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HOUSEHOLD ECONOMIC SURVEYS IN AFRICA

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# Household Economic Surveys in Africa

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## HOUSEHOLD ECONOMIC SURVEYS IN AFRICA

INTRODUCTION:

1. By household economic surveys is meant to encompass all household surveys covering family budgets, household consumption and expenditure, food consumption and nutrition. As already mentioned elsewhere <sup>1/</sup>, these surveys constitute the main source of statistics on the distribution of income, consumption expenditure and wealth in Africa. The purpose of this paper is therefore to examine this source of data in considerable detail, covering both the methodological and the operational aspects of the problem. The progress achieved will be briefly reviewed and the prospects of future developments in this field of statistics explored.
2. The paper starts with a brief historical review of household consumption and expenditure surveys conducted so far in Africa since the early fifties. Progress achieved during the 60's, compared with the work done in the 50's, will be depicted. This will involve taking stock of the surveys conducted so far in the African region, in respect of such characteristics as type of survey (e.g., urban, rural or both); sample design, sample size, recording arrangements and frequency of visits, etc. This section of the paper ends with a summary of the present situation with respect to these characteristics in current African household economic surveys.
3. The following section of the paper consists of essentially country case studies, based on the more recent surveys conducted in eighteen countries of the region. The selection of the countries is largely based on geographical distribution, languages used (English or French), and whether the surveys in question are of national scope or of special interest. The case studies will cover such topics as content of questionnaires used, field arrangements, as well as a brief mention of sample design where this is deemed of importance. In these studies, however, the main attention will be directed to the content of questionnaires and to an evaluation of the extent to which the existing questionnaires met the requirements of data needed for the compilation of a system of statistics of the distribution of income, consumption and wealth<sup>2/</sup>.
4. The final section of the paper deals with future developments of households budget surveys in African countries. In it, a number of aspects of the problem are briefly dealt with. These include the preparation of sample frames, preliminary enumeration of households, the recording of household transactions, field organisation, frequency of visits, processing

- 1/ Availability of household sector statistics in Africa (E/CN.14/NAO/54)
- 2/ A Draft System of Statistics of the Distribution of Income, Consumption and Accumulation (E/CN.3/425), February 1972, Annex I, Major Classifications of the statistics of the System.

and analysis, amongst others. The question of whether cheaper ways of conducting household budget surveys can be found in current African conditions was raised and briefly examined in the paper. The conclusion appears to be a sad one, that is, that there appear to be no short cuts which would significantly reduce the cost of the survey without at the same time reducing the degree of accuracy of the data obtained.

### CHARACTERISTICS OF PREVIOUS SURVEYS

#### Extent of survey activity

5. The following notes present a brief examination of the arrangements used in African household economic surveys. The material is derived from records of 171 surveys or groups of surveys conducted mainly in the 1950s and 1960s. These records are believed to cover virtually all African surveys of the household budget type, at least through 1970. They do not of course include inquiries dealing with agriculture, population and other subjects. The examination has in some respects been limited by inadequate descriptions of methodology given in some survey reports.
6. However, the records are probably sufficient to provide a general indication of the extent to which African countries have used household surveys to investigate private sector transactions and characteristics and the arrangements normally adopted for this purpose.
7. It should be emphasised here that for purposes of analysis, it would be better to use the total number of interview-days than the number of surveys, as the definition of a "survey" can vary from country to country and the geographical coverage and time duration of surveys can also vary greatly one from another. However, the total number of interview-days for the surveys has not been worked out, and the reader is cautioned to bear in mind the differences in size, coverage and duration of the surveys when the frequency distribution of surveys comes under discussion.
8. It is convenient to consider the surveys in three groups: rural surveys, urban surveys, and surveys which cover both rural and urban areas. In Table 1 the 171 surveys are classified in this way and also according to sub-region. It should be noted that the East African sub-region includes Southern African countries (but not South Africa) and also the island states in the Indian Ocean. The table shows both the number of surveys and the corresponding numbers of countries in which they have been conducted.

9. The surveys which cover both urban and rural areas include some of national coverage and most of the remainder in this group obtained data for significant parts of countries. About half of the African countries have attempted these more extensive inquiries, but they have not normally been organised in the form of continuing survey programmes. Half of the countries in the region have also carried out rural economic surveys and some of these have been on a fairly large scale.

Table 1. Number of surveys and countries

	North		West		Sub-region Central		East		Total	
	S	C	S	C	S	C	S	C	S	C
Urban and rural	12	5	12	8	2	2	6	6	32	21
Rural	3	2	22	9	6	4	8	6	39	21
Urban	7	5	30	8	10	5	53	11	100	29
All types	22	6	64	13	18	6	67	16	171	41

S: number of surveys. C: number of countries.

10. However, the greater part of survey activity has been confined to the urban areas, usually for the establishment of retail price indexes. Nearly three quarters of all African countries have carried out work of this type.

11. In general, it appears that most African countries have conducted some kind of household economic survey, but it must be noted that the distribution of activity has been very uneven. Six countries alone account for almost one half of the surveys shown in the table (Ethiopia 5, Ghana 9, Ivory Coast 12, Nigeria 28, Tanzania 11 and Uganda 16). In addition it is clear that the amount of budget survey work undertaken has not been sufficient to provide adequate and continuing information on the household sector, except perhaps for urban areas in the few countries.

12. This situation is further illustrated by Table 2 which shows when the surveys under consideration were conducted. In the case of surveys covering more than one calendar year the classification related to the years in which the inquiries began.

Table 2. Dates of surveys

	<u>1950-54</u>	<u>1955-59</u>	<u>1960-64</u>	<u>1965-69</u>	<u>1970</u>	<u>Total</u>
Urban and rural	1	5	13	13	1	32
Rural	2	13	18	5	1	39
Urban	18	22	34	26	-	100
All types	20	40	65	44	2	171

13. Urban area surveys were already being used in the earlier years of the 1950s and rural and more extensive inquiries began during the latter part of the decade. There was a significant increase in survey activity of all kinds during the period immediately after independence and the work appears to have been maintained throughout the 1960s.

14. However, there have been very few household economic surveys in the present decade. It is of course possible that there are inquiries which have not yet come to the notice of the secretariat and it is known that some countries are planning surveys, but most current information supports the conclusion that there has been a marked decline in surveys of the household budget type during the last few years.

15. When the matter was discussed by the seventh session of the Conference of African Statisticians in October 1971, it was pointed out that lack of budgetary and staff resources were among the principal constraints. It also has to be borne in mind that the 1970 rounds of population and agricultural censuses and a possible increase in work on industrial surveys have necessarily limited the attention given to other kinds of inquiry.

16. There is the further point that many of the household inquiries conducted during the 1950s and 1960s were supported by bilateral and international assistance which has now been very much reduced. It would be useful to know why many African governments have apparently not considered it necessary to develop their own resources for maintaining these surveys.

#### Sample design and size

17. Every sample survey has to be designed in the light of local conditions and data requirements, so it is not possible to make a very detailed examination of all the arrangements which have been used in African household economic surveys. Also, as already noted, many of the survey reports

do not provide sufficient information for this purpose. The following remarks are therefore limited to some of the principal characteristics of survey designative procedures. Table 3 shows the frames used in obtaining the first stages of sample and in selecting households for investigation.

**Table 3. Sampling frames**  
**Urban and rural**

	Similar arrangements for whole survey	Urban components	Rural components	Rural: 10 Urban: 1	Rural: 10 Urban: 1
<b>First stage</b>					
Administrative divisions	1	2	2	2	2
Villages or geographical sections of towns	5	4	8	28	28
Enumeration areas	8	8	8	3	4
Blocks from census or other records	7	7	7	2	2
Houses	-	-	-	-	21
Establishments	-	-	-	-	27
None	4	6	1	1	36
<b>Last stage</b>					
Enumeration	17	6	9	31	32
Existing lists	5	4	1	8	68
<b>Total</b>	22	10 <sup>2/</sup>	10 <sup>2/</sup>	39 <sup>3/</sup>	100

- 1/ For each survey there is an entry in the table for both the first and last stage.
- 2/ There is a total of 10 surveys in which different arrangements were made for the urban and rural components.
- 3/ Excludes one experimental survey of nomads.
- 4/ "None" here indicates a one-stage sample, consisting of households.



19. For the more extensive surveys and those covering rural areas, administrative divisions, lists of villages, etc. have normally served as a basis for the first stage of sampling. There has been remarkably little use of census enumeration areas or of other units constructed from census records; this is because most countries in Africa do not have identifiable census EAs. This is especially the case in countries where a nationwide population census has not yet been conducted. Selection of households for most surveys in these groups involved enumeration of those in selected geographical units, sometimes with dwellings as an intermediate stage. However, nearly one half of all the surveys relied on tax and other existing lists as a means of avoiding the enumeration. The situation, as expected, differs in respect of urban and rural surveys. In the urban surveys two-thirds of the surveys used existing lists, while in the case of rural surveys, only one-quarter of them used existing lists and remaining three-quarters had to resort to enumeration.

20. In urban area surveys a first-stage sample based on geographical units was used in relatively few cases, and houses and establishments were the more popular frames. More than one third of the urban surveys used no first stage frame at all and, in most of these, households were drawn from available lists.

21. Some other sample characteristics are given in Table 4. In the surveys covering both urban and rural areas or rural areas only, a two stage sample was used in most cases. In about half of the surveys, first or second stage units were selected with probabilities proportional to their estimated sizes; in some others an effort was made to achieve units of roughly constant size. It is surprising that less than one third of these surveys apparently had any form of stratification, but it is possible that details were omitted from some of the survey reports, and as pointed out in paragraph 22, this is partly due to the fact that many of the surveys were limited to fairly narrowly defined populations and therefore in a sense, already "pre-stratified".

Table 4. Other aspects of sample design

	<u>Number of stages</u>			<u>Proportionate probability sample</u>	<u>Stratified</u>	<u>Number of Surveys</u>
	<u>1</u>	<u>2</u>	<u>3 or more</u>			
<u>Urban &amp; Rural</u>						
Similar arrangements for whole survey	1	18	3	9	6	22
Urban components	5	5	-	3	2	10
Rural components	-	9	1	6	2	10
<u>Rural surveys</u>	1	35	4	16	15	40
<u>Urban surveys</u>	37	61	2	9	26	100

22. Rather less than half of the urban group of surveys used a single stage sample. The remainder nearly all had two stages and, as indicated above, these were usually houses or establishments rather than area units. Sampling with probability proportional to size was used only in a few of the surveys based on establishments. Although the table shows only one quarter of the urban surveys as having stratified samples, it must be remembered that many were limited to specified income ranges.

23. An attempt has been made in Table 5 to classify surveys according to the numbers of households included in the final stage of samples. The result may not be very accurate because it is sometimes difficult to relate sample sizes to the time sampling arrangements. Nevertheless the figures probably give a reasonable indication of the magnitude of the inquiries undertaken.

Table 5. Number of households investigated

Number of households	Type of survey			
	Urban and rural	Rural	Urban	All surveys
Not stated	3	3	4	10
Under 500	3	27	63	93
500-999	2	4	24	30
1000-1499	3	3	5	11
1500-1999	3	1	3	7
2000-2499	6	-	-	6
2500-2999	4	-	1	5
3000-& over	8	1	-	9
Total	32	39	100	171

24. It is notable that only a little more than one third of all surveys involved more than 1,000 households. In cases where urban area surveys did so, they were normally projects involving a number of towns. The general conclusion arising from this table is that the majority of African surveys conducted in the past two decades have been too small to yield a significant amount of economic information concerning households for the continent as a whole.

# Recording arrangements

25. Some data on recording arrangements, which also cover the question of time sampling, are summarized in Table 6. Again it should be noted that there are many possible variations of the basic procedures and no attempt has been made to show these in detail. The information is somewhat less satisfactory than on other aspects of surveys and precise information on this score is not available for 24 of the 171 inquiries.

Table 6. Survey recording arrangements\*

Type of survey and recording period	Frequency of visits				No. of recording periods			Number of surveys	Sub-sample for food consn.
	Daily	2-3 times a week	weekly	longer	1	2	4+		
<u>Urban and rural</u>									
One week	11	1	2	-	7	1	6	14	4
One month	8	1	1	1	9	-	2	11	4
Longer	-	-	2	1	3	-	-	3	-
<u>Rural</u>									
One week	7	-	-	-	2	1	4	7	-
Two weeks	2	1	-	-	2	1	-	3	-
One month	12	1	-	-	10	3	-	13	9
Longer	2	1	4	2	9	-	-	9	3
<u>Urban</u>									
One week	3	2	1	-	5	-	1	6	-
One month	70	9	1	1	81	-	-	81	-
Total	129	16	13	5	144	6	13	147	20

\* Number of surveys for which precise information is not available: urban and rural 4, rural 7, urban 13.

26. In the table, the recording period is the time during which continuous records were maintained for any given household. The frequency of visits shows how often households were visited during the recording period. The number of recording periods is the number of times the basic recording period was used during the course of a survey with the same sample. No information has been included on retrospective records covering periods outside the recording periods for items such as clothing and durable consumer goods.

27. In surveys of urban and rural areas or rural areas only, three quarters of all inquiries used recording periods of one week or one month, with the shorter period being slightly the more popular of the two. In the majority of surveys records were compiled daily by enumerators. The recording period was repeated in less than one third of the inquiries, which suggests only limited coverage in time. However, in some cases recording periods may have been spread over several months; the position is not entirely clear from the information available. In a few surveys, a sub-sample was used for the more detailed recording of food consumption.

28. Urban surveys nearly all used recording periods of one month without repetition, but again investigations may sometimes have been staggered over longer periods. Daily visits were the general rule and only in a few cases was the frequency reduced to 2 - 3 times a week.

29. Two main considerations emerge from the above remarks on recording arrangements. Firstly, the time coverage of surveys in rural areas appears to have been rather limited and it is also surprising that recording periods of one week should have been used, particularly when this arrangement was seldom adopted in urban inquiries. Secondly, the preference for daily enumerator visits is notable; less frequent visits were often associated with the use of notebooks by households as an aid to memory.

#### Summary of present situation

30. The situation described in the foregoing paragraphs with regard to African household economic surveys can be summarised as follows:

- (1) The majority of African surveys have been concerned with urban areas; but inquiries have also been conducted in rural areas and in some countries national coverage has been achieved.
- (2) Although most countries in the region have carried out some survey work, the distribution of activity has been very uneven and few countries have achieved anything approaching systematic programmes of surveys.
- (3) Development of urban area surveys began in the early 1950s and was extended to rural areas during the latter half of the decade. There was a significant increase in survey activity of all kinds in the 1960s following independence, but there has been marked

decline in the 1970s. Reasons include shortages of funds and personnel and pre-occupation with inquiries in other fields such as population, agriculture and industry.

(4) In more extensive surveys, administrative divisions and village lists have normally been used as sampling frames and there has been remarkably little use of enumeration areas or other units constructed from census records. Urban surveys seldom utilised area units, but houses or establishments were frequently employed as a first stage in sampling.

(5) There is evidence that a preliminary enumeration of households was avoided whenever lists of households, taxpayers, employees, etc could be used in selecting the final stages of samples.

(6) In about half of the surveys using area units, these units were selected with probabilities proportional to their estimated sizes.

(7) There was surprisingly little use of stratified samples, but information on this point may be deficient.

(8) Only about one third of all surveys involved investigation of more than 1,000 households.

(9) In surveys of rural areas, recording periods were usually one week or one month and were repeated in only about a third of all inquiries. There is not sufficient information to show the extent to which single recording periods were staggered to take account of seasonal changes. Urban surveys nearly all used recording periods of one month, but again these may have been spread over several months.

(10) There was a marked preference for daily enumerator visits in compiling records.

31. In general, the number and size of household economic surveys carried out in African countries appear to have been too small to serve as a really significant source of information. In only a few countries have they been organised on a systematic and continuing basis. Nevertheless, data have sometimes been available from other sources such as agricultural and farm management surveys, records of co-operative societies, etc.

32. As there now appear to be very few household budget or consumption surveys in progress, this is probably a good time to examine the prospects for re-establishing the work on a viable basis.

COMPARISON OF SURVEYS CONDUCTED IN THE 50's AND THE 60's:

33. The following comparison between household budget surveys conducted in the 50's with those in the 60's is based on the 171 surveys held in 41 African countries<sup>1/</sup> already referred to in Paragraph 5. A detailed country-by-country comparison, indicating the number of surveys, type of survey (rural or urban or both rural and urban), geographical coverage (national or partial), number of households included in sample, and the publication of results, is given in Annex I to this paper.

34. It is not difficult to observe in Table 7 the upsurge of survey activities in countries of the region during the 60's as compared with the 50's. The table indicates that out of the 41 countries covered, 14 did not take any household budget surveys during the 50's, as against the figure of 5 for the 60's. More countries got interested in taking both urban and rural surveys in the 60's than in the 50's (i.e., 24 countries for the 60's as against the figure of 9 for the 50's).

Table 7. Distribution of African countries by type of surveys conducted

Sub-region

The 1950's

The 1960's

	U <sup>3/</sup>	R <sup>3/</sup>	Urban	Rural	Nil	Total	U <sup>3/</sup>	R <sup>3/</sup>	Urban	Rural	Nil	Total
North Africa	4	-	-	1	1	6	5	-	-	-	-	5
West Africa	4	-	-	2	8	14	8	3	-	-	3	14
Central Africa	-	2	2	2	2	6	4	1	1	-	-	6
East Africa <sup>2/</sup>	1	6	2	2	3	12	7	5	1	2	2	15
Totals:	9	8	9	14	38	38	24	10	2	5	41	41

1/ Excluding information for South Africa, South West Africa, Angola and Mozambique, for which information on these surveys conducted is not available.

2/ Included in East Africa here are three countries located in Southern Africa, namely, Botswana, Lesotho and Swaziland.

3/ Stands for both urban and rural.

35. Apart from the greater attention paid to rural surveys by countries of the region in the 60's, compared with the 50's, a greater number of countries have attempted surveys of national coverage. These included the surveys of Algeria (1967-68), Egypt (1965-66), Morocco (1959-63 & 1970-71), and Tunisia (1965-68) in North Africa, those of Dahomey (1965-66), Ghana (1961-62), Niger (1962-63) and Togo (1964-65) in West Africa and the surveys of Mauritius (1961-62) and Tanzania (1968-69) in East Africa. In addition, a number of countries conducted rural surveys of national or approximately national scope. These included Ethiopia (1967-68), Lesotho (1967-69), Madagascar (1961-62) and Nigeria (annual since 1962/63). Worth mentioning also are the surveys conducted by Sierra Leone in 1967-69 in 4 of its provinces and those of Sudan, which covered the latter's 6 northern provinces.

