

Euro-SDMX metadata structure (ESMS)

Country: Greece

Survey Name: Household Budget Survey 2011

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3. Statistical presentation Top	
3.1. Data description	
<p>The Household Budget Survey (HBS) is a national survey collecting information from a representative sample of households, on households' composition, members' employment status, living conditions and, mainly, focusing on their members' expenditure on goods and services as well as on their income. The expenditure information collected from households is very detailed. That is, information is not collected on the basis of total expenditure categories like "food", "clothing - footwear", "health ", etc., but separately for each expenditure, for example, white bread, fresh whole milk, fresh beef etc, footwear for men, footwear for women etc., services of medical analysis laboratories, pharmaceutical products etc.</p> <p>The main purpose of the HBS is to determine in detail the household expenditure pattern in order to revise the Consumer Price Index. Moreover, the HBS is the most appropriate source for in order to:</p> <ul style="list-style-type: none"> • Complete the available statistical data for the estimation of the total private consumption, • Study the households' expenditures and their structure in relation to their income and other economic, social and demographic characteristics, • Analyze the changes in the living conditions of the households in comparison with the previous surveys, • Study the relationship between households purchases and receipts in kind, • Study low income limits in the different socio-economic categories and population groups and • Study the changes in the nutritional habits of the country households. 	
3.2. Classification system	
<p>The HBS results are produced in accordance with the relevant International Classification Systems. Referring to:</p> <p>a) Regions or residence, the NUTS I classification, was used.</p>	

b) Level of education, the ISCED 1997 was used

c) Occupation, the ISCO 88 & ISCO 08 (more detailed codification was used than previous years) and

d) Economic activity, since the year 2008 the NACE (Rev. 2) was used.

3.3. Sector coverage

The HBSurvey collects information very detailed.

That is, information is not collected on the basis of total expenditure categories like "food", "clothing - footwear", "health ", etc., but separately for each expenditure, for example, white bread, fresh whole milk, fresh beef etc, footwear for men, footwear for women etc., services of medical analysis laboratories, pharmaceutical products etc.

Through this survey, alike the previous ones, information was collected on the value of purchases and the receipts in kind of the households as well as on the different characteristics of the households and their dwellings, aiming, mainly, to the revision of the Consumer Price Index compiled by the ELSTAT.

The two-stage area stratified sampling was applied for the Household Budget Survey 2011. The sample of private households was selected in two stages. The primary units are the areas (one or more unified building blocks) and the ultimate sampling units selected in each sampling area are the households. It is estimated that approximately 4.000 questionnaires will be filled in (number equal to, approximately, 1/1000 of the households within the whole Greek territory).

3.4. Statistical concepts and definitions

1. Household

Household is defined as either one person living alone or a group of persons, not necessarily related, living at the same address with common housekeeping. The household members share household's expenses or benefit from them due to lack of income.

2. Household members

Household members can either **usually reside** in the household or being **temporarily absent**.

Individuals usually residing in the household are considered the individuals that during the last 6 months have spent most of their time in the specific household.

Individuals temporarily absent from the household, **either** because they were in another private household **or** in a collective household (e.g. hospital, elderly house, etc.) will be considered as household members and will be registered in the questionnaire.

3.5. Statistical unit

Households and household members.

3.6. Statistical population

The survey covers all the private households throughout the country, irrespective of their size or socio-economic characteristics. The following were excluded from the survey:

- Institutional households of all types (boarding houses, elderly homes, hospitals, prisons, rehabilitation centers, camps, etc.)
- Households with more than five lodgers and
- Households with foreigners serving in diplomatic missions.

3.7. Reference area

The whole Greek territory.

3.8. Time coverage

Annual survey.

The first Household Budget Survey (HBS) was conducted during the years 1957/1958, its duration was one (1) year and the sample size was, approximately, 2500 households in the urban areas of the country.

In April of the year 1963 the survey started being conducted not only in the Urban areas but also in Semi-Urban and Rural areas as well (i.e. Municipalities and Communes) having population under the 10.000 inhabitants. In the concrete survey were included 3.755 households of these areas its duration was one (1) year and was continued up to year 1972 but in a sample size less than the 3.755 households.

The next HBSurveys were conducted during the years 1974, 1981/82, 1987/88, 1993/94, 1998/99 and 2004/05 and were covered all the areas of the country (urban, semi-urban and rural) and in a sample size of 7.500 households as regards the survey of the year 1974 and in a sample size from 6.000 up to 6.800 households for the each one of the next five surveys respectively. The duration of the above-mentioned surveys was one (1) year.

