Documentation for the Families in the Middle (FIM) project

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Contents

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1. Introduction

The Families in the Middle (FIM) project is a mixed-methods multi-site study that was led by Anne H. Gauthier (University of Calgary), Shelley Pacholok (University of British Columbia at Okanagan) and Frank F. Furstenberg (University of Pennsylvania) and which took place in 2007-2010. The study was designed to better understand the daily realities of middle-income families in Canada and the United States, including parents' hopes and worries for their children, their financial circumstances, and the impacts of public policy on their day-to-day lives. As such, the key themes of the research included those surrounding everyday family life: families' neighbourhood and community, daily routines, paid and unpaid labour, parenting, health, finances, and governmental support.

This document provides information on the design of the study, research instruments and data collection. It also provides detailed information on the study sites. More detailed information about the quantitative and qualitative data are available in other documents.

2. Overview of the project and collaborators

The FIM project started in the Summer of 2007 when pilot interviews were carried out in Philadelphia and Calgary. Funding for this project was then granted in April 2008 and the data collection started in May 2008 in our first site and lasted until September 2010 in our last site (see Section 10). The project was done in collaboration with:

- University of Calgary: Anne H. Gauthier (PI), Jamie Budd, Jeanna Parsons Leigh

- University of British Columbia at Okanagan: Shelley Pacholok (co-PI), Tara Snape, Kimberly Seida

- University of Pennsylvania: Frank F. Furstenberg (co-PI), Roberta Iversen, Laura Napolitano, Sigrid Luhr, Molly Jenkins (formally from the University of Washington).

The project also benefitted from the work of several other students working as transcribers, fieldworkers, or research assistants (see the list in Section 15).

3. The research design and target population

From the beginning, we decided to target families with early adolescents, aged 10 to 14 years old. Our justification for doing so was that we were particularly interested in parents' educational expectations for their children, including whether or not parents had started to put aside some savings for their children's higher education. In the pilot fieldwork done in Calgary, where we had interviewed some parents with younger children, it however quickly became apparent that parents with younger children had only very vague ideas about their expectations regarding their children's future schooling. Collecting data with older children seemed therefore to be imperative.

Our mixed-methods design involved a two-step process:

- First, parents with children age 10 to 14 years old of all income groups were invited to fill out a first survey (referred to in the project as the 'short' questionnaire). This survey

included questions on the demographic characteristics of respondents along with their experience of financial strain. This resulted in a sample size of around 830 in Canada and 390 in the USA (see Section 12). At the end of the survey, respondents were asked if they would be interested in participating further in our project.

- Second, from the respondents who indicated that they would be interested in participating further, we then selected those with a middle income (defined below) and invited them to the next step of the project. This involved filling out a second survey (the so-called "long" questionnaire) and participating in an in-depth interview. The long questionnaire was collected to provide the fieldworker with more background information on the participants, and to help the participants themselves to start reflecting on their experiences as parents.

The research design is summarized in Figure 1 below.