36. If one takes the number of surveys conducted as any guide, it can be seen from Table 8 that the number of surveys carried out in the 60's almost doubled that for the 50's. In the 50's, a total of 60 surveys were conducted, which included in the sample a total of some 31,000 households, of which 56% were urban and 44% rural. During the 60's, a total of 111 such surveys were carried out, which included in the sample a total of about 130,000 households, of which approximately 49% urban and 51% rural. In terms of sample size, it can be seen from Table 9 that the average sample size for the 60's doubles that for the 50's. The relatively large sample size for the countries in North Africa, was due to the fact that the surveys were mostly of national coverage and consequently were larger in size per survey. In making comparisons about the average size per survey, inter-temporal or inter-spacial, caution ought to be exercised due to the fact that large variations existed from survey to survey, in the lengths of periods of observation (one month, one week, one day, etc.) and in the frequency of household visits (e.g., daily, weekly, fortnightly, monthly, etc.).

Table 8. Number of household budget surveys and sample size by sub-region.

Sub-region	The 1950's				The 1960's			
	No. of surveys	Number of households			No. of surveys	Number of households <sup>*</sup>		
		Urban	Rural	Total		Urban	Rural	Total
North Africa	7	7,250	7,501	14,751	15	19,984	20,361	40,345
West Africa	24	4,964	4,893	9,857	40	16,858	28,231	45,089
Central Africa	4	639	33	672	14	4,653	2,397	7,050
East Africa	25	4,347	1,240	5,587	42	22,391	15,284	37,675
Totals	60	17,200	13,667	30,867	111	63,886	66,273	130,159 <sup>†</sup>

The 1960's figures include a total of 27,520 households, for which no breakdown into urban and rural is at present available. It has been assumed, for the sake of arriving at global totals, that they were evenly divided into urban and rural households in these cases. They relate to the following countries' surveys:

Algeria (1967-68)	.....	10,750 households
Morocco (1970-71)	.....	8,000 "
Dahomey (1965-66)	.....	3,000 "
Ghana (1961-62)	.....	2,970 "
Tanzania (1968-69)	....	2,800 "

Total: 27,520

For convenience sake, the national household consumption survey of Morocco (Sep. 59-Jan. 60) has been included with the surveys for the 1950's while the survey for 1970/71 (April-March) included with those for the 1960's, for the purpose of the present exercise.

Table 9. Average size of surveys conducted.

(Number of households included in sample per survey)

Sub-region	The 1950's	The 1960's
North Africa	2,107	2,690
West Africa	411	1,127
Central Africa	168	504
East Africa	223	897
Total, Developing Africa:	514	1,173



37. There appears to have been considerable timelag in releasing the survey results in the case of many countries of the region. This appears especially so for surveys of national scope. It is known that some surveys of importance that were conducted almost a decade ago, have not been adequately analysed; in a few cases, such efforts at analysis and publication are known to have been abandoned. Nonetheless, it can be said that the overall picture regarding the releasing of results and publication appears to be rosier than one might expect, and the figures in the following table would suggest that only about one-fifth of the surveys carried out in the 60's have not been published at all, in one useful form or another.

Table 10. Distribution of surveys according to state of publication.

Sub-region	The 1950's			The 1960's		
	Published	Not published	Total	Published	Not published	Total
North Africa	6	1	7	14 <sup>1/</sup>	1	15
West Africa	16	8	24	31 <sup>1/</sup>	9	40
Central Africa	4	-	4	9	5	14
East Africa	24	1	25	35	7	42
Totals:	50	10	60	89	22	111

1/ Includes surveys for which only publications of incomplete coverage have been released (North Africa: 2; West Africa: 2).

38. As mentioned in paragraph 14, a decline in survey activity in the field of household budgets and expenditure in countries of the region, appears to have set in after 1965. The declining trend continuous into the early 70's. In fact, apart from a few known cases, there appears to be very few household budget surveys being conducted at the present time in African countries.

Table 11. Household surveys conducted in developing countries, by year

	North Africa	West Africa	Central Africa	East Africa	Total
1950-54	2	7	-	12	21
1955-59	4	19	3	12	38
1960	1	4	1	4	10
1961	-	8	1	6	15
1962	1	8	3	2	14
1963	-	11	1	10	22
1964	1	7	-	2	10
1965	-	4	2	5	11
1966	2	1	-	4	7
1967	1	2	1	3	7
1968	-	1	1	7	9
1969	2	-	1	5	8
1970	1	1	-	-	2
1971	-	-	-	-	-
1972	...	...	...	1	1(?)

\* Refers to the year in which the field work of the surveys was started.

CASE STUDY: FURTHER EXAMINATION OF SELECTED AFRICAN SURVEYS:

39. The countries and the surveys that have been selected for the case study are shown in Table 12. It can be seen from the table that altogether 18 countries are included for the study, of which 6 each from North and East Africa, 4 from West Africa and 2 from Central Africa. If the languages used are taken as criterion, it can be seen that 11 are from English-speaking and 7 from the French-speaking group. All the examples are taken from surveys conducted in the 60's and the early 70's.

1. Nigeria	1961
2. Nigeria	1961
3. Nigeria	1961
4. Nigeria	1961
5. Nigeria	1961
6. Nigeria	1961
7. Nigeria	1961
8. Nigeria	1961
9. Nigeria	1961
10. Nigeria	1961
11. Nigeria	1961
12. Nigeria	1961
13. Nigeria	1961
14. Nigeria	1961
15. Nigeria	1961
16. Nigeria	1961
17. Nigeria	1961
18. Nigeria	1961

Table 12. Countries and surveys included for case study

<u>Sub-region &amp; country</u>	<u>English-speaking</u>	<u>French-speaking</u>
<u>North Africa:</u>		
1. Morocco		x(National, 1959/60 and 1970/71)
2. Algeria		x(Algiers, 1966/67) <sup>1/</sup>
3. Tunisia		x(National, 1965-68)
4. Libya	x(Tripoli & Benghazi, 1969)	
5. Egypt	x(National, 1964-65)	
6. Sudan	x(Six Northern Provinces, 1967-68)	
<u>West Africa:</u>		
7. Sierra Leone	x(1967-70, Survey of Western, Eastern, Northern & Southern provinces)	
8. Ghana	x(National, 1961-62)	
9. Togo		x(National, 1964-65)
10. Nigeria	x(Rural Economic Survey, annual since 1962-63; - urban surveys in 60's)	
<u>Central Africa:</u>		
11. Gabon		x(Survey of Woleu N'tem and Ngounie regions, 1962-64)
12. Cameroun		x(Yaounde, 1964-65)
<u>East &amp; Southern Africa:</u>		
13. Malawi	x(Urban areas and agricultural estates, 1968-69)	
14. Madagascar		x(Urban & rural, 1961-62; Tananarive, 1968-69; 4 rural zones, 1968-69)
15. Tanzania	x(National, 1968-69) <sup>2/</sup>	
16. Kenya	x(Central Province Survey, 1963-64)	
17. Ethiopia	x(Rural economic survey, 1967-68 & 1972-73)	
18. Lesotho	x(Rural surveys in Central Lowlands, North East, Mountain and South, 1967-69)	

<sup>1/</sup> The national consumption survey of Algeria, 1967-68, has not been included for the case study, due to unavailability of released information concerning the survey. <sup>2/</sup> Excludes Zanzibar and Pemba.

40. The case study will proceed under the following headings:

- A. Sample design; (not one of the headings)
- B. Definitions and classifications;
- C. Field and recording arrangements (duration of period of observation; frequency of visits, etc.); and
- D. Kind and contents of questionnaires; and
- E. Assessment of reliability.

#### A. Sample Design:

41. As was clearly indicated in Table 3 of this paper, the sample frames most commonly used in African household-economic surveys, for the first-stage sample, consist of (i) blocks or houses for urban surveys, (ii) villages or groups of villages for rural surveys; and (iii) enumeration areas (for population censuses) or blocks or villages or sections of towns for surveys of both urban and rural in type.

42. For purposes of illustration, the following surveys have been selected to indicate the various ways in which the problem of sample design has been tackled in most African household-economic surveys:

- (i) For both urban and rural surveys: Egypt, Ghana, Kenya, Tanzania;
- (ii) For surveys of rural areas only: Ethiopia, Gabon, Nigeria;
- (iii) For surveys of urban areas only: Cameroun, Libya, Malawi.

43. A description of the particular sample designs of the surveys involved is given below:

#### (a) Egypt (1964-65 family budget survey):

The survey covered the whole country, except desert areas. The country was divided into 4 main zones: (i) Metropolitan areas which include the 4 governorates of Cairo, Alexandria, Port-Said and Suez; (ii) Urban areas, which include the capitals of the 17 other governorates; (iii) Semi-urban areas, which consist of capitals of the districts in each of the 17 governorates mentioned above, which count up to 98 towns; and (iv) Rural areas which includes the 4000 villages all over the country. This zone was further divided into two groups, namely, large villages with 1000 households or more and small villages with less than 1000 households.

A fixed sample fraction of 0.1 per cent of the households was assigned to each of the first 3 zones, while the sampling fraction of 0.03 per cent was applied to the households of the fourth zone, i.e., rural areas.

A single-stage sample was used for the first 3 zones, i.e., metropolitan, urban and semi-urban areas, the selection of households from each city or town being in proportion to its size, which is measured by the total number of households contained in it. A two-stage sample was used for the rural areas. Two large and two small villages were selected in each governorate in proportion to the total numbers of households in each size group, i.e. large and small, at the first-stage sampling. Households were then selected from those villages through the taking of systematic samples, at the second-stage sampling.

(b) Ghana: National Sample Survey of Households, 1961-62:

This represents a two-stage stratified sample. Stratification was done in three stages: (i) The first-stage stratification was by administrative divisions of the country; (ii) The second-stage stratification was by degree of urbanization. Within each administrative division or region, three strata were distinguished, viz., "large town stratum", which included all towns with population of 15,000 and above, "urban stratum", which included all towns with population between 5,000 and 15,000, and the "rural stratum", which consisted of the rest of the area within each region; and (iii) Each of these strata was further divided into sub-strata in the third stage, containing approximately a population of 100,000 each, the towns and villages for the purpose being simply aggregated in the order in which they appeared in the Census lists, so as to yield a total population of approximately 100,00 in each case. This process of stratification yielded 67 sub-strata for the country as a whole, accounting for the entire population of Ghana.

The sampling units used were enumeration areas for the first stage and households for the second stage. The sample frame for the first-stage was provided by the 1960 population census, while the list of households had to be specially constructed for each selected enumeration area. For the selection of enumeration areas (E.A.'s), the procedure adopted in this case was to select from each of the sub-strata referred to above, 3 E.A.'s with probability proportional to size of population. Of the 202 E.A.'s selected in the first stage, however, as many as 37 in the rural areas had to be dropped for administrative reasons. Within each of the 165 E.A.'s that remained out of the initial total of 202, three samples of 6 households each were drawn by the method of systematic sampling making a total of 18 households per enumeration area. The selected sample therefore consisted of 2970 households, of which 1,836 were rural and 1,134 urban.

(c) Kenya: Economic Survey of Central Province, 1963-64:

The survey was undertaken in two parts - one rural and the other urban. As the urban part comprised the towns and the trading centres, accounting for only 5 per cent of the population, the sampling procedures to be described here will deal mainly with the rural segment of the survey. The sampling design used was a stratified two-stage, two-phase one with stratification at the second stage and equiprobability systematic sampling at both the stages. Firstly, the 479 sub-locations (the smallest administrative unit) in the 5 districts covered in the Survey, were rearranged into 535 primary sampling units (PSUs) of roughly equal population, of which 45 were selected systematically on an equal probability basis after arranging the primary units in continuous geographical sequence. Since the first stage sampling frame consisting of sub-locations (from which the PSUs were constituted) was prepared by arranging the sub-locations in administrative order, i.e., by district, division and location, the systematic selection of every 12th PSU resulted in automatic first stage stratification by districts and divisions.

All the households in these 45 selected PSUs were listed out in the first phase of the survey and were grouped into three strata according to size of operational holdings. The second stage sample was also selected systematically with varying sampling fractions for each stratum. The sampling intervals for the three strata were determined so as to select 360 households (a third of the total sample) within each stratum from the 45 selected PSUs. In all, 1,080 households were selected and enumerated. Of this total, 180 households had to be excluded from the analysis on account of defective information collected. The remaining 900 households analysed represented a sampling fraction of 0.32 per cent of the total number of households of the Central Province.

(d) Tanzania: Household Budget Survey, 1968-69:

The Survey covered the whole of Tanzania mainland, excluding Zanzibar and Pemba. A two-stage sampling plan was adopted. For the mainland of Tanzania (excluding the city of Dar-es-Salaam), 259 enumeration areas (EAs) were selected at random from some 25,000 listed at the time of the Population Census of August 1967. A listing of households in the selected EAs was subsequently carried out, including collecting of information on annual cash income and expenditure of the households. The lists provided the sampling frame for the selection of households, while the data on annual cash income provided a criterion for stratification of households for such selection.

For the city of Dar-es-Salaam, a separate sample of 50 enumeration areas was listed. All the households listed therein were classified into three income groups and a weighted sample of 9 households were selected from each enumeration area. For the selection of the 50 EAs mentioned above, stratification was used. Dar-es-Salaam City was divided into two geographical strata: one stratum was formed by areas for which the households' incomes are considerably higher than for the other parts of the city. The remaining areas formed the second stratum. The stratum of higher income areas comprised 70 EAs with about 6,000 households, as compared to the 412 EAs with 77,000 households for the stratum of lower income areas. From each stratum 25 enumeration areas were sampled.

(e) Ethiopia: Rural Household Expenditure and Consumption Survey, 1966-68:

The survey covered the entire rural area of the 12 provinces out of the 14 excluding the provinces of Bale and Writrea and some inaccessible and nomadic areas. The basic sampling frame was provided by data collected in the first round of the National Sample Survey. A total of 1,677 rural households were interviewed in the survey.

With the exception of one province, viz., Shoa, which had a three-stage sampling plan, the remaining provinces covered by the survey had a four-stage sampling plan, the sampling units being mikiti woredas (sub-districts), balabats (first rank officials), chikashums (second rank officials), and households. Sampling at each stage was done with probability proportional to the number of households. Finally, the households in each selected chikashum were listed and 12 were selected at random.

(f) Nigeria: Rural Economic Survey (Annual):

The rural household consumption survey of Nigeria forms part of a multi-purpose survey entitled the Rural Economic Survey, which covers most parts of the country and is known to have been held annually since 1962/63. In 1963/64, the sample included 192 village units of study of approximately 2,000 adult male population. In 1964/65, the number of village units of study was expanded to 204.

The sampling was carried out in two stages: village units and households. The first stage sample units were groups of the 1963 Census enumeration areas with population of 1,500 to 3,000 persons. These units were selected with probability proportional to population. The sample frame was provided by the alphabetical listing of villages within each district as given in the Census Bulletins and the cumulative district population figures. A complete household listing was then performed in each sampled

village unit. From this listing a Master Sample of 50 households was selected randomly. The first 24 households on the master sample list were taken for the rural household consumption survey. Of the 24 households, the first 18 were actually used for the consumption survey while the remaining 6 were kept as substitutes.

(g) Gabon: Household Budget and Living Conditions Survey of N'Gounie Region, 1963-64:

The survey covered a rural region in Gabon and the sampling scheme used was quite a straight forward one. It consisted in sampling in two stages: villages and households. The alphabetical listing of villages in each district used in the 1960-61 demographic survey of Gabon provided the necessary sampling frame. Villages were selected at random with probability proportional to the number of households in each village. A listing of households in the 50 villages thus selected was subsequently carried out. Households were divided into two strata: one consisted of those with less than 5 persons and the other of households with five persons or more. In each selected village, 5 households were selected at random: two from each of the two strata of households and the fifth from either of the two strata alternately.

(h) Cameroun: Levels of Living Survey, Yaounde, 1964-65:

A two-stage sample was taken, consisting of blocks and households. As information provided by the census of 1962 was somewhat out of date at the time the Survey was undertaken, a special aerial survey of Yaounde in the scale 1:5000, carried out in December 1963 and January 1964, provided the necessary sample frame for blocks. For the purpose of demarcating blocks, the city was divided into 4 strata from the housing point of view, viz., (i) modern buildings, (ii) government employees' quarters, (iii) peripheric zone sparsely populated, and (iv) traditional housing zone with dense and average density of population. The demarkation into blocks was done such that there would be 4 dwelling units per block. Altogether 551 blocks were marked. In selecting the blocks for inclusion in the sample, varying sampling fractions were used in respect of the different strata: (i) and (ii) were included 100%; while the sampling fractions for (iii) and (iv) were 1/4 and 1/8 respectively. A total of 120 blocks were thus selected.

For sampling at the second stage, a listing of dwellings was carried out in the selected blocks. The dwellings were classified into 8 categories in accordance with the occupational classification of the adults of each dwelling, viz., (1) the public and semi-public sector, (2) modern industry and commerce, (3) handicraft, (4) domestic services, (5) miscellaneous, (6) agriculture,



(7) prostitution, and (8) population inactive. Within each of the 8 categories, the dwellings were classified in decreasing order of number of inhabitants. A systematic sample of dwellings were then selected, and all the households included in the selected dwelling (or building) were included in the inquiry.

(i) Libya: Household Expenditure Surveys of Tripoli and Benghazi Towns, 1969:

The sample design was a two-phase one-stage one. In the first phase, a relatively large sample (about 2% of the parent population) was selected. The first-phase sample was drawn in clusters of 5 households by means of systematic selection with a random start, using the 1964 Population Census records as a frame. In addition, a supplementary sample was selected from lists of building permits issued between 1964 and 1967 to allow for dwellings built after the census. The selected sample was distributed proportionally among various districts; non-Libyan households were excluded. All the dwellings selected in the sample had to be interviewed even if these dwellings were occupied by some other householders different from those reported in the sample lists. If the dwelling was occupied by the same householder the household was defined as an "original unit", otherwise the household was defined as a "substitute unit". In case the dwelling could not be located, another household, defined as "replacement unit", was to be selected in the field to complete the number required in each cluster.

The second phase sample was selected from the first-phase one by applying stratification with unequal sampling fractions. Stratification was double controlled using the information, obtained in the first phase, on household income and size of household. These two variables were considered as the most highly correlated variables with household expenditure. Accordingly, the households in the first-phase sample were divided into 3 income strata and in each stratum the households were listed in order of size. A systematic sample was then selected from each stratum according to its assigned sampling fraction with an overall sampling fraction of 0.6.

