

Single Integrated Metadata Structure (SIMS v2.0) (user oriented)

Country: Greece

Compiling agency: ELSTAT

Domain name: HOUSEHOLD BUDGET SURVEY, 2016

ELSTAT metadata
<u>Reference metadata</u>
1. Contact 2. Metadata update 3. Statistical Presentation 4. Unit of measure 5. Reference period 6. Institutional mandate 7. Confidentiality 8. Release policy 9. Frequency of dissemination 10. Accessibility and clarity 11. Quality management 12. Relevance 13. Accuracy and reliability 14. Timeliness and punctuality 15. Coherence and comparability 16. Cost and burden 17. Data revision 18. Statistical processing 19. Comment

1. Contact	Top
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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 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 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, the NUTS II Classification, was used.</p> <p>b) Level of education, the ISCED 2011 was used</p> <p>c) Occupation, ISCO 08 was used and</p> <p>d) Economic activity, since the year 2008 the NACE (Rev. 2) has been used.</p>	
3.3 Sector coverage	
<p>The HBSurvey collects very detailed information. 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>Through this survey 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</p>	

Consumer Price Index compiled by ELSTAT.

The two-stage area stratified sampling was applied for the 2016 Household Budget Survey. 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. The initial simple size was 6,400 households, while the final simple size was 6,073 households.

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.) are considered as household members and are 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.

On April 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 10.000 inhabitants. In the concrete survey were included 3.755 households in these areas. Its duration was one (1) year and was continued up to year 1972 but with a smaller sample size.

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

From year 2008, taking into consideration the national needs for the Consumer Price Index compilation and in order to have higher reliability for being able to produce comparable statistics used by the National Accounts Division, it was decided the annual and continual conduct of the survey with a sample of approximately 4.000 households in the whole Greek territory. In 2014 the sample size was higher in order to have results of higher reliability at NUTS2 level.

3.9 Base period

The year of survey conduct, 2016

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 refer. 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, cafés, 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 to 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 2016 HBS has been conducted upon the decision of the President of ELSTAT 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 of access to researchers on confidential data for scientific purposes.

8. Release policy

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8.1 Release calendar

29.6.2017

8.2 Release calendar access

[Release calendar 2017](#)

8.3 User access

The users are being informed for survey data announcement through ELSTAT's website. Statistics must be developed, produced and disseminated in a neutral manner, so 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	Top
Annual	

10. Accessibility and clarity	Top
10.1 News release	
HOUSEHOLD BUDGET SURVEY 2016: Press Release	
10.2 Publications	
http://www.statistics.gr/en/living-conditions-in-greece	
10.3 On-line database	
None	
<u>10.3.1 Data tables - consultations</u>	
http://www.statistics.gr/en/statistics/-/publication/SFA05/2016	
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, users seeking for access to the data should address to the Statistical Information and Publications Division in the following electronic address: data.dissem@statistics.gr .	
10.5 Other	
<u>10.5.1 Metadata – consultations</u>	
10.6 Documentation on methodology	
All relevant information is on ELSTAT's website, in the following address http://www.statistics.gr/en/statistics/-/publication/SFA05/2016	
<u>10.6.1 Metadata completeness – rate</u>	
10.7 Quality documentation	
Quality documentation for the survey results is included in the Quality Report (User Oriented) Codes of Goods, Services, Incomes, Prefectures and Countries, Characteristics of Households and Dwellings (COICOP) (2016)	

11. Quality management	Top
11.1 Quality assurance	
In order to improve the comparability of the survey results among Member-states, the data quality of the Household Budget Survey is ensured and achieved on one hand by the compliance with the statistical principles in the European Statistics Code of Practice and on the other hand by using a common, standard questionnaire.	

11.2 Quality assessment

The sample size was such that would provide results of high accuracy. 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 minimize the errors during the survey conduct.

12. Relevance

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12.1 User needs

The main user of the survey is Eurostat and on the other hand 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

12.2 User satisfaction

The Department of Statistical Information Transmission in ELSTAT conducts a survey on users' satisfaction.

http://www.statistics.gr/portal/page/portal/ESYE/BUCKET/General/library_news_letter.pdf

12.3 Data completeness

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

13. Accuracy and reliability

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13.1 Overall accuracy

Because of the fact the Household Budget Survey is a sampling survey, we have sampling and non-sampling errors. During the previous years, 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.

13.3 Non-sampling error

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

- Non-response errors
- Elaboration errors
- Measurement errors

a. Unit non – response

In order to decrease the percentage of non-response, the following were implemented:

- An introductory / informative letter was sent almost one month before the survey launch in order to inform the households that they had been selected for the survey and asking for their cooperation and the reliable information provision as well.
- Whenever the interviewer couldn't find, during the visit, the surveyed household, he/she left 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).

The non-response rate before substitutions was 33.7% (2,049 households refused to co-operate, were absent or unable to communicate due to illness etc).

b. Item non - response

13.3.1 Coverage error

13.3.1.1 Over-coverage – rate

13.3.1.2 Common units – proportion

13.3.2 Measurement error

Measure errors

These errors were faced with the following ways:

- Provision of appropriate guidelines
- Training

Checks made by ELSTAT (logical/completeness/flow etc)

13.3.3 Processing error

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

13.3.4 Model assumption error

14. Timeliness and punctuality

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14.1 Timeliness

HBS cross-sectional data are available in the form of tables, usually, 180 days after the end of the data collection period.

15.2. Punctuality

There was no time lag in the provision of survey results.

15. Coherence and comparability

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15.1 Comparability - geographical

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

15.1.1 Assymetry for mirror flows statistics – coefficient

15.2 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, 2010, 2011, 2012, 2013, 2014, 2015 and finally 2016.

15.3 Coherence cross-domain

15.3.1 Coherence – sub annual and annual statistics

During the previous years, 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 in 2015 results of the three surveys.

15.3.2 Coherence – National Accounts

15.4 Coherence - internal

As mentioned above, no significant differences are observed among these surveys carried out by EL.STAT. More details on coherence will be presented in the 2016 HBS Quality Report.

16. Cost and burden

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The burden concerns the required time, which must be spent for data provision on behalf of the interviewer. Nevertheless, there is not possibility for any further time relief.

17. Data revision

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17.1 Revision policy

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

17.2 Revision practice

Since all current users' need have been recognized, in order to achieve longitudinal comparability for the survey among the Member- States, all the national questionnaires are being re-designed carefully.

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 longitudinally as well.

18. Statistical processing

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18.1 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 2011 as well. This method was judged as the most appropriate for both cross –sectional and longitudinal comparisons.

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 37% of the total population and for even larger percentages in certain socio-economic variables.

The total initial sample size of households was amounted to 6,338 (sampling fraction 01.43‰) 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 2011).

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.

The total number of the primary sampling units was 1.023. Due to non-response, the actual total number of primary sampling units was 1.020.

18.2 Frequency of data collection

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

18.3 Data collection

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

Questionnaires

Household Questionnaire (2016)

Individual Questionnaire for members aged more than 14 years old (2016)

Individual Questionnaire for members aged less than 14 years old (2016)

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.

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.

18.4 Data validation

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

- Longitudinal checks on raw data (with data of previous years)
- Comparisons of key variables with variables / data of other statistical sources

Calculation of sampling errors, also used as a criterion for the final validation of data

18.5 Data compilation

For grossing up procedure please consult 2016 HBS Quality Report

18.5.1 Imputation – rate

18.6 Adjustment

18.6.1 Seasonal adjustment

19. Comment

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