Figure 1. Research design
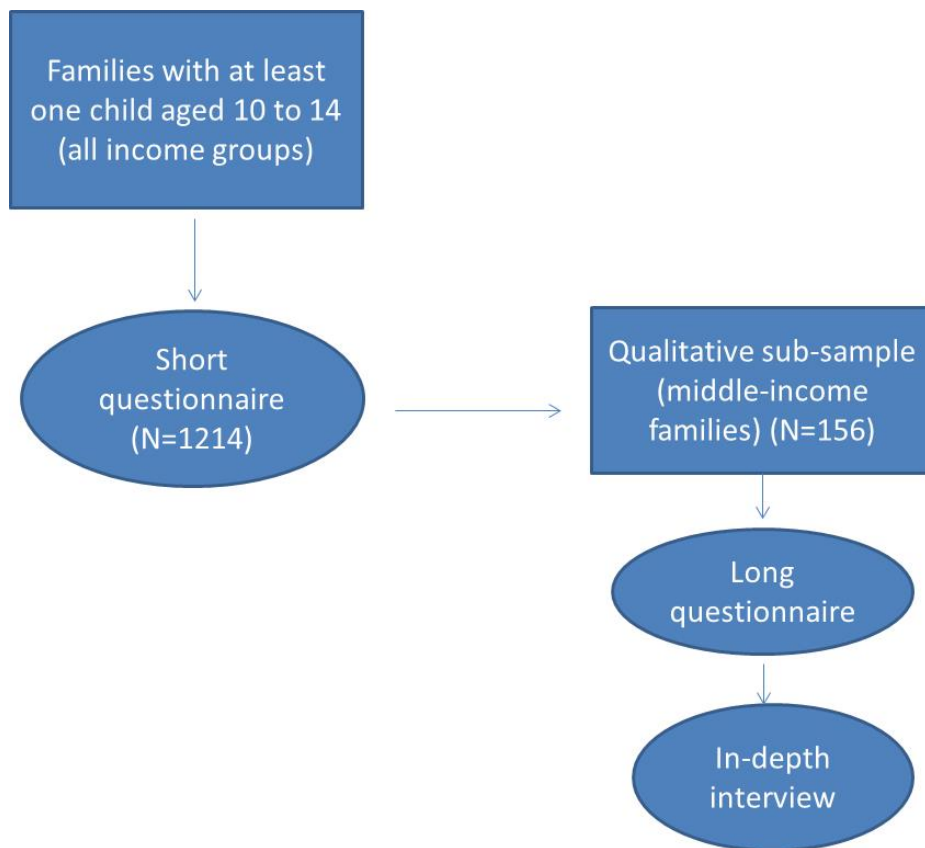
As explained in Section 11, in one of the American sites, a longitudinal element was introduced in that the qualitative participants were re-contacted and re-interviewed one year later.

4. Research instruments

As mentioned above, we used three research instruments: a short and a long questionnaires, and an in-depth interview.

Survey Instruments

- The short questionnaire collected mainly background information about the respondent (e.g. education, marital status, employment status) and information about the financial situation of his/her household (e.g. difficulty making ends meet).

- The long questionnaire (which was filled out only by middle-income participants), collected mainly information about the family environment (e.g. gender division of housework), views about parenting, as well as some additional information about the financial situation of the household.

The same short and long questionnaires were used in all the Canadian sites (with the Montreal questionnaires being translated into French) and in Tacoma. Slightly different questionnaires were used in Philadelphia simply because this was our first site and that some small modifications were introduced after the completion of the fieldwork.

Qualitative interview

The qualitative data were collected via a semi-structured interview. The interview guide covered five main themes:

- (1) *Neighbourhood and community*: including a description of the neighbourhood and its inhabitants, and parents' overall satisfaction with their neighbourhood;

- (2) *Daily routine and family life*: in which parents were asked to describe a typical weekday, as well as leisure activities of the family. Parents were further asked about the balance between work and family life, the division of household labour in their family, and children's own schedule and activities.

- (3) *Parenting*: included questions on parenting challenges, children's education, and the hopes and expectations parents have for their children. Parents were asked to describe what makes a good parent today, and were stimulated to reflect on differences with parenting in the past;

- (4) *Health and caregiving*: this section of the interview discussed health issues within the family, and who is responsible for health and caregiving;

- (5) *Financial situation and standard of living*: contained questions on constraints and consumer pressures experienced by the families.

On average, the interviews lasted around 75 minutes, although some lasted much longer. The interviews were particularly long in our first site (Philadelphia). We subsequently revised the interview guide to shorten the interviews although still covering all of our themes.

The original version of these research instruments were in English. They were subsequently translated into French by one of our bilingual fieldworkers from London (Ontario) in collaboration

with Anne Gauthier (native French speaker). They were further corrected by our French-speaker fieldworker in Montreal in collaboration with A. Gauthier.

5. Definition of middle-income

There is no agreement in the literature as to how to define middle-income families. While some authors refer to families in the middle quintile of the income distribution as being in the middle, others use instead a range around the median to define the middle. We used the latter approach and defined middle income as 75 to 125% of the median income of families. Other authors who have used the same definition include Birdsall et al (2000), Pressman (2006) and Thurow (1987). In our case, this translated into a middle income ranging roughly from US$45,000 to $75,000.

As shown in Table 1 below, we however expanded the upper limit of our range when recruiting participants to reflect the fact that the median income that we were using as reference for our calculations included families with and without children. Families with children would thus need to have a larger income in order to have the same standard of living. Enlarging our income range also allowed us to assess the extent to which the topics of interest did vary with income. Consequently in some of our subsequent analyses, and when there was evidence that income and family size did matter, we restricted our subsample to the first two income groups (in Table 1 below) and to families with two or three children. In other cases, we used the full sample.

