

# Household survey analysis aimed at harmonization of household survey questionnaires

Rafkat Khassanov, UNECE consultant

# **Analysis of household expenditure questionnaire in HBS**

# Ways to obtain expenditure data

- Daily expenditure diary (Armenia, Kazakhstan)
- Monthly income and expenditure log (Belarus)
- Quarterly questionnaire on household expenditure and income (Belarus, Kazakhstan)
- Food expenditure diary (Belarus)
- Household diary (Moldova)
- Main household questionnaire (Moldova)

# Number of classes in national household expenditure classifications

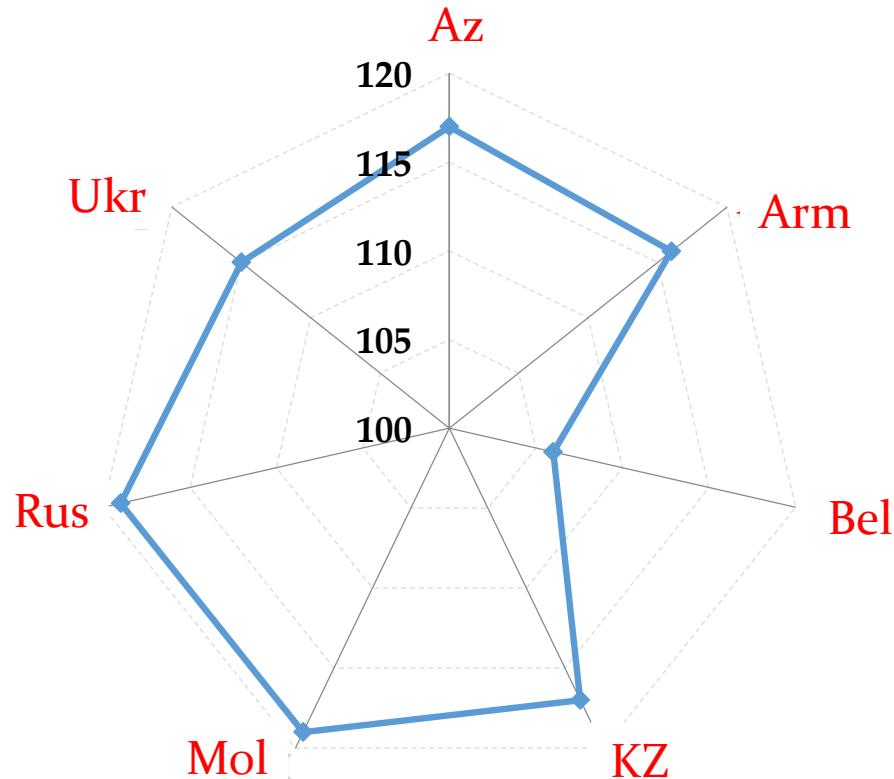
		Azer	Arm	Bel	KZ	Mold	Rus	Ukr
01	Food and non-alcoholic beverages	11	11	11	11	11	11	11
02	Alcoholic beverages, tobacco and narcotics	5	4	4	5	5	6	5
03	Clothing and footwear	6	6	6	6	12	6	6
04	Housing, water, electricity, gas and other fuels	15	15	8	15	12	15	15
05	Furnishings, household equipment and routine household maintenance	12	12	12	12	14	12	12
06	Health	7	7	7	7	9	7	7
07	Transport	14	14	14	14	14	15	14
08	Communication	3	3	3	3	3	3	3
09	Recreation and culture	21	21	21	21	17	21	21
10	Education	5	5	4	5	4	5	5
11	Restaurants and hotels	3	3	3	3	3	3	3
12	Miscellaneous goods and services	15	15	13	15	15	15	13
	TOTAL CLASSES:	117	116	106	117	119	119	115

