

# Index

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## Presentation

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## Introduction

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### 1. Objectives of the survey

---

### 2. Scope of the investigation

---

### 3. Content

---

### 4. Sample design

---

### 5. Basic concepts

---

### 6. Main characteristic object of study: Household consumer expenses

---

### 7. Variables

---

### 8. Methodological changes introduced in the HBS

---

### 9. Comparison of classification variables between HBS 1985 and HBS 1997

---

### Annex 1. Classification of goods and services. COICOP/HBS

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### Annex 2. Relationship between COICOP/HBS and PROCOME

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**Annex 3. PROCOME codes**

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**Annex 4. Classification of level of studies finished**

# Presentation

The National Statistics Institute has been carrying out a continuous survey directed at households who have been living in main family dwellings since 1985. Its objective is to ascertain the volume of quarterly and annual expenses of Spanish families as well as the evolution of these variables over time and in relation to various socio-demographic characteristics of the population. The results of this investigation are available in the series of publications *Household Budget Survey* (HBS), extending the information already published in the corresponding results PREVIEWES that are published a few weeks after the end of each quarter.

As of the third quarter of 1997 the HBS has been completely reformed, consisting in a considerable increase in the size of the sample (up to approximately 8000 households each quarter, up from the 3200 in the previous design), together with various adaptations to the new needs of users and demands for international harmonisation.

The survey methodology has already been published in separate volumes, which will facilitate users in understanding the concepts used and the correct interpretation of the results, and the first results for 1998 which were obtained from the provisional sample files.

The INE is grateful once again for the collaboration provided by families included in the sample, without whose effort in filling in the questionnaires it would not have been possible to obtain the results now presented.

**Carmen Alcaide Guindo**

INE President.

# Introduction

Up until the third quarter of 1997 within the Spanish statistical system two household budget surveys coexisted. The continuous survey, whose objective was to provide a quarterly short term indicator of the evolution of consumer expenses, and the basic survey, whose objectives were structural. Having two simultaneous investigations has some advantages (wealth of information, quarterly, annual, structural, on change...). However, it also has some disadvantages such as the higher cost and difficulty in taking advantage of the greater efficiency in material and human resources that the continuous survey provided for its application to the very different processes of the basic survey, content and methodology. Taken together with the requirements for European harmonisation, it forced us to consider the advisability of modifying this process. As of this date the decision was taken to elaborate a single survey of household budgets that would cover the objectives of both information sources.

The new continuous household budget survey arose as a result of this decision (HBS 1997).

# 1.Objectives of the survey

Among the objectives of this information source, it is worth highlighting the following:

- The obtaining of estimates for the quarterly consumer expenses group for autonomous communities, on a COICOP/HBS two digit level, as well as its classification according to various household variables, generally represented by the main breadwinner, or by its members.
- The estimate of the quarterly interannual change in consumer spending, on an autonomous community level, to two digits of the COICOP/HBS.
- The obtaining of the annual expenses group of households as the sum of the quarterly estimates, on an autonomous community level, to 5 digits of the COICOP/HBS classification as well as its classification according to various household variables as a whole or for its members.
- The estimate for the whole country, of annual and quarterly consumption in physical quantities of certain food goods.

Apart from the aforementioned purely economic objectives, other mixed, social or socio-economic objectives are oriented at dealing with the needs of the social indicators and social investigation system in general. The possibility of obtaining annual statistical data on different areas of social concern, for the study of which individual information for each household is required annually, for example on poverty and inequality, distribution and concentration of income and expenses, equipment, housing, health, education, is especially considered.

The new survey will similarly facilitate maintaining the traditional objectives of the basic household budget surveys, in other words, providing structural information for the estimation of private consumption by National Accounts functions, and supplying, where necessary, the set of weightings for the elaboration of the Consumer Price Index (CPI) based on pluriannual publications (2 years or more).

## 2.Scope of the investigation

The population investigated in the sample, to which all the data and its tabulations refer, is the set of households who live in main family dwellings.

The geographical scope of the research is made up by the whole of Spain.

The temporal scope corresponds to each quarterly cycle as of the second quarter of 1997. Annual estimates are obtained as the sum of quarterly estimates. The data that requires the use of the longitudinal file will have a flexible year for the household information reference year, made up of four consecutive quarterly cycles concentrated on the year with reference t.

# 3. Contents

The HBS mainly studies consumer spending (quarterly and annually), current regular monthly household income and other variables whose content has been detailed in the HBS survey methodology.

Household consumption expenses are classified in accordance with a new classification of consumption expenses. the COICOP/HBS.

# 4. Sample design

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## 4.1 Type of sample

A two stage sample has been used with stratification of the first stage unit. An independent sample has been selected within each autonomous community.

The first stage units are the census sections in which the whole country is divided at the moment of the survey.

The second stage units are main family dwellings. No subsample has been carried out at all and all households who reside there have been investigated.

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## 4.2 Size of the sample

A sample size of 1008 census sections has been established and 8 dwellings investigated for each one of them. This means a theoretical sample of 8064 dwellings per quarter.

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## 4.3 Selection of the sample

Sections were selected, within each stratum, with probability that is proportional to its population size and dwellings with equal probability in each section of the sample by means of systematic sample with random start.

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## 4.4 Distribution of the sample in time

The sample has been distributed uniformly over the weeks in the quarter with the objective that all of them are equally represented on a stratum, province and autonomous community level.

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## 4.5 Renewal of the sample

The survey is carried out each quarter. Given the complexity of the sample and with the object of avoiding families from tiring, as well as facilitating the probability of selection to other families, the *rotation shifts* method has been introduced in order to facilitate partial renewal of the sample.

The sample of sections remains fixed in the survey over the intercensal periods, while dwellings are renewed each quarter in accordance with the following schema:

1º) The sample is divided into eight subsamples of equal size, rotation shifts, in such a way that dwellings which belong to a certain rotation shift are renewed each quarter.

2º) The capture of the household (c) takes place prior to the quarter when effective collaboration with the survey begins, thus each family is present for 9 consecutive quarters with the following collaboration schema.

c G G g g G G g g

where G indicates that in that quarter the family lists all expenses and g indicates that in that quarter the family lists only the reference expenses exceeding a week.

In this way, of the eight dwellings selected in each quarter, 4 collaborate in G and 4 collaborate in g.

# 5. Basic concepts

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## A Household

The household and its members constitute the basic information collection and analysis units from the household budget survey for which reason the correct definition of household and household member is fundamental in order to ensure compliance with the objectives of this investigation.

The private household is defined as the person or persons who jointly occupy a *main family dwelling* or part of it, and consume and/or share food or other goods on the same budget.

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## B Household member

The conditions which are established to determine whether or not a person is a member of the household tries to avoid the possibility that the same individual may be classified in more than one household or, conversely cannot be classified in any.

Consequently, those persons who habitually live in the household surveyed and participate in the household budget (economic dependence), in other words, they share income or expenses with the rest of the persons who make up the household and are present in the household, are considered household members.

A *same budget* is considered to be the common fund that facilitates the housewife or person responsible for administration of the household to meet common household costs (telephone, water, electricity...). The simple division of expenses between residents is not considered participating in the common budget as this should also imply participating in household decisions.

*Living habitually* in the sample dwelling is understood to mean having lived at least 45 days in the last three months in the main household family dwelling and not having abandoned the household definitively for another main family dwelling or having incorporated into the household definitively.

Apart from persons who meet the aforementioned requirements, there is a series of persons who without meeting them are considered household members. These persons, included within the heading *special cases*, may be consulted in the methodology published by the INE.

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## C Main breadwinner

Main breadwinner *is* considered to be the household member, normally present in the household, whose periodical contribution (not temporary) to the common budget is used to meet household costs to a greater degree than the contributions of each one of the remaining members.

If the person who contributes more to meeting household costs normally lives outside the dwelling or has abandoned the household definitively, the main

breadwinner is considered to be the household member who habitually living in the household receives economic contributions to meet household expenses.

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## **D Study period and reference period**

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### **D.1 STUDY PERIOD**

The time interval to which the data is referred (in the case of HBS 1997 quarter or year) is called the *study period*.

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### **D.2 REFERENCE PERIOD**

The *reference period* means, for each type of good or service, the duration of time which corresponds to the expense for the good or service.