(j) Malawi: Household Income and Expenditure Survey for Urban Areas and Agricultural Estates, 1968-69:

The survey covered the towns and urban areas which account for about 7% of Malawi's population, but "probably two-thirds of the private monetary consumption expenditure" of Malawi.

A two-stage sampling method was adopted. The universe was stratified into three areas, viz. (a) major urban areas, which consisted of 4 towns, i.e., Blantyre, Zomba, Lilongwa and Mzuzu; (b) small urban areas; and (c) agricultural estates.

For each of the 4 towns, segments of 10 households were created and 50 such segments were selected in each town and all 10 households of each selected segment were interviewed. The selection procedure was as follows: In Blantyre, a random sample of 30 from the 90 enumeration areas of the 1966 Population Census was drawn. These EAs were divided into three to five sections each depending on the distribution of population within the EA. In each of these sections, one cluster of 10 households was marked out giving a total of 125 clusters. Of these, 50 were selected such that each E.A. was represented at least once and no more than twice in the sample. In the other 3 towns, all E.A.s were used and clusters were constructed and selected as in Blantyre.

For the small urban areas, 25 such areas were selected out of a total of 66, with probability of selection being proportional to size of population. The selection of households within each selected area was carried out by the interviewing teams in the field. Each selected urban area was divided into clusters (quadrants or halves, depending on the population), one cluster was selected randomly, the tally of houses within the cluster was divided by the number of households to be interviewed to give the sampling interval. A similar sampling procedure as for the small urban areas, was used for agricultural estates: 25 estates were selected out of a list of 227. The sub-sampling was done by the interviewers using estate settlements as clusters.

44. The description given above of the sample designs of 10 African countries' household economic surveys, does not imply either criticism or approval of the particular designs used. The examples served to illustrate the various ways by which the countries concerned tackled their specific problems in respect of sample design. Often the existence or non-existence of particular sample frames and the constraints such as the availability of field enumerators and funds, dictated the particular sample designs actually used.

#### B. Definitions and Classifications:

45. To be treated under this heading are definitions of selected terms used in the household budget surveys of countries of the region and some classifications. These concern the definitions of the household, head of the household, income, expenditure, and saving, and the classification of household heads by socio-economic groups. The extent to which the country practices comply with the definitions required in the proposed international System of Statistics of the Distribution of Income, Consumption and Accumulation<sup>1/</sup> will also be touched upon.

1/ A Draft System of Statistics of the Distribution of Income, Consumption and Accumulation, op. cit.

(a) Definition of the household:

46. Both the housekeeping and the family concepts of the household are included in the recommendations of the 1970 Censuses of Population and of the SNA. For the developing countries, however, it is to be preferred that the housekeeping concept should be used. The latter concept defines the household as a "group of one or more persons who occupy the whole or part of one housing unit and make joint provision for food or other essentials of living."

47. From the 18 African countries' recent household surveys as listed in Table 12 of this paper, it is found that ten countries spelled out explicitly the definition of the household used in these surveys. The majority of them adopted definitions more or less in keeping with that recommended internationally, i.e., the housekeeping concept of the household, while divergences from it were recorded also in a number of cases. A summary of the definitions used is given below:

- (i) Countries that included the living, eating and budgeting aspects of the housekeeping concept of the household: These included Egypt, Ethiopia, Kenya, and Libya. The definition used by Kenya may serve as a good example: "A group of persons, generally of the same family, normally living together, sharing meals and operating a common cash account" (Kenya: Central Province Survey, 1963-64);
- (ii) Countries that emphasised the eating aspect only: Malawi and Nigeria.<sup>1/</sup> For example, the definition of the household was given as:  
 "A group of persons who eat together.." (Malawi: Household Income and Expenditure for Urban Areas and Agricultural Estates, 1968);  
 "A group of people who eat together from the same pot, even if not living under the same roof." (Nigeria: Annual Rural Economic Survey);
- (iii) Countries that emphasized the eating and living aspects only: Algeria, which defined the household as "A group of persons living under the same roof taking habitually their food in common" (Household Consumption Survey of Algiers, 1966-67);
- (iv) Countries that emphasized the budgeting aspect only: e.g., Togo, which defined the household as "A group of persons depending on the head, who alone has authority over the total receipts and expenses of each member of the group." (Family Budget and Household Consumption Survey, 1964-65);
- (v) Countries that emphasised the eating and budgeting aspects of housekeeping, with only loose or no mention of the living (i.e., housing) aspect of it: e.g., Madagascar, Gabon. In Madagascar's Urban Household Budget Surveys of 1961-62, the household was defined as "a group of persons pooling their incomes, totally or partially, in order to meet their essential needs particularly

<sup>1/</sup> In Nigeria's urban surveys of the 60's, however, the household was defined as "a group of people who live together and eat from the same pot."

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...for their food needs. In the country's 1962 Rural Household Budget and Food Consumption Survey, the need for members of a household to live in the same housing unit was only loosely referred to. Thus, the household was defined there as "an elementary family group living in common in one or several housing units, sharing generally their meals and pooling together their resources." (vi) Countries that adopted a highly flexible concept of the household, which corresponds to either a budgetary or a food consumption unit, as the case may be, e.g., Tunisia. In the country's Household Consumption and Expenditure Survey of 1965-68, the household was defined as "the budget unit if the latter corresponded to several food units, or the food unit if the latter corresponded to several budget units." A food unit was defined for the survey as "a group of persons for whom food is generally prepared together". As is clear from the above, rather divergent definitions of the household have been used in various countries' budget surveys. In order to improve international data comparability, it would be desirable if the definition as stated in Paragraph 46 could be applied in all future such surveys in African countries.

(b) Definition of the head of the household:

49. Relatively few countries cared to spell out the definition of the head of the household that was used in their household budget surveys. It may be presumed that the internationally recommended definition as given in the SNA, i.e., as the individual who is generally recognised as such, has in fact been followed in the majority of cases. However, in some surveys of the French-speaking group, the income aspect of the functions of a household head appears to have been specifically emphasised. For instance, the head of the household has been variously defined in several countries surveys as:

"The person (man or woman) who brings to the household the highest income." (Algeria: 1966-67);

"The person who receives the incomes of the members of the household and decides on the uses of these resources." (Togo: 1964-65);

"The head of the budget unit who decides himself (or his wife through delegation of authority) on the current expenditures of his household and effects corresponding transactions." (Tunisia: 1965-68).

(c) The concept of income:

50. On the concept of income used in most African household budget surveys, the statement made in an earlier secretariat paper<sup>1/</sup> remains valid. That is, income in these surveys has been vaguely treated as equal to the available income gross of tax deductions. The available income is as defined in the U.N. document E/CN.3/425, i.e., as equivalent to the sum of distributed factor income (that is, the sum of compensation of employees and entrepreneurial income and net property income received by households) and net current transfers received. In some cases, because of difficulties in estimating the value of incomes received in kind (e.g., wages and gifts in kind, consumption of own production), the coverage has been limited to monetary incomes only. In a few other cases, for convenience in classifying households by income groups for cross-tabulation with other variables, the concept of income has been extended to equal that of total receipts or resources; that is, including receipts of a capital nature, such as loans raised and loan repayments received, withdrawals from savings, etc. In several cases, gifts and loans were classified together as a current transfer, because of difficulties of distinguishing one from the other. More on the concept of income will be dealt with in a later section of the paper, when the contents of the questionnaires used in selected African household budget surveys will be examined in detail.

(d) The concept of expenditure:

51. The U.N. document E/CN.3/425 defines the final consumption expenditure of households to "cover all goods and services they (i) purchase, (ii) produce on own account, including the services from owner-occupied dwellings, and (iii) receive as income in kind for household, but not enterprise, use."

52. Few countries of the region have provided explicit definitions of the expenditure concept they used in their household budget surveys. As will be examined in greater detail in a later section of this paper, the questionnaires used in the majority of the household budget surveys carried out in the 60's do provide the necessary elements with which the U.N. concept of final consumption expenditure of households as stated above could be approximated. The following definitions of expenditure as used in three countries' recent surveys appear to be of interest:

- (i) Ethiopia: "Domestic expenditure" was defined in the country's 1966-68 rural consumption survey as "expenditure in cash or in kind on all items of household consumption". It excluded the "value of goods and services bought by it as well as payments in cash or kind for the purposes of its enterprise or for transfer to the outsiders (other households, government, etc)";

<sup>1/</sup> Data Sources and Country Practices in the Compilation of Income Distribution and Related Statistics in Africa (E/CN.14/NAC/30), October 1968.

- (ii) Libya: For the household budget surveys of Tripoli and Benghazi, 1969, expenditure was defined as "the expenses incurred by the household in purchasing commodities and services during the reference period, whether such expense is made in cash, or on credit, or on barter basis, regardless of the time of delivery or consumption of these commodities.";
- (iii) Sudan: For the country's urban and rural household consumption surveys carried out in 1963 (e.g., Wadi Halfa, Omdurman, etc.), current expenditure was defined according to the "delivery" principle, that is, as the total value of all goods and services delivered to the household, whether bought by cash or credit, home-produced or otherwise obtained.

(e) Definition of saving:

53. Saving is defined in the complementary system of statistics of the distribution of income, consumption and accumulation, as equal to available income less personal consumption and contributions, plus the benefits from private pension funds and premiums and in the case of annuity policies, net of service charges. Apart from the saving in the form of additions to the households' equity in pension funds and life insurance reserves, this flow relates to funds which are actually in the hands of, and under the immediate control of, households for purposes of investment<sup>1/</sup>.

54. Up to now, very few countries in the region provided tabulations or the definition of savings in their household budget survey reports. In most cases, savings have been taken to equal excess of reported total current receipts over reported total current expenditure. A fuller discussion on the countries' practices in this respect will be taken up in a later section of this paper, when the contents of questionnaires will be examined.

(f) Classification of households into socio-economic classes:

55. As stated in document E/CN.3/425, a standard international classification of socio-economic classes has not yet been adopted. The classification that is proposed for purposes of the complementary system<sup>1/</sup>, contains the following major socio-economic groups:

1. Employers and own-account workers in agriculture;
2. Employers and own-account workers outside agriculture;
3. Employees in agriculture;
4. Employees outside agriculture;
5. Economically inactive persons living in households; and
6. Persons living in institutions.

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<sup>1/</sup> A Draft System of Statistics of the Distribution of Income, Consumption and Accumulation (op. cit.): paragraphs 140, 155 & 156, and Table 2.

56. Various socio-economic or socio-occupational groups have been used in selected African household budget surveys, in particular, among the Franco-phone countries. As Table 13 will show, they do not fit into any regular pattern. Examples of these classifications used are given below:

- (i) Algeria (Household Consumption Survey, Algiers, 1966-67): 13 groups. Socio-economic groups distinguished: Agricultural workers; employers; top-level professional and technical personnel and professions; merchants; craftsmen; middle-level professional and technical personnel; employees; qualified skilled workers; other persons economically active; domestic servants; public security; retired and pensioned persons; economically inactive.
- (ii) Cameroun (Level of Living Survey in Yaounde, 1964-65): 19 groups. Socio-occupational groups distinguished: Professional and technical workers trained abroad; other professional and technical workers; army and police; daily labourers; workers in commerce and transport; employees in industries and the building trade; employees of diplomatic missions, etc.; taxi owners and operators; craftsmen; owners of shops and bars; wage-earners; employees in service trades; petty traders; domestic servants working with expatriate families; domestic servants working with Camerounian families; farmers; prostitutes; inactive persons; and unemployed.
- (iii) Gabon (Household Budget and Conditions of Livings Survey in Woleu N'tem Region, 1963-64): 6 groups. The groups distinguished include: Plantation owners and operators living at or near an administrative centre; plantation owners and operators living in a village with road facilities; plantation owners and operators living in isolated villages; farmers; wage and salary earners; and merchants and craftsmen.
- (iv) Ghana (1961-62 Household Budget Survey): 9 groups. The socio-economic groups distinguished include: Employer (with 10 and more employees); employer (with less than 10 employees); self-employed; employee; housewife; unpaid family worker; retired pensioner; living on private means; and economically inactive.
- (v) Ivory Coast (1956 Family Budget Survey of African Wage-earners in Abidjan): 6 groups. The socio-economic groups distinguished include: Employees, public sector; employees, private sector; labourers; skilled and semi-skilled workers, public sector; skilled and semi-skilled workers, private sector; and officials.
- (vi) Madagascar (1961-62 Urban Family Budget Surveys): 8 groups. The socio-economic groups distinguished include: Top-level and middle-level professional and technical workers; employees and clerical workers; craftsmen; skilled and semi-skilled workers; merchants; own-account workers, including the professions; farmers; persons without work or retired; and labourers and domestic servants.

- (vii) Morocco (Household Consumption and Expenditure Surveys, 1959-60 & 1970-71): 7 groups for the urban, and 4 groups for the rural, areas were distinguished in the 1959-60 Survey. The socio-economic groups distinguished for urban areas include: Craftsmen; merchants; domestic servants; Skilled and semi-skilled workers; employees; government officials and the military; and professional and technical personnel. Socio-economic groups distinguished for rural areas include: Workers in agriculture; employers in agriculture; craftsmen; and merchants.
- For the National Household Consumption and Expenditure Survey of 1970-71, a total of 10 socio-economic groups were to be distinguished, namely, Scientific, technical and professional personnel; Top-level administrative personnel; office employee (clerks & typists); Merchants (wholesalers, retailers, shop assistants); Owners and operators of agricultural holdings; Workers in agriculture; Workers in industry and mining; Workers in transport and services; Craftsmen; Active population not classified; Inactive population.
- (viii) Nigeria (Urban Consumer Surveys, 1959/60 - 1964/65): 7 groups. The socio-economic groups distinguished include: Employees (for Lagos only); clerks; artisans; labourers; traders; farmers; and others.
- (ix) Sudan (Wadi Halfa Survey, 1963): 9 groups. The socio-economic groups distinguished (for urban households only) include: Higher incomes; agriculture; drivers, masons; blacksmiths; policemen, dressers; clerks, teachers; bucketmen, street cleaners; unskilled workers in government service; households with women as head; and outside government and with irregular income.
- (x) Tunisia (Household Consumption and Expenditure Survey, 1965-68): 6 groups. The socio-economic groups distinguished include: Workers in agriculture; employers in agriculture; merchants; craftsmen; employees outside agriculture; and economically inactive and others.

57. In the case of Algeria, Gabon, Ghana, Madagascar, Morocco, Nigeria and Tunisia, data on household consumption expenditure and/or household receipts, have been tabulated according to these socio-economic groups.



Table 13. Socio-economic groups distinguished in selected African household budget surveys

	Algeria (1966-67)	Cameroun (Yaoundé 1964-65)	Gabon (1965-66)	Ghana (1961-62)	Ivory Coast (1956)	Madagascar (1961-62)	Morocco (1959/60)	Morocco (1970-71)	Nigeria (urban, 1960's)	Tunisia (1965-68)
A. Employers and own account workers in agriculture:										
1. Farmers	X	X	X			X			X	
2. Owners and operators of agricultural holdings	X									
3. Owners and operators of plantations										
4. Employers in agriculture										X
B. Employers and own-account workers outside agriculture:										
5. Employers	X			X						
6. Self-employed	X	X	X	X		X	X			
7. Merchants & petty traders	X	X	X	X		X	X		X	X
8. Craftsmen	X	X	X	X		X	X		X	X
9. Taxi owners and operators	X									
C. Employees in agriculture:										
10. Agricultural workers										X
D. Employees outside agriculture:										
11. Top-level professional & technical personnel and professions	X	X <sup>2/</sup>				X	X <sup>2/</sup>	X <sup>2/</sup>		
12. Middle-level professional & technical personnel	X									
13. Officials						X	X <sup>6/</sup>			
14. Public security (or army & police)	X	X								
15. Employees	X			X	X	X <sup>4/</sup>	X			X
16. Skilled & semi-skilled workers	X <sup>1/</sup>			X	X	X	X			
17. Labourers		X		X	X	X	X		X	
18. Wage earners		X	X	X	X	X	X		X	
19. Office employees (clerks & typists)							X			
20. Employees in commerce & transport		X					X <sup>8/</sup>			
21. Workers in industries & building		X					X <sup>2/</sup>			
22. Employees in service trades		X								
23. Domestic servants	X	X				X	X			
24. Employees in diplomatic missions		X								
25. Top-level administrative personnel							X			
E. Economically inactive populations living in households:										
26. Economically inactive	X	X					X			X
27. Retired and pensioned persons	X									
28. Unemployed		X								
29. Housewife				X						
30. Unpaid family worker				X						
31. Living on private means										
F. Persons living in institutions										

1/ Qualified skilled workers.

4/ Employees and clerical workers.

7/ Scientific, technical and professional personnel.

2/ Owners of shops and bars.

5/ Professional and technical personnel.

8/ Workers in transport and services.

3/ Professional and technical workers trained abroad.

6/ Government officials and the military.

9/ Workers in industry and mining.

### C. Field and Recording Arrangements:

58. The frequency of visits and duration of period of observation for the selected surveys of the 18 countries of the region, as listed in Table 12, are shown in Table 14. From it, it can be seen that 6 surveys, of which 3 urban and 3 rural, required daily visits for one month or longer; 11 surveys, comprising 1 urban, 4 rural and 6 both urban and rural, required daily visits for one week or more but less than a month; 3 surveys, consisting of 1 urban, 1 rural and 1 both urban and rural, required weekly visits only; and 4 surveys, of which 1 urban and 3 both urban and rural, required monthly visits only. In the last-mentioned case, the recall period would stretch for as long as a 30-day period. The implications of this recording arrangement in terms of accuracy of data on food and other consumption expenditure in current African conditions will be discussed in a later section of the paper dealing with assessments of reliability of the survey results.

59. As a means of aiding memories, a number of countries have introduced the keeping of notebooks in their surveys of household consumption. These included Egypt (1964-65 survey), Libya (1969 surveys of Tripoli and Benghazi), Madagascar (Tananarive survey, 1968-69), Nigeria (urban consumption surveys in the 60's), Sudan (1967-68 survey) and Tanzania (1968-69). The effectiveness of the notebook method to improve the accuracy of reporting is yet to be proven.

60. The complexities in the recording methods followed vary from country to country and from survey to survey... Some countries made daily weighing of foods consumed as a necessary means for obtaining estimates of food consumption, in particular, the consumption of own production; some countries appear to have relied mainly on interviews, resorting to actual weighing only occasionally. In order that the survey results can be appreciated fully, a description of the actual recording arrangements followed will be given in respect of the frequency of household visits and the duration of the period of observation as follows:

- (a) Daily visits for one month or more;
- (b) Daily visits for one week or more, but less than a month;
- (c) Weekly visits; and
- (d) Monthly visits.

