



Eurostat metadata

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For any question on data and metadata, please contact: [Eurostat user support](#)

1. Contact

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1.1. Contact organisation	National Institute of Statistics
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2. Statistical presentation		Top
2.1. Data description		
<p>The main focus of the Household Budget Survey (HBS) is Consumption Expenditure, though Household Characteristics and to some extent Income, are also covered.</p> <p>HBS micro-data can be used to measure economic well-being.</p>		
1. Title of the survey		
Household Budget Survey		
2. Title of the survey at a National level		
Ancheta Bugetelor de Familie		
3. Year of the survey		
2020		
4. General comments about the survey		

The Household Budget Survey (HBS) provides the information necessary for assessing the population income, expenditure and consumption.

5. National questionnaire (Please provide a hyperlink and/ or provide it in an Annex)

<http://80.96.186.4:81/metadata/viewStatisticalResearch.htm?researchId=5457>

2.2. Classification system

Name	Version Used
COICOP	COICOP 2018
NUTS	NUTS 2016 (level 2)
ISCED	2011
ISCO	ISCO08
NACE	NACE rev. 2
Other	

2.3. Coverage - sector

Sector coverage (if it is not households)

Households

List the variables which deviate from the standard definition specified in the Transmission document HBS 2020 (including national concepts, method of calculation, and differences between national concepts and standard HBS concepts)

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2.4. Statistical concepts and definitions

1. Consumption expenditure

For the purpose of measuring living conditions the essential reference for the HBS is the concept of household consumption expenditure, that is, the expenditure incurred by private households on individual consumption goods and services.

For further details concerning Consumption Expenditure, the reader is referred to the HBS methodology:

http://ec.europa.eu/eurostat/cache/metadata/Annexes/hbs_esms_an1.pdf

Consumption Expenditure approaches applied

Actual final consumption	Final consumption	Monetary final consumption	Other
	x	x	

2. Income

Yearly income:

Income in kind from employment	Income in kind from non-salaried activities	Imputed rent	Monetary net income	Total net income
x	x	x	x	x

Monthly income:

Net current monthly household income

x

3. Imputed rent

Self-assessment	Stratification	Log-linear regression	Heckman regression	User cost	Other (indicate)
x					

Variables used

4. Other definitions, explanations, comments

2.5. Statistical unit

The basic unit of data collection and analysis in an HBS is the household. A household is a social unit which meets one or more conditions of “living together” in addition to sharing a common accommodation.

1. Definition of Household used:**Household defined as persons sharing**

Accommodation	Expenditure	Income	Family or emotional ties
x	x	x	x
Other			

2. Definition of Household member used:**Household membership**

Usually resident, related to other members	Usually resident, not related to other members	Resident border, tenant	Visitor	Live-in domestic servant, au pair	Resident, absent from dwelling in the short-term	Children in household in education away from home	Long-term absence with household ties: working away from home	Temporary absence with household ties: in hospital, nursing home or other institution
x	x	x		x	x	x	x	x
Other								

3. Definition of Reference Person

In the context of the EU HBS surveys, a 'Reference person' is the Household member (≥ 16) who contributes most to the total income of the household.

Definition of Reference Person used, if different from the above

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2.6. Statistical population

All the HBSs aim to measure **private household** expenditure.

- In this respect, **collective households** (elderly homes, hospitals, establishments for the disabled, boarding schools, military barracks, jails, and welfare institutions including those for the homeless, asylum seekers or refugees) are normally excluded from the survey. Exceptions, are listed below:

Not included in the survey are the persons with permanent residence in common living facilities (homes for old or disabled people, living establishments for workers, sanatoriums etc.). No other exclusion are made.

- All private households and their members should be considered in the statistical population. Exceptions, are listed below:

2.7. Reference area

The survey was conducted based on a sample of households, from urban and rural area, randomly selected from all counties and from Bucharest Municipality. (792 survey centres spread over all counties and all districts of Bucharest Municipality (450 in urban area and 342 in rural area)

2.8. Coverage - Time

Data are collected monthly. The results are disseminated quarterly and annually.