The range of values included in our definition of middle-income appear in Table 1 below. What is further interesting to note here is that the median family income of the two countries are roughly similar. Using the parity purchasing power index for 2009, the Canadian and American values are US$56,903 and US$62,363 respectively.

Table 1. Middle-income statistics (2009 inflation-adjusted dollars)[1]

	Median family income	Middle income range (75 – 125%)	Corresponding middle income groups in our short questionnaire[4]
Canada[2]	Cdn $68,283	$51,212 – 85,354	50 – 69K 70 – 89K 90 – 109K
USA[3]	US $62,363	$46,772 – 77,954	45 – 59K 60 – 74K 75 – 89K

Notes: 1- All the income statistics reported in this document refer to the year 2009 simply to reflect the fact that most of our fieldwork was carried out that year; 2- The Canadian data are from the 2006 Census and correspond to the median income of census families (following the definition used by Statistics Canada). The original data (in 2005 Canadian dollars) was $63,866. This was converted in 2009 inflation-adjusted

dollars using the values of the Consumer Price Index for Canada: 2005 = 107.0; 2009 = 114.4 (2002 = 100). The parity purchasing power index for 2009 was 1.20; 3- The American data are from the 2005-2009 American Community Survey – 5-year estimates and correspond to the median household income of all families (in 2009 inflation-adjusted dollars).; 4- As explained in the text, we also included respondents with a larger income to indirectly take into account family size. More information on this appears in Appendix.

Sources: Income data: For Canada, from the 2006 Community Profile online: online: http://www12.statcan.gc.ca/census-recensement/2006/dp-pd/prof/92-591/index.cfm?Lang=E ; For the USA, from the US Census Bureau American Fact Finder, table S1903 online: http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_09_5YR_S1903&prodType=table ; Consumer Price Index: for Canada from Statistics Canada, Historical series online: Online: http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/econ46a-eng.htm; Parity purchasing power: from the OECD, online: http://stats.oecd.org/Index.aspx?DataSetCode=PPPGDP .

6. The FIM fieldwork sites

The FIM project is about families with a middle income (see section 5 above). Thus the element of comparability is that all the families included in the qualitative sample have a middle income. These middle-income participants were however recruited from different sites within Canada and the USA in order to diversify our sample in terms of its institutional and policy context. In the USA, the participants were recruited from one site on the East Coast (Upper Darby in Pennsylvania) and one site on the West Coast (Tacoma in Washington State). In Canada, we recruited participants from five sites from four different provinces: Montreal (province of Quebec), London (province of Ontario), Calgary (province of Alberta), Okanagan Valley (province of British Columbia) and the Greater Vancouver area (province of British Columbia).

As can be seen in Table 2 below, these sites vary largely in terms of population size and to some extent in terms of their median income. What they however share is that they are all urban sites located within or at proximity from a large metropolitan area (with the exception of the site in the Okanagan Valley).

Table 2. Fieldwork sites of the FIM project

Site	Population size[1]	Median family income (2009 US$)[2]	Brief description
Upper Darby	78,962	$65,371	Mid-size city located within the Greater Philadelphia area (Pennsylvania state).
Tacoma	196,118	$57,458	Large city within the Seattle-Tacoma metropolitan area (Washington state)
Montreal	1,620,693	$44,521	Large metropolitan area in the province of Quebec. Most of the interviews were carried out in the city of Montreal, but a few were carried out in other cities in the Greater Montreal area. The statistics here refer to

			the city of Montreal.
London	352,395	$59,711	Medium-size city in the province of Ontario (located about 170 kms from Toronto)
Calgary	988,193	$69,191	Large city in the province of Alberta
Okanagan	106,707	$52,700	(City of Kelowna) Medium-size city in the province of British-Columbia. Located relatively far from other large metropolitan areas (about 275 kms from Vancouver).
Vancouver	114,565	$59,722	(City of Coquitlam) Medium-size city in the greater Vancouver area (province of British-Columbia). A small number of respondents were instead recruited from the city of New Westminster, also part of the Greater Vancouver area.

Notes: 1- For Canada: population size in 2006 (from the 2006 Census); for the USA, population size from the 2005-2009 American Community Survey – 5-year estimates; 2- For the conversion in into 2009-inflation adjusted US dollars, see the notes in Table 1.

