

How the Census Bureau Measures Poverty

With Selected Sources of Poverty Data

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Social, Economic and Housing Statistics Division

U. S. Census Bureau

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Authority Behind the Official Poverty Measure

- The official measure of poverty was established by the Office of Management and Budget (OMB) in Statistical Policy Directive 14 (May, 1978) and is designed to be used by federal agencies in their statistical work.
- Official poverty data come from the Current Population Survey (CPS) Annual Social and Economic Supplement (ASEC).

Determining Poverty Status - Definitions

- A family is a group of two or more people who are related by birth, marriage, or adoption and residing together.
- Family household is a household maintained by a householder who is in a family (see above), and may also include unrelated people or unrelated subfamily (see below) who may be residing there.
- Nonfamily household is a household which consists of a householder living alone (a one-person household) or where the householder shares the home exclusively with people to whom he/she is not related.
- Unrelated subfamily, (identified as poverty measurement resource unit in the Current Population Survey, but NOT in ACS) is a family composed of a married couple with or without children, or a single parent with one or more own never-married children under 18 years old living in a household. Members of the unrelated subfamily are not related to the householder.
- Unrelated individual is defined as a person who is a householder living alone or living with nonrelatives only; or a household member who is not related to the householder, or a person living in non institutional group quarters.
- Unmarried partner (UMP) is a person who is 15 years of age or over, not related (by birth, marriage, or adoption) to the householder, who shares living quarters with, and identified as UMP. In the official poverty measurement resource unit, UMP are treated as unrelated individuals.

Current Poverty Measurement Resource Unit (poverty universe)

- All people in family households who are related to the householder.
- Unrelated subfamily – (used in Current Population Survey but not in American Community Survey) a family composed of a married couple with or without children, or a single parent with one or more own never-married children under 18 years living in a household.
- Unrelated individuals 15 years and older.

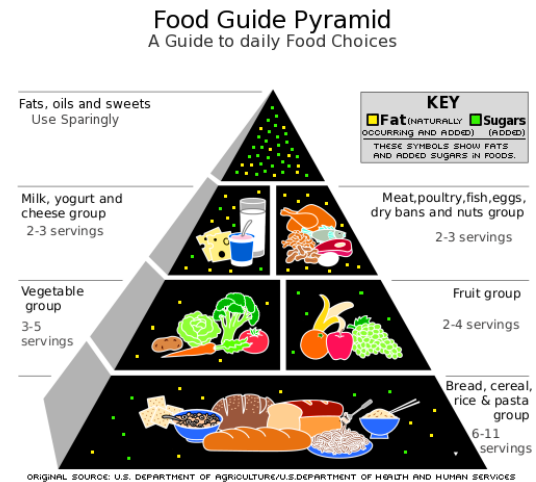
How is Poverty Defined?

Resource



Money Income

Need



Thresholds
(Orshansky)

Defining Resources: Income

- Money income
- Before taxes
- Noncash benefits (such as food stamps and housing subsidies) **do not** count.
- Excludes capital gains or losses.
- If a person lives with a family, add up the income of all family members. (Non-relatives, such as housemates, do not count.)

Income Sources Used to Compute Official Poverty Status Include:

- Earnings
- Unemployment compensation
- Workers' compensation
- Social Security
- Supplemental Security Income
- Public assistance
- Veterans' payments
- Survivor benefits
- Pension or retirement income
- Interest
- Dividends
- Rents
- Royalties
- Income from estates
- Trusts
- Educational assistance
- Alimony
- Child support
- Assistance from outside the household
- Other miscellaneous sources

Measure of Need (Poverty Thresholds)

- Poverty thresholds (poverty levels) are the dollar amounts used to determine poverty status.
- Poverty thresholds were originally derived in 1963-1964, based on:
 - U.S. Department of Agriculture food budgets designed for families under economic stress.
 - Data about what portion of their income families spent on food to estimate total income.
 - Equivalence scale calculate total income for different family size and compositions.

Measure of Need—Con.

- Thresholds vary according to family size, number of related children, and age of householder.
- The same thresholds are used throughout the United States (do not vary geographically).
- Updated annually for inflation using the Consumer Price Index for All Urban Consumers (CPI-U). *<https://data.bls.gov/cgi-bin/surveymost>*

2016 Thresholds (used with CPS ASEC)

Poverty Thresholds for 2016 by Size of Family and Number of Related Children Under 18 Years										
Size of family unit	Weighted average thresholds	Related children under 18 years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or more
One person (unrelated individual):	12,228									
Under age 65.....	12,486	12,486								
Aged 65 and older.....	11,511	11,511								
Two people:	15,569									
Householder under age 65.....	16,151	16,072	16,543							
Householder aged 65 and older.....	14,522	14,507	16,480							
Three people.....	19,105	18,774	19,318	19,337						
Four people.....	24,563	24,755	25,160	24,339	24,424					
Five people.....	29,111	29,854	30,288	29,360	28,643	28,205				
Six people.....	32,928	34,337	34,473	33,763	33,082	32,070	31,470			
Seven people.....	37,458	39,509	39,756	38,905	38,313	37,208	35,920	34,507		
Eight people.....	41,781	44,188	44,578	43,776	43,072	42,075	40,809	39,491	39,156	
Nine people or more.....	49,721	53,155	53,413	52,702	52,106	51,127	49,779	48,561	48,259	46,400

Source: U.S. Census Bureau.

Determining Poverty Status—Con.

- Compare
 - Total income of an individual from all sources with appropriate threshold or
 - Total family income (total individual income from all sources for all family members) with appropriate threshold, then
- If total family income is less than the threshold appropriate for that family,
 - The family is in poverty.
 - All family members have the same poverty status.
 - For individuals who do not live with family members, their own income is compared with the appropriate threshold.

Determining Poverty Status—Con.

- For example:
 - A total family income for a family of three with one child under 18 years in 2016 was \$20,000.
 - The appropriate threshold in 2016 for this type of families was \$19,318.
 - Since the total family income is greater than the threshold, the poverty status for this family of three in 2013 was “above poverty level” (family income of \$20,000 is greater than the threshold of \$19,318).

The Appropriate Threshold in 2016 for This Type of Families was \$19,318

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Source: U.S. Census Bureau.

Observations on the Current Poverty Measure

- The current poverty measure is consistent over the years
- Federal and State governments often use these estimates to allocate funds to local communities

Observations on the Current Poverty Measure— Con.