Not being possible to have a continued list of households over long time periods, different reference periods are introduced according to the frequency of purchasing the good or service or according to their monetary importance. Listing for the entire quarter is left only for goods whose frequency of purchase is very small or for a very high amount (more than 50,000 pesetas per good or service), reducing the period to one month for the following group of goods or services whose purchase by Spanish households is considered more frequent or if their unitary value is between 20,001 and 50,000 pesetas. The most frequent goods (mainly good from groups 1. *Food and non-alcoholic beverages* and 2. *Alcoholic beverages and tobacco*) will be listed only for a week.

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## **E Temporal elevation factors**

For all household expenses and income the so called temporal elevation factors are applied to them based on their reference periods. These factors should be applied due to being the study period which is in general different from all the expenses reference periods.

The temporal elevation factors may be included within just one factor, whose formulation is the following:  $f = T/t$ , where T is the study period (91 days for expenses) and t the respective reference period, both measured in number of days.

# 6. Main characteristic object of study: Household consumption expenses

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## 1 Concept

The *final household consumption* corresponds to the expenses made by all households in order to consume goods and services. This covers:

- Purchases made in cash.
- The estimated value for certain goods and services such as the value of self consumption products (both if they are consumed by the household and if they are given as gifts to other households), the value of products coming from self supply (when the household is the consumer), remuneration in kind by employers to their employees, imputed rents to home owners or those who enjoy them entirely or partially free of charge and free lunches and/or dinners given at work or in a catering establishment which is owned by the household.

The following are considered within consumption expenses:

- Expenses on domestic services produced by households for themselves, as employers of remunerated domestic personnel.
- Materials and labour for home repairs, major repairs (investment) and repairs that may only be made by the home owner (intermediate consumption).
- Payments made by households for licences, leave... that should be considered purchases of services provided by public administrations.
- Gifts bought by the household to be given to other households.

The following are not considered consumption expenses:

- Investments made by households (purchase of a house).
- Some levies and some taxes paid to public administrations.
- Savings, fines and surcharges.
- Monetary transfers to other households or institutions.
- The evaluation of presents received by households.
- Life insurance.

The different goods and services that make up consumption are classified in accordance with the harmonised COICOP/HBS classification which replaces the one used up until now (PROCOME).

This classification is an adaptation of the COICOP used by the National Accounting for the Household Budget Surveys.

Consumer expenses are considered to be those that the household makes as an economic consumer unit, not including therefore those made by the company or those for family use. This means that a distinction had to be made between expenses corresponding to the consumer unit and production in those cases when

the family company has common costs with the household (telephone, electrical energy, gas).

Given the objectives of the survey, gross costs will be collected; in other words the real amount of the expenses on goods and services plus any added expense that their purchase would have incurred (for example tips).

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## **2 Evaluation criteria**

In order to adjust as much as possible the concept of consumption defined by the National Accounts (NA), goods purchased by instalment will be evaluated by their cash value.

Goods should be registered when the change of ownership takes place and services when the provision of same is completed. Goods acquired on an instalment basis or a similar credit agreement (or by means of financial lease) are registered when the goods are delivered, although a change in legal ownership does not occur at this time.

The criterion for registration and evaluation that have just been mentioned are not the most appropriate for measuring the consumption of goods and services coming from self consumption, self supply, payment in kind and imputed rent, given that generally there is no change in ownership (goods) for these five modalities nor is any payment made for their acquisition.

So for self consumption, self supply and payment in kind the registration of the goods is generally carried out on consumption and the evaluation is carried out at local retail market prices.

Imputed rent is estimated based on self evaluation by the household of the rent that they consider should be paid for such a dwelling.

# 7. Variables

The variables used in the tabulation of results with which the data are disseminated are listed below.

All those variables that were requested in the investigation and which have not been used up until now, may be consulted in the survey methodology.

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## A Geographical characteristics

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### A.1 AUTONOMOUS COMMUNITY OF RESIDENCE

The 17 autonomous communities within national and Ceuta-Melilla are considered.

ANDALUCÍA: Almería, Cádiz, Córdoba, Granada, Huelva, Jaén, Málaga and Sevilla.

ARAGÓN: Huesca, Teruel and Zaragoza.

ASTURIAS (PRINCIPADO DE): Asturias.

BALEARES (ISLAS): Illes Balears.

CANARIAS: Las Palmas and Santa Cruz de Tenerife.

CANTABRIA: Cantabria.

CASTILLA AND LEON: Ávila, Burgos, León, Palencia, Salamanca, Segovia, Soria, Valladolid and Zamora.

CASTILLA-LA MANCHA: Albacete, Ciudad Real, Cuenca, Guadalajara and Toledo.

CATALUÑA: Barcelona, Girona, Lleida and Tarragona.

COMUNIDAD VALENCIANA: Alicante, Castellón and Valencia.

EXTREMADURA: Badajoz and Cáceres.

GALICIA: A Coruña, Lugo, Ourense and Pontevedra.

MADRID (COMUNIDAD DE): Madrid.

MURCIA (REGIÓN DE): Murcia.

NAVARRA (COMUNIDAD FORAL DE): Navarra.

PAIS VASCO: Álava, Guipúzcoa and Vizcaya.

RIOJA (LA): La Rioja.

CEUTA AND MELILLA (AUTONOMOUS CITIES).

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## A.2 SIZE OF MUNICIPALITY

The following classification is considered:

- Province capital municipality.
- Municipalities with 100,000 or more inhabitants.
- Municipalities with 50,000 to 100,000 inhabitants.
- Municipalities with 20,000 to 50,000 inhabitants.
- Municipalities with 10,000 to 20,000 inhabitants.
- Municipalities with less than 10,000 inhabitants.

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## A.3 POPULATION DENSITY

The classification used is the following:

- Densely populated areas is that set of contiguous municipalities which all have a density of more than 500 inhabitants per square kilometre and whose total population is more than 50,000 inhabitants.
- Intermediate area is that set of total municipalities which do not belong to a densely populated area. Each one of them has a density of more than 100 inhabitants per square kilometre and/or the total density of more than 50,000 inhabitants, or they are located next to a densely populated area, independently of the number of total inhabitants.
- Disseminated area is that set of contiguous municipalities which do not belong either to a densely populated area or an intermediate area.

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## **B Characteristics relative to household**

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### B.1 COMPOSITION OF HOUSEHOLD

The following classification is used:

- Households with one member.
- Households with two members.
- Households with three members.
- Households with four members.
- Households with five members.
- Households with six members or more.

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## B.2 TYPE OF HOUSEHOLD

The following classification is considered:

- Person alone under 65.
- Persons alone 65 or over.
- Couple without children (two household members which are a couple).
- Couple with a child (three household members, a couple and the child of at least one of them).
- Couple with two children (four household members, a couple and two by one or both members of the couple).
- Couple with three or more children (there are more than four members in the household, a couple and the rest exclusively children).
- An adult with children (an adult in the household and the rest children).
- Another type of household.

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## B.3 NUMBER OF EMPLOYED HOUSEHOLD MEMBERS IN THE WEEK PRIOR TO THE INTERVIEW

The following classification has been used:

- Without employed persons.
- One employed person.
- Two employed persons.
- Three employed persons.
- Four or more employed persons.

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## B.4 NUMBER OF EMPLOYED HOUSEHOLD MEMBERS IN THE LAST QUARTER

The classification has been the same as for the variable Number of employed household members in the last week.

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## B.5 NUMBER OF ACTIVE HOUSEHOLD MEMBERS IN THE NATURAL WEEK PRIOR TO THE INTERVIEW

Said variable has been broken down into:

- Without active persons.
- One active person.

- Two active persons.
- Three active persons.
- Four or more active persons.

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#### B.6 NUMBER OF ACTIVE HOUSEHOLD MEMBERS IN THE LAST QUARTER

Breakdown is the same as that used for the number of active household members in the natural week prior to the interview.

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#### B.7 ECONOMIC SITUATION OF THE HOUSEHOLD (EMPLOYED PERSONS) IN THE NATURAL WEEK PRIOR TO THE INTERVIEW

The following classification is considered:

- The main breadwinner and the spouse or partner are employed and at least one other household member is employed.
- The main breadwinner and the spouse or partner are employed and no other household member is employed.
- The main breadwinner or the spouse or partner are employed and at least one other household member is employed.
- The main breadwinner or the spouse or partner are employed and no other household member is employed.
- Neither the main breadwinner nor the spouse or partner are employed and at least another two household members are employed.
- Neither the main breadwinner nor the spouse or couple are employed and only another household member is employed.
- No household member is employed.

