

*Statistical Policy Working Paper*<sup>1</sup>

# Improved Measurement of Household Relationships in Federal Surveys

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Paper 1. Measuring Same-Sex Co-Residential Relationships

September 2014

Interagency Working Group on  
Measuring Relationships in Federal Household Surveys (MRFHS)

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<sup>1</sup> This working paper is intended to inform interested parties and to encourage discussion of Federal statistical policy issues and standards. It does not represent any change to Federal policy. Any views expressed herein are those of the authors.

## Executive Summary

The latter half of the 20th century saw dramatic changes in family configurations, living arrangements, and marital and household relationships in the United States. These changes accelerated during the 1960s and have continued into the 21st century. The reasons are varied and complex.

Federal data play a key role in understanding household change, stability, and instability, yet measures of household relationships in Federal surveys have not kept pace with these changes. The questions Federal agencies ask and the data they collect determine our ability to describe American households and families, but in an ever-evolving American society, asking the “right” questions is not always easy. Ultimately, the accurate measurement of household relationships is critical to understanding society and the potential impacts of Federal, State, and local government programs targeted to improve the well-being of households and families. Accurate measurement of household relationships is critical even where explicit policy and programs are absent: measurement can inform understanding of group outcomes as they differ over time. The U.S. is a broad and diversifying society, and enabling understanding of outcomes for all Americans is in the public interest.

The Interagency Working Group on Measuring Relationships in Federal Household Surveys (MRFHS) was established in 2010 to address the long-term challenges in measuring household relationships, including same-sex couples. It was convened and chaired by the Statistical and Science Policy Branch of the Office of Management and Budget (OMB). Because any major change to a fundamental measurement item such as household relationship would impact virtually all Federal surveys and have possible implications for descriptive, planning and funding purposes, MRFHS was created to ensure that the full range of affected agency users and producers of household relationship data could be represented in discussions to identify the issues and possible action strategies moving forward. The working group includes approximately 30 representatives from a variety of Federal agencies involved in the collection, dissemination and/or use of household relationship data.

This report summarizes the initial work of the MRFHS working group, which has focused on the measurement of same-sex married and unmarried couples living in the same household. It addresses the following primary questions:

- How are household relationships in Federal surveys currently measured?
- How do Federal agencies use household relationship data collected in Federal surveys?
- How robust are current measures of household relationships in Federal surveys?
- What would a plan to test changes in the measurement of household relationships look like?

The MRFHS working group reviewed more than 55 surveys and supplements from 10 Federal agencies to evaluate how Federal agencies measure marital status, cohabitation and household relationships. In comparing Federal surveys the group noted several key measurement differences that may affect survey estimates. These include: 1) variation in response categories (for example, more categories and/or different category wording); 2) inconsistent measurement of relationship to child; 3) infrequent measurement of interrelationship of all household members; 4) inconsistent measurement of cohabitation; 5) infrequent measurement of sex for all household members; and 6) inconsistent inclusion of State of current residence and State where married. Such measurement variation can contribute to differences in estimates of family and household relationships across Federal surveys.

The working group also examined how Federal household data are used by Federal agencies. By and large, government agencies use household relationship and marital status data for descriptive, planning, and funding purposes. Descriptive purposes—seen largely in statistical offices such as the Bureau of Labor Statistics; the Census Bureau; and the Social Security Administration’s Office of Research, Evaluation, and Statistics—include providing the public and other agencies with detailed information and analysis about the state of and trends in areas including household composition and derivative measures. Planning purposes—exemplified by the USDA’s Food and Nutrition Service, the Department of Commerce’s National Telecommunications Information Administration, and the Department of Defense—include agencies using household composition and derivative data to strategize future program tests, changes, and management. Lastly, funding purposes—demonstrated by, for example, the Department of Housing and Urban Development’s Section 8 Housing Assistance and Community Development Block Grant programs, the Department of Education’s Title 3 funding program, and the Department of Health and Human Service’s Administration for Children and Families’ Community Service Block Grants program—use household composition and derivative data to allocate Federal funds to States, localities, and organizations.

The working group then reviewed a series of research studies on measuring relationships in Federal demographic surveys, several of which were conducted under the auspices of the working group. Most of the research was sponsored by Federal agencies and much of it focuses on measurement of same-sex couples or families that include same-sex parents. Although the focus is predominantly on relationships within households, members also discussed the topic of measuring relationships between households.

Through our review of current measures, data uses, and research on measurement strategies, the MRFHS working group has arrived at several suggestions for improved measurement of same-sex household relationships. First, question wording should incorporate sex-neutral language wherever possible.<sup>2</sup> Second, Federal surveys should continue working to collect information on intimate relationships other than opposite-sex marriage. Examples of question wording and response categories developed from the current research are provided and should be further tested in large-scale field tests. Third, Federal agencies should review their current use of editing and processing procedures with respect to sex, relationship, and marital status. Where these items are edited in Federal surveys, we encourage Federal agencies to consider the effects that their editing procedures may have on produced estimates of same-sex relationships. Further, if existing editing and processing procedures will continue to be used for a particular survey, Federal agencies are expected to document these procedures and, where possible, incorporate metadata such as flagging the affected cases, consistent with professional practice. Additionally, we suggest that a broader scope be adopted moving forward. Although measurement issues regarding same-sex couples are quite important in their own right, they represent a small part of a much larger, complex set of concerns related to relationship measurement, all of which deserve attention and inquiry. Finally, results from tests and discussions should be widely shared, not only among Federal agencies but also with other interested parties such as academic and policy research organizations. When applied together, revised questions, continued testing, transparent procedures, a broadened focus, and collaborative sharing will ensure that progress continues on this important and evolving issue. Through the convening of the working group and its systematic work, a research agenda has developed and better practices have been identified. Nonetheless, at the present time the working group does not recommend a single measurement approach that addresses all of the issues identified.

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<sup>2</sup> In this paper, sex neutral language refers to language that does not restrict survey responses on the basis of biological sex (i.e., male or female) or gender role (i.e., father or mother) categories.

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## Chapter I. Introduction and Scope of the Report

U.S. Federal statistical agencies' household surveys provide critical information on the social and economic conditions of society that informs decisions by policymakers, businesses, governments, and individuals. Demographers and academic researchers also rely on data from these Federal household surveys to describe and explain changing societal conditions. As society changes, our tools for measurement must also change and adapt in order to better capture current and future conditions.

### A. Changing Household Composition in the U.S.

In the United States, the latter half of the 20th century saw dramatic changes in family configurations, living arrangements, and marital and household relationships.<sup>3</sup> These changes accelerated during the 1960s and have continued into the 21st century.

The reasons for these changes are varied and complex. In part, recent household relationship changes may reflect the changing status of women in our society: women (and men) now have more socially acceptable alternatives to life-long marriage, including remaining single, delaying marriage, separating, divorcing and remarrying. Some have opined that change in household relationships, particularly increases in cohabitation--especially among those persons with lower income, may be related to long periods of unemployment and economic uncertainty (Kreider, 2010). Increased incarceration is also important to understanding instability in household relationships. These persons may or may not return to their households at time of re-entry. Cultural and social differences in living arrangements among indigenous Americans, recent immigrants, doubled-up, multiple-family, and "boomerang" households (that is, households with young adults who return to their parental home) contribute additional dimensions to changes in household relationships.

The exact cause of these changes notwithstanding, a number of high-level changes in U.S. household composition have occurred over the last half century.

#### *1. Increase in One-Person Households*

One of the biggest changes in household composition has been the increase in one-person households. In 1940, just eight percent of households were someone living alone; in contrast, more than one quarter of households currently contains just one person. Since these households are nonfamily by definition, they affect the overall distribution of households by type and size. The largest group of one-person households is persons age 65 or older, but 22 percent of one-person households comprise persons under age 25 (U.S. Census Bureau, 1940-2010) (Bureau of Labor Statistics, 2010).

The increase in one-person households and recent declines in fertility have led to a decline in average household size. Although households had an average of 3.7 people in 1940, this declined to 2.6 in 2010 (U.S. Census Bureau, 1940-2010).

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<sup>3</sup> See Box 1.

## *2. Decrease in Family Households*

The decrease in family households varied depending on the particular type of family. Since 1970, married couple households with children under 18 have decreased, while married couple households without children under 18 remained roughly constant as a proportion of all households. Other family households have increased during this time, most of them involving an unmarried parent with children under age 18. (Vespa, et al., 2013)

Although a small percentage overall, nonfamily households that contain more than one person have also increased. This type includes cohabiting couples who do not have children (or any other relative of the householder) present, as well as households consisting of unrelated housemates or roommates.

The decline in married couples with children is also affected by the increase in the median age at first marriage. Young adults wait longer to marry and may live as cohabiting couples before they have children (nonfamily household) or begin having children before they marry (for example, family household if both of the cohabitators are the parents, or if one parent is the householder; nonfamily household if the non-parental partner is the householder). The increasing age at first marriage also affects non-marital childbearing. The median age at first birth is now earlier than the median age at first marriage. This is reflected in the increase in “other family households,” many of which consist of an unmarried parent and his/ her children.

## *3. Greater Diversity in Living Arrangements of Children*

Diversity in living arrangements of children among American households has increased, although part of the rise may actually reflect an improved ability to measure the relationships among household members. Major shifts in living arrangements occurred between 1970 and 1990, when the proportion of children living with their mother without their father present doubled from 11 percent to 22 percent. During the same period, the percentage of children living with two parents declined from 85 percent to 73 percent. Since 1990, the changes in children’s living arrangements have continued, albeit at much slower rates. In 2009, 69 percent of children lived with two parents, and most of these children lived with two biological or adoptive parents. During the same period, 27 percent of children lived with one parent, and most of these children lived with mothers not living with a partner. Further, most of the four percent of children living with no parents lived with a grandparent. (Kreider & Ellis, 2011)

## *4. Growth in Co-residential Unmarried Couples*

Another change in American households is the rising number of couples living together as unmarried partners. The number of unmarried, opposite-sex couples increased from 2.9 million in 1996 to 7.5 million in 2010. The proportion of unmarried, opposite-sex couples who do not have children has also increased to 62 percent. (U.S. Census Bureau, 1996-2010)

In particular, the data show a sharp increase in the total number of opposite-sex unmarried couples between 2006 and 2007 (from 6.7 million to 7.5 million); however, this jump is actually due to a fairly simple change in data collection methods. (Kreider, 2010) In 2007, the Census Bureau introduced a direct question on the Current Population Survey (CPS) that allows inclusion of couples in which neither partner is the householder. Additionally, asking the direct question—“*Do you have a boyfriend/girlfriend or partner in this household?*”—resulted in a higher number of reports of an unmarried partner for the householder. This relatively small change in data collection wording made a sizable difference in the estimates.



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*Box 1. What is a Household Relationship?*

*Defining and measuring relationships has long been a challenge for social scientists and survey methodologists. Relationships within households are no exception. Household relationships are of particular interest to researchers and policy makers because of the many policies and programs designed to benefit households and families. The nature of these relationships may be legal, economic, biological, social, emotional, romantic, sexual, religious, simply residential, or include many of these aspects. For the purposes of this report, household relationships include all individuals living in the same housing unit. As discussed in Chapter 2, household relationship measurement necessarily will vary according to the purpose of measurement.*

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## *5. Greater Recognition of Same-Sex Couples*

In 1990, the Census Bureau first provided “unmarried partner” as an answer category to the question regarding relationship to householder. However, couples who reported they were the same sex and that they were married were edited and shown as opposite-sex married couples in 1990. To provide a more accurate representation of same-sex couples, rather than assuming they were opposite-sex couples who had mismarked sex for one spouse, the Census Bureau changed the processing of the 2000 and 2010 Censuses by showing couples who reported as same-sex married couples as same-sex unmarried partners. (Simmons & O'Connell, 2003) (O'Connell & Gooding, 2007) (O'Connell & Feliz, 2011) The Census Bureau has also released special tabulations and reports examining the effect of processing and editing on relationship and other content. (O'Connell & Feliz, 2011) (O'Connell & Gooding, 2007)

Same-sex couple households are a growing group, partially due to increasing social and legal recognition of same-sex marriages in a number of States in recent years.<sup>4</sup> Approximately one percent of all coupled households nationwide are same-sex couples, although there is considerable variation at the State level. The percentage of same-sex couple households across the country for the 50 States and the District of Columbia ranged from 0.29 percent for Wyoming to 4.01 percent for the District of Columbia. (Lofquist, 2011)

The 1996 Defense of Marriage Act (DOMA) prohibited Federal recognition of same-sex married couples for some Federal programs and benefits. This affected the degree to which Federal agencies had a policy need for Federal data regarding same-sex couples. On June 26, 2013, the Supreme Court ruling struck down DOMA as a means to prohibit Federal programs and benefits to same-sex couples but upheld State determination of legal recognition of marriage. This ruling and its interpretation likely will affect the data processing procedures and the estimates published by Federal agencies.

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<sup>4</sup> According to Wikipedia: [http://en.wikipedia.org/wiki/Same-sex\\_marriage\\_in\\_the\\_United\\_States](http://en.wikipedia.org/wiki/Same-sex_marriage_in_the_United_States), accessed July 9, 2014, the following States provide limited or full recognition of same-sex marriage or civil unions: Massachusetts: 2003; California: 2008; Connecticut: 2008; Iowa: 2009; Vermont: 2009; New Hampshire: 2009; Washington, D.C.: 2009; New York: 2011; Washington: 2012; Maine: 2012; Maryland: 2012; Rhode Island: 2013; Delaware: 2013; Minnesota: 2013; New Jersey: 2013; Hawaii: 2013; Illinois: 2013; New Mexico: 2013; Oregon: 2014; and Pennsylvania: 2014.

## B. Measurement Challenges

Federal data play a key role in understanding household change, stability and instability, yet measures of household relationships in Federal surveys have not kept pace with these changes. The questions we ask and the data we collect determine our ability to describe American households and families. In an ever-evolving American society, however, asking the “right” questions is not always easy. There are a number of challenges to improved measurement of household relationships:

- Official definitions may not be known or used always by the general public. For example, the legal definitions of or distinctions between a civil union and a common-law marriage may not be well understood.
- There may also be differences in meaning of shared, but unofficial, terminology. For example, cohabiting couples may be more likely to consider their household relationship as “girlfriend or boyfriend” rather than “unmarried partner.”
- Similarly, there may be difficulties in determining the usual residence for sexual partners who cohabit between two households.
- Context may also make a difference in perceptions or reporting. For example, it is unclear how legally married same-sex partners who reside in a State that does not recognize same-sex marriage would or should describe their relationship.
- Perceived social desirability and stigma may also play a role in the selection of measures. Some relationships may be seen as unconventional by others, and sensitivity concerns may affect the likelihood of posing the question as well as answering it, particularly for certain data collection modes.
- Some household types are comparatively small groups. For example, since there are far more opposite-sex married couples than same-sex couples, a small error rate among opposite-sex married couples can result in wide swings in the estimates of same-sex couples.
- Changes to the definition of family or marriage could affect other aspects of the data. Some couples currently listed as unmarried partners would be family households if they were shown as married couples—although some unmarried partners are already classified as family households, often due to the presence of children in the household.

For example, counting same-sex married couples as families would translate into different poverty rates for some families since it would include the additional income of more household members. It also would affect the number of parents present for children of the householder in some cases. Currently, we consider the spouse as a parent of the children in the family automatically. Before instituting changes, we must consider how subfamilies<sup>5</sup> are organized; for example, under what

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<sup>5</sup>A subfamily is either a married couple (with or without children under 18) OR a parent/child group where the children are under 18, and the household reference person (i.e., the person selected as the unit of reference when rostering a household) is not included in the family unit.

conditions could we assume a same-sex married couple is a subfamily in surveys where we are not asking for the identification of a spouse directly?

Additionally, our understanding of other characteristics of families might not be consistent if the State definition of a family differs from the Federal definition. In these cases, estimates of certain types of family groups may indicate they are not receiving a particular benefit, while in fact, they are not eligible for the benefit given State definitions of family. This mismatch already exists in the reverse<sup>6</sup> and could affect benefits and services distributed through such programs as food stamps and health insurance. Characteristics that are reported by family type, like home ownership or the presence of parents, would also be affected.