2.9. Base period

Annual

3. Statistical processing

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3.1. Source data

1. Sampling frame name

The Master Sample EMZOT (Multifunctional Sample of Territorial Areas)

2. Data source used for building the sampling frame

The master sample EMZOT was designed on the basis of the information provided by the Census of the Population and Dwellings from 2011, aiming to obtain a sampling reserve for the household surveys to be conducted in the inter-censal period.

3. Frequency and the year of the last update of the data source

EMZOT is usually up-dated in between the two consecutive censuses (10 years). Last update was in 2011.

4. Sample design of the survey

Ultimate sampling unit(s)	Household	x
	Other	

Probability sampling	x
Sampling design used	HBS sampling design has been founded on a two-stage sampling technique. The sampling plan is a two-stage probability sampling of clusters of housing units.
Oversampled populatons	

3.2. Frequency of data collection

The Household Budget Survey is organized as a continuous quarterly survey for a period of 3 consecutive months, on a sample of 9504 permanent dwellings, distributed in independent monthly subsample of 3168 permanent dwellings each.

3.3. Data collection

1. Reference year: 2020

2. Survey instruments: interview and diary

2.1. Interview	x
Traditional face-to-face interview, pen and pencil (PAPI)	x
Telephone interview (CATI)	
Computer-assisted personal interview (CAPI)	
Self-completed computer-based interview (CASI)	
Self-completed web or mobile app based interview (CAWI)	
Other sources (e.g. administrative data). Please list variables	
Items covered in the interview	

Recording period	calendar month
Recording unit (household; household member)	x
Diaries	x
Traditional Pen and Paper diary	x
Computer-based Diary	
Web-Diary	
Cash Register Receipts	
Receipt Scanner	
Loyalty-Scheme cards/ metadata	
Other (e.g. Administrative Data, please list variables)	
Items covered in the diary	
Recording period	calendar month
Recording unit (household; household member)	x
3. Additional remarks about the Data collection	
<p>For the collection of information, two types of forms were used: the household's questionnaire and the household's journal. Data registration in the questionnaire was done based on interview, while for the household's journal through self-registration and interview.</p>	
3.4. Data validation	
Basic Data validation workflow	
<p>The processing and the validation of data from the HBS is effectuated in two stages: - at the local level: which consist in manual codification of survey questionnaires, data entry, the logical control and the validation of data from the research centre, using 928 conditions of logical control;</p>	

- at the central level: the validation of the data received from the counties, the centralization processing and the elaboration of the presentation tables of the results with non-weighted and weighted data (93 quarterly tables with the weighted data/544 yearly tables with non-weighted and weighted data).

3.5. Data compilation

1. Calculation of the household design weights

The weights are calculated in three steps.

In the first step, basic weight is obtained by assigning the inverse of the general selection probabilities to each sampled dwelling unit.

2. Weight adjustments for non-response at household level

In order to cover the share of households that refuse to take part in the survey, in the second step we adjust for non-response at strata level, categorising the responding dwelling units by the following characteristics: county (NUTS 3 level) and urban/rural residency.

3. Any other weight adjustments

3.6. Adjustment

Weight adjustments to external data sources (calibration)

In the third and final steps, a re-weighting is performed in order to improve the estimation quality. This consists of calibrating the secondary weights to the best latest available population totals by region / urban-rural residency, gender, 8 age groups and the households totals by region (NUTS 2 level), using the SAS macro Calmar. The current demographic statistics, available at 1st of January and 1st of July survey year are used to calibrate the estimates.

Each person belonging to a respondent household is receiving the household weight.

4. Quality management

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4.1. Quality assurance

The National Institute of Statistics of Romania follows the principles in the Code of Practice for European Statistics (CoP) and uses the Quality Assurance Framework of the European Statistical System (ESS QAF) for the implementation of the principles. This involves continuous decentralized and central control of products and processes based on documentation following international standards.

4.2. Quality management - assessment

Through the programs of data entry and logical control of information, taken from the survey questionnaire, are searched the possible errors and then corrected. The corrections are made taking into consideration the type of errors recorded and the reason of their appearance, the errors may be:

- of data entry – in case which the information was wrongly processed from the questionnaires;
- of registering – when the information was wrongly coding in questionnaires.