The official poverty measure does not account for:

- Provision of in-kind benefits (SNAP, LIHEAP, WIC)
- Necessary expenses (taxes, health care, work)
- Changes in family or household structure
- Higher standards and levels of living since 1965
- Geographic price differences among regions

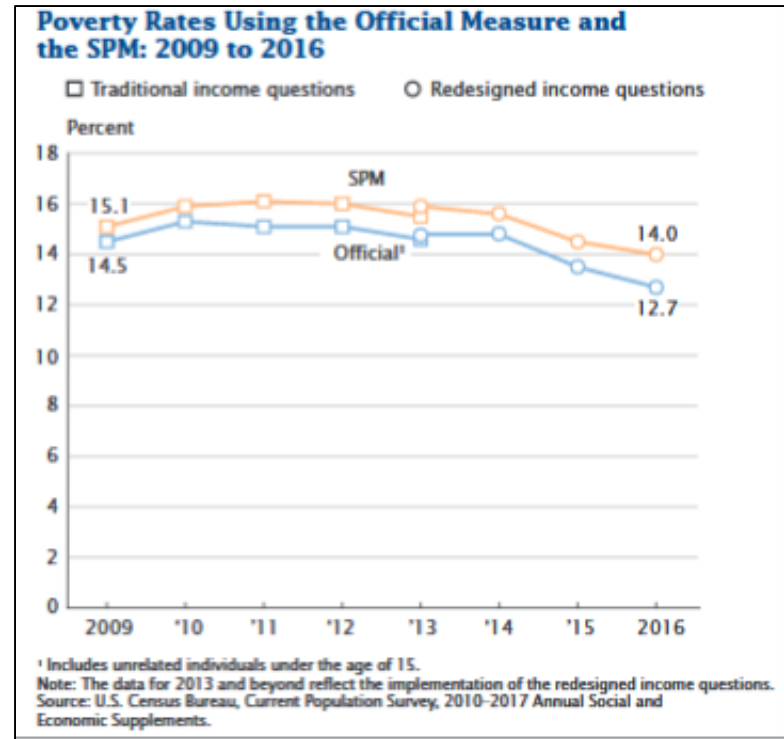
Recommendations to Improve the Official Poverty Measures

Recommendations on Developing a Supplemental Poverty Measure (SPM)

- In 2009, the Office of Management and Budget formed an Interagency Technical Working Group (ITWG) on Developing a Supplemental Poverty Measure. The group issued suggestions for the new measure in March 2010.
- The recommendations were based on National Academy of Sciences expert panel on Poverty and Family Assistance recommendations in “Measuring Poverty: A New Approach” (Citro and Michael, 1995)
- The ITWG recommended that the Census Bureau together with the Bureau of Labor Statistics develop a SPM to improve the understanding of the economic well-being of American families.
- The ITWG suggested that the measure use an expanded resource unit that consists of all related individuals who live at the same address, any co-resident unrelated children who are cared for by the family, and cohabiters and their children.

Recommendations on Developing SPM—Con.

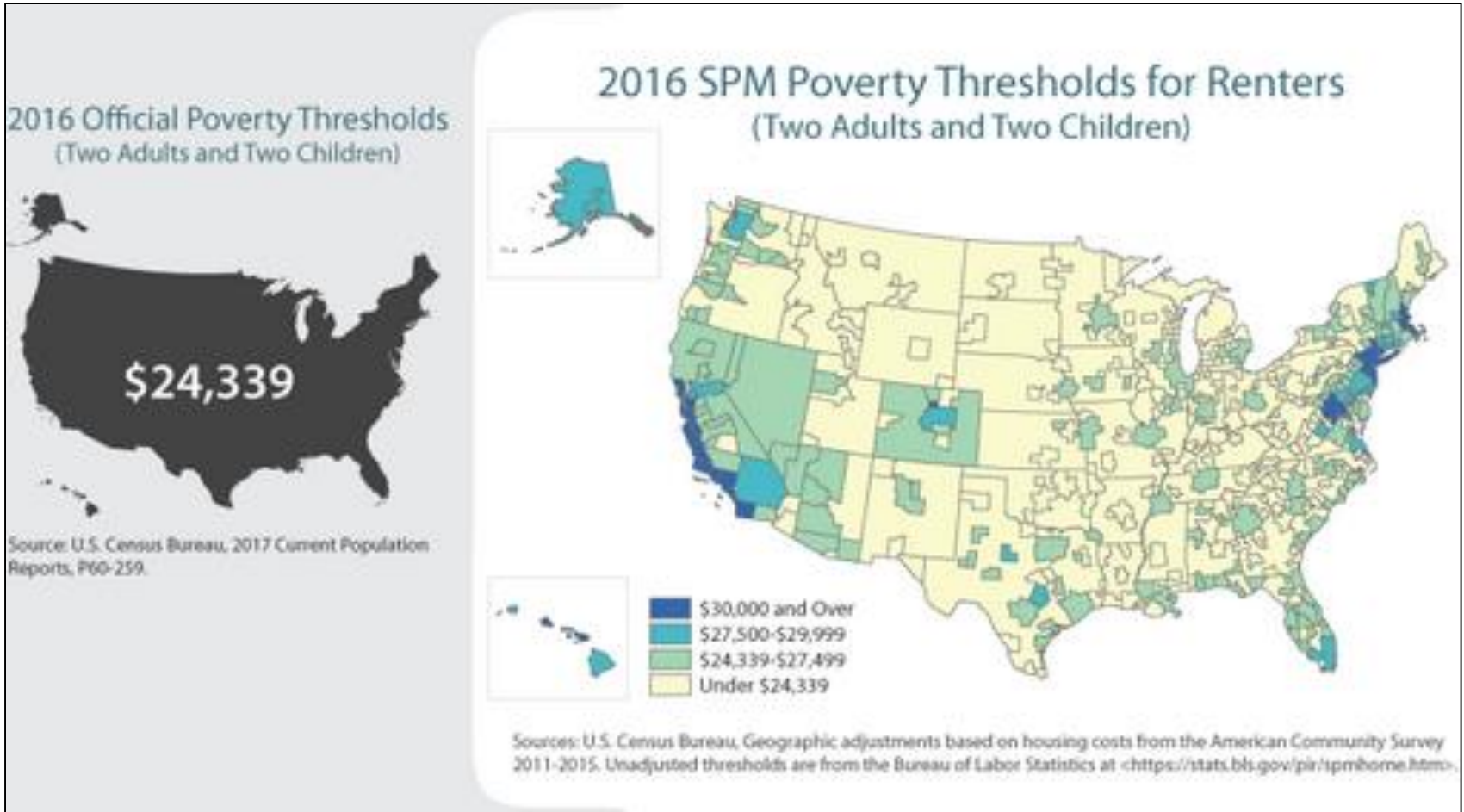
- The SPM will not replace the official poverty measure
- Will not be used for resource allocation or program eligibility
- Census Bureau and BLS responsible for improving and updating the measure