# Number of categories in national household expenditure classifications

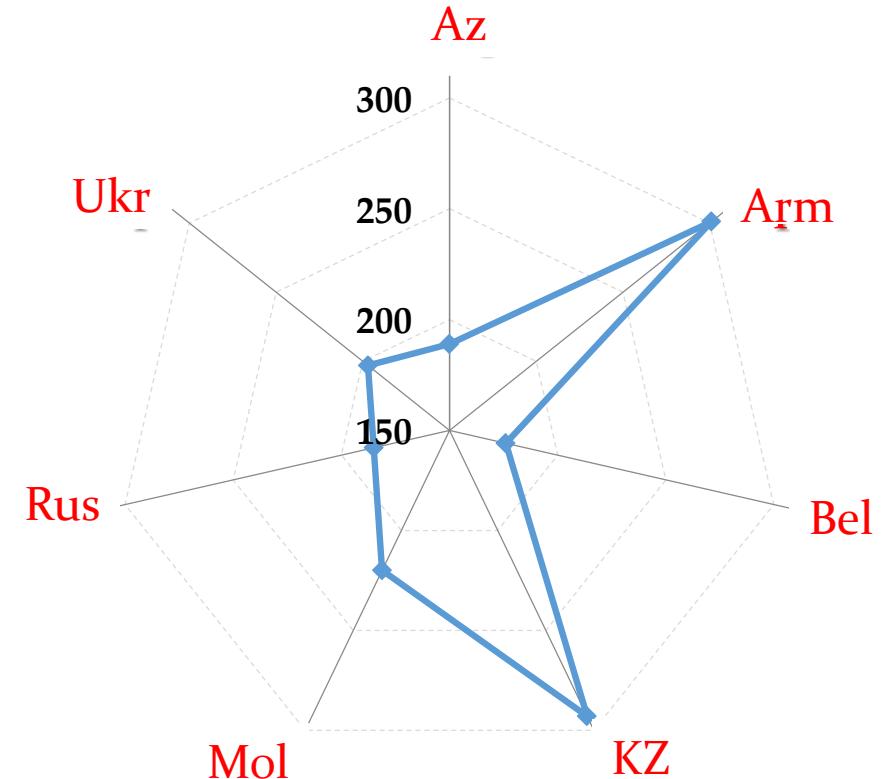
		Azer	Arm	Bel	KZ	Mold	Rus	Ukr
01	Food and non-alcoholic beverages	43	61	45	48	62	43	62
02	Alcoholic beverages, tobacco and narcotics	7	13	4	9	7	5	8
03	Clothing and footwear	11	12	15	14	33	12	10
04	Housing, water, electricity, gas and other fuels	18	24	12	18	14	18	16
05	Furnishings, household equipment and routine household maintenance	26	40	27	42	27	23	23
06	Health	12	14	8	15	11	12	9
07	Transport	17	28	15	19	14	18	15
08	Communication	3	11	3	9	3	3	3
09	Recreation and culture	24	53	23	63	22	24	27
10	Education	5	6	4	5	5	5	5
11	Restaurants and hotels	6	6	3	12	4	6	4
12	Miscellaneous goods and services	17	33	17	39	18	16	15
	TOTAL CATEGORIES:	189	301	176	293	220	185	197

# National expenditure classifications

Number of classes



Number of categories



# Main conclusions

- 9 out of 11 reviewed countries use the Classification of Individual Consumption According to Purpose for processing survey data;
- Existing differences in the country-specific classifications (in the lists of goods and services, level of aggregation across some groups) do not result in systemic distortions to prevent harmonization of questionnaires;
- In the countries which do not use COICOP (Kyrgyzstan and Tajikistan) a harmonized questionnaire can be also used: the overall approach to identifying household expenditure is not very different and this will allow them switching to the new format without substantial costs

# **Analysis of household income questionnaire in HBS**

# Income module

- The number of major income items vary from 13 to 42 (approximately because there are additional clarification subitems)
- There are some seeds of income classification through codification or question numbering but in general classification does not exist
- Aggregated income structure is largely comparable across the countries

- On the first level most questionnaires define the following divisions: *income from employment, from sales, and different allowances and transfers*. In general, the divisions are structured as follows:
  - income from employment,
  - remittances,
  - property income,
  - income from sales,
  - transfer income,
  - other income.
- On the second level there is no common approach

# Some specifics of questionnaires

- Countries have their specifics in the treatment of income items, particularly:
  - Reflection of country's social policy specifics
  - Inclusion of agricultural activities
  - Inclusion of additional questions related to income sources, jobs, household members' income
  - There is some uncertainty about valuating in-kind income
  - There is no common approach towards changes in assets and liabilities.
  - Use of individual questionnaires for factor income (e.g. income from employment), and household questionnaires for social benefits

# **Assessment of deprivation questions in HBS**

# Purpose

- To identify HBS questions designed to measure deprivations
- To compare with EU-SILC variables
- To analyse to what extent questions on deprivations are captured in HBS questionnaires

