

# SURVEY OF HOUSEHOLD INCOME AND WEALTH 1998

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### 1. Introduction

The Survey on Household Income and Wealth (SHIW) covers 7,147 households composed of 20,901 individuals and 12,717 income-earners. The number of households interviewed in previous surveys (*panel households*) was 2,669.

Panel households have the same questionnaire number (NQUEST) as in 1995.

Given that sampling design involves unequal stratum sampling fractions, the use of sampling weights (variable PESOFL in CARCOM98) is required to obtain unbiased estimates. Weights are given at household level since all members of the household have the same weight.

### 2. Data format

All the data are available in three different formats: **ASCII**, **SAS** and **STATA** (version 7 and above) formats. Data are compressed in one single zip archive named **INDxx\_format**, where **xx** denotes the last two digit of the survey year and **format** indicates whether the file is ASCII, SAS or STATA file. Data-files can be decompressed by using file manager (Windows XP) or any compression program such as **Winzip** or **WinRar**<sup>1</sup>.

All the ASCII files are "comma separated" (file CSV), the first row of the file containing the variable names. This feature reduces loading time for almost all statistical packages. These statistical packages load the data naming the variables according to the information in the first record.

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<sup>1</sup> Demo versions of those programs are available in the directory "varie" of the CD.

#### 4. Survey datasets

<b>Dataset</b>	<b>Content</b>	<b>Primary key</b>
RFAM98	Household Incomes	NQUEST
RISFAM98	Household Expenditure and Savings	NQUEST
RICFAM98	Household Wealth	NQUEST
RPER98	Individual Incomes	NQUEST NORD
CARCOM98	Characteristics of the individuals	NQUEST NORD
Q98A	Part a	NQUEST
LAVORO	Part b (Employment)(*)	NQUEST NORD
Q98C1	Part c.1 (Payment Instruments and Financial Assets)	NQUEST
Q98C2	Part c.2 (Payment Instruments and Financial Assets)	NQUEST
Q98D	Part d (Properties)	NQUEST
Q98E	Part e (Expenditures)	NQUEST
Q98F	Part f (Insurance)	NQUEST
Q98G	Part g (Information provided by the interviewer)	NQUEST
USCITI	Individuals that left the panel household	NQUEST NORDP
ROTAZ1	I round	NQUEST NORD
ROTAZ2	II round	NQUEST NORD
ALLB1	Annex b1	NQUEST NORD
ALLB2	Annex b2	NQUEST NORD
ALLB3	Annex b3	NQUEST
ALLB4	Annex b4	NQUEST NORD
ALLB5	Annex b5	NQUEST NORD
ALLB6	Annex b6	NQUEST NORD
ALLD1	Annex d1	NQUEST
ALLD2	Annex d2	NQUEST

(\*) Information on the prevalent status are contained in CARCOM98.

#### 3. Information contained in the datasets

The variable names and the answer codes are reported in the questionnaire contained in the documentation.

The primary key to merge household level information is NQUEST (household ID). NQUEST must be considered together with NORD (ID of each household member) to merge individual level information.

It is possible to link panel household information using NQUEST. At individual level, NQUEST must be used together with NORDP (ID of each household member in the previous wave).

The derived variables contained in RFAM98, RISFAM98, RICFAM98 e RPER98 are explained below.

The file CARCOM98 contains all the social-demographic characteristics of each household member and other important information:

- PESOFL = unit sampling weight (defined at household level)
- ETA = age (years)
- CLETA = age class (Up to 30 years, 31-40, 41-50, 51-65, more than 65 years)
- NCOMP = N° of household members
- NPERC = N° of household income earners
- PERC = income earner
- Q = working status (1=employee, 2=self-employed, 3=not-employed)

QUAL = employment status (1= blue-collar worker, 2= office worker or school teacher, 3= cadre or manager, 4= sole proprietor/member of the arts or professions, 5=other self-employed, 6=pensioner, 7=other not-employed)

SETT = branch of activity (1=agriculture, 2= industry, 3= public administration, 4= other sector, 5= not employed )

AREA3 = geographical area (1=North, 2= Centre, 3=South and Islands)

AREA5 = geographical area (1=North-east, 2= North-west, 3=Centre, 4=South, 5=Islands)