Ultimately, the accurate measurement of household relationships is critical to understanding society and the potential impacts of Federal, State, and local government programs targeted to improve the well-being of households and families. Available data from Federal household surveys can be used in a variety of ways in this context, including the following:

- The research and policy community use available household relationship data to monitor program outreach by estimating the number of potentially eligible recipients and their participation in programs.
- Programs use available data to project the future caseload for the program, suggesting future program costs.
- Policymakers use available data to understand the impact of alternative program rules and policies affecting individuals, families, households, or larger groups.

Where data gaps exist, programs and policies can be limited in their ability to use evidence to guide decision-making. Moreover, accurate measurement of household relationships is critical even where explicit policy and programs are absent. Measurement can inform understanding of group outcomes as they differ over time. The U.S. is a broad and diverse society, and enabling understanding of outcomes for all Americans is in the public interest.

### **C. Motivation for This Report**

Same-sex marriage and civil unions were not legally recognized in the U.S. at the time of the 2000 Census. By 2009, several States permitted same-sex marriage or civil unions, and questions and concerns were raised about how same-sex couples would be counted in the 2010 Census. In particular, the Census Bureau and Office of Management and Budget (OMB) received inquiries from Congress and others concerned about the questions on the Census form and the American Community Survey (ACS).<sup>7</sup> In addition, questions were raised about the procedures that the Census Bureau was using to edit data if

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<sup>6</sup> In this scenario, certain types of family groups are not eligible for a particular benefit according to Federal definitions, but are eligible to receive them according to State definitions.

<sup>7</sup> The ACS replaced the Census “long form” after 2000 to gather more frequent and detailed socio-demographic and economic information from a sample of households.

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*Box 2. Members of the Interagency Working Group on Measuring Relationships in Federal Household Surveys (MRFHS)*

*The following agencies provided representatives to MRFHS. Asterisks denote involvement of the agency representative in the writing of this report. We thank all who have contributed their time and effort toward this task.*

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*Administration for Children and Families (ACF)  
Assistant Secretary for Planning and Evaluation (ASPE)\**

*Bureau of Economic Analysis (BEA)*

*Bureau of Justice Statistics (BJS)*

*Bureau of Labor Statistics (BLS)\**

*Bureau of Transportation Statistics (BTS)*

*Census Bureau\**

*Department of Labor (DOL)\**

*Equal Employment Opportunity Commission (EEOC)*

*Energy Information Administration (EIA)*

*Economic Research Service (ERS)\**

*Federal Reserve Board (FRB)*

*Department of Housing and Urban Development (HUD)\**

*Maternal and Child Health Bureau (MCHB)*

*National Agriculture Statistics Service (NASS)*

*National Center for Education Statistics (NCES)\**

*National Center for Health Statistics (NCHS)\**

*National Institutes of Health (NIH)\**

*National Center for Science and Engineering Statistics (NCSES)*

*Office of Management and Budget (OMB)\**

*Office of Personnel Management (OPM)*

*Statistics of Income (SOI), Internal Revenue Service*

*Social Security Administration (SSA)\**

a respondent indicated that a household member of the same-sex was his/her husband or wife.<sup>8</sup>

In an August 2009 letter, the Secretary of Commerce, Gary Locke, asked the Director of OMB, Peter Orszag, in accordance with OMB's responsibilities for developing and issuing standards for the collection and tabulation of Federal statistics, to establish an interagency task force to examine issues related to collecting and tabulating data on relationships, including same-sex household relationships (See Appendix 3.).<sup>9</sup>

Given the timing of decennial census preparations, improved measurement of household relationships could not advance quickly enough to be implemented in the 2010 Census, nor could the processing operations be easily changed. However, the Census Bureau and OMB agreed that several steps could be taken:

- The Census Bureau would review the estimates and, if possible, release additional tabulations and special reports on married and unmarried same-sex couples measured by the American Community Survey (ACS) and the 2010 Decennial Census. These reports, described in greater detail in Chapter 4, explored estimation of same-sex household relationships with data processing procedures that did not alter reported marital status.
- The Chief Statistician at OMB convened an interagency working group to address the longer-term challenges in measuring household relationships, including same-sex couples. Because any meaningful examination of the measurement of household relationships necessitates a dialogue among agencies that use these kinds of data to develop policies or monitor and administer programs

<sup>8</sup> Long-established data editing procedures did not permit measurement or reporting of same-sex marital relationships using census data; records of persons identifying as same-sex and married to each other were edited for sex, or, more recently, as unmarried in the final data file.

<sup>9</sup> Under the Paperwork Reduction Act of 1995 (USC 44 35 3504 (e) (3)) and other legal authorities, the Director of OMB has the authority to implement Government-wide policies, principles, standards and guidelines concerning statistical collection procedures and methods, statistical data classification, and statistical information presentation and dissemination.

as well as the statistical agencies that collect these data, both users and producers of household relationship data were sought to participate in the interagency working group.

#### **D. The Interagency Working Group on Measuring Relationships in Federal Household Surveys**

The Interagency Working Group on Measuring Relationships in Federal Household Surveys (MRFHS) was established in 2010 and is convened and chaired by the Statistical and Science Policy Branch of OMB. Because any major change to a fundamental measurement item such as household relationship would impact virtually all Federal surveys and have possible implications for policy and implementation, MRFHS was created to ensure that the full range of affected agencies could be represented in discussions to identify the issues and possible action strategies for moving forward. The working group includes approximately 30 representatives from a variety of Federal agencies involved in the collection, dissemination and/or use of household relationship data. A list of agencies that provided representatives to the working group is shown in Box 2.

MRFHS was charged to

- research the complex facets of the measurement of marital and household relationships,
- consider the uses of the data and implications and effects for programs and for measurement, and
- prepare recommendations to OMB and other Federal agencies for the development, testing, and use of questions that more accurately capture data on marriage and family relationships.

This report summarizes the initial work of the MRFHS working group through summer 2014, which has focused on the measurement of same-sex married and unmarried couples living in the same household. Measurement issues in the area of household relationships are broad, complex, and continue to change. Therefore, this working group or its successors may produce subsequent reports on related topics, each with a somewhat different focus.

#### **E. Organization of this Report**

Although the scope of the group's charge was broad, the group initially focused on the measurement of same-sex household relationship measurement. To establish a baseline of knowledge, the working group focused the current report on answering the following questions:

- ***How are household relationships in Federal surveys currently measured?*** Across the span of these surveys, are commonalities in measurement found? Are certain commonalities more likely among surveys of a particular content area, such as employment surveys or health surveys? Are commonalities related to intra-agency objectives or inter-agency collaboration? Among more recent surveys, do we see greater variation or convergence in household relationship measurement? How frequently are household relationship data editing procedures used among the Federal surveys included in this report, and what is the nature of those edits? What does this tell us about opportunities for testing or measurement change? Are some measures more comprehensive and better able to assess the diversity of relationships and household structures that currently exist?

These questions are examined in Chapter 2, which describes the major Federal household surveys collecting information on household relationships for policy or research purposes. The

chapter reviews commonalities and differences in measurement among surveys and makes special note of innovative or otherwise particularly strong measurement practices. Measurement trends and considerations for implementing measurement change are discussed.

- ***How do Federal agencies use household relationship data collected in Federal surveys? Among Federal uses, are household relationship data primarily used for descriptive purposes, benefit allocation planning, program funding, or policy evaluation? Which data sources correspond most strongly to which purpose? What data gaps exist, and what solutions are used to meet these? What does this tell us about possible impact of measurement change?***

These questions are examined in Chapter 3. The report describes the wide range of programmatic uses by Federal agencies and the data sources central to key policy uses. The discussion informs and is informed by the ways in which Federal surveys measure relationships. The chapter identifies some notable data gaps and innovative applications, and discusses implications for change among core indicators.

- ***How robust are current measures of household relationships in Federal surveys? Do respondents generally understand how to answer the household relationship questions we pose? Do respondents generally find the questions and categories meaningful? If new measures of household relationships were to be developed, what characteristics would they possess? What has been tested to date that can inform changes to household measures?***

Chapter 4 examines these questions, reviewing the recent scientific literature on household relationship measurement in household surveys. Much of the research described was conducted by agencies participating in the MRFHS working group.

- ***What would a plan to test and implement changes in the measurement of household relationships look like? What are the criteria that would demonstrate improved measurement? How do our findings (Chapter 4) correspond to those criteria? Which elements remain to be tested? What are effective ways of testing those elements? How does our review of current measures (Chapter 2) and current uses (Chapter 3) inform which content areas and surveys might be strong candidates for pilot tests of household relationship measures?***

Chapter 5 explores these questions, and discusses potential research venues and vehicles.

Lastly, we thank the Federal agencies and their staffs who devoted their time and expertise to develop this report. Their willingness, thoughtfulness, and hard work exemplify the best in interagency collaboration.

## **Chapter 2. Measurement of Household Relationships in Federal Household Surveys**

### **A. Introduction**

This chapter documents the measurement of household and family relationships by Federal agencies. Many Federal agencies use household and relationship data to inform both Federal policy and ongoing initiatives. We reviewed more than 55 surveys and supplements from 10 Federal agencies to evaluate how Federal agencies measure marital status, cohabitation and household relationships. This chapter first describes the survey universe and then reviews the use of a household roster and measures of marital status and cohabitation. We discuss the importance of collecting data on the sex of respondent and household members and the impact of editing on publicly released data for the accurate measurement of same-sex couples. We conclude by identifying data gaps and limitations of current surveys. A condensed matrix of the Federal surveys reviewed is included in Appendix 1.

### **B. Scope**

This chapter examines the methods used to collect household relationship information (for example, through household rosters or direct questioning) and the questions used to measure the nature of those household relationships (for example, asking marital status).

Although the Federal government provides funding support for many surveys, including those carried out by, for example, academic researchers the scope of this assessment includes only Federal surveys that are administered on behalf of the Federal government. We limited our review to established surveys that are generally repeated over time as either longitudinal surveys or repeated cross-sectional surveys. Further, we observed that many surveys we initially considered collected household relationship data merely for use as a demographic control variable rather than a key research or policy component. Therefore, we limited our assessment to include only those surveys that collect data on marital and household relationships for descriptive, policy planning, or program funding purposes.

### **C. Household Roster**

Household rosters serve multiple functions in Federal surveys. Household rosters can simply refer to a listing of all household members or, of interest here, can include detailed relationship and demographic data on household members. Out of the 55 surveys and supplements reviewed for this chapter, 13 did not include a household roster.<sup>10</sup> This chapter focuses on household rosters that include data on the relationship of household members to either the householder or other household members.

Collection of the household roster often begins with listing the householder or household reference

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<sup>10</sup> The following Federal surveys do not include some form of a household roster: National Compensation Survey (NCS); National Postsecondary Student Aid Study (NPSAS); Teacher Follow-up Survey (TFS); National Survey of College Graduates (NSCG); National Survey of Recent College Graduates (NSRCG); Survey of Doctorate Recipients (SDR); Survey of Earned Doctorates (SED); Family Medical & Leave Act Survey (FMLA); Medicare Current Beneficiary Survey (MCBS); Residential Energy Consumption Survey (RECS); Agricultural Resource Management Survey (ARMS); and Census of Agriculture. Note that some of these surveys are not household surveys but rather individual-level surveys.

person, who may not be the respondent to the survey. Procedures vary across surveys regarding persons eligible for listing as the householder. For example, the American Community Survey 2014 instructions state that this person should be “the household member living or staying [t]here in whose name the house or apartment is owned, being bought, or rented. If there is no such person, any adult household member can be [the householder].” (U.S. Census Bureau, 2014) Additionally, the roster may be self-reported or instructions may not be followed, leading to the possibility of children or subfamily members being listed as the householder. Selection of the householder affects the relationship information collected, particularly for those surveys that collect relationship information only with regard to the householder.

Further, detailed household rosters collect relationship data in several different ways, including relationship to householder, relationship to child, and interrelationships within households. The majority of Federal surveys ask how household members are related to either the householder or reference person. Although the questions do not vary much across surveys, the response categories differ. For example, a common question asked is “How is [name] related to [you/reference person]?” Some surveys offer short, condensed answer categories, while others are more detailed. All surveys we reviewed that collect household rosters include the following answer categories: reference person/householder, husband/wife/spouse, son/daughter/child, mother/father/parent, brother or sister, grandchild, other relative, and nonrelative.

Not all surveys use the same terminology for the response categories. For example, some survey options include “spouse” while others have “husband” or “wife.” The majority of the surveys include additional answer categories, such as: biological, step, or adopted child; parent-in-law; son-in-law or daughter-in-law; boyfriend/girlfriend/unmarried partner; housemate/roommate; and roomer/boarder. A few surveys include many more additional answer categories. For example, the National Longitudinal Survey of Youth 1979 (NLSY79) and National Survey of Family Growth (NSFG) offer the previously-discussed answer categories and further distinguish between the different types of family members and relationships to other nonrelatives.

A number of Federal surveys also use a household roster to determine relationship to a child. These surveys serve as an indirect measure of same-sex couples, since they include a household roster that measures the householder’s and other household members’ relationship to the child. (For example, two fathers in a household could be identified by their relationship to the child.) Many of these surveys ask about both “relationship to householder” and “relationship to child.” The surveys with both of these measures include: National Longitudinal Survey of Youth 1979 (NLSY79); High School Longitudinal Study(HSLs); National Health and Nutrition Examination Survey (NHANES); National Health Interview Survey (NHIS); National Survey of Children’s Health (NSCH)\*; National Survey of Children with Special Health Care Needs (NS-CSHCN)\*; Child Well-Being and Welfare Module (CWBW)\*; Health Module\*; National Survey of Adoptive Parents (NSAP)\*; National Survey of Adoptive Parents of Children with Special Health Care Needs (NSAP-SN)\*; and the Head Start Family and Child Experiences Survey (FACES).

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\* These surveys were conducted through the State Local Area Integrated Telephone Survey using the National Immunization Survey Frame.



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*Box 3. Most Common Marital Status Format*

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Are you now married, widowed, divorced, separated, or have you never been married?

- ☐ Married
- ☐ Widowed
- ☐ Divorced
- ☐ Separated
- ☐ Never Married

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*Box 4. Marital Status Categories on Cohabitation*

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- ☐ Living with a partner? (FMLA, NHANES, NHIS, RECS)
- ☐ Not married but living with partner of the opposite sex? (NSFG)
- ☐ Living in a marriage-like relationship? (SESTAT)
- ☐ Living with a partner in a marriage-like relationship? (BTLS, TFS)
- ☐ Living in a domestic partnership? (HSLS)

The following surveys only ask about relationship to child: National Longitudinal Survey of Youth 1997 (NLSY97); National Household Education Survey (NHES)— sections include: Adult Education (AE-NHES), After-School Programs and Activities Survey (ASPA-NHES), Early Childhood Program Participation (ECPN-NHES), Household and Library Use (HHL-NHES), Parent and Family Involvement in Education (PFI-NHES), School Readiness (SR-NHES), and School Safety and Discipline (SS&D-NHES); Influenza Vaccination Module for Children (IVMC)\*; National Asthma Survey (NAS)\*; National Survey of Early Childhood Health (NSECH)\*; and Survey of Pathways to Diagnosis and Services-2011 (SPDS)\*. Most of these surveys focus specifically on collecting data about children.

From the surveys we reviewed, there are three ways that the relationship to child can be identified. They are: 1) “What is [your/person’s] relationship to [child]?”; 2) “How is [1<sup>st</sup> child] related to [2<sup>nd</sup> child]?”; and 3) “What is [PERSON’s] relationship to you?” Most Federal surveys that ask about relationship to child ask how a person is related to the child (option 1). Only two surveys ask how a child is related to an adult: the National Health and Nutrition Examination Survey (NHANES) and National Health Interview Survey (NHIS). Both of these surveys ask “Is [name], [reference person/head of household/mother/father’s] biological, adoptive, step, foster child, or son/daughter-in-law?” This question would allow the identification of same-sex couples through their answer to the question and their reported sex.

