REPUBLIC OF SLOVENIA
STATISTICAL OFFICE

Alja Weindorfer

HOUSEHOLD BUDGET SURVEY

This methodological explanation relates to the data releases:

Household Budget Survey, Slovenia, multiannually (First Release)

Household Budget Survey, Slovenia, multiannually (Electronic Release)

October 2023

Content

1   PURPOSE

The purpose of the Household Budget Survey (HBS) data is to become familiar with the level and structure of personal consumption in households or by individual socio-economic categories.

The key variables are:

- Average annual allocated assets per household
- Average annual allocated assets per household member
- Structure of average annual allocated assets of households
- Average annual quantity of food and beverages consumed per household member
- Share of households with certain consumer durables

2   LEGAL FRAMEWORK

- [Annual Programme of Statistical Surveys (LPSR) (only in Slovene)](#)
- [National Statistics Act (OJ RS, No. 45/95 and 9/01)](#)

3   UNIT DESCRIBED BY THE PUBLISHED DATA

Observation units are selected single person or multi person households. A household is any family or other group of persons living together and sharing their income to cover the basic costs of living (accommodation, food, other consumer goods, etc.), regardless of whether all members live all the time at the place where the household is located, or some of them live for a longer time at another place in Slovenia or abroad due to employment, schooling, or any other reasons. A person who lives alone at the place of survey and has no other household at another place is also a household (single-person household). Such a person can live alone in a separate dwelling or together with other persons in the same dwelling (same room) if not sharing his/her income with such persons.

The following persons are also considered members of a household:

- Persons who are absent due to occupational commitments, but do not have a dwelling or household at another place (e.g. travelling salesmen, businessmen, etc.).
- Persons under temporary employment contracts abroad who return home each month or more frequently.
- Persons who are not family members, if they work, eat and live in the same housing community (servants and permanent workers on private agricultural holdings)
- University students or upper secondary school pupils who attend schools at another place, regardless of the time they spend outside the household (in schools and at study).

The following persons are not considered members of a household:

- Persons who eat in the household (boarders)
- University students or upper secondary school pupils who live and eat, or only live, in the surveyed household (roommates, subtenants)
- Persons who are under temporary employment contracts abroad and return home only occasionally; the money and material goods intended for the household by such persons are considered as gifts from persons outside the household
- Migrant workers who live permanently abroad
- Persons who live in institutions – collective households (boarding schools, nursing homes for children, old peoples homes, hospitals, cloisters, homes for pupils, student hostels)

Based on the statements of the persons present, and considering the definition of a household, an interviewer establishes who the members of the household are. Households are divided into different types of households, size and income classes.

4   SELECTION OF OBSERVATION UNIT

An observation unit is a selected single person or multi person household. A household is any family or other group of persons living together and sharing their income to cover the basic costs of living (accommodation, food, other consumer goods, etc.), regardless of whether all members live all the time at the place where the household is located, or some of them live for a longer time at another place in Slovenia or abroad due to employment, schooling, or of any other reasons. Also, a person is considered a household who lives alone at the place of survey and has no other household at another place (single-person household). Such a person can live alone in a separate dwelling or together with other persons in the same dwelling (same room) if not sharing his/her income with such persons.

- The following persons are also considered members of a household:
- who are absent due to occupational commitments, but do not have a dwelling or household at another place (e.g. travelling salesmen, businessmen, etc.);
- persons under temporary employment contracts abroad who return home each month or more frequently;
- who are not family members, if they work, eat and live in the same housing community (servants and permanent workers on private agricultural holdings);
- university or secondary school students who attend schools at another place, regardless of the time they spend outside the household (in schools and at study);

The following persons are not considered members of a household:

- who eat in the household (boarders);

- university or secondary school students who live and eat, or only live, in the household under survey (roommates, subtenants);
- who are under temporary employment contracts abroad and return home only occasionally; the money and material goods intended for the household by such persons are considered as gifts from persons outside the household;
- migrant workers who live permanently abroad;
- who live in institutions – collective households (boarding schools, nursing homes for children, old peoples homes, hospitals, cloisters, homes for pupils, student hostels).

Based on the statements of the persons present, and considering the definition of a household, an interviewer establishes who the members of the household are.

The Household Budget Survey is a sample survey. The sample frame is the Central Population Register (CPR). The sample stratification was made with regard to 12 statistical regions and six types of settlements. The sampling is done in two stages. In the first stage sampling units were selected (made up of one or more spatial districts). In the second stage six people were selected in each sampling unit. We do not use the method of substitution, i.e. of selecting substitute households that would replace the ones that did not co-operate. The survey does not cover collective households such as boarding schools, nursing homes for children, old peoples homes, hospitals, boarding schools, etc.

From 1997 up to 2011, we carried out surveys on small annual samples (about 1,800 households). The published data were based on a sample of three consecutive years (e.g. 2008, 2009 and 2010). These data were calculated to the middle year (2009), and this year was used as the reference year. By 2012, we changed the methodology and moved to larger samples. In 2012 the sample included 7,000 and in 2015, 2018 and 2022 7,400 households.