The IT application work in VISUAL FOXPRO 6.0 and it has in its structure two modules with the following functions:

The local module which achieve:

- sample selection with dwellings of the month of processing;
- data entry from the survey questionnaire;
- data validation according with some correlations previous established;
- integrity control of introduction of data;
- verification through price of introduction data in sections of products.

Other types of verifications are made using some programs of control between sections. The control programs are based on data analysis bound programs, such as: the income name from section SVE-„Net incomes” and data recorded in other sections (for example: with occupational status, level of education, age, receipts etc.); or names of products obtained in own production from section SPRO-„Incomings and outgoings of agricultural products and food in/out household” and other sections of the questionnaire

5. Relevance

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5.1. Relevance - User Needs

Users:

A) Internal: The Presidential Administration of Romania, The Parliament of Romania, The Government of Romania, The Ministry of Labour and Social Protection, The Ministry of Economy, The Ministry of Public Finance, The Ministry of Regional Development and Public Administration, The National Bank of Romania, other ministries and institutions of public administration, education, research institutes, other users.

B) External: EUROSTAT, World Bank, International Monetary Fund, UNICEF.

5.2. Relevance - User Satisfaction

Number of data requests and the number of visits to online database.

5.3. Completeness

Except HJ "Cross border consumption expenditure", all the others variables required for transmission have been included in microdata. Household's consumption expenditure [HE] were initial transmitted at 2 digits because we used COICOP 2018. In a second step, as soon as possible we will transmit the HE at 5 digit level.

5.3.1. Data completeness - rate

Groups of HBS 2020 variables	Total number of Variables per sub-group	Number of delivered Variables per sub-group	%
<i>Basic variables at household level</i>			
[HA] Identification, weighting, demographic characteristics	7	7	100
[HC] Basic demographic characteristics of the reference person	7	7	100
[HH] Income	6	6	100
[HI] Main source of the household's income	2	2	100
[HE] Household's consumption expenditure	476	13 * we will transmit detailed as soon as possible	2.7
[HJ] Cross border consumption expenditure	14	0	0
[HQ] Household's consumption in Quantities	87	83	95.40
<i>Derived variables at household level</i>			
[HB] Household size and equivalent size	10	10	100

Type of household	4	4	100
[HC] [HD] Activity and economic situation	4	4	100
Basic variables at member level			
[MA] Identification, weighting, demographic characteristics	2	2	100
[MB] Basic demographic characteristics of households members	14	14	100
[MC] Education	3	3	100
[ME] Activity	7	7	100
[MF] Income	1	1	100
Total	644	163	25.31

6. Accuracy and reliability

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6.1. Accuracy - overall

Like in any sample survey, the statistics generated from the HBS data may be liable to errors which are inherent in the survey method used. Usually, a sample of households is selected in a way that the probability of a household being selected is known. In this way, the results can be reliably projected from the sample to the household reference population with known levels of precision, i.e. standard errors and confidence intervals for survey estimates can be constructed.

The HBS data are weighted. Sample weights are needed to correct for imperfections in the sample that might lead to bias and also to rectify other departures between the sample and the reference population. The design weights are calculated for each sampled household as the inverse of its probability of selection as part of the sample.

Main sources of random and systematic errors in the statistical outputs and summary assessment of all errors with special focus on the impact on key estimates.

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Unit response rate	81,2%
Item response rate	not applicable

6.2. Sampling error

Sampling errors are the part of the difference between a population value and an estimate thereof, derived from a random sample, which is due to the fact that only a subset of the population is enumerated. The size of the sampling error depends on the sample size: the higher the sample size, the higher the accuracy. In the past, in comparison to other EU household surveys, e.g. Labour Force Survey (LFS) or Statistics on Income and Living Conditions (EU-SILC), the HBS sample sizes attained have been rather low. Furthermore, the effective sample size can be even smaller as a result of the way the sample has been designed.

6.2.1. Sampling error - indicators

1. Achieved sample size

28917

Eurostat will calculate the Effective Sample Size, Deff and estimate the Variance, as well as calculate the structure of household consumption expenditure and Confidence Interval for all the Countries that deliver 2015 HBS micro-data, using the same method as for the 2005 and 2010 waves, to ensure comparability of these data between countries.