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#### B.8 ECONOMIC SITUATION OF THE HOUSEHOLD (EMPLOYED) IN THE LAST QUARTER

The classification is the same as for the economic situation in the last week.

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#### B.9 ECONOMIC SITUATION OF THE HOUSEHOLD (ACTIVE PERSONS) IN THE NATURAL WEEK PRIOR TO THE INTERVIEW

The following classification is considered:

- The main breadwinner and the spouse or partner are active and at least another of the household members is active.

- The main breadwinner and the spouse or partner are active and no other household member is active.
- The main breadwinner or the spouse or partner are active and at least another of the household members is active.
- The main breadwinner or the spouse or partner are active and no other household member is active.
- Neither the main breadwinner nor the spouse or partner are active and at least two other household members are active.
- Neither the main breadwinner nor the spouse or couple are active and only one other household member is active.
- No other household member is active.

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#### B.10 ECONOMIC SITUATION OF THE HOUSEHOLD (ACTIVE PERSONS) IN THE LAST QUARTER

The classification is the same as for the economic situation in the natural week prior to the interview.

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#### B.11 HOUSEHOLD INCOME

Regular net monthly household income is at present the income received regularly and at the time of the interview, by household members who receive any sort of income, once social security contributions, other similar payments and taxes have been discounted. Therefore, in the case of working for others, only wage tax on account should be withheld while in the case of freelance work, taxes withheld on account and fractioned income tax payments should be deducted.

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##### B.11.1 Level of monetary income

The monthly regular monetary income for all household members is considered.

The intervals considered are the following:

- Up to 65,000 ptas.
- From 65,001 to 130,000 ptas.
- From 130,001 to 195,000 ptas.
- From 195,001 to 260,000 ptas.
- From 260,001 to 325,000 ptas.

- From 325,001 to 390,000 ptas.
- From 390,001 to 650,000 ptas.
- Over 650,000 ptas.

---

#### B.11.2 Main source of income

The main source of household income is the highest after grouping the income received by different household members by type of income.

The following classification has been used to obtain the source of income.

- Freelance work.
- Work for others.
- Contributory and non-contributory pensions (retirement, invalidity, and widowhood...).
- Unemployment subsidies and benefits and other subsidies and regular social benefit (grants, family aid...).
- Property and capital income (rents, dividends, interest...) and other regular income.

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#### B.12 SUBJECTIVE VALUATION OF THE ECONOMIC SITUATION OF THE HOUSEHOLD

With the objective of measuring the degree of satisfaction of households with their economic situation, as well as the appreciation by the household of the possibility of saving, the following classifications are considered:

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##### B.12.1 Degree of difficulty making ends meet with the monthly net income received by the household

- With a lot of difficulty.
- With difficulty.
- With some difficulty.
- With some ease.
- With ease.
- With a lot of ease.

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B.12.2. Capacity for savings in relation to household income and expenses

- The household has been able to save some money.

The household has not been able to save money or has saved very little.

Household *saving* in a given period is considered to be that portion of income obtained during said period that has not been spent on the acquisition of consumer goods and services.

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B.12.3. Valuation on whether the current moment is the right moment to make important purchases.

- Yes, it is the right moment.
- It is neither the right or wrong moment.
- It is not the right moment.

The consideration of *important purchase* is at the discretion of the interviewee although it may be mentioned that purchases of durable consumer goods are considered as such (television, fridge, washing machine, furniture, cars...). The purchase of a house is not included due to this being an *investment*, not consumption.

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## C Characteristics relating to main breadwinner

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C.1 AGE

The main breadwinners are classified into one of the following age groups:

- Up to 25.
- Between 26 and 35.
- Between 36 and 45.
- Between 46 and 55.
- Between 56 and 60.
- Between 61 and 65.
- 65 and over.

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## C.2 SEX

Male

Female.

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## C.3. ACTIVITY SITUATION OF MAIN BREADWINNER IN THE NATURAL WEEK PRIOR TO THE INTERVIEW

The following classification is considered:

### **Employed**

Both persons that are working and those who have a job but temporarily absent from work are included in this section.

Persons who, during the reference week have worked *at least one hour* either in exchange for personal gain or family earnings in cash or in kind are considered to be working.

Family assistance, remunerated apprentices and workers on a remunerated public employment program are also included as working, as long as they have worked at least one hour during the reference week.

Persons who normally work but did not work during the reference week due to holidays, illness or accident, labour conflict, study leave, maternity..., disciplinary employment suspension, work organisation,...are considered to be employed but temporarily absent. Those suspended from their jobs because of an employment regulation are considered to be in this situation only when they expect to return to their jobs when the suspension is over.

### **Unemployed**

Persons who during the reference week *were without work, looking for work*, in other words those who have taken specific measures during the last 4 weeks in order to work for others or set themselves up as a freelancer and *are available to work* within two weeks from interview, are considered unemployed.

### **Retired**

Persons who do not work and draw a retirement pension, obtained because of their economic activity prior to them giving up work because of their age, are considered retired.

### **Other inactive persons**

Students, persons doing military service, housework and those in another situation are included in this paragraph.

Persons who received education at any training level are considered students.

Persons who are in a military service period (or equivalent service), even those who during the last week have been on leave from this service while they are still studying, are considered to be doing military service.

All those persons who are not included in any of the previous categories are considered to be in another situation, in particular the following: *independently wealthy* (persons who without exercising any remunerated or autonomous activity receive income from property and/or other investments); *incapacity to work*; persons *temporarily deprived of their freedom*, those who *without exercising economic activity, receive public or private aid*.

Persons who without exercising any economic activity, *spend their time caring for their own house* without any economic payment, are considered to be doing housework.

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#### C.4 ACTIVITY SITUATION OF THE MAIN BREADWINNER IN THE LAST QUARTER

The following classification is considered:

- Employed.
- Unemployed.
- Retired.
- Other inactive persons.

Students, persons doing military service, housework and those in another situation are included in this paragraph.

- More than one situation.

Persons who have not remained in the same situation over the whole quarter are considered here.

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#### C.5 OCCUPATION, PROFESSION OR TRADE CARRIED OUT (ONLY FOR THOSE WHO WERE CLASSIFIED AS EMPLOYED IN THE WEEK PRIOR TO THE INTERVIEW).

Occupation on a NCO 94 one-digit level have been considered in the table. The armed forces have been deleted from the corresponding heading since there are not enough observations in the sample.

In agreement with said classification, the main breadwinners, whose situation in the natural week prior to the interview was working or with a job but not working, have been classified into one of the following headings:

- Management of companies and Public Administration.
- Scientists and intellectual professionals and technicians.
- Technicians and support professionals.

- Administrative employees.
- Catering, personal, protection and business vendor services employees.
- Employees qualified in agriculture and in fishing.
- Craftspersons and employees qualified for the manufacturing, construction, and mining industries, except installation and machinery operators; workers qualified in extractive industries, metallurgy, construction of machinery etc; qualified workers from the graphic arts, textile and preparation, elaboration of food, cabinet-makers, craftspersons and other similar industries.
- Operators and assemblers of facilities and fixed machinery and drivers and operators of mobile machinery.
- Unqualified workers.

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#### C.6 PROFESSIONAL SITUATION

The main breadwinners who were employed under one of the following headings in the natural week prior to the interview have been classified:

- Employer.
- Businessperson without employees.
- Employee.

The following categories have not been included in the tables due to lack of sample:

- Family Assistance.
- Remunerated apprentice.
- Another Situation.

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#### C.7 LEVEL OF FINISHED STUDIES (SEE ANNEX)

This characteristic refers to the highest level of studies completed by the main breadwinner. A breakdown on a CINE two-digit level was used for the coding of this variable. However the variable used in this publication is grouped as follows:

- Without studies and illiterate.
- Primary education.
- Secondary education, first cycle (includes secondary education, first cycle, general and professional).
- Secondary education, second cycle (includes secondary education, second cycle, general and technical professional).

- Non-university higher education. (Non-university higher education and other third level education, first and second cycle).
- First cycle university studies (first cycle university education).
- Second and third cycle university studies (second and third cycle university education).

