

# Survey of Family, Income and Employment (SoFIE)

*An OSS Seminar presentation  
6 September 2007*

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**Statistics New Zealand**

## What we will cover

- ➔ SoFIE overview
- ➔ Survey design and structure
- ➔ Progress
- ➔ SoFIE outputs and research activities
- ➔ Challenges and opportunities

## Survey of Family, Income & Employment (SoFIE)

➔ First nationally representative longitudinal survey in New Zealand

➔ Survey objective:

*... to provide information about changes over time in the economic well-being of individuals and their families, and about factors influencing that change.*

## Specific SoFIE objectives

- ➔ Longitudinally, identify patterns of change over time:
  - income level, both individuals and their families
  - measure shifts in income level
  - labour market activity, education and training, receipt of govt income support
  - transition between spells of the above
  - saving for retirement
  - family status

## Specific SoFIE objectives (cont.)

- ➔ Cross-sectionally (lesser priority), measure and estimate distributions
  - individual, family and household income
  - family and household composition
  - labour market activity
  - assets and liabilities

## Survey design and structure

- ➔ Eight waves of an annual cycle (1 Oct 2002 to 30 Sep 2010)
- ➔ Wave 1 ~ 22,000 individuals aged 15+ (OSMs), represents 2.9 million pop in private dwellings
  - waves 2–8, followed OSMs over time
  - interview all adults in the OSM households
- ➔ Core module + assets & liabilities or health modules in alternating waves 2-8

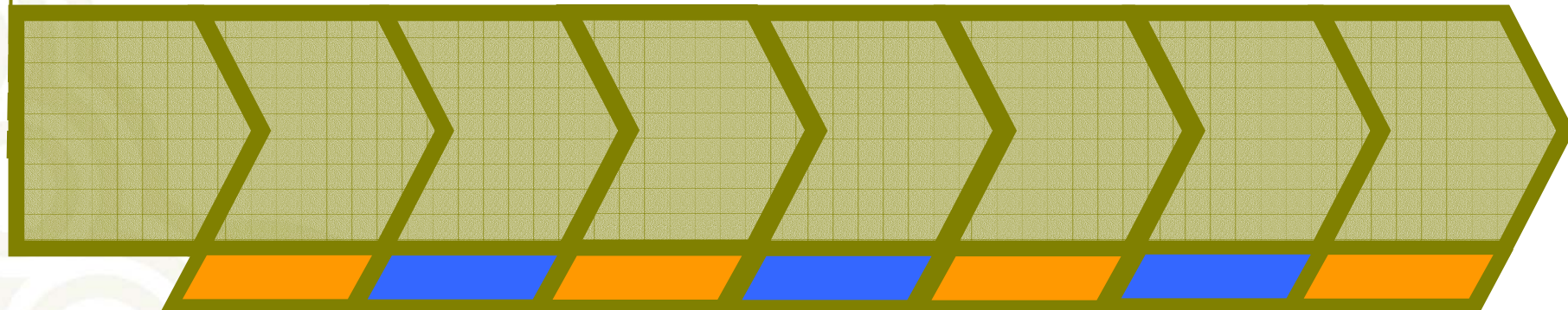
# Survey design and structure – overview

1 Oct 2002

30 Sep 2010

*wave*

1 2 3 4 5 6 7 8



Core (household, demographics, family, income, labour market, education)