Table 14. Selected household budget surveys by frequency and duration of interviewers' visits to households

<u>Sub-region, Country &amp; Year of Survey</u>	<u>Daily visits for 1 month</u>	<u>Daily visits for 1 week</u>	<u>Weekly visits</u>	<u>Monthly visits</u>
<b>North Africa:</b>				
1. Morocco (National survey, 1959-60)		$x(U+R)$	$\frac{1}{1}$	
( " " " " , 1970-71)		$x(U+R)$		
2. Algeria (National, 1966-68) . . . . .		$x(U+R)$		
3. Tunisia (National, 1965-68) . . . . .		$x(U+R)$		
4. Libya (Tripoli & Benghazi, 1969)		$x(U+R)$		
5. Egypt (National, 1965-66)			$x(U)$	
6. Sudan (6 Northern Provinces, 1967-68)				$x(U+R)$
				$x(U+R)$ , for one year
<b>West Africa:</b>				
7. Sierra Leone (4 provinces, 1967-70)		$x(U+R)$		
8. Ghana (National, 1961-62) . . . . .			$x(U+R)$ , for 3 months	
9. Togo (National, 1964-65) . . . . .		$x(U+R)$		
10. Nigeria: Rural surveys . . . . .	$x(R)$	$\frac{1}{1}$		
Urban surveys . . . . .	$x(U)$			
<b>Central Africa:</b>				
11. Gabon (2 rural regions, 1962-64)	$x(R)$	$\frac{1}{1}$		
12. Cameroun (Yaounde, 1964-65) . . . .	$x(U)$			
<b>East Africa:</b>				
13. Malawi (main towns, 1968-69) . . .				$x(U)$
14. Madagascar: Urban, 1961-62 . . . . .		$x(U)$ , 3. per week		
Rural, 1962 . . . . .		$x(R)$		
Tananarive, 1968-69	$x(U)$			
4 rural zones, 68-69		$x(5 \text{ days for food})$		
15. Tanzania (National, 1968-69) . . . .				$x(U+R)$ , for 1 year
16. Kenya (Central Province, 1963-64)	$x(R)$			
17. Ethiopia: Rural survey, 1967-68		$x(R)$		
" " " " , 1972-73		$x(R)$		
18. Lesotho: Rural survey, 1967-68			$x(R)$ , for 1 year	
	6	11	3	4

1/: U stands for urban; R stands for rural; and U+R stands for both urban and rural.

(a) Daily visits for one month or more:

61. As can be seen from Table 14, included under this heading are the urban and rural consumer surveys of Nigeria held in the 60's, two rural surveys in Gabon, the 1964-65 survey of Yaounde, Cameroun, the 1968-69 survey of Tananarive, Madagascar, and the 1963-64 Central Province Survey of Kenya. The recording arrangements followed in these surveys will be briefly described as below:

(i) Nigeria: Included are the urban surveys conducted during the period 1959/60 - 1966/67, in such urban centres as Lagos, Ibadan, and a dozen or so other towns. The selected households were supplied with notebooks in which to record all daily payments and receipts. These were recorded by a literate member of the household, or in some cases, by the enumerator. As a preliminary exercise, the households were studied throughout the week preceeding the survey month. This study was designed to get informants accustomed to recording the required information on receipts and payments. Informants were interviewed daily at their homes in the evenings by enumerators. At each visit the enumerator copied from the household notebook recorded details of receipts and payments for the day. The data thus copied the previous evening were examined in the morning at the survey office by the supervisor who queried doubtful entries and marked obvious errors for correction. The households were visited daily by the enumerators for one month.

In the case of the country's rural surveys, the consumption survey constituted part of the annual Rural Economic Survey. A team of 2 enumerators was assigned to each unit of study (village or village group) for the entire crop year. The consumption survey was done in 24 weekly periods made up of 12 two-week periods spaced evenly throughout the crop year (May to April). A group of 3 households was studied during each of the 24 weekly periods. From the first 24 households on the Master Sample list used for the Rural Economic Survey, for each selected unit of study, the first 18 were divided into 6 groups of 3 households each. Each such group was studied for one week each in rotation during the 24 periods. Thus each group of 3 households was studied 4 times during the year. Information on both consumption of food items and other expenditure was collected through daily visits. Wherever possible actual weighing was carried out. The "Accounts Method" was not used due to high degree of illiteracy among the rural population to be interviewed.

(ii) Gabon: In the surveys in two rural regions carried out in 1963-64, the selected households were visited daily for 4 weeks for information on household budget and for one week for information on food consumption;

- (iii) Cameroun: The selected 120 blocks at the first stage were divided into five sections, corresponding to 5 periods of observation of 30 days each. The survey was carried out in one year's duration, each block being the object of observational cycles at 6-monthly intervals. Each selected household was visited daily for one month to complete the daily questionnaires on consumption and expenditure and general and retrospective questionnaires.
- (iv) Madagascar: Daily visits for 30 consecutive days were required in the case of the 1968-69 household budget survey of Tananarive. Log books in which to make daily entries of occasional expenses and exceptional receipts for one month by all earning members of the household, were deposited with the households included in the sample. "Occasional expenses" were defined as all amounts bigger than 500 CFA francs spent on things other than food, repairs and personal care. "Exceptional receipts" were defined as receipts not connected with the professional activity of members of the household, e.g., sales of vehicle, land, etc. Altogether 3 passages were made in the case of each household: the first passage to leave the log books with each earning member of the household, noting the number of these books deposited with the household, and fill a questionnaire on an inventory of household durables and equipment at the beginning and end of year (in quantity); the second passage consisting of daily visits for one month; and the third passage being one visit to the household one year after the survey period. It is worth noting that, for the urban surveys of 1961-62, which covered 6 major towns including Tananarive, a much simpler field procedure was followed. In the latter case, each household was observed for 7 consecutive days only. A total of 3 household visits were to be made: 1st visit to deposit the log books; 2nd visit (2 or 3 days after the first) to check the keeping of these books by household members; and the 3rd visit (8 to 10 days after the first) to collect the log books and complete questionnaires if necessary.
- (v) Kenya: For the 1963-64 Central Province Survey, the selected households were interviewed every fortnight over a one-year period (March 1963 to February 1964), the accounts thus covering a whole year and two crop seasons. On each such visit, the household was asked to give information about production, sales, purchases and other economic transactions during the previous 14 days. In addition, twice during the survey period (with an interval of 6 months), each household was subject to daily visits for 4 weeks, resulting in daily records for 8 weeks. These daily visits were intended primarily as a check on the reliability of the fortnightly returns and to collect detailed information on food consumption. Towards the end of the survey period, all plots operated by the households were measured to study land utilization and also as a check on the total acreage figures given earlier by the households.

(b) Daily visits for one week or more, but less than a month:

62. Included under this heading (See Table 14) are the national consumption surveys of Morocco, 1959-60 and 1970-71, the national household consumption survey of Algeria, 1966-68, the national survey of Tunisia, 1965-68, the household consumption surveys of 4 provinces in Sierra Leone, 1967-70, the national survey of Togo, 1964-65, the 1962 rural household consumption survey of Madagascar and the 1968-69 surveys in 4 rural zones, and the rural surveys of Ethiopia, 1967-68 and 1972-73. A brief description of the field procedures and recording arrangements used in these surveys is given below:

(i) Morocco: In the 1959-60 household consumption survey, the recording arrangements differed in respect of food and non-food expenditure. Food expenditure was recorded for a smaller number of households than for non-food expenditure.

- Food expenditure: In rural areas, the households were visited 3 times daily for 7 consecutive days, at the time of the meals. At each such visit, the quantity of foods entering into the meals were weighed (sometimes estimated), with the origin of the foods (purchased, gifts or payments in kind), their quantity and value (or quantity only in the case of consumption of own production) registered. In urban towns, the households were visited once a day only for 7 days. No weighing of foods was normally involved. The foods in stock for the first and the last days of the survey week were taken. The weekly consumption of foods was estimated by the formula:

Weekly consumption = Purchases + Receipts in kind + stock of foods at beginning of week - stock of foods at end of week.

- Non-food expenditure: 4 visits at intervals of 35 to 45 days in between, were effected to obtain information on purchases of non-food current consumption items and on purchases of household durables. The recorded purchases covered a period of about 115 days. The annual consumption data were obtained by raising the recorded purchases by the ratio 365/115.

For the national consumption survey of 1970-71, daily visits for a week to a household were also effected. In addition to the daily recordings of food consumption, separate records for consumption of own production during the survey week were also kept.

(ii) Algeria: The household consumption survey of Algiers, 1966-67, involved daily visits to households for one week and two further weekly visits. The procedure of recording was as follows:

1st day: recording of daily expenses for the preceeding week and the 1st day. 2nd to 7th days: recording of daily expenses for previous day only. Call back on the 14th day (i.e., a week later) and the 21st day (i.e., 2 weeks later) for non-food expenditures in past week. During the survey period the household's purchases of durable goods during the past 12 months, should also be recorded through use of retrospective questionnaires.

(iii) Tunisia: The recording arrangements used in Tunisia's household consumption survey of 1965-68 were particularly meticulous and deserve special mention. The procedures used differ in respect of information on food consumption and on household budget. They also differ in respect of the various regions of the country. A special survey to measure the expenditure pattern during the month of Ramadan was also instituted. A description of the actual procedures followed with respect to food consumption and household budget is given below:

- Weighings of food consumption: For the rural areas, more than a half of the households included in the sample were observed in their food consumption by actual weighing. In North, 1/3 of the households were visited for 3 days for this purpose; another 1/3 of the households for 7 consecutive days; and the remaining 1/3 were not studied. In the South and the Centre, two methods were followed: (a) for the communes and big population centres, 3/4 of the households were observed for 3 days; and (b) for the rest (i.e., small population centres and isolated households), 1/4 of the households were observed for 7 days; another 1/4 for 3 days and the remaining 2/4 by the record of a single day.

- Information on budgets: This covered information on consumption expenditure. The procedures used differ with respect to different items of consumption:

(a) For current food consumption expenditure: For the North, daily visits for 7 consecutive days; for the South and the Centre, and the big towns, visits every other day for one week. During each such visit, the interviewer registered expenses for the preceeding day and the current day.

(b) For non-food current expenditure, two methods were used: (i) recording on a daily basis (for the North) or every other day (for the South and the Centre), for one week; and (ii) by a retrospective weekly recording, periods used for the recording being 7 days for the North, 10 or 3 days for the South and the Centre, and 10 days for the big cities. The non-food expenditure was recorded for 3 weeks for the North, the South and the Centre, and for one month for the big cities.

(c) For non-current expenditure and purchases of food items in bulk, in addition to being recorded as for non-food current expenditure as described in (b) above, these were done retrospectively: (i) for rural areas: one recording per month for one trimester and three 3-monthly recordings for the rest of the year; (ii) for the big cities: 6 monthly

visits for the first six months, plus 1 bi-monthly and 1 tri-monthly visits.

**Expenditure pattern during the month of Ramadan:** In order to study the expenditure pattern during the month of Ramadan, a special study was made in the North. The study covered two-thirds of the Primary Sampling Units of the North. For each P.S.U. retained, 1/3 of the sub-units were studied for daily food consumption and other expenses. Each household was observed for a consecutive 7 days for the recording of daily expenses, and 2 days for the weighing of food consumption. For the remaining period of the study, weekly recordings of non-food expenses and purchases of foods in bulk were made. For the remaining 2/3 of the sub-units which were not studied for daily expenditure and food consumption, three retrospective weekly recordings were made. This study covered a period of 40 days, comprising 30 days of the month of Ramadan and 5 days preceding and 5 days after it.

(iv) **Sierra Leone:** The procedures refer to the surveys held in the urban areas of the Northern, Southern and Eastern Provinces and the Western Area of Sierra Leone during 1966-69. Apart from the Western Area, for which the selected households were interviewed daily for one month, the households in the remaining provinces were interviewed daily for a week and weekly for a period of one month. At the end of the 4th week questions about savings, debts, major household expenses and income relating to the past month, were asked. Interviewing was again carried out later with 1/3 of the households in the sample to obtain expenditures over the holiday seasons including Christmas and Ramadan.

For the Western Area, the sample was divided into 4 parts and each sub-sample was interviewed daily for one month from April to August, 1967. These months were considered to be representative of the normal wet and dry seasons. Interviews during December and January were held to obtain expenditure data during holiday seasons. The results in the two interviewing periods were combined together to arrive at annual figures by giving the normal period a weight of 10 and the holiday period a weight of 2.

(v) **Togo:** In the national household consumption survey of Togo, 1964-65, a rather complicated data collection procedure was followed in the field. Essentially three types of inquiries were included, viz., a budget inquiry, a budget nutrition inquiry and retrospective inquiry. The procedures differed in respect of urban and rural areas as follows:



- For Lome and Be: The inquiries effected consisted of a budget inquiry requiring daily visits for 30 consecutive days, and a budget nutrition inquiry on a reduced number of households requiring daily visits for 7 consecutive days;
- For other urban centres: The recording arrangements consisted in a budget inquiry of 7 consecutive days in the first semester and another 7 consecutive days six months later; a budget nutrition inquiry, involving daily visits of 7 days each in two rounds at the same time as for the budget inquiry; and a retrospective inquiry, which involved 4 visits at 3-monthly intervals between visits;
- For the traditional rural areas: Two rounds of visits of 7 consecutive days each for both budget and nutrition inquiries: 1st round in the first semester and the 2nd round 6 months later. One-kitchen households and poly-kitchen households were to be studied in fixed proportions in the sample. Retrospective questionnaires were completed as for the urban centres.

(vi) Madagascar (rural surveys): For household budget survey in 4 rural zones, 1968-69, the households were visited for 5 consecutive days at each round for 3 rounds at 4-monthly intervals. At each such visit, food consumption should be weighed before cooking and the origin (i.e., whether purchased, own produce, neither purchased nor own produce) of the foods should be registered. For recording information on household budgets, 3 rounds of 24 days each, with household visits every 3rd day, were carried out. Retrospective questionnaires on expenditure (other than food) for the past 12 months, and an inventory of durable goods at several points of the year and questions relating to construction, were also completed.

(vii) Ethiopia: For the rural household consumption and expenditure survey of 1966-68, each selected household was visited daily for 7 consecutive days and on each visit detailed information was collected with reference to consumption, income and expenditure for the previous day. Retrospective information on expenditure on household durables, clothing, rent, and other expenses over the previous 12 months, was also collected during the survey week. For the household economic survey of 1972, which is currently in progress, the recording procedure will consist of both daily visits for 7 consecutive days and a one-time visit to a much larger number of households, with the idea of saving interviewers' time and thereby of including a relatively large number of households in the sample. The method is still at the experimental stage.

(o) Weekly visits:

63. Included under this heading are the Tripoli and Benghazi surveys of Libya, 1969, the national household budget survey of Ghana, 1961-62, and the rural consumption and expenditure survey of Lesotho, 1967-68, amongst others.

- (i) Libya: For the household expenditure surveys in Tripoli and Benghazi, 1969, the reporting period was one month. Different reference periods for different items of expenditure were used. For instance, for perishable food items the reference period was one week; that for other food items and non-food items, one month; the reference period for rent, light, fuel, services and consumption of own production was one month; while the period for clothing, furniture, household durables, capital transactions, etc., was one year. The households were given log books to record all detailed items of expenditure during the reporting month. Each household was visited three times during the survey: the first interview to deposit log books at the beginning of the survey month; the second interview to take place one week after the first, in order to fill forms regarding expenditure items for which the reference period was one week; and the third interview to take place one month after the first one, in order to fill forms regarding other items of expenditure for which the reference period was one month or one year.

- (ii) Ghana: The procedure followed consisted of weekly visits for a period of 3 months in all regions except Brong-Ahafo, where the weekly visits lasted for only 6 weeks. Two separate questionnaires were used in the survey: one for enquiry into household consumption and expenditure and sales of own produce, and the other for household income and farm and business expenses and other payments. Income data were collected from each sampled household immediately on the close of the expenditure survey. Information on income was collected for two periods: (a) for the period of 12 months before the close of the expenditure survey, and (b) for the period of 3 months or alternatively 6 weeks of the household budget survey.

- (iii) Lesotho: The 1967-69 rural household survey of Lesotho used 3 forms. Forms 1 and 2, providing general information on household composition and incomes were intended to facilitate the selection of households. Form 3 required weekly information on consumption, incomes and expenditure for a period of one year. Form 4, which would require daily visits for a period of one month to a sub-sample of households, was not actually used, as the weekly visits were considered to be sufficient for the purposes on hand.

(d) Monthly visits:

64. Prominent under this heading are the 1964-65 national household budget survey of Egypt, the household survey of the six Northern Provinces of Sudan, 1967-68, the survey of urban areas and agricultural estates of Malawi, 1968-69, and the national household budget survey of Tanzania, 1968-69.

(i) Egypt: For the 1964-65 survey, the sample of households selected from urban and rural areas was divided into 4 sub-samples. The survey was accordingly conducted in 4 consecutive rounds at 3-monthly intervals. Each sub-sample was investigated in the corresponding round according to the order of its selection. Altogether three visits to each household were envisaged. At the beginning of the reference month, each sample household was provided with a daily record form and was requested to keep it up to date. At the second visit during the survey month, the interviewer should make sure of the continued cooperation of the household. The third and last visit was made within a week after the survey month. At this visit the questionnaire was filled by the interviewer with the aid of the daily record and necessary discussion with the head of the household.

(ii) Sudan: Two questionnaires were used in the 1967-68 household survey of the 6 Northern Provinces: Questionnaire A, containing general information on household composition and on pattern of consumption, was to be canvassed in a preliminary interview. Wherever the households were in position to maintain records, notebooks were supplied to them for recording the particulars of consumption expenditure; Questionnaire B, used for collection of detailed information on incomes, consumption expenditure, etc., for the month, was to be canvassed in respect of each household for a period of one year at monthly intervals. Therefore, a total of 13 visits to each sampled household was to be made, i.e., a preliminary visit plus 12 monthly visits.

(iii) Malawi: For the 1968-69 survey of urban areas and agricultural estates, the sampled households were interviewed once only. The households were asked to recall food expenditure and consumption and fuel expenditure over the past 7 days and all other expenditures and all income over the past year. The main advantages advanced for this method were the low cost per interview, with a corresponding increase in the sample size and a consequent reduction in the sampling error, and the least respondent resistance that would be entailed by this method.