NOTE: Due to not having the sufficient number of observations for special education and adult education categories not defined by the degree, these two categories have not been considered in the elaboration of the tables.

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## **D Other characteristics**

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### **D.1 NUMBER OF CONSUMPTION UNITS**

The calculation of consumer units according to the OECD scale is carried out based on the sum of the household members weighted by the following coefficients.

- 1 for the main breadwinner.
- 0,7 for the following household adults (persons over 13).
- 0,5 for children (13 and under).

In the case of the modified OECD scale the coefficients are the following:

- 1 for the main breadwinner.
- 0.5 for the following household adults.
- 0.3 for children.

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### **D.2 REAL EXPENSES**

Real expenses is understood to be the monetary flow from the household for the acquisition of consumer goods and services. Therefore, the value imputed to goods received in kind for self consumption, self supply and payment in kind, the value imputed to free meals at work or catering establishments owned by the household and the value imputed to the dwelling in which the household lives, when the owner has ceded the dwelling free of charge or semi free of charge to other households or institutions, are not included as expenses.

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### **D.3 AVERAGE EQUIVALENT EXPENSE PER HOUSEHOLD**

Average equivalent expenses by household is understood to be the average by household of average expenses by consumption unit. In order to obtain this, the

average expense per consumption unit is calculated for each sample household. Each one of the households that the sample household represents in the population is assigned this average expense and the average expense per household is calculated from average expense per consumer unit.

The scale used for the calculation of consumption units was the OECD scale.

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#### D.4 AVERAGE EQUIVALENT EXPENSE PER PERSON

Equivalent average expenses per person is understood to be the average per person of the expenses per consumer unit associated with each household member. In order to obtain this the average expense per consumer unit is calculated in each sample household. Each individual from the household is assigned the average expense calculated and the average expense per person of average expenses per consumer unit is estimated for the population.

The scale used for the calculation of consumption units was the OECD scale.

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#### D.5 INDICES OF VARIATION IN AVERAGE QUARTERLY EXPENSES BY HOUSEHOLD

They are obtained in each quarter based on 1<sup>o</sup> from 1999 both for tables in current and constant pesetas and are defined for a quarter t as follows:

##### **Index of average expenses by household on the previous quarter:**

Average expenses by household for quarter t.  
\_\_\_\_\_ \* 100

Average expenses by household for quarter t-1

(in the case where t = 1, t-1 will be the 4th quarter from the previous year)

##### **Average expenses index by household on the base quarter (1st quarter of 1998):**

Average expenses by household for quarter t  
\_\_\_\_\_ \* 100

Average expenses by household for 1st quarter 1998.

##### **Index of average expenses by household on the same quarter of the previous year:**

Average expenses by household for quarter t year a.  
\_\_\_\_\_ \* 100

Average expenses by household for quarter t year a-1.

**Accumulated over the year on the same quarter of the previous year:**

$$\frac{\sum_{i=1}^t \text{gastomedio porhogar}_i (\text{año}a)}{\sum_{i=1}^t \text{gastomedio porhogar}_i (\text{año}a - 1)} * 100$$

---

#### D.6 EXPENSES DECILES

The construction of expenses deciles has been carried out in the following manner:

Persons have been ordered in order of increasing age in accordance with average expenses per person. The first decile (first inter decile interval) corresponds to 10% of persons with less average expenses per person, the second made up of the 10% of persons who have less expenses per person once persons from the first decile have been eliminated and thus successively. The 10% of persons with greater average expense per person corresponds to decile 10.

For the calculation of average expenses per consumption unit by expenses deciles, the OECD scale has been used.

# 8. Methodological changes introduced in the HBS

The following tries to provide a vision of the most important changes that have been introduced in the new household budgets survey in relation to the previous continuous survey. Among other objectives, the aim is to facilitate comprehension of certain variations in the estimate of expenses and the construction of income obtained in the survey in relation to the preceding HBS.

Therefore, we can quote the following as the most important methodological changes.

---

## 1 Degree of collaboration by household

Different degree of collaboration by household according to survey quarter. Therefore, during collaboration with the INE households will remain 4 quarters in *large G* (providing during this time the same information on weekly reference goods and on the rest of goods) and 4 quarters in *small g* (providing information just on the acquisition of goods and services with periodicity greater than the week). Moreover, there is an initial contact with the household, *c capture* prior to complete collaboration. Specifically, for a certain household, the situation with respect to the survey is the following:

c G G g g G G g g

The degree of collaboration requested in the continuous survey base 1988 was the same for all quarters. The workload is reduced with the new survey.

---

## 2 Expenses reference period

In contrast to the previous survey and in an attempt to reduce sample error, the reference periods depend not only on the goods or service but also on their amount. Thus there may be more than one period for the same type of goods or service.

---

## 3 Criteria used to register annotations

The criteria for listing goods and services is acquisition, that is, goods and services are listed when they are acquired (avoiding errors due to forgetfulness and the telescopic effect inherent to HBS per se, generally retrospective with respects to the record of the data) and by their cash price, independently of whether payment has been made in cash or on an instalment basis. Traditionally, household budget surveys used payment criteria, that is, goods and services were listed when a payment was made, and the value of the goods and services was recorded.

---

#### **4 Structure of the survey**

The survey has a modular structure. Subject modules (income, equipment...) may be incorporated during the periods of least collaboration from the household (small g), which cover shortcomings existing in the statistical information system.

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#### **5 Enlargement of sample size**

Considerable enlargement of the first stage units investigated in relation to the HBS 1985, changing from 584 to approximately 1000 which leads to a more enriched sample.

The second stage units have also been enlarged from 3200 dwellings a quarter to 4000 in large G and 4000 in small g.

Moreover, there has been a change in section with respect to the one used in the previous survey.

---

#### **6 Population investigated**

The population investigated in the survey has been enlarged. Not only household members are investigated but also resident domestic servants and guests in family bed and breakfasts as long as their number is less than 6.

---

#### **7 Classification of consumption expenses**

Use of the new classification, COICOP/HBS, classification of household consumption expenses. The correspondence between the former classification (PROCOME) and the current one may be studied in Annex 1.

---

#### **8 Income**

Obtaining income on a household level and not independently for each one of its members.

The income that is covered corresponds to the regular household monthly net income. Information on non-monetary income is not provided.

This leads to using income mainly as a classification variable. It is foreseen that an income module will be introduced over successive years that facilitates the individualised collection of income from all household members and obtaining the disposable income of same.

---

## **9. Demographic, economic and social variables of household members.**

The number of variables requested has been enlarged considerably for each one of the individuals who result in being household members.

# 9. Comparison of classification variables between HBS 1985 and HBS 1997

The classification variables that were used in the HBS 1985 are listed below. Comparing them with the variables that appear in section 7, classification variables, the differences between the two surveys can be studied.

---

## A Size of municipality

- Municipalities up to 10.000 inhabitants.
- Municipalities with between 10,000 and 50,000 inhabitants (excluding province capitals).
- Municipalities with between 50,001 and 500,000 inhabitants (including province capitals).
- Municipalities with more than 500.000 inhabitants.

---

## B Composition of household

- member households.
- Households with six members or more.

---

## C Type of household

- Person alone under 65.
- Person alone over 65.
- Couple without children<sup>1</sup>.
- Couple with a child<sup>1</sup>.
- Couple with two children<sup>1</sup>.
- Couple with three or more children<sup>1</sup>.
- Adults with children<sup>1</sup>.
- Another type of household.

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<sup>1</sup> A child is considered to be a person under 14.

---

## **D Household income**

1. Income working for others.
2. Freelance income.
3. Capital and property income.
4. Pensions (only contributory).
5. Unemployment benefit (includes subsidies).
6. Other regular transfers (including non-contributory pensions and other social subsidies and benefits not mentioned above, transfers between household and income from insurance companies...).
7. Other monetary income (includes extraordinary income).
8. Monetary income which cannot be broken down.

---

## **E Relationship of the main breadwinner with economic activity the natural week prior to the interview**

1. Works at least 1/3 of the normal working day.
2. Works less than 1/3 of the normal working day (does not include persons who work as family help).
3. Unemployed.
4. Retired (including persons who without having carried out prior labour activity receive a pension, for example for widowhood).
5. Persons dedicated exclusively to housework.
6. Others (include persons doing military service, family help that work less than 1/3 of a working day, students and others).