From the year 2008, taking into consideration the national needs for the Consumer Price Index compilation having a higher reliability than before in order to be produced comparable statistics which are used from the National Accounts Division, was decided the annual and continual conduct of the survey in an approximately number of 4.000 households in the whole Greek territory.

3.9. Base period

The year of survey conduct 2011.

4. Unit of measure

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Most indicators are reported as rates. Some are reported in other units (e.g. numbers, monetary units, etc.)

5. Reference period

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As **Reference periods** are considered the time intervals having a specific starting and ending date, to which expenditure and income of the household referred. In order to reduce sampling errors and difficulties in recalling the relevant details, various reference periods were used in the survey, according to the frequency of the types of expenditure incurred by the households or the received income.

Reference periods are considered (a) **the fourteen (14) days of the survey** for the daily expenditure on cleaning products (detergents, soaps, toilet paper, etc.), pharmaceutical

products (drugs, alcohol, etc.), household members' personal expenditure (cigarettes, newspapers, magazines, tickets, tissues, etc.), restaurants, taverns, café, etc. (b) **One Month, two months, three months, four months, six months or year**, for payments made at regular intervals for services e.g.: electricity, water, phone bills, communal charges, etc. circulation fees and car insurance, rent for main or secondary or countryside dwelling, (c) **The last 30 days, last 3, 6 or 12 months**, etc. prior the end of the household survey (including the 14 days of the survey) for expenditure on furniture, electric devices, etc., expenditure on clothes and footwear, medical appliances, etc., expenditure on health and education, on holidays, income from salaries, self-employment, farming, pensions, social benefits, etc.

6. Institutional mandate

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6.1. Legal acts and other agreements

The legal framework concerning the organization and operation of ELSTAT is as follows:

- Law 3832/2010 (Government Gazette No 38, Issue A): *"Hellenic Statistical System Establishment of the Hellenic Statistical Authority (ELSTAT) as an Independent Authority"*, as amended by article 90 paragraphs 8 and 9 of the Law 3842/2010 (Government Gazette No 58, Issue A): *"Restoration of fiscal justice, confrontation of tax evasion and other provisions"*, by article 10 of the Law 3899/2010 (Government Gazette No 212, Issue A): *"Urgent measures for the implementation of the assistance program of the Greek Economy"*, by article 45 of the Law 3943/2011 (Government Gazette No 66, Issue A): *"Combating tax evasion, staffing of auditing services and other provisions falling within the competence of the Ministry of Finance"*, by article 22 paragraph 1 of the Law 3965/2011 (Government Gazette No 113, Issue A): *"Operations Reform of the Consignment and Loan Fund, Public Debt Management Agency, Public Enterprises and Government bodies, the establishment of the General Secretary of Public Property and other provisions"* and by article 51 of the Law 4021/2011 (Government Gazette No 218, Issue A): *"Enhanced measures for the supervision and restructuring of Credit Institutions – Regulation of issues of financial nature – Ratification of the European Financial Stability Facility (EFSF) Framework-Agreement and its amendments and other provisions."*
- Regulation (EC) No 223/2009 of the European Parliament and of the Council, on the European statistics (Official Journal of the European Union L 87/164).
- Article 14 of the Law 3470/2006 (Government Gazette No 132, Issue A): *"National Export Council, tax regulations and other provisions"*.
- Article 3, paragraph 1c, of the Law 3448/2006 (Government Gazette No 57, Issue A): *"For the further use of information coming from the public sector and the settlement of matters falling within the responsibility of the Ministry of Interior, Public Administration and Decentralization"*.
- European Statistics Code of Practice, adopted by the Statistical Programme Committee on 24 February 2005 and promulgated in the Commission Recommendation of 25 May 2005 on the independence, integrity and accountability of the national and Community statistical Authorities, after its revision, which was adopted on 28 September 2011 by the European Statistical System Committee.
- Presidential Decree 226/2000 (Government Gazette No 195, Issue A): *"Organization of the General Secretariat of the National Statistical Service of Greece"*.
- Articles 4, 8, 9, 10, 12, 13, 14, 15 and 16 of the Law 2392/1996 (Government Gazette No 60, Issue A): *"Access of the General Secretariat of the National Statistical Service of Greece to administrative sources and administrative files, Statistical Confidentiality Committee, settlement of matters concerning the conduct of censuses and statistical works, as well as of matters of the General Secretariat of the National Statistical Service of Greece."*

The 2011 HBS has been conducted upon the decision of the Ministry of Economy and

Finance in a sample of private households throughout the country.