7. Recruitment methods

In the various sites, different methods were used to recruit participants (i.e. to get them to fill out the short questionnaire). In the American sites the recruitment was mainly done through schools and a small monetary incentive was provided. In the Canadian sites, recruitment through schools proved to be difficult because of the reluctance of school boards and principals to grant us access to schools. Instead, we mainly relied on numerous other recruitment strategies including working through community partners and local groups, online advertisements (e.g. Facebook), newspapers, etc. We also attempted to use snow-balling techniques to recruit participants but in all sites this did not produce much results. All participants interviewed said that they had enjoyed the experience, and we encouraged to let others know about our project, but this did not help with our recruitment.

Importantly, and because our initial survey targeted families from all income groups, no mention of middle-income appeared in our recruiting material. That our focus was on middle-income was not made explicit either in the interviews. Instead, questions were phrased as ''families like yours'' with no mention of income or social class status. On the other hand, our recruiting material did often used the phrasing "Do you find parenting challenging" simply as a way of attracting the attention of potential participants. Perhaps as a consequence of this, we seem to have attracted a number of families with children in greater needs (e.g. ADHD). These however formed only a minority of families in our sample.

More information about the recruitment strategies used in each site is provided below.

- In Upper Darby (Philadelphia), the recruitment of participants was done through two middle-schools which had agreed to send the questionnaire to parents via the monthly school packets. A monetary incentive was offered in the shape of a $5 donation by the research team to the family's individual middle school for each family that participated in

the survey. Furthermore, $60 was offered to the respondents for their participation in our interview.

- In Tacoma, a similar approach was used initially, which consisted of recruiting parents through two middle-schools. Instead of sending hard copies of the questionnaire to parents, a letter signed by the superintendent was sent to parents encouraging them to fill out the on-line version of the survey. Subsequently, the sample was extended through various recruitment techniques including web advertisements, distribution of flyers and advertisements in local newspapers. Again, for each family that participated in the survey, the research team offered to donate $5 to the family's individual school. A monetary incentive of $60 was offered to the participants for taking part in our interview.

- In Okanagan, an initial attempt at recruiting participants was made through the public school board and involved one presentation made by S. Pacholok at a parents-teacher meeting. This was followed by an email to all parents of the school by the director inviting them to fill out the on-line version of the survey. In addition, posters and advertisements on castanet were used to extend the sample.

- In London, parents were invited to participate through a post in the newsletter of a middle school. Posters and flyers were distributed at community and recreational centres and a local fair, and an advertisement was posted on an online forum for mothers (London Mom's).

- In Montreal, participants were recruited through sport centres and the distribution of posters. In addition, the fieldworker used her personal contacts to recruit participants.

- In Vancouver, parents were recruited through the Parent Advisory Council and advertisements in the local news.

- In Calgary, respondents were reached through an agency for parenting education, cultural and soccer clubs, and advertisements in the news.

In the Canadian sites, the participants were not paid for participating in the project. However, those who filled in the short questionnaire could elect to take part in a draw. For each site, an amount of $50 dollars was offered to one of the survey respondent through a random draw.

8. The age target

As explained earlier, our target was parents with young adolescents aged 10-14 years old. A further practical reason for targeting children age 10 to 14 was that Frank Furstenberg had already established some contacts with the school board in Upper Darby thus providing us with some access to the two middle-schools located in that township (the American middle-schools encompass grades 6 to 8, i.e. about age 10 to 14).

To reach children of that age group, some sites did the recruitment mainly (or solely) through schools while others used a variety of other channels. As a result, a mix of grade-specific and age-specific targets were used in the various FIM sites. A summary of the situation appears in Table 3 below.

Table 3: Summary of the target population in the different sites[1]

Site	Recruitment target[2]	Age equivalent
Philadelphia	Children in middle school (grades 6 to 8)	Age 11 to 14
Tacoma	Children in middle school (grades 6 to 8)	Age 11 to 14
Montreal	Children age 9 to 14 years old	Age 9 to 14
London[3]	Children age 9 to 14 years old + grades 5 to 9	Age 9 to 14
Calgary	Grades 5 to 9	Age 10 to 15
Okanagan[4]	Children in middle school (grades 7 to 9) + grades 5 to 9	Age 10 to 15
Vancouver	Children in grades 5 to 9	Age 10 to 15

Notes: 1- The institution of middle-school does not exist in all Canadian provinces, and when it does it covers different school grades than in the USA; 2- Target as phrased in the recruitment material used in each site.

