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*Harmonization of Cross-National Studies of
Aging to the Health and Retirement Study
User Guide: Household Expenditure*

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**HARMONIZATION OF CROSS-NATIONAL STUDIES OF AGING TO THE HEALTH AND
RETIREMENT STUDY**

USER GUIDE

Household Expenditure

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INTRODUCTION

The Health and Retirement Study (HRS) has achieved remarkable scientific success, as demonstrated by an impressive number of users, research studies and publications. Its success has generated substantial interest in collecting similar data around the world in view of global population aging. The result has been a number of surveys designed to be comparable with the HRS: the English Longitudinal Study of Ageing (ELSA), the Survey of Health, Ageing, and Retirement in Europe (SHARE), the Korean Longitudinal Study of Aging (KLoSA), the Longitudinal Aging Study in India (LASI), the China Health and Retirement Longitudinal Study (CHARLS), the Japanese Study on Aging and Retirement (JSTAR), The Irish Longitudinal Study on Ageing (TILDA), the Indonesia Family Life Survey (IFLS), and the Mexican Health and Ageing Study (MHAS).

Since these surveys have harmonization as a goal, they provide remarkable opportunities for cross country studies. The value of comparative analyses, especially regarding lessons resulting from policies adopted in different contexts, is widely recognized. Yet, there is only a limited number of empirical studies exploiting such opportunities. This is partly due to the difficulties associated with using multiple surveys and learning the policies and institutions of different countries.

Identifying comparable questions across surveys is the first step toward cross-country analyses. The GATEWAY TO GLOBAL AGING DATA web site (<https://g2aging.org/>) provides users a digital library of questions for all the aforementioned surveys. Its search engines enable users to examine cross-country concordance for each survey question. Using them, researchers can identify all questions related to particular key words or within a domain or a sub- domain.

Nevertheless, comparing these questions and evaluating comparability across surveys is still a labor-intensive process. Understanding all the idiosyncratic details in each survey takes still more effort. To reduce time and effort needed for cross-country research, we have prepared a series of domain-specific user guides. These guides are designed to provide researchers with documentation about the concepts, measures, and questions of particular domains in all HRS-family surveys. For each domain, we reviewed all relevant questions across all surveys. These guides expand upon the information found in codebooks, questionnaires, and data descriptions. They also evaluate comparability across surveys and indicate harmonized measures that can be exploited for cross-country analyses. We hope these guides accelerate scientific advances, by helping researchers save time and better understand what can be studied in HRS-family surveys.

This household-expenditure user guide focuses on expenditure by the household on food, automobile, education, medical, clothing, durable goods and other household items.

EXECUTIVE SUMMARY AND OVERVIEW

This guide summarizes data on household expenditure from Health and Retirement Study (HRS) and its sister surveys. Specifically, we consider the Health and Retirement Study Consumption and Activities Mail Survey (HRS/CAMS, 2001 wave 1 ~ 2013 wave 7), the Mexican Health and Aging Survey (MHAS, 2001 wave 1 ~ 2003 wave 2), the English Longitudinal Study of Ageing (ELSA, 2002 wave 1~ 2010 wave 5), the Survey of Health, Ageing, and Retirement in Europe (SHARE, 2005 wave 1 and 2006 wave 2), the Korean Longitudinal Study of Aging (KLoSA, 2008 wave 2~ 2012 wave 4), the Indonesia Family Life Survey (IFLS, 2007 wave 4), the Japanese Study of Aging and Retirement (JSTAR, 2007 wave 1 ~ 2011 wave 3), the Irish Longitudinal Study on Aging (TILDA), and the China Health and Retirement Longitudinal Survey (CHARLS, 2010 wave 1 and 2011 wave 2).

TILDA does not ask any questions related to household expenditure. We mention TILDA only for the sake of maintaining the same list of surveys as in other user guides. All other surveys collect some information on household expenditure, but vary in the spectrum and details of questions asked. We group the household expenditure into nine categories: food, automobile, education, medical, clothing, durable goods, other household expenditure (like rent, utilities, travel, etc), and total expenditure.

We assess similarities and differences across the aforementioned surveys.