6.2. Data sharing

Not applicable.

7. Confidentiality

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7.1. Confidentiality - policy

The issues concerning the observance of statistical confidentiality by the Hellenic Statistical Authority (ELSTAT) are arranged by articles 6, 7 and 8 of the Law 3832/2010, as amended by article 90 paragraph 8 of Law 3842/2010 and by article 10 of Law 3899/2010, as well as by article 8 of Law 2392/1996, which was brought back into force, in accordance with article 90 paragraph 8 of Law 3842/2010.

Furthermore, ELSTAT disseminates the statistics in compliance with the statistical principles of the European Statistics Code of Practice and in particular with the principle of statistical confidentiality.

7.2. Confidentiality - data treatment

- ELSTAT protects and does not disseminate data it has obtained or it has access to, which enable the direct or indirect identification of the statistical units that have provided them by the disclosure of individual information directly received for statistical purposes or indirectly supplied from administrative or other sources. ELSTAT takes all appropriate preventive measures so as to render impossible the identification of individual statistical units by technical or other means that might reasonably be used by a third party. Statistical data that could potentially enable the identification of the statistical unit are disseminated by ELSTAT if and only if:
 - a) These data have been treated, as it is specifically set out in the Regulation on Statistical Obligations of the agencies of the Hellenic Statistical System (ELSS), in such a way that their dissemination does not prejudice statistical confidentiality or
 - b) the statistical unit has given its consent, without any reservations, for the disclosure of data.
- The confidential data that are transmitted by ELSS agencies to ELSTAT are used exclusively for statistical purposes and the only persons who have the right to have access to these data are the personnel engaged in this task and appointed by an act of the President of ELSTAT.
- The Statistical Confidentiality Committee (SCC) operating in ELSTAT, examines issues referring to the observance of statistical confidentiality. Within its competence is to recommend on:
 - the level of detail at which statistical data can be disseminated, so as the identification, either directly or indirectly, of the surveyed statistical unit is not possible;
 - the anonymization criteria for the microdata provided to users;
 - the granting to researchers access to confidential data for scientific purposes.

8. Release policy

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8.1. Release calendar

There is not specific release date for the survey results.

8.2. Release calendar access

Not applicable.

8.3. User access

The users are being informed for survey data announcement through the EL.STAT website. Statistics must be developed, produced and disseminated in a neutral manner, and that all users must be given equal treatment, in conformity with the statistical principles as set out and further elaborated in the European statistics Code of Practice.

9. Frequency of dissemination

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Annual.

10. Dissemination format

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10.1. News release

After being finalized the annual data of the survey.

10.2. Publications

None.

10.3. On-line database

None.

10.4. Micro-data access

The micro data files are provided to the users after submitting their application form in the competent section. In particular, they must be addressed to the Statistical Information and Publications Division and to electronic address data.dissem@statistics.gr.

10.5. Other

<http://dlib.statistics.gr/portal/page/portal/ESYE/>

11. Accessibility of documentation

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11.1. Documentation on methodology

Methodological information concerning the implemented method for the survey design and on the other hand the way of the total data elaboration, will be included in the Methodologic Information Sheet and the guidelines of the survey and will be posted on the EL.STAT website.

11.2. Quality documentation

Quality documentation for the survey results is included in the Quality Report.

12. Quality management

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12.1. Quality assurance

In order to be improved the comparability of the survey results among all the Member-states of the EU, the data quality of the Household Budget Survey is ensured and achieved on one hand in compliance with the Statistical principles in the European statistics Code of Practice and on the other hand by using a common standard questionnaire.

12.2. Quality assessment

Quality assessment is being accomplished by EL.STAT and Eurostat.

The sample size was such that to give and correspond to high accuracy results. Consequently, the sample size was representative of the reference population for the survey and all the appropriate measures were taken into account in order to be minimized the

errors during the survey conduct. Finally, on the basis of the pre-mentioned above, was achieved the total high quality of the statistical product for the survey.