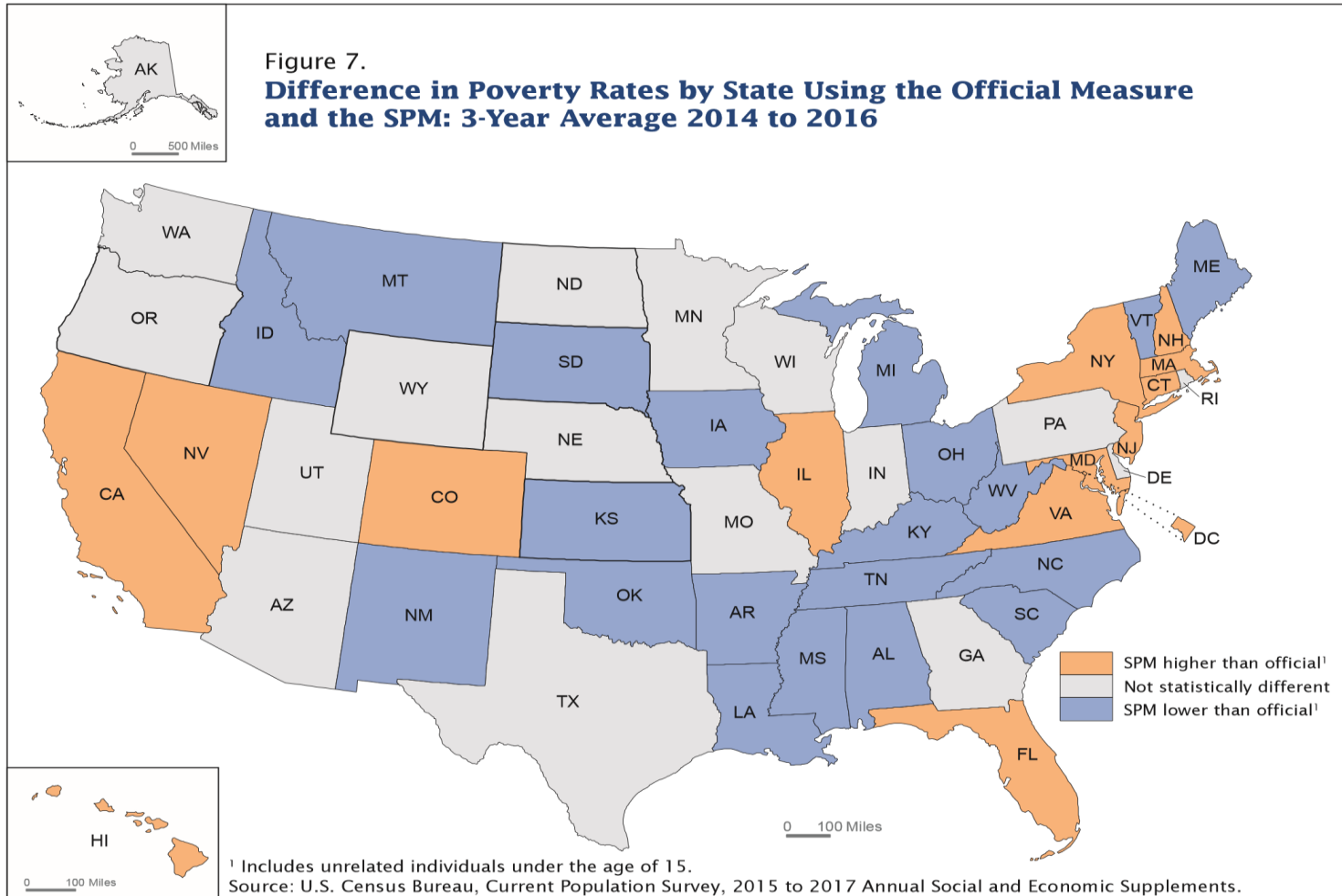
SPM – Poverty Measure Concepts

	Official	SPM
Measurement units	Family only	OPM Family plus unmarried partners, unrelated children and foster children
Poverty Thresholds	3 times minimally adequate food diet in 1960	30 th -36 th percentile of expenditure on food, clothing, shelter and utilities (+20%)
Threshold adjustments	Vary by family size, composition, and age of householder	Geographic adjustments for differences in housing costs and equivalence scale for family size and composition, 3 separate thresholds by housing status
Updating thresholds	Consumer Price Index (CPI-U)	5-year moving average of expenditures
Resource measure	Gross cash income before tax	Cash income, PLUS: in-kind benefits (SNAP, LIHEAP, WIC, housing subsidies) MINUS: Taxes, child support paid, work expenses (including child care), medical out-of-pocket expenses

SPM - Thresholds

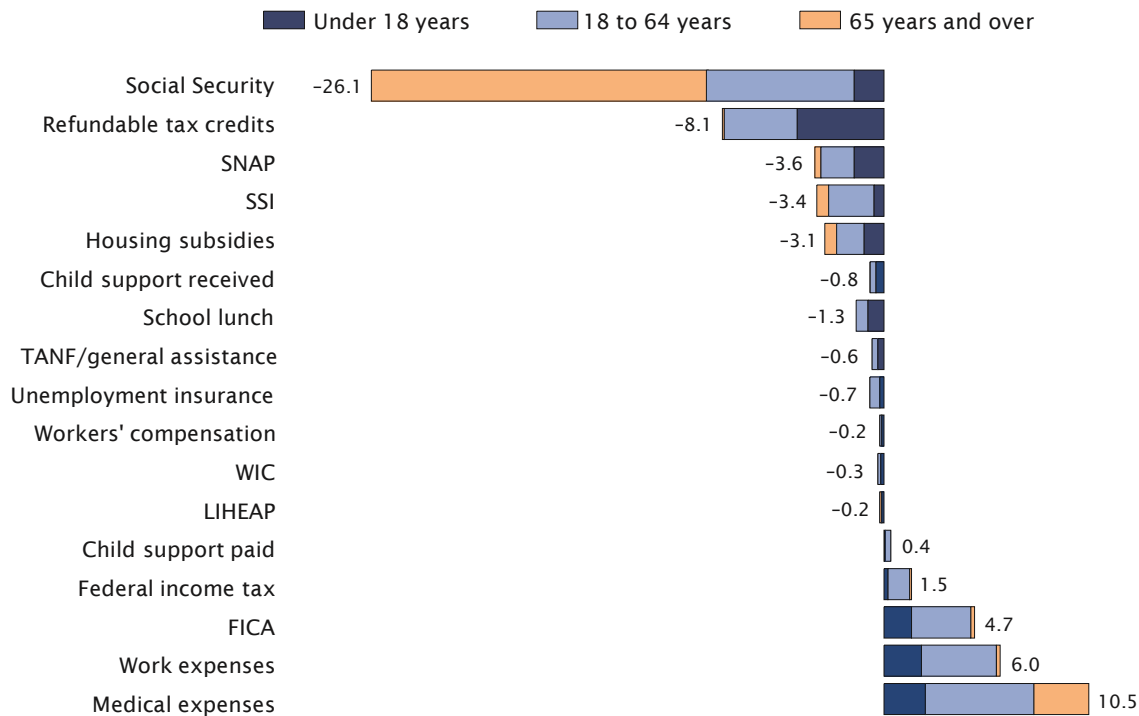


Difference in Poverty Rates by State: SPM - CPS



Effects of each Element on Poverty Measure - SPM

Figure 8.
Change in Number of People in Poverty After Including Each Element: 2016
(In millions)



Note: For information on confidentiality protection, sampling error, nonsampling error, and definitions, see <www2.census.gov/programs-surveys/cps/techdocs/cpsmar17.pdf>.
Source: U.S. Census Bureau, Current Population Survey, 2017 Annual Social and Economic Supplement.

