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Structure

- Title** Design principles for family budget survey questionnaire
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- Abstract** High quality questionnaire design is an essential component of all survey-based data collection. This presentation examines the application of recommended practices within the European Statistical System and experience of partner international organisations to establish Family Budget Survey (FBS) questionnaires used for latest surveys conducted amongst staff of international organisations. The paper does not address sample design and response rate issues. The paper does not address ex-post processing or imputation procedures.
- Keywords** Family Budget Surveys, Correction Coefficients, Quality Framework, Questionnaire Design Principles
- Disclaimer** The opinions expressed in this document represent the authors' points of view and are not necessarily shared by the European Commission (Eurostat).

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Introduction – survey objectives

Variously known as “Family Budget Survey”, “Survey of Household Expenditure”, “Family Resources Survey”, “Household Budget Survey”, “Consumption Expenditure Survey”, these surveys aim to collect information about the consumption patterns of active staff working at Intra-EU and Extra-EU duty stations, and a separate survey is done for retired staff.

The availability of such consumption structures for the reference location (Brussels in the case of the EU) and for each comparison location is a fundamental requirement for the production of aggregate-level spatial price indices (“purchasing power parities” → “correction coefficients”) using the Fisher-type index methodology which is applied by Eurostat. The structure for the reference location is also used to produce a Laspeyres-type aggregate-level index of temporal consumer price inflation (“joint Belgium-Luxembourg index”. [Appendix 1](#) reproduces diagrams to illustrate these calculations.

Statistical formulae for the aggregate JBLI and PPP calculations are shown below:

$${}_{t0}JBLI_{t1}^i = \frac{\sum_{i=1}^{80} {}_{t0}JBLI_{t1}^i \times W_B^i}{\sum_{i=1}^{80} W_B^i}$$

$${}_xPPA_B^L = \frac{\sum_{i=1}^{80} PPA_i \times W_{Bj}}{\sum_{i=1}^{80} W_{Bj}}$$

$${}_xPPA_B^P = \frac{\sum_{i=1}^{80} W_{Bj}}{\sum_{i=1}^{80} \left(\frac{1}{PPA_i} \times W_{Bj} \right)}$$

$${}_xPPA_B^F = \sqrt{({}_xPPA_B^L \times {}_xPPA_B^P)}$$

Target population

To use the weighting pattern of the average national household could give a different and quite inappropriate result due to the important differences in circumstances and consumption habits which can be observed between expatriate staff and indigenous populations. Thus a direct survey of staff is justified. Results for individual respondents are combined: the final weights reflect the household expenditure pattern of the average staff member.

Increasing number of survey participants over time

The European Coal and Steel Community was established in April 1951 by six countries (Belgium, France, Germany, Italy, Luxembourg and Netherlands). That agreement created five supranational institutions: High Authority; Common Assembly; Special Council; Court; Consultative Committee. The secretariats of these institutions were initially staffed by around 500 civil servants, working mainly in Luxembourg.

Between 1951 and 2019 the EU has expanded to comprise 28 member states, and its mission has expanded to include responsibilities in many socio-economic domains. The number of institutions, and in particular the number of subsidiary agencies distributed around the EU rather than located in Brussels, has increased significantly (there are now nearly 50 decentralised bodies to supplement the work of the EU institutions). In some countries there are multiple duty stations. Total staff numbers have increased in line with these developments. Moreover, different categories of employment have been created, with increasing use of staff on temporary employment contracts.

In addition, the expansion of recruitment base and ageing of EU staff over time means that the number of retired EU staff and location of residence is also increasing. The pension scheme has not yet reached maturity (when the numbers of employees and retirees stabilises).

As at December 2017, the number of beneficiaries was nearly 22,000.¹

The annual EU Budget specifies the number of staff posts (permanent and temporary officials) for each institution: the figures for 2017² are summarised in [Appendix 2](#). However, the budget does not define the number of Contract Agents, which have increased significantly since 2004 and now exceed 10,000. The active staff (permanent officials and contract agents) are working mainly in Brussels and Luxembourg but are also distributed throughout the EU, and in some cases outside the EU. There are now 145 Extra-EU Delegations around the world.

The FBS amongst retired officials (pensioners) is a special case, covering all EU Member States simultaneously.

For active staff, the population size and profile varies with each duty station location. Numbers can vary between fewer than 10 persons, to 10s of thousands (Brussels, Luxembourg). To reflect the varying numbers of participants, FBS are organised to distribute the associated workload. In some cases, multiple countries are covered in parallel. As far as possible, FBS in a given country are conducted simultaneously amongst all participating organisations and duty stations in that country.

Collaboration between international organisations

The United Nations, the Coordinated Organisations³ and other international organisations have similar requirements and require similar index calculations for staff salary adjustment purposes. Since 2009 signature of an international memorandum of understanding, there has been ever-closer collaboration between the three largest groupings.

As regards family budget surveys, their technical content is now harmonised between Eurostat, the International Service for Remuneration and Pensions (ISRP) of the Coordinated Organisations, and the International Civil Service Commission (ICSC) of the United Nations. A fully harmonised questionnaire tool is used jointly by Eurostat and ISRP.

When launching family budget surveys, in an attempt to expand the response sample to include staff with similar profiles, Eurostat and ISRP also coordinate participation by other independent international organisations, notably the European Schools, the European Organisation for the Safety of Air Navigation (EuroControl) and the European Patent Office (EPO).

For the work coordinated by Eurostat and ISRP, the latest cycle of family budget surveys has covered 90,000 persons altogether.

Sampling unit

The sampling unit for the Eurostat staff FBS is the household. In line with standard approaches, this is based on residency requirements (“main dwelling in the duty station, where majority of time is spent”) and intermingling of income (“common, regular provision for food and other essentials for living”). In practice, for expatriate international officials the household is generally synonymous with the alternative standard approach (family – “persons related by birth, marriage, or adoption and residing together”). Composition of households can clearly vary, and the questionnaire captures basic profile data to assist interpretation of results during processing of responses.

Consumption patterns are expected to vary according with profile and circumstances.

1 Source: Pension Scheme of EU Officials database.

2 Source: EU Budget for 2017 as published in Official Journal L 51 of 28/02/2017

3 Council of Europe (CoE); European Centre for Medium-range Weather Forecasting (ECMWF); European Organisation for Exploitation of Meteorological Satellites (EUMETSAT); European Space Agency (ESA); North Atlantic Treaty Organisation (NATO); Organisation for Economic Cooperation and Development (OECD);

Insofar as possible, Eurostat seeks a high and balanced participation of respondents according to variables such as gender, age, marital status, parental status, salary grade, contract status (permanent/temporary), country-of-origin, date of arrival/departure, tenancy status, urban/rural location, political/religious/sexual orientation, ethnic origin, leisure interests.