13. Relevance

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13.1. User needs

The main user of the survey is Eurostat and on the other hand are users coming from :

- Ministries and public administrations, that use the data for economic and social policy planning purposes
- Universities (teachers/graduate and post graduate students), research organisations
- Private firms
- The public that often gets the information via mass media in publications made by the statistical offices

13.2. User satisfaction

Department of Statistical Information Transmission conducts a survey on users' satisfaction.
http://www.statistics.gr/portal/page/portal/ESYE/BUCKET/General/library_news_letter.pdf

13.3. Completeness

The variables and data coming from the survey conduct have been judged as having completeness and analysis in a high quality grade.

14. Accuracy and reliability

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14.1. Overall accuracy

Because of the fact the Household Budget Survey is a sampling survey, we have sampling and non-sampling errors. The overall accuracy of the survey was good enough.

14.2. Sampling error

The sampling errors are depicted by estimating the coefficient of variation for the main survey variables and their values are within the acceptance limits.

14.3. Non-sampling error

The non-sampling errors were divided into the following categories:

- Non response errors
- Elaboration errors
- Measure errors

Non response errors

In order to be decreased the percentage of non-response, the following acts were made:

- An introductory / informative letter was sent almost one month before the survey conduct in order the surveyed households to be informed that had been selected for the survey and asking for the household cooperation and the reliable information provision as well.
- Whenever the interviewer couldn't find, during the visit, the surveyed

household, threw the particular letter with the date of the next visit or his/her telephone number for contact (at least three visits at the surveyed household).

Elaboration errors

- Quality and quantity checks made on the data base for the elaboration errors correction

Measure errors

In order to be faced these errors the following acts were made:

- Provision of appropriate guidelines
- Educational trainings
- Checks were made on behalf of EL.STAT and on the other hand of EUROSTAT as well(logical/completeness/flow etc)

15. Timeliness and punctuality

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15.1. Timeliness

HBS cross-sectional data are available in the form of tables 270 days after the end of the data collection period.

15.2. Punctuality

The time lag between the actual date of data provision and the initial defined as target-date (date in which should have been produced the data) is the 30 days.

16. Comparability

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16.1. Comparability - geographical

Having been implemented common variables definitions and data production methods not only in all the geographical regions of our country but also and among all the EU countries, no geographical comparability problems have been caused.

16.2. Comparability - over time

In the HBSurvey, longitudinal comparability exists since the years 1974, 1981/82, 1987/88, 1993/94, 1998/99, 2004/05, 2008, 2009 and finally 2010.

17. Coherence

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17.1. Coherence - cross domain

The socio-demographic variables of HBS survey were compared with the same variables of other surveys conducted by ELSTAT such as the EU-SILC and Labour Force Survey as well. No significant differences were observed among the same variables.

17.2. Coherence - internal

No significant differentiations were found among surveys, which were carried out in EL.STAT and gathered data for the same variables (: it concerns the surveys of HBS, / EU - SILC & Labour Force Survey). None coherence problem was noticed among the survey variables.

18. Cost and burden

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The burden concerns the required time, which must be spent for data provision on behalf of

interviewer. Nevertheless, there is not possibility for any further time relief.

19. Data revision

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19.1. Data revision - policy

The revision policy concerns either on the survey data or on the same the survey (ie. the questionnaire, the sample etc), and takes place taking into consideration the users' needs for any further statistical information.

19.2. Data revision - practice

In conclusion, the data revision takes place after implementing checks materialized either by Eurostat or EL.STAT and after correcting data inconsistencies within either the same period or longitudinal as well.

20. Statistical processing

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20.1. Source data

Sample design /population under survey.

The two - stage area stratified sampling was adopted for the HBS survey based on the rotational integrated design method and on the Population Census of 2001 as well. The mentioned method was judged as the most appropriate for cross –sectional and longitudinal comparisons as well.

It was estimated that 4.000 questionnaires would have been filled in (number equal to, approximately, 1/1000 of the households within the whole Greek territory). The primary sampling units (PSUs) are the areas (one or more unified city blocks), the secondary sampling units selected in each primary unit are the households and their members. In each Region (NUTS 2), the stratification of primary units was conducted by allocating the Municipalities and Communes according to the degree of urbanization (urban, semi-urban, and rural regions). Except for the two former Major City Agglomerations (Athens and Thessaloniki), the produced strata according to the degree of urbanization are:

Areas	Stratum	Urbanization
Urban	1	Municipal communities with 10,000 inhabitants or more
Semi-urban	2	Municipal or local Communities with 2,000 to 9,999 inhabitants
Rural	3	Local Communities up to 1,999 inhabitants

The Greater Athens Area was divided into 31 strata of about equal size (equal number of households) on the basis of the lists of city blocks of the Municipalities that constitute it and taking into consideration socio-economic criteria. Similarly, the Greater Thessaloniki Area was

divided into 9 equally sized strata. The two former Major City Agglomerations account for 40% of the total population and for even larger percentages in certain socio-economic variables.