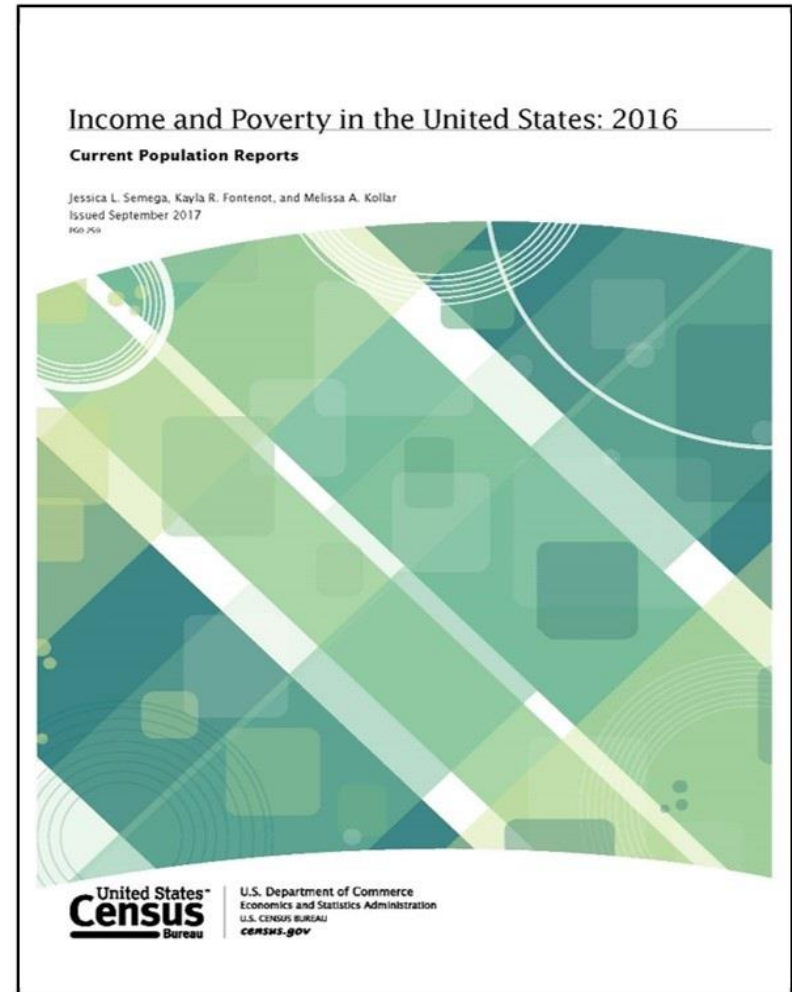
Selected Sources of Poverty Data

Selected Sources of Data

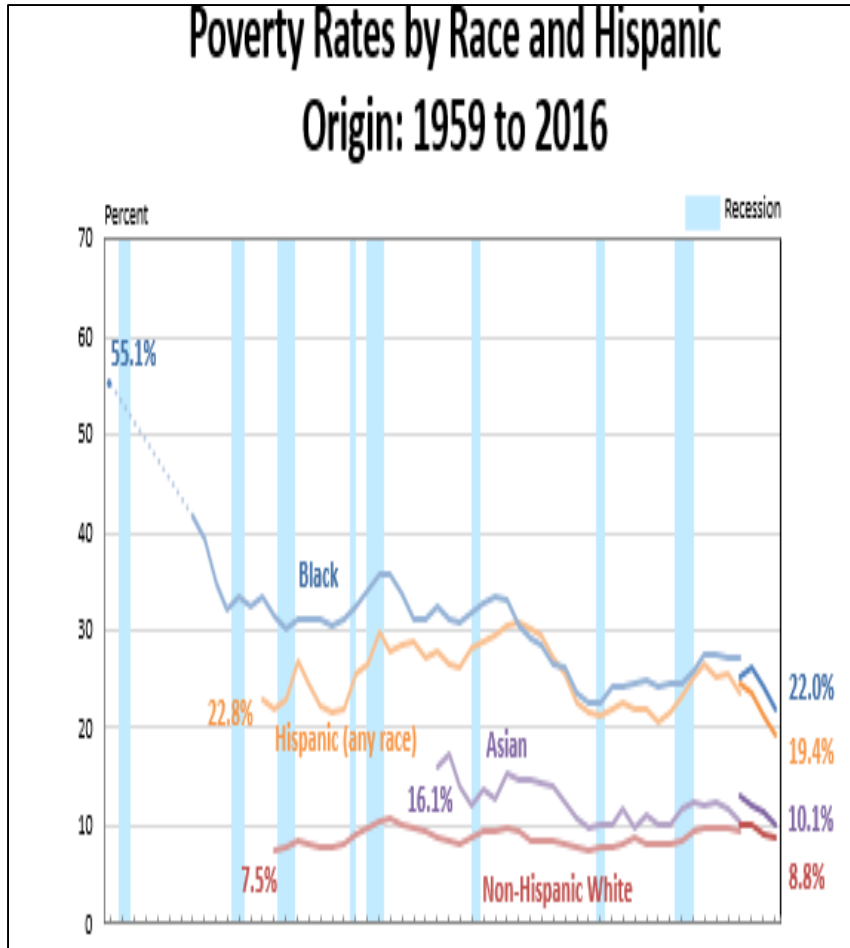
- **Current Population Survey Annual Social and Economic Supplement (CPS-ASEC)** – Source of official poverty measure.
- **Decennial Census** - 2000 Census and prior was source of demographic and socio-economic sub-national data.
- **American Community Survey (ACS)** – Current source of demographic and socio-economic sub-national data.
- **Survey of Income and Program Participation (SIPP)** – longitudinal survey.
- **Small Area Income and Poverty Estimates (SAIPE)** – model-based annual estimates of school age poverty for every school district.

Current Population Survey (CPS)

- Produce specific socioeconomic and demographic estimates for the United States and states for total population and selected subpopulations.
- With the Annual Social Economic Supplement (ASEC), provide timely estimates of income and health insurance, as well as official poverty estimates.
- Annual sample size is about 100,000 addresses.
- Telephone and personal-visit interviews for the 50 states and the District of Columbia. The CPS is a voluntary survey.
- Includes people at their usual place of residence (where they spend most of the time during the year).



CPS (Cont'd)



- CPS ASEC asks a series of 50 questions about various sources of income during the previous calendar year.
- Interviews conducted between February-April, asks about last calendar year income.
- Unrelated subfamilies are identified and poverty status is determined as a family
- Rich historical data
 - For characteristics of U.S. population – since 1959
 - For state level – since 1980

Decennial Censuses

- Census 2000 and Prior Censuses:
 - Best Measures for sub national areas
 - Very large sample
 - Conducted every ten years
 - used a mail-out/mail-back questionnaire and only personal-visit follow-up using paper questionnaires.
 - “short” form basic demographic and housing information, such as age, sex, race, housing.
 - “long” form collected the same information for selected sample as the short form but also collected more in-depth information such as income, education, and language spoken at home
- 2010 Census and future – provide only basic short form information.