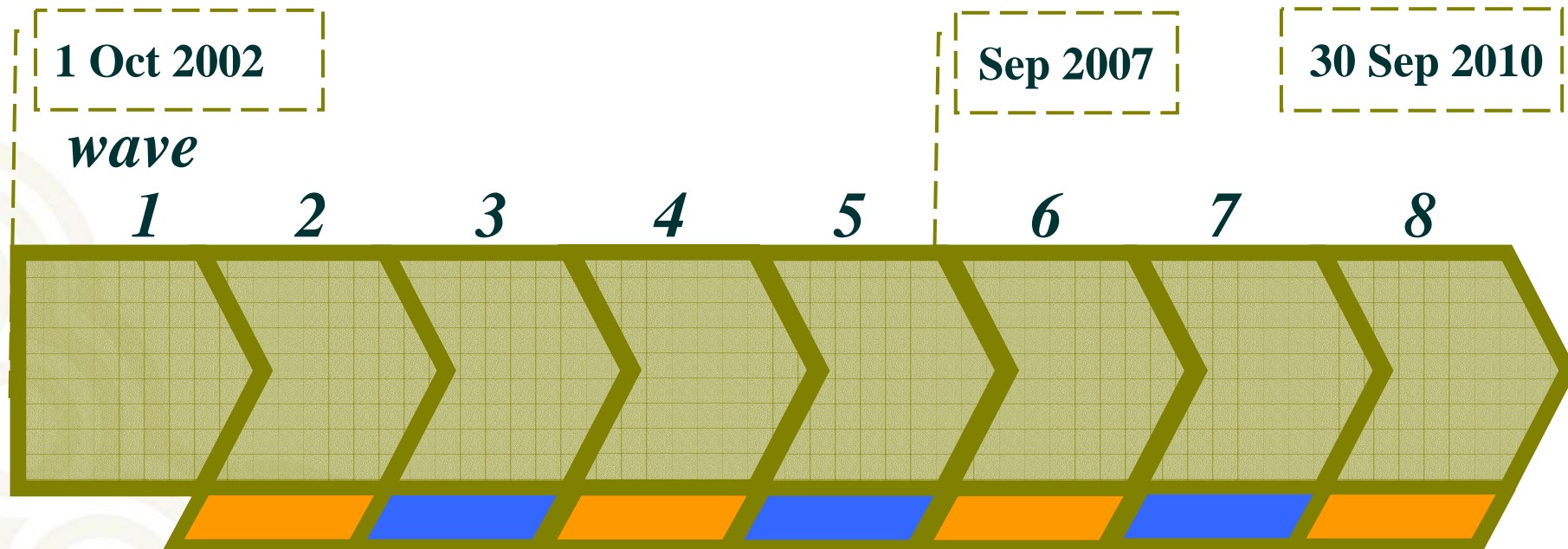


Assets & liabilities module



Health module

# Progress as at September 2007



Core (household, demographics, family, income, labour market, education)



Assets & liabilities module



Health module

## Available information

- ➔ 'Hot off the Press' first releases, waves 1 – 3
  - <http://www.stats.govt.nz>
- ➔ Customised (cross-tabulated) data requests
  - other NZ Government departments
  - academia
  - private / research companies
  - media
- ➔ Datalab (authorised on-site access to confidentialised unit record data)
  - The Treasury and Reserve Bank
  - The Ministry of Social Development
  - The Department of Labour
  - Wellington School of Medicine and Health Sciences

# Selected analytical / research outputs

## Statistics New Zealand

- Wealth disparities in New Zealand
- Selected issues in the measurement of New Zealand's saving

## The Treasury

- Housing in the household portfolio and implications for retirement saving: Some initial findings from SoFIE
- Are Kiwis saving enough for retirement? Preliminary evidence from SOFIE

