

## Hungary 1999: Survey Information

### Summary table

<b>Generic information</b>	
Name of survey	Tárki Household Monitor Survey ( <i>Tárki Háztartás Monitor</i> )
Institution responsible	Tárki Social Research Centre
Frequency	Annual
Survey year / Wave	2000
Collection period	19 April 2000 to 23 May 2000
Survey structure	Cross-sectional
Coverage	
Geographic information	County level
Files delivered	One single file containing both household and personal level data (household level data are repeated for each household member)
<b>Sample size</b>	
Households	2,013 (interviewed)
Individuals	5,517 (of which 951 children under 16, 3,862 adults with completed individual questionnaire and 704 adults without)
<b>Sampling</b>	
Sampling design	Two-stage sampling with localities selected within each of 9 strata, and households within each selected locality
Sampling frame	Central Registration and Election Office
<b>Questionnaires</b>	Household Questionnaire, Individual Questionnaire (for 16+) and Substitutional Questionnaire (proxy -quest. for 16+)
<b>Standard classifications</b>	
Education	Own classification (8 categories)
Occupation	4-digit ISCO-88 code
Industry	Own classification (20 categories)
<b>Income</b>	
Reference period	April 1999 to March 2000 (one year)
Unit of collection	Mostly individual, excl. income from household production (raising animals or agriculture), rental income, maintenance and support payments from other households and irregular lump -sums (prizes and premiums)
Period of collection	Monthly income together with number of months received during reference year for most individual income source; yearly for household income sources and some individual more irregular ones (casual work, bonuses, profits, shares, etc.).
Gross/net	Variables are collected net of taxes and contributions
<b>Data editing / processing</b>	
Consistency checks	Scarce (summary variables creation, missings recodes and very few plausibility checks and corrections).
Weighting	One person weight and one household weight. Both variables adjust demographic and geographic characteristics of the sample to the population structure of the Hungarian 1996 Microcensus.
Imputation	Imputation of zero and missing values of total personal income for employed, self-employed and pensioners. Imputed values based on collected data.

This document is based upon documents from Tárki.

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## **A. General characteristics**

Official name of the survey/data source:

Tárki Household Monitor Survey (*Tárki Háztartás Monitor*)

Administrative Unit responsible for the survey:

Tárki Social Research Centre Address: H-1112 Budapest - Budaörsi út 45. - Hungary Postal Address: H-1518 Budapest Pf.71. Phone: 36-1-309-7676 (central); +31-1-309-7684 (data collection) Fax: 36-1-309-7666 E-mail: tarki@tarki.hu Web: www.tarki.hu
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In terms of its research topics, the Household Monitor is the continuation of the Hungarian Household Panel (held between 1991 and 1997), without its longitudinal character. Its purpose is the quick assessment of the changes in the stratification of society and in social inequalities. The survey is primarily focussed on issues concerning the labour market and incomes, consumer attitudes, savings, economic expectations and economic behaviour, as well as changing social relations. The survey is supported by several governmental and state institutions, as well as by private institutions through research commissions (funds from the Ministry of Finance, the Ministry of Welfare, the Hungarian National Bank, the National Employment Foundation, the Hungarian Alliance Bank and the National Savings Bank). The survey encompassing up to 2000 households is normally conducted in late spring and each year a specific volume containing the results is published, available to the public.

## **B. Population, sampling size and sampling methods**

Sample size

## Sampling design

The sample was a household probability sample with proportional stratification. In the first stage nine strata were created according to the sizes of the localities, from these strata the localities were selected that would be in the sample. In the second stage the number of households to be included in the sample strata was defined according to the proportion of the households in the given strata. Then the number of households to be included in the sample from each locality was defined according to the proportion of the households in the chosen localities. The addresses of the chosen households were acquired from the Central Registration and Election Office. The dropped out addresses were replaced by so-called „extra addresses”.

## **C. Data collection and acquisition**

### Data collection period

All interviews were carried out between 19 April 2000 and 23 May 2000.