Sources: Local fieldworkers and local resources, as well as
http://en.wikipedia.org/wiki/Education_in_Canada#Grade_structure_by_province
http://en.wikipedia.org/wiki/Middle_school
http://en.wikipedia.org/wiki/School_District_23_Central_Okanagan

9. The pre-FIM pilot

Pilot interviews were carried out in the summer of 2007: nine of them in Philadelphia and five in Calgary. Following these pilot interviews, we held a first team meeting in Calgary and subsequently revised our questionnaire and interview guide. Note that the year before, Furstenberg had also carried out some pilot interviews in the UK during a sabbatical in Spring 2006. We carefully reviewed these pilot interviews when developing the first version of our interview guide for the FIM project.

10. Timing of the fieldwork and modes of data collection

The official data collection started in May 2008 in our first site (Philadelphia) while the other sites followed later. The majority of the data were collected in 2009. The exception is the French-speaking site of Montreal where the data collection took place in 2010. What this means is that our fieldwork took place in most sites in the midst of the economic recession. More information about this appears in Appendix.The date of the fieldwork in the various sites appears in Table 4 below.

Table 4: Timing of the quantitative and qualitative data collection in the FIM sites

	Survey	Interview
Philadelphia (Wave 1)	May 2008- June 2008	June 2008 - August 2008
Philadelphia (Wave 2)	-	June 2009 - November 2009
Tacoma	April 2009 - January 2010	June 2009 - January 2010
Montréal	January 2010 - July 2010	February 2010 - September 2010
London	June 2009 - August 2010	September 2009 - July 2010
Calgary	July 2009 - March 2010	August 2009 - February 2010
Okanagan	December 2008 - October 2009[1]	April 2009 - October 2009
Vancouver	December 2008 - October 2009	June 2009 - April 2010

Note: 1- One respondent filled out the questionnaire in April 2010.

The wave 2 interviews in Philadelphia: because the fieldwork in our Philadelphia site took place earlier than in the other sites, and because of the on-going economic recession at the time, the local team decided to re-contact participants in the qualitative interview and to re-interview them one year later. The format of the interview covered the same themes as in the first one but with a focus on changes in the past 12 months, and especially on the financial situation of families. In total, 25 of the original 31 participants were re-interviewed. During this second fieldwork period, five participants who had filled out a short questionnaire one year earlier but were not interviewed at the time were also interviewed. All these participants had a higher household income and were added to follow the project's decision to enlarge our definition of middle income (see section 5).

Survey data: In all sites but Philadelphia, an online tool was used to collect the survey data. This was done mainly for practical reasons: it saved us a lot of money since we did not have to pay an assistant to subsequently enter the data. We opted for the tools provided by SurveyMonkey (see below). In Philadelphia, a paper version of the questionnaire was instead used and the data was subsequently entered by Furstenberg's administrative assistant in a digital format. In a few sites, participants were offered the opportunity to fill out a paper version of the questionnaire if they preferred. A few did so and the data was subsequently entered in SurveyMonkey by the fieldworker.

As to our experience with on-line data collection, we were overall very satisfied with the SurveyMonkey tools. There were however two major drawbacks. First, the name SurveyMonkey, although quite well known among people doing survey research, did not inspire much confidence from parents and made the recruitment of participants somewhat more difficult. Second, because this was an online survey, and although the survey made clear that it was addressed at parents with children age 10-14 years old, it appeared to have been filled out in about 5 percent of the cases by respondents who did not have children or were below the age of 18 (see below for more information).

Qualitative data: In an ideal world, we would have liked to interview both spouses in the case of two-parent families (and if possible separately). In practice, and especially because of difficulties in recruiting participants, we left it up to the participants as to who would be interviewed, ie one parent only or together as a couple. As a result, the very large majority of the interviews was carried out with the mother only. In 13 cases it was carried out with the father only (about half of them involving a divorced or separated father), and in 7 cases with both spouses present.

12. The sample

Information on the size of the sample in each site is displayed in Table 5 below. This translates into a total of 61 interviews in the US (at wave 1), and 95 in Canada. As explained earlier, an additional 5 cases were added at a later stage in the US. These additional cases are not included here.