American Community Survey (ACS)

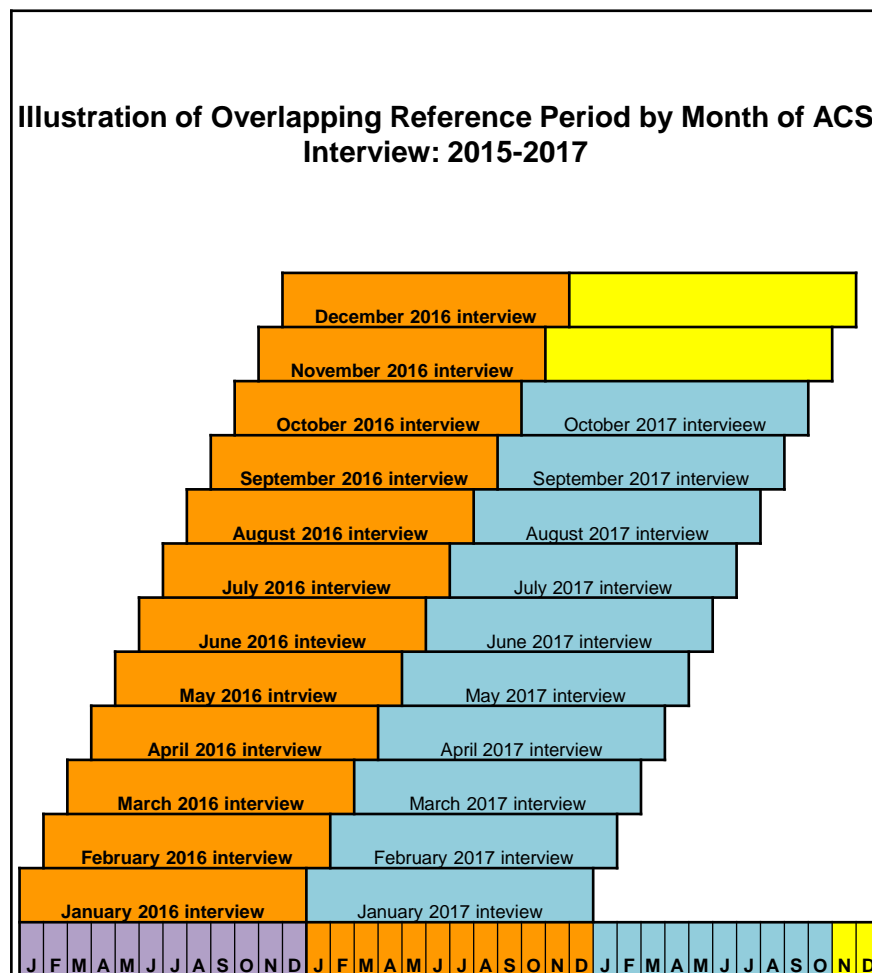
- The American Community Survey (ACS), is a nationwide survey that collects essentially the same information on people and housing that was collected on the short and the long-form questionnaires used in Census 2000 and earlier censuses.
- The ACS is a critical element in the Census Bureau's decennial program.
 - 2010 Census focused on counting the U.S. population
 - Same “short form” questions on the ACS
- The ACS is a continuous survey,
 - Each month a sample of about 290,000 housing unit addresses receive a questionnaire.
 - Nearly, 3.5 million addresses are surveyed each year.

ACS—Con.

- Four modes of data collection methods are used:
 - Online (internet)
 - Mail out/mail back
 - Telephone (CATI) (for those with telephone numbers)
 - Personal visit (CAPI) (for those sampled non responding addresses)
- Includes resident population of the United States living in housing units and group quarters – (Puerto Rico Community Survey)
- Counts current residents at the selected address using the “Two month” rule, whether or not they have ‘usual residence elsewhere’

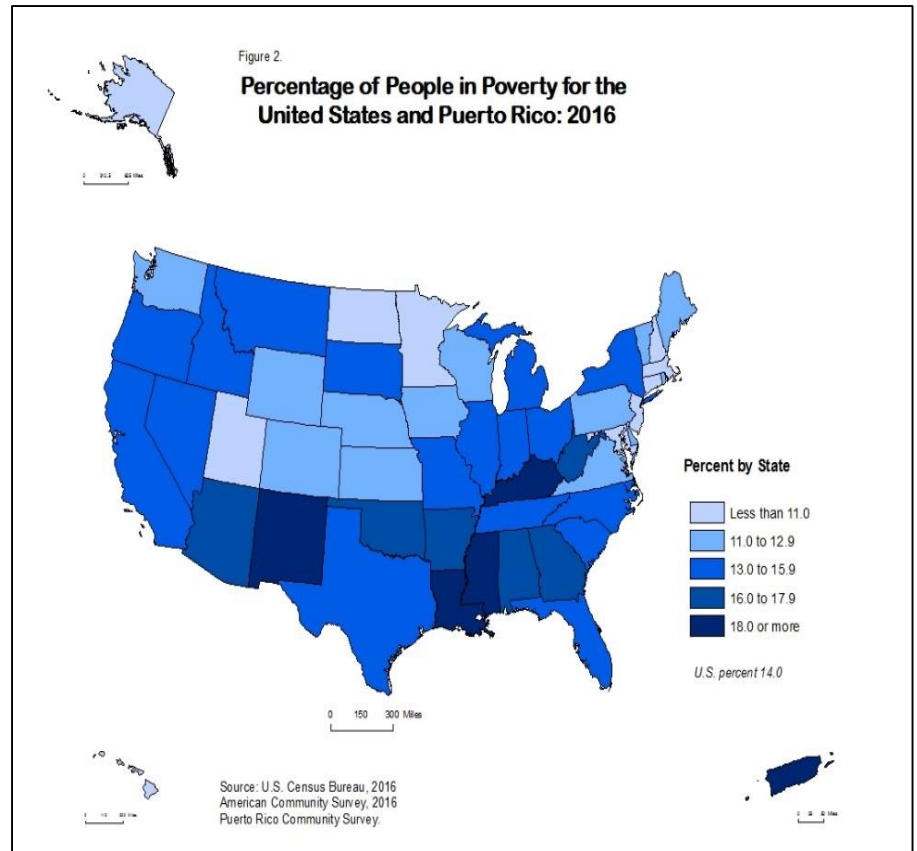
ACS—Con.