### Questionnaire

There are 3 questionnaires:

- *Household questionnaire*: contains information on all household members (main demographics plus activity status), information on the dwelling, and household financial situation, including expenditures, debts, insurance, accounts, wealth, durables, income from rents, prizes, maintenance alimony, presents, and maintenance and presents paid, consumption, own production.
- *Individual questionnaire*: contains information for individuals aged 16 or over on education, health, employment/unemployment, income, pension schemes, insurance, accounts, values and satisfaction indicators, hobbies and sports.
- *Substitutional questionnaire*: proxy questionnaire for adult members who do not want / cannot answer themselves; information recorded concerns only education, activity status, current (last) occupation and total income.

## **D. Definition of the survey units**

### Head of household

The head of household was selected according to the following criteria:

- the oldest man of working age in the household;
- if no such member of family: the oldest woman of working age;
- if no member of family of working age: the oldest man on old-age pension;
- if no such member of family: the oldest woman on old-age pension.

## E. Contents

The main topics of the survey are:

- Labour market
- Incomes
- Consumer attitudes
- Savings
- Economic expectations
- Economic behaviour
- Changing social relations.

## F. Quality of data

### Data editing, validation, imputation

Editing work has been carried out within two main areas:

- household composition: creation of several variables such as household size, composition, type, number of children, age of head, etc.
- income variables: plausibility checks and subsequent corrections, creation of summary variables, recodes of missing, imputation of zero and missings.

The main edits are summarised below.

*Activity status:* Household members coded as top or middle managers but declaring not having any employees have been recoded according to whether they have a college or university diploma into “with diploma” or “other manual worker”.

*Missing recodes:* Missing values, refusals (code 8), don’t know (code 9) and did not receive (code 0) for income variables have all been recoded into zeros.

*Household income variables:* Interest income has been calculated at the household level assuming an annual interest rate of 10.3% and taking the midpoint of ranges in case of approximation of savings amounts. Summary household income variables have been created.

*Individual income variables:* Yearly variables have been created by multiplying the monthly amounts by the number of months received. Summary income variables have been created both for total yearly income and March 2000 income (in case of rare incomes and enterprise incomes, amount received in last 12 months was corrected for an inflation rate of 5.4% when reduced to the current monthly amount). Total net personal income for March 2000 has been equalised to estimated monthly total income in case the latter was greater than the first. Total net yearly personal income has been equalised to 12 times the estimated monthly total income and corrected for inflation in case the latter was existing while the first was not.

*Total income variables:* All individual level income variables have been aggregated at the household level, and summary total income variables (including incomes collected both at the individual and household levels) have been created.

*Imputation:* Imputation has been carried out for income variables, since the income of those households where there is missing information for any of the members is not invalidated. Income has been imputed based on the collected data, always on the level of the individuals, and only for summary income variables, never the detailed categories. The imputation process consists of the following:

- *Zero and missing total personal incomes* were imputed for employed, self-employed and pensioners. The imputation method consisted in equalising total personal income for March 2000 to the weighted mean of total personal incomes (for March 2000) for sub-groups of population according to 3 categories of educational level, 3 age groups and to whether they live in Budapest or not. A flag for imputed cases was created.
- In case of *missing income from main job for top and middle managers*, total personal current income was multiplied respectively by 2.2 (top) and 1.5 (middle managers).
- *Total yearly personal income* was imputed as being 12 times the current one (eventually imputed) corrected for inflation.

### Weighting

There are two weights, one for individuals and one for households. Both adjust the sample to the 1996 Hungarian Microcensus according to the following parameters: size of locality, household size, age and education level of the household head for the household weight, and gender, age, education level and locality for the individual weight.

## **G. Uses of the survey**

### Publications

Each year a specific volume containing the results of the survey is published in Hungarian only. The report for the 2000 Household Monitor is available on the Internet at <http://www.tarki.hu/research-h/monitor/monitor2000> (TÁRKI MONITOR JELENTÉSEK, edited by Szivós Péter and Tóth István György, Budapest, 2000).

### Poverty

The Gini index computed by Tarki on the basis of the 2000 Household Monitor is 33.01. This figure is bound to overestimate income inequality due to the exclusion of imputed and estimated incomes from the calculation.