Sampling approach

The Eurostat staff FBS participation is currently organised on a voluntary, self-selection basis. This is a deliberate decision to guarantee **anonymity** and thereby maximise survey response for this sensitive subject area⁴. In parallel, a number of measures are taken to encourage active participation.

Due to the limited resources at disposal of Eurostat, the high potential participation numbers, the geographical dispersion of respondents, and the guarantee of anonymity, there is no possibility to conduct the survey as a PAPI (paper assisted personal interview) or CAPI (computer assisted personal interview) where a surveyor interviews respondents and helps them to complete the questionnaire, or even records their answers directly. Instead, respondents are asked to work alone to complete the questionnaire.

There is no ex ante stratification of participants (calibration data is rarely available from internal administrative sources with sufficient granularity, or on timely basis), sample participants are not selected at random, and there is no means of chasing-up respondents to encourage participation, or identify reasons for non-participation.

It is recognised that there is a potential self-selection bias with such non-probability sampling approach, although it is unclear whether this necessarily achieves worse-quality results in practice than would be achieved by alternative probability-based approaches. [With potential transition to a duplicate server in future, there will be an opportunity to test impact of password-controlled access on willingness to participate.](#)

Target sample size

The more heterogenous a population is, the greater is the likelihood that an individual sample observation will vary from the average. Consequently, the more heterogenous the population, the larger the sample size needs to be to obtain a desired level of precision. Characteristics which are rare amongst a population require larger samples to provide estimates with a reasonably small standard deviation around the mean.

Expenditure surveys have many variables and different sample size requirements might apply for different variables. In practice, a compromise has to be reached.

The key issue is to establish the desired level of accuracy. A common standard is 5% margin of error at 95% level of confidence. Assuming a normal distribution, what this means is that 95 times out of a 100 the true population mean will lie within the range bounded by the observed sample mean plus or minus two (1.96) standard deviations. A higher degree of precision (eg. 5% margin of error at 99% level of confidence, or 1% margin of error at 95% level of confidence) will require an increase in the sample size. As the sample standard deviation is linked to the square root of the sample size, then other things being equal to halve the desired margin of error a quadrupling of the sample size is needed. In practice, the population mean and standard deviation cannot be known in advance. A common assumption is that sample estimates with relative errors (coefficient of variation) greater than 25% may be insufficiently reliable.

⁴ There has long been an official public data protection notification relating to the work done on family budget surveys. The previous text (DPO-202.9) was comprehensively revised for the launch of the Brussels FBS in autumn 2017. Following adoption of the General Data Protection Regulation in 2018, internal systems were reviewed in 2019. The current text can be found at the following web address: <https://ec.europa.eu/dpo-register/detail/DPR-EC-00993>

So, for a population of size ‘N’ with an expected coefficient of variation (CV) of 25%, if we desire a high level of precision/low margin of error (+/-5%) with a high confidence level (95%), an indication of the minimum target sample size ‘n’ is given by the following formula:

$${}_{t0}JBLI_{t1}^i = \frac{\sum_{i=1}^{80} {}_{t0}JBLI_{t1}^i \times W_B^i}{\sum_{i=1}^{80} W_B^i}$$

Thus for a population of size N = 20,000, the target sample size = 96. For a population of size 2,000, n = 92 and for population of size 200, n = 65.

Non-response

The foregoing estimates make no allowance for non-response, which may be biased. Ex-post calibration may not resolve that problem. This argues for increasing the target sample size in practice.

Regional pooling

FBS results for the same duty station from surveys conducted at different points in time could potentially be combined. However, the delay between surveys can see considerable staff mobility and important changes to economic circumstances, with consequent volatility in expenditure patterns. Similarly, price-updating weights using indices may not capture intervening impacts correctly.

Where possible, results for EU staff are combined with results from parallel surveys conducted amongst staff of partner international organisations based in Europe (notably Coordinated Organisations International Service for Remuneration and Pensions, EuroControl and European Patent Organisation) – and with the similar surveys conducted by the United Nations International Civil Service Commission.

If sample sizes still do not allow robust, anonymous consumption structures to be established, the approach approved by the Expert Working Group on Articles 64 & 65 of the Staff Regulations is to combine (“pool”) information for multiple duty stations in the same geographic region, and then calculate an average weighting structure which applies for all those locations. As accommodation rent is typically the single most important element of the consumption basket, and rent price levels can be significantly different from one location to another, a specific methodology has been adopted to adjust the pool weighting structure to reflect known differences.

Design – organisation

The questionnaire plays a key role in the transfer of information from those who have it to those who need it. Careful consideration at the design stage is crucial in achieving maximum quantity and quality of response and to facilitate subsequent processing, whilst minimising the cost and burden involved in obtaining the information.

Paper questionnaires

Traditionally, the Eurostat FBS was organised in paper format, ie. Eurostat printed blank questionnaires which were circulated to participants by mail, who filled them in manually before returning them to Eurostat. Subsequently, questionnaires were made available for download, and the completed version was either mailed to Eurostat, or scanned and sent as an email attachment.

The traditional paper approach involved a number of issues associated with format and size. For example, with initial mailings the weight affected the cost, and there was consequent pressure on questionnaire length and quality of production material.

This had to be balanced against the desire to elicit a response from respondents and the requirement that paper questionnaires were sufficiently sturdy to survive handling in the field.

Switch to online questionnaires

Since 2009, Eurostat has predominantly organised the FBS using an online questionnaire. However, the paper/PDF version can still be helpful as a temporary aid for recording information to be entered in the online questionnaire. The online version currently exists in English and French language versions, with a PDF version in German. Major improvements were made during 2015 as a joint collaboration between Eurostat and the International Service for Remuneration and Pensions of the Coordinated Organisations.

The switch from traditional paper questionnaires to online survey questionnaire has increased participation *quantity* significantly (eg. by a factor of nearly 3 for Brussels and for Pensioners). It has also facilitated coverage of target population. It is more difficult to conclude whether response *quality* has improved. In many cases, the design features of the online questionnaire are considered to have generated more accurate replies from participants. Nevertheless, in some cases the use of online survey questionnaire has reduced item response (submission of incomplete questionnaires) and there have been isolated examples of duplicate questionnaires being submitted. On the other hand, data is now captured automatically rather than being manually entered with associated risk of transcription errors, allowing Eurostat greater opportunity to focus on quality review during data processing phase. There remains a substantial query-handling burden for Eurostat. [For future surveys, creation of a telephone answerphone to complement the functional mailbox may be helpful for handling large numbers of respondents, and investment in creating a Wiki applet or short “how to” video may reduce pressure and assist explanatory process.](#)

It can be noted that the United Nations International Civil Service Commission has also switched to an online data collection tool for Household Expenditure Surveys in their “Group II” duty stations with effect from 2016, with similar objectives to enhance effectiveness (quality) and efficiency (economy) of the data collection process.

