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Household budget survey (HBS)

Revision analysis

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1 Purpose of this document

Revisions of the Household Budget Survey (HBS) are continuously updated in the present document, providing an overview of all changes. A new chapter (dated with the HBS survey year in which the revision was introduced) with two sub-chapters ("Explanatory notes on the revision " and " Impact on results ") is created for each revision. Revisions are classified by most recent to oldest. This documentation was compiled as part of the FSO's new revision policy in 2020. Revisions carried out before 2020 have not always been documented in the same detail. However, they can be briefly explained in the last chapter.

2 HBS revision 2021: new concept and net health care expenditure

2.1 Explanatory notes on the revision

With the 2021 survey, health care expenditure and its reimbursement underwent a comprehensive revision in the household budget survey. One change is that all information related to health in the questionnaire is now incorporated into a single chapter. Another is that all healthcare expenditure on prescriptions and reimbursements are now recorded over a period of six months (the month of the survey and the previous 5 months) and then converted to monthly amounts. Until 2021, the expenditure of the survey month was recorded and only expenditure and reimbursements of more than CHF 300 were recorded over a six-month period.

This results in an increase in volume of both health care expenditure and reimbursements. The calculation of the results has therefore been revised in order to record and publish net health care expenditure as accurately as possible. In future, this should enable better comparability with the results of previous years once they have been revised retrospectively using the same method.

More detailed information on this revision can be found on the statistics portal (currently only available in French) under the following link: Household Budget Survey.

2.2 Impact on results

No impact on actual net household health care expenditure

3 HBS revision 2019: weighting model 20

3.1 Explanatory notes on the revision

The weighting model for calculating the estimated values of the household budget survey was revised with the 2019 survey. This new model uses important, additional variables that are available when using the SRPH (sample frame for person and household survey). Its main focus is on household composition and income data. The improved methodology uses additional auxiliary variables to correct for non-response, such as household composition and income. These auxiliary variables can be calculated retrospectively back to 2015.

At the same time, the results for the years 2015 to 2018 were also recalculated using the revised weighting model and published[1].

3.2 Impact on results

A comparison of the results with the old weighting model shows that in households with people of working age, single-person households and households in the lowest income quintile are weighted slightly more heavily. As a result, the estimated average household size, e.g. for 2018, drops from 2.16 to 2.14 people per household and the estimated average disposable income falls from CHF 7069 to CHF 6699 per month and household.

The observed impact of the revision on the income estimates for the entire population is much smaller for the more homogeneous sub-groups: In the lowest income category of couple households with children, the disposable income is estimated at CHF 4755 per month per household with the new weighting compared to CHF 4774 based on the old weighting.

Table 1: Revision of the weighting model, 2015-2018 (mean values in CHF, per household per month)

HBS	2015	2016	2017	2018

[1] See also press release of 23 November 2021: link

Old weighting				
Employee income	7566 (c)	7566 (b)	7304 (b)	7575 (b)
Pensions and social benefits	1818 (c)	1918 (c)	1962 (c)	1960 (c)
Gross income	9946 (b)	10 033 (b)	9917 (b)	10 114 (b)
Disposable income	6957 (b)	7124 (b)	6984 (b)	7069 (b)
New weighting				
Employee income	6750 (c)	6900 (c)	6758 (c)	6914 (c)
Pensions and social benefits	1981 (c)	2011 (c)	2050 (c)	2099 (c)
Gross income	9265 (b)	9422 (b)	9452 (b)	9560 (b)
Disposable income	6521 (b)	6695 (b)	6657 (b)	6699 (b)

Quality of estimators

a	Very good: coefficient of variation < 1%.
b	Good: coefficient of variation from ≥ 1% to < 2%.
c	Quite good: coefficient of variation from ≥ 2% to < 5%.

Source: HBS 2017, 2018, 2019, 2020

The impact of the revision is also more clearly visible in the absolute estimates of income, such as the level of disposable income, than in the relative estimates (such as the share of consumption expenditure in the household budget).

4 HBS revision 2008: change of name to the household budget survey (HBS)

4.1 Explanatory notes on the revision

To better describe the content of the survey, its name was adapted from "Income and Consumption Survey (ICS)" to the more commonly used international term "Household Budget Survey".

The results of the 2006 and 2007 surveys were also published under the new name[2] so that the revision of the content which took place two years earlier also has a clearer description.

4.2 Impact on results

None

[2] See also press release of 24 June 2008: link

5 HBS revision 2006: revision of the content and process optimisation

5.1 Explanatory notes on the revision

With the 2006 survey, the content, as well as conceptual and procedural components were revised.

The different components on the income and expenditure side were coordinated so that they could be analysed as an overall system (budget). This made it possible to calculate a savings amount as the cumulative addition and subtraction of income and expenditure. In addition, important aggregates on the income side were adapted to international standards, such as gross and disposable income, so as to use the same definitions as in the SILC survey (Survey on Income and Living Conditions).

Furthermore, the survey processes were also optimised, which considerably improved the quality. From 2006, for example, food was only recorded for half a month, reducing the number of events to be recorded by 25% without a noticeable reduction in the corresponding estimated values. At the same time, the observation period was extended to 6 months for major purchases (furniture, travel, etc.) and to 12 months for vehicles, which significantly improved the quality of the estimates concerned, for example by a factor of 3.5 in the case of vehicles.

5.2 Impact on results

This revision had little effect on the level of the estimates. However, the revised definition of gross income and the use of this aggregate as a reference value for the relative shares means that comparability with previous years is not always possible for the relative shares.

The new options for calculating transfers between households introduced with the 2006 revision make it possible to show specific aggregates (such as products gifted to other households), which was not possible with data prior to 2006.

6 ICS revision 2003: weighting model 03

6.1 Explanatory notes on the revision

Revision of the weighting model of the household budget survey:

With the publication of the 2003 ICS, a new weighting model was introduced. This model includes a correction step to ensure that the structure of the weighted sample matches that of the population as closely as possible. This significantly improves the quality of estimations of expenditure and income.

This new weighting method also allows data from several years to be grouped together to analyse population groups whose size – when one year only is considered – is too small to obtain reliable results.

At the same time, the results for the years 2000 to 2002 were also recalculated using the revised weighting model and published.

See also the press release of 30 May 2007, available only in French (link) and in German (link).

6.2 Impact on results

Analysing the impact of the revision shows that the average monthly income and expenditure total is smaller in comparison in the new weighting model 03. This can be explained by the fact that single-person households and young households, whose income is below average, are given greater weightings in the new model than in the old one.

With the revised weighting model, the distributions of the weighted sample of the income and consumption survey are closer to those of the external sources thanks to the new calibration stage, and the evolutions in these distributions are plausible.

7. Brief explanation of earlier revisions

7.1 Explanatory notes on the revisions

Revision ICS 2000: Continuous income and consumption survey (with around 3500 households responding per year) conducted from 1 January 2000.

ICS Revision 1998: The first income and consumption survey (ICS) was conducted, for the first time using telephone surveys of

households and providing telephone support for completion of paper questionnaires.
Sample size: 9295 responding households

CS Revision 1990: The first consumption survey (CS) was conducted. The survey took place in households and support in completing the paper questionnaire was provided on-site.
Sample size: 12,171 responding households (both subsamples combined).