Data on the interrelationships of household members are collected by only three of the large Federal surveys: National Longitudinal Survey of Youth 1979 (NLSY79), Survey of Income and Program Participation (SIPP), and the Head Start Family and Child Experiences Survey (FACES). Only SIPP clearly asks how all household members are related to each other. These surveys ask

“What is the exact relationship of [household member] to [household member]?” Unlike SIPP, the other two surveys measure the interrelationships by first asking the relationship of all household members to a reference person and then asking about the household member’s relationship to the respondent. However, the Head Start Family and Child Experiences Survey also asks how the children in the household are related to each other.

Although they do not include a direct household roster, the following surveys include questions regarding household membership: Beginning Teacher Longitudinal Study (BTLS); the Early Childhood Longitudinal Study-Birth Cohort (ECLS-B), and the Early Childhood Longitudinal Study -Kindergarten Class of 1998-1999 (ECLS-K). Two examples of questions asking about household membership include: “Do you have a spouse or partner who lives in the same household as you and [TEENAGER]?” and “[BIRTH

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\* Id.

CERTIFICATE MOTHER] has not been identified as the parent respondent. Where is the child's birth mother living?" The National Crime Victimization Survey (NCVS) features a derived variable created from household responses. The variable comprises 32 categories describing the sex of the reference person and presence of children and other adults (related and unrelated to the respondent) in the household.

Surveys that include household rosters and relationship data facilitate the measurement of established as well as emergent household types. By measuring the relationships of household members to each other, researchers and policymakers are able to identify diverse families such as single parents, cohabiting couples, and same-sex couples. The next section discusses the measurement of marriage and cohabitation in the surveys reviewed.

#### **D. Marital Status**

Marital status is the most common measure of family relationship collected in household surveys. Of the 55 surveys and supplements reviewed, 44 asked questions about the respondent's marital status. Box 3 provides the most common format used for the question.

Only one response item can be checked in this format, even though the categories are not necessarily mutually exclusive. One can be widowed and (re-)married, divorced and (re-)married, and by definition separated and currently married. Only a few surveys provide clarification of what these terms mean on the survey document itself. For example, the response categories for two Census Bureau surveys, the Current Population Survey (CPS) and the Survey of Program Participation (SIPP), include "Married, Spouse Present" and "Married, Spouse Absent." The option category of "Married, Spouse Absent," is not shown to the respondent; instead, it is provided for the interviewer to use it if mentioned by the respondent, or it is coded when the respondent does not identify a spouse present in the household.

An important distinction to be made about the measurement of marital status is legal status. Most surveys do not explicitly ask about "legal" marital status. The following surveys do ask about "legal" marital status: National Longitudinal Survey of Youth 1979 and National Longitudinal Survey of Youth 1997. The National Longitudinal Survey of Youth (NLSY 79) marital status response categories use "Legally separated," while the National Longitudinal Survey of Youth (NLSY97) adds the "legal" qualifier to the marital status question stub "Just to confirm our information, what is your current [marital] *legal* status?" A few surveys ask a simplified marital status question. For example, the U.S. Department of Energy Residential Energy Consumption Survey (RECS) asks, "Are you living with a spouse or partner?" This form of the question is less likely to capture exclusively legal marital status, as the term "partner" does not necessarily imply a legal marriage.

Others surveys include definitions of legal marital status in the interviewer instructions or guide to respondents. One example of this is the Health and Human Services (HHS) National Survey on Drug Use and Health, which combines the Divorced and Separated categories, and provides the interviewer with definitions to use. Both the wording of the questions and the instructions provided can influence the meaning of the marriage question and the response provided.

#### **E. Cohabitation**

A number of surveys have added an additional category to the marital status question to capture cohabitation. These include: Family and Medical Leave Act Survey (FMLA), National Survey of Family Growth (NSFG), National Health and Nutrition Examination Survey (NHANES), National Health Interview

Survey (NHIS), Scientists and Engineers Statistical Data System (SESTAT), Beginning Teacher Longitudinal Survey (BTLS), Teacher Follow-up Survey (TFS), and High School Longitudinal Survey (HSLs). The language and the placement of the response category varies (for examples, see Box 4). It should be noted that the surveys that do ask about cohabitation are not necessarily limited to couples living together as unmarried partners or boyfriends/girlfriends. They could also capture those couples who are living in a domestic partnership or civil union. The Bureau of Justice Statistics is currently considering including domestic partnership information in its National Crime Victimization Study.

Adding a category to the marital status response is the most common way of measuring cohabitation. Nine of the 15 surveys that measure cohabitation do this. Although this is the most frequent way of measuring cohabitation, it is not the only way surveys capture this relationship status. As discussed above, the inclusion of the response category “unmarried partner” in the relationship question is one method for identifying cohabiting couples. Also, several surveys that focus extensively on family relationships include detailed questions about relationships instead of, or in addition to, the expansion of the marital status response categories. The Departments of Education, Health and Human Services, Justice, and Labor, as well as the Census Bureau, all utilize this alternative strategy.

Five of the components of the Department of Education’s National Household Education Surveys (NHES) ask the question “Are you currently living with a partner?” Those NHES components are the Adult Education Survey, After-School Program and Activities Survey, the Early Childhood Program Participation Survey, the Parent and Family Involvement in Education Survey, and the School Readiness Survey. None of these surveys includes cohabitation as a part of the marital status response categories.

HHS surveys ask about cohabitation in a variety of ways. For example, the NSFG asks about cohabitation both in the marital status responses and as a question imbedded in the cohabitation/marital history. The National Survey of Children’s Health and the National Survey of Children with Special Health Care Needs ask several questions about the focal child’s parental living situation. Questions include, but are not limited to: “Are you and [sample child]’s [father/mother type] currently living together as partners?” and “Are [sample child]’s [mother type] and [father type] currently living together as partners?” The State and Local Area Integrated Telephone Survey (SLAITS) Influenza Vaccination Module for Children (IVMC) also asks: “Are you currently living with a partner?”

The Department of Justice conducts the Survey of Inmates in State and Federal Correctional Facilities (SISFCF). This is not a “household survey” in the usual sense because its sample is comprised of individuals in group quarters, in this particular case, correctional institutions. SISFCF asks a series of questions about the inmate’s household of residence prior to incarceration, including the persons with whom they were living and the inmate’s relationship to them. The list of responses includes “spouse,” “girlfriend,” and “boyfriend” as separate categories. It is worth noting that this approach might also be considered a roster but is not constructed in the usual way because the unit of reference is the inmate rather than the household.

The Department of Labor’s Bureau of Labor Statistics surveys, the NLSY79 and NLSY97, do not include cohabitation categories in their marital status responses, but do ask extensive questions about cohabitation. However, the questions are not quite identical. The NLSY97 asks questions about marriage and marriage-like relationships and then specifically asks “So just to check, are you still living with this partner in a marriage-like relationship where you have established one household together?” and “What describes your current relationship with [dating partner/spouse]?” with one response category being “We are currently living together but not married.” The NLSY79 asks “Are you currently living as a

partner with someone?” Both surveys ask cohabitation as well as marriage history questions.

Within the National Science Foundation, four surveys of the National Center for Science and Engineering Statistics collect household relationship information. In addition to sex and marital status, the National Survey of College Graduates (NSCG), the National Survey of Recent College Graduates (NSRCG), the Survey of Doctorate Recipients (SDR), and the Survey of Earned Doctorates (SED) also ask whether the respondent is “living in a marriage-like relationship.”

Since 2007, the Current population Survey (CPS) has included an “unmarried partner” category on the relationship to householder question, along with a direct question about cohabitation: “Do you have a boyfriend/ girlfriend or partner in the household?” Starting in 2014, the redesigned Survey of Income and Program Participation also asks this question of respondents to find out whether they cohabited with a partner during the reference period.

The inclusion of cohabitation questions in Federal surveys allows researchers to identify diverse family patterns involving both opposite sex and same-sex partners. Whether or not a survey can be used to measure same-sex couple relationships depends on a number of factors including whether the survey collects data on the sex of partners and/or household members.

#### **F. Sex of Respondent and Household Members**

The inclusion of survey questions on sex of all household members allows for the measurement of same-sex households. Current household rosters and questions on marital status and cohabitation can be used to capture same-sex couple relationships only if the sex of the household members is collected. It is not possible to accurately determine sex based solely on a household member’s name.

Of the surveys included in this review some, but not all, ask the sex of the householder and other household members. Based on the questions reviewed, it is likely that 24 of the surveys have the potential to identify same-sex couples. All but one of these surveys would be able to distinguish between marital and cohabiting couples, as questions are asked about the sex of the householder and other household members and there are relationship questions as part of the roster and/or marital status questions.

However, just asking the questions may not be sufficient. Identifying same-sex couples may require the raw, unedited data. That is, the identification of same-sex couples is also dependent on the edit processes used in cleaning the data.

#### **G. Data Editing and Processing**

Federal agencies have varying protocols for editing and processing data. This can have consequences for the types of households that can be identified in surveys sponsored by different agencies. Further, different types of data files are available from the different Federal agencies. These data files include: raw data files, edited internal data files, edited restricted-use data files (available to the public through access agreements), and edited public-use data files. Editing strategies vary as well: relationships may be ‘silently’ edited in the processed data or the observation may be edited and then flagged. Editing flags allow data users to identify which cases were edited on a particular variable, and sometimes, the nature of the change made. In addition, for groups with characteristics that are comparatively rare, data may not be publicly available for smaller geographic units, such as census tracts or counties, due to statistical

reliability or confidentiality risk concerns.

In many surveys, household relationships are one of the first items edited: these measures are fundamental to other coding procedures. Depending on which dimension of the household relationship is edited, this process has different downstream consequences. For example, changes in household relationships may have consequences for family size and poverty calculations.

Data editing procedures can reflect legal definitions of relationships such as marriage. Until the past decade, no State granted marriage licenses to same-sex couples in the United States. Prior to 2000, the editing procedures for the decennial census recorded same-sex marriage as opposite-sex marriage. It was not until 2003 that Massachusetts became the first State in the Nation to legalize same-sex marriage. As of 2014, nineteen States and the District of Columbia have legalized same-sex marriage and other States are working toward similar legislation.

A cursory look at Census Bureau surveys demonstrates how the data editing process can affect the identification of same-sex couples. In these surveys, same-sex couples are identified through the household relationship and sex questions. If a person reports being of the same-sex as the householder and the husband/wife or unmarried partner of the householder, then they are identified as a same-sex couple. As of 2012, the Decennial Census, American Community Survey, Current Population Survey and Survey of Income Program Participation editing routines for the relationship item assign respondents who originally reported being the same-sex spouse of the householder to being a same-sex unmarried partner. The 2012 ACS included a flag (SSPA) which allowed same-sex married couples to be identified for the first time on the public use microdata sample (PUMS). The Current Population Survey, which also has a direct cohabitation question, allows for further identification of same-sex couples. The release of the preferred estimates<sup>11</sup> based on the 2010 Decennial Census marked the first time the Census Bureau released same-sex spousal data using decennial data (see [www.census.gov/hhes/samesex/](http://www.census.gov/hhes/samesex/)).

The National Center for Health Statistics employs different data processing rules for same-sex couples. Sex and marital status are not edited for same-sex couples. For example, the National Health Interview Survey (NHIS) does not currently contain any variable or recode that identifies same-sex partners, regardless of their marital status; however, same-sex couples can be identified through public data use files by checking whether spouses or partners are of the same-sex. It can then be inferred that these couples are either same-sex spouses or same-sex unmarried partners. Identifying same-sex couples this way can be problematic because there is an assumption of no error in reports of marital/relationship status and sex by the respondents. The internal NHIS data files do contain a family structure recode that identifies same-sex married and unmarried couples who do not have or live with children.

In other cases, agencies do not release public datasets identifying same-sex couples due to disclosure concerns. Many Federal surveys collect data under a pledge of confidentiality, meaning that the information is collected exclusively for statistical purposes, and no information will be published or released that would permit identification of a particular respondent. This requirement is specified in

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<sup>11</sup> As discussed in greater detail in Chapter 4, Census Bureau investigations into apparent discrepancies in estimates of the same-sex couple population as measured by the 2010 Census and the 2010 ACS (later attributed to differences in instrument formatting and automatic editing procedures) led to the subsequent release of preferred estimates.

several laws with penalties for unauthorized disclosure of confidential statistical information.<sup>12</sup> The release of microdata or data tables must therefore be examined to ensure that inadvertent disclosure of confidential information is prevented. Even when personal identifiers are stripped from the data, the combination of variables could lead to individual identification. The data resulting from the measurement of same-sex couples are likely to require careful consideration prior to release to prevent inadvertent disclosure. The relatively small number of cases, particularly in smaller data sets or geographic areas, may necessitate analysis through a Research Data Center or similar agreement that permits analysis of restricted data with a careful review of output to safeguard confidentiality.

For example, NCHS' National Health and Nutrition Examination Survey (NHANES) asks about relationships between individuals with a family, along with asking about the sex of each household member. The relationship of family members is not released in the NHANES public use files due to disclosure concerns, but the data are available in internal data files. Therefore, it is possible to obtain these data through a Research Data Center (RDC) proposal. Similarly, the National Survey of Family Growth (NSFG) collects a basic household roster comprising age, sex, and relationship of each household member to the reference person. Due to disclosure concerns, the household roster data (and thus, potential identification of same-sex partners, regardless of marital status) are not available on the public use files. The household roster in the NSFG interview is the only place where the respondent could report a same-sex marriage or cohabitation using the provided sex and relationship categories. The questions on marital/cohabiting status in the NSFG are based only on opposite-sex partnerships. Therefore, the data publicly released for those reported as married and cohabiting are limited to only opposite-sex couples. However, the roster data are available to researchers through the RDC.

## **H. Conclusion/Data Gaps and Limitations**

This chapter has provided an overview of the types of household relationship measures found in Federal surveys. Both commonalities and differences in the measurement of relationships are noted. Of the Federal surveys reviewed, those that incorporate the most detailed measurements include the NLSY79, SISFCF, NLSY97, SIPP and NCES. All of these surveys collect detailed household and relationship data. SISFCF is the most unique of the surveys reviewed. It collects retrospective household and relationship data from respondents in correctional institutions.

In comparing Federal surveys, several key measurement differences are observed that may affect survey estimates. These include: 1) variation in response categories (e.g., more categories and/or different category wording); 2) inconsistent measurement of relationship to child; 3) infrequent measurement of interrelationships of all household members; 4) inconsistent measurement of cohabitation; 5) infrequent measurement of sex for all household members; and 6) inconsistent inclusion of State of current residence and State where married. Such measurement variation can contribute to differences in estimates of family and household relationships across Federal surveys.

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<sup>12</sup> See Title V of the E-Government Act of 2002, the Confidential Information Protection and Statistical Efficiency Act of 2002 (CIPSEA) (Pub. L. 107-347, title V; 116 Stat. 2962, Dec. 17, 2002); Implementation Guidance for Title V of the E-Government Act, Confidential Information Protection and Statistical Efficiency Act of 2002 (72 FR 33362, 33368, June 15, 2007); and several agency-specific laws, such as 13 U.S.C. 9 (Census Bureau), 42 U.S.C. 1873 (National Science Foundation), and the Education Sciences Reform Act of 2002 (Pub. L. 107-279, Nov. 5, 2002; National Center for Education Statistics).

We also observe differences in data processing procedures across agencies. In some cases, these processing routines regarding household relationships relate to legal definitions, which have changed dramatically in a comparatively short period of time. In other cases, data access to less common household relationships is limited to avoid disclosure risk for persons who provided their information under a pledge of confidentiality.

Variation in agency priorities and interests shapes data collection efforts. We did not ask agencies for their exact rationales in how their questions were asked or why they chose their specific response categories. In addition, we did not collect information on the editing process for all of the surveys discussed in this chapter. There is a variety of reasons for the variation in household relationship data collected across Federal agencies. Different agencies have different traditions about how questions are asked, along with what answer categories are offered. By keeping with these question and answer categories, data users more easily are able to calculate trends over time. Nonetheless, over the years questions and answer categories have and will continue to change—either due to opportunities for innovation or as a result of new Federal or State policies.

## **Chapter 3. Uses of Relationship Information by Federal Agencies**

This chapter documents the uses of relationship and family data by Federal agencies and explores how these data contribute to agencies' missions, products, and funding distribution. Relationship data are the cornerstone of many Federal projects and processes; however, as seen in Chapter 2, surveys do not collect these data in a uniform manner across Federal surveys. While some of this variation is intentional and allows different programs to address diverse needs, some of it is unintended and leads to data gaps that Federal agencies must navigate.