(iv) Tanzania: The 1968-69 household survey lasted 13 months. Data were recorded by personal interview although notebooks in which to record household's consumption expenditure and incomes, were given to literate households to assist memory. In Dar-es-Salaam, the selected households were interviewed once every ten days for a period of two months and then fresh households would be interviewed. In the rest of mainland Tanzania, the sampled households were interviewed once a month for a period of one year. The questionnaires used for the survey were very similar to those used in the case of the Sudan survey of the six northern provinces carried out in 1967-68.

D. Kind and contents of questionnaires:

65. Under this heading the kinds of questionnaires, schedules or forms used in the countries' household budget surveys will be grouped and their contents examined. This is done in tabular form and given in Table 15 for the more recent surveys of 15 African countries. As examples, the lists of questionnaires or forms used in the household budget surveys of 4 countries of the region, namely, Ethiopia and Tanzania from among the Anglophone countries, and Madagascar and Togo from among the Franco-phone countries, of the region, will be given. In examining the contents of the questionnaires used, recourse will be made to Tables 16a, 16b, 17 and 18. The concepts of income and expenditure used by the countries, where available, will be touched upon. Information on the lengths of recall periods used in 15 countries' household surveys in respect of various types of goods and services, is given in Table 19. The information is of particular relevance when questions of reliability of survey results come up for discussion in the following section of this paper.

(i) Kinds of questionnaires, schedules or forms:

66. The number and kind of questionnaires, schedules and forms used in the household budget surveys of the countries of the region vary greatly from country to country; they also differ in way of presentation and sequence. Nonetheless, it may be said that they consist essentially of the following: (a) general questionnaires such as household composition, housing characteristics, etc.; (b) questionnaires on food consumption, which usually involve daily recording, and sometimes also weighing by balances, for a specified number of days; (c) questionnaires on household budgets, which involve the recording of receipts and expenditures on food and non-food items, also expenditures and receipts of a non-current character, e.g., construction and other capital formation, loans and loan repayments, etc.; (d) retrospective questionnaires for relatively long periods (e.g., monthly, 3-monthly, 12-monthly) on monetary receipts and expenditure, inventory of fixed assets, household durables and foodgrains, etc.; and in several cases, (e) questionnaires on the output, sales and operating costs of household enterprises.

67. As illustrative material, the lists of questionnaires or schedules used in 4 selected countries of the region are given below. As a matter of fact, these lists are rather more comprehensive than the average; they do, however, indicate the field and scope that recently designed questionnaires for use in household surveys intend to cover:

- (a) Ethiopia (1972-73 rural household budget survey): The schedules are understood to be currently tried in the field. One overriding consideration underlying the questionnaire design appears to be the emphasis laid on the operations of household enterprises. The schedules consist of the following:

Table 15. Kinds of questionnaires used or main types of data collected in selected African household budget surveys

Sub-region, country and survey	Household Composition	Housing characteristics	Inventory of household durable and equipment	Inventory of livestock	Financial balance sheet of household	Stock of agricultural products	Structure of expenditure (last 12 months)	Structure of receipts (last 12 months)	Household consumption and expenditure (lengths of recall period in questionnaires)					Household consumption						Household enterprises					Capital transactions (last 12 months)	Household receipts or income	Prices	-
									Daily	Weekly	Monthly	3-monthly	12-monthly	Purchased	Own production	Barter & gift in kind	Purchase and sales of household durables	Production (for output)	Operating expenses	Fixed capital formation	Purchase and sales of fixed assets	Purchase and sales of livestock						
<b>North Africa</b>	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)	(24)	(25)	(26)	(27)	(28)
1. Egypt (1964/65, national survey)																												
2. Libya (Tripoli & Benghazi, 1969)																												
3a. Morocco (1959/60, national)																												
3b. Morocco (1970/71, national)																												
4. Sudan (1967/68)																												
5. Tunisia (1965-66, national)																												
<b>East Africa</b>																												
6. Ghana (1961-62, national survey)																												
7. Nigeria (Urban surveys in 1960's)																												
8. Togo (1964-65, national survey)																												
<b>Central Africa</b>																												
9. Gabon (1962-64 rural survey in 2 regions)																												
<b>East Africa</b>																												
10a. Ethiopia (1967-68, rural survey)																												
10b. Ethiopia (1972-73, rural survey)																												
11. Kenya (1961-64, Central Province Survey)																												
12. Lesotho (1967-69, rural survey)																												
13a. Madagascar (1968-69, Tananarive survey)																												
13b. Madagascar (1968-69, survey of 4 rural zones)																												
14. Malawi (1968-69, urban areas)																												
15. Tanzania (1968-69, national survey)																												

1/ Includes questions on numbers of adults and children, by sex, and number of members who are usually self-employed and total number who are usually gainfully employed. Listing of names is not included.

2/ Financial balance sheets as of beginning and end of the survey month and the beginning and end of the year.

3/ Corresponds to 35 to 45 days.

1. Household particulars and housing;
2. Purchases during the week of food, beverages, tobacco, fuel and light and miscellaneous items (e.g. personal care, household operation, medicines, transport, education, recreation, etc.);
3. Purchases during the week and year of the following:
  - Clothing, footwear, and durable items of personal use;
  - Purchase and sale of household durables (furniture, fixture, earthenware, chinaware, cooking utensils and household appliances, recreational and cultural equipment, personal jewellery, etc.);
  - Receipts of the household (wages, rent, interest, dividend and receipts in kind);
  - Expenditure on gifts and value of gifts received (both in money and kind);
  - Purchase, disposal and loss of livestock;
  - Deposits and withdrawals from funds;
  - Loans given and loan repayments; loans taken and loan repayments received;
4. Consumption of food and drinks on the day prior to the date of the survey (by kind and in quantity);
5. Transactions of the household enterprises during the survey week and year:
  - Material inputs used (purchased, from own production or free collection);
  - Operating costs of the household enterprises (wages, rent, interest, dividends, rates and taxes, etc) by kind of activity of enterprise;
  - Value of output of household enterprise and its disposal during the survey week;
  - Purchases and sales of land and buildings and other fixed assets used in household enterprise;
  - Cost of construction, major repairs and improvements of land and buildings and plant and machinery of household enterprise.

(b, Tanzania (1968-69 national consumption survey): The questionnaires used in the survey are very much the same as those used in the 1967-68 household budget survey in the Six Northern Provinces of Sudan. The questionnaires or schedules consist of the following:

1. Household composition and housing characteristics;
2. Stock in quantity of agricultural products;
3. Stock of household durables and agricultural equipment (number, cost at purchase, present value, number of home-made tools);
4. Production, sales and production costs in kind for agricultural crops in crop detail;

Budget-nutrition questionnaires:

16. Daily recording of foods consumed: product, origin, weight at first weighing, waste, and weight at second weighing; and

Retrospective questionnaires:

17. Monetary receipts and expenditures by items during past 3 months.

(ii) Contents of questionnaires, schedules or forms:

68. The contents of the questionnaires used in the countries' household budget surveys, as expected, also vary from country to country. They may be examined in respect of questionnaires on: (a) household composition, (b) housing characteristics, (c) inventory and stocks, (d) household receipts, (e) household expenditures, and (f) operations of household enterprises.

(1) Household composition:

69. The items of information included in the questionnaire on household composition for 14 African countries' surveys are given in Table 16a. From it, it can be seen that almost invariably a listing of household members, their relationship to head of household, sex and age is involved. Information on occupation, level of education and marital status is frequently collected, followed by questions on kind of economic activity, employment status and ethnic group, while questions on incomes and contribution of member to household expenses were included in several cases only.

(2) Housing characteristics:

70. Relatively fewer countries collected data on housing in their household budget surveys. A synopsis of the items of information included in the questionnaires for all African countries is given in Table 16b. From it, it can be seen that 4 countries, viz., Kenya, Nigeria, Sudan and Tanzania, collected extensive information on housing from their surveys, while the remaining countries were content with a smaller number of questions asked. A primary preoccupation of the designers of these questionnaires appears to lie in the collection of data on gross rent actually paid, or data on which a reasonable imputation of such rent may be based. Thus, questions on number of rooms, type of materials used in construction, tenure, rent, year of construction, cost of building or estimated present value, etc., were usually included in the questionnaire, while questions such as economic activity of owner, annual income of household and sources of financing of the building, were included in a few cases only.

Table 16a. Items of information included in questionnaire on household composition.

Sub-region, Country and Survey	Sex	Age	Level of educa- tion	Liter- acy	Marital status	Principal economic activity	Secondary economic activity	Occupation	Type of tenure Land	House	Rural group	Socio- economic group	Approx- imate income	Monthly contribu- tion to household	No. of income by type	Employment or economic status	Religion		
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)
North Africa:																			
1. Egypt (1964-65, National Survey).....	X		X	X											X				
2. Libya (Tripoli & Benghazi, 1969).....	X	X	X	X	X													X	
3a. Morocco (1969/70, national).....	X	X	X	X	X			X							X				
3b. Morocco (1970/71, national).....	X	X	X	X	X			X											
4. Sudan (1967/68).....	X	X	X	X	X			X											
West Africa:																			
5. Ghana (1961-62, national survey).....	X	X	X	X	X														
6. Nigeria (urban surveys, 1960's).....	X	X	X	X	X			X											
7. Togo (1964-65, national survey).....	X	X	X	X	X			X											
East Africa:																			
8. Ethiopia (1967-68, rural survey).....	X	X	X	X	X														
9. Kenya (1963-64, Central Province survey).....	X	X	X	X	X														
10. Lesotho (1967-69, rural survey).....	X	X	X	X	X														
11. Madagascar (1968-69, Tananarive survey).....	X	X	X	X	X														
12. Madagascar (1968-69, survey in 4 rural zones).....	X	X	X	X	X														
13. Malawi (1968-69, urban areas).....	X	X	X	X	X														
14. Tanzania (1968-69, national survey).....	X	X	X	X	X														

1/ Included in the questionnaire for enumeration of households in the first-stage sample.  
2/ Refers to monthly income.  
3/ Monthly wage of employees.



**Table 16b. Housing characteristics contained in survey questionnaires**

[illegible]

(3) Inventory and stocks:

71. Of the 15 countries' surveys, 8 countries have included questionnaires on stocks. They are: Egypt, Ethiopia, Kenya, Madagascar, Morocco, Sudan, Tanzania and Togo. The coverage of the questionnaires on stocks extends to inventory of household durable goods and equipment, livestock and agricultural products. As can be seen from Cols. (4), (5) and (7) of Table 15, six of the above mentioned 8 countries collected information on inventory of household durables and equipment, five of them on livestock, and 6 of them on stock of agricultural products. In one particular case, namely, that of Madagascar, an inventory was to be made of such a wide range of items as land and buildings, vehicles, tools, furniture, recreational equipment and instruments, household heating and cooking appliances and utensils, livestock, fuel, food and beverages, etc. Few countries have actually tabulated or published the results of the inquiry on inventories; in some cases it is known that the information collected has been considered as defective or incomplete.

(4) Household receipts:

72. A summary of the items of information collected in 14 African countries' household budget surveys conducted in the 60's, is given in Table 17. From it, it can be seen that the receipts cover both current and capital items. Current receipts include items 1 through 4 of Col. (1) of the table, while receipts of a capital nature include items 5 through 9 of Col. (1).

73. From Table 17, it can be seen that most countries which included information on household receipts, have included information on compensations of employees, and elements of entrepreneurial income. Incomes from property (i.e. interest, dividends, land rents) were collected in several countries; questionnaires only, while the item gifts, remittances, dowries, etc. was collected in almost all these countries' questionnaires. Of receipts of a capital nature, most countries collected data on loans taken and loan repayments received, a good number of countries also collected information on proceeds from sales of fixed and other assets (land, building, household durables) and of livestock, and from withdrawals of past savings.

74. Of the countries listed in Table 17, some have included more comprehensive questions on household receipts, in particular, receipts from the enterprising activities of the household. They are: Ethiopia, Ghana, Kenya, Lesotho, Sudan, Tanzania and Togo. For these countries, the operating costs of the household enterprises, e.g. material inputs, labour costs, house rent, etc., and the purchases of goods for resale, have been spelled out.

Table 17. Receipts items distinguished in survey questionnaires or processing forms.

Items of receipts	Morocco <sup>1/</sup> (1970/71 national survey)	Sudan (1967/68 survey)	Ghana (1961-62, national survey)	Nigeria (1960's, urban surveys)	Togo (1964-65 survey)	Gabon (1962-64 survey in 2 rural regions)	Ethiopia (1972-73 rural survey)	Kenya (1961-64 Central Province Survey)	Lesotho (1967-69 rural survey)	Madagascar (1968-69 Tananarive survey)	Madagascar (1968-69, survey in 4 rural zones)	Malawi (1968-69, urban areas)	Tanzania (1968-69, national survey)	Algeria (Algiers survey, 1967-68)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)
1. Compensation of employees:	X	X	X	X	X	X	X		X	X	X	X	X	X
(a) Wages and salaries	X	X		X	X					X		X	X	X
(b) Family allowances, bonus	X			X	X					X			X	
(c) Payments in kind	X	X		X	X									
2. Entrepreneurial income:														
(a) Rent from land & buildings	X		X	X	X		X	X <sup>2/</sup>	X	X	X	X	X	
(b) Sales of farm produce (including fishing & forest products)	X <sup>2/</sup>	X	X	X	X	X	X	X	X	X	X	X	X	
(c) Consumption of own production	X <sup>2/</sup>		X	X	X	X	X	X	X	X	X	X	X	
(d) Sales proceeds from trading	X <sup>2/</sup>		X	X	X	X	X	X <sup>2/</sup>	X <sup>2/</sup>	X	X <sup>2/</sup>	X	X	
(e) Sales proceeds from handicraft products	X <sup>2/</sup>		X	X	X	X	X	X	X		X	X	X	
(f) Earnings of self-employed or of the professions	X		X	X	X		X	X	X	X	X	X	X	X
(g) Purchases of goods for resale			X	X	X		X		X				X	
(h) Operating cost of household enterprises:		X	X	X	X		X	X	X				X	
(i) Material			X	X	X		X	X	X				X	
(ii) Labour			X	X	X		X	X	X				X	
(iii) Rent from land & buildings			X	X	X		X	X	X				X	
(i) Other business income		X	X		X <sup>2/</sup>			X <sup>2/</sup>	X <sup>2/</sup>					
3. Property incomes received (interest, dividends)	X		X	X			X	X						
4. Unrequited current transfers, etc.:														
(i) gifts, remittances, dowries, etc.		X	X	X	X	X	X	X	X		X		X	X
(ii) social assistance benefits, scholarships	X									X				
(iii) Pensions retirement benefits	X			X	X					X		X		X
5. Loans taken and loan repayments	X	X	X	X	X	X	X	X	X	X	X		X	X
6. Sales of fixed assets (land, buildings, equipment)			X				X	X	X	X	X		X	
7. Sales of shares & bonds						X								
8. Sales of livestock					X		X	X		X			X	
9. Withdrawal of past savings		X		X			X	X		X		X	X	

1/ In the questionnaires used by the countries, rents received from land and buildings (including imputed gross rent on owner-occupied dwellings) have often been given as one item, although rent for land should be treated as an income from property, while rent on buildings, as part of the operating surplus of the owner of these buildings.

2/ Refers to income from agricultural holdings.

3/ Refers to income from handicraft activity.

4/ In addition to the items listed in Col. (1), the household income for Morocco includes income from industrial and mining enterprises, and income from transport and services.

5/ Represents receipts from lodgers and food preparations.

6/ Transport and services.

7/ Rents from land and buildings are separately listed in the questionnaire.

8/ Income from non-resident household members.

9/ Refers to income from trading.

(5) Household expenditure:

75. Data on household expenditure for 18 African countries' surveys as shown in Table 18 have been gathered from either the survey questionnaires, or data processing form or related national publications. Items 1 through 9 of Col. (1) represent current expenditure. Items 1 through 8 constitute final consumption expenditure of the household, while item 9, gifts, remittances represents the final consumption expenditure of the recipient of these unrequited current transfers. Items 10 & 11 represent non-current expenditure, while items 12 & 13 are either intermediate consumption (material inputs and house rent) or part of the value added (labour costs) of the household enterprise. In only 4 countries' survey questionnaires were questions on savings asked (i.e. Ethiopia, Kenya, Malawi and Tanzania).

76. From Table 18, it can be seen that the countries have collected most of the items on final consumption expenditure in their survey questionnaires, although in the final analysis of results or publications, the items have often been further condensed or grouped to provide less information on details. As can be seen from the table, information on food, beverages and tobacco, clothing and footwear, gross rent, fuel and power, medical care and health expenses, personal care and effects, has been collected.

77. On housing and transport, however, some of the elements have not always been included in the questionnaires. For instance, although most countries have collected information on household furniture, fixtures and glassware, tableware and household utensils, a number of them have not specifically collected data on household textiles and furnishings and household operation and domestic services.

78. On transport, about half of the countries have not collected information detailed enough to enable a breakdown of the expenses to be made into: (a) personal transport equipment, (b) operation of personal transport equipment, and (c) purchased transport.

79. Similarly, expenditures in restaurants, cafe's and hotels (i.e. meals taken outside home) cannot be traced from most of the questionnaires. This is also the case with expenditures on financial and other services, e.g. service charges for life insurance; actual charges for bank services; charges for money orders and other financial services provided by the post office; administrative charges of private pension schemes, fees for legal services and to tax consultants; membership dues; charges for undertaking and other funeral services, etc.

Table 16. Expenditure Items distinguished in survey questionnaires or processing forms.

[illegible]

Table 10. Expenditure items distinguished in survey questionnaires or processing forms. (Cont'd)

[illegible]

(6) Production and Operating costs of household enterprises

80. As can be seen from Table 17, production of household enterprises can be obtained as follows:

- (i) Agricultural production = sales of farm produce + consumption of own produce:  
Obtainable from 10 countries' questionnaires, namely, Morocco, Sudan, Ghana, Togo, Gabon, Ethiopia, Kenya, Lesotho, Malawi and Tanzania; it being assumed that changes in stocks of farm produce during the year would not be significant and consequently not taken into account.
- (ii) Production from trading activity = Sales proceeds from trading - purchases of goods for resale:  
Obtainable from 4 countries' questionnaires i.e. Ethiopia, Ghana, Lesotho and Togo. In addition, income from trading was given in the survey questionnaires for Morocco, Kenya, Tanzania and Madagascar.
- (iii) Production from handicraft activities:  
Obtainable from 8 countries questionnaires, namely, Morocco, Ghana, Togo, Gabon, Ethiopia, Kenya, Madagascar and Algeria.
- (iv) Earnings of self-employed or of the professions:  
4 countries collected data on this item: Morocco, Ghana, Lesotho and Tanzania. Part of this item can be included under income from handicraft.