Periodicity

Depending on target participation numbers, and subsequent quantity and quality of response, the workload for each survey remains substantial. With limited resources, it is not feasible for Eurostat to conduct FBS simultaneously in all duty station countries. Eurostat therefore continues to spread the survey work over a number of years, conducting surveys in particular locations at periodic intervals. Similarly, for ISRP logistical problems are posed when attempting to run surveys simultaneously in Germany, France and Netherlands due to concentration of Coordinated Organisations staff in those countries.

In the normal course of events, the cycle starts with a survey in Brussels (the reference location for Eurostat correction coefficient calculation purposes). For locations outside Brussels, the questionnaire then normally remains stable until the next Brussels survey is organised. By contrast, supporting material such as “frequently asked questions” document should be updated after each survey to reflect any new lessons learned. Exceptionally, for the current cycle, the revised online questionnaire was field-tested in a handful of smaller duty stations before being launched more widely.

There have been various versions of the FBS paper questionnaire over time, reflecting developments in methodology (eg. basic heading classification) and practice (eg. collaboration with international partner organisations). Major cycles have been 1989-93, 1994-98, 1999-2004, 2005-2008, 2009-2015. The current FBS cycle began in 2016, following a major harmonisation exercise with partner organisations (notably the International Service for Remuneration and Pensions of the Coordinated Organisations and the United Nations International Civil Service Commission). Subject to resource constraints, the Eurostat Intra-EU staff surveys are expected to be completed during 2020, with FBS in Extra-EU locations and amongst Pensioners then expected to be organised during 2021.

The EU staff regulations require that economic parities be calculated in such a way that each basic component can be checked by direct survey at least once every five years. For practical reasons, the Expert Working Group on Articles 64&65 of the Staff Regulations has authorised an extension to seven years. The longer the delay between family budget surveys, the greater the likelihood of a change in reported consumption patterns, due to potential intervening changes in population profile (size/composition) and economic circumstances.

Timing

Insofar as possible, the data collection is organised to avoid major holiday periods. This is done primarily to maximise potential response rate. As diary method is no longer employed, and the reference period is a whole twelve-month period, the potential impact of seasonal behaviours on reported consumption expenditure patterns is considered to be low. Participating organisations may conduct survey in a given location at slightly different times.

The survey generally starts with distribution of a formal request letter to staff. Early liaison with, and commitment by, participating organisations (notably HR contacts in the increasing number and dispersion of EU administrations) are important to avoid delays in launching the surveys. This is especially important where there is a chain involving multiple contact persons.

Arranging an FBS launch meeting in one or more duty stations either before or during the survey generates a visible increase in quantity and quality of response, as well as providing an opportunity for Eurostat to answer questions from staff about the calculation of remuneration statistics more generally.

Survey content

Unlike similar surveys conducted by national statistical offices amongst the general population, the Eurostat staff FBS is solely designed to compile information about consumption expenditure, with a minimum collection of complementary control variables. It does not compile additional information to permit ulterior uses associated with wider analysis of living standards, monitoring of social trends, production of other economic statistics, etc.

In most cases, there is a direct one-to-one relation between questions in the questionnaire and the 80 “basic headings” in the classification used for correction coefficient calculation purposes⁵.

The 80 basic headings related to 12 main expenditure groups, and these are summarised below. The standard COICOP (“statistical classification of individual consumption by purpose”, version) sets the framework.



⁵ See current Eurostat methodology manual for list of the basic headings. The classification was changed in 2005 (from 84 to 80). With effect from 2009, Extra-EU and Intra-EU use the same classification and questionnaire. A future change is possible during implementation of the next global standard “COICOP” classification. The current COICOP dates from 1999: a revision was agreed at international level in 2018, and will be implemented in coming years.

The nature of the information compiled in the FBS is unavoidably sensitive and comprehensive, without being necessarily complex. The current version of the questionnaire is a document that has been refined over time to minimise response burden and maximise quality of data collected.

There are conflicting academic voices regarding length of the questionnaire and propensity of respondent to de-commit (ie. stop recording information at some point during the process, and fail to submit a completed questionnaire to Eurostat). Some researchers consider that the depth and importance of the questionnaire in the respondent's eyes is itself a motivating factor to ensure a high quality response.

The layout of the current questionnaire is included as an appendix to the Eurostat Intra-EU method manual and reproduced as [Appendix 3](#). It comprises the following sections together with explanatory notes and a glossary:

Part 1	-	Personal Information + Monthly rent/loan
Part 2	Qs 1-9	Dwelling-related regular bills
Part 3	Qs 10-15	Food, Drink, Tobacco, Restaurants, Canteen
	Qs 16-29	Public and private transport (incl. repairs)
	Qs 30-45	Dwelling repairs, Furniture, Electrical and electronic
	Qs 44-54	Leisure
	Qs 55-61	Clothing and footwear
	Qs 62-72	Personal care, Books, Holidays
	Qs 73-79	Domestic services and cleaning, Other repairs
	Qs 80-84	Insurance, Miscellaneous
Part 4	Qs 85-88	Education (expenditure-reimbursement)
Part 5	Qs 89-91	Healthcare (expenditure-reimbursement)
Part 6	Qs 92-100	Other expenses (to be reallocated) + comments section

In-area and out-of-area expenditures

For each question, there are four columns for data entry. Purchases of goods and service inside the country of the duty station can be recorded either as expenditure for an average month or total expenditure in the last 12 months. Purchases outside the country of the duty station should be recorded as total expenditure in the last 12 months together with the currency in which payment was made. Expenditures in multiple currencies are possible.

Survey design – I

The aim of the questionnaire design stage is to ensure that the necessary data is compiled with the necessary degree of accuracy. Questions should be phrased to ensure they measure what they are intended to. The burden on respondents should be minimised: they should be helped to ensure data does not fail to be recorded and that data is not mis-recorded. Ideally, all respondents should understand the questions in the same way.

The **wording** of the current FBS questions are as clear, precise and unambiguous as possible. In the online questionnaire, the questions are complemented by active links to background information, including drop-down menus with options to be selected, and pop-up explanations (eg. relevant glossary extracts). There are also passive links to background information (eg. glossary, guidelines for completing the questionnaire, answers to frequently-asked questions). The respondent does not have to guess what is required. Loaded questions which might influence respondents to respond in particular way are avoided. The “BOSS” principle was applied: brief, objective, simple and specific.

The use of **drop-down menus** with options to be selected, is intended both to simplify the response burden and to standardise recording of answers for people in similar situations. However there is always an “open” category to ensure all potential situations can be captured. The majority of the information requested in the questionnaire involves monetary values for clearly-defined categories. However there is an open-ended question at the end regarding “other” expenditures which may be relevant to reflect particular situation of an individual respondent.