Another key HBS indicator is the structure of household consumption expenditure: this is the distribution of the total mean expenditure between the different 2-digit COICOP groups. This indicator is essential to examine how households split their expenditures among the COICOP categories, and to monitor how the structure can be affected over time by price changes.

2. Comments on Sampling errors and measures to reduce them

6.3. Non-sampling error

6.3.1. Coverage error

Coverage error measures the divergence between the frame population and the target population.

- Frequency and timing of frame updates

Not applicable

- Errors due to the discrepancies between the sampling frame and the target population and sub-populations (over-coverage, under-coverage, misclassifications).

6.3.1.1. Over-coverage - rate

Not applicable.

6.3.1.2. Common units - proportion

Not applicable.

6.3.2. Measurement error

- Description of efforts made in questionnaire design and testing.

The questionnaire is designed taking into account:

- experienced old questionnaires - all the problems occurred in the field regarding the questions in the household's questionnaire or in the diary;
- the observations made by institutions which saw the questionnaires before finalised them for the next year

- Description of interviewer training.

For the data collection in the field are used 792 interviewers. Most of them are experienced, working at this survey for many years. The new ones are trained before the data collection start.

The interviewers have a manual that contain information about:

- objective of the survey;
- organization of the survey;
- field work aspects (how to contact the household, how to introduce oneself, who answer to the questions etc.);
- content and correct completion of the questionnaires;
- the COICOP content and codification.

- Proxy interview rates.

not applicable

6.3.3. Non response error

1. Reasons for non-response

The household was contacted, but refused the interview;
The household left the town all month;
The household was present but impossible to be contacted.

2. Characteristics of non-respondents.

not applicable

3. Achieved Household response rates (%)

75.7

4. Efforts to reduce non-response

For the respondent we have a letter introducing the survey.
The interviewers are trained periodical.
The interviewers are making several visits.

5. Adjustment of weights in order to reduce non-response.

Unit non-responses are adjusted in the weighting procedure by:

- re-weighting with the inverse of the response rate on response homogeneous groups. These groups were built by the combination of the following variables: county and residence area of the household (stratum).
- re-weighting by calibration of the weights.

6. Comments regarding non-response errors

6.3.3.1. Unit non-response - rate

1. Unit non-response rate overall and at an appropriate level of detail

18.8%

2. Use of substitute Households to replace non-responding households

Gross sample size	not applicable
Number of eligible units	not applicable
Number of units successfully contacted – BEFORE SUBSTITUTION	not applicable
Number of units successfully contacted – AFTER SUBSTITUTION	not applicable
Number of responding households – BEFORE SUBSTITUTION	not applicable
Number of responding households – AFTER SUBSTITUTION	not applicable
Response rate before substitution	not applicable
Response rate after substitution	not applicable

3. Qualitative assessment of the bias associated with nonresponse.

not applicable

6.3.3.2. Item non-response - rate

1. Item non-response rate in the survey

not applicable

2. Qualitative assessment of the bias associated with nonresponse
not applicable
6.3.4. Processing error
Comments regarding Processing Error
not applicable
6.3.4.1. Imputation - rate
Percentage of imputed values of all possible values
not applicable
6.3.5. Model assumption error
<i>Not applicable.</i>
6.4. Seasonal adjustment
<i>Not applicable.</i>
6.5. Data revision - policy
Comments regarding Data Revision Policy
not applicable
6.6. Data revision - practice
Comments regarding Data Revision Practice
not applicable
6.6.1. Data revision - average size
<i>Not applicable.</i>
7. Timeliness and punctuality
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7.1. Timeliness	
Data Collection Year	Data Published Year
2020	2021
7.1.1. Time lag - first result	
Time lag for the first published results, in terms of months	
6 months	
7.1.2. Time lag - final result	
Time lag for the final published results, in terms of months	
6 months	
7.2. Punctuality	
Date of dissemination of national results	22.06.2021
The number of months between the actual delivery of the data to Eurostat and the announced date for delivery	
7.2.1. Punctuality - delivery and publication	
<i>Not applicable.</i>	

8. Coherence and comparability		Top
Comparability means measurement of the impact of differences in applied statistical concepts, measurement tools and procedures where statistics are compared between geographical areas or over time.		
8.1. Comparability - geographical		
Comments regarding Comparability - geographical		
not applicable		
8.1.1. Asymmetry for mirror flow statistics - coefficient		

Not applicable.