81. Although agricultural production (or output) can be derived for 10 countries' questionnaires as listed in (i) above, direct questions on agricultural production were included in the questionnaires for only few countries, namely, Kenya, Sudan and Tanzania.

82. In the case of Kenya, a fortnightly record throughout the survey year, of production and sale of goods and services was kept, separately for production of agricultural products (crops and animal products) in quantity and sales in quantity and value. In addition, incomes from crafts, trading, transport and services were collected on a fortnightly basis. Similarly, data on materials used (in quantity and value) by kind of activity of enterprise, and other expenses (e.g. insurance, licence fees, taxes and rates, income tax, rent, interest on loans, repairs and maintenance of fixed assets, such as land, buildings, vehicles, tools, animals, etc.) and data on employment & wages were also collected on a fortnightly basis. Separate records of harvest and disposal (indicating area and quantity harvested, sales and other disposal) for each agricultural crop were kept for each fortnight of the survey year.

83. In the case of Sudan, monthly data on quantity of each crop harvested, quantity and value of sales, cost of production in cash by crop, cost of production in kind (quantity and estimated value) and quantity destroyed or lost, were collected for each of the 12 months of the survey year. Sales (quantity and value) and cost of production in cash and estimated cost of production in kind, by kind of animal, were completed for each month of the survey year.

84. Similar questionnaires were used in the case of Tanzania for agricultural and animal products, except that only production costs in kind (quantity and value) were to be filled in, while production costs in money by crop or animal detail were omitted. Instead, production costs in money for agriculture were to be recorded in global terms (in quantity and value) for items such as hire of tractors and tools and their repair and maintenance, fertilizers, insecticides, seeding, fodder, vaccination for animals, animals bought for meat production, hired labour, harvested and marketing expenses, etc., for each month of the survey year. Similar expenses for traders or other entrepreneurs were also collected.

85. In addition to Kenya, Sudan and Tanzania, several countries, namely, Ethiopia, Ghana, Lesotho and Madagascar also collected data on operating expenses of household enterprises in their survey questionnaires, as can be seen from Table 17. However, no direct production data were collected in crop detail. Their collection of data on operating expenses of household enterprise is summarised below:

(i) Ethiopia: In the tabulation for the 1967-68 rural household survey, the operating costs for agriculture per household was given under the heads, land tax, rent, consumable items, and wages, while the operating costs per household for livestock were given under feed and veterinary items, for each of the 12 provinces covered in the survey.

The questionnaires for the 1972-73 rural survey include schedules on intermediate consumption, output and disposal of output, and other operating costs (labour, rent, interest, dividends) for the period of one week, by kind of activity of the enterprises.

(ii) Ghana: Information on operating costs of household enterprise was collected once only in respect of the past 3 months and the past 12 months respectively for the following items:

- Purchases of goods for trading
- " " material for handicrafts
- Wages paid to employees
- Interest payments on loans
- Other operating expenses, separately for (i) farming (ii) fishing, (iii) Forestry and (iv) Other business.



(iii) Lesotho: Enterprise operating costs were collected on a weekly basis for the whole survey year. The items distinguished are:

- Farming: Separately for (a) Labour, (b) Seed (own production) and (c) Other
- Trading purchases for resale
- Cost of materials for crafts, etc.

(iv) Madagascar: In the rural survey of Madagascar, questions on operating expenses such as: equipment, seeding, fertilizers, animals, labour, and other expenses were distinguished in the data processing form, although not specified in the questionnaire.

86. As can be seen from the foregoing country description, the cost items distinguished include those of intermediate consumption (e.g. materials, insecticides, fertilizers, seeding, rent for buildings and structures, fees for hire of agricultural machinery and equipment, goods purchased for resale, animals bought for meat production, transport and marketing expenses and parts of value added (e.g. wages, taxes, interest on loans, dividends, etc.). In no case has data on changes in stocks of household enterprise been taken into consideration. Nor has data on depreciation on fixed assets been collected in respect of (i) Owner occupied dwellings, (ii) Other structures and (iii) Other unincorporated enterprise. This is undoubtedly due to the difficulties involved in collecting such information from household enterprises.

#### (7) Capital formation and Saving

87. From Tables 17 & 18, it can be seen that the majority of the countries listed have collected data on loans made and repayments of loans, and on loans taken and repayments of loans received. More than half of the countries recorded data on purchases and sales of fixed assets (land, buildings, machinery and equipment, etc.), few recorded sales of shares and bonds, and 6 countries recorded withdrawals of past savings (namely, Sudan, Nigeria, Ethiopia, Kenya, Madagascar and Tanzania), and one particular country, namely, Libya, included a retrospective questionnaire on capital transactions during the year.

##### (A) Capital formation:

88. Countries that included questionnaires on capital formation include, Ethiopia, Ghana, Kenya, Lesotho, Madagascar, and Tanzania.

(a) Ethiopia: For the 1967-68 rural survey, average cash expenditure per household by province on capital formation was tabulated for the following items:

- Purchase of:
- Tools and implements, broken down into: agriculture, transport, and other.

- Animals; and
- Construction and land improvements.

For the 1972-73 rural survey, purchases and sales of land and buildings and of other fixed assets used in household enterprises and cost of construction during the survey week and year would be collected.

(b) Ghana: Purchases and sales of land and buildings, vehicles, and equipment during the past 3 months and 12 months respectively, were collected in the 1961-62 survey.

(c) Kenya: New acquisitions through constructions or purchase, and sales, of fixed assets separately for land, buildings, animals, vehicles, and tools, furniture and furnishings were collected once a fortnight for the survey year in the 1963-64 Central Province Survey, and were tabulated.

The financing of such capital formation by source, e.g. savings, repayment of loans, advanced, borrowing, dowries, and withdrawal from cash balances or bank deposits, was also tabulated.

(d) Lesotho: Information on payments for purchases of buildings (broken down into labour and materials), farms (fields), animals, vehicles, and other items, were collected weekly for the survey year. In addition, sales of livestock (in number and value)

were collected retrospectively for the year prior to the survey.

(e) Madagascar: For the 1968-69 survey of Tananarive, a questionnaire on construction work undertaken by the household during the past year (indicating number of rooms, type of building materials used for wall, roof and floor, cost, and source of financing,) was included.

For the 1968-69 survey in 4 rural zones, a retrospective questionnaire on construction (broken down into irrigation, plantation improvement, and other, e.g. constructions, land reclamation, fight against soil erosion, etc.), its costs, and mode of payment, was to be filled in periodically during the survey period.

(f) Tanzania: Information on purchases and sales of livestock by species, purchases of plot on own house, costs of building for own house, costs of alterations or extensions to own house and other investment items, was to be collected monthly during the survey year in the 1968-69 survey.

Table 19. Recall periods used in selected household budget surveys in commodity detail. (Cont'd)

Sub-region, country and survey	Recall period: 24-hours	Recall period: Weekly	Recall period: Monthly	Recall period: 3-monthly	Recall period: 12-monthly
<b>Central Africa</b>					
Ghana (1962-64, rural survey in 2 regions) .....	(1) All current consumption expenditure (food consumption, monetary receipts and payments)	(2) All consumption expenditure (foods, clothing, rent, household goods, services (to)), earnings and property income, operating costs, etc. Output of household enterprise, etc.	(3) Production, sales, purchases of the household and household enterprise.	(4) All kinds of monetary receipts and expenditure and consumption of own production.	(5) Monetary receipts, clothing, health and recreational expenses, operating expenses of household enterprises, barter, household equipment & furniture, etc.
<b>East Africa</b>					
Rhodesia (1967-68 rural survey)	Monetary receipts and expenditure; daily cash balance; consumption of food and beverages.	Monetary receipts and expenditure; daily cash balance; consumption of food and beverages.			Household durables; clothing; livestock.
Ethiopia (1972-73 rural survey)		All consumption expenditure (foods, clothing, rent, household goods, services (to)), earnings and property income, operating costs, etc. Output of household enterprise, etc.			Clothing; household durables; income of household; output and operating costs, capital formation of household enterprise; etc.
Kenya (1961-64, Central Province Survey) .....	Food consumption and other expenditure; production, sales and operating costs of household enterprise.	Production, sales, purchases of the household and household enterprise.			
Lesotho (1967-69 rural survey)		All kinds of monetary receipts and expenditure and consumption of own production.	Food		
Madagascar (1968-69 Tananarive survey) .....	Daily monetary receipts and expenditure; food consumption; receipts and payments in kind; consumption of own production.		Structure of household receipts and expenditure.		Construction and building.
Madagascar (1968-69 survey in 4, rural zones) .....	Food consumption expenditure.		Structure of household receipts and expenditure (except food); Construction; non-monetary transactions.		Structure of household monetary receipts and expenditure.
Malawi (1968-69 urban survey)		Food consumption expenditure (purchase, own production, barter); income (earned and unearned).			Clothing; household appliances and furnishings; other non-food expenses; loans, gifts and savings.
Tanzania (1968-69, national survey)			Agricultural production, sales and operating costs; household receipts; consumption expenditure; transfers (loans); savings and withdrawal from savings.		

\* Information given in Col. (2) for Kenya refers to a recall period of a fortnight.

Table 20

Major classifications of the statistics of the distribution of income, consumption and accumulation

1. Compensation of employees
  - i. Wages and salaries
    - (a) In cash
    - (b) In kind
  - ii. Employers' contributions to social security and similar schemes.
  - iii. Employers' contributions to private pension, family allowance, insurance and similar schemes
2. Income of members from producers' co-operatives
  - i. In cash
  - ii. In kind
3. Entrepreneurial income
  - i. Net rents from owner-occupied dwellings
  - ii. New rent from other structures
  - iii. Net proceeds from other unincorporated enterprises
  - iv. Withdrawals from quasi-corporate enterprises:
    - (a) In cash
    - (b) In kind
4. Primary income (1+2+3)
5. Property incomes received:
  - i. Interest
  - ii. Dividends
  - iii. Land rents, royalties, etc.
6. Distributed factor income (4+5)
7. Casualty insurance benefits
8. Unrequited current transfers received
  - i. Social security benefits
  - ii. Social assistance grants
  - iii. Unfunded employee welfare benefits
  - iv. Other current transfers
9. Private pension fund benefits

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10. Benefits from annuity policies of life insurance companies
11. Less: Casualty insurance premiums
12. Less: Unrequited current transfers paid
  - i. Direct taxes
  - ii. Social security contributions
  - iii. Fees, fines and penalties
  - iv. Current transfers to private non-profit institutions
  - v. Other current transfers
13. Less: Net private pension fund contributions
14. Less: Net premiums in respect of annuity policies of life insurance companies
15. Available income (6 through 10 - 11 through 14)
16. Final consumption expenditure
17. Saving (15 - 16)
18. Consumption of fixed capital
  - i. Owner-occupied dwellings
  - ii. Other structures
  - iii. Other unincorporated enterprises
19. Capital transfers received, net
20. Less: Gross capital formation:
  - i. Owner-occupied dwellings
  - ii. Other structures
  - iii. Other unincorporated enterprises
21. Net lending (17+18+19-20)
22. Net acquisition of financial assets
 

Of which:

  - i. Deposits
  - ii. Bill and bonds
  - iii. Corporate equity securities
  - iv. Net equity on life insurance reserves
  - v. Net equity on private pension funds
  - vi. Proprietors' net additions to accumulation to quasi-corporate enterprises
  - vii. Trade credits and advances
  - viii. Other financial assets

attached for information

23. Net incurrence of liabilities, hereinafter referred to as "liabilities," shall be defined as the net amount of liabilities incurred by the Group during the period, including the following:

- (a) Loans, including mortgages
- (b) Consumer debt
- (c) Owner-occupied dwelling debt
- (d) Other unincorporated enterprise debt

ii. Trade credit and advances

(a) Consumer debt

(b) Unincorporated enterprise debt

[illegible]

surveys of cottage or small-scale industries in the region can be obtained from industrial department. Presumably the region on obtaining information on this item. Presumably in kind: little experience is available in conducting it. Income of members first producers' cooperatives in zone and item 2.

Most elements of entrepreneurship have been gathered in selected households through surveys in Africa (see above II). These include: (i) products from agricultural activities - sales of agricultural produce + contribution of one production intermediate consumption; (ii) product from handicrafts (sales less materials); (iii) product from trading (sales proceeds less purchases of goods for resale); (iv) income from self-employment and professions; these include earnings from other household entrepreneurial activities not covered, e.g., transport, mining, gainful, casual, etc.; (v) gross profit for house. However, it is difficult to obtain reliable figures from owner-occupied dwellings, because they are obtained from current survey questionnaires used in countries of the region. Item 3(iv) on withdrawal from inter-occupational enterprises in cash and in kind, would have to be obtained from statistical authorities or similar sources as obtained from households engaged in trade.

Item 5. Property income received and paid: Information on interest dividends, and rents (referring to both land and buildings combined) has been collected in a large number of household budget surveys in the region. Tabulations of this have, however, been rather scanty.

by such variables as socio-economic groups of heads of households, fractile groups of households ordered according to distributed factor income and/or available income, age and sex, occupation, educational attainment of earners, size of household, etc., have not been taken into account. When these cross-classifications mentioned above are taken into account, the data requirements from household budget surveys would undoubtedly be greatly increased.

92. The availability of data in respect of items included in Table 20, from African household budget surveys, is discussed below:

- Item 1. Item 1(i), wages and salaries in cash and in kind, can usually be obtained from household budget surveys, while Items 1(ii) & (iii), concerning employers' contributions to social security, to private pension, family allowance, insurance and similar schemes, would have to be obtained from the employers, i.e. surveys of enterprises.
- Item 2. Incomes of members from producers' cooperatives in cash and in kind: little experience is available in countries of the region on obtaining information on this item. Presumably this item can be obtained from household budget surveys, or surveys of cottage or small-scale industries.
- Item 3. Most elements of entrepreneurial income have been gathered in selected household budget surveys in Africa. (See Table 17). These include: (i) product from agricultural holdings (= sales of agricultural produce + consumption of own production - intermediate consumption); (ii) product from handicrafts (sales less materials); (iii) product from trading (sales proceeds less purchases of goods for resale); (iv) income from self-employment and professions: these include income from other household enterprising activities not covered, e.g. transport, mining, restaurants, cafes, etc., and (v) gross rent for houses. However, Items 3(i) on net rents from owner-occupied dwellings, cannot yet be obtained from current survey questionnaires used in countries of the region. Item 3(iv) on withdrawals from quasi-corporate enterprises in cash and in kind, would have to be obtained from statistics on enterprises, and most likely cannot be obtained from household budget surveys in current African conditions.
- Item 5. Property incomes received and paid: Information on interest, dividends, and rents (referring to both land and buildings combined) has been collected in a large number of household budget surveys in the region. Tabulations of data have, however, been rather scanty.

- Items 7 & 11. Data on casualty insurance, benefits and casualty insurance premiums have not been specifically collected in most African household budget surveys. These items will be important for urban households, and are probably not significant for rural households.
- Items 8 & 12. Unrequited current transfers received and paid, with breakdown as shown in Table 20, can be obtained approximately from the better designed questionnaires used in selected countries of the region.
- Items 9 & 13. Private pension fund benefits and contributions: As shown in Table 17, pensions and retirement benefits have been included in 6 African countries' survey questionnaires. Data on private pension fund contributions can certainly also be collected.
- Items 10 & 14. Benefits from, and net premiums in respect of, annuity policies of life insurance companies: These items have not been specifically included in the survey questionnaires for most countries of the region, but can be so included, or more conveniently obtained from life insurance companies operating in the country.
- Item 18. Information on consumption of fixed capital, broken down into owner-occupied dwellings, other structures, and other unincorporated enterprises, has not been collected so far in the household budget surveys conducted in countries of the region. Nor is it expected that such information will be collected.
- Item 19. Information on capital transfers received by households has generally not been included in the countries' survey questionnaires. This is due to the practical difficulty in distinguishing current from capital transfers. Statistics on capital transfers to households from general government and corporate and quasi-corporate enterprises would help.
- Item 22 & 23. Net acquisition of financial assets and net incurrence of liabilities: Information with breakdown as shown under these items in Table 20, in most cases cannot be obtained from the surveys questionnaires currently in use.



93. It is now time to see whether the concepts of the major aggregates of the system, such as primary income, distributed factor income, available income, final consumption expenditure, saving, net lending, etc., can be approximated from data already collected in some of the more elaborate questionnaires of African household budget surveys. For this purpose, the surveys of Ghana, Kenya, Lesotho, and Madagascar will be chosen for purposes of illustration.

(i) Ghana:

<u>Receipts</u>	<u>Expenditure</u>
-----------------	--------------------

95. In the case of Ghana, the following approximations can be made:

Property income received = 1.9

8.2.1. Distributed factor income = Compensation of employees + 1.921 net income = 1.921 net income

Available income = Distributed factor income + 1.1492021111

(ii) Kenya: SLA - SLB - SLB = participant litigation award

96. The 1963-64 Central Province Survey published the following items of receipts and expenditures:

	Receipts	Expenditures
Salaries	\$100,000	\$100,000
Grants	\$50,000	\$50,000
Other income	\$20,000	\$20,000
Total	\$170,000	\$170,000

## Receipts

Expenditure (iii)

- | 1.1 Agriculture   |      | 2.1 Final consumption expenditure         |      |
|---|------|---|------|
| (i) Sale of crops                                       | 1.1  | (cash)                                    | 2.1  |
| (ii) Sale of livestock products                         | 1.2  | Consumption of own production             | 2.2  |
| (iii) Sale of livestock (beef cattle)                   | 1.3  | Dowries, gifts and remittances            | 2.3  |
| 1.2 Manufacturing and crafts                            | 1.4  | Taxes                                     | 2.4  |
| 1.3 Trade (net)   | 1.5  | Materials used in enterprise:             | 2.5  |
| 1.4 Transport   | 1.6  | (i) Agriculture                           | 2.5  |
| 1.5 Services  | 1.7  | (ii) Other industries                     | 2.6  |
| 1.6 Ownership of dwellings (rent of buildings)          | 1.8  | Wages of hired labour                     | 2.7  |
| 1.7 Wages and salaries                                  | 1.9  | Rent paid                                 | 2.8  |
| 1.8 Dividends and interest                              | 1.10 | Interest payments                         | 2.9  |
| 1.9 Rent from land                                      | 1.11 | Vehicle maintenance and repair            | 2.10 |
| 1.10 Remittances for relatives                          | 1.12 | licence fees and rates                    | 2.11 |
| 1.11 Other receipts including charity                   | 1.13 | Miscellaneous-stationery, insurance, etc. | 2.12 |
| 1.12 Withdrawals from savings                           | 1.14 | Purchases of assets:                      | 2.13 |
| 1.13 Repayment of loans advanced                        | 1.15 | (i) Land                                  | 2.13 |
| 1.14 Loans taken  | 1.16 | (ii) Buildings                            | 2.14 |
| 1.15 Dowries  | 1.17 | (iii) Vehicles                            | 2.15 |
| 1.16 Sales of livestock (dairy cattle)                  | 1.18 | (iv) Tools                                | 2.16 |
| 1.17 Assets sold  | 1.19 | (v) Livestock (dairy cattle)              | 2.17 |
| 1.18 Imputed value of own consumption of own production | 1.20 | Repayment of loans                        | 2.18 |
|   |      | Loans made                                | 2.19 |

97. In the case of Kenya, the following approximations to aggregates of the complementary system can be made:

Compensation of employees=11,711,225,000

Entrepreneurial income = 1.1 through 1.6 + 1.18 to 1.54

11.1 through 12.11 - 1964

Property income received \$1.8 + 1.9 million for each

Distributed factor income = Compensation of employees + 1984

entrepreneurial income + 11.8 + 11.9 percent. The volatility goes down

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$$11.1 - 11.1 - 7.2 \times 8.8 = \text{gasket loss}$$

Unrequited, current transfers received, net =  $47.10 + 1.11 + 1.15 - 2.3$   
 Available income = Distributed factor income + Unrequited current  
 transfers received, net.

