

STATEC

The Household Budget Survey in Luxembourg

LCS Workshop

15/01/2026



A Survey As Old As STATEC

- 1962: Creation of STATEC
- 1963: 1st HBS
- 1977: 2nd HBS
- 1986/1987: 3rd HBS
- 1993: 4rd HBS
- 1998: 5th HBS
- Since 2005 => annual data collection (around 1000 households interviewed every year)

Main Objectives

- Weighting Price Indices
- Input data for National Accounts
- Socio-economic analysis (poverty, inequality, social exclusion, well-being ...)

Survey Instruments



ENQUÊTE
Budget des ménages

N° DE MÉNAGE

DÉPENSES DIVERSES

Vêtements, voyages, meubles, santé, transports, assurances et autres

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ENQUÊTE
Budget des ménages

N° DE MÉNAGE

DÉPENSES EN LOGEMENT

Composition du ménage et caractéristiques du logement

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ENQUÊTE
Budget des ménages

N° DE MÉNAGE

DÉPENSES ALIMENTAIRES

Carnet de ménage sur 15 jours

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Main Design Features

- **Achieved sample size:** between 1000 and 1500 households every year
- **Sampling design:** stratified simple random sample of individuals aged 18-75
- **Data collection mode:** PAPI (freelance interviewers)
- **Data collection period:** the entire calendar year
- **Reference period:** 2 weeks (diary); 1, 3, 6 or 12 months (retrospective questionnaire); current interview period (household questionnaire)

Underlying Concepts

- **Analysis unit:** Household
- **Household:** group of individuals living within the same dwelling and sharing a common budget (economic approach)
- **Collective households and institutions:** excluded
- **Consumption:** (actual) final consumption
 - Expenses paid by household
 - Imputed rent: included
 - STIK: excluded
 - Own-consumption: included from 2026 onwards (but marginal in Lux)
 - Free public services (education, school, transport): excluded
 - Insurance: premiums (except health insurance – excluded)
 - Leasing/hire purchases: regular payments
 - Gifts/valuables: excluded

Challenges ahead

- **Objective:** Improve data accuracy
 - Use of the official administrative portal MyGuichet to increase participation
 - Adopt a mixed-mode approach (PAPI, CAWI, CATI)
 - Foster the use of administrative sources in replacement of survey questions => income variables (IGSS) and energy expenditures (smart meter data)
- Work in progress

Lessons for LCS

- **Very welcome initiative to better promote the use of HBS data among researchers**
- Obvious tradeoff between theoretical and operational concepts (household, consumption...)
- Cross-country comparability is a key issue
- Importance to provide an extensive meta-information to researchers

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Thank you! / Merci !



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