

HOUSEHOLD BUDGET SURVEY

METHODOLOGICAL EXPLANATIONS

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Sources and methods of data collection

Data are collected with the Household Budget Survey, which was between 1983 and 1997 conducted according to the unified methodology and with the same questionnaires as regards the contents. In 1997 there were some changes in survey contents and implementation. The survey was harmonised with Eurostat's recommendations and became a continuous one. By combining data of three consecutive years we obtain more accurate estimates. Data from three years are calculated to the middle year which is used as the reference year for interpretation of results. We no longer use the balance approach but the concept of expenditure classified by the COICOP-HBS (Classification of Individual Consumption by Purpose). Comparison of results with previous years is only possible at the level of current income and consumption expenditure, since certain questions are no longer part of the survey (e.g. on decrease of savings, paying back consumer credits and investment loans, etc.). Therefore, there is no balance between available assets and allocated assets. This is a sample survey. The sample stratification was made with regard to 12 statistical regions and six types of settlements. In bigger settlements (with over 10,000 inhabitants) we used simple random sampling and in smaller settlements sampling of clusters with four persons who define the household. First, enumeration areas were selected (taking into account their size) for the whole year and then for each quarter four persons in each enumeration area were selected. In bigger settlements only persons were selected with simple random sampling for each quarter. We do not use the method of substitution, i.e. of selecting substitute households that would replace the ones that did not co-operate; instead we enlarge the sample according to the response rate from previous years. Data on available and allocated assets of households are given by the household members directly to the interviewers authorised by the Statistical Office of the Republic of Slovenia. We use the method of personal interviewing on the basis of the questionnaire and diaries, which household members fill in with daily expenditure and bought quantities. Surveying of households is equally distributed throughout the year and each household cooperates in the survey for 14 days.

Coverage

Results, published for a certain year, are based on the combined sample of three consecutive years and data of the Survey are calculated to the middle year which is used as the reference year. The survey does not cover collective households such as boarding schools, nursing homes for children, old people's homes, hospitals, homes for pupils, student hostels, etc.

Definitions and explanations

Households as observation units are either communities of persons who live together, eat together and spend their income together, or single persons who live and eat on their own and independently use the means.

Available money assets within a household are available financial assets that a household had at its disposal in the survey period.

Money income of a household covers financial income that was received by household members in 12 months:

- income from employment (wages and salaries, income from work under contract and other income of employed

- members, including copyright income and payment via a student employment office);
- income from self-employment (income of entrepreneur, from agricultural holding and from activity);
 - social income (pensions with supplements, social benefits, disability allowances, scholarships, unemployment benefits);
 - family allowances (child allowance, maternity leave compensation, parental allowance, child care assistance);
 - property income (income from letting rooms or dwellings, income from patents, licences and other rights, dividends, interest);
 - money gifts and transfers (alimony, maintenance allowance, financial gifts).

The available money assets cover also:

- receipts from sale (sale of intangible and tangible goods, sale of securities);
- other receipts (winnings at gambling, compensation for nationalised or dispossessed property, inheritance and legacy, income from life insurance, from insurance companies).

Allocated assets cover consumption expenditure, expenditure for a dwelling or house (purchase of a dwelling, house, major works and renovations) and other expenditure. Other expenditure covers taxes and self-imposed contributions, savings, money transfers and gifts, life insurance, voluntary pension and disability insurance, fines and indemnity money. Allocated assets include value of purchased goods and services, irrespective of whether they were paid in cash or bought on credit. Covered is all expenditure of household members, irrespective of whether used for their personal needs or for gifts to other persons.

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