## Families Commission

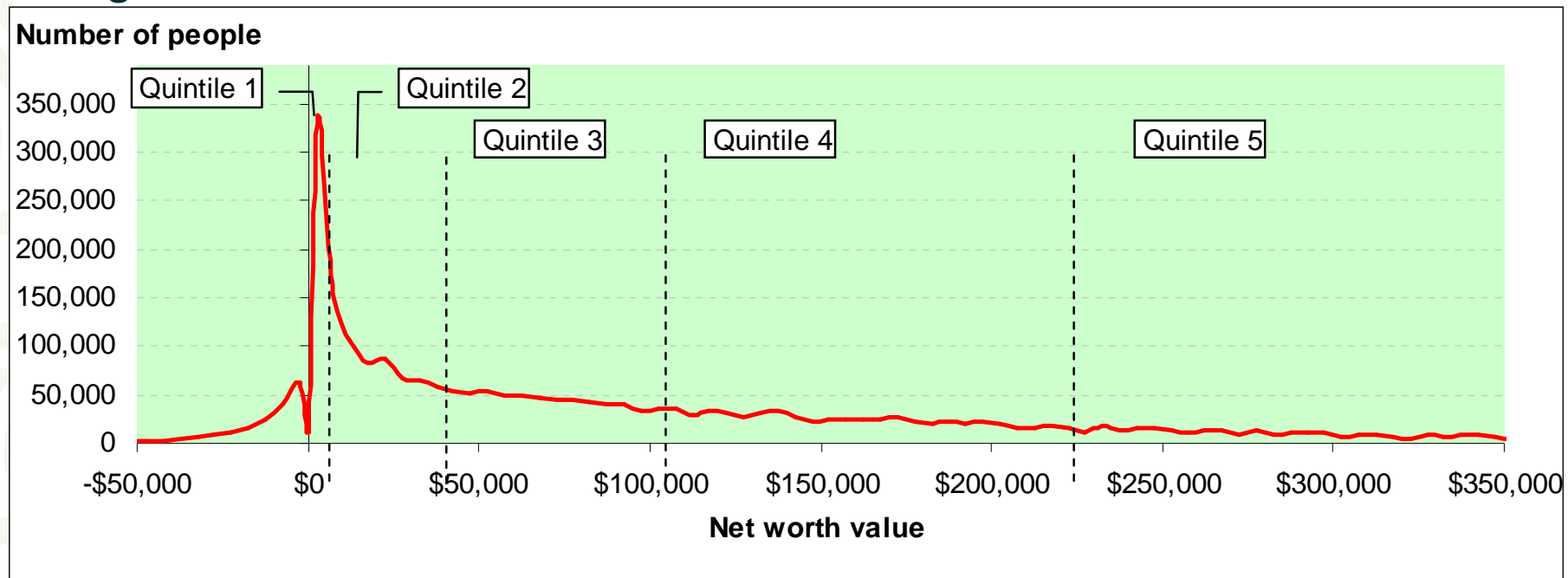
- Moving on: Changes in a year in family living arrangements