The findings presented in this chapter come from a qualitative survey, described below and administered by the authors of this chapter. First, the method through which a frame of "user agencies" was created is provided. This is followed by a description of the data collection process. Findings are presented by department and agency, detailing data uses and gaps.

### **A. Frame Development**

Before Federal agencies could be surveyed on their uses of relationship data, a frame containing these agencies had to be created. The first decision regarding this frame dealt with its scope: whether non-Federal groups (such as academia, non-profit organizations, and private firms) that direct surveys of household relationships or conduct Federal household surveys would be included. Following a discussion, MRFHS decided that the scope of this report would be limited exclusively to Federal agencies.

Clearly, the most complete way of determining how Federal agencies use relationship data would be to survey every agency across the entire Federal government. However, given the time and resources available, a frame development method known as "snowball sampling" was adopted. Accordingly, an initial list of data users was derived from a condensed list of Federal statistical surveys which collect information about household relationships. From this list, personal knowledge was used to create an initial frame of known users of those surveys, yielding an initial frame containing 8 agencies or departments. Each of these was then contacted not only to administer the qualitative survey, but also to increase the frame through snowball sampling. The final frame includes 24 agencies in 10 departments. Please note that these 24 data user agencies do not completely overlap with the 10 data producer agencies discussed in Chapter 2.

### **B. Survey Design and Methodology**

A qualitative design for the survey was used, as more open-ended questions would provide deeper and broader information regarding the agencies' uses. A questionnaire that members could easily administer via email or telephone to agency contacts was designed. Appendix 2 contains the final questionnaire, which includes questions on uses and sources of relationship data, as well as data gaps or limitations and how agencies manage these limitations. The questionnaire also asks about the agency's or program's need for same-sex couples' data. The subgroup divided responsibility for the initial frame among its members. The members then interviewed agency contacts and followed up on other users identified through snowball sampling. The group members reported their findings to the team and completed results compilation and follow-up as necessary. The findings are detailed below by department.



## C. Results

By and large, the results from this qualitative study indicate that government agencies use household relationship and marital status data for descriptive, planning, and funding purposes. Descriptive purposes—seen largely in statistical agencies or offices such as the Bureau of Labor Statistics, the Census Bureau, and the Social Security Administration’s Office of Research, Evaluation, and Statistics—include providing the public and other agencies with detailed information and analysis about the state of and trends in areas including household composition and derivative measures (such as poverty, see *Box 5*). Planning purposes—exemplified below by the USDA’s Food and Nutrition Service, the Department of Commerce’s National Telecommunications Information Administration, and the Department of Defense—include agencies using household composition and derivative data to develop strategy for future program tests, changes, and management. This type of use also includes the production of various analytic and policy reports that agencies release to Congress and the public (see *Box 6*). Lastly, funding purposes—demonstrated by, for example, the Department of Housing and Urban Development’s Section 8 Housing Assistance and Community Development Block Grant programs, the Department of Education’s Title 3 funding program, and the Department of Health and Human Service’s Administration for Children and Family’s Community Service Block Grants program—use household composition and derivative data to allocate Federal funds to States, localities, and organizations.

It should be noted that the qualitative survey did not explicitly ask responding agencies about whether they consider data processing when selecting data sources or applying household relationship statistics in their work. However, follow-up conversations with some respondents indicated that it was not clear how data processing edits applied by statistical agencies impact the user agencies’ work and products. Therefore, this chapter likely underestimates (to some degree) the type and range of impact of such processing.<sup>13</sup> The programmatic agencies largely trust the statistical agencies to provide them with high-quality data and appear to assume that any production procedures are thoroughly reviewed and tested before data are released.

### 1. *Department of Agriculture*

The Economic Research Service (ERS), the USDA’s research arm, analyzes trends in the distribution of Supplemental Nutrition Assistance Program (SNAP, formerly known as food stamps) funds. The SNAP analyses use relationship, income, and program participation data from Census Bureau and Bureau of Labor Statistics surveys. These data include Survey of Income and Program Participation (SIPP), Current Population Survey (CPS), American Community Survey (ACS), and American Time Use Survey (ATUS) information on the relationship of individuals to the reference person, as well as the identification of the mother (from SIPP). The SNAP legislation identifies as a household a unit that eats and prepares food together. Therefore, ERS and the Food and Nutrition Service (FNS, which administers SNAP) use subfamily identifications to closely estimate the SNAP household. A resulting data limitation is that ERS and FNS have a difficult time extrapolating multi-adult households into subfamilies. The current SIPP has this needed information, but CPS and ACS do not.

In addition to administering SNAP, the FNS releases a series of reports known as “The Food Security

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<sup>13</sup> As discussed later in this chapter, removing the edit for the CE would impact the sample used for CPI-E weights and the DOD cost-of-living adjustments.

Studies.<sup>14</sup> The analysis behind these reports uses the CPS Food Security supplement for the relationship to the reference person and the National Health and Nutrition Examination Survey (NHANES) confidential household roster relationship information.

The USDA's Center for Nutrition Policy and Promotion releases an annual report on the cost of raising a child.<sup>15</sup> These "Expenditures on Children by Families" reports use BLS Consumer Expenditure (CE) data for calculations, with household relationship as a key variable. Specifically, the analysis uses CE data on married families and single-parent households: USDA examines only couples classified as married in the CE data and single parents with no other adults present in the household. States use these USDA cost data to allocate child support and other transfer payments.

## *2. Department of Commerce*

Within the Department of Commerce, the Census Bureau not only produces data on families and relationships (as detailed in Chapter 2) but also uses those data for a variety of mandatory and programmatic purposes. Its Population Estimates Program uses American Community Survey (ACS) and Decennial Census relationship and marital status data as calculation inputs. According to Title 13, the Census Bureau officially updates the Population Estimates once a year, providing the estimated national, State, and sub-State populations on July 1.<sup>16</sup> Within the Federal statistical system, these estimates assist in constructing population weights for a number of surveys, including the ACS, CPS, and CE. Various programmatic agencies also use the estimates in their funding formulas.

The Census Bureau also uses household relationship and marital status data from the ACS, Decennial Census, CPS, and SIPP in the design of other post-censal demographic surveys. Primarily, these data allow the Census Bureau to stratify and select primary sampling units in various stages of sampling.<sup>17</sup> The poverty oversample of the SIPP itself relies on household relationship data from the ACS and the Decennial Census.

The Census Bureau and Department of Health and Human Services official poverty measurement<sup>18</sup> uses household relationship data from the ACS and CPS to assign cases to various poverty thresholds. Additionally, the Census Bureau uses CE data as part of the calculations going into the Supplemental Poverty Measure (SPM).<sup>19</sup> The data sampled for the SPM use the number of adults present in the household regardless of marital status.

The National Telecommunications and Information Administration and the Federal Communications Commission use household relationship data (as well as the derivative poverty data) to map and plan policies to expand universal telephone and broadband access.<sup>20</sup>

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<sup>14</sup> See <http://www.fns.usda.gov/Ora/menu/Published/FoodSecurity/FoodSecurity.htm>

<sup>15</sup> See <http://www.cnpp.usda.gov/expendituresonchildrenbyfamilies.htm>

<sup>16</sup> 13 USC 181(a).

<sup>17</sup> 13 USC 182.

<sup>18</sup> 13 USC 141 and 42 USC 9902(2).

<sup>19</sup> 13 USC 193.

<sup>20</sup> 47 USC 151 and 254.

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*Box 5. How the Census Bureau and HHS Measure Poverty*

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Following OMB's Statistical Policy Directive 14, the Census Bureau calculates a number of income thresholds that take family size and composition into account. The poverty thresholds are for the Nation and do not vary by geographies such as States or metropolitan areas. All households in a survey are placed in one of 48 possible household composition/family size categories and are categorized as either in-poverty or not in-poverty depending on that cell's threshold (please see the 2012 thresholds, for example, at <http://www.census.gov/hhes/www/poverty/data/threshld/thresh12.xls>). The original thresholds were created in 1964, and were based largely on food budgets. The Census Bureau updates the thresholds annually using the Consumer Price Index for All Urban Consumers (CPI-U). The official poverty rate uses data from the Current Population Survey and its Annual Social and Economic Supplement. Poverty is also calculated using the American Community Survey, though a slightly different adjustment is used due to the monthly panel structure of the ACS.

For administrative purposes, the Department of Health and Human Services releases official poverty guidelines annually. These guidelines are simplified derivatives that consider only family size. HHS releases guidelines for the contiguous 48 States, for Alaska, and for Hawaii, usually in January. Besides HHS, a number of programs across other Federal departments use these guidelines in the administration of their programs. For more information on these guidelines, please see <http://aspe.hhs.gov/poverty/faq.shtml>.

### *3. Department of Defense*

The Department of Defense (DOD) uses survey information they collect or obtain under contract on service members, their spouses, and their children to measure and determine cost-of-living allowances. Unmarried partners are not included in the analysis. The Defense Department also uses special tabulations from the BLS Consumer Expenditure Survey data for service members, their spouses, and their children to calculate expenditure shares. Additionally, the Defense Travel Management Office uses three surveys (the CE, a DOD survey of overseas personnel, and a contractor survey of within-the-U.S. service population) to determine Cost-Of-Living Adjustment (COLA) payments and travel allowances. The surveys do not ask about unmarried partners, because they were designed under policies that limited allowances to married partners.

### *4. Department of Education*

Across the Department of Education, both household relationship and marital status data serve a number of purposes. Title 1 of the Elementary and Secondary Education Act (known as the No Child Left Behind Act in its current authorization) provides funding for schools with disproportionately large numbers of students in poverty.<sup>21</sup> The National Center for Education Statistics (NCES) processes ACS household relationship data (alongside income and age data), so that the Department can allocate funds to school districts.

Title 3 of the Elementary Secondary Education Act provides funding for school districts with disproportionately large populations of immigrant and limited English language proficiency students.<sup>22</sup> The Department bases the allocation of these funds on both marital status and household relationship data from the ACS.

Other provisions of the Elementary and Secondary Education Act also rely on various sources of household relationship and marital status data, primarily from the Census Bureau. For instance, some

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<sup>21</sup> P.L. 107-110, Section 1124; 20 USC 6333, 6334, 6335, and 6337.

<sup>22</sup> 20 USC 6821, 6841, and 6974 and 20 USC 9224.

funds are allocated based on the population of school-aged children or number of children per housing unit either in or not in poverty. These funding decisions rely on models using household relationship and marital status data of a reference person.

## 5. Department of Health and Human Services

The Department of Health and Human Services (HHS) uses information on household relationships and marital status for a number of regulatory, statistical, and programmatic purposes. Sources of data for this information include the Census Bureau's American Community Survey (ACS), the Decennial Census, the Current Population Survey (CPS) Annual Social and Economic Supplement (ASEC), as well as HHS population surveys and grantee reporting requirements. Relationship information is used for the poverty guidelines, which are updated periodically in the *Federal Register* by HHS.<sup>23</sup> The guidelines are a simplification of the poverty thresholds updated each year by the Census Bureau and are used for administrative purposes, such as determining eligibility for certain Federal programs. Specific uses of relationship data by the HHS operating (or program) divisions are provided below.

The Administration for Children and Families (ACF) uses information on household relationships and marital status as a measure for the High Performance Bonus Awards program under the Temporary Assistance for Needy Families (TANF) program.<sup>24</sup> The agency also uses these data to investigate matters related to child welfare and for funding purposes by the Low Income Home Energy Assistance Program (LIHEAP).<sup>25</sup> For the administration of the Community Services Block Grant program, the ACF uses relationship information for formula allocations, specifically for Community Food and Nutrition grants to States.<sup>26</sup> Information on relationships and marital status also serves programmatic purposes under the Older Americans Act to distinguish households in which a grandparent has primary responsibility for a grandchild or grandchildren.<sup>27</sup>

The Health Resources and Services Administration (HRSA) uses relationship information to designate Health Professional Shortage Areas, which takes into consideration the ratio of available health professionals to the population and other indicators of need. HRSHA also uses relationship information to designate Medically Underserved Populations, which are populations with shortages of personal health services. Only such communities are eligible for certain HHS programs, such as the National Health Service Corps, Community Health Centers, and Rural Health Clinics.<sup>28</sup> Additionally, HRSA's Maternal and Child Health Bureau uses relationship information in determining populations to be served and funding allocations to States for the Title V Maternal and Child Health Block Grant.

The National Center for Health Statistics (NCHS) uses relationship information in agency statistical programs related to the collection of vital, social, and health statistics, and as a denominator for computing certain vital statistics rates.<sup>29</sup> As described in Chapter 2, NCHS collects information on household relationships and marital status to aid its analysis of health status, health-related behaviors,

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<sup>23</sup> Under the authority of 42 USC 9902(2).

<sup>24</sup> 45 CFR 270.4(f).

<sup>25</sup> 42 USC 621(c) and 42 USC 8629(a), respectively.

<sup>26</sup> 42 USC 9908(b) and (c)(1)(A)(i), 9917(b)(1) and (2) and 9922(b).

<sup>27</sup> 13 USC 141, which explicitly calls for the use of decennial census or American Community Survey data for this information.

<sup>28</sup> 42 USC 254(b)(3)(A) and (B), 42 USC 254e(b) and (d) and 42 USC 254f-1, respectively.

<sup>29</sup> 42 USC 242k(b)(h) and (1).

access to care and insurance coverage, and other health topics. For example, marital status is an important predictor of having health insurance coverage for certain subgroups of the population, in all poverty status groups.

The National Institutes of Health (NIH) uses relationship data across a number of its constituent institutes and their programs. For instance, the National Institute on Aging and the *Eunice Kennedy Shriver* National Institute of Child Health and Human Development use relationship information for programmatic purposes in the administration of research grants investigating determinants and consequences of fertility and other population characteristics.<sup>30</sup> The National Institute of Mental Health uses relationship information to support research grant funding activities on service delivery for children.<sup>31</sup>

The Office of Public Health and Science uses relationship data for programmatic purposes in funding demonstration and research grants for targeted populations.<sup>32</sup>

The Administration on Aging, which is part of the Administration for Community Living, facilitates the use of relationship data by State and local agencies in order to determine segments of the older population that have the greatest need for certain services under the Older Americans Act category of “greatest social need.”<sup>33</sup>

The Centers for Medicare and Medicaid Services uses information on household relationships for estimating the cost of practice indexes and other types of payments adjustment and analyses.<sup>34</sup> Furthermore, its Current Medicare Beneficiary Survey requires information on relationships for analytic and statistical purposes.

The Substance Abuse and Mental Health Services Administration (SAMHSA) use information on household relationships and marital status from the ACS and Decennial Census to improve the sample design, weighting, and small area estimation procedures for the National Survey on Drug Use and Health (NSDUH).<sup>35</sup>

The Agency for Healthcare Research and Quality uses household relationship information collected by the Medical Expenditure Panel Survey (MEPS) to research medical cost expenditures, health insurance coverage, health service utilization, and access to care.

## 6. *Department of Housing and Urban Development*

The Department of Housing and Urban Development (HUD) uses both household relationship and marital status in the administration of a number of block grant programs and analytical products. As noted with other departments, the major way HUD uses these data is in the form of poverty estimates, which use household composition as a key variable.

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<sup>30</sup> 42 USC 241, 285e-1(b) and 285g.

<sup>31</sup> 42 USC 241 and 285p.

<sup>32</sup> 42 USC 300a-2.

<sup>33</sup> 42 USC 3002 (28)-(30), 3025(a)(1)(E) and (2)(E), and 3026(a)(1).

<sup>34</sup> 42 USC 1395w-4(e)(1).

<sup>35</sup> 42 USC 290aa-4.