8.2. Comparability - over time

Comments regarding Comparability - over time

Starting with 2014 the weighted data was estimates based on resident population and the results are not comparable to the previous ones.

8.2.1. Length of comparable time series

Not applicable.

8.3. Coherence - cross domain

1. Comparison with EU-SILC

Eurostat will calculate various indicators based on the HBS micro-data and compare these with similar indicators based on EU-SILC data. These indicators include:

- At-risk-of-poverty threshold (EUR)
- At-risk-of-poverty rate (%)
- Relative at-risk-of-poverty gap
- Income quintile share ratio S80/S20
- Gini coefficient

2. Comparison with HICP

Eurostat will calculate the structure of Consumption Expenditure at 2-digit COICOP level using HBS micro-data and compare these with similar values based on HICP data

3. Additional comments regarding cross-domain coherence

HBS collects information regarding current income, as for EU-SILC collect information about the income for the year before the year of data collection. To compare poverty indicators calculated based on the two surveys (HBS and EU-SILC) should be used the income from EU-SILC 2021 survey.

8.4. Coherence - sub annual and annual statistics

Not applicable.

8.5. Coherence - National Accounts

Eurostat will calculate the structure of Consumption Expenditure at 2-digit COICOP level using HBS micro-data and compare these with similar values based on NA data

8.6. Coherence - internal

not applicable

9. Accessibility and clarity

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9.1. Dissemination format - News release

Press Releases

<http://www.insse.ro/cms/en/comunicate-de-presa-view>

9.2. Dissemination format - Publications

“Coordinates of living standard in Romania. Population income and expenditure, in 2020”

https://insse.ro/cms/sites/default/files/field/publicatii/coordinates_of_living_standard_in_romania_population_income_and_consumption_in_2020.pdf

9.3. Dissemination format - online database

The online data base contains data series referring at the main HBS indicators. Also, to each indicator is attached metadata.

Tempo online database

<http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

9.3.1. Data tables - consultations

Not applicable.

9.4. Dissemination format - microdata access

Yes. NIS-Microdata access for scientific purposes

9.5. Dissemination format - other

not applicable
9.6. Documentation on methodology
NIS Metadata: http://80.96.186.4:81/metadata/viewStatisticalResearch.htm?researchId=5457
9.7. Quality management - documentation
https://insse.ro/cms/en/content/quality-national-statistical-system
9.7.1. Metadata completeness - rate
<i>Not applicable.</i>
9.7.2. Metadata - consultations
<i>Not applicable.</i>

10. Cost and Burden	Top
1. Cost to the NSI (€)	
The cost of interviewers for the year 2020 was around 600 thou. Euro (gross value). The interviewer was paid with 87 Euro (gross value) for four questionnaire fully completed per month.	
2. Burden on the Household (Hours)	
Taking into account the fact that the household must fulfil the diary during a month and has to participate at the interview for the household questionnaire, the amount of time spent in order to respond to the HBS questionnaires it is very difficult to estimate (around 10 hours).	
3. Measures to reduce Costs and Burden	
not applicable	

4. Recent efforts to improve efficiency and comment on the extent to which information and communication technology has been used

not applicable

11. Confidentiality

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11.1. Confidentiality - policy

During the entire flow of data collection, processing, storage, dissemination and archiving, the confidentiality of individual data collected for statistical purposes is respected in accordance with the legislation national and European, such as: Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation); Regulation (EC) No 223/2009 of the European Parliament and of the Council of 11 March 2009; COMMISSION REGULATION (EU) No 557/2013. of 17 June 2013; the European Statistics Code of Practice

11.2. Confidentiality - data treatment

The survey was performed under full anonymity. The data is disseminated so that it is not possible to identify individuals.

12. Comment

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In data collection 2020, was used COICOP 2018 as recommended initial. As year 2020 was strongly affected by the pandemic crisis, not all countries could collect data using COICOP 2018. The last recommendations was for countries that collect 2018 COICOP data to send in a first stage, total consumption expenditure HE00 as a minimum and in a second stage, a lower level of COICOP expenditures recorded into COICOP 2013 to the extent possible and, as soon as possible.