- All surveys except MHAS and TILDA elicit household food expenditure.
- All surveys except IFLS ask separately for expenditure on food consumed at home and eaten out. Only CHARLS and IFLS elicit expenditure on alcohol and tobacco.
- CHARLS, SHARE, and IFLS ask about the market value of home produced food consumed by the household.
- Questions about automobile/vehicle expenditure are asked by HRS, CHARLS and JSTAR. IFLS ask for total expenditure on durable goods including automobile. Hence, expenditure on automobile cannot be separately inferred.
- Education expenditure is elicited by KLoSA, CHARLS and IFLS.
- Medical expenditure is asked in HRS, KLoSA, CHARLS and IFLS.
- HRS, KLoSA, CHARLS and IFLS ask questions about clothing expenditure. JSTAR only asks whether consumption on clothing has changed compared to the previous year.

- All surveys, except MHAS and TILDA, ask about other household expenditures.
- HRS, JSTAR and MHAS ask respondent to report an aggregate level total household expenditure.

There exist noticeable variations in the measurement and/or structure of the questions:

- The frequency of expenditure is asked based on various time periods (weekly, monthly or yearly). For example, HRS asks the respondents for their food expenditure over a week, month or last twelve months. KLoSA, JSTAR and SHARE ask for monthly food expenditure in the past year, whereas CHARLS, IFLS, and ELSA ask for expenditure in the last week.
- The contents of the questions in each section may be different. For example, in the education expenditure module, KLoSA asks both private and public education expenditure while IFLS and CHARLS asks only for total education expenditure. We also observe different contents asked in the medical expenditure module, clothing expenditure module, and total household expenditure. Detailed information is provided in the main text.

As far as comparisons across surveys are concerned:

- CHARLS, SHARE, and IFLS ask about the market value of home produced food consumed by the household. This information allows to construct a measure of food consumption as opposed to just food expenditure.
- Since KLoSA and CHARLS only ask for total medical expenditure, their measures are not directly comparable to those in HRS and IFLS, where respondents report about medical expenditure on separate items.
- Clothing expenditure questions vary substantially across HRS, KLoSA, CHARLS and IFLS. Therefore, a comparable measure of clothing expenditure may be difficult to construct.
- While HRS, IFLS, CHARLS and KLoSA elicit other household expenses in great detail, SHARE, ELSA and JSTAR all contain very little information on other household expenses.
- HRS, JSTAR and MHAS ask respondent to report the aggregate, total household expenditure in the past year. When asking about this aggregate measure, surveys provide different instructions with regard to the specific items that should be excluded. Specifically, HRS instructs to exclude any money saved or invested. JSTAR instructs to exclude expenditure on rent,

housing loan payments, other housing costs and purchase of durable goods. MHAS instructs to exclude the value of goods produced for home consumption.

1. INVENTORY OF EXPENDITURE MEASURES

This guide provides an overview of expenditure measures such as food, clothing, education and medical expenditure, as well as vehicles, other durable goods and housing (rent, utilities, living costs) expenditure across several aging surveys. Specifically, it covers the Health and Retirement Study Consumption and Activities Mail Survey (HRS/CAMS, 2001 wave 1 ~ 2013 wave 7), Mexican Health and Aging Survey (MHAS, 2001 wave 1 ~ 2003 wave 2), English Longitudinal Study of Ageing (ELSA, 2002 wave 1~ 2010 wave 5), Survey of Health, Ageing, and Retirement in Europe (SHARE, 2005 wave 1 and 2006 wave 2), Korean Longitudinal Study of Aging (KLoSA, 2008 wave 2~ 2012 wave 4), Indonesia Family Life Survey (IFLS, 2007 wave 4), Japanese Study of Aging and Retirement (JSTAR, 2007 wave 1 ~ 2011 wave 3), The Irish Longitudinal Study on Aging (TILDA), and China Health and Retirement Longitudinal Survey (CHARLS, 2010 wave 1 and 2011 wave 2).

In the first chapter, we give an overview of the questions asked by each survey to elicit household expenditure. In the second chapter, we examine how the questions are constructed and the specific concepts they intend to measure. Based on this analysis, we indicate the extent to which comparable expenditure measures can be obtained across surveys. In the last chapter, we provide the complete list of expenditure questions for each survey.