For instance, with the Internal Revenue Service (IRS), HUD uses poverty estimates and household size to establish Qualified Census Tracts and Difficult Development Areas for the Low Income Housing Tax Credit Program.<sup>36</sup> In addition to the tax credits available through this program, the Difficult Development Area designation allows local and State governments to apply for other sources of HUD funding. Other agencies across the Federal government also use these Qualified Census Tracts, such as the Small Business Administration in their Historically Underutilized Business Zone (HUBZone) program that provides small businesses extra opportunities to compete for Federal contracts.<sup>37</sup>

One of the largest HUD programs that uses poverty estimates and household composition is the Section 8 Housing Assistance Program.<sup>38</sup> HUD receives special tabulations of ACS data comparing income, housing cost, and household size. It then uses these special tabulations to calculate the income limits for Section 8 program participation and the Fair Market Rents that determine the amount of assistance a family can receive. Like the previously Qualified Census Tracts mentioned, other Federal agencies use these Income Limits and Fair Market Rents to administer their programs. For instance, the USDA's Rural Development Service uses the Fair Market Rents to establish rates for rural housing assistance programs.

Other HUD programs that use household composition, poverty, and marital status data include the Community Development Block Grant, the Comprehensive Housing Affordability Strategy, and the HOME Investment Grant programs.<sup>39</sup>

## *7. Department of Justice*

The Bureau of Justice Statistics (BJS) uses relationship data in their National Crime Victimization Survey program to produce detailed family and household-based analysis of nonfatal criminal victimizations.

## *8. Department of Labor*

The Bureau of Labor Statistics, within the Department of Labor, both produces and uses data on relationships, primarily for descriptive and analytical purposes. Many of the agency's uses aim to produce and facilitate analytical research on a variety of topics. For instance, both Federal and academic researchers studying how individuals allocate time use the American Time Use (ATUS) data. Marital status is a key identifier in this research and in published tabulations. ATUS currently uses edited CPS data to identify married couples.

Consumer Expenditure Survey (CE) data on marital status are used by the Consumer Price Index (CPI) for cost weights, as well as by the Department of Defense, the IRS, Congressional researchers, and by the Census Bureau for the Supplemental Poverty Measure. The CPI itself does not collect relationship data in its household survey used to measure rent and owners' equivalent rent inflation. The CPI uses CE data for married households based on age to determine when a subset of the data meets the definition for

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<sup>36</sup> 26 USC 42.

<sup>37</sup> 15 USC 648.

<sup>38</sup> 42 USC 1437.

<sup>39</sup> 42 USC 5302, 42 USC 12705, and 42 USC 12747, respectively.

the CPI-Experimental<sup>40</sup> for the elderly.

## *9. Social Security Administration*

Overall, The Social Security Administration uses the Current Population Survey (CPS) and the Survey of Income and Program Participation (SIPP) for descriptive analysis. The CPS is also used for benefit allocation and the SIPP is also used for program evaluation. The actuaries use the decennial census for program costs, the CPS for children per family, and the American Community Survey (ACS) for marital status data. The Social Security Act<sup>41</sup> requires the Board of Trustees to annually report to Congress on the actuarial (financial) status of Old-Age and Survivors Insurance (OASI) and Disability Insurance (DI) Trust Funds. Social Security benefits reflect lifetime earnings of insured workers and auxiliary benefits provided to their dependents as spouses and survivors. The Office of the Chief Actuary (OCACT) prepares the projections for this legally-mandated report using household survey data on family relations, including marriage, divorce, and children. OCACT notes that needed data are not available on marriage in the last 12 months (and age at marriage), divorce in the last 12 months (age at marriage and length of marriage) and spouse's current age.

The Office of Retirement Policy (ORP) in the Office of Retirement and Disability Policy (ORDP) prepares estimates of the impact of alternative reforms on the Social Security program with respect to access to and amount of benefits. To do this, ORP uses household survey data on family relationships of insured workers and their families. ORP notes data limitations regarding estimates of grandparents, same-sex couples, and parents of survey respondents as well as how many children a person has and if he or she is residing in the household in a given year. There also is insufficient information on Social Security benefits for children under age 15, the characteristics of adult parents, and cohabiting partners.

The Office of Research Evaluation and Statistics (ORES) in ORDP prepares analyses of the economic well-being of beneficiary populations, projections of future beneficiaries, and effects of alternative Social Security rules through micro-simulation modeling. The main data limitation faced by ORES is the lack of complete marital histories. Incomplete information on past marriages can be obtained using restricted-use SIPP data. A lack of data on same-sex couples is a concern for modeling. Ideally, ORES would have access to survey data which record couples' legal status under State law. However, even if these data were available, the sample sizes of same-sex couples with useable marital histories would likely be limited.

## *10. Department of Transportation*

A number of programs administered by the Department of Transportation use household relationships in policy and funding decisions, particularly in the form of poverty numbers released by the Census Bureau and the Department of Health and Human Services. For example, the Federal Transit Administration's (FTA) Job Access and Reverse Commuting Program provides funds to States and transportation authorities that plan for and provide reverse commuting incentives for impoverished populations that live outside (but work inside) a city core.<sup>42</sup> Other FTA programs use household

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<sup>40</sup> The CPI-Experimental pertains to the population where the reference person is aged 62 or over, or the spouse of the reference person is aged 62 or over.

<sup>41</sup> P.L. 74-271, codified in 42 USC Chapter 7.

<sup>42</sup> 49 USC 5316.

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#### *Box 6. Federal Reports Using Household Relationship and Marital Status Data*

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In addition to the uses mentioned throughout this chapter, it is important to note that many Federal agencies use household relationship and marital status data to generate reports for audiences from Congress to the general public. Some examples of these reports are:

- The Impact of Marital and Relationship Status on Social Outcomes for Returning Prisoners (HHS, ASPE)
- Homelessness: Programs and the People they Serve (HUD, PD&R)

It is also quite important to note that statistical agencies such as the Census Bureau and the National Center for Health Statistics, which collect household relationship and marital status data, publish a number of informational reports and analytic papers on these topics. For example:

- First Marriages in the United States: Data from the 2006-2010 National Survey of Family Growth (NCHS)
- Employment Characteristics of Families—2011 (BLS)
- To see table packages, reports and conference papers on these topics, see the Census Bureau's Families and Living Arrangements website at: <http://www.census.gov/hhes/families/>; the Marriage and Divorce website at: <http://www.census.gov/hhes/socdemo/marriage/>; and the Same-Sex Couples website at: <http://www.census.gov/hhes/samesex/>. For example, the Households and Families: 2010 Census Brief: <http://www.census.gov/prod/cen2010/briefs/c2010br-14.pdf>; America's Families and Living Arrangements: <http://www.census.gov/hhes/families/data/cps.html>; Number, Timing and Duration of Marriages and Divorces: 2009: <http://www.census.gov/prod/2011pubs/p70-125.pdf>; and Marital Events of Americans: 2009: <http://www.census.gov/prod/2011pubs/acs-13.pdf>.

relationship to model family size and transportation demand, including the Metropolitan and Statewide Planning Program and the Urbanized Area Formula Program.<sup>43</sup>

The Bureau of Transportation Statistics (BTS) uses household composition and poverty in a number of analyses to model the maintenance and expansion needs of the transportation infrastructure.<sup>44</sup>

The Federal Highway Administration (FHWA) uses household relationship data to model household composition for the requirement of the Highway Safety Act. For instance, the FHWA provides simulation and model data from the Transportation Analysis Simulation System to States so that they can submit planning documents that allow them to compete for various DOT funding sources.<sup>45</sup>

#### *11. Department of the Treasury*

In addition to the Low Income Tax Credit program mentioned above, the Internal Revenue Service (IRS) uses CE data based on the number of people in the household and their total income to determine sales tax standard deductions. The number of people present—regardless of marital status—determines the size of the household. The reported income is for the entire household.

#### **D. Data Gaps and Limitations**

Overall, very few agencies noted data gaps or limitations. Research showed three limitations:

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<sup>43</sup> 49 USC 5303-5305 and 49 USC 5307, respectively.

<sup>44</sup> 49 USC 111.

<sup>45</sup> 23 USC 134 and 135.



- 1) The largest limitation, mentioned by a number of agencies, is that the surveys that provide the timeliest data at the smallest geographies (such as the CPS and the ACS) do not include the full range of possible household relationships. For instance, the Census Bureau's condensed coding for subfamilies in the ACS requires more assumptions on the part of programmatic agencies than do other coding methods to assign subfamily relationships among participating households, since the questionnaire does not directly ask all adults to identify their spouses and parents. However, all agencies were able to obtain the data they needed, in some form, from the various Federal statistical agencies.
- 2) The second gap noted was between the current and potential uses of same-sex couple and household data for funding allocation and research. At the time of the study, nearly all the agencies surveyed who need marriage data for funding use noted that because of then-current Federal law—namely the Defense of Marriage Act<sup>46</sup>, or DOMA—they could not use same-sex data for allocating funds. However, most did want the data for analytical purposes. At the time, they noted that if DOMA were overturned in the future, they would need same-sex household and marital status data to administer their programs accurately. Now that key provisions in DOMA have been overturned and many Federal marriage benefits are now available to legally-married same-sex couples, programmatic agencies across the government are re-examining their data needs and the resulting data gaps they may have. For instance, because the relationship status of same-sex couples was edited from spouses to unmarried partners in Census Bureau surveys and censuses, agencies using these data (including those that allocate funds based on marital status) are unable to identify and analyze such households. Research on both improving the validity of the marital status and household relationship measures, as well as on the effects of this and other editing procedures, is discussed in the next chapter of this report.
- 3) The final gap noted in relationship data is the relative lack of complete information on marriage length. The Social Security Administration qualifies divorced potential benefit recipients for spouse/survivor benefits based on the length of the marriage. Actuaries need information on marriage and divorce in the last 12 months and spouse's current age. Without underlying source data, the SSA faces limits on accurately estimating future benefit recipients. This concern has been addressed as of fall 2013, when the first 5-year ACS data for these characteristics became available at all relevant levels of geographic detail.

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<sup>46</sup> P.L. 104-199, 28 USC 1783C.

## **Chapter 4. Research on Measuring Household Relationships**

In this chapter, we summarize recent research on measuring relationships in Federal demographic surveys. Most of the research was sponsored by Federal agencies and much of it focuses on measurement of same-sex couples or families that include same-sex parents. Since its inception, much of the committee's discussion has revolved around the measurement of same-sex couples, as this subpopulation is specifically mentioned in the Department of Commerce letter to OMB requesting the committee's establishment (See Appendix 3). Although we focus predominantly on relationships within households, members also discussed the topic of measuring less traditionally-defined relationships between households. As such, while this topic was not the central focus of the committee, we point to several ethnographic studies conducted prior to the establishment of the committee that relay findings from this area.

As noted in Chapter 3, agencies use a variety of household definitions for analysis depending on the program implemented. Until recently, the Defense of Marriage Act (DOMA) prevented treating same-sex married couples as married for mandated program purposes. For this reason, many programs did not collect data on same-sex married couples despite the interest for non-mandated analysis. However, with the recent Supreme Court decision overturning the provision in DOMA that prevented same-sex married couples from receiving the Federal benefits offered to opposite-sex married couples, there is a greater need to accurately measure same-sex married households within many of the Federal collections. As a result, a number of agencies have undertaken research to address this issue. We summarize five related topic areas of survey measurement research on relationships: relationship of household members to the householder, relationship of household members to children in the household, measurement of marital status, measurement of cohabitation status, and measurement of non-traditional or "complex" households. We discuss research to ascertain the accuracy of current measures, research to improve measures, and development and testing of new alternatives.

### **A. Relationship to Householder**

In the case of the American Community Survey (ACS) and decennial census, same-sex couples are measured by way of two questions: relationship to the householder and sex. The current categories available for couples to describe an intimate relationship include "husband or wife" and "unmarried partner." Several studies have speculated that same-sex couple estimates based on these two items are inflated due to accidental mismarking on sex by a very small proportion of opposite-sex married couples. As opposite-sex couples are larger in number than same-sex couples, this would result in a large overcount of same-sex couples (O'Connell & Gooding, 2006) (Black, et al., 2007) (Gates & Steinberger, 2009) (DeMaio, et al., 2013).

Research around the accuracy of measuring same-sex couples comes primarily from the ACS. Using data from the 2005-2008 ACS, the Census Bureau conducted research to assess several operational and questionnaire design changes made to the survey. According to O'Connell et al., a decline in the number of same-sex spouses was reported between the 2007 and 2008 ACS. (O'Connell, et al., 2010) This appears to be due to improvements in processing, edit rules, and the format and layout of the questionnaire. Thus, the decline in 2008 estimates is thought to reflect an improvement in data quality. Two practical recommendations coming from the study and relevant to a paper-administered questionnaire include: 1) using a sequential layout rather than a grid; and 2) for questions that have two

response categories, arranging the categories horizontally rather than vertically to reduce mismarks.

A second study attempted to assess the accuracy of same-sex couple estimates from the 2010 Census. In particular, why were estimates of same-sex couples, especially same-sex spousal households, substantially higher in the census compared to the 2010 ACS (349,000 same-sex spousal households in the census versus 152,000 in ACS)? What did this say about the quality of estimates coming from the 2010 Census? To answer this question, the 2010 Census and 2010 ACS same-sex couple data were compared by mode and phase of data collection. (O'Connell & Feliz, 2011) The study also evaluated the quality of data using a statistical "names directory" indicating the probability that the sex for a particular name had been incorrectly marked. According to the study, about 28 percent of 2010 Census same-sex couple households were the result of mismarks and were probably opposite-sex couples. The study concluded that the grid-based questionnaire format of the 2010 Census nonresponse follow-up form mostly contributed to the overcounts. Conversely, the presence of automated edits in the telephone and personal-visit data collection phases of the ACS appeared to greatly reduce same-sex couple over-reports. These discoveries led the Census Bureau to release a set of 2010 Census State-level "preferred estimates" for same-sex households (see [http://www.census.gov/newsroom/releases/archives/2010\\_census/cb11-cn181.html](http://www.census.gov/newsroom/releases/archives/2010_census/cb11-cn181.html)).

A second hypothesis behind the higher number of same-sex spousal households in the census is that more *unmarried* same-sex couples may be adopting the term husband/wife to describe their partners. However, a study sponsored by the Williams Institute soon after the 2010 Census reported a high degree of consistency in how same-sex couples identified their relationship status on the census form and their legal relationship status in their State of residence (Gates, 2010). Nearly all individuals who had no legal relationship reported using unmarried partner on the census form (97 percent), and only 16 percent of couples in civil unions or registered domestic partnerships selected husband/wife.

A more recent study of ACS data examined the consistency between same-sex couples' reporting of relationship and marital status (unlike the Decennial Census, the ACS also collects marital status for those 15 and older). (Lofquist, 2012) Substantial consistency was found between same-sex couples' responses to the relationship and marital status questions. That is, couples who identified as unmarried partners tend to report themselves as something other than "now married," and couples who report themselves as spouses tend to report being "now married" (even if they reside in a State that does not recognize same-sex marriage).

These survey findings are echoed by focus groups with individuals from same-sex couples. Bates et al. reported that respondents perceive the census relationship question to be asking about a legal status and, consequently, answers on census forms tend to align with legal partner status. (Bates, et al., 2010) Other key findings included: 1) respondents desire new categories to reflect other legal unions for same-sex couples (e.g., civil unions and domestic partnerships); 2) respondents desire to move the "unmarried partner" category up in the list; and 3) many interpreted the term "partner" to apply more to same-sex intimate relationships; however, opposite-sex unmarried couples were still comfortable selecting "unmarried partner" as their relationship category.