When a person is found in more than one situation they will be classified in the one which has a lesser code associated to it. This may lead to classifying the same person differently in one survey or another.

---

## **F Socio-economic situation and category**

1. ACTIVE POPULATION
  - 1.1. Unemployed who are looking for work.

## 2. EMPLOYED

2.1. Businesspersons with employees and freelance workers.

2.2. Businesspersons without employees and members of co-operatives.

2.3. Agrarian workers.

2.4. Non-agrarian businesspersons without employees and independent workers.

2.5. Directors, upper and intermediate ranks and officers of the armed forces.

2.6. Rest of personnel, specialised workers, non-commissioned officers and classes in the armed forces.

2.7. Non-agrarian workers without specialisation.

## 3. NON-ACTIVE PERSONS

---

### **G Level of studies**

1. Illiterate.

2. Without studies (includes adult literacy and general adult education without any level).

3. First degree education (includes professional initiation).

*1+2+3 = First degree education, without studies or illiterate.*

4. Secondary education, first cycle (includes ecclesiastical studies (humanities), agrarian capability, accelerated professional training, applied arts artistic professions and ceramics, auxiliary assistants...).

*4 = Secondary education, first cycle*

5. Secondary education, second cycle (includes second degree professional training, university entrance test for over 25s, non-commissioned officers...).

*5 = Secondary education, second cycle*

6. University education, first cycle (includes ecclesiastical studies (philosophy), physical education teachers...).

*6 = University studies, first cycle*

7. University education, second and third cycle.

*7 = Second and third cycle university studies and non-university advanced studies*

NOTE: The classification used in the HBS 1997 tables appears in Italics. Existing differences between both surveys that make data comparison difficult are in brackets.

---

## **H Classification of consumption expenses**

Consumer costs were classified according to a classification elaborated by the INE that was supported by the one used in EUROSTAT for Household Budget Surveys, based on the PROCOME classification to two digits from the European Economic System of Integrated Economic Accounts (ESA).

Currently the new international COICOP/HBS classification is used for final household consumer expenses for Household Budget Surveys.

The correspondence between PROCOME and the COICOP/HBS on a 3 digit level may be seen in the Annexes.

# Annex 1

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## Classification of COICOP/HBS goods and services

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### GROUP 01. FOOD AND NON-ALCOHOLIC BEVERAGES

#### 01.1 FOOD PRODUCTS

Food products generally purchases in order to be consumed at home are classified here.

#### 01.2 NON-ALCOHOLIC BEVERAGES

Non-alcoholic beverages generally purchased to be consumed at home are classified under this heading.

#### 01.3 MAIN SHOPPING TRIP

The purchase of various products (food, beverages, drug articles and other small household purchases), carried out with periodicity greater than a week and which serve to supply the household during a period of time.

#### 01.4 EXPENSES WHICH CANNOT BE BROKEN DOWN INTO FOOD AND NON-ALCOHOLIC BEVERAGES

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### GROUP 02. ALCOHOLIC BEVERAGES, TOBACCO AND NARCOTICS

#### 02.1 ALCOHOLIC BEVERAGES

Alcoholic beverages purchased to be consumed at home are classified here.

#### 02.2 TOBACCO

Tobacco purchased, independently of the place of purchase is classified here.

#### 02.3 NARCOTICS

#### 02.4 EXPENSES THAT CANNOT BE BROKEN DOWN INTO ALCOHOLIC BEVERAGES, TOBACCO AND NARCOTICS

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### GROUP 03. CLOTHING AND SHOES

#### 03.1 CLOTHES

#### 03.2 SHOES

#### 03.3 EXPENSES THAT CANNOT BE BROKEN DOWN INTO CLOTHES AND SHOES

---

GROUP 04. HOUSING, WATER, ELECTRICITY, GAS AND OTHER FUELS

04.1 REAL RENTS

Payments made for the use of a garage normally reserved for the occupants of the dwelling, even if this garage is located outside the building in which the dwelling is located or if the garage owner is different from the dwelling owner, are included within rents.

04.2 IMPUTED RENTS

04.3 HOUSING MAINTENANCE AND REPAIR COSTS

This includes expenses made by lodgers or by the owner occupiers for the acquisition of materials and services destined for repair and maintenance of the dwelling.

04.4 OTHER SERVICES RELATED TO THE DWELLING

04.5 ELECTRICITY, GAS AND OTHER FUELS

04.6 EXPENSES THAT CANNOT BE BROKEN DOWN INTO HOUSING, WATER, ELECTRICITY, GAS AND OTHER FUELS

---

GROUP 05. FURNITURE, HOUSEHOLD EQUIPMENT AND CURRENT MAINTENANCE COSTS FOR THE DWELLING.

05.1 FURNITURE, FURNISHINGS, RUGS AND OTHER FLOOR COVERINGS AND THEIR REPAIR

05.2 TEXTILE ARTICLES FOR THE HOUSEHOLD AND REPAIRS

05.3 HEATING AND KITCHEN EQUIPMENT, FRIDGES, WASHING MACHINES AND OTHER LARGE ELECTRICAL APPLIANCES, ACCESSORIES AND REPAIRS

05.4 GLASSWARE, DINNER SERVICE, HOUSEHOLD UTENSILS AND THEIR REPAIRS

05.5 HOUSE AND GARDEN TOOLS

05.6 GOODS AND SERVICES FOR THE CURRENT MAINTENANCE OF THE HOUSEHOLD

05.7 EXPENSES THAT CANNOT BE BROKEN DOWN INTO FURNITURE, HOUSEHOLD EQUIPMENT AND CURRENT HOUSEHOLD MAINTENANCE COSTS

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GROUP 06. HEALTH

06.1 DRUGS AND OTHER PHARMACEUTICAL PRODUCTS, EQUIPMENT AND THERAPEUTIC MATERIAL

Drugs, prostheses, therapeutic material and equipment and other health care products purchased in pharmacies or therapeutic material shops etc. are included in this group.

06.2 MEDICAL SERVICES AND SUPPLEMENTARY HOSPITAL PARAMEDICS

All medical, dental and paramedic services provided to patients by doctors, dentists, paramedic professionals and medical auxiliaries will be registered in this subgroup.

Drugs, prostheses and therapeutic material and other products provided to patients by practitioners and auxiliaries, payments for biological and radiological examinations made in analysis and radiology laboratories are also included. Payments received, by doctors and dentists, for the interpretation of X-rays and analysis.

Payments for medical (such as cardiological and echo examinations) or radiological (mainly dental) examinations are included when they are carried out directly by doctors and dentists.

#### 06.3 HOSPITAL SERVICES

Services provided by rehabilitation centres that provide care mainly in functional rehabilitation, when the objective is to look after the patient and not to ensure long term care, are registered here.

Drugs, prostheses, therapeutic material and equipment and other health related products provided to hospitalised patients are also included. Similarly expenses that are not strictly medical such as administration expenses, non-medical personnel costs, catering and accommodation costs, are included.

#### 06.4 EXPENSES THAT CANNOT BE BROKEN DOWN INTO HEALTH

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### GROUP 07. TRANSPORT

#### 07.1 PURCHASE OF VEHICLES

#### 07.2 USE OF PERSONAL VEHICLES

This includes the purchase of automobile components and spare parts to be used by the household for the repair or maintenance of vehicles. If the repair or revision of a vehicle is carried out in a workshop, this includes both the service expenses and the materials used.

#### 07.3 TRANSPORT SERVICE

The acquisition of transport services is classified according to type of transport. When the same ticket covers two or more transport models (for example, bus, city bus, intercity metro or train, barge) without being able to distinguish which cost corresponds to each means of transport, classification will be based on the main type of means of transport measured by distance.

School transport is included in this heading.