## Centre for Housing Research

- Intergenerational and interfamilial transfers of wealth & housing

# Wealth disparities in New Zealand – Statistics New Zealand

**Figure 1 Distribution of net worth value**

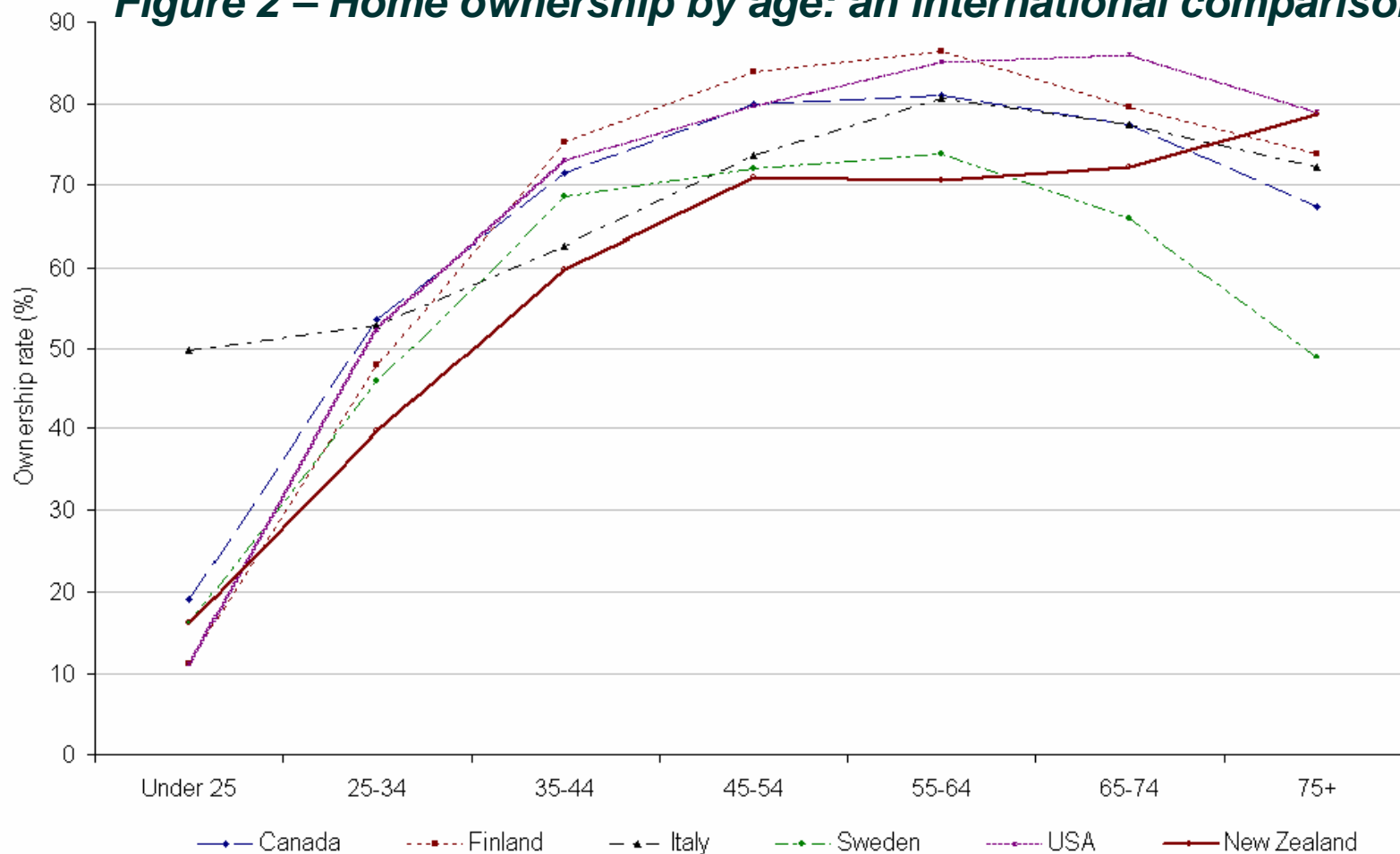


Note: excludes 14,900 (0.5 percent) individuals whose net worth is less than -\$50,000 and 316,500 (10.8 percent) individuals whose net worth is more than \$350,000