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**Box 7. Census' Proposed Alternative Relationship Questions**

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**How is this person related to Person 1? Mark (X) ONE box.**

- |   |  |
|---|--|
| <input type="checkbox"/> Opposite-sex husband/wife/spouse | <input type="checkbox"/> Grandchild                    |
| <input type="checkbox"/> Opposite-sex unmarried partner   | <input type="checkbox"/> Parent -in-law                |
| <input type="checkbox"/> Same-sex husband/wife/spouse     | <input type="checkbox"/> Son-in-law or daughter-in-law |
| <input type="checkbox"/> Same-sex unmarried partner       | <input type="checkbox"/> Other relative                |
| <input type="checkbox"/> Biological son or daughter       | <input type="checkbox"/> Roomer or boarder             |
| <input type="checkbox"/> Adopted son or daughter          | <input type="checkbox"/> Housemate or roommate         |
| <input type="checkbox"/> Stepson or stepdaughter          | <input type="checkbox"/> Foster child                  |
| <input type="checkbox"/> Brother or sister                | <input type="checkbox"/> Other nonrelative             |

Based on these qualitative studies, the Census Bureau developed two alternative relationship questions for cognitive testing. Both versions were tested in cognitive interviews conducted by the Census Bureau (DeMaio & Bates, 2011) and one version was tested in interviews conducted by the National Center for Health Statistics (NCHS) (Ridolfo, 2011). In both

studies, most respondents mapped their answers according to legal partnership status. The relationship question recommended for future quantitative tests is presented in Box 7. In addition to testing well during the cognitive interviews, this version should reduce the occurrence of different-sex couples misreporting sex because of the added sex check in the delineated spouse and partner categories. The 2013 American Housing Survey (AHS) included an interviewer-administered, split panel test of this revised relationship question (and marital status question—see below) with a nationally-representative sample of approximately 160,000 households. Detailed results of the experiment will be documented in a separate, joint Census Bureau and HUD report (forthcoming). However, at the time of this writing, we can report that unit nonresponse was no different between the test and control panels. Further, the item nonresponse rate (that is, the proportion who didn't know the answer or refused to provide it) for the relationship item was very low when using both the new (0.4 percent) and control (0.3 percent) versions.

## **B. Relationship to Child Research**

In some Federal studies, the household is rostered in relation to a reference child rather than an adult. This is often done to look at the reference child's home environment. In these measurements, it is possible to have multiple people serving as a parent or guardian to the child. Historically, surveys attempted to identify a mother and father in the household. Recent qualitative work sought to broaden the measure to include other combinations, such as same-sex parents, a biological parent and grandparent co-raising a child, and a mother and unmarried partner raising a child. (Grady & McPhee, 2011) This work led to the development of a series of parent 1 / parent 2 living in household items shown in box 8. These items were tested during the National Household Education Survey (NHES) field test, a large scale test that took place January-May 2012. The results indicated that the Parent 1 / Parent 2 model yielded higher identification of same-sex parent and grandparent-led households. It also reduced item non-response (Grady & Redford, 2012).

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*Box 8. Alternative Relationship to Child Questions*

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**PARENT 1 LIVING IN HOUSEHOLD** *Answer these questions about yourself if you are the child's parent or guardian.*

*If you are not the child's parent or guardian, answer these questions about one of this child's parents or guardians living in this household.*

**Is this parent or guardian the child's...**

Biological parent  
Adoptive parent  
Stepparent  
Foster parent  
Grandparent  
Other guardian

**Is this person male or female?**

Male  
Female

**PARENT 2 LIVING IN HOUSEHOLD** *Answer these questions about a second parent or guardian living in the household.*

**Is there a second parent or guardian living in this household?**

No → skip these items  
Yes

**Is this person the child's...**

Biological parent  
Adoptive parent  
Stepparent  
Foster parent  
Grandparent  
Other guardian

**Is this person male or female?**

Male  
Female

### **C. Marital Status Research**

Within-household relationships are also defined by cohabiting couples' legal relationship statuses. The ACS captures this by asking marital status of persons 15 years old or over. Categories include: now married, widowed, divorced, separated, and never married. Focus groups with participants from same-sex couples revealed key insights to this traditional measure (Bates, et al., 2010). First, participants usually interpreted the question to be asking about a legally-defined marriage sanctioned by the State. However, same-sex couples that had been legally married anywhere tended to select "now married" even when the marriage was not recognized by their State of residence. Finally, respondents complained the current categories do not accommodate same-sex couples who are not legally married but wish to indicate a committed relationship status. For example, couples who could not be legally married are forced to choose "never married" or a category describing a past opposite-sex marital status. Likewise, couples in domestic partnerships or civil unions have no option to indicate so.

Based on this work, the Census Bureau developed two new versions of the ACS marital status sequence. Both versions added a measure to reflect registered domestic partnerships/civil unions. Both versions were tested in cognitive interviews conducted by the Census Bureau (DeMaio & Bates, 2011) and one version was tested in interviews conducted by the National Center for Health Statistics (NCHS) (Ridolfo, 2011). Results indicated that although respondents reacted positively to the new relationship category, both gay and straight respondents had misperceptions and confusion around the meaning of "domestic partnership or civil union." There was also some sensitivity toward the new category in traditionally conservative geographic areas. Based on this research, the Census Bureau has recommended that agencies conduct large scale quantitative tests using the version in Box 9 as a starting point. As described above, the 2013 AHS included an interviewer-administered, split panel test of the revised marital status question (as well as the revised relationship question) with a nationally-

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*Box 9. Alternative*

*Marital/Cohabitation Status Sequence*

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1. ***What is this person's current marital status?*** Mark (X) one box.  
☐ Now Married – Skip to Q3.  
☐ Widowed  
☐ Divorced  
☐ Separated  
☐ Never married
2. ***Does this person have a boyfriend, girlfriend, or partner in this household?***
3. ***Is this person currently living in a registered domestic partnership or civil union?***

representative sample of approximately 160,000 households. Detailed results of the experiment will be documented in a separate, joint Census Bureau and HUD report (forthcoming). However, at the time of this writing, we can report that unit nonresponse was no different between the test and control panels. In addition, the item nonresponse rate was not statistically different in the experimental (1.5 percent) versus the control panel (1.6 percent).

#### **D. Cohabitation Item Research**

Currently, cohabitation is captured in the decennial census and ACS through the question on relationship to the householder. Respondents can select the category for “unmarried partner” to indicate a person is in a romantic relationship with the householder. Infrequently, some other Federal surveys (e.g., CPS) have measured cohabitation status using a direct question. Hunter (Hunter, 2005a) discusses difficulties in measuring cohabitation that current questions do not adequately address. Terminology presents a key challenge. Cohabiting couples may be undercounted if some respondents do not recognize the language used in question wording (Hunter, 2005b).

Two studies identify differences in cohabitation term acceptance. The phrase now used in Federal surveys—“unmarried partner”—is better recognized by higher-income respondents than those who earn less (Hunter, 2005a). Opposite-sex couples more often endorse the terms “girlfriend/boyfriend” (Hunter, 2005b), whereas lesbian/gay couples more often use “partner.” Same-sex couples, however, have some sensitivity around the term “unmarried partner,” as it can suggest free choice of marital status (Hunter, 2005a) (Hunter, 2005b). Hunter recommends developing wording sensitive to diverse interpretations in the population, and also suggests reconsidering the term “unmarried partner.” However, she is unable to suggest a single best alternative.

A second issue is where to ask about cohabitation status. Two options are identified (Hunter, 2005a). The first includes a category for “unmarried partner” in the marital status question. The second measures cohabitation using a separate question. Both alternatives offer an advantage over the relationship to householder question. Whereas this question only identifies cohabiting couples when one member is the householder (Hunter, 2005b), the alternatives capture other types of cohabiting couples.

Two studies evaluated the measurement of cohabitation status as part of the marital status question versus in a separate item. The overall aim was to develop a direct cohabitation question that is sex-

neutral, non-offensive, and generally applicable. Hunter first conducted cognitive testing through semi-structured interviews with 19 cohabiting respondents (Hunter, 2005b). Following this, question wording for cohabitation status was quantitatively tested as part of the 2004 Questionnaire Design Experimental Research Survey (QDERS). (O’Connell, et al., 2005)

Both studies conclude that the separate item for cohabitation status is preferable to the combined marital status/cohabitation question. The combined marital/cohabitation status question can create ambiguity; a follow-up question would be needed to determine precise marital status for cohabitators. (Hunter, 2005b). Confusion arises when a married person cohabits with someone other than her/his spouse (Hunter, 2005a). Further, several respondents first identified as cohabiting but later claimed to be married when receiving the combined question (O’Connell, et al., 2005). Finally, the separate item yields higher rates of cohabitation. The sequence in Box 9 satisfies these recommendations.

Cognitive interviews also tested a separate cohabitation question as part of the revised marital history series mentioned earlier. (DeMaio & Bates, 2011) Results indicated that cohabiting same-sex couples without a legal relationship status usually defined themselves as “currently living with a boyfriend/girlfriend or partner.” The study recommended asking a separate cohabitation question when possible to allow these couples to indicate a committed relationship status. The preferred ordering of the item is after the marital status question but before the new domestic partnership/civil union question. Once more, the sequence in Box 9 satisfies these recommendations.

## **E. Measuring Diverse Relationships**

Prior to the establishment of MRFHS, the Census Bureau sponsored ethnographic research on relationships and household structure, cultural conceptions of households, and who is considered a household member and/or a family member (Schwede, 2004). Research was also conducted on “complex households,” that is, households with persons other than, or in addition to, nuclear family relatives (Schwede, 2004) (Schwede, et al., 2006). Complex households increased from 18.4 percent in 1990 to 21 percent in 2000 (Schwede, 2008). Other research documented wide variation in household and family size and structure across race/ethnic groups and how this might be changing as the U.S. moves toward a majority-minority society in the 2040s, if current trends continue. (Schwede, 2007) (Schwede, 2012) Additionally, there are external academic studies on households, marriage, and family structures, many of which were highlighted during the 2011 *Counting Couples, Counting Families* conference. These stress the importance of measuring family structures that account for union instability, family ties across households, intergenerational and multigenerational households, and complex family households such as doubled-up families and subfamilies and “boomerang” households with young adults (Harris, 2011) (Brown & Manning, 2011) (Hofferth, 2011) (Elliott, et al., 2011) (Mykyta, 2012).

Many of these studies suggest that the traditional way of measuring relationships in the decennial census and ACS is inadequate for classifying a wider range of household types including subfamilies and relationships that extend beyond cohabiting household members, such as distant kin networks. Although some Federal surveys collect inter-relationships among and between all household members (like the SIPP), most do not because of the complexities and respondent burden associated with rostering and asking these questions in a self-administered mode. (One exception is the self-administered UK census form, which collects the relationship of each person to each of the household members, not just the householder.)

## **F. Conclusion**

This chapter has reviewed research to improve measurement of household relationships, particularly for same-sex couples, in Federal household surveys. Much of this research stemmed from issues identified with the measurement of same-sex couples in two of the key U.S. population studies: the decennial census and American Community Survey. Following analysis of these data using qualitative and quantitative means by Census Bureau staff and others, a set of revised relationship, marital status and cohabitation questions has been developed that offers promise in improving the measurement of diverse households, particularly for same-sex couples. Field tests currently underway or which have recently returned from the field will provide some assessment of how well the questions perform, although further testing of measurement of these less common households is still desirable.

Work has also been underway to improve measurement of relationships of children to the reference person in households, particularly for same-sex couples and other non-opposite sex, married parental combinations such as parent/grandparent or parent/unmarried partner. Field testing that has been completed shows positive results--more reporting of same-sex parent and grandparent-led households and lower item nonresponse.



## Chapter 5. Considerations for Household Surveys in a Diverse Society

### A. The Purpose of the Interagency Working Group

Changes in family law, societal norms, the economy, and demographic trends have led to greater complexity in living arrangements and relationships between and among household members. Measurement of household relationships in Federal surveys, however, has been slower to adapt to changes in family life. Current measurement practice misses some key relationships, or, put simply, does not adequately reflect reality. The Measuring Relationships in Federal Household Surveys (MRFHS) group was created to consider ways of improving measurement of household relationships in Federal data collection and reporting. Improved measurement, in turn, will enhance our understanding of family life and better inform social policy and programs.

MRFHS members were drawn from a variety of Federal agencies, both those that collect data and those that use data to manage Federal programs and policies. This paper summarizes the group's work, to date, to identify and begin to address shortcomings in the measurement of marital and household relationships. Chapter 2 identified, compared, and contrasted measures of household relationships currently used in Federal surveys. Chapter 3 provided a review of the various descriptive and programmatic uses for these items. Recent Federal research on relationship measurement was discussed in Chapter 4, including qualitative and quantitative testing of alternate relationship items. This chapter provides the groundwork for future endeavors in related areas. Although the working group recognizes the broad scope of capturing household relationships, the focus of this initial report is on improving measurement of same-sex couples and related content. The working group believes that the recommendations made here will also be useful for accurately capturing relationships other than same-sex couples.

### B. General Considerations

Although more research and discussion will be required to resolve the broad array of issues relating to the measurement of household relationships, at this time, agencies should consider the following when conducting or sponsoring household surveys:

- ***Question wording should incorporate sex-inclusive/neutral language wherever possible. This is important when measuring intimate, familial, and/or nonfamily relationships.***

Use of sex-inclusive/neutral language helps ensure that respondents find a meaningful category among an item's response options. In addition, such language can broaden measures to capture combinations other than male-female.

- ***Federal surveys should continue working to collect information on intimate relationships other than opposite-sex marriage. One aspect of this is measurement of same-sex marriages. In addition, it is important to capture nonmarital relationships including cohabiting unions, domestic partnerships, and civil unions.***

Until recently, the Defense of Marriage Act (DOMA) prohibited the recognition of same-sex married couples for Federal programs. Although the repercussions of the recent Supreme Court decision partially overturning DOMA are not yet fully understood, it may be that information on

same-sex spouses may soon be used for programmatic purposes. Regardless, this information is important for statistical purposes and the accurate portrayal of the American population. In addition, States have independent and varying legislation regarding same-sex marriage. Beyond marriage, State authorization and recognition of alternative legal union statuses, both for same- and opposite-sex couples, have been expanding. Thus, data collectors must be ready to implement alternative relationship items on relatively short notice.

## **C. Improving the Measurement of Household Relationships**

### *1. Utilize Proposed Changes to Existing Measures*

Chapter 4 identified questions measuring relationship and marital status that satisfy our recommendations for sex-inclusive language and improved measurement of diverse household relationships more broadly. The principle of sex-neutral language is applied in the measurement of relationship to child by shifting the focus from identifying a mother and father to identifying a first and (where applicable) second parent.<sup>47</sup> This principle is applied in the measurement of relationship to householder by expanding the response for “Husband or wife” to include the term “spouse.”<sup>48</sup>

The relationship to householder and marital status questions collect information on intimate relationships more broadly. Two changes to the relationship to householder question address this issue. First, although the response option for “Unmarried partner” was previously offered, here it has been moved up the list to appear just below the option for “Husband/wife/spouse.” Second, these response options were expanded to create separate choices for same- and opposite-sex couples.<sup>49</sup>

In the marital status sequence, non-marital relationships are captured using additional questions. The first question in the sequence is similar to items on marital status currently in use. By revising rather than completely overhauling this item, comparisons between new and historical data can be made. However, the second and third questions are new. The second question directly measures cohabitation and the third question captures domestic partnerships and civil unions.<sup>50</sup>

Based on existing research, the newly developed questions and answer categories proposed in this report appear to be the best candidates at this time for improvement of household relationship measurement in Federal surveys. These items not only provide for improved measurement of same-sex married and unmarried couples, but may also improve the measurement of opposite-sex couples and relationships in general. They collect detailed information regarding other legal union statuses such as domestic partnerships and civil unions, as well as the less formal but common relationship status of cohabitation. Nonetheless, further quantitative research is needed to assess the differences between these items and existing measures, and the working group recognizes such further research may yield additional improvements or different approaches. Additionally, adoption of these items may vary according to the scope, purpose, and length of a given survey. For example, a survey focused on family remittances may implement the relationship to householder and marital status sequence in full, whereas a survey on household energy consumption may wish only to modify the relationship to

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<sup>47</sup> See Appendix 4 for an example of question wording and response categories.

<sup>48</sup> See Appendix 5 for an example of question wording and response categories.

<sup>49</sup> Id.

<sup>50</sup> Id.

householder item. However, all agencies are encouraged to carefully consider the items proposed here, as family living arrangements are relevant for a broad array of social phenomena.

## *2. Identify Opportunities for Further Testing*

Given the limited amount of testing resources available, the working group recommends that more testing opportunities be identified and utilized wherever and whenever possible. The items we present as strong candidates to improve measurement of household relationships were developed using largely exploratory and qualitative techniques. Since the incidence of some household relationships is relatively low in the general population, these recommended items need to be tested with large, representative samples prior to routine use in data collection instruments. Such testing should examine issues of measurement error and mode of collection, along with potential implications on response rates. Where qualitative research did not provide a clear recommendation, split-panel testing can be used to test alternative wording of potential items.