In line with standard practice for household surveys, the questionnaire begins with standard questions about the sample unit and its composition, before beginning the detailed questions that constitute the main subject of the survey. Insofar as possible, the **ordering** of questions follows a logical sequence. Related expenditure items are grouped together. For the online questionnaire, questions relating to one of mutually exclusive situations (eg. owner/tenant) are suppressed to ensure respondents are only confronted with questions relating to their specific circumstances.

For the online questionnaire, **real-time feedback** is provided where possible. For example alphanumeric checks are done on data entered; reasonableness checks are done on values entered. End-of-survey feedback is also provided (eg. number of questions to which no answer yet supplied). Once a respondent submits their completed questionnaire, a specific post-survey feedback is provided: total annual expenditure value based on answers provided is broken down according to 12 main COICOP groups.

In future improvements, a green/red “progress bar” may be added showing the number of questions already answered/still to be answered; expenditure total for the year (= sum of answers provided so far) may also be implemented. Also for the online questionnaire, feedback and encouragement can be provided at periodic intervals (eg. “Thank you for the effort you are taking to complete this questionnaire”).

Survey design – II

To the extent possible, the following issues were also taken into consideration when designing the current online questionnaire:

- It is recognised that respondents may have emotional reaction to colour, clarity, symbols, language, etc. For a questionnaire of this type it is important to ensure a professional image is created. Informal styling was avoided. Garish colours were avoided. Discordant shapes were avoided. Type fonts and sizes were chosen to maximise clarity. A consistent style was used.
- Pages were designed to be as uncluttered as possible. Grouping of more than 5-6 items on page was avoided. The need to scroll down pages to see questions was minimised: it is preferable to click “next page” than to scroll up and down on a given page.
Where scrolling is unavoidable, attempt was made to ensure that header rows, instructions, etc. remain visible.
- It is also recognised that respondents may have a functional reaction to logic flow (dislike confusing jumps, sequencing to unrelated items, incomplete instructions, inconsistent style, etc).
- When drafting questions and explanatory text, the use of long, complex phrases was avoided. Every attempt was made to explain unfamiliar concepts. Sections began with simple context-setting before progressing to complicated content.
- The navigation rules/symbols/sequence were made as clear as possible. If reference is needed to separate information, this should appear in pop-up windows rather than requiring the user to leave the data entry sheet.
- There are no repeat questions, and no overlapping questions. No superfluous information is requested.
- The questionnaire includes a “comments” box to collect observations and ensure full coverage.

Some specific problem areas

In the past, a 14-day diary section was used to capture information about expenditure on **food, drink and tobacco**. This approach has been simplified, and these expenditure items are now recorded as total amounts. Breakdown of these amounts into component basic headings is instead done during ex post processing, using information about national expenditure patterns. It is recognised that this approach may be less suitable in countries outside the EU where information may be less available and circumstances may be less similar.

There are **linkages** between some questions, involving both expenditures and reimbursements, for example: car purchases + car sale receipts; health expenses + health insurance reimbursements; education expenses + education allowances. These are automatically netted off during ex post processing, however evidence from previous exercises justifies separate capture of the component elements.

Recall period

The questionnaire necessarily seeks information about comprehensive expenditure over 12 month period. It is recognised that in general, a long recall period is undesirable. It is possible that some information will be retained by the respondent for rental contracts and other larger expenditures such as invoices relating to purchase of motor vehicles, furniture, major appliances, tuition fees, healthcare bills. Some regular monthly expenditures will be done under a contract or direct debit system. For smaller, more regular expenditures, the option of recording typical monthly expenditure will allow extrapolation to produce annual total.

FBS respondents are not necessarily expected to manage their household budgets keeping strict accounting records and preparing regular reports and analyses: in practice, experience suggests that many people do not actively keep paper receipts or track their expenditures. With sufficient time, ex post review of credit card statements and bank account statements can provide most of the information required to fill in the questionnaire – but not everyone will be willing/able to do so.

To assist respondents with the recall process, it can be helpful when they printout a paper version of the PDF questionnaire some time before participation in the actual online survey, and already start recording answers to certain questions and/or compiling relevant supporting information. A traditional pencil-and-paper diary or a simple spreadsheet can also be used to capture and summarise daily/weekly expenditure to build up information about typical monthly total.

There are already a range of personal finance management and budgeting apps available to purchase or download free-of-charge onto mobile phones (see box below). Some are country/currency specific. It is understandable that respondents could have concerns about their data privacy when using a commercial tool in this way. **In future, subject to resource constraints, it may be possible for Eurostat to develop a mobile phone “app” specifically to capture expenditure information in real-time for FBS purposes, respecting confidentiality.** Of course, such solutions will only work if the respondent makes expense-tracking a habit.

Box: lists of budgeting applications can be easily identified using an internet search engine. A non-exhaustive list of examples (extraction date November 2019) is included below. No evaluation is made:

1. “Wally” http://wally.me/?dd_pm=none&dd_pm_cat=finance_app
2. EveryDollar <https://www.everydollar.com/>
3. “Mint” https://www.mint.com/?dd_pm=none&dd_pm_cat=finance_app
4. “Pocketguard” https://pocketguard.com/?dd_pm=none&dd_pm_cat=finance_app
5. “YNAB” https://www.youneedabudget.com/?dd_pm=none&dd_pm_cat=finance_app
6. “Goodbudget” https://goodbudget.com/?dd_pm=none&dd_pm_cat=finance_app
7. “Simple” https://www.simple.com/?dd_pm=none&dd_pm_cat=finance_app
8. “PersonalCapital” https://www.personalcapital.com/?dd_pm=none&dd_pm_cat=finance_app
9. “ClarityMoney” <https://www.marcus.com/us/en/clarity-money>
10. “MoneyDashboard” <https://www.moneydashboard.com/>
11. “Moneyhub” <https://www.moneyhub.com/>
12. “Squirrel” <https://squirrel.me/>
13. “Yolt” <https://www.yolt.com/>
14. “Bud” (FirstDirect) <https://thisisbud.com/products>
15. “Sync Home Budget” <https://apps.apple.com/us/app/homebudget-with-sync/id306257910>

Questionnaire testing

The current questionnaire is an evolutionary development to improve and refine previous versions, which have already proved broadly successful, and therefore does not start entirely from scratch.

Specific focus groups were not used, however some feedback was received when Eurostat presentations to Expert Working Group on Articles 64&65 of the Staff Regulations were communicated during internal social dialogue process.

