

SURVEY OF HOUSEHOLD INCOME AND WEALTH 2004

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1. Introduction

The Survey on Household Income and Wealth (SHIW) covers 8,012 households composed of 20,581 individuals and 13,341 income-earners. The number of households interviewed in previous surveys (*panel households*) was 3,604.

Panel households have the same questionnaire number (NQUEST) as in 2002.

Given that sampling design involves unequal stratum sampling fractions, the use of sampling weights (variable PESOFL in CARCOM04) 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**¹.

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.

¹ Demo versions of those programs are available in the directory "varie" of the CD.

3. Survey datasets

<i>Dataset</i>	<i>Content</i>	<i>Primary key</i>
RFAM04	Household Incomes	NQUEST
RISFAM04	Household Expenditure and Savings	NQUEST
RICFAM04	Household Wealth	NQUEST
RPER04	Individual Incomes	NQUEST NORD
CARCOM04	Characteristics of the individuals	NQUEST NORD
Q04A	Part a	NQUEST
LAVORO	Part b (Employment)(*)	NQUEST NORD
Q04C1	Part c.1 (Payment Instruments and Financial Assets)	NQUEST
Q04C2	Part c.2 (Payment Instruments and Financial Assets)	NQUEST
Q04D	Part d (Properties)	NQUEST
Q04E	Part e (Expenditures)	NQUEST
Q04F	Part f (Insurance)	NQUEST
Q02G	Part g (Information provided by the interviewer)	NQUEST
USCITI	Individuals that left the panel household	NQUEST NORDP
ROTAZ1	I round	NQUEST
ROTAZ2	II round	NQUEST
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

(*) Information on the prevalent status are contained in CARCOM04.

4. 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 RFAM04, RISFAM04, RICFAM04 e RPER04 are explained below.

The file CARCOM04 contains all the social-demographic characteristics of each household member and other important information:

PESOFI	= unit sampling weight (defined at household level)
CFRED	= head of household, defined as the major income earner
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 Q04A also includes:

CAPI	= information collected through the CAPI (<i>Computer Assisted Personal interviewing</i>) (code 1).
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All the amounts are expressed in euros

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

5. Aggregate variables

Tav.1

Aggregation of variables: income account

Variable name	Description ⁽¹⁾	Questionnaire reference ⁽²⁾
Y	Net disposable income	
YL	Compensation of employees	
YL1	Net wages and salaries	B1/8
YL2	Fringe benefits	B1/10
YT	Pensions and net transfers	
YTP	Pensions and arrears	
YTP1	Pensions	B5/4 * B5/5
YTP2	Arrears	B5/6
YTA	Other transfers	
YTA1	Economic assistance (wage supplem. etc.)	B6(b1,b2,b3,c1,c2,c3,c4,c5,c6,c7)
YTA2	Scholarships	B6/d1
YTA3	Alimony and gifts	
YTA31	received	B6/(d2a,d3,d4)
YTA32	paid (-)	E06(1,2)
YM	Net income from self-employment	
YMA1	Income from self-employment	B2/10 + B3/9
YMA3	Entrepreneurial income	B4/6 + B4/7
YC	Property income	
YCA	Income from buildings	
YCA1	Actual rents	D1/11
YCA2	Imputed rents ⁽³⁾	(D/20*12) + D1/12
YCF	Income from financial assets ⁽⁴⁾	
YCF1	Interest on deposits	Tasso1*C/24(A,B)
YCF2	Interest on government securities	Tasso2*C/24(C)
YCF3	Income from other securities	Tasso2*C/24(D,E,F,G,H)
YCF4	Interest payable (-)	Tasso3*C/31(a,b)

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

(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 ⁽¹⁾
Y	Net disposable income	
C	Consumption	
CD	Durables	
CD1	Expenditure for transport equipment	E/2(2) – E/4(2)
CD2	Expenditure for furniture, etc.	E/2(3)
CN	Non-durables	((E/7+ D/16)*12) + YL2 + YCA2
S	Saving ⁽²⁾	

$$Y = C + S$$

(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 ⁽¹⁾	Questionnaire reference ⁽²⁾
W	Net wealth	
AR	Real assets	
AR1	Real estate	D1/9*D1/2 + D/28*D/4 + D/33
AR2	Business equity	B2/16 + B3/15 + B4/9
AR3	Valuables	E/5(1)
AF	Financial assets (-)	
AF1	Deposits	C/24(A,B)
AF2	Government securities	C/24(C)
AF3	Other securities	C/24(D,E,F,G,H)
AF4	Trade credit or credit due from other households	B2/11(5) + B3/10(5) + C/32(1)
PF	Financial liabilities (-)	
PF1	Liabilities towards banks and finance companies	C/31(a,b,c,d,e) + B2/11(1,2,3) + B3/10(1,2,3)
PF2	Trade liabilities	B2/11(4) + B3/10(4)
PF3	Liabilities towards other households	C/32(2)
Memorandum item:		
BD	Consumer durables	
BD1	Transport equipment	E/5(2)
BD2	Furniture, etc.	E/5(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).