Tests of the proposed relationship and marital status questions are complete with results pending in four surveys, including the 2012 National Household Education Survey (NHES), 2013 American Community Survey-Questionnaire Design Test (ACS-QDT), 2013 American Housing Survey (AHS), and the 2013 Survey of Income and Program Participation-Event History Calendar (SIPP-EHC). See Appendices 4-7 for the exact question wording tested in each survey. The 2012 NHES, which is representative of children living in households, was fielded in January 2012 to about 159,000 households. The ACS-QDT was fielded from June through August 2013, surveying a sample of 50,000 households, with about 10,000 households receiving the revised questions. The 2013 AHS was fielded in summer 2013, yielding a sample of approximately 160,000 households, about half of which were asked to respond to the revised questions. The SIPP-EHC is a longitudinal survey representing the civilian, non-institutionalized population. Data from its 2013 field test will allow comparison of the proposed relationship and marital status questions based on responses from 2,200 sampled households.

In addition to tests completed (and soon-to-be-completed, with results pending), two additional tests are planned. In preparation for the 2020 Census, the Census Bureau is testing the new relationship question during summer 2014. Typically, this would involve a large-scale test in multiple collection modes. A split-panel study will compare the new question featuring explicit categories for opposite-sex and same-sex spouses or partners with a control question that has only one category each for spouse or partner. See Appendix 8 for the control and experimental versions of the question. In addition, the Census Bureau aims to test both the revised relationship to householder question and marital/relationship status series in the next American Community Survey (ACS) content test, currently scheduled for March 2016. This content test would survey a national sample of 60,000-70,000 addresses.

As OMB becomes aware of other testing opportunities through its review of agency information collections under the Paperwork Reduction Act, the working group suggests it provide guidance in appropriate contextual situations. A main goal of continued testing should be ongoing evaluation of our “best” option at any given moment. In addition to quantitative testing of the question wording and response categories presented here, the following additional testing related to the relationship and marital status items would be useful:

- ***Conduct cognitive testing of translations in Spanish and other languages used in surveys.***  
*Assess translations of question wording and response categories for the proposed relationship to*

*child, relationship to householder, and marital status items.*

To date, cognitive testing of the proposed relationship to householder and marital status questions has focused primarily on the English version of the items. Although professional translators prepared a Spanish translation of an early version of the questions, cognitive testing among the target population is needed. An earlier Spanish version of the relationship to child item was cognitively tested. However, some changes made to the translation since then should also be cognitively tested.

- ***Test branching patterns for the answer categories of the relationship to householder question.*** *That is, develop and test internet instruments that present an initial, condensed set of categories that can expand to the full list.*

Social survey techniques must adapt to the changing habits of the target population. One result of this is the development of internet instruments in recent years. However, most current instruments were designed for use on a desktop or laptop with a full screen. As the use of smartphones and tablets grows, it is important to adapt survey items to fit on these smaller screens.

- ***Estimate the impact of discontinuing the practice of editing same-sex spouses to same-sex unmarried partners, as well as other data processing operations that impact these and other estimates of household relationships.*** *First, assess the impact on estimates of same-sex spouses. Then, assess the effect on other related estimates.*

At this time, we do not know the likely impact of maintaining the responses of same-sex couples who report as spouses. This could affect many other estimates in addition to same-sex spouses. For example, estimates of families living below poverty level would change. Because all married-couple households are classified as families, whereas unmarried-couple households are classified as such only if another person related to the householder is present, the universe of families living below poverty would also change.

Although additional research on editing and other processing operations is needed, there are steps that Federal agencies can take at this time. First, we suggest that agencies review and become familiar with their editing and processing procedures, including the practice of editing same-sex spouses to unmarried partners. Second, we encourage agencies to provide better documentation on editing and processing procedures, including the creation of flags on public-use data sets that enable data users to identify edited cases.

### *3. Expand the Scope of Research*

This report has focused mainly on relationship measurement of same-sex couples, and the committee did not conduct a thorough literature review of research regarding measurement of other family structures and relationships that fall outside those captured in most Federal household surveys. Given the narrow focus of this report and outstanding research questions, we recommend continued investigation of research gaps in relationship measurement. Below, we do not intend to present a specific research agenda. Rather, we suggest possible topics for further research and discussion, including:

- ***Defining and measuring family and household relationships.*** What type(s) of families and households are Federal agencies interested in measuring? How expansive should relationship categories be?

There is no one single, universal definition of “family.” Families can be *nuclear*—that is, comprised of two parents and their biological children—or *extended*—that is, containing additional relatives. Households with distant relatives may be lineally extended and contain relatives from additional generations such as grandparents or great-grandchildren, and/or laterally extended, including relatives from the same generation such as siblings-in-law or cousins. Further, families can be defined in terms of biological, legal, and/or social ties. People typically count among their family members those related to them by birth, marriage, or adoption. Some also count those with whom they lack a biological or legal tie, but who are important sources of social support including caregiving, emotional support, or financial exchange. Examples of these are “social fathers,” informally adopted children, and fictive kin.

A related issue is the level of detail needed in relationship categories. If an agency were only interested in nuclear families, categories for spouses and types of children would suffice. If interested in extended families or ties that are solely social in nature, additional categories are needed. A particular issue is whether a specific relationship type needs its own category or can be subsumed under “Other relative” or “Other nonrelative.”

- ***Determining whether to measure families, households, or both.***

A *family* is often defined as those related by birth, marriage, or adoption, whereas a *household* consists of those sharing a physical residence. Although families and households often overlap, this is not always the case. Some households, including family households, include nonrelatives such as boarders or roommates. In other cases, family ties cross households. For example, a minor child may have a nonresident parent who provides financial and/or social support. Despite the fact that this parent lives elsewhere, the child may still consider him or her to be family. Persons who live in other households but share in domestic functions and support may function as “households without walls” in some contexts, particularly among minority groups such as American Indians, African Americans, and Native Hawaiians. (Schwede, 2004) A separate issue involves households that contain more than one family.

- ***Determining residence rules.*** Who does and does not count as a household member?

Most Federal surveys create a household roster, or list of household members, early in the survey to decide about whom to gather information. Residence rules determine who should be listed on the roster. Some surveys, like the ACS, utilize a “current” residence concept, while others, like the CPS, utilize a “usual” residence concept. Although determining residence is straightforward in either case for those who have one residence where they live full-time, it is more difficult for short-term or part-time residents. For example, college-aged children living in dormitories during the school year may or may not be counted as members of their parents’ households or consumer units. Further, children in joint custody may move back and forth between the homes of parents and/or caregivers, making it difficult to determine whether they should be rostered in sample housing units. In surveys using a “current” residence concept, deployed military personnel may not be counted as members of their households in the U.S., thus underestimating military families, couples, and parents.

- ***Determining adequacy of keying household relationships to a single household member.***  
*Should additional relationships be collected?*

When creating household rosters, many Federal surveys ask about how one person is related to all others in the household. Typically, this person is the householder, also known as the reference person or “person 1.” Sometimes, the roster lists relationships to a focal child. Thus, although a survey of a 3-person household collects information on how person 1 is related to persons 2 and 3, we may not know the exact relationship between persons 2 and 3. For example, a survey may identify an unmarried partner and biological child of the householder. It may also be informative to know how the partner and child are related to another, such as whether the partner identifies as a biological parent, stepparent, or nonrelative of the child.

- ***Determining whether to measure relationship status, history, or both.***

Like many social phenomena, relationships are subject to change over time. Whereas *relationship status* captures one’s relationships at a single point in time, *relationship history* refers to consistency and change in bonds across time. Shifts, of course, can occur in romantic relationships, because of events including marriage, divorce, widowhood, and cohabitation. These same events can also alter filial relationships, as children lose or gain parental figures. Although relationship status is a useful measure, relationship histories are required when studying family instability.

- ***Understanding the data by comparing with administrative records.***

The measurement of household relationships on any Federal survey is subject to the properties of the survey design and individual reporting. Research comparing survey data with administrative records could provide a better understanding of the characteristics of both datasets. Studies could be on a small or large scale, depending on the complexity of the data and the availability of data for certain geographies. Potential administrative datasets that could provide relevant comparisons include marital status in tax data from the Internal Revenue Service (IRS), State or county marriage licenses and divorce filings, birth certificates for parentage, and perhaps death certificates to determine widowhood. Research utilizing administrative data would inform population differences in the estimates of marital status and parent-child relationships and other characteristics of the data.

These topics are offered as potential items to discuss and/or investigate, rather than as a recommended research agenda. Further discussion is needed to develop such an agenda. A good starting point may be to compare the definitions and practices raised here across Federal agencies and surveys. All future discussion and research will need to weigh programmatic and research needs against respondent burden and survey cost. Although it is important to promote research of relevant topics, agencies must, as much as possible, try to minimize the length and cost of surveys.

#### *4. Share Knowledge to Move Forward*

One of the biggest challenges to the working group has been identifying and bringing together relevant parties to this discussion. This task requires consideration of legal and programmatic data needs, as well as the research data wants of various parties. Some issues may have greater imperative than others

may, but all of the knowledge gathered by the working group should help to ensure that MRFHS members are not expending scarce resources in redundant and inefficient ways. Continued recognition and support by OMB and agencies with research support funding will ensure that the broad array of subtopics relevant to household relationships continues to receive attention.

To enable ongoing information exchange, a continuing working group on household relationship measurement should be maintained. As data and evaluation results from various tests and implementations become available, they should be circulated among group members. This group or a successor group need not be chaired by OMB, but would benefit from OMB's continued involvement given OMB's coordination role across Federal agencies. Contingent on financial support and interest, it might well be a functional activity emerging from one of the Federal funding sources relevant to the topic (e.g., HHS or NICHD), and perhaps even organizationally located at a relevant academic research center. In this way, cooperative development and information exchange could be accomplished within both the Federal sector and the academic research community.<sup>51</sup>

A large number of academic and policy research organizations, in addition to Federal agencies, have a stake in this topic. In some cases, these groups are working in conjunction with Federal agencies on implementation activities to achieve programmatic goals. In other cases, the interest may be more intellectual than applied. Thus far, MRFHS has concentrated on knowledge from and research by Federal agencies. Future efforts should consider how to incorporate academic and policy studies, especially research using Federal survey data. Awareness of the various activities and organizations working on improved relationship measurement is necessary, as it will provide additional insight and allow us to leverage current knowledge from the field.

#### **D. Conclusion**

Over the past four years, participants from 23 Federal agencies have worked together to examine issues related to measuring relationships in Federal household surveys. Specifically, we have discussed approaches to ensure that measurement keeps pace with social changes in American family life. Through our review of current measures, data uses, and research on measurement strategies, the MRFHS has arrived at two recommendations: First, question wording should incorporate sex-neutral language wherever possible. Second, Federal surveys should continue working to collect information on intimate relationships other than opposite-sex marriage.

More work remains to be done. Although we have presented examples of question wording and response categories to be used in the future, we recognize the need for additional testing of these revised relationship and marital status items.

We further recommend that a broader scope be adopted moving forward. Although measurement issues regarding same-sex couples are quite important in their own right, they represent a small part of a much larger complex of concerns relating to relationship measurement. Finally, results from tests and discussions should be widely shared, not only among Federal agencies but also with other interested parties such as academic and policy research organizations. Together, use of revised questions, continued testing, a broadened focus, and collaborative sharing will ensure that progress continues,

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<sup>51</sup> If this approach were to be adopted, we acknowledge possible implications vis-à-vis the Federal Advisory Committee Act.

rather than stagnates on this important and evolving issue.



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## APPENDIX 1. Summary of Federal Household Relationship Measures for Selected Surveys, by Agency

Department	Agency	Survey	Sex		Household Roster			Marital Status		Cohabitation	
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status		Marital History
						Child*	Adult <sup>+</sup>				
Department of Agriculture	National Agricultural Statistics Administration	ARMS: Agricultural Resource Management Survey	■						■		
Department of Agriculture	National Agricultural Statistics Administration	Census of Agriculture	■								
Department of Commerce	Census Bureau	ACS: American Community Survey	■	■	■				■	■	
Department of Commerce	Census Bureau	AHS: American Housing Survey	■	■	■				■		

\* How is <person> related to the <child>?

<sup>+</sup> How is <child> related to <person>?

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Commerce	Census Bureau	CPS: Current Population Survey	■	■	■				■		■
Department of Commerce	Census Bureau	Decennial Census: United States Census Bureau	■	■	■						
Department of Commerce	Census Bureau	FHWAR: National Survey of Fishing, Hunting, and Wildlife-Associated Recreation	■	■	■				■		
Department of Commerce	Census Bureau	SIPP: Survey of Income and Program Participation	■	■	■			■	■	■	
Department of Education	National Center for Education Statistics	AE-NHES: Adult Education-National Household Education Survey				■			■		■

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Education	National Center for Education Statistics	ASPA-NHES: After-School Programs and Activities Survey-National Household Education Survey				■			■		■
Department of Education	National Center for Education Statistics	BTLS: Beginning Teacher Longitudinal Study	■						■		
Department of Education	National Center for Education Statistics	ECLS-B: The birth cohort of the Early Childhood Longitudinal Study	■	■					■		
Department of Education	National Center for Education Statistics	ECLS-K: The Early Childhood Longitudinal Study, Kindergarten Class of 1998-99	■	■					■		

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Education	National Center for Education Statistics	ECPP-NHES: Early Childhood Program Participation-National Household Education Survey	■	■		■			■		■
Department of Education	National Center for Education Statistics	HHL-NHES: Household and Library Use-National Household Education Survey	■	■		■			■		
Department of Education	National Center for Education Statistics	HSLs (Student and Parent): High School Longitudinal Study	■		■	■			■		■
Department of Education	National Center for Education Statistics	NPSAS: National Postsecondary Student Aid Study									

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Education	National Center for Education Statistics	PFI-NHES: Parent and Family Involvement in Education-National Household Education Survey	■	■		■			■		■
Department of Education	National Center for Education Statistics	SR-NHES: School Readiness-National Household Education Survey	■	■		■			■		■
Department of Education	National Center for Education Statistics	SS&D-NHES: School Safety and Discipline-National Household Education Survey	■	■		■					
Department of Education	National Center for Education Statistics	TFS: Teacher Follow-up Survey								■	



Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult <sup>+</sup>				
Department of Education	National Center for Education Statistics	Youth-NHES: Youth-National Household Education Survey				■					
Department of Energy	U.S. Energy Information Administration	RECS: Residential Energy Consumption Survey	■								■
Department of Health and Human Services	Administration for Children and Families	FACES: The Head Start Family and Child Experiences Survey	■	■	■	■		■	■		
Department of Health and Human Services	Agency for Healthcare Research & Quality	MEPS: Medical Expenditure Panel Survey	■	■	■				■		
Department of Health and Human Services	Centers for Medicare & Medicaid Services	MCBS: Medicare Current Beneficiary Survey							■		

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Health and Human Services	National Center for Health Statistics	CWBW: Child Well-Being and Welfare Module for Texas (pilot-tested 1998-99) and an additional sample of Medicaid and Minnesota Care Participants in Minnesota.			■	■			■	■	
Department of Health and Human Services	National Center for Health Statistics	Health Module (Pilot study conducted in Iowa and Washington State)	■	■	■	■			■		
Department of Health and Human Services	National Center for Health Statistics	IVMC: Influenza Vaccination Module for Children				■			■		■

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Health and Human Services	National Center for Health Statistics	NAS: National Asthma Survey	■			■					
Department of Health and Human Services	National Center for Health Statistics	NHANES: National Health and Nutrition Examination Survey	■	■	■	■	■		■		
Department of Health and Human Services	National Center for Health Statistics	NHIS: National Health Interview Survey	■	■	■	■	■		■	■	■
Department of Health and Human Services	National Center for Health Statistics	NS-CSHCN: National Survey of Children with Special Health Care Needs	■		■	■			■		■
Department of Health and Human Services	National Center for Health Statistics	NSAP: National Survey of Adoptive Parents			■	■			■		

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult <sup>+</sup>				
Department of Health and Human Services	National Center for Health Statistics	NSAP-SN: National Survey of Adoptive Parents of Children with Special Health Care Needs			■	■			■	■	
Department of Health and Human Services	National Center for Health Statistics	NSCH: National Survey of Children’s Health		■	■	■			■		■
Department of Health and Human Services	National Center for Health Statistics	NSECH: National Survey of Early Childhood Health				■			■		
Department of Health and Human Services	National Center for Health Statistics	NSFG: National Survey of Family Growth	■ (restricted file)		■				■	■	■
Department of Health and Human Services	National Center for Health Statistics	SATH: Survey of Adult Transition and Health			■				■		

Department	Agency	Survey	Sex		Household Roster			Marital Status		Cohabitation	
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status		Marital History
						Child*	Adult <sup>+</sup>				
Department of Health and Human Services	National Center for Health Statistics	SLAITS: State and Local Area Integrated Telephone Survey									
Department of Health and Human Services	National Center for Health Statistics	SPDS: Survey of Pathways to Diagnosis and Services (2011)				■					
Department of Health and Human Services	Substance Abuse & Mental Health Services Administration	NSDUH: National Survey on Drug Use and Health	■		■				■	■	
Department of Justice	Bureau of Justice Statistics	NCVS: National Crime Victimization Survey – Main and Supplements	■	■	■				■	■ <sup>¥</sup>	

<sup>¥</sup>Marital history can be obtained indirectly using panel survey data; it is not collected directly.