- Reference period is the 12-month period prior to the interview month.
- Collects data on various social, economic, housing, and demographic characteristics
- Asks about money income using a series of eight questions during the past 12 months



ACS—Con. - Estimates

- ACS estimates are period estimates, describing the average characteristics over a specified period
- 1-year and 5-year estimates released for geographic areas that meet specific population thresholds
- The 5-year estimates provides data for all geographic areas while



ACS—Con. – When to use the Various ACS Estimates

1-year estimates	1-year supplemental estimates	5-year estimates
12 months of collected data	12 months of collected data	60 months of collected data
Data for areas with populations of 65,000+	Data for areas with populations of 20,000+	Data for all areas
Smallest sample size	Smallest sample size	Largest sample size
Less reliable than 3-year or 5-year	Less reliable than 5-year	Most reliable
Most current data	Most current data	Least current
Annually released: 2005-present	Annually released: 2014-present	Annually released: 2009-present
Best used when	Best used when	Best used when
Currency is more important than precision	Currency is more important than precision	Precision is more important than currency
Analyzing large populations	Analyzing smaller populations	Analyzing very small populations
	Examining smaller geographies because the standard 1-year estimates are not available	Examining tracts and other smaller geographies because 1-year estimates are not available
*ACS 3-year estimates have been discontinued since 2011-2013.		

ACS Data Products

Key ACS Data Products	
Data Product	Description
Data profiles	Provide broad social, economic, housing, and demographic profiles.
Narrative profiles	Summarize the information in the data profiles using concise, nontechnical text.
Selected population profiles	Provide broad social, economic, and housing profiles for a large number of race, ethnic, ancestry, and country/region of birth groups.
Ranking tables	Provide state rankings of estimates across 86 key variables.
Subject tables	Similar to data profiles but include more detailed ACS data, classified by subject.
Detailed tables	Provide access to the most detailed ACS data and crosstabulations of ACS variables.
Geographic comparison tables	Compare geographic areas other than states (e.g., counties or congressional districts) for key variables.
Thematic maps	Interactive, online maps that can be used to display ACS data.
Custom tables	Allow the user to extract specific rows of data from the ACS detailed tables.
Summary files	Provide access to the detailed tables through a series of comma-delimited text files on the Census Bureau's FTP site <www2.census.gov>.
Public Use Microdata Sample files	Provide access to ACS microdata for data users with SAS and SPSS software experience

ACS Reports

Poverty: 2015 and 2016

American Community Survey Briefs

By Alemayehu Bishaw and Craig Benson

Issued September 2017

ACSBR/16-01

INTRODUCTION

Planners and policymakers use poverty estimates as key indicators to evaluate trends and current economic conditions within communities and to make comparisons across demographic groups. Federal and state governments often use these estimates to allocate funds to local communities. Government agencies and local organizations regularly use these estimates to identify the number of individuals and families eligible for various programs.

This brief uses the 2015 and 2016 American Community Surveys (ACS) 1-year estimates to analyze poverty rates for 2016 as well as the changes in poverty from 2015 for the nation, states, and the

Changes in Areas With Concentrated Poverty: 2000 to 2010¹

American Community Survey Reports

By Alemayehu Bishaw

Issued June 2014

ACS-27

INTRODUCTION¹

This report largely compares Census 2000 poverty estimates with those based on the 2008–2012 5-year American Community Survey (ACS). As 2010 represents the midpoint of this period, for convenience the remainder of this report refers to these 2008–2012 ACS poverty statistics as 2010 estimates.

In 2010, approximately 14.9 percent of the total U.S. population lived in poverty. However, poverty is not distributed evenly across neighborhoods. There are neighborhoods in every state that have higher than

poverty in the 1990s, the concentration of poverty has surged once again since 2000. This report found that while concentrated poverty has returned to—and in some ways exceeded—the previous peak level of 1990, there are substantial differences in how concentrated poverty is manifested. In particular, the authors found that the residents of high poverty neighborhoods are more demographically diverse than in the past.²

Various researchers have found that living in communities with a large concentration of people in poverty adds burdens to low-income families. Problems associated with living in poverty areas, such as, higher crime

When to Use ACS - CPS Data

- In general national level estimates from both surveys are consistent and comparable, most of the differences are not statistically significant
- It is recommended to use the CPS estimates at the national level
- State level estimates from both surveys generally are similar and no systematic differences observed. For the CPS ASEC we recommend using multi-year averages to look at states.
- For use at state and lower geographic levels ACS estimates are recommended

Survey of Income and Program Participation (SIPP)

- A longitudinal survey designed to track changes over 3-5 years for the same households
- Data from the 2008 panel cover calendar years 2008-2013. The 2014 panel cover 2013 thru 2016. New panel will start in 2018.
- Interview is conducted to same household every 4 months
- SIPP produces monthly estimates of poverty
- SIPP enables us to measure poverty duration and movements into and out of poverty rather than just getting a snapshot of poverty at one point in time

Monthly and Average Monthly Poverty Rates by Selected Demographic Characteristics: 2013
Household Economic Studies
Current Population Reports
By Kayla Fontenot, Lewis H. Warren, and Abinash Mohanty
Issued March 2017
P2088-1-15

INTRODUCTION
Poverty rates are key economic indicators often used by policymakers to evaluate economic well-being and make comparisons across sectors of the population. This report presents monthly and average monthly poverty rates for the United States in 2013 based on data collected from the 2014 Panel of the Survey of Income and Program Participation (SIPP). In addition, it examines how monthly and average monthly poverty rates vary across demographic groups. The SIPP is a longitudinal survey which provides monthly data on family composition and economic well-being. Compared to other surveys such as the Current Population Survey (CPS) and the American Community Survey (ACS) which provide annual measures of poverty, the SIPP allows for the examination of poverty on a monthly basis. This facilitates the analysis of changes in poverty rates over time, as well as the duration of poverty spells. Poverty statistics presented in this report adhere to the standards specified by the Office of Management and Budget's Statistical Policy Directive 14. The U.S. Census Bureau uses a set of money income thresholds that vary by family size and composition to determine who is in poverty. If a family's total pretax cash income is less than that family's threshold in a given month, then that family and every individual in it are considered to be in poverty. The poverty thresholds are updated annually.

WHAT IS SIPP?
The Survey of Income and Program Participation (SIPP) is a nationally representative panel survey administered by the U.S. Census Bureau that collects information on the short-term dynamics of employment, income, household composition, and eligibility and participation in government assistance programs. It is a leading source of information on specific topics related to economic well-being, family dynamics, education, wealth and assets, health insurance, child care, and food security. Each SIPP panel follows individuals for several years, providing monthly data that measure changes in household and family composition and economic circumstances over time. For more information, please visit the SIPP Web site at www.census.gov/sipp.

POVERTY MEASURES USED IN THIS REPORT

Monthly Poverty Rate	Percent in poverty in a given month using monthly income and a monthly threshold.
Average Monthly Poverty Rate	Percent in poverty using monthly income and a monthly threshold over a given reference period—in this case, the percentage of individuals with monthly income below their monthly poverty thresholds calculated using all months of the calendar year.