5   SOURCES AND METHODS OF DATA COLLECTION

Data are collected every four years. The survey was carried annually until 2011. From 2012 is carried out multiannually (2012, 2015, 2018, 2022).The next survey is planned for 2026.

Survey data are collected by the Household Budget Survey (HBS). The data in this survey are produced by:

- A personal interview based on the Household Budget Survey (HBS) questionnaire
- Diaries, in which household members record daily expenditure for 14 days
- Administrative and other databases
- Own resources: The structure of the population (DEM-PREB/ČL)

The household survey is distributed throughout the year; each household participates in the survey for 14 days. In the questionnaires, some basic data are entered for all members of the household; then the survey is completed for

members younger than 15 years. The survey is continued by posing questions to members of at least 15 years of age which refer to data on themselves, their work habits, and also travel and personal income. Questions intended for the household as a whole concern the dwelling and any eventual other accommodations of the household, motor vehicles, furnishing, household equipment and maintenance, clothing and footwear, expenses for children, education, and help to other households, and other expenses, money transfers and gifts, the financial situation of the household, the total income of the household, and own production consumed in the household. In diaries, members of the household enter all daily expenses (description of a product or service, quantity bought, and price). The main purpose of completing the diary is to cover expenses which households would not remember in such detail when completing the questionnaire (food and beverages).

Administrative and other databases: the Financial Administration (income tax), the Ministry of the Interior (CPR, Records of Households), the Ministry of Labour, Family, Social Affairs and Equal Opportunities (social and family benefits, scholarships), the Employment Service of Slovenia (compensation for unemployment), and the Surveying and Mapping Authority.

6 DEFINITIONS

Allocated monetary assets cover consumption expenditure, expenditure for a dwelling or a house (major works and renovations) and other expenditure:

- The consumption expenditure covers expenditure on food and beverages; tobacco; clothing and footwear; housing, water, electricity, gas and other fuels; furnishings, household equipment and routine household maintenance; health; transport; communication; recreation and culture; education; restaurants and hotels; miscellaneous goods and services.
- Other expenditure covers taxes and self-imposed contributions, money transfers and gifts, life insurance, voluntary pension and disability insurance, fines and indemnity money.

Allocated monetary assets include the value of purchased goods and services, irrespective of whether they were paid in cash or bought on credit. All expenditure of household members is covered, irrespective of whether used for their personal needs or for gifts to other persons.

In calculating average expenditures per household, all households are always taken into account, not just those that had particular expenditures.

Allocated assets include, in addition to allocated monetary assets, also the value of own production consumed in the household.

Available assets within a household are monetary net income that a household had at its disposal in the survey period, the value of own production and the value of income in kind.

Monetary net income of a household covers net 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)
- Gifts and transfers (alimony, maintenance allowance, financial gifts)

From 2015 we stopped publishing data on available assets of the households. Reference source for data on income is Living Conditions (EU-SILC).

The **value of own production** includes the value of crops and products from own production consumed by a household within a year (food, beverages, firewood). The value of such crops and products is calculated according to average selling prices.

Income in kind includes benefits which the households received from employment (employer covers the costs of the household for electricity, cold water, gas, telephone, radio and television subscription, registration of a vehicle, free meals, etc.), or from other sources (for example, relatives or friends pay a bill for electricity, cold water, gas, telephone, radio and television subscription, registration of a vehicle, etc., for the household).

The **quantity of food and beverages** consumed per household member is the quantities purchased (at the shop, store, market, etc.) and consumed at home. The amount of food and beverages consumed outside in restaurants, inns, cafes and the like are not taken into account. The results for quantities follow the same methodology as used for consumption expenditures (expenditure on catering and accommodation services is classified in group 11 Restaurants and hotels).

7   EXPLANATIONS

7.1 CLASSIFICATIONS

Data on allocated assets until 2018 are broken down in the categories of the European Classification of Individual Consumption according to Purpose (ECOICOP) – Regulation (EU) 2016/792 of the European Parliament and of the Council of 11 May 2016.

It is available at:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=COICOP_5&StrLanguageCode=EN&IntPcKey=&StrLayout

Data on allocated assets collected in 2022 are published in accordance with the revised international classification of individual consumption by purpose (COICOP 2018).

7.2 DATA PROCESSING

DATA EDITING

Data were statistically edited with the combination of systematic corrections and imputation procedures. The following imputation methods were used: logical imputations, mean imputations, hot-deck imputations.

For more, see the general methodological explanations Statistical data editing.

WEIGHTING

With weighting adjustment we want to achieve representatives of the sample, so that the weighted data give us as good population estimates as possible.

The process of weighting depends on the sampling design, the unit nonresponse rate and available auxiliary variables used for calibration. We use statistical regions, type of settlement, sex, age, quarter of the interview.

The final weight is the product of the sampling weight, the nonresponse weight and the calibration factor.

SEASONAL ADJUSTMENT

Seasonal adjustment was not performed.

7.3 INDICES

Indices are not published.