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult+				
Department of Justice	Bureau of Justice Statistics	SISFCF: Survey of Inmates in State and Federal Correctional Facilities			■						
Department of Labor	Bureau of Labor Statistics	ATUS: American Time Use Survey	■	■	■†				■‡		■
Department of Labor	Bureau of Labor Statistics	CE: Consumer Expenditure Survey	■	■	■†				■		■
Department of Labor	Bureau of Labor Statistics	NCS: National Compensation Survey									
Department of Labor	Bureau of Labor Statistics	NLSY79: National Longitudinal Survey of Youth 79	■	■	■	■		■	■	■	■

<sup>†</sup> Roster is based on relationship to a reference person, not necessarily a householder.

<sup>‡</sup> Marital status only if present in the household.

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult <sup>+</sup>				
Department of Labor	Bureau of Labor Statistics	NLSY97: National Longitudinal Survey of Youth 97	■	■		■			■	■	■
Department of Labor	Bureau of Labor Statistics	TPOPS: Telephone Point of Purchase Survey	■		■				■		
Department of Labor	Wage and Hour Division	FMLA: Family Medical & Leave Act Survey	■						■		
Independent Agency	National Science Foundation	NSCG: National Survey of College Graduates	■						■		■
Independent Agency	National Science Foundation	NSRCG: National Survey of Recent College Graduates	■						■		■
Independent Agency	National Science Foundation	SDR: Survey of Doctorate Recipients	■						■		■

Department	Agency	Survey	Sex		Household Roster				Marital Status		Cohabitation
			Householder	Roster/ Partner	Relationship to Householder	Relationship to Child		Interrelationships within Households	Current Marital Status	Marital History	
						Child*	Adult <sup>+</sup>				
Independent Agency	National Science Foundation	SED: Survey of Earned Doctorates	■						■		■



## **APPENDIX 2. MRFHS Survey of Federal Agencies Using Household Relationship Statistics**

1. Does your program/agency use relationship data?
  - a. Yes [Go to 2]
  - b. No [Go to 8]
2. What relationship data do you use and how?
3. What is the source of your relationship data?  
RECORD SOURCE
  - a. [If source is non-Federal, or administrative record source of information, go to 8]
  - b. [If source is a Federal survey go to 4]
4. Are there any limitations with the relationship data that you use? Explain.
  - a. Yes [Go to 5]
  - b. No [Go to 6]
5. How do you overcome these limitations?
6. Are there specific relationship data your program could use but is not currently available?
7. Same-sex issue--
  - a. Do you need same-sex data?
  - b. Are the data you need available?
  - c. What same-sex data would you like to have available?
8. Do you know of any other agencies or individuals we should reach out to regarding the use of relationship data?

Thank you for your assistance!

### APPENDIX 3. Letter from Commerce Secretary Locke to OMB Director Orszag Requesting the Establishment of an Interagency Task Force



UNITED STATES DEPARTMENT OF COMMERCE  
The Secretary of Commerce  
Washington, D.C. 20230

August 19, 2009

The Honorable Peter Orszag  
Director  
Office of Management and Budget  
725 17th Street, NW  
Washington, DC 20503

Dear Dr. Orszag:

With the approach of the 2010 Census, there has been significant attention focused on the Census Bureau's treatment of data reflecting family relationships, particularly with respect to same-sex couples who report that they are married. The Census Bureau is currently examining its plans for editing and tabulating data from the American Community Survey and the 2010 Census to identify mechanisms that will produce data that reflect this population as accurately as possible. This is in keeping with one of the Census Bureau's core missions: to produce an accurate and thorough depiction of the demographic characteristics of our society.

While the Census Bureau's initial goal is to better understand and report the data that it currently receives, the agency will also test and analyze alternative questions in order to improve its methods for collecting these data and their quality. This examination could lead to changes in the questions on the American Community Survey as well as other Census Bureau surveys that collect data on marriage and relationships.

We understand that changes of this nature will have ramifications for the entire Federal statistical system. I am asking the Office of Management and Budget, in accordance with its responsibilities for developing and issuing standards for the collection and tabulation of Federal statistics, to establish an interagency task force to examine issues related to collecting and tabulating data on marriage and relationships. I believe the mission of this task force should be to research the complex facets of this issue, provide an understanding of its implications and effects, and prepare recommendations that will guide the Census Bureau and other Federal agencies in the development and testing of questions to more accurately capture data on marriage and relationships.

I have asked Dr. Rebecca Blank, Under Secretary of Commerce for Economic Affairs—who has extensive experience studying the well-being of families and using Federal statistics—to serve as a member of any task force or working group you see fit to establish. In addition, we offer the Census Bureau's full resources in supporting whatever process OMB sets up.

Thank you for your attention to this very important matter. If you have any questions, please contact Dr. Blank at (202) 482-3727.

Sincerely,

A handwritten signature in dark ink, appearing to read "Gary Locke".

Gary Locke

## **APPENDIX 4. English and Spanish Questions for 2012 National Household Education Survey (NHES)**

**PARENT 1 LIVING IN HOUSEHOLD** *Answer questions 93 to 109 about yourself if you are the child's parent or guardian.*

*If you are not the child's parent or guardian, answer questions 93 to 109 about one of this child's parents or guardians living in this household.*

**UNO DE LOS PADRES QUE VIVE EN EL HOGAR** *Si usted es el padre, la madre o el tutor legal de este niño(a), conteste las preguntas 93 a 109 con sus datos personales.*

*Si usted no es el padre, la madre ni el tutor legal de este niño(a), responda las preguntas 93 a 109 con los datos de uno de los padres o tutores legales de este niño(a) que viva en este hogar.*

### **93. Is this parent or guardian the child's...**

- Biological parent
- Adoptive parent
- Stepparent
- Foster parent
- Grandparent
- Other guardian

### **Es esta persona...**

- el padre (o madre) biológico
- el padre (o madre) adoptivo
- el padrastro o madrastra
- el padre (o madre) de custodia temporal (Foster)
- el abuelo o abuela
- otro tutor legal

### **94. Is this person male or female?**

- Male
- Female

### **¿Es esta persona de sexo masculino o femenino?**

- Masculino
- Femenino

PARENT 2 LIVING IN HOUSEHOLD *Answer questions 110 to 127 about a second parent or guardian living in the household.*

OTRO DE LOS PADRES QUE VIVE EN EL HOGAR *Usted ya ha respondido acerca de uno de los padres de este niño(a), sea éste su padre, madre o tutor legal. Ahora, responda por favor las preguntas 110 a 127 pensando en la segunda persona que también es padre, madre o tutor legal de este niño(a) y que vive en el hogar.*

**110. Is there a second parent or guardian living in this household?**

No → GO TO question 128

Yes

**¿Hay otro padre, madre o tutor que vive en este hogar?**

No → PASE a la pregunta 128

Sí

**111. Is this person the child's...**

Biological parent

Adoptive parent

Stepparent

Foster parent

Grandparent

Other guardian

**Esta persona es...**

el padre (o madre) biológico

el padre (o madre) adoptivo

el padrastro o madrastra

el padre (o madre) de custodia temporal (Foster)

el abuelo o abuela

otro tutor legal

**112. Is this person male or female?**

Male

Female

**¿Es esta persona de sexo masculino o femenino?**

Masculino

Femenino

## APPENDIX 5. English and Spanish Questions for 2013 American Community Survey-Questionnaire Design Test (ACS-QDT)

### 2. How is (name) related to (reference person)?

Opposite-sex husband/wife/spouse	Grandchild
Opposite-sex unmarried partner	Parent-in-law
Same-sex husband/wife/spouse	Son-in-law or daughter-in-law
Same-sex unmarried partner	Other relative
Biological son or daughter	Roomer or boarder
Adopted son or daughter	Housemate or roommate
Stepson or stepdaughter	Foster child
Brother or sister	Other nonrelative
Father or mother	

### ¿Cómo está (Name) relacionado(a) con (reference person)?

Esposa/esposo/cónyuge del sexo opuesto	Nieto(a)
Pareja no casada del sexo opuesto	Suegro(a)
Esposa/esposo/cónyuge del mismo sexo	Yerno o nuera
Pareja no casada del mismo sexo	Otro pariente
Hijo(a) biológico(a)	Inquilino(a) o pupilo(a)
Hijo(a) adoptivo(a)	Compañero(a) de casa o de cuarto
Hijastro(a)	Hijo(a) de crianza (foster)
Hermano(a)	Otro no pariente
Padre o madre	

*Note: Those who are age 15 or over receive the next question.*

### 20 a. What is (name's) current marital status?

Now married  
Widowed  
Divorced  
Separated  
Never married

### ¿Cuál es el estado civil actual de (name)?

Casado(a) actualmente  
Viudo(a)  
Divorciado(a)  
Separado(a)  
Nunca se ha casado

*Note: Those who answer 'Now married' or 'Casado(a) actualmente' are skipped to the next full question.*

**b. Is (name) currently living with a boyfriend/girlfriend or partner in this household?**

Yes

No

**¿Vive (name) actualmente con su novio/novia o pareja en este hogar?**

Sí

No

**c. Is (name) currently in a registered domestic partnership or civil union?**

Yes

No

**¿Está (name) actualmente inscrito(a) en una unión de hecho o unión civil?**

Sí

No

## APPENDIX 6. English and Spanish Questions for 2013 American Housing Survey (AHS)

### What is (your/(Name's)) relationship to (reference person)?

Opposite-sex husband/wife/spouse	Brother or sister
Opposite-sex unmarried partner	Parent-in-law
Same-sex husband/wife/spouse	Son-in-law or daughter-in-law
Same-sex unmarried partner	Other relative
Biological son or daughter	Foster child
Adopted son or daughter	Housemate/roommate
Stepson or stepdaughter	Roomer/boarder
Grandchild	Other nonrelative
Father or mother	

### ¿Cuál es la relación entre (usted/(Name)) y (reference person)?

Esposo/esposa/cónyuge del sexo opuesto	Hermano o hermana
Pareja no casada del sexo opuesto	Suegro o suegra
Esposo/esposa/cónyuge del mismo sexo	Yerno o nuera
Pareja no casada del mismo sexo	Otro pariente
Hijo o hija biológica	Hijo de crianza
Hijo o hija adoptada	Compañero(a) de casa/campanero(a) de cuarto
Hijastro o hijastra	Inquilino
Nieto o nieta	Otra persona que no es pariente
Padre o madre	

*Note: Those who are age 14 or over receive the next question.*

### (Are you/is (Name)) now married, widowed, divorced, separated or never married?

Married, SPOUSE PRESENT  
 Married, SPOUSE ABSENT  
 Widowed  
 Divorced  
 Separated  
 Never married

### ¿Está es (usted/(Name)) ahora casado/a, viudo/a, divorciado/a, separado/a o soltero/a?

Casado/a, ESPOSA/O PRESENTE  
 Casado/a, ESPOSA/O AUSENTE  
 Viudo/a  
 Divorciado/a  
 Separado/a  
 Soltero/a

*Note: Those who answer 'Married, SPOUSE PRESENT' or 'Casado/a, ESPOSA/O PRESENTE' receive the next question.*

**Who is (your/(Name's)) spouse?**

**¿Quién es el/la esposo/a de (usted/(Name))?**

*Note: Those who are unmarried and age 14 or over receive the next question.*

**Is (Name) currently living with a boyfriend, girlfriend, or partner?**

Yes

No

**¿(Name) vive actualmente con un novio, una novia o una pareja?**

Sí

No

*Note: Those who answer 'Yes' or 'Sí' receive the next two questions.*

**Who is that?**

**¿Quién es esta persona?**

**Are (Name) and (Name) currently living in a registered domestic partnership or civil union?**

Yes

No

**¿(Name) y (Name) actualmente conviven en una unión libre o de hecho (una unión legal no matrimonial)?**

Sí

No



## **APPENDIX 7. English Questions for 2013 Survey of Income and Program Participation-Event History Calendar (SIPP-EHC)**

*Note: The SIPP-EHC does not have a Spanish language instrument.*

**(Does (Name)/Do you) have a parent in the household?**

Yes

No

*Note: Those who answer 'No' are skipped to the next section.*

**Who is that?**

**(Is (Name)/Are you) (your/(Name's)) biological, step, or adopted child?**

Biological child

Stepchild

Adopted child

Foster child

**(Does (Name)/Do you) have another parent in the household?**

Yes

No

*Note: Those who answer 'No' are skipped to the next section.*

**Who is that?**

**(Is (Name)/Are you) (your/(Name's)) biological, step, or adopted child?**

Biological child

Stepchild

Adopted child

Foster child

**What is (Name's) relationship to (you/(Name))?**

(Current or former) opposite sex husband/wife/spouse	Parent/Child In-law (mother/father, son/daughter in-law)
(Current or former) opposite sex unmarried partner	Brother/Sister in-law
(Current or former) same-sex husband/wife/spouse	Aunt/Uncle, Niece/Nephew
(Current or former) same-sex unmarried partner	Other relative
Child	Foster Child
Grandchild	Housemate/Roommate
Parent	Roomer/Boarder
Sibling	Other non-relative

*Note: Those who are age 15 or over receive the next question.*

**(Is (Name)/Are you) currently married, widowed, divorced, separated or (has (he/she)/have you) never married?**

Married  
Married, spouse absent – DO NOT READ  
Widowed  
Divorced  
Separated  
Never married

*Note: Those who answer 'Married' receive the next question.*

**Who is (your/(Name's)) spouse?**

*Note: Those who report a marital status other than 'Married' receive the next question.*

**During this period, did (you/(Name)) have a boyfriend, girlfriend, or partner who lived in the household?**

Yes  
No

*Note: Those who answer 'Yes' receive the next two questions.*

**Who (is/was) (your/(Name's)) boyfriend, girlfriend or partner?**

**(Is/Was) (your/(Name's)) relationship with ((Name)/this person) a registered domestic partnership or civil union?**

Yes  
No

## APPENDIX 8. English Control and Experimental Questions for 2020 Census Testing

### *Control Question:*

**((Roster person) is/you are) (your/(reference person's)) \_\_\_\_\_.**

Husband or wife	Parent-in-law
Unmarried partner	Son-in-law or daughter-in-law
Biological son or daughter	Other relative
Adopted son or daughter	Roomer or boarder
Stepson or stepdaughter	Housemate or roommate
Brother or sister	Foster Child
Father or mother	Other nonrelative
Grandchild	

### *Experimental Question:*

**((Roster person) is/you are) (your/(reference person's)) \_\_\_\_\_.**

Opposite-sex husband/wife/spouse	Grandchild
Opposite-sex unmarried partner	Parent-in-law
Same-sex husband/wife/spouse	Son-in-law or daughter-in-law
Same-sex unmarried partner	Other relative
Biological son or daughter	Roomer or boarder
Adopted son or daughter	Housemate or roommate
Stepson or stepdaughter	Foster Child
Brother or sister	Other nonrelative
Father or mother	