# Housing in the household portfolio

## New Zealand Treasury

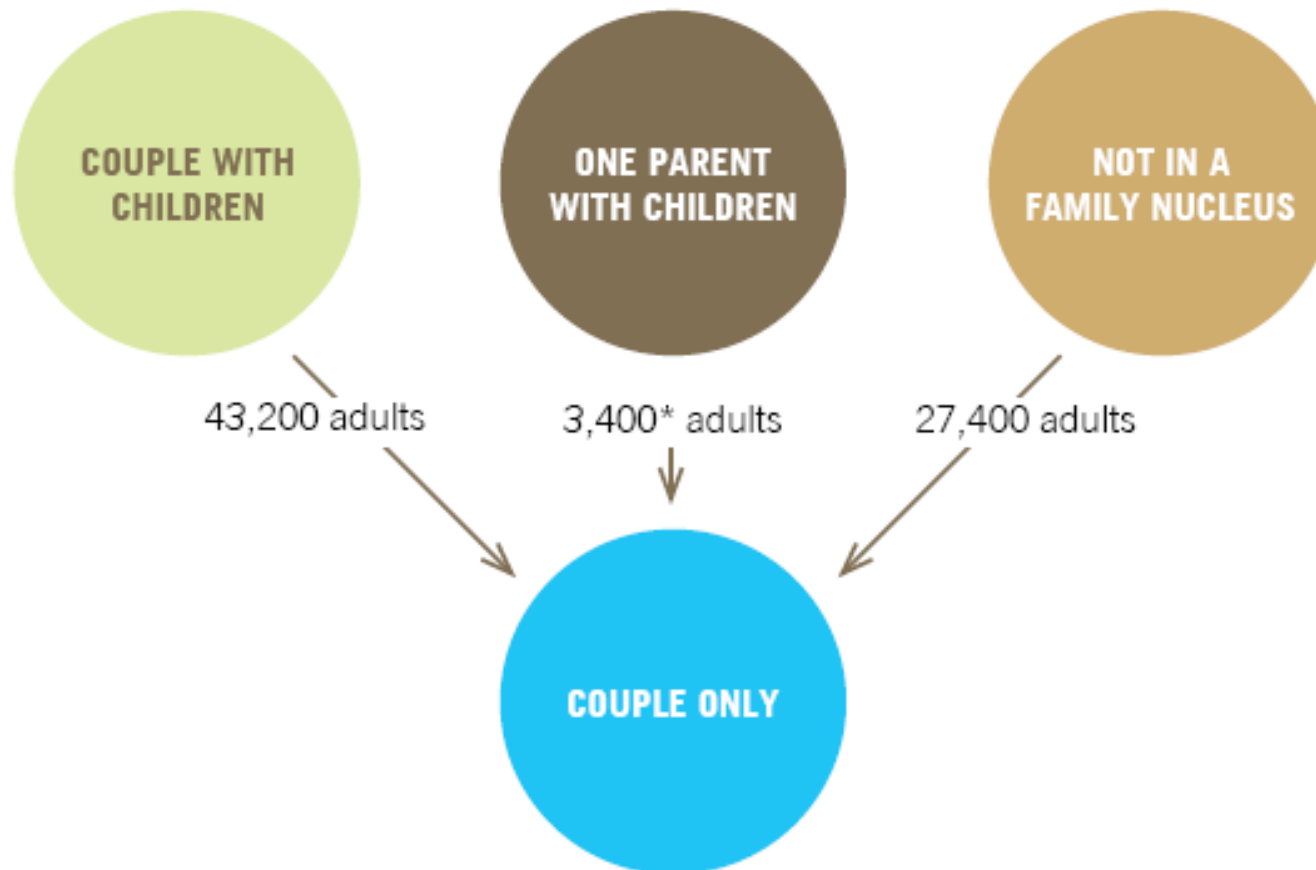
**Figure 2 – Home ownership by age: an international comparison**



Sources: New Zealand data are from SOFIE, while data for the other countries come from the Luxembourg Wealth Study (2001).