Table 5: Number of respondents (wave 1)

Sites	Total number of respondents for the questionnaire[1]	Effective sample[2]	Total number of qualitative participants[3]
Philadelphia (Upper Darby)	248	245	31
Tacoma	145	135	30
Montreal	129	116	15
London	177	167	19
Calgary	127	112	17
Okanagan	205	189	21
Vancouver	190	175	23
Total	1214	1139	156

Notes: 1- Number of respondents for the first questionnaire (all income groups); 2- Excluding respondents aged under 18 and respondents without children; 3- This number includes six participants with a lower income and five participants with a higher income. These participants were interviewed as a sort of a test case in order to provide some information on variations in parenting experiences by income level.

As also explained earlier, the guidelines provided to the fieldworker was to recruit for the interviews participants who matched our definition of middle-income and who ideally had two or three children. We also encouraged the fieldworkers to diversify their sample not only in terms of recruitment methods but also in terms of their demographic characteristics. In particular, we asked them to make sure that the sample included single-parents and married ones, as well as parents from different employment statuses. In particular, we wanted to avoid a situation where we would have a large over-representation of stay-at-home mothers. The resulting summary of the demographic characteristics of

our qualitative sample appears below in Table 6.As can be seen, the resulting breakdown of our sample is very similar for the two countries.

Table 6. Descriptive statistics of the qualitative sample (wave 1)

	Canada	US	Combined sample
Mean age	42.5	43.0	42.7
% Married or cohabiting	77.9	68.9	74.4
% Some post-secondary degree	74.7	72.1	73.7
% Employed	62.1	68.9	64.7
% Homeowner	85.3	83.6	84.6
Mean number of children (0-17)	2.44	2.46	2.45
Number of participants	95	61	156

13. Training of fieldworkers, transcribing, and coding of the interview data

The first data collection having taken place in Philadelphia, we built on the knowledge acquired in this site to subsequently review our research instruments. We also held a training workshop for the fieldworkers in Spring 2009 (hosted by S. Pacholok) in order to provide more consistency across our different sites. Fieldworkers from Calgary, Kelowna, Tacoma, and Vancouver attended the workshop. Subsequently, training to the fieldworkers in London was provided by one member of the Calgary team, and the training of the fieldworker in Montreal was provided by one of the London's fieldworkers (who was bilingual). In addition to the interview guide, fieldworkers were also provided with samples of recruitment material, consent forms, etc. as well as training as how to access the data in Survey Monkey. In particular, fieldworkers were instructed to review the answers provided by respondents to both the short and long questionnaires prior to the interview so as to better tailored the questions to the respondent's own situation.

As mentioned earlier, on average the interviews lasted around 75 minutes but several ones lasted much longer. The interviews were audio-recorded (provided that the respondents consented to it).[2] Fieldworkers were also asked to write a memo following each interview giving us their impressions about the interview and adding any potentially useful information. In some cases, fieldworkers also took pictures of the participant's street and neighbourhood. The interview and fieldwork memos were subsequently transcribed by trained students.

For the analysis of the qualitative material, we used the software Atlas-ti or NVivo. All transcripts were moreover assigned a series of 'families' (socio-demographic characteristics) to subsequently facilitate the analysis. All transcripts were coded using a commonly developed list of general

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[2] Only one respondent (in Montreal) did not consent and therefore we only have a summary of this interview, as written by the fieldworker, as opposed to a complete transcript.

codes that reflected the structure of the interview. These general codes are referred to in the project as our level-1 codes. For specific analyses, each researcher or team of researchers developed their own level-2 codes, specific to each subproject.

14. Cleaning of the survey data

The data collected through SurveyMonkey were downloaded at the end of the data collection period and were saved into SPSS. The conversion from SurveyMonkey to SPSS was good but some of the data were entered in various formats by respondents and had to be subsequently cleaned. For example, to the question of how much mortgage they paid every month, respondents answered using various formats, e.g.1500, $1500, 1,500, 1500$, etc. These data had to be corrected manually to provide consistency.

The original file downloaded from SurveyMonkey also contained numerous personal identifiers (e.g. IP address, etc.) . This information was deleted from the final files. A series of personal and site IDs were also added to the SPSS files to facilitate their analysis.

15. Funding for the project and acknowledgements

References

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McDaniel, S., Gazso, A., Um, Seonggee (2013). Generationing relations in challenging times: Americans and Canadians in mid-life in the Great Recession. Current Sociology February 26, 2013 0011392113475806.