#### 07.4 EXPENSES THAT CANNOT BE BROKEN DOWN INTO TRANSPORT

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GROUP 08. COMMUNICATIONS

08.1 COMMUNICATIONS

08.2 EXPENSES THAT CANNOT BE BROKEN DOWN INTO COMMUNICATIONS

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GROUP 09. LEISURE, PERFORMANCES AND CULTURE

09.1 AUDIOVISUAL, PHOTOGRAPHIC AND INFORMATION PROCESSING EQUIPMENT AND ACCESSORIES, INCLUDING REPAIRS

09.2 OTHER IMPORTANT DURABLE GOODS FOR LEISURE AND CULTURE

09.3 OTHER RECREATIONAL ARTICLES AND EQUIPMENT; FLOWERS, GARDENING AND PETS

09.4 RECREATIONAL AND CULTURAL SERVICES

09.5 PRESS, BOOKSHOPS AND STATIONERY

09.6 ALL INCLUSIVE HOLIDAYS

09.7 EXPENSES THAT CANNOT BE BROKEN DOWN INTO LEISURE, PERFORMANCES AND CULTURE

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GROUP 10. TEACHING

10.1 TEACHING SERVICE

Education services are exclusively included here without taking into account costs for school material, books, manuals..., stationery articles or complementary education services such as health, transport, accommodation in boarding schools, universities and other educational establishments and services in school and university canteens.

10.2 EXPENSES THAT CANNOT BE BROKEN DOWN INTO EDUCATION

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GROUP 11. HOTELS, CAFES AND RESTAURANTS

11.1 RESTAURANTS AND MEALS OUTSIDE THE HOME

11.2 ACCOMMODATION SERVICES

11.3 EXPENSES THAT CANNOT BE BROKEN DOWN INTO HOTELS, CAFES AND RESTAURANTS

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GROUP 12. OTHER GOODS AND SERVICES

12.1 PERSONAL CARE

12.2 PERSONAL EFFECTS NOT DECLARED PREVIOUSLY

### 12.3 SOCIAL PROTECTION

Social protection is understood to be services provided to adults, disabled persons, workers who have been the victims of accidents at work or professional illness, unemployed and others (poor people, people without a fixed address, immigrants, refugees, drug addicts, alcoholics,...).

### 12.4 INSURANCE SERVICES

Multi risk insurance commissions cover various risks that cannot be classified separately; for this type of insurance if it is impossible to classify commissions between the different risks covered, classification may be carried out based on the main risk.

### 12.5 FINANCIAL SERVICES NOT DECLARED IN ANOTHER SECTION

### 12.6 OTHER SERVICES NOT DECLARED PREVIOUSLY

### 12.7 POCKET MONEY TO MINORS RESIDENT IN THE HOUSEHOLD

### 12.8 TRANSFERS TO HOUSEHOLD MEMBERS NOT RESIDENT IN THE DWELLING

### 12.9 EXPENSES NOT BROKEN DOWN INTO OTHER GOODS AND SERVICES

# Annex 2

## Relationship between COICOP/HBS and PROCOME

Coicop code		Procome code
01.1.1	Bread and cereals	111 (part), 112 (part), 113 (part)
01.1.2	Meat	112 (part)
01.1.3	Fish	112 (part), 113 (part)
01.1.4	Milk, cheese and eggs	114 (part)
01.1.5	Oils and fats	110 (part), 115
01.1.6	Fruit	116 (part)
01.1.7	Vegetables, including potatoes and other tubercles	116 (part), 117 (part) 110 (part), 114 (part) 116 (part)
01.1.8	Sugar, jams, honey, chocolate and cakes	118
01.1.9	Food products not included previously	110 (part), 111 (part), 112 (part), 113 (part), 116 (part)
01.2.1	Coffee, tea, cocoa	110 (part), 119
01.2.2	Mineral water, aerated drinks and juice	110 (part), 116 (part), 121 (part)
01.3.1	Main shopping trip	For HBS85 this appears broken down into the goods that make up the main shopping trip.
01.4.1	Expenses that cannot be broken down into food and non-alcoholic beverages	100 (part)
02.1.1	Spirits and liquors	121 (part), 131 (part)
02.1.2	Wines	116 (part), 131 (part)
02.1.3	Beer	121 (part), 131 (part)
02.2.1	Tobacco	141, 142
02.3.1	Narcotics	---
02.4.1	Expenses that cannot be broken down into alcoholic beverages, tobacco and narcotics	100 (part)
03.1.1	Fabrics	211 (part)
03.1.2	Clothes	211 (part) 211 (part), 441 (part), 713 (part)
03.1.3	Other accessories and clothing articles	211 (part), 212
03.1.4	Maintenance, cleaning and rental of clothes	221 (part), 451 (part)
03.2.1	Shoes and other type of footwear	221 (part), 222
03.2.2	Maintenance and rental of footwear	210, 220
03.3.1	Expenses that cannot be broken down into clothes and footwear	
04.1.1	Real rentals	311 (part), 623 (part)
04.1.2	Real rentals (main dwell-ing)	311 (part), 623 (part)
04.1.3	Other rentals	
04.2.1	Rentals imputed to the dwelling in property	311 (part), 623(part)
04.2.2	Other imputed rentals	311 (part)
04.3.1	Materials for maintenance and current repair of the dwelling when the repair is carried out by the household itself	311 (part)
04.3.2	Services for maintenance and current repairs of the dwelling	311 (part)
04.3.3	Materials for investment (major renovations of the dwelling)	---
04.3.4	Services for investment (major renovations of the dwelling)	---
04.3.5	Materials for intermediate consumption by the	311 (part)

04.3.6	dwelling Services for intermediate consumption by the dwelling	311 (part)
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Coicop code		Procome code
04.4.1	Rubbish collection services	311 (part)
04.4.2	Sewage services	311 (part)
04.4.3	Water distribution	311 (part), 312 (part)
04.4.4	Other services related to the dwelling	311 (part), 452 (part), 623 (part), 714 (part)
04.5.1	Electricity	321
04.5.2	Gas	322
04.5.3	Liquid fuels	323
04.5.4	Solid fuels	324 (part)
04.5.5	Heating, central heating water, steam and ice	312 (part), 324 (part)
04.6.1	Expenses not broken down in housing, water, electricity, gas and other fuels	---
04.7.1	IBI (Building tax) second dwelling	311 (part)
05.1.1	Furniture and furniture articles	411 (part), 421 (part), 441 (part), 713 (part)
05.1.2	Rugs and other floor coverings	411 (part)
05.1.3	Repair of furniture, furniture articles and floor coverings	412
05.2.1	Textile articles for the household and their repairs	211 (part), 411 (part), 421 (part), 422, 452 (part), 812 (part)
05.3.1	Main electrical appliances whether electrical or not	431 (part)
05.3.2	Small electrical domestic appliances	422, 452 (part), 812 (part)
05.3.3	Repairs and accessories for all household equipment	432
05.4.1	Glassware, dinner services, household utensils and their repair	441 (part), 442 (part), 444, 451 (part), 822 (part)
05.5.1	Main electrical tools and their repairs	431 (part), 442 (part), 712 (part)
05.5.2	Small tools and various accessories and their repairs	421 (part), 441 (part), 442 (part), 451 (part)
05.6.1	Non durable articles for the household	451 (part), 621 (part), 823 (part)
05.6.2	Domestic services and other services for the dwelling	211 (part), 452 (part), 461
05.7.1	Expenses not broken down into furniture, household equipment and current costs for conserva	420, 440
06.1.1	Medical products, apparatus and equipment	511, 521 (part), 531 (part)
06.2.1	Medical services	531 (part)
06.2.2	Dental services	531 (part)
06.2.3	Non-hospital paramedic services	521 (part), 531 (part)
06.3.1	Hospital services	531 (part), 541
06.4.1	Expenses that cannot be broken down into health	500
07.1.1	Automobiles	611
07.1.2	Motorcycles	612 (part)
07.1.3	Bicycles	612 (part)
07.2.1	Purchase of spare parts and accessories for personal vehicles for repairs carried out by members of the household	621 (part)
07.2.2	Fuels and lubricants	622
07.2.3	Maintenance and repairs	621 (part), 623 (part)
07.2.4	Other services relating to personal vehicles	623 (part)

07.3.1	Rail transport (urban, inter-city and long distance trains, subway, tram, etc.)	631 (part), 632 (part)
07.3.2	Road transport (local and long distance)	631 (part), 632 (part), 741 (part)