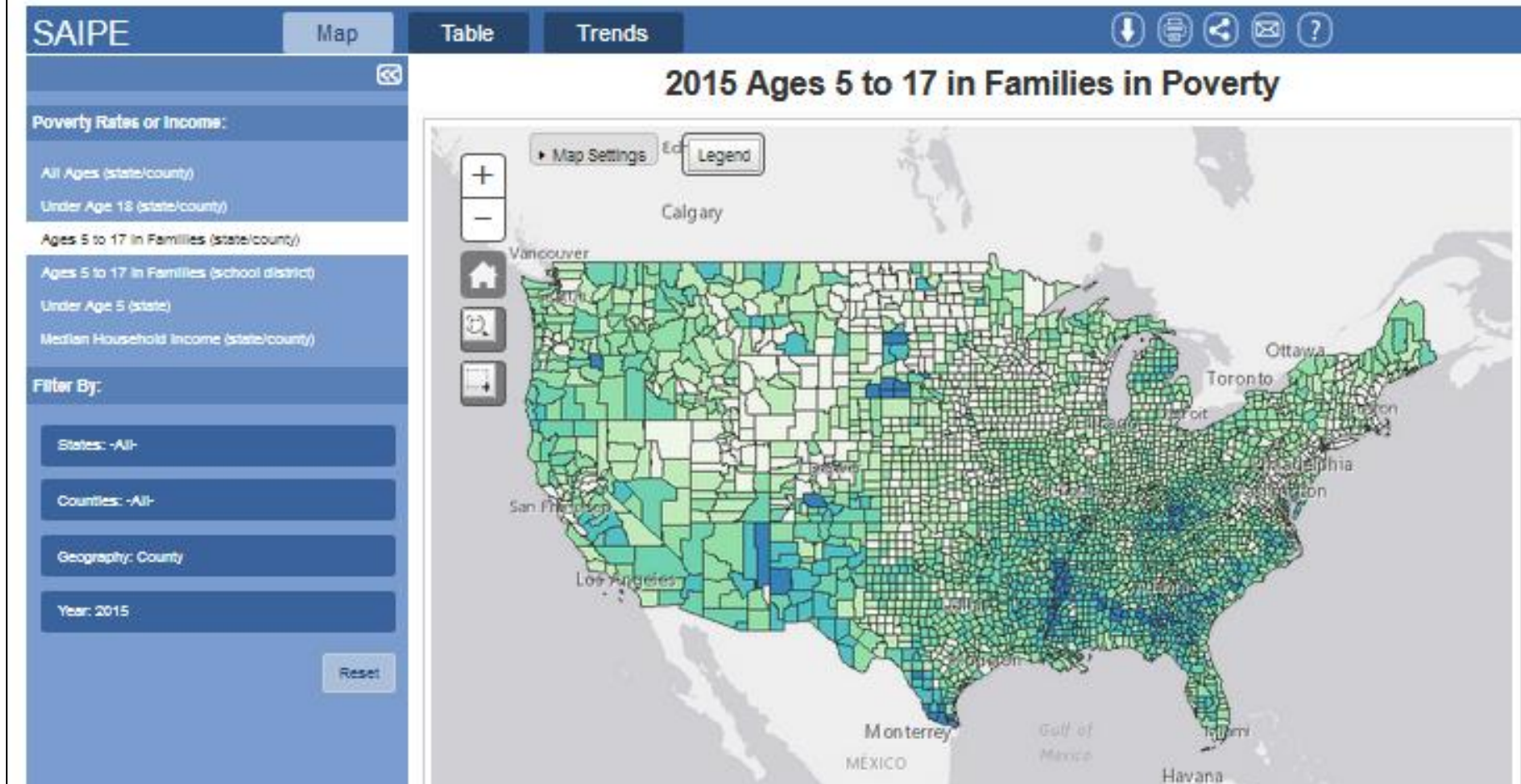
United States[™] Census Bureau | U.S. Department of Commerce
Economics and Statistics Administration
U.S. CENSUS BUREAU
census.gov

Small Area Income and Poverty Estimates (SAIPE)

- SAIPE estimates combine ACS data with administrative and other data
- SAIPE produces single-year estimates of median household income and poverty for states and all counties, as well as population and poverty estimates for school districts.
- SAIPE estimates generally have lower variances.

Small Area Income and Poverty Estimates (SAIPE)—Con.

Small Area Income and Poverty Estimates



How to Find Poverty Data on Census Webpage

Summary of Recommendations at Various Geographic Level

Geographic Level	Income/Poverty Rate	Cross-Sectional Estimates		Longitudinal Estimates
		Detailed Characteristics	Year-to-Year Change	
United States	CPS ASEC	CPS ASEC/ ACS 1-year estimates for detailed race groups	CPS ASEC	SIPP
States	ACS 1-year estimates	ACS 1-year estimates	ACS 1-year estimates/ CPS ASEC 2-year averages ¹	SIPP for select states ²
Substate (areas with populations of 65,000 or more)	ACS 1-year estimates/ SAIPE for counties and school districts	ACS 1-year estimates	ACS 1-year estimates / SAIPE for counties and school districts	None
Substate (areas with populations less than 20,000)	SAIPE for counties and school districts/ ACS using 5-year period estimates for all other geographic entities/ Census 2000	ACS 5-year estimates/ Census 2000	SAIPE for counties and school districts/ ACS using 5-year period estimates for all other geographic entities ³	None
State-to-Nation comparison	CPS ASEC	CPS ASEC	CPS ASEC	SIPP for select states ²

How to Find ACS Poverty data on AFF

The screenshot shows the American Factfinder search page. At the top, there is a navigation bar with 'MAIN', 'COMMUNITY FACTS', 'GUIDED SEARCH', 'ADVANCED SEARCH', and 'DOWNLOAD CENTER'. Below this is a search instruction: 'Search - Use the options on the left (topics, geographies, ...) to narrow your search results'. On the left side, there are several selection boxes: 'Your Selections' (empty), 'Topics (age, income, year, dataset, ...)', 'Geographies (states, counties, places, ...)', 'Race and Ethnic Groups (race, ancestry, tribe)', 'Industry Codes (NAICS industry, ...)', and 'EEO Occupation Codes (executives, analysts, ...)'. In the center, there is a search form with two input fields: 'topic or table name' and 'state, county or place (optional)', a 'GO' button, and a help icon. Below the form are radio buttons for 'topics', 'race/ancestry', 'industries', and 'occupations'. The 'topics' radio button is selected. Below the form, there is a section for selecting from 'Topics, Race and Ethnic Groups, Industry Codes, EEO Occupation Codes'. Three numbered steps are overlaid on the page: Step 1: 'Enter search terms and an optional geography and click GO'. Step 2: 'Next, select Geographies (states, counties, cities, towns, etc.)'. Step 3: 'Select one or more Search Results and click View'.

- From main Census Web page (www.census.gov):
 - Click on ‘**Data**’ then ‘**Data Tools and Apps**’
 - Select ‘**The American Factfinder**’
- From The American Factfinder page:
 - Click on ‘**Topics**’ to choose the subject
 - Click on ‘**geography**’ to choose geographic area then click “ADD”
 - Make sure your selection is showing in the “selection box”
 - Close geographic selection screen
 - Select ‘the table’ and click “VIEW”
 - Make sure to choose the correct dataset (1-year, 3-year, 5-year estimates)

How to Find CPS Data

From the main Census Bureau page (www.census.gov)

- Sequentially click on - 'Topics' , 'Income & Poverty' and 'Poverty' or
- Go directly to the poverty page using (www.census.gov/hhes/www/poverty/)
- From the poverty page click on 'Data' and choose 'Current Population Survey' Annual Social and Economic Supplement (CPS ASEC)
 - Click on Report to see the latest Income and Poverty Report or
 - Click on Detailed Tables or Historical Tables to choose a table or
 - Click on 'Generate your own tables on-line using CPS table Creator'

Poverty

About this Topic
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Guidance for Data Users
Library
News & Updates

The Census Bureau provides poverty data from several household surveys and programs. Here you can find poverty estimates, learn about these surveys and programs, and get guidance on how to choose the right estimate for your needs.