Pressman, S. (2006). "The Decline of the Middle Class: An International Perspective" Luxembourg Income Study Working Paper Series, #280, October 2001, revised March 2006.

Thurow, L. (1987), "A Surge in Inequality", Scientific American, 256, pp. 30-37.

APPENDIX: The economic recession

The timing of the fieldwork took place in the midst of an economic recession in most sites. The global economic problem began in December 2007. Officially however, the US went into recession in the fourth quarter of 2008 (i.e. after recording two consecutive quarters of negative GDP growth), while Canada went into recession one quarter later. By the third quarter of 2009, both countries were again experiencing a positive GDP growth (see Figure 2 below).

Figure 2: GDP growth in Canada and the US
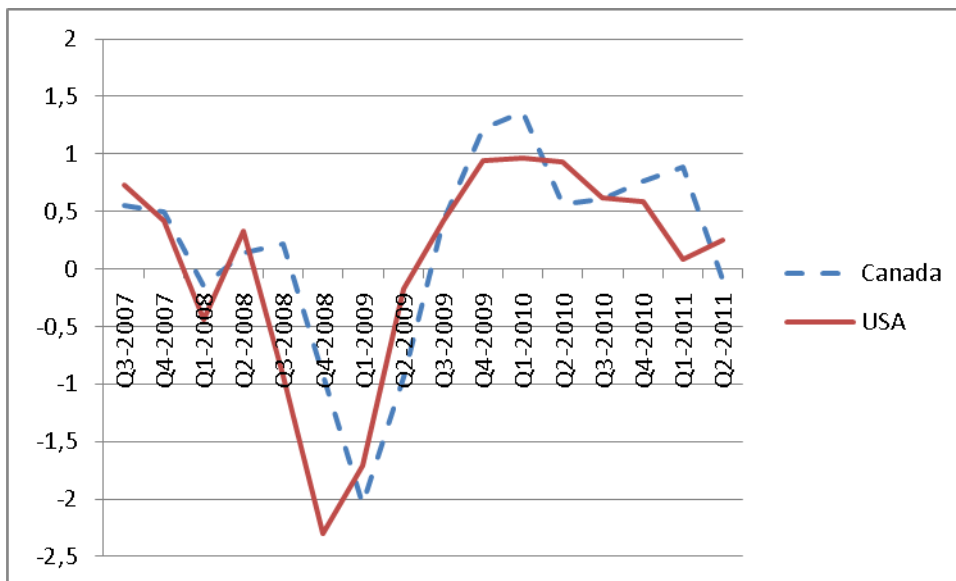
Source: OECD data.

The consequences of this is that the topic of the economic recession was very much on the mind of our participants when we interviewed them. Several of the participants moreover knew of somebody who had lost, or was at risk of, losing his or her job, and several of them were anxious about their own situation. However, very few of our participants were personally affected by the recession. This likely reflect a sample bias in that those most severely affected by the recession did not participate in our project. What we however know from the literature is that families in the United States were on average more affected by the recession than did Canadian ones (McDaniel, Gazso, Um 2013).

APPENDIX: Further information about our definition of middle-income

Alternative definitions of middle-income

The median income used in Table 1 of the documentation is that of all families including families with and without children. As an alternative, we could have elected to use instead the median income of families with children: the rationale being that this is likely the point of comparison used by our FIM participants when assessing their income. As shown below, dependent on the source of data used this alternative does not make a large difference for the USA, but a larger one in Canada.

Table A1: Alternative definitions of middle-income

	Median income	Original data	In 2009 constant dollars[e]	75 – 125%	75 – 150%
Canada	All census families (2005)[a]	63,866	68,283	51,212 – 85, 354	51,212 – 102,425
	Economic families with children (2008) (in 2009 $)[b]	80,784	80,784	60,588 – 100,980	60,588 – 121,176
	Families with children (LIS) (2004)[c]	66,750	72,934	54,701 – 91,168	54,701 – 109,401
USA	All families (2009)[d]	62,363	62,363	46,772 – 77,954	46,772 – 93,545
	Families with children (2009)[d]	60,074	60,074	45,056 – 75,093	45,056 – 90,111
	Families with children (LIS) (2004)[c]	56,799	64,508	48,381 – 80,635	48,381 – 96,762