Coicop code		Procome code
07.3.3	Air transport	632 (part)
07.3.4	Transport of passengers by sea and domestic waterways	632 (part)
07.3.5	Other transport services	631 (part), 633
07.4.1	Expenses not broken down into transport	620
08.1.1	Postal services	641
08.1.2	Telephone and fax equipment	642 (part)
08.1.3	Telephone, telegraph and fax services	642 (part)
08.2.1	Expenses not broken down into communications	---
09.1.1	Receiver and register equipment and sound and image reproducers	711, 713
09.1.2	Photographic and cinematographic equipment; optical instruments	712 (part)
09.1.3	Information treatment material	712 (part), 713 (part)
09.1.4	Support for imaging and sound registry	713 (part)
09.1.5	Repair of equipment and audiovisual, photographic and information processing accessories	712 (part), 713 (part), 714 (part)
09.2.1	Other important durable goods for leisure and culture	714 (part)
09.2.2	Repair of other goods leisure and culture	211 (part), 712 (part), 713 (part), 741 (part), 823 (part)
09.3.1	Games, toys and hobbies; equipment for sports and open air entertainment	431 (part)
09.3.2	Gardening and flowers	421 (part), 713 (part)
09.3.3	Domestic animals	421 (part), 713 (part)
09.4.1	Recreational and sports services	631 (part), 722 (part), 741 (part)
09.4.2	Cultural services	721 (part), 722 (part)
09.4.3	Gaming	923 (part)
09.5.1	Books	731 (part), 741 (part)
09.5.2	Press	731 (part)
09.5.3	Various printed publications	731 (part)
09.5.4	Stationery and painting materials	713 (part), 741 (part), 823 (part)
09.6.1	All inclusive holidays	841
09.7.1	Expenses that cannot be broken down into leisure, performances and culture	---
10.1.1	Child education, pre-school education and primary education	741 (part)
10.1.2	Secondary education	741 (part)
10.1.3	Higher education	741 (part)
10.1.4	Education not defined by degree	741 (part)
10.2.1	Expenses not broken down into education	---
11.1.1	Restaurants and cafés	111 (part), 113 (part), 831 (part)
11.1.2	Canteens and dining rooms	741 (part), 831 (part)
11.2.1	Accommodation services	741 (part), 832
11.3.1	Expenses that cannot be broken down into hotels, cafés and restaurants	800 (part)

12.1.1	Hairdressing and personal aesthetics	811
12.1.2	Apparatus, articles and products for personal care	441(part), 451 (part), 511(part), 812
12.1.3	Other personal care services	---
12.2.1	Jewellery, imitation jewellery and clocks and watches	421 (part), 821, 822 (part)
12.2.2	Other personal effects	822 (part), 923 (part)
12.3.1	Social protection services	741 (part), 861 (part)

<b>Coicop code</b>		<b>Procome code</b>
12.4.2	House insurance	452 (part), 921 (part) 921 (life insurance)
12.4.3	Health-related insurance. Health and accident insurance	551
12.4.4	Transport insurance	623 (part), 633 (part)
12.4.5	Other insurance	921 (part)
12.4.6	Burial insurance	861 (part)
12.5.1	Financial services not declared previously	851, 861 (part)
12.6.1	Other services not declared previously	741 (part), 861 (part), 911 (part), 923 (part), 924 (part)
12.7.1	Pocket money for children resident in the household	922 (part)
12.8.1	Transfers to household members not resident in the household	923 (part)
---		923 (occasional and regular transfers to other households)
---		924 (transfers to non-profit making institutions)
12.9.1	Expenses that cannot be broken down into other goods and services	800 (part)

# Annex 3

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## PROCOME codes

111	Bread and cereals
112	Meat
113	Fish
114	Milk, cheese and eggs
115	Oils and fats
116	Fruit and vegetables, except potatoes and other tubercles
117	Potatoes, tapioca and other tubercles
118	Sugar
119	Coffee, tea, cocoa
110	Other food products
121	Non-alcoholic beverages
131	Alcoholic beverages
100	Expenses that cannot be broken down into food and beverages
141	Cigarettes
142	Other tobacco
211	Clothes and dress accessories
212	Repair of clothes dress articles
210	Expenses that cannot be broken down into clothes
221	Footwear
222	Footwear repair
220	Expenses that cannot be broken down into footwear
311	Housing
312	Water distribution expenses
321	Electricity
322	Gas
323	Liquid fuels
324	Solid fuels and group heating
411	Furniture and fixed accessories, rugs and other floor coverings
412	Repair of furniture and fixed accessories, rugs and other floor coverings

- 421 Textile articles and other household furnishings
- 422 Repair of textile articles and other household furnishings
- 420 Expenses that cannot be broken down into textiles for the household and other furnishings
- 431 Heating and kitchen apparatus, fridges, washing machines and other large household appliances including their installation
- 432 Repair of heating and kitchen apparatus, fridges, washing machines and other large household appliances
- 441 Glassware, dinner service and household utensils
- 442 Repair of glassware, dinner service and household and garden utensils
- 440 Expenses not broken down into glassware, dinner service and household and garden utensils
- 451 Non-durable household articles
- 452 Household Services, except domestic services
- 461 Domestic service
- 511 Medicines and other pharmaceutical products
- 521 Therapeutic apparatus and other material
- 531 Medical services, nurses and other health services
- 541 Hospital and similar care
- 551 Remuneration of insurance services for accidents and illnesses
- 500 Expenses that cannot be broken down into medical and health maintenance services
- 611 Automobiles
- 612 Other means of personal transport
- 621 Tyres, air chambers, components and accessories and repair costs
- 622 Fuels, lubricants
- 623 Other expenses
- 620 Expenses that cannot be broken down into use of vehicles
- 631 Local transport
- 632 Long distance transport
- 633 Other expenses linked to the transport service
- 641 Postal service

642	Telephone and telegraph service
711	Radio and television apparatus and electrophones
712	Photographic material, musical instruments, boats and other goods
713	Other recreational articles
714	Components, accessories and repair of recreational articles
721	Expenses on cinema, theatres, stadiums and other similar performances
722	Other leisure services expenses
731	Books, newspapers and magazines
741	Teaching
811	Hairdressers, beauty institutes and the like
812	Personal care articles
821	Jewellery, watches, rings and precious stones, including repairs
822	Other personal articles
823	Stationery and art material and objects
831	Expenses in restaurants, cafés and hotels
832	Expenses in hotels and similar accommodation services
841	All inclusive tourist trips
851	Financial services not declared in another section
861	Other services not declared in another section
800	Expenses that cannot be broken down corresponding to this group
911	Taxes on animals; hunting, fishing permits and other taxes
921	Gross insurance premiums
922	Children's pocket money
923	Various costs
924	Voluntary contributions, transfers to non-profit making institutions,...

# Annex 4

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## Classification of level of studies finished

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### 01 EDUCATION PRIOR TO PRIMARY.

- Illiterates.

Illiterates are considered to be those persons 10 and over who:

- Cannot read or write.
- Can read but cannot write.
- Can read and write only one or a few phrases they recall from memory.
- Can read and write only a number or their own name.
- Without studies.

Persons who have attended school for less than 5 years (without considering pre school years or pre primary education) and are literate (capable of reading, writing and understanding a brief and simple account of every day life) are included in this section.

- Pre-school education.
- Pre primary education.

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### 02 PRIMARY EDUCATION.

- New system primary education (6 to 12).
- Attendance for at least 5 years at school.
- Basic general education, initial and intermediate cycle.
- Primary studies certificate.
- General culture.

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### 03 1<sup>ST</sup> CYCLE, SECONDARY EDUCATION. GENERAL EDUCATION.

- First year of GCSE or equivalent.
- Basic general education (3 complete cycles 1<sup>o</sup> to 8<sup>o</sup>).
- Complete obligatory secondary education (OSE).
- School Graduate.
- Educational Certificate.

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04 SECONDARY EDUCATION, 1<sup>ST</sup> CYCLE. PROFESSIONAL EDUCATION.

- Music and dance (elementary level).

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05 2<sup>ND</sup> CYCLE, SECONDARY EDUCATION. GENERAL EDUCATION.

Upper sixth (with or without pre university or university orientation course).

- 'O' Level (with or without university orientation course).
- Reform of intermediate education.
- EGSO (new system).
- Ecclesiastical studies (six humanities courses with two in philosophy).

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06 2<sup>ND</sup> CYCLE, SECONDARY EDUCATION. TECHNICAL-PROFESSIONAL EDUCATION.