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**2 Adults
2 Children
\$24,339**
Poverty Thresholds

Poverty Data Tools

**Poverty in the US
12.7%**
2016 Official Poverty Report

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CPS Table Creator

www.census.gov/cps/data/cpstablecreator.html

CPS Table Creator

Table Criteria:

Data Options

Get Count of: [Help](#)

Number of Years: Latest Year:

One Table Showing Multi-Year Averages

Separate Table For Each Year

Census 2010 Weights

[Hide Panel](#)

Filters/Subjects: [Help](#)

All States All Sexes All Races All Origins All Nationalities Full/Part Time

All Worker Sta


The CPS Table Creator gives you the ability to create customized tables from the Current Population Survey's Annual Social and Economic Supplement.

- Complete the form to the left and press the "Get Table" button at the top or bottom of the form to create your table.
- To create a table, you must make one or more selections in the Define Your Table section. For all other sections, you may use the default selections or enter alternate selections to customize the table to meet your needs.
- For help in getting started, see the [detailed examples](#) of completing the form to create a table.

Disclaimer:

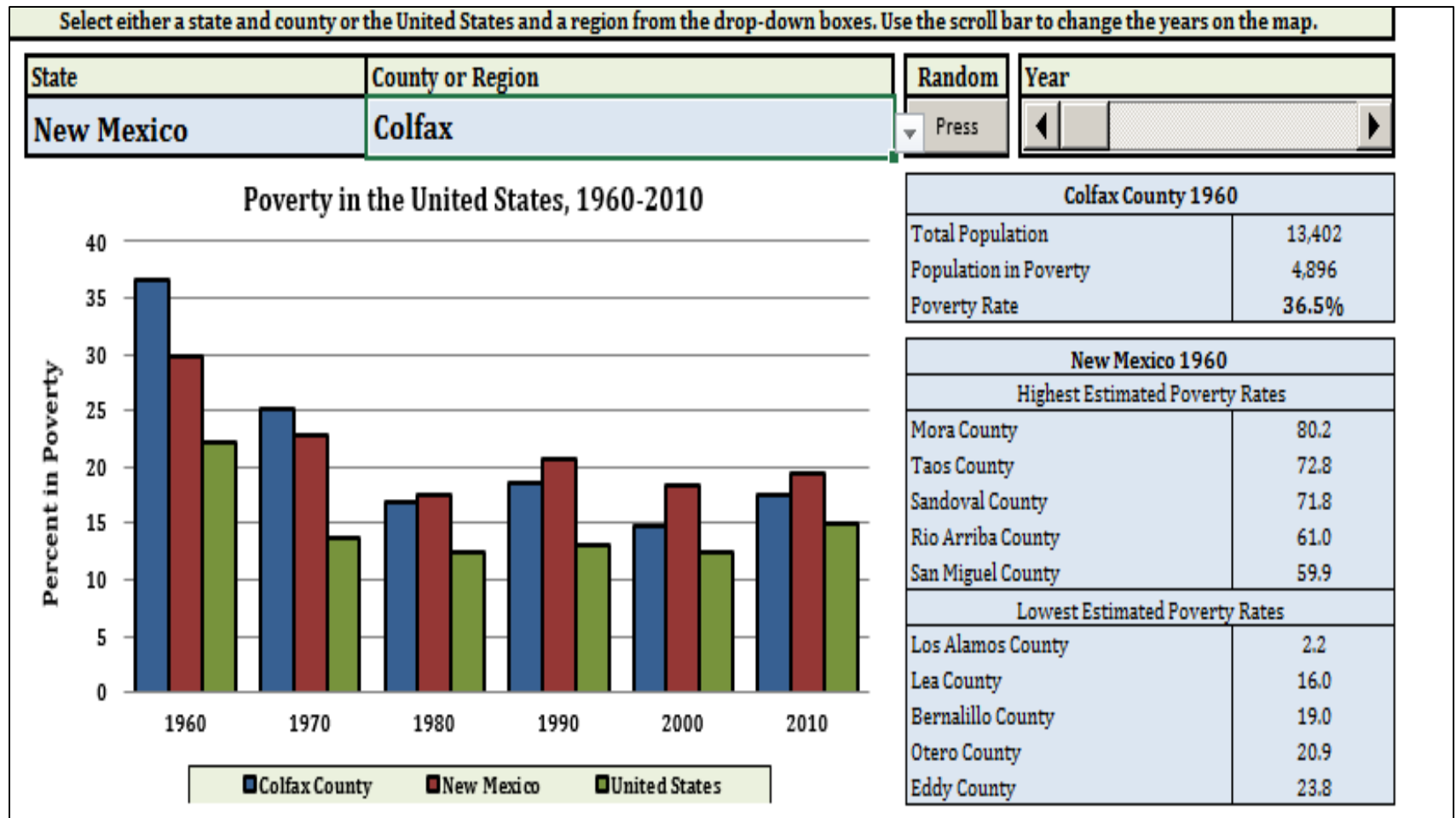
While tabulations may be conceptually the same as published estimates, in many cases they will not exactly match published estimates because the Table Creator uses the CPS public use file. The CPS public use file lacks some of the detailed income information, topcodes several categories of income, and suppresses some geographic identifiers in order to protect survey confidentiality.

* This tool is best viewed with normal font settings and in the Firefox web browser.



How to Find Decennial Data

www.census.gov/library/visualizations/time-series/demo/census-poverty-tool.html



SPM Data

www.census.gov/topics/income-poverty/supplemental-poverty-measure.html

Supplemental Poverty Measure

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An Interagency Technical Working Group on Developing a Supplemental Poverty Measure was formed in 2009 and charged with developing a set of initial starting points to permit the U.S. Census Bureau, in cooperation with the Bureau of Labor Statistics...

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The Supplemental Poverty Measure: 2016

September 21, 2017

This report describes research on the Supplemental Poverty Measure (SPM).

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Small Area Income and Poverty Estimates (SAIPE) Program

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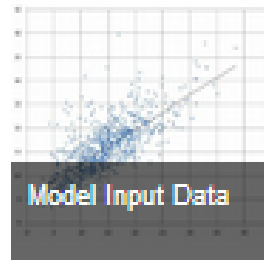
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The U.S. Census Bureau's Small Area Income and Poverty Estimates program produces single-year estimates of income and poverty for all U.S. states and counties as well as estimates of school-age children in poverty for all 13,000+ school districts.

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