Notes:

a: From the 2006 Canadian census, data retrieved from the online 2006 Community Profiles. The data refer to the ''Median income in 2005 - All census families'', online: http://www12.statcan.gc.ca/census-recensement/2006/dp-pd/prof/92-591/index.cfm?Lang=E ;

b: The data refer to economic families and the median was computed as a weighted average of the median income of two-parent families with children and that of lone-parent families (ie weighted by the number of families of each type), own calculation, source: Statistics Canada, Income in Canada 2009, online: http://www.statcan.gc.ca/pub/75-202-x/75-202-x2009000-eng.htm;

c: Own calculation from the Luxembourg Income Study data, not adjusted for family size;

d: From the 2005-2009 American Community Survey 5-year estimates (median income in the pas t12 months (in 2009 inflation-adjusted dollars)), online: Table S1903; http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_09_5YR_S1903&prodType=table

e: For Canada, the values of the Consumer Price Index are: 2004 = 104.7; 2005=107.0; 2009 = 114.4 (2002 = 100), from: Statistics Canada, Consumer Price Index, historical summary. Online: http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/econ46a-eng.htm ; For the USA, the values of the Consumer Price Index are: 2004 = 188.9; 2009 = 214.537 , Source: CPI Detailed Report as Table 24, Online: http://www.bls.gov/cpi/tables.htm . The value of the Power Purchasing Power index (from OECD) for 2009 is: 1.20 (source: online: http://stats.oecd.org/Index.aspx?DataSetCode=PPPGDP .).

What if we had used a decile approach instead?

We elected in our FIM project to define the middle as a range around the median. An alternative, used in several studies, is instead to define the middle income group based on specific decile or quintile of the income distribution (e.g. the middle quintile, or middle 20%). It is therefore useful to reflect further about the correspondence between these two approaches. An illustration is provide below using the LIS data.

In the Canadian case, and applying our 75%-125% definition, we found that 30% of families with children have a middle income. The median income for this group is 66,840 and is therefore very close to the figure obtained for the families in the 5th and 6th deciles (see Table A2). The latter group captures however only 20% of the families with children. Expanding our range to 30%, the median based on our definition appears to be situated between that of the 4th to 6th deciles and 5th to 7th deciles. In other words, there is no perfect correspondence between results based on our definition and that used in a decile approach but the results do not differ widely. Similar results are obtained for the USA.

Table A2. Median income of families with children, LIS data (year 2004) (all non-adjusted for family size)

Median income of the middle-income group among families with children (in LIS):	Canada (in CDN 2004$)	USA (in US 2004$)
75% to 125% definition (~middle 30%)	66,840	53,338
5th to 6th deciles (middle 20%)	67,225	56,999
4th to 6th deciles (middle 30%)	61,894	51,835
5th to 7th deciles (middle 30%)	73,242	63,015

Notes: 1- This is the median income reported earlier in this document but converted into 2004 dollars using the value of the CPI for each country: Canada (2004 = 97.83; 2008 = 106.65); USA (2004=96.72; 2008=110.25).

How about the adjustment for family size?

Our initial idea was to formally adjust for family size following the In practice done in the Luxembourg Income Study project. However, and because the household income was captured in our short questionnaire through very broad income groups, it became very complicated to properly and accurately adjust for family size. Instead, the advice given to fieldworkers was to give preference to families with two or three children when recruiting participants for the interview. Because of difficulties in recruiting participants, we ended often deviating from this and included also families with a smaller or larger number of children. We acknowledge that this is not a perfect way of dealing with this as it ignores the situation of single- vs. two-parent families (ie number of adults). Only precise data on the household income would have allowed us to properly adjust for family size

How about the variations across sites in the median income of families and in the cost of living?

As reported in Table 2, there were some variations across sites in the median income of families, with the largest ones being observed between Montreal (lower median income) and Calgary (higher median income). Our initial idea was to correct for these differences using a cost-of-living index. However, this proved to be too difficult, especially in getting indices that would apply for both Canadian and American cities, but again because a precise adjustment would have required precise data on the household income of our participants (while instead we had only data in broad income groups). As a result, we used the same definition of middle-income in all sites. We do acknowledge that with the same middle-income, two families from different sites may well be facing different purchasing power. However, and ultimately, our design is set up to analyse data at the national level and not to compare the experience of participants across sites. Users interested in digging further into this are encouraged to use the information we collected about the families' mortgage, savings, expenditures, etc.