Laboratory testing was done prior to implementation, with in-house experts familiar in the domain. The drop-down menus and automatic reasonableness checks were particularly improved as a result. Pre-testing was also done with contacts in administrations of participant EU bodies, prior to going live. One problem identified during this phase concerned internet browser set-ups and firewalls which interfered with access and/or visualisation of the questionnaire. Some standardised work-arounds were implemented as a result.

Finally, contrary to the usual practice in previous survey cycles, rather than launching initially in Brussels, the revised online survey was field-tested in a number of smaller duty stations, before being launched more widely.

Experience of partner international organisations

In preparing their 2016 cycle of Household Expenditure Surveys, in collaboration with Eurostat and International Service for Remuneration and Pensions of the Coordinated Organisations, the United Nations International Civil Service Commission took major steps to harmonise content of their questionnaire. This will further facilitate data exchange under existing Memorandum of Understanding. Another important change was to integrate the previously separate “Housing and Domestic Services Questionnaire” and “Household Expenditure Questionnaire” into a single tool, removing the duplication of several questions. As one input into refining their questionnaire design, the UN ICSC made use of focus groups including staff representatives.

Similar reflections regarding clarity, simplicity, logical flow were applied by the UN ICSC to those which informed the Eurostat design process. Related expenditure categories were grouped into short, homogenous sections (inspired by the COICOP 12 main groups). Brief explanatory notes were added at the beginning and end of each section to guide the respondent through the questionnaire. A similar split between in-area and out-of-area expenditures was implemented. Each question elicits information about average monthly expenditure or total annual expenditure. Drop-down menus are extensively used to help ensure data quality. Built-in pop-up warnings also help ensure completeness and accuracy of responses. “Skip patterns” are strategically placed throughout the online questionnaire to facilitate navigation and de-activate irrelevant sections according to prior responses. For example, if a staff member indicates they have not made any purchases in foreign currency, the corresponding out-of-area column is automatically suppressed.

A visual “progress bar” is displayed at the top of each page to help the respondent monitor their completion of the questionnaire. A comprehensive glossary is included at the end of the questionnaire for reference. Column headings are “frozen” if pages require scrolling down to see full content. Buttons at the bottom of each page allow to jump to first page/previous page/next page/last page. There is also a “reset the entire survey” button, and a button to “show the results”. A “thank you for taking part” message is given on completing the survey.

For “Group 1” countries, disaggregation of aggregate-level questions into expenditures for component basic headings (eg. food; alcohol; clothing) is suggested using either price-updated consumption structure from previous (ie. 2010–2015) surveys or external data (ie. HICP for EU and Switzerland, official CPI for USA and Canada).

Staff email address is used as unique identifier: this allows UN ICSC to follow-up participation in the survey, and to sub-analyse response according to employer.

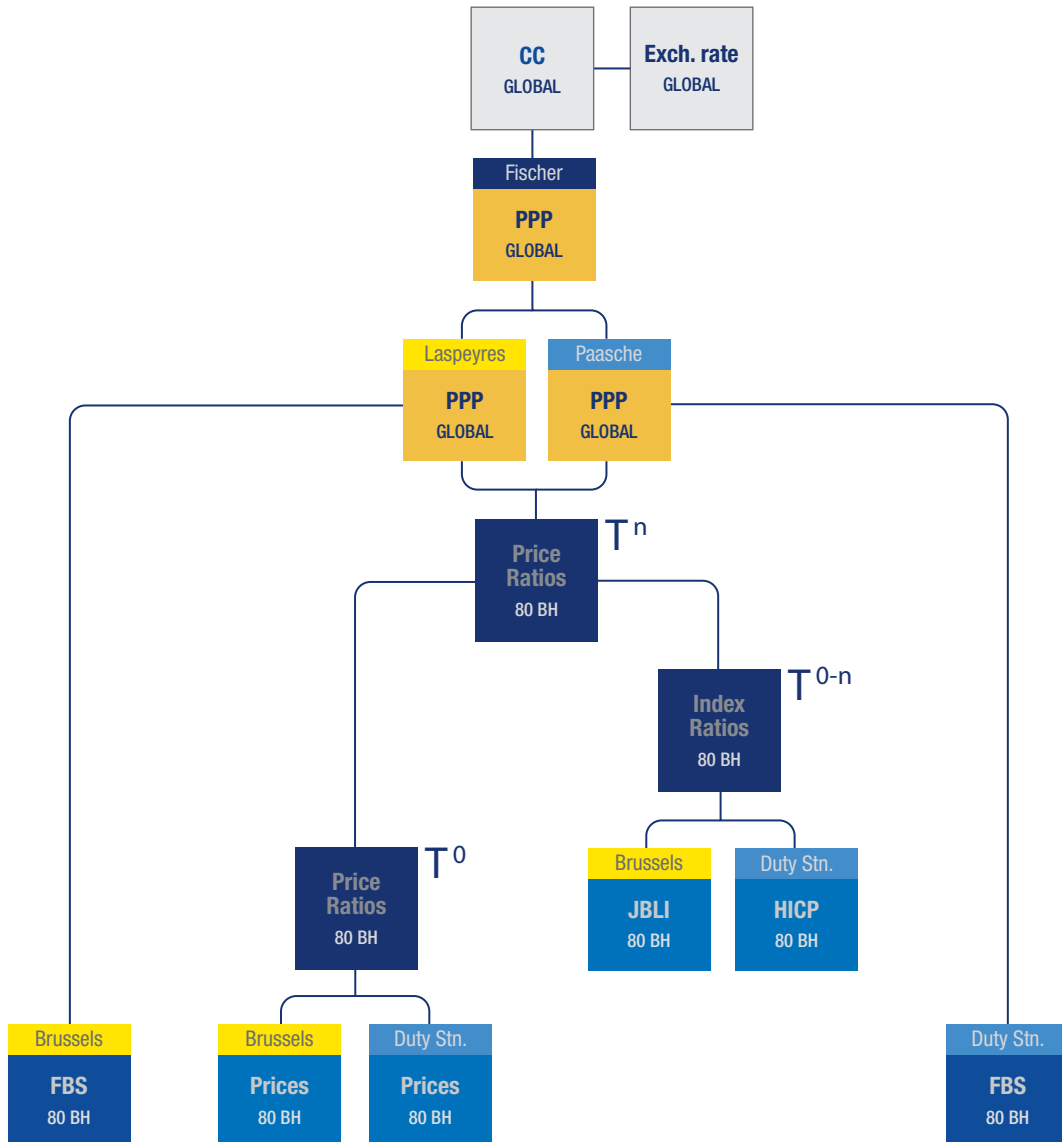
Conclusion

Eurostat is satisfied that the current FBS questionnaire reflects best practice in design, and that using the questionnaire in practice is facilitating the collection of high-quality data on consumption expenditure patterns of EU staff households. Subject to resource constraints, Eurostat will continue to refine the approach in collaboration with international partners, to achieve greater effectiveness, efficiency and economy in meeting user needs.