Final consumption expenditure=62:10+12:2 = 80000 e. (b)iev)

$$\text{Saving} = \text{Available income} - \text{final Consumption expenditure}$$

Gross capital formation =  $2.12 - 1.16 = 1.17$  billion (it)

Net acquisition of financial assets = 2.14 - 1.12 - 1.13

Net incurrence of liabilities = 31.44 - 2.13 = 29.31

$$\text{Net lending} = 2.14 - 1.12 - 1.13 - 1.14 + 2.13 = 0.88$$

(iii) Lesotho: 2000

98. The following items of receipts and expenditure were collected weekly for one year in the 1967-69 rural survey of Lesotho:

## Receipts

## Expenditure

- 1.1 Sales of agricultural (including livestock) produce
- 1.2 Domestic consumption of own produce
- 1.3 Seed replanted
- 1.4 Trading resales (excluding own production)
- 1.5 Work on own account (crafts, etc.)
- 1.6 Rent from property owned
- 1.7 Wage income
- 1.8 Income from non-resident household members:
  - (a) Cash
  - (b) kind
- 1.9 Sales of property
- 1.10 New loans received
- 1.11 Repayment of loans given
- 1.12 Other remittances received

- 2.1 Farming: Labour:  
Seed (own production)  
Other
- 2.2 Trading purchases for resale
- 2.3 Cost of materials for crafts,  
etc. (available for sale)
- 2.4 Final consumption expenditure  
(cash)
- 2.5 Domestic consumption of own  
produce
- 2.6 Payments on property purchased:  
(a) Buildings : Labour  
Materials  
(b) Farms (fields)  
(c) Animals  
(d) Vehicles  
(e) Other
- 2.7 Loan repayments made
- 2.8 Loans given
- 2.9 Other payments

99. In the case of Lesotho, the following approximations can be made:

Compensation of employees = 1.7

Entrepreneurial income is = 1.1 through 1.5 and 1.8 said old 1 1.8  
- 2.1 through 2.3 says you a change of

Property income received = 1.6

Unrequited current transfers received = 31.129 12 notional gross

Distributed factor income =  $1.7 + 1.6$  + entrepreneurial income

$$\text{Available income} = \text{Distributed factor income} + 1.12$$

Gross capital formation = 2.6 = 1.9

Final consumption expenditure =  $0.4 + 0.51$  of  $Y$  and  $0.09$  of  $Y$

Net acquisition of financial assets = 2.81 = 16.1% of net income

Net incurrence of liabilities = 1.10 - 2.7

$$\text{Net lending} = 2.8 + 2.7 - 1.10 - 1.11.$$

(iv) Madagascar:

100. From the data processing forms for the 1968-69 survey in 4 rural Zones of Madagascar, the following receipts and expenditure items can be identified:

<u>Receipts</u>	<u>Expenditure</u>
1.1 Agricultural crops	2.1 Final consumption expenditure
1.2 Fishing	2.2 Operating expenses:
1.3 Livestock	(a) Equipment
1.4 Handicraft	(b) Seeds
1.5 Trading	(c) Fertilizers
1.6 Wages and salaries	(d) Animals
1.7 Pensions, retirement benefits	(e) Labour
1.8 Rent	(f) Other
1.9 Gifts, remittances received	2.3 Taxes and rates
1.10 Loans taken	2.4 Contributions
1.11 Repayment of loans	2.5 Gifts, lottery
1.12 Exceptional sales (i.e. Sales of land, buildings, etc.)	2.6 Feasts and ceremonies
1.13 Other receipts	2.7 Purchases for resale
	2.8 Loans made:
	(a) to individuals
	(b) to institutions
	2.9 Repayment of loans

101. In the case of Madagascar, the following approximations can be made:

Compensation of employees	= 1.6
Entrepreneurial income	= 1.1 through 1.5 - 2.2
Property income received	= 1.8 through 2.4 - 2.7
Unrequited current transfers received, net	= 1.7 + 1.9 - 2.5
Distributed factor income	= 1.6 + 1.8 + entrepreneurial income
Available income	= Distributed factor income
Final consumption expenditure	= 2.1 + 2.6
Saving = Available income	= 2.1 - 2.6
Net acquisition of financial assets	= 2.8 - 1.1
Net incurrence of liabilities	= 1.10 - 2.9
Net lending	= 2.8 + 2.9 - 1.10 - 1.11

102. From the above approximations, it is clear that the data that have been collected through the survey questionnaires in the 60's, are necessarily crude and deficient. A good deal of refinement to the existing questionnaires would have to be accomplished if better approximations to the concepts of the major aggregates on income, consumption and accumulation were to be obtained. This would require the inclusion in the survey questionnaires additional items of information.

concerning compensation of employees, entrepreneurial income, property income, and items on unrequited current transfers, as listed in Table 20, so far as incomes are concerned. Additional information on saving, consumption of fixed capital, and capital transfers would also be needed, if meaningful data on net lending were to be arrived at. As mentioned earlier in the paper, data on the net acquisition of financial assets and on the incurrence of liabilities, with breakdown as shown under items 22 and 23 in Table 20 could be more profitably obtained through specially conducted surveys for the purpose.

103. It remains to be said that information on the socio-economic group of head of household, in accordance with the classification proposed in document E/CN.3/425, would need to be collected in future survey questionnaires in order to render possible the task of cross-classifying income, consumption and accumulation of households by socio-economic group of heads of households, as required in the complementary system.

#### E. Assessment of reliability:

##### (i) Countries' own assessments:

104. Although assessments of accuracy and reliability of survey results are of paramount importance to the perspective users of these statistics, up to now few of the released reports on household budget surveys conducted in countries of the region contain such an assessment. Sometimes calculations of sampling errors for selected aggregates were made, but had not been published.

105. Thus, of the 18 African countries' household budget surveys under case study, 4 countries made qualitative statements on this problem, namely, Ethiopia, Kenya, Nigeria and Sierra Leone, and 2 more countries, namely, Malawi and Sudan, specifically calculated sampling errors and published the results.<sup>1</sup> A summary of the country statements on this subject is given below:

(a) Ethiopia: For the 1967-68 rural survey, it was stated that for the 24-hour recall the errors involved in memory of the respondent was "probably very small if not negligible." For items of expenditure requiring 12-months recall, serious error is not "likely to have occurred," because the farmers' memories "are strongly linked to the annual crop cycle".<sup>2</sup> Calculations of sampling errors were not made.

(b) Nigeria: For the annual Rural Economic Survey (rural household consumption), some cross-checking has been made to assess the plausibility of data collected. Thus, the quantities of foods reported as consumed were converted into their dietary calories for comparing with standard diet requirements. This was done separately for each sample village unit studied.

<sup>1</sup>/This refers to the information available at the time of writing this paper only.

<sup>2</sup>/Rural Household Expenditure and Consumption Survey (Dec. 1966-June 1968), Central Statistical Office, Addis Ababa, Jan. 1971

- (c) Kenya: For the 1963-64 Central Province Survey, rough calculations made indicate the sampling errors (coefficient of variation) in respect of major items such as total receipts to be around 10 per cent.<sup>1/</sup> Allowance has to be made for unknown margin of error introduced by the rejection of 180 households out of the originally selected 1,080 households. Calculations also showed that for all the districts together, the daily records yielded estimates of food expenditure approximately 10 per cent higher as compared to the fortnightly records. Non-sampling errors for this survey mainly arose from the inexperience or lack of understanding on the part of the field enumerators and inefficient supervision and scrutiny of schedules in the field. The lack of keeping of any accounts by households and their suspicion in respect of certain items on the schedule such as area owned and operated (in the context of land consolidation and registration reforms), were also cited as possible sources of non-sampling errors.
- (d) Sierra Leone: Sampling errors were calculated for the urban household budget survey conducted in the Northern, Southern, Eastern and Western Provinces, 1967-69. It was estimated in the survey reports that the margins of error involved might not be in excess of plus or minus 5% in respect of average total income and expenditures of the household, on the basis of similar surveys elsewhere.<sup>2/</sup>
- (e) Malawi: For the urban surveys of Malawi, 1968-69,<sup>3/</sup> non-sampling errors were considered to have possibly arisen from any of the following sources:
- (i) inaccuracies of previous surveys on which the sample frame (or weights) have been based;
  - (ii) inaccuracy of information provided by respondents;
  - (iii) errors by the interviewer in recording information;
  - (iv) errors in coding and punching;
  - (v) errors due to the data processor or card sorter misreading information on the card or cards being omitted; or
  - (vi) errors in printing and publishing the data.

- 1/ Economic Survey of Central Province, 1963-64, Statistics Division, Ministry of Economic Planning and Development, 1968.
- 2/ Household Survey of the Northern Province (Urban Areas): March 1968-Dec. 1969: Final Report: Household Expenditure and Income and Economic Characteristics, Central Statistical Office, Freetown, Jan. 1971.
- 3/ Household Income and Expenditure Survey for Urban Areas and Agricultural Estates, 1968, National Statistical Office, Zomba, May 1970.

It was stated that, although little could be done about (i) and (ii), the other sources of non-sampling error were thought to have been reduced to a minimum by constant checking and supervision.

As for sampling errors, use was made of a sub-sample of 10 clusters (instead of using all the 50 clusters included in the sample) for the calculation of coefficients of variation with respect of various expenditure items and by area. For illustration, these coefficients are given in Table 21. It can be seen from the table that for the urban areas as a whole, these coefficients for expenditure items vary from 5 to 12 per cent.

The main objection to the method of collecting data in this survey is that it puts a great strain on the respondents' memories, as only one main visit to households was made and the recall period for all non-food consumption expenditure and income was for 12 months. It might be argued that respondents tended to omit expenditure on small items purchased within the reference period and to include expenditure on large items which actually occurred outside the reference period. To counter this criticism, it was argued that this point would be less valid in the case of the Malawi survey, as the incomes of the households were low and the number of purchases made was correspondingly small.

- (f) Sudan: Non-sampling errors involved in the 1968-69 survey in the 6 Northern Provinces were not discussed in the survey report. However, sampling errors (coefficients of variation) were calculated for the main items of consumption expenditures separately for the urban, semi-urban and rural areas and for the country as a whole. These coefficients are given in Table 22 as an example of such exercise. It can be seen from Table 22 that the coefficient of variation in respect of total expenditure was only a little over 2 per cent for all areas; corresponding estimates for the urban, semi-urban and rural areas were 0.98, 4.82, and 3.23 per cent respectively. The relatively higher degree of accuracy of the estimates for the urban areas was attributed to the fact that a relatively larger sample was allocated to the urban areas.

(ii) Effects of length of recall periods on data reliability:

106. One main source of non-sampling errors in consumer expenditures surveys has been those due to faulty memory. Two types of errors have been of particular concern, namely, omissions of expenditures due to forgetting of items (recall losses), and erroneous reports of timing of expenditures levels reported when the recall period was short than when it was long, particularly for types of expenditures made only intermittently.

Table 21

Household income and expenditure survey for urban areas,  
Malawi, 1968-1969 coefficient of variation (per cent)

Item	Blantyre	Zomba	Lilongwe	Mzuzu	S.U.As.	Agricultural Estates	Total
Cash Disbursements	7	9	11	5	3	5	6
Cash Expenditure	7	9	11	5	3	5	6
Cash Receipts	7	11	12	6	3	5	6
Disposable Cash	7	9	12	5	3	5	5
Income	7	9	12	5	3	5	5
Food Expenses	6	7	10	6	2	3	6
Household & other expenses	8	9	14	7	5	5	7
Subsistence Food	6	7	13	19	8	6	12
Population	2	7	15	5	2	5	4



Table 22

Household Sample Survey for Sudan, 1967-68  
Coefficient of Variation (percent)

Item	Urban Areas	Semi-Urban Areas	Rural Areas	All Areas
<b>FOOD AND DRINKS</b>				
Cereals	2.60	5.23	3.32	2.73
Cereal products	1.63	9.01	4.65	2.38
Starches and roots	1.18	16.11	4.64	3.66
Pulses	1.39	17.63	5.54	3.79
Vegetables	1.84	8.61	2.93	2.17
Fruits	5.40	14.53	4.42	3.45
Meat	0.91	5.17	2.29	1.55
Milk	1.03	8.84	2.99	2.40
Oils and fats	0.95	6.76	5.19	4.08
Sugar and sweets	0.82	5.13	3.03	2.22
Raw material for drinks	2.91	4.73	3.98	3.08
Non-alcoholic drink	2.55	27.15	5.38	2.95
Alcoholic drink	7.40	19.20	7.75	6.51
Tobacco	2.61	13.98	6.26	3.70
Food and drink outside	2.44	18.15	9.37	3.99
<b>TOTAL FOOD AND DRINK</b>	<b>0.75</b>	<b>4.25</b>	<b>2.80</b>	<b>1.96</b>
<b>HOUSING</b>				
Rent and water cost	3.13	8.96	26.46	10.25
Repairs and maintenance	12.01	14.96	7.15	15.00
Fuel and power	2.44	8.28	3.01	2.14
<b>TOTAL HOUSING</b>	<b>2.10</b>	<b>6.31</b>	<b>9.04</b>	<b>4.44</b>
<b>CLOTHING &amp; FOOT WEAR</b>				
Clothing & foot wear for men and boys	2.01	6.52	5.20	3.79
Clothing & foot wear for women & girls	2.29	8.33	4.72	3.53
Clothing & foot wear for children	2.91	11.82	4.72	3.55
<b>TOTAL CLOTHING &amp; FOOT WEAR</b>	<b>1.71</b>	<b>7.30</b>	<b>4.45</b>	<b>3.27</b>

Table 22 (Cont'd)

Household Sample Survey for Sudan, 1967-68

Coefficient of Variation

Item	Urban Areas	Semi Urban Areas	Rural Areas	All Areas
MISCELLANEOUS				
Furniture	8.85	16.05	9.24	5.97
Linen	4.39	14.40	6.51	4.49
Personal care and health	4.45	10.38	7.46	4.52
Transport and communication	3.30	19.35	14.72	6.54
Education and entertainment	2.50	18.41	10.96	4.45
Ceremonials	4.35	11.75	8.30	5.80
TOTAL MISCELLANEOUS	2.09	9.79	5.03	2.98
ALL ITEMS	0.98	4.82	3.23	2.16

However, none of the studies provided direct measures of recall losses, since any reporting errors in timing of expenditures were also reflected in the comparisons.<sup>1</sup> It was also found that telescoping, that is, the tendency by respondents to report expenditures either for an earlier or later time period than when the expenditures actually occurred, played a part in raising the expenditure levels when the recall period used was short.

107. In the case of most countries of the region, the pertinent question to be asked is: what the recall losses are and what the ideal lengths of recall period would be for different categories of consumer expenditures. In other words, would the data collected on a weekly or longer interval basis be of equal accuracy and reliability as those collected through daily visits in current African conditions? If this was the case, it would mean that the same number of households could be interviewed at much reduced costs, or that the sample size originally envisaged could be considerably increased, with a consequent reduction in sampling errors, at the same cost.

108. Unfortunately, no rough and ready answer to the question posed above appears to exist. As reported in a recent issue of the Statistical Newsletter of ECA,<sup>2</sup> published accounts of experiments on recall errors in household budget surveys in developing countries, are scarce. Altogether 5 such experimental studies were mentioned and a summary of the results is given below:

- (a) India: In one of these studies (Mahalanobis and Sen., 1954), expenditure on various items was compared for weekly and monthly recall. Monthly recall gave consistently lower results, the difference varying considerably between items of expenditure, from rice (6%) to sugar (30%), and tending to be greater for items purchased less frequently;
- (b) Ghana, 1955-57: Two rural surveys carried out in Ghana in 1955-57 (Central Bureau of Statistics, Ghana, 1961), in which weekly budget records were kept for all sample households and daily records for a sub-sample (rotated each month). The weekly record fell below the daily by 17 per cent in one survey and 22 per cent in the other. There was some indication that the discrepancy was mainly due to irregularly purchased items such as clothing, durables, drink and tobacco.

- 1/ Response errors in collection of expenditures data by household interviews: An experimental study, U.S. Department of Commerce, Bureau of the Census, Technical Paper No. 11.
- 2/ ECA Statistical Newsletter, No. 40, March 1972, which contains 3 articles on experiments on recall errors in household expenditure data.

1966: The survey was conducted by an essentially marginal university department and without any full-time senior officer in charge. The sample covered 6 urban and 8 rural census enumeration areas in the Eastern Region. The recall periods tested were 1 day, 2 days, 3 days and 7 days. Each length of interval was applied to each household twice. The urban data were analysed for amounts spent and frequency of purchase; the rural data were analysed only for amounts spent.

