# Norway 2000: Survey Information

## Summary table

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|---|---|
| **Generic information** | |
| Name of survey | Income Distribution Survey / Inntekts- og formuesundersøkelsen for husholdninger (IF) |
| Institution responsible | Statistics Norway |
| Frequency | Annual |
| Survey year / Wave | 2000 |
| Collection period | 2001 |
| Survey structure | Cross-sectional |
| Coverage | Resident population in private households |
| Geographic information | National level plus size of municipality |
| Files delivered | One file for individual level data, which also includes household level information |
| **Sample size** | |
| Households | 12,919 interviewed households |
| Individuals | 34,851 individuals |
| **Sampling** | |
| Sampling design | Stratified SRS (so-called net worth sample) |
| Sampling frame | Total Population Register |
| **Questionnaires** | Questionnaire (telephone interview) and administrative registers |
| **Standard classifications** | |
| Education | National education classification, correspondence with 1-digit ISCED |
| Occupation | No information |
| Industry | No information |
| **Income** | |
| Reference period | Calendar year 2000 |
| Unit of collection | Individual; most variables are then aggregated to the household level |
| Period of collection | Yearly income |
| Gross/net | Variables are recorded gross of taxes and contributions, the latter two being recorded separately |
| **Data editing / processing** | |
| Consistency checks | Extensive checks |
| Weighting | The weight inflates to total population |
| Imputation | Not needed since register data |

This document is based upon information from the website of Statistics Norway, page: **http://www.ssb.no/english/subjects/05/01/ifhus_en/** (English version) or **http://www.ssb.no/emner/05/01/ifhus/** (Norwegian version).

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## A. General characteristics

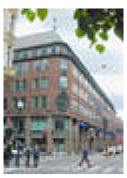
Official name of the survey/data source:
Income Distribution Survey (IDS) / *Inntekts- og formuesundersøkelsen for husholdninger (IF)*

Administrative Unit responsible for the survey:

Statistics Norway (SSB)

Division for Income and Wage Statistics (420).


**Oslo:**



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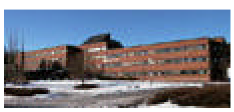
**Kongsvinger:**



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Purpose and use of the survey

The purpose of the statistics is to present income measurements as living standard indicators and data that measure the economic resources households have for saving and consumption. The statistics also present general income trends and income distribution among different types of households.

The first Income Distribution Survey was conducted in 1958, but has undergone several changes since then. It is not automatically possible to compare the results from the oldest surveys with the newer surveys in the area. In 1982 interviews were conducted for the first time to chart the composition of households, while in the past only information from the Central Population Register was used. The survey became annual beginning with the 1984 income year. In the 1990s the survey was greatly expanded thanks to access to more income-related administrative data. Beginning with the survey for the 1993 income year, it was possible to obtain all income data from the personal tax return in electronic form, while in the past the income data was obtained in the form of paper forms from the individual tax offices.

## B. Population, sampling size and sampling methods

Coverage

The population for the Income and Property Survey is all persons registered as living in Norway at 31 December during the survey year, with the exception of certain residents of institutions.

Sample size

The table below shows the development in the number of households included in the populations of the annual income distribution surveys for the years 1986,1991,1995,2000.

| Year | Number of households |
|---|---|
| 1986 | 4 975 |
| 1991 | 8 072 |
| 1995 | 10 127 |
| 2000 | 12 919 |

Sampling design

Until 1993 the population was basically obtained from the panel population of the Income Distribution Survey and the Survey of Consumer Expenditure totalling altogether around 3-4,000 households. Every four years the population was expanded with the Living Conditions Survey and the survey then included around 5-6,000 households. From 1994 and ever since the population has consisted of the panel population of the Income Distribution Survey, the Income and Property Survey for Self-Employed Persons and the revolving subject Living Conditions Surveys. This has made it possible to expand the survey to cover between 10-15,000 households.

## C. Data collection and acquisition

Data collection period

Data were collected during 2001.

Survey instruments

Data were collected mostly from computer-aided telephone interviews (CATI) with the selected persons and their household. The interview was only about the household composition.

In case of non-response on household composition during interviews, information about family composition is taken from Statistics Norway's Population Database (married couples with and without children/cohabitants with joint children) and partnerships (joint property) from the tax return statistics.

Survey data were also collected from administrative data registers and from tax return forms. The administrative data registers used contain information about, e.g., income, taxes and transfer payments for each income year.