# Moving on – Families Commission

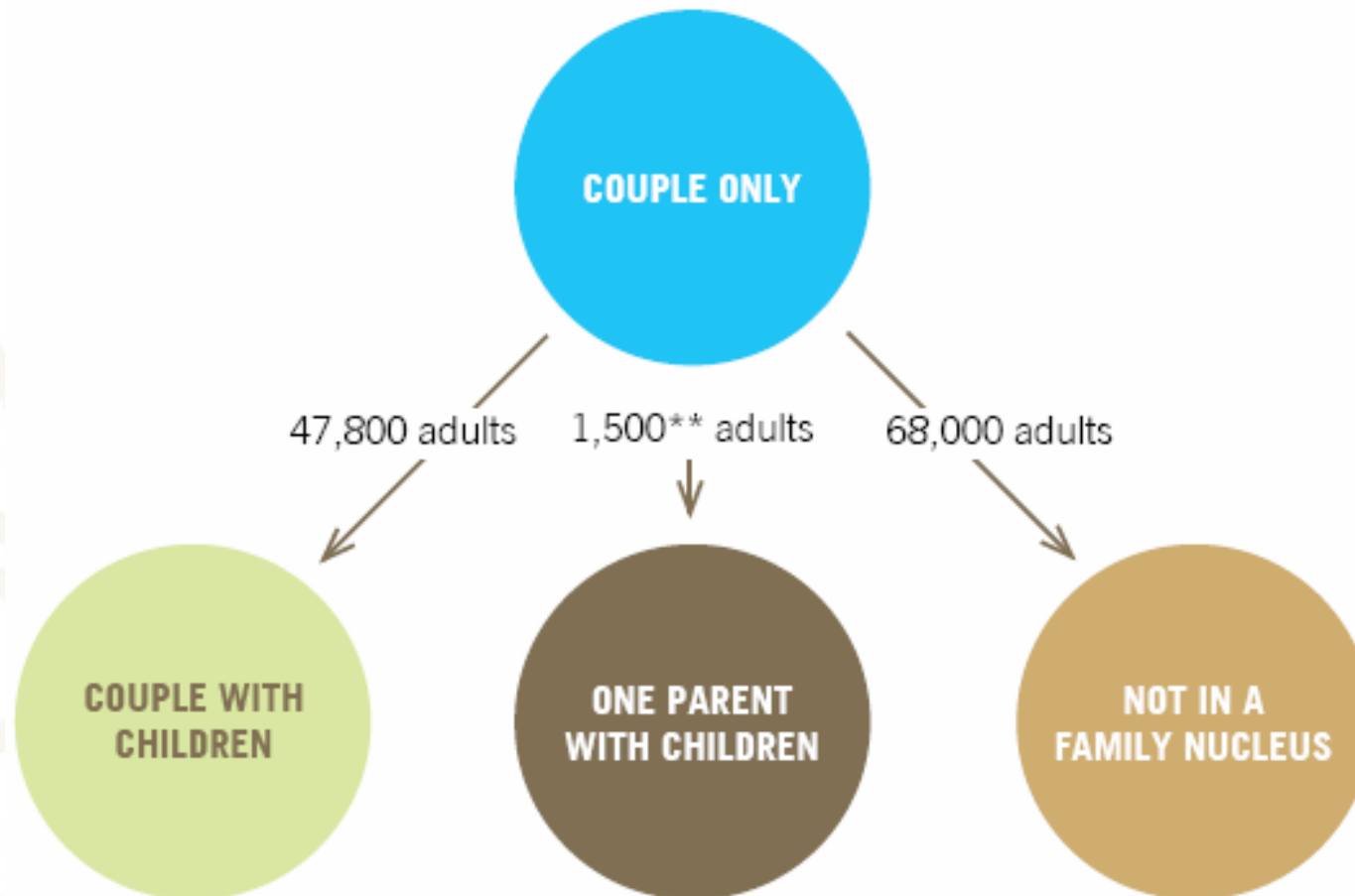
FIGURE 3: ADULTS ENTERING THE 'COUPLE ONLY' FAMILY TYPE BETWEEN 2003 AND 2004



\* A relative sampling error of greater than 30 percent and less than or equal to 50 percent; use data with caution (see Appendix One for a more in-depth explanation).

# Moving on – Families Commission (cont.)

FIGURE 5: ADULTS LEAVING THE 'COUPLE ONLY' FAMILY TYPE BETWEEN 2003 AND 2004



\*\* A relative sampling error of greater than 50 percent; data are too unreliable for most practical purposes.

## Current research activities

- ➔ Statistics New Zealand
- ➔ University of Otago, Wellington School of Medicine and Health Science
- ➔ The Department of Labour
- ➔ The Ministry of Social Development
- ➔ The Treasury, Reserve Bank of New Zealand, Office of the Retirement Commissioner

# Challenges and opportunities

- ➔ Challenges in conducting longitudinal survey
  - demand on resources and adequate planning
  - adhere to survey objectives
  - balance survey objectives with user expectations
- ➔ Information and research values
  - audience model
  - strengths of longitudinal survey, theory v. practice
- ➔ Connectivity with other surveys
  - learning from other similar surveys, eg. HILDA
  - cross-survey analysis

More information...

<http://www.stats.govt.nz/SOFIE>

**Thank you!**

A decorative graphic in the bottom-left corner consisting of several overlapping, light-colored circles of varying sizes, creating a pattern that resembles a stylized flower or a cluster of data points.