The total number of strata coming from the survey design was amounted to 79.

The total initial sample size of households was amounted to 4.000 (sampling fraction 0,09%) and was equally divided within the reference year, so as to have four (4) different equivalent independent samples which correspond to four quarters of the year.

1st stage of sampling

In this stage, from any stratum (crossing of Region with the degree of urbanisation), primary units were drawn. The number of draws is approximately proportional to the population size of the stratum (number of households in the last population census of the year 2001).

2nd stage of sampling

In this stage from each primary sampling unit (selected area) the sample of secondary units (households) was selected. Actually, in the second stage we drew a systematic sample of dwellings. However, in most cases, one household corresponds to each dwelling. If in the selected dwelling lives more than one household, all of them were interviewed. The sampling frame containing the secondary units (households) in the selected sampling primary units was **updated** before the selection of households.

Finally, the total number of drawn Municipalities amounted to 337 while the total number of drawn Communes amounted to 360 as well. In particular, the total number of the sampling units is 612.

20.2. Frequency of data collection

The frequency of data collection is continual spread within the reference year.

20.3. Data collection

The method of data collection is the Paper-Assisted Personal Interview (PAPI).

Questionnaires

The following separate questionnaires were used:

- a) *Household Questionnaire (register, dwelling information, expenditure)* - «HBS:1»
- b) *Personal questionnaire for members aged 14 and more (personal expenditure, employment, income)* - «HBS:2».
- c) *Personal questionnaire for members aged less than 14 years old (personal expenditure)* - «HBS:3»

In order to being conducted the survey as best as possible, auxiliary documents were used (i.e The map of the sampling areas and the Sampling Frames (constructed and updated)/ Diary in which must be written down the goods and services bought from the surveyed household

within the concrete reference period (their quantities and prices as well)/ Introductory letter coming from the Central Service and informing the household that has been selected for the survey and asking for its cooperation and the reliable information provision as well/ comments of interviewer concerning the quality of cooperation with the surveyed household/ Doc with codes concerning : goods and services / dwelling and household characteristics/income/Regional Offices/countries e.t.c.)

Way of Questionnaires' Completion

- a) Duration of the survey Conduct period

The total duration of the survey is 14 continuous days (working and not working)

- b) Timetable for the questionnaires' completion

In order to be completed the survey questionnaires the below procedure should be followed by the interviewer :

- a) During the **first day** must 1) be ensured the approach and reliable cooperation with the surveyed household 2) be completed the Part A of the HBS .1 which concerns the Household Synthesis (demographic data, nationality and main economic activity) and data concerning education and health of household members. In addition must be completed the second part of the HBS.2 which concerns the employment status of the household members. Finally, the Diary must be given to the surveyed households in order to be written down the daily purchases for goods and services during the next 13 days (the first day is included as well).Additionally, the way of their completion must be explained to all the household members aged 7 +.
- b) In order to be facilitated the daily cooperation between the interviewer and the household members, during the next **12 days** must be gradually completed both the Parts B and JB of the HBS.1 (they concern the main dwelling's data and the income sources of the household respectively) and the expenditures of the Parts C- JA of the HBS.1 by allocating them within the next 2 weeks. In addition, must be checked the expenditure which have been written down by the household members in the Diaries and be transferred either to the HBS.1 or to the HBS.2 (part A: personal expenditure) or to the HBS .3.
- c) During **the last day** (14th day) must be written down all the expenditure of the 13th day and must be completed the Part C of the HBS.2 (concerns: the income of the household members) as well. Finally all the mistakes must be corrected and all the cases in abeyance must be settled.

20.4. Data validation

Data validation is being done by conducting qualitative and quantitative tests based on:

- Longitudinal checks on raw data (with data of previous years)
- Comparisons key variables with variables / data of other statistical sources
- Calculation of sampling errors, also used as a criterion for the final validation of data

20.5. Data compilation

20.6. Adjustment
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21. Comment

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