When the data obtained for the urban areas for the 4th quarter of 1966 was converted to an expenditure per household per day basis, it was found that the 7-day figures under-reported the 1-day figures by 27% for local food, and 54% for total expenditure (excluding rent). The conclusion to be drawn from the results is that there is firm evidence of recall error and the magnitude of the error is very large. There is a fairly systematic trend of decreasing amounts of expenditure with the gradual lengthening of recall periods from 1 day to 2, 3 and 7 days.

(d) Botswana: A similar survey was carried out in Botswana. The sample covered the large rural town of Serowe. The survey was carried out as a social science project by secondary schoolboys. The intervals tested were 1 day, 3 days, and 7 days. Each length of interval was applied 30 times. The analysis was confined to total expenditure, without breakdown by categories of expenditure. The sample analysed consisted of 96 households. In this case, it was found that for total reported expenditure the 7-day figure under-reported the 1-day figure by 44%, and the 3-day figure under-reported the 1-day figure by 37%. These differences have been found to be significant at the 1% level of significance. In other words, these differences cannot be ascribed as due to chance fluctuations in sampling and are expected to occur in less than one out of every 100 cases.

(e) Malawi 1970: Two district experiments were carried out in Zomba and Zomba June-September, 1970, among all private African households, with the object of examining error in the reporting of food and clothing expenditures as a function of recall period. This was considered important as the Household Income and Expenditure Survey of Urban Areas of 1968-69 in Malawi used a recall period of 7 days for food and fuel and 12 months for all other expenditure. The first experiment was held throughout June and July 1970, with a sample size of 150 households and the second experiment in August and September, 1970, with a sample of 48 households. The two samples were randomly selected, and non-response was not a problem. The main conclusion of these experiments is that: (i) There is strong evidence to suggest that expenditure on food is exaggerated when a recall period of

### Household transactions

127. In surveys intended to obtain details of household transactions, it is usually convenient to consider the following groups of items:

Receipts: Farming receipts  
Sales  
Consumption of own produce  
Seed replanted  
Non-farming receipts  
Other receipts

Payments: Enterprise operating costs  
Household consumption expenditure: Food and drink  
Housing  
Clothing  
Other

Consumption of own produce

Payments on property purchased

Other payments.

128. The arrangement is of course an over-simplification. For example, a breakdown of farming and non-farming receipts is needed even in a summary account, and sales of farm produce have to be distinguished from re-sales to avoid double counting in the overall analysis.

129. The three items shown under farming receipts constitute agricultural production without allowance for changes in stocks. They can be supported by a separate production record if necessary. Similarly, domestic consumption of own produce plus domestic expenditure are total household consumption, again not taking account of changes in stocks. The miscellaneous receipts and payments items include loan transactions, remittances, etc. which are often of considerable importance. The account for urban households is similar except for the absence of farming transactions.

130. Perhaps the main point of interest with respect to survey design is that the receipts items, particularly those dealing with household production, are the ones for which variation between households is greatest, whereas household consumption tends to be more stable. A sample of a given size will therefore provide a more accurate measure of consumption than production. But consumption involves more transactions than production, and its recording calls for more frequent enumerator visits.

131. The general implication is that production records require a reasonably large sample of households to which about four visits a month might be sufficient, while consumption - particularly the household consumption expenditure component - can be dealt with through a sub-sample,

but daily visits are normally required. To establish a link between the two sets of records, however, and to provide for internal consistency checks, the production records for the whole household sample must be accompanied by data under broad headings for all the items listed above. These remarks are again an over-simplification for the sake of brevity and are intended only to draw attention to the difference between production and consumption recording.

132. A one-month recording period for individual households has been the most usual in the past and is probably the most satisfactory.

133. Recent research has thrown some light on the question of whether households should be re-investigated at various times during the year, or whether the sample should be replaced for each recording period. The results so far obtained indicate a low correlation between the transactions of given households at different times. This implies that there is no great advantage to be derived from repeated records for the same households, since seasonal changes can be estimated equally well when households are replaced.

134. A number of advantages can be claimed for using the same sample on successive occasions. Among them, may be listed: (i) better estimates of seasonal variation, (ii) better estimate of spread of incomes, (iii) better estimates of annual totals for individual households and (iv) better results from retrospective questionnaires. On balance, however, replacement would seem the better arrangement. It avoids any displeasure that might be caused through disturbing households over extended periods and it does ensure that the effective total sample size is maximised in cases where, contrary to the situation described in the last paragraph, there is a high time correlation.

135. There are of course disadvantages in replacing households. The most important of these is the difficulty in classifying them by levels of income which, as noted above, has to be overcome through the collection of supplementary information. Another problem is that of drawing replacement samples from enumeration data which become steadily more out-of-date with the passage of time. In addition, it may be necessary to re-deploy enumerators as a result of changes in the geographical distribution of sample households between recording periods. However, most of these are practical problems which can be solved through suitable field arrangements.

#### Field organisation

136. Most countries have to begin their statistical field work with surveys organised on an ad hoc basis, which usually implies either that enumerators have to be highly mobile or that their employment is of a short term nature. All the arrangements suggested in this paper call for experienced enumerators. It is therefore desirable that a permanent field organisation should be established as early as possible under the supervision of regional branches of the national statistical office. This then provides a continuing means of conducting not only household economic surveys, but many other kinds of statistical investigation on a countrywide basis.

137. It should be remembered that an effective field organisation can be developed only on the basis of practical experience. Countries with limited resources should therefore not hesitate in establishing a small team of well trained enumerators. Such a team can produce useful although limited results and it provides a nucleus which can be expanded rapidly when conditions permit.

#### Processing and analysis

138. The remarks in this paper suggest that most household surveys should be spread over periods of up to one year so as to take account of seasonal variations. The arrangement also enables fairly large inquiries to be undertaken by a limited field force and helps in avoiding fluctuations in the number of enumerators employed. Under these circumstances it is necessary to deal with the bulk of the data processing while field work is in progress, so that results can be published soon enough to be useful without causing undue pressure on processing capacity. As pointed out earlier, a further important reason for summarising results immediately after each monthly recording period is to bring to light any deficiencies in the recording arrangements so that they can be rectified before they have had any serious effect on the quality of the results.

139. It is not the purpose of this paper to discuss processing methods, but it should be noted that when a basis for classifying records according to household income levels is available from the preliminary enumeration - or from supplementary data collected during the budget recording periods - almost the entire analysis of surveys spread over fairly long periods can be completed while the field work is still going on. In cases where households are re-investigated at various times during the year, it is necessary to prepare tables showing income class classifications of results after field work has been completed.

140. It should not be assumed that a computer is necessary for the analysis of household budget material. When processing is spread over a long period as suggested above, manual arrangements may be simpler and more effective. The position has to be considered in terms of the tabulations required, availability of computer time and the time and staff needed for coding, punching and verifying. The point to be remembered is that any deviation from a precise processing timetable can easily jeopardise a whole survey.

#### Consumption and nutrition

141. The consumption records referred to earlier in this paper, i.e. household consumption of own produce and household expenditure, do not constitute the direct measure of goods used which characterises a household consumption survey. Such records, together with data on nutrition, are of a more specialised nature and require very frequent enumerator visits. They are not of particular interest for general economic analysis, but if necessary they can be obtained for a sub-sample of the households investigated in the broader type of inquiry discussed above.

Prospects and initiative

142. Although there are no new methods which can significantly reduce the cost of household economic surveys, it is fairly clear that these inquiries need not be unduly expensive if properly organised in the light of carefully planned objectives.

143. In the foregoing notes attention has been drawn to some of the factors which should be taken into account when designing surveys. These considerations can form the basis for many different types of inquiry and no attempt has been made here to propose any particular arrangement for general application.

144. The revised UN System of National Accounts gives ample guidance on the types of data which should be collected, and it is also important that standardised definitions and classifications should be used for the sake of comparability. However, variations in local conditions and data requirements always call for the planning of surveys on a strictly individual basis.

145. There are fairly good prospects for the development of African surveys provided two conditions are met. Firstly, survey objectives must be specified very much more clearly than in the past, which implies that the planning applications of the results must be determined before surveys are organised. Secondly, the work of designing, conducting and processing the inquiries must be carried out in a thoroughly systematic manner, making full use of all the techniques for ensuring the best use of available resources.

146. The formulation of survey objectives is primarily a task for economic planners. In the present African situation the planners have considerable influence over statistical activities, but appear to be neglecting the need for information on the household sector. They would be in a good position to examine data requirements in this field and to co-operate with statistical offices in initiating suitable programmes of surveys.



Annex I. A comparison of household consumption and expenditure surveys carried out in Africa in the 1950's and 1960's

Sub-region and country	The 1950's					The 1960's				
	No. of surveys carried out	Urban and/or Rural	National and/or partial in coverage	Total number of households analysed (selected)	Results published or not	No. of surveys carried out	Urban and/or Rural	National and/or partial in coverage	Total number of households analysed (selected)	Results published or not
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
<b>North Africa</b>										
1. Algeria	1	U-R	National	1,027 (U) 956 (R)	Yes (1961)	1 <sup>1/2</sup>	U-R	National	10,750	Algiers (1969); other localities (not yet)
2. Morocco	3	U-R	National and partial	2,905 (U) 2,911 (R)	Yes (1958, 1959, 1961)	1	U-R	National	8,000 (approx.)	under preparation
3. Tunisia	1	R	Partial	544 (R)	None	4 <sup>1/2</sup>	U-R	National	2,573 (U) 5,402 (R)	1968 <sup>1/2</sup>
4. Libya	1	U-R	Partial	35 (48)	Yes (1954)	3	U	Partial (Tripoli & Benghazi)	984 (U)	Yes (1962 & 1970)
5. Egypt	1	U-R	National	3,283 (U) 3,090 (R)	Yes (1960)	1	U-R	National	2,304 (U) 1,108 (R)	Yes (1967, preliminary)
6. Sudan	Nil	-	-	-	-	5	U-R	Partial	4,745 (U) 4,476 (R)	Yes
<b>West Africa</b>										
7. Mauritania	Nil	-	-	-	-	Nil	-	-	-	-
8. Senegal	1	U-R	Senegal River Valley	Budget: 226 (U) 493 (R) Food: 60 (U) 303 (R)	Yes (1962)	1	U	Dakar only	742 (U) (903)	None
9. Mali	2	R	Partial	136 (R)	Yes (1961)	Nil	-	-	-	-
10. Ivory Coast	2 (1 (U) 1 (R))	U-R	Partial	550 (U) 222 (R)	Yes (1958)	9 (4 (U) 5 (R))	U-R	Partial	1,993 (U) 2,520 (R)	Except for Kan, all published
11. Upper Volta	1	R	Lobi region	132 (R)	Yes (1961)	1	U-R	Mossi & Western regions	840 (U) 800 (R)	Yes (1966, provisional)
12. Dahomey	Nil	-	-	-	-	1	U-R	National	3,000 Bud (2,860) Food (2,709)	Not yet
13. Niger	Nil	-	-	-	-	3 (1 (U) 2 (R))	R U-R	Partial National	Bud/ 4990 (R) 1,037 (U) 18/ 1,200 (R)	Yes (1966) Yes (1964 & 1969)
14. Gambia	Nil	-	-	-	-	1	U	Bathurst	618 (U)	-
15. Guinea	Nil	-	-	-	-	Nil	-	-	-	-
16. Sierra Leone	Nil	-	-	-	-	3 (2 (U) 1 (U-R))	U U-R	Partial National (?)	667 (U) 1,005 (U) 1,061 (R)	Published, except the survey for rural areas Yes (1965)
17. Liberia	Nil	-	-	-	-	1	U	Monrovia	151 (U)	Yes (1965)
18. Ghana	6 (4 (U) 2 (R))	U-R	Partial	1,779 (U) 2,700 (R)	Yes	3 (1 National 2 Partial)	U-R U-R	National Partial	2,970 446 (U) 695 (R)	Preliminary report (1962) Yes (1968 & 1969)
19. Togo	Nil	-	-	-	-	1	U-R	National	648 (U) 390 (R)	Yes (1967)
20. Nigeria	12 (8 (U) 4 (R))	U-R	Partial	2,399 (U) 1/2 1,010 (R) 1/2	Except for Lagos, Enugu, Ibadan & Kaduna and Zaria, all not published	10 (U) 4 (R) National) 2 (R, regional)	U R R	Partial National Partial	5,726 (U) 12,950 (R) 2/2 640 (R) 10/	Published, except for a few towns and some of the rural surveys

Sub-region A country	The 1950's					The 1960's				
	No. of surveys carried out	Urban and/or Rural	National and/or partial in coverage	Total no. of household analysed (selected)	Results published or not	No. of surveys carried out	Urban and/or Rural	National and/or partial in coverage	Total no. of household analysed (selected)	Results published or not
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
<b>Central Africa</b>										
21. Cameroun	1	R	Partial	...	Yes (1956)	4	U-R	Partial	764(U) 770(R)	Yes (1965 to 1969)
22. Chad	Nil	-	-	-	-	1	U-R	Partial	418(U) 708(R)	Yes (1968)
23. Central African Republic	1	R	Partial	33(R)	Yes	1	R	Partial	250(R)	None
24. Gabon	Nil	-	-	-	-	4((2(U) 2(R)	U-R	Partial	810(U) 500(R)	Yes (1969), except for the 1967/68 Libreville survey.
25. Congo (Brazzaville)	1	U	Partial	593(U)	Yes	2 (1(U) 1(R)	U-R	Partial	1,000(U) 169(R)	Results for Brazzaville (1965/66) not published.
26. Zaïre	1	U	Partial	46(U)	Yes (1961)	21/	U	Kinshasa only	1,661(U)	...
<b>East Africa</b>										
27. Rwanda	1	R	Partial	1,240(R)	Yes (1966)	Nil	-	-	-	-
28. Burundi	1	R	Partial	...	Yes (1960)	2	U	Bujumbura only	253(U)	Yes (1965 & 1966)
29. Southern Rhodesia	3	U	Partial	2,186(U)	Yes	3	U	Partial	788(U)	Yes
30. Zambia	1	U	Partial	...	None	21/	U	Main Towns	3,804(U)	Results for 1966-68 survey not published.
31. Malawi	21/	U-R	Partial	...	Yes	2	U-R	All Towns and agri- cultural estates	4,104(U) 1,037(R)	Yes (1970)
32. Madagascar	Nil	-	-	-	-	4 (2(U) 2(R)	U-R	Partial (U) National (R)	1,763(U) 5,553(R)	Results for 1968/69 surveys of Tananarive and 4 rural zones not yet published.
33. Mauritius	Nil	-	-	-	-	2	U-R	National	1,053(U) 760(R)	Yes (for 1961/62 survey)
34. Tanzania	4	U	Partial	466(U)	Yes	6 (1(U-R) 3(U) 2(R)	U-R	National Partial Partial	2,800(U-R) 234(U) 956(R)	In process Yes Yes
35. Uganda	9	U	Partial	1,080(U)	Yes	6 (5(U) 1(R)	U R	Partial Partial	841(U) 1,200(R)	Yes Yes
36. Kenya	2	U	Partial	409(U)	Yes	3	U-R	Partial	3,684(U) 900(R)	Yes
37. Somalia	Nil	-	-	-	-	1	U	Mogadiscio	600(U)	Yes (1967)
38. Ethiopia	2	U	Partial	206(U)	Yes	4 (3(U) 1(R)	U R	Partial Partial	1,255(U) 1,677(R)	Yes Yes
39. Botswana	Nil	-	-	-	-	6(U)	U	Partial	2,612(U)	Yes (1970 & 1971)
40. Lesotho	Nil	-	-	-	-	1	R	National (?)	1,801(R)	Under preparation
41. Swaziland	Nil	-	-	-	-	Nil	-	-	-	-

Source: This Annex has been compiled based on an up-dating of a list of  
surveys contained in the ECA document "Reference list of the  
Household Budget - Consumption Survey carried out in Africa"  
(E/CN.14/CAS.6/25), June 1969.

Footnotes:

- 1/ The Household Consumption Survey for Grand Alger, 1966/67, and the national survey (excluding Algiers), 1967/68, are taken together here as one national survey.
- 2/ The national household consumption and expenditure survey for 1959/60 (Sep. 59 - Jan. 60) has been allocated to the 50's and that for 1970/71 (April 1970 - April 1971) allocated to the 60's.
- 3/ Results for the surveys for the 6 Northern governorates, the 7 Central and Southern governorates and 4 main towns were published; however, results for the low and middle incomes survey of Tunis, 1960/61, have not been published.
- 4/ The surveys for the Western, Northern, Southern and Eastern Provinces are taken here as one national survey.
- 5/ The three separate surveys, namely, survey for the Western Province (rural and urban), 1967-68; the survey for urban areas in the Northern, Southern and Eastern Provinces, 1968-69, and the survey for rural areas in the same provinces, 1969-70, have been counted here as one national survey, covering both urban and rural areas.
- 6/ Including a survey in the Eastern Region (rural) carried out from May 1959 to February 1960.
- 7/ Excludes urban surveys of wage-earners' households up to £ 400 per annum, carried out in Benin, Warri, Sapele (1956), in Calabar, Port Harcourt, Aba (1956/57), Ilorin (1957/58), and Kano (1958). Information on number of households selected for these surveys is not available.
- 8/ Excludes the survey of part of the Northern Region (rural) (1956/57), for which no pertinent information is available.
- 9/ Figure refers to the national Rural Economic Surveys (Household Consumption Expenditure) for the 4 years 1962/63 - 1965/66. It is known that the survey has been carried out annually since, and the data for 1969/70 are known to be available.
- 10/ Refers to the rural survey carried out in the Eastern and Western Regions in May 1961 to March 1962 only. Corresponding information for a similar survey carried out there in 1960/61, is not available.
- 11/ This figure includes some urban households included in the survey for Adamaoua (1963/64).
- 12/ The results for the survey of Kinshasa carried out during Jan. - Dec. 1969, not yet available.
- 13/ Figure refers to the survey carried out in 1955-56 in the former Belgian Ruanda-Urundi, breakdown of the total into Rwanda and Burundi being not possible.
- 14/ Represents two rounds of surveys of main towns, carried out in 1960 and 1966-68 respectively.

- 15/ Refers to two surveys carried out in 1957 & 1958 covering low-income households in Blantyre. The results were published by the Rhodes-Livingstone Institute, Lusaka.
- 16/ The rural consumption survey of 1961-63 was of national coverage, while a similar survey of 1968-69 covered 4 rural zones only.
- 17/ Excludes pilot surveys, for which no published information is available (Zaire: Kinshasa (July - Nov., 1968)).
- 18/ Includes the survey for Niamey, which was taken separately in March 1961 - April 1962.
- 19/ Included in the figure of 956 were 138 households among the Kabyles, a breakdown of the latter figure into urban and rural being not available.