IREG = Istat code for region of residence (1=Piemonte, 2=Valle d'Aosta, 3=Lombardia, 4=Trentino, 5=Veneto, 6=Friuli, 7=Liguria, 8=Emilia Romagna, 9=Toscana, 10=Umbria, 11=Marche, 12=Lazio, 13=Abruzzo, 14=Molise, 15=Campania, 16=Puglia, 17=Basilicata, 18=Calabria, 19=Sicilia, 20=Sardegna)

NASCREG = region of birth (Istat code)

NASCAREA = geographical area of birth (1=North, 2= Centre, 3=South and Islands)

ACOM4C = town size (0-20.000 inhabitants, 20.000-40.000, 40.000-500.000, more than 500.000 inhabitants).

The file Q98A also includes:

CAPI = information collected through the CAPI (*Computer Assisted Personal interviewing*) (code 1).

Missing values (doesn't know, unwilling to answer, inapplicable) are indicated with ".".

## 4. Aggregate variables

Tav.1

### Aggregation of variables: income account

Variable name	Description <sup>(1)</sup>	Questionnaire reference <sup>(2)</sup>
Y	Net disposable income	
YL	Compensation of employees	
YL1	Net wages and salaries	B1/7
YL2	Fringe benefits	B1/8
YT	Pensions and net transfers	
YTP	Pensions and arrears	
YTP1	Pensions	B5/3a * B6/3b
YTP2	Arrears	B5/4
YTA	Other transfers	
YTA1	Economic assistance (wage supplem. etc.)	
YTA2	Scholarships	B6/d1
YTA3	Alimony and gifts	
YTA31	received	B6/(d2,d3,d4)
YTA32	paid (-)	E05(1,2)
YM	Net income from self-employment	
YM1	Income from self-employment	B2/6+ B3/6
YM2	Depreciation (-)	B2/10 + B3/10
YM3	Entrepreneurial income	B4/6+ B4/7
YC	Property income	
YCA	Income from buildings	
YCA1	Actual rents	D1/9 + D2/6
YCA2	Imputed rents <sup>(3)</sup>	
YCF	Income from financial assets <sup>(4)</sup>	
YCF1	Interest on deposits	Rate1*C/41(A,B)
YCF2	Interest on government securities	Rate 2*C/41(C)
YCF3	Income from other securities	Rate 3*C/41(D,E,F,G,H)
YCF4	Interest payable (-)	Rate 4*C/52(1,2)

$$Y = YL + YT + YM + YC$$

(1) A minus sign indicates the item is included with a negative sign in calculating the aggregate of which it is a component.

(2) The questionnaire reference is coded as follows: section or annex/question (where necessary, line of question).

(1) Excludes buildings used for self-employment.

(2) Interest rate \* capital stock.

**Tav.2****Aggregation of variables: use of income account**

Variable name	Description	Questionnaire reference <sup>(1)</sup>
Y	Net disposable income	
C	Consumption	
CD	Durables	
CD1	Expenditure for transport equipment	E/04(2) - E/06(2)
CD2	Expenditure for furniture, etc.	E/04(3)
CN	Non-durables	((E/01+ D/17)*12) + YL2 + YCR3
S	Saving <sup>(2)</sup>	

$$Y = C + S$$

(1) The questionnaire reference is coded as follows: section or annex/question (where necessary, line of question).

(2) Determined as a residual.

**Tav.3****Aggregation of variables: capital account**

Variable name	Description <sup>(1)</sup>	Questionnaire reference <sup>(2)</sup>
W	Net wealth	
AR	Real assets	
AR1	Real estate	D1/7*D1/2 + D/30*D/03 + D/34
AR2	Business equity	B2/9 + B3/9 + B4/9
AR3	Valuables	E/07(1)
PF	Financial liabilities (-) <sup>(3)</sup>	C/55(1,2) + B2/7(1,2) + B3/7(1,2)
Memorandum item:		
BD	Consumer durables	
BD1	Transport equipment	E/07(2)
BD2	Furniture, etc.	E/07(3)

$$W = AR + AF - PF$$

(1) A minus sign indicates the item is included with a negative sign in calculating the aggregate of which it is a component.

(2) The questionnaire reference is coded as follows: section or annex/question (where necessary, line of question).

(3) Incurred in acquiring real assets.