The main source of income and property data is the personal tax return obtained from the Directorate of Taxes. In addition, this data is linked to income and biological data from:

- The Central Population Register (marital status etc.)
- Tax statistics for personal taxpayers (taxes, net income etc.)
- Wage sum statistics (unemployment and various tax-free transfers)
- National Insurance Administration (basic and supplementary benefit, cash benefit etc.)
- Ministry of Social Affairs (social assistance)

- Statistics Norway's register of the population's highest education (highest completed education)
- State Education Loan Fund (loans, stipends, debts)
- Norwegian State Housing Bank (housing allowance)

## D. Definition of the survey units

Data were collected both at the person and household level.

Reference person

A housekeeping unit can contain one or several family units. If there is only one family unit, the reference person is the person who has the highest earnings including pensions; if there is more than one family unit the reference person of the housekeeping unit is the reference person from the "dominated" family unit (family unit with children or cohabiting).

## E. Contents

The survey mainly collects statistics on income and property. Besides this, there is some demographic information.

## F. Quality of data

Non-response

In case of non-response on household composition during interviews, information about family composition is taken from Statistics Norway's Population Database (married couples with and without children/cohabitants with joint children) and partnerships (joint property) from the tax return statistics. Apart from the household composition, the survey is therefore not affected by the non-response.

Weighting

The population of the Income Distribution Survey is weighted with the help of a calibration program. This method of estimation permits the population to show the same aggregates familiar from the register statistics (for the population) for selected variables.

This applies to the different personal incomes and net wealth. The weight sums up to the population size.

Collection and processing errors

The most important primary data are obtained from the tax returns. They can contain errors made by the individual taxpayer who fills out the forms. A number of the errors are discovered and corrected by the tax offices. The control system used uncovers errors when there are logical breaks in the forms.

Errors that do not have a practical bearing on the tax return are often not corrected by the tax offices, causing discrepancies in the material. In particular small amounts under the tax-free limit are frequently left standing even though they are not filled out correctly.

A number of data collection and processing errors are unavoidable. These include coding errors, revision errors, data processing errors, etc. Comprehensive efforts have been made to minimize these errors, and we regard these types of errors to be relatively insignificant.

Frame errors

In addition errors can occur when persons who have not answered the household interview actually have a different household composition than the one found in the register.

Spatial comparability and comparability over time

The Income Distribution Survey has gone through several significant changes up through the years. This is due in part to changes in the analysis unit (1982) and in part to changes in the income concept as a result of changes in the tax system and access to new income components from registers.

A more detailed description of changes that have taken place in the income concept since 1986 is given in NOS C581 Income and Property Statistics for Households 1986-1996.

Coherence

The data basis is virtually identical with register-based income statistics. This statistic is a complete enumeration and can therefore provide more detailed statistics for small groups. The register-based statistic can, however, not give figures for the households. The data are identical with the basis of the LOTTE tax model for a particular year.

Control and revision

Consistency controls are undertaken by comparing information from different sources (tax return statistics and tax statistics). Further consistency controls are done for self-employed persons by comparing information from tax returns with trading statements.

## G. Uses of the survey

The main users are the Ministry of Finance, Ministry of Health and Social Affairs, Ministry of Children and Family Affairs, Ministry of Labour and Government Administration, and research institutes in the areas of household economics, tax research and living conditions in general.

The tax model LOTTE is updated annually with data from the Income and Property Survey for households.

Publications

NOS C581 Income and Property Statistics for Households 1986-1996

Forskjeller i levekår - bidrag til stortingsmelding

Inntekt, skatt, overføringer 1999 (SA 28)

Eldre i Norge (SA 32)

Social Survey 2000 (SA 35)

J. Epland: Endringer i fordelingen av husholdningsinntekt: 1986-1996 (Rapporter 98/17)

J. Epland (1998) Inntekt etter skatt. Revisjon av inntektsregnskapet i inntekts- og formuesundersøkelsen for husholdninger. Notater 98/43

V. Pedersen (1998) Income Distribution Survey 1995. Documentation. Notes 98/11.

Poverty and income distribution

The decile ratios as reported from the original survey are the following:

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|---|---|
| 2000 | 3,7 | 5,6 | 6,7 | 7,6 | 8,5 | 9,4 | 10,3 | 11,4 | 13,1 | 23,8 |