- Primary professional training (PTI).
- Agrarian capability:
  - Rural instructor.
  - Corporate administrative assistant.
  - First level of intermediate command.
  - Other regulated studies equivalent for all intents and purposes to PTI.
- Experimental professional training plan (Professional Modules II).
- Specific intermediate professional training (EGSO).
- Mercantile expert.
- Industrial professions.
  - Second level, intermediate command.
- Plastic arts and artistic professions intermediate training cycles.
  - Intermediate singing studies: singing diploma.
  - Intermediate dance and music prior to the EGSO: instrument's diploma, teacher qualification.
- Ceramic: Graduate in ceramics in the Madrid faculty. Expert in Manises ceramic art and expert in Manises ceramic techniques.
  - Graduate in applied arts and artistic professions.

- Official Languages School.
- Dramatic art prior to the EGSO.

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#### 07 NON-UNIVERSITY HIGHER EDUCATION.

- Industrial teacher or specialist technician.
- Experimental professional training plan (Professional modules III).
- 2nd level professional training (PTII)
- Advanced level specific professional training (EGSO).
- Light aircraft pilot.
- Flight instructor.
- Navigator.
- Plastic arts and design experimental plan (advanced level training cycles).
- Military education (Army non-commissioned officer).

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#### 08 TERTIARY EDUCATION, 1<sup>ST</sup> CYCLE.

This includes short cycle university studies (normally, three years in duration) whose completion gives the student the right to a diploma, technical engineer, or technical architect degree.

Engineering and technology area.

- Technical architect.
- Surveyor.
- Assistant engineer.
- Mineralogical and metallurgical mines and factories professional.
- Topography.
- Graduate in IT.
- Computer management.
- Computer systems.
- Diploma in civil navy
- Diploma in naval machines.
- Diploma in maritime navigation

- Graduate in naval radioelectronics.
- Graduate, technical engineer or expert in:
  - Aeronautics
  - Aircraft.
  - Wind engines.
  - Aeronavigation.
  - Airports.
  - Aerospatial equipment and materials.
  - Agricultural.
  - Agrofishing operations.
  - Hortifructiculture and gardening.
  - Agrarian and food industries.
  - Rural mechanisation and construction.
  - Public construction.
  - Civil construction.
  - Hydrology.
  - Topography.
  - Transport and urban services.
  - Industrial.
  - Mechanics.
  - Electricity.
  - Industrial Electronics.
  - Industrial Chemistry.
  - Textile or knitted fabrics.
  - Industrial design.
  - Forestry.
  - Forestry operations.
  - Mining probes and prospections.
  - Mining electromechanical facilities.
  - Mineralogy and metallurgy.

- Energy resources, fuels and explosives.
- Telecommunications.
- Telematics
- Telecommunication systems.
- Sound and imaging.
- Electronic systems.
- Naval.
- Marine structures.
- Ship propulsion and services
- Other area qualifications.

#### Health sciences area

- Nursing.
- Matrons.
- A.T.S.
- General Practitioner.
- Physiotherapy.
- Speech therapy.
- Chiropody.
- Optics and optometry or optics
- Occupational Therapy.
- Other related diplomas.

#### Humanities area.

- Translators and interpreters.
- Ecclesiastical sciences.
- Other related diplomas.

#### Social and legal sciences.

- Biblioteconomics and Documentation.
- Graduate in business sciences or business studies.
- Commercial Professor.
- Mercantile steward.

- Management and Public Administration.
- Social Work.
- Social worker.
- Communication and information.
- Social graduate or labour relations.
- Basic general education teaching body.
- Diploma in speech therapy.
- Diploma in Social Education.
- Teaching.
- Teacher with speciality in:
  - Pre primary school education.
  - Primary education.
  - Foreign language.
  - Physical education.
  - Musical education.
  - Special Education.
- Hearing and language.
- Diploma in tourist companies and activities.
- Other related diplomas.

Experimental sciences area.

- Statistics.
- IT (diploma or technical engineer).
- Applications analyst (from the IT institute).
- Other related diplomas.
- Three courses passed (or first cycle), without right to use qualification, advanced studies of two cycles.

Studies equivalent for all intents and purposes to university diploma.

- Diploma in physical education.
- New qualifications covered in the EGSO that are considered equivalent for all intents and purposes to a university diploma:

Conservation and restoration of cultural goods and others that are created.

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09 TERTIARY EDUCATION, 2<sup>ND</sup> CYCLE.

Engineering and technology area.

- Architects.
- Engineers.
- Graduated in civil navy or navigation.
- Only 2nd cycle studies:
  - Naval machines graduate.
  - Navigation and maritime transport graduate.
  - Naval radioelectronics graduate.
- Electronics
- Industrial Organisation.
- Geodetics and Cartography.
- Industrial Automation and Electronics.
- Of Materials.
- Other related qualifications.

Health sciences area.

- Medicine or medicine and surgery.
- Odontology.
- Pharmacy.
- Veterinary medicine.
- Only 2nd cycle studies:
  - Science and technology of food.
  - Other related degrees.

Humanities area.

- Literature and comparative literature theory.
- Philosophy.
- Philosophy and education sciences.
- Theology.
- Philology.

- German, Arabic, Catalan, ...
  - Fine Arts.
  - Geography.
  - Geography and history.
  - History.
  - Art History.
  - Translating and Interpreting.
  - Humanities.
  - Musicology.
  - Only 2nd cycle studies.
  - Documentation.
  - Linguistics.
  - Literature and comparative literature theory.
  - Music history and sciences.
  - Other related degrees.
- Social and legal sciences.
- Law.
  - Canon Law.
  - Teaching or education sciences.
  - Information Sciences.
  - Journalism.
  - Business studies and economics sciences.
  - Mercantile quartermaster generals.
  - Insurance actuaries.
  - Economic sciences or economics.
  - Sociological sciences or sociology.
  - Political and administration sciences or political sciences.
  - Political Sciences and Sociology.
  - Corporate or business administration and management.
  - Psychology.

- Audiovisual communication or imaging and sound sciences.
- Advertising and Public Relations.
- Graduate in physical education of physical and sports sciences.
- Only 2nd cycle studies:
  - Documentation
  - Actuarial and financial sciences.
  - Market research and techniques.
  - Social and cultural anthropology.
  - Other experimental degree courses.

Experimental sciences area.

- Sciences.
  - Biological sciences or biology.
  - Ocean sciences.
  - Physical sciences or physics.
  - Geological sciences or geology.
  - Mathematical sciences or mathematics.
  - Chemical sciences or chemistry.
  - Environmental sciences.
  - IT (graduate or engineer).
  - Systems technician (from the IT Institute)
- Only 2nd cycle study:
  - Biochemistry.
  - Statistical Sciences and Techniques
  - Other related degrees.

Studies equivalent for all intents and purposes to university graduate.

- Advanced military education.
- New qualifications covered in the EGSO that are considered equivalent for all intents and purposes to a university graduate: advanced music, dance, dramatic art and others that are created
- Ecclesiastical studies or equivalent.
- Conservation and restoration of cultural goods.

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10 OTHER 3<sup>RD</sup> LEVEL STUDIES, 1<sup>ST</sup> AND 2<sup>ND</sup> CYCLE.

Advanced studies of two and three years duration not equivalent to university graduate.

- Restorer qualification (non-university).
- Occupational therapist (faculties dependent on the Ministry of Health)
- Technical engineer in the paper industry
- Diploma in criminology.
- Gemmology.
- Private investigator
- Civil aviation: commercial pilot's licence, first class aeronautical commercial pilot's qualification
- Fashion design, two years.
- Enology.
- Public relations (non-university).

Advanced studies of at least four years duration not equivalent to university graduate.

- Advanced level music: teacher's qualification (from 1942 to 1966) or advanced teacher (as of 1966).
- Advanced school of singing: choral singer, opera singer and specialised concert singer and soloist.
- Advanced fashion designer.
- Other qualifications that are not equivalent to diploma or graduate and which have the condition of having finished secondary education for admission.

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11 TERTIARY EDUCATION, 3<sup>RD</sup> CYCLE.

- Doctors in engineering, technology, architecture, health sciences and experimental sciences.
- Doctors in humanities and social and legal sciences.
- Postgraduate studies or masters in university centres.
- Postgraduate studies or masters in non-university centres.
- Official specialisation studies

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12 SPECIAL EDUCATION NOT DEFINED BY THE DEGREE

- Special education imparted in specific centres and specific units in ordinary centres.

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13 ADULT EDUCATION NOT DEFINED BY THE DEGREE.

- Adult education, general and without any level.
- Literacy of adults.
- Other adult education for adults with the attainment of educational system qualifications.