Appendix 1: Diagrams of aggregate CC calculation and aggregate JBLI calculation

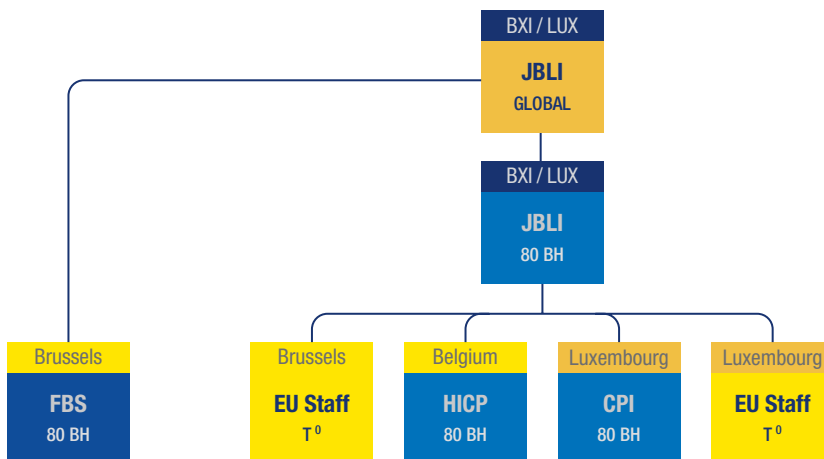
Diagram of CC calculation

Fisher-type



Calculating the Joint Belgium–Luxembourg Index

Laspeyres-type



Appendix 2: Authorised staff posts per EU Budget 2017
(permanent + temporary officials: does not include contract agents)

Official Journal L.51/2017			
General Budget		POSTS	
I	Parliament	6,743	
II	Council	3,027	
III	Commission	18,786	
	JRC	1,748	
	Research	1,537	
	Publications office	595	OP
	Anti-fraud office	349	OLAF
	Personnel selection office	109	EPSO
	Payment Office	165	PMO
	Infrastructure Brussels	339	OIB
	Infrastructure Luxembourg	128	OIL
	ECHA, Helsinki FI	460	
	GSA, Prague CZ	116	
	EuroFound, Dublin IE	93	
	OSHA, Bilbao ES	40	
	EASA, Koln DE	678	
	EMSA, Lisbon PT	212	
	ERA, Valenciennes FR	139	
	EEA, Copenhagen DK	127	
	ENISA, Heraklion EL	48	
	BEREC, Riga LV	14	
	EFCA, Vigo ES	61	
	EBA, London UK	134	
	EIOPA, Frankfurt DE	101	
	ESMA, Paris FR	150	
	Cedefop, Thessalonika EL	92	
	ETF, Turin IT	88	
	ECDC, Stockholm SE	182	
	EFSA, Parma, IT	323	
	EMA, London UK	596	
	Frontex, Warsaw PL	352	
	Europol, Den Haag NL	550	
	CEPOL, Budapest HU	31	
	EMCDDA, Lisbon, PT	77	
	LISA, Tallinn EE	131	
	EASO, Valletta MT	155	
	CdT, Luxembourg	195	
	ACER, Ljublanja SI	68	
	FRA, Vienna AT	72	
	EIGE, Vilnius LT	27	
	EuroJust, Den Haag NL	208	
	F4E, Barcelona ES	283	
	SESAR joint undertaking	39	
	EIT, Budapest HU	41	
	EASME	110	(ex-EACI)
	EACEA	110	
	CHAFEA, LU	17	(ex-EAHC)
	INEA	68	(ex-TENTEA)
	ERCEA	118	
	REA	167	
	BBI joint undertaking	.	
	CS2 joint undertaking	.	
	CPVO, Angers FR	.	
	ECSEL joint undertaking	.	(ex-ARTEMIS, ex-ENIAC)
	EDA	.	
	EUISS, Paris FR	.	
	EUIPO, Alicante ES	.	(ex-OHIM)
	SatCen, Madrid ES	.	
	FCH2 joint undertaking	.	
	IMI2 joint undertaking	.	
	SRB	.	
IV	Court of Justice	2,063	
V	Court of Auditors	712	
VI	Economic and Social Council	665	
VII	Committee of the Regions	489	
VIII	Ombudsman	65	
IX	Data Protection Supervisor	56	
X	External Action Service	1,611	
	TOTAL	45,660	



FAMILY BUDGET SURVEY 2017

Harmonized surveys are conducted jointly by Eurostat (the Statistical Office of the European Communities) and the ISRP (International Service for Remunerations and Pensions). The purpose is to collect specific information on spending in order to estimate an average expenditure pattern for international staff and their families in each duty station.

The resulting pattern is an essential element in the calculation of post adjustments, purchasing power parities (PPP) and the correction coefficients (CC) applicable to the salaries of European Union officials, Co-ordinated Organisations staff, as well as other International Organisations, such as the European Patent Office.

The results of this survey will affect your salaries, and you therefore have a direct interest in completing the survey. Only you have the necessary information to evaluate your household expenditure, which is the object of the survey.

Please note that the aim of the survey is not to know what you spend your money on, but how you spend it. This means that the pattern of your expenditure will allow us to give adequate importance to different items in a basket of goods and services at the time of calculating the PPP.

The information you provide will remain completely anonymous. Its origin cannot be traced, since there is no name or number on the questionnaire. No basic data from the questionnaire will be communicated to unauthorised persons.

The information provided will be combined with that of other officials in order to calculate the average consumption structure of international officials in your place of employment. Therefore, in order to obtain statistically viable results, a large number of replies is vital.

Before you begin to fill in the questionnaire, please read the detailed instructions carefully at the start of each section.

If you have any questions, please first refer to the Frequently Asked Questions and then contact ISRP at sirp.fbs@oecd.org or Eurostat at estat-c3-fbs@ec.europa.eu.

IMPORTANT GENERAL GUIDELINES

- You do not need to complete the questionnaire if you do not live in your country of employment. See FAQ #32 for details.
- Please take the necessary time to complete all sections of the questionnaire. Remember that an incomplete questionnaire is not likely to be usable, and your efforts will be wasted. If you forget to record the purchase of a bus ticket or a newspaper, this will have little impact on the overall quality of the results; however, your best estimate for an expense is better than leaving a blank.
- If you cannot find an expense item in one of the boxes provided, please consult the glossary at the end of the survey which indicates where certain items are classified.
- Use the section 5 "OTHER EXPENSES" to specify as much as possible the nature and the amount of your expenditure.
- You can save the partially completed questionnaire at any time and recover it later for completion.
- **Please note that we assume all expenditure you report in the survey is in the currency of your country of duty station. For 'Purchases OUTSIDE the country of duty station', please indicate the currency from drop-down list.**

SECTION 1: PERSONAL INFORMATION AND DWELLING INFORMATION (INCLUDING RENT/MORTGAGE)

An * denotes a mandatory field.