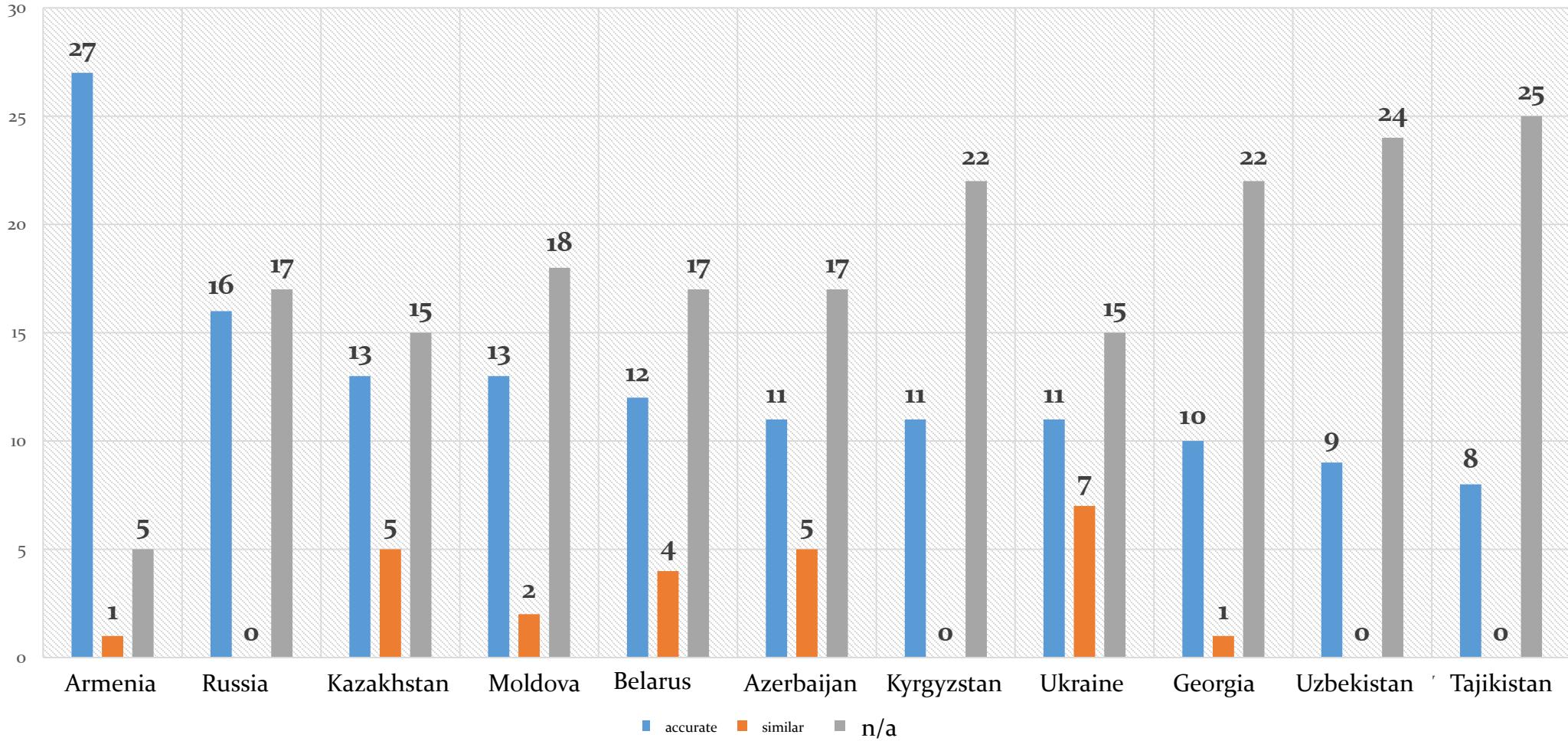
# **Major deprivation modules in EU-SILC**

- **Social exclusion:**
  - Indicators of household non-monetary deprivations
  - Indebtedness
  - Environment
- **Material deprivations:**
  - Financial stress
  - Basic needs
  - Leisure and social participation
  - Durables

# Secondary variables

- Housing conditions
- Access to health care
- Access to education

# Number of HBS questions on deprivation, by countries



# Frequently asked questions

- All questionnaires contain lists of durables and all have 5 durables specified in EU-SILC (telephone, colour TV, computer, washing machine and personal car).
- 9 out of 11 countries ask on the availability of a bath/shower and toilet as well as number of rooms in household dwelling (except for Russian and Belarus).
- 8 questionnaires ask whether household are able to ‘make ends meet’, 6 questionnaires ask on a minimum income required for that.
- 6 questionnaires ask to some extent on access to health care, 5 ask on access to education.
- 6 questionnaires have questions on Internet connection.
- 5 countries measure household utility debts.
- All other questions are rarely found in questionnaires (at most from 2 to 4 countries have questions on the remaining deprivations).

# **Additional questionnaires on poverty self-assessment**

- Module on social exclusion (Armenia)
- Section on subjective poverty assessment (Azerbaijan)
- Questionnaire on well-being assessment (Belarus)
- Section on subjective poverty assessment (Georgia)
- Questionnaire on well-being assessment (Kazakhstan)
- Section on living conditions (Moldova)
- Questionnaire on income self-assessment (Ukraine)
- Section on household financial status (Russia)

Only Kyrgyzstan, Uzbekistan and Tajikistan have no separate sections and questionnaires on poverty self-assessment

# Main conclusions

**There is a strong base for harmonizing questionnaires on consumer expenditures**

- All questionnaires use the same sections
- Most countries use COICOP for coding goods and services. Differences in country-specific COICOPs do not result in systemic distortions up to a class level (third level of code hierarchy)

**Lack of income classification can create serious difficulties for harmonizing income questionnaires.**

- There are some differences on the first level of income classifications which become stronger when moving down in the income hierarchy
- Common classification needs to be adopted at the level of divisions and groups

**There is no agreed common approach towards deprivations**

- Many country-specific questionnaires try to measure different deprivations
- EU-SILC questionnaire is proposed to be taken as a basis
  - To remove all non-relevant questions
  - To add most commonly asked questions from the reviewed questionnaires