Annex Table 3 Net HH income summary stats: The data provided for EU-SILC are from 2020 but the reference period for the income is 2019.

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Table 3 Net HH income Summary Stats: comparison of HBS and EU-SILC	
Table 4 Population distribution by age group HBS vs EUSILC vs LFS	
Table 5 Estimated standard error, CIs and DEFF	

Table 3 **Net HH Income Summary**
States: comparison of HBS
with EU-SILC

	HBS	EU-SILC(EU Statistics on Income and Living Condition) *
Mean	3429.06	3282.19
Min	-372	-1424.36
Max	34000	26737.67
Median	2870	2618.50
CV%	1.20	1.53

*** The data provided for EU-SILC are from 2020 but the reference period for the income is 2019.**

Table 4: Population distribution by age group / HBS vs EUSILC & LFS Age Groups HBS EU-SILC (EU Statistics)

Age groups	HBS	EU-SILC	LFS
TOTAL	19314374	19314374	19314374
Y_LT30	5966822	6031988	6099102
Y30-44	4342784	4311895	4210503
Y45-59	4063004	3945974	4038988
Y_GE60	4941764	5024517	4965781

on Income and Living Conditions) LFS (Labour Force Survey)

Table 5

Estimated standard error, CIs and Deff

Indicator	Achived Sample size	Estimated value	Estimated coefficient of variation %	95% confidence	95% confidence	estimated
				interval -lower bound	interval -upper bound	design effect (Deff)
Mean total household consumption expenditure broken by:	28917					not available (N.A.)
Two -digit COPICOP division						
HE00	28917	39289	1.04	38488.93	40089.32	N.A.
HE01	28917	10863	1.05	10639.62	11086.83	N.A.
HE02	28917	2678.65	2.49	2547.72	2809.58	N.A.
HE03	28917	2258.94	2.82	2133.76	2384.11	N.A.
HE04	28917	12860.39	1.15	12570.81	13149.97	N.A.
HE05	28917	1973.99	2.68	1870.28	2077.71	N.A.
HE06	28917	1743.44	2.43	1660.17	1826.71	N.A.
HE07	28917	2045.73	3.39	1909.67	2181.78	N.A.
HE08	28917	1526.80	1.59	1479.26	1574.34	N.A.
HE09	28917	1104.140	4.40	1008.82	1199.46	N.A.
HE10	28917	93.916	10.87	73.87	113.97	N.A.
HE11	28917	343.678	6.47	300.03	387.32	N.A.
HE12	28917	1796.23	2.50	1708.11	1884.35	N.A.
Age of household's reference person						
less than 30	1001	40243.2	2.30	38427.91	42058.48	N.A.
30-44	4912	46449.35	1.30	45265.70	47632.99	N.A.
45-59	7380	44500.17	1.33	43337.34	45662.99	N.A.
60+ years	15624	29572.36	1.18	28889.01	30255.71	N.A.
Household type						
single person	11545	24361.27	1.18	23795.49	24927.04	N.A.
two adults	11177	37063.72	1.06	36295.61	37831.84	N.A.
three adults and more	1763	50049.87	2.16	47925.36	52174.37	N.A.

Single parent with dependent children	377	35376.48	3.42	33003.41	37749.55	N.A.
two adults with dependent children	3176	47749.07	1.32	46510.81	48987.33	N.A.
>= 3 adults with dependent children	879	52219.67	2.11	50057.72	54381.61	N.A.
Socio-economic category of the reference person						
Manual-worker except agriculture	7165	42815.39	1.09	41898.82	43731.96	N.A.
Non-manual worker except agriculture	3686	58949.09	1.35	57383.16	60515.02	N.A.
Self employed person and farmer or agricultural worker	2308	30782.96	2.61	29206.40	32359.52	N.A.
Unemployed	280	26258.96	6.78	22762.95	29754.97	N.A.
Retired	15155	28668.59	1.14	28028.35	29308.84	N.A.
Other inactive	323	27268.89	6.66	23704.72	30833.07	N.A.