The information provided in this section is essential to validate the survey results and to aggregate them to the total population of international officials in your place of employment.

Dwelling information relates solely to your main dwelling in your country of residence.

As the accommodation cost is a very important element in the calculation of correction coefficients, it is essential that all related questions are answered and that the total area of living space be filled in accurately.

- If you are a **tenant**, please record your current monthly rent, excluding charges for utilities and other services such as common lighting, elevator, etc. (exclude also long term hotel, boarding house, shared rentals);
- Exclude any payments for garages, unless this is an integral part of your rent. Service and utility charges are shown in Section 2 (Dwelling related regular bills) of the questionnaire;
- If you are the **owner** of your accommodation and if you bought it on a mortgage or any other loan, please state your current monthly loan payment (capital plus interest), but excluding any life insurance.

Basic information

*Country of employment:

*City of employment:

*Institution/agency/organisation:

*Expatriate, according to Staff regulations: Yes No

*Status: Official/permanent employee
 Temporary agent
 Contractual agent
 Other

*Function group and grade:

* Number of persons in your household:
(Include only household members who normally share your accommodations at the duty station for at least half of the year. Students abroad or other members living regularly outside the duty station should NOT be reported at the duty station)

Adults (including yourself) AT the country of duty station

* If you have no household members in these categories please enter 0

Dependent children AT the country of duty station

Adults staying OUTSIDE the country of duty station

Dependent children staying OUTSIDE the country of duty station

TOTAL:

*Is any member of your family besides yourself working? Yes No

*Is your salary 50% or more of the total family income? Yes No

Dwelling Information

*Country of residence:

*Housing: Tenant Owner

*Monthly rent:

*Monthly loan reimbursement:

*Type of dwelling: Detached house
 Semi or non-detached house
 Apartment
 Studio or flat
 Other (hotel, etc.,)

*Number of bedrooms:

*Estimated total area or living space: square meters square feet
 (excluding garage, balcony, cellar)

SECTION 2: DWELLING RELATED REGULAR BILLS (EXCLUDING RENT/MORTGAGE)

This section concerns your main regular bills such as telephone, electricity, etc. Please record the amount which you currently pay on an average monthly basis, or over the last 12 months. Please also indicate "yes" if these bills are included in your rent, (previously listed in Section 1).

Regular bills should relate to your primary dwelling in your country of residence only.

If you own a dwelling for investment purposes in your country of residence (i.e. if usually rented out), related costs should not be recorded in this survey.

If you own or rent a second home outside your country of residence, please record related expenditure in section 5.

If there is no expenditure for one group, please enter '0'.

Dwelling related regular bills (in your country of residence)

	Expenditure in an average month OR...	Expenditures in the last 12 months	Included in rent? (Y/N)
1. *Charges for dwelling(s) Excluding rent: (communal building charges, charges including rubbish and sewerage collection)			
2. *Water supply (if not included in charges for dwelling)			

	Expenditure in an average month OR..	Expenditures in the last 12 months	Included in rent? (Y/N)
3. *Electricity			
4. *Gas (town and natural gas, including meter charges)			
5. *Solid and liquid fuel for domestic heating and other types of heating energy			
6. *Garage (for main residence use)			
7. *Telephone fixed/mobile and internet bills (excluding purchases of equipment)			
8. *Cable/Satellite TV subscription fees			
9. *Local, TV and housing taxes			

SECTION 3: AVERAGE MONTHLY OR YEARLY HOUSEHOLD EXPENSES

In this section you are asked to record, for a typical 1 month period (including weekends), your own expenditure as well as the expenditure of the other members of your household on food and food-related items, non-alcoholic beverages, alcoholic and tobacco products, restaurants and canteens.

Question 14 "Restaurants, cafes, bars, take-away" refers to purchases of food, beverages, ice creams, etc. in any of these places, or when delivered to your home/office.

The main purpose of the survey is to estimate average annual expenditure of households in your country of residence. Each question allows you to include your purchases either over an average month, or in the last year, inside the country of your duty station. Any private expenditure in another country should be recorded under "Purchases OUTSIDE the country employment", including the amount and currency.

For questions 10 and 11 (Food and non-alcoholic beverage), if there is no expenditure for one group, please enter '0'.

The consumption pattern will be calculated on the basis of annual expenditure. Therefore, if you enter a monthly amount, the questionnaire will automatically calculate your expenses over the 12 month period on this basis.

Purchases via Internet: All purchases made via Internet are considered as expenses made in your country of residence, provided the purchased goods are delivered to your country of residence.

If you cannot find an expenditure item in one of the boxes provided, you can search the glossary, or record this in section 5 "Other expenses".

Food and non-alcoholic beverages

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
10. *Food				
11. *Non-alcoholic beverages (soft drinks, coffee, etc.,)				

11 bis - Are non-alcoholic beverages expenditures (Q11) included in food expenditures (Q10 - Food) ? Yes

Tobacco and alcoholic beverages

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
12. Alcoholic beverages (beer, wine, spirits, etc.,)				
13. Tobacco, e-cigarettes (cigarettes, cigars, e-cigarettes, etc.,)				

Meals purchased outside of household

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
14. Restaurants, cafes, bars, take-away				
15. Canteens (at workplace and schools)				

Plane Tickets & Holidays Specific Guidelines

Air tickets purchased in your country of residence should be recorded in Question 20 (planes), while a package holiday purchased at travel agencies or online within your country of residence should be recorded in Question 71 (package holidays). A hotel bill paid in a foreign country should be recorded under "Purchases OUTSIDE the country duty station", including the amount and currency.

Public Transport	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
16. Local public transport (metro, bus, tram, suburban trains)				
17. Taxi				
18. Trains (excluding suburban trains)				

Public transport

Public transport	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
19. Coaches				
20. Planes				
21. Ferries				
22. Combined passenger transport (by two or more modes of transport, e.g. "fly and drive", etc.,)				
23. Other purchased transport services (cable car, removal and storage services, left luggage, etc.,)				

Cars Specific Guidelines

We are looking for the **net expenditure** on vehicles. Therefore, if you have purchased car(s), new or second-hand, over the **last 5 years**:

- record in box 24a **the actual price you paid for all cars** over that period (exclude loan interest if you purchased any vehicle on credit), and;
- record in box 24b the sale price of the car(s) you sold over the same period.

