "family living studies" has undoubted merits as a description of broad levels of living, it has the one major disadvantage that, through past misuse, the term has become associated with more limited surveys. In consequence, it is desirable to substitute another term, and household living inquiries is here proposed. It is not an ideal term, but it seems the best fitted to the circumstances.

39. This term, however, should be applied only to inquiries which cover a number of different aspects of levels of living in non-financial terms, and which normally include, as a unifying element, a comprehensive analysis of expenditures. Surveys dealing exclusively with expenditures, or with incomes and expenditures, should be referred to as household expenditure inquiries. The comments of the Statistical Commission on these conclusions and on the preceding observations will be appreciated.