7.4 PRECISION

In statistical surveys different kinds of errors can occur (e.g. sampling error, non-response error, and measurement error) influencing the accuracy of the statistical results. Errors deriving from the random mechanisms determine the precision of the statistical estimates. The Statistical Office of the Republic of Slovenia draws attention to less precise estimates by flagging them with a special sign or by not publishing them at all.

If the table contains estimated population totals of (continuous) variables (average allocated assets / quantities per household/household member), publishing limitations are determined by the relative standard errors or the coefficients of variation (CV). In such cases it holds:

If the coefficient of variation (CV) of the estimate is

- 10% or below (CV <= 10%) the estimate is of acceptable precision and is published without limitations;
- in the interval from 10% and up to 30% (10% < CV <= 30%) the estimate is less precise and is flagged for caution with letter M;
- over 30% (CV > 30%), the estimate is too imprecise to be published and therefore suppressed for use by letter N.

For more, see the general methodological explanations Precision of statistical estimates.

If the table contains estimated proportions of units with a certain characteristic (expressed in percentages: structure of allocated assets, share of households with certain consumer durables), publishing limitations are determined by the standard errors of the estimates (SE) of the proportions. In such cases it holds:

If the standard error (SE) of the estimate of a proportion is

- 5% or below (SE <= 5%) the estimate is of acceptable precision and therefore published without limitations;
- in the interval from 5% and up to 15% (5% < SE <= 15%) the estimate is less precise and is flagged for caution with letter M;
- over 15% (SE > 15%), the estimate is too imprecise to be published and therefore suppressed for use by letter N.

For more, see the general methodological explanations Precision of statistical estimates.

7.5 OTHER EXPLANATIONS

Survey data are also used to calculate weights of the consumer price index, for national accounts and other derivative accounts related to consumption by the population.

Up to 2010 the results published for a certain year are based on the combined sample of three consecutive years and data were calculated to the middle year, which was used as the reference year.

From 2012, the survey was conducted on a large sample and we stopped combing the data of three consecutive years. Data collected from 2012 on refer to the reference year of data collection. Data for 2011 are not available, and in the future the survey will no longer be carried out each year, but every three years.

From 2015 we stopped publishing data on available assets of the households. Reference source for data on income is Living Conditions Survey (EU-SILC).

The totals sometimes do not add up due to rounding.

8   PUBLISHING

- SiStat Database: Quality of life - [Household expenditure](#); average allocated assets and structure of consumption broken down into categories of the COICOP, type of household, main source of income.
- First Release (Quality of life, Household expenditure): » Household Budget Survey «.
- Electronic Release (Quality of life, Household expenditure): » Household Budget Survey «.
- Eurostat - database

9   REVISION OF THE DATA

9.1 PUBLISHING OF PRELIMINARY AND FINAL DATA

Provisional data are not disseminated. Only final data are published.

9.2 FACTORS INFLUENCING COMPARABILITY OVER TIME

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 Eurostats recommendations and became a continuous one. By combining data of three consecutive years we obtained more accurate estimates. Data from three years were calculated to the middle year, which was used as the reference year for the 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. The latest available data according to this methodology are for 2010.

In 2012, the survey was again revised. The content of the questionnaire was expanded (maintenance of housing, education, household equipment, etc.). Questions on household income were excluded from the questionnaire and the data were obtained from administrative and registry data. At the same time also the data processing was revised. Consumption expenditure is classified by the newer version of the harmonized classification COICOP (5-digit), which ensures comparability of data between different users of the 5-digit code. The survey consists of two parts or sources: the survey and the register and administrative

data. The data that refer to income and some other information are gathered from the existing registers and administrative records and we link them to the survey results. The use of registers and administrative sources not only facilitates the diminishing of the burden on the respondents, but it also helps cut down the survey expenses.

In 2015 there were no major changes in the survey.

In 2018, monitoring of consumption expenditure remained the same. In the part where we monitor other expenditures (group 20 Other expenditures), i.e. purchase of a dwelling, major works and renovations, other expenditure, we excluded monitoring of the purchase and sale of dwelling or land.

In 2022 we introduced revised international Classification of Individual Consumption by Purpose - COICOP 2018. Data for 2022 are not directly comparable with those from the previous years.

10 OTHER METHODOLOGICAL MATERIALS

Methodological materials on SURS's website are available at https://www.stat.si/statweb/en/Methods/QuestionnairesMethodologicalExplanationsQualityReports.

Questionnaire (only in Slovene): Raziskovanje o porabi v gospodinjstvih (APG), theme: Quality of life, sub-theme: Household expenditure

https://www.stat.si/StatWeb/en/Methods/QuestionnairesMethodologicalExplanationsQualityReports

- Quality report for the survey:

    o Household Budget Survey (HBS)

Theme: Quality of life, SubTheme: Household expenditure

- Reference Metadata in Euro SDMX Metadata Structure (ESMS): Consumption expenditure of private households (hbs)

http://ec.europa.eu/eurostat/cache/metadata/en/hbs_esms.htm