Private transport

	TOTAL AMOUNT OVER THE LAST 5 YEARS
24a. Price paid for all cars purchased	
24b. Sale price for cars sold over the same period	
25. Motorcycles, scooters and bicycles	

Other expenses on private transport

	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
26. Tyres, spare parts, accessories and articles for cleaning				
27. Fuel				
28. Maintenance and repair of personal transport equipment				
29. Hire of vehicles, driving school, tolls and public parking				

Individual expenditure for main (and other) dwelling(s) in your country of residence

	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
30. Major repairs and refurbishments				
31. Products and services for minor repairs and maintenance				
32. Home alarm (installation, maintenance and service fees)				

Furniture and other household products

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
33. Furniture and furnishings (beds, tables, lighting equipment, interior decorating, etc.,)				
34. Carpets and other floor covering				
35. Household textiles (curtain material, pillows, futons, blankets, towels, etc.,)				
36. Glassware, tableware, household utensils				
37. Non-durable household products (detergents, cleaning products, etc.,)				

Electrical appliances and electronic equipment

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
38. Major household appliances including heating/cooling appliances (refrigerators, washing machines, space heaters, water boiler, etc.,)				
39. Small electric household appliances (coffee mills, fans, kettles, etc.,)				
40. Audiovisual equipment (TV, CD player, radio, video recorder, DVD player, etc.,)				
41. Photographic and cinematographic equipment (still cameras, camcorders, film projectors, etc.,)				

Electrical appliances and electronic equipment

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
42. Information processing equipment (computers, printer, tablet, etc.,)				
43. Telephones, answering and fax machines				

Leisure, sports, recreation, culture

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
44. Cinema, theatre, concerts, dancing, museum, zoo				
45. Recreation and sporting activities (sports clubs, sporting events, sport and dance lessons, etc.,)				
46. Recording media (DVD, CD, video, CD-Roms, films, etc., used for recording or data storage)				
47. Photographic services (film development, enlarging, wedding photography, etc.,)				
48. Musical instruments				
49. Durable goods for indoor and outdoor recreation (camper vans, boats, horses and related equipment, table tennis tables, etc.,)				
50. Equipment for sport, camping and open-air recreation (balls, nets, rackets, skis, fishing rods, tents, sleeping bags, etc.,)				

Leisure, sports, recreation, culture

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
51. Tools and equipment for house and garden (electric drills, shovels, door fittings, small electrical accessories, etc.,)				
52. Toys, games				

53. Gardens, flowers, plants				
54. Pets, pet food and related services				

Clothing and footwear

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
55. Men's coats and jackets				
56. Other men's clothing (trousers, shirts, etc.,)				
57. Women's coats and jackets				
58. Other women's clothing (trousers, shirts, etc.,)				
59. Boy's and girl's clothing (including babywear)				

Clothing and footwear

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
60. Clothing accessories (gloves, ties, scarves, hats, belts, etc.,)				
61. Footwear for men, women and children				

Personal care and miscellaneous goods

	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
62. Hairdressing, beauty care for men and women (solarium, sauna, etc.,)				
63. Electric appliances (electric razors, hairdryers, etc.,)				
64. Cosmetics (cream, make-up, etc.,)				
65. Other goods for personal care (soap, toothpaste, perfumes, shampoo, etc.,)				
66. Jewellery, clocks and watches				
67. Travel goods (suitcases, handbags, travel goods, pram/stroller, etc.,)				

Books, newspapers, magazines

	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
68. Books				
69. Newspapers, magazines				
70. Miscellaneous printed materials and stationery				

Holiday services

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
71. Package holidays				
72. Hotels, motels, camping, holiday rental				

Domestic services, dry cleaning

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
73. Domestic services (cleaner, gardener, baby-sitter, etc.)				
74. Dry cleaning and laundry				

Repairs

	PURCHASES <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
75. Repair of furniture, furnishings, and carpets				

76. Repair of household appliances and electronic equipment				
77. Maintenance or repair of musical instruments and recreation durables				
78. Shoe repairs				
79. Clothing repairs				

Insurance and other services

	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
80. Vehicle insurance				
81. House/flat insurance				
82. Health and accident insurance (complementary basic medical insurance)				
83. Postal services, stamps, parcels				
84. Financial and other services (bank charges, money transfer fees, expenditure on passports, fees for legal services, etc.,)				

SECTION 4: EDUCATION AND HEALTH

This section concerns your education and health expenses. Please input your total expenditures in your country of residence, before reimbursements, as well as any reimbursements made by the employer, in either the last 12 months or on an average monthly basis.

Education

	PURCHASES INSIDE THE COUNTRY OF EMPLOYMENT		PURCHASES OUTSIDE THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
85. Primary, Secondary, Tertiary education (before reimbursements)				
85a. Tuition and enrolment fees				
85b. Board, lodging and school meals				
85c. Books and supplies				
85d. Group transportation				
85e. Total of above if breakdown not known				
86. Crèche, playschool, kindergarten, day care (Tuition and all other costs)				
87. Music and language courses				

Reimbursement - Important Guidelines

Please note that it is important to record any reimbursement that you receive from your employer related to education in questions 85, 86 and 87 above.

This will allow us to establish the average education costs ultimately sustained by staff (i.e. the overall education expenses minus any reimbursements that you may have received).

88a - Do you receive an education allowance from your Organisation ? Yes

	EDUCATION REIMBURSEMENT <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		EDUCATION REIMBURSEMENT <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Monthly education allowance received OR...	Total amount of reimbursement over the last 12 months	Amount in the last 12 months	Currency
88. Monthly education allowance received or total amount of reimbursement during the past 12 months				

Health expenses

	<u>PURCHASES</u> <u>INSIDE</u> THE COUNTRY OF EMPLOYMENT		<u>PURCHASES</u> <u>OUTSIDE</u> THE COUNTRY OF EMPLOYMENT	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
89. Medical, dental, paramedical services, hospital and out-patient				
Expenditure				
Reimbursement				
90. Prescription and non-prescription drugs and vitamins				
Expenditure				
Reimbursement				
91. Therapeutic appliances and equipment, other medical supplies				
Expenditure				
Reimbursement				

SECTION 5: OTHER EXPENSES

Other expenses

This section concerns expenses in your country of residence for which you have not found an appropriate box in the questionnaire or the annexed glossary, or expenses outside your duty station country. In that case, you may note these expenses in the boxes below with a short description of the related expenditure.

DESCRIPTION	PURCHASES <u>INSIDE</u> THE COUNTRY OF DUTY STATION		PURCHASES <u>OUTSIDE</u> THE COUNTRY OF DUTY STATION	
	Expenditure in an average month OR...	Expenditure in last 12 months	Amount in the last 12 months	Currency
92.				
93.				
94.				
95.				
96.				
97.				
98.				
99.				
100.				

Comments:

Please use this space to record your own comments. Any additional information or comments on the questionnaire or its contents, as well as your comments on general availability of products and other aspects of shopping at the duty station, will be helpful.

Thank you very much for your participation.

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