

METHODOLOGY OF HBS SLOVENIA

Frequency: continuous (annual) survey since 1997.

Last reference year: 1997.

Sample size: gross 1666 households and net 1276

Sample design: random probability sample. For larger towns (more than 10.000 inhabitants) one stage sample is used (simple random). For other areas the sample is selected in two stages (the clusters of 4 households are selected).

Stratification: Stratification is made according to the region, the size of a settlement and proportion of farmers in smaller settlements. In smaller settlements the sample is selected in two stages. At the first stage clusters are selected with probability proportional to their size. At the second stage in each cluster 4 adults are selected at random from the Central Population Register. The households are determined by living in the address of the selected individual. In bigger settlements (more than 10.000 inhabitants) just simple random sampling is used.

Sample representativeness: Survey is representative at the national level. Foreigners and homeless are not included. Foreigners temporarily living in Slovenia can only be included in the sample if they live in the same household as a Slovenian resident.

Sampling frame: Central Population Register.

Unit of measurement: The ultimate sampling unit is an adult person. The enumeration unit is household and its members.

Response rate and its calculation method:

Response rate was 81,7%.

response rate = response/eligible units

Substitution: not allowed. Enlarging of the sample according to the response rate from previous years is used instead.

MAIN CONCEPTS AND DEFINITIONS

Coverage: whole country, all private households. The survey does not cover collective households, foreigners temporarily living in Slovenia as well as the homeless.

Definition of the household: household as observation unit is community of persons who live together and share their income for covering the basic costs of living (food, accommodation, etc.). A member of a household can however temporarily live apart because of a work, schooling or other reasons. A household is also a person who lives alone and does not have its own household elsewhere. She/he can live in the same dwelling with other persons but does not share income for covering the costs of living.

Reference person: The reference person in the household is the person with the highest income.

Child-adult definition: Diaries are filled in by persons 14 or more years old. Some questions in survey relates just for children 15 or more years old. Other definitions can be used for different analytical purposes.

SURVEY CONTENT

Consumption expenditure approach: The survey is close to consumption approach:

- 1) consumption of household's own production is recorded for all households and evaluated at retail prices by the statistical office
- 2) Benefits in kind like gas, electricity, water, telephone, free meals and car insurance are measured
- 3) Hire-purchases are valued at cash price at a moment of taking possession.

Individual diary: We have two kinds of diaries - for the main purchaser (A) and for other members 14 or more years old (B). The recording is taking place for 14 days, starting one day after the first visit of the interviewer. B diary is voluntary and it is not kept by each household member. It is meant for household members which usually make their own purchases. The structure of the B-diary is the same and it is intended for recording the same information as the diary for the main purchaser. The difference is that B-diary is a little shorter due to shorter tables and we remind household only on each page of A - diary that they should record expenditure for other members which do not have their own diary and that each expenditure should be recorded just once.

Household diary: We have two kinds of diaries - for the main purchaser (A) and for other members 14 or more years old (B). Household receives one A diary (for the main purchaser) to record the daily expenditures for 14 days, starting one day after the first visit of the interviewer. Diaries are open-ended. Each day is on separate page and includes two tables. For the first table households are asked to record the purchased item, expenditure and purchased quantities. For food they should record if it is fresh, frozen or conserved. There are also columns for marking if the item has been bought abroad and column for remarks. In the second table they should record the food and beverages eaten in restaurants and canteens. We remind them on each page of A - diary that they should record expenditure for other members

which do not have the diary and that each expenditure should be recorded just once. Both diaries have also a special place to mark if they did not have any expenditures that day. At the end of the diary the interviewer puts down the reasons for empty pages for each day.

Interview(s): We have one questionnaire which is divided into two parts. The first part is filled in during the first visit before the recording period. The interviewer hands out the diaries and starts with the first part of the interview which covers information on household members (gender, marital status, educational level, work), housing conditions and housing costs, purchases of a dwelling or house and availability of durables. The second part of the interview takes place after 14 days at the second visit. It includes information on expenditures not covered by the diary (purchasing of a car, motorcycle, boat, major durables, furniture, clothing and footwear, domestic help, health and education expenditure, insurance, financial transfers and financial situation, some taxes and other expenditure), holidays, income and consumption of own production. Half of our interviewers use CAPI for collecting information. If the household members wish they could answer both parts of the questionnaire at the first visit.

Variables:

PRIMARY VARIABLES:

Expenditure according to COICOP-HBS

Income (net) from employment, selfemployment, property, pension and social benefits, private transfers and other receipts

year of the survey, region, weighting

sex, age, marital status and educational level completed, level of studies underway

current activity, profession, employment status

occupancy status, type of housing, number of rooms, floor space, telephone, garage, secondary residence

automobile (number), TV, video, computer, washing mashine, dishwasher, refrigerator

DERIVED VARIABLES

size, equivalent size (OECD, OECDmodified)

children up to 13 years, children between 14 and 16 years, children up to 18 years old, older children, adult children, adults not living as a couple, adults living as a couple

type of household, aggregated type of household, socioeconomic category, aggregated socioeconomic category, economic situation, number of actively employed

Nomenclature: COICOP-HBS (4-digit-level) is used.

Classification(s): for education: own classification harmonised to ISCED, for occupation: own classification harmonised to ISCO-88.

Reference period: 1997, length of retrospective period: 12 months, 6 months, 3 months; length of detailed recording period: 14 days. We have different reference periods:

- last payment (housing costs)
- monthly payment (rent, kindergarten)
- last 12 months (major durables and larger expenditure, household income, some social receipts)
- last three months (clothing and footwear)

- usual receipt (salary)
- last receipt (pension, some social receipts)
- last 6 months (medical expenses, holidays)

TREATMENT OF DATA

Weighting:

All selected households do not have the same probability of the selection. Households with more adult persons have a higher probability of selection. We solve this problem with weighting (inversely proportional to probability of selection). We also use weights to take into account survey non-response (inversely proportional to the response rate by strata). Sample weights are calculated by strata. In order to achieve representativity of the sample we use auxiliary data (Census'91, CRP, LFS which is larger survey) to do post-stratification according to region, household size, age and sex. Data are also weighted depending on reference period, source (questionnaire, diary) and type of a variable. The final weight is a product of all these weights.

Production time: The survey results after cumulating samples for three years will be available 6-8 months after the end of the data collection for the last year.

Use of HBS data for calculations of CPI: HBS data are used for up-dating the weights for constructing the Consumer Price Index.

Use of HBS data for calculations of SNA: The survey sample is grossed up in the weighting procedure using information from Central Population Register, Census'91 and Labour Force Survey.

Types of dissemination: paper and electronic (via Internet) publications. Results are published in publications First Release, Statistical Yearbook, Results of the Survey for HBS and Slovenia in Figures. Access to micro-data: available (only deindividualised for research purposes).

Planned changes for the survey: none