We only review questions asked within expenditure/consumption modules. For example, we do not discuss items like cigarette and alcohol consumption if they are elicited within the health section of the questionnaire.

1.1 HRS/CAMS

The HRS/CAMS questionnaire asks respondents to report the amount spent on a wide range of expenditure categories. Respondents are encouraged to provide their best estimate of the expenditure amount. For big-ticket items, respondents are first asked whether they purchased the item and then about some characteristics, including the purchase price.

1.1.1 Food Expenditure

HRS elicits food and beverage expenditure in the past twelve months. Respondents are asked separately about items bought in grocery or other stores and items consumed in restaurant, diners, cafes, etc. Respondents can choose to report their food and beverage expenditure on a weekly, monthly or yearly basis. The survey does not ask about the value of home produced goods that are consumed by the household.

1.1.2 Automobile Expenditure

HRS asks whether the household purchased or leased a vehicle in the past twelve months. A follow-up questions elicits the make, model, year and price of the purchased vehicle.

1.1.3 Education Expenditure

N.A.

1.1.4 Medical Expenditure

HRS asks about medical expenditure in the consumption section. Medical expenditure includes the cost of health care services, prescription and non-prescription medicines, hospital care, doctor services, nursing home care, lab tests, eye, dental, and medical supplies. Respondents can report the amount spent on a monthly or yearly basis.

1.1.5 Clothing Expenditure

HRS asks about total expenditure on clothing and apparel, including shoes, accessories, and jewelry. Respondents can report the amount spent on a monthly or yearly basis.

1.1.6 (Other) Household Expenditure

HRS asks the respondents about other household expenditures besides food, medical and clothing. Specifically, the survey asks separately for expenditure on renter's insurance, property taxes, vehicle insurance, trips and vacations, home repairs, rent, electricity, water, heating, housekeeping supplies, entertainment, gasoline etc. The respondents are asked to report either monthly or yearly amounts.

1.1.7 Durable Goods Expenditure (excluding automobiles)

HRS asks whether the household purchased certain durable goods in the past twelve months and, if yes, the corresponding purchase price.

1.1.8 Total Expenditure

HRS asks about household's total spending in the last year. Respondents are explicitly instructed to exclude any money saved or invested.

1.2 Mexico – Mexican Health and Aging Survey (MHAS)

MHAS asks its respondents to report their total monthly household expenditure. The survey does not elicit separately food, medical, clothing, automobile, or durable goods expenditure.

1.2.1 Food Expenditure

N.A.

1.2.2 Automobile Expenditure

N.A.

1.2.3 Education Expenditure

N.A.

1.2.4 Medical Expenditure

N.A.

1.2.5 Clothing Expenditure

N.A.

1.2.6 (Other) Household Expenditure

N.A.

1.2.7 Durable Goods Expenditure (excluding automobiles)

N.A.

1.2.8 Total Expenditure

MHAS asks respondents to report total household expenditure in a month.

1.3 England – English Longitudinal Study of Aging (ELSA)

In the module ‘household expenditure,’ ELSA elicits food expenditure and household rent. ELSA does not ask for expenditure on automobile, education, medical, clothing, durable goods or for total expenditure.

1.3.1 Food Expenditure

ELSA elicits food and grocery spending and, separately, expenditure for food consumed out of home in a week. Respondents are explicitly asked to exclude alcohol spending.

1.3.2 Automobile Expenditure

N.A.

1.3.3 Education Expenditure

N.A.

1.3.4 Medical Expenditure

N.A.

1.3.5 Clothing Expenditure

N.A.

1.3.6 (Other) Household Expenditure

ELSA asks about the rent payment per week.

1.3.7 Durable Goods Expenditure (excluding automobiles)

N.A.

1.3.8 Total Expenditure

N.A.

1.4 Europe – Survey of Health, Ageing, and Retirement in Europe (SHARE)

SHARE elicits food expenditure, including the value of home-produced food. It does not ask for expenditure on automobile, education, medical, clothing, durable goods or for total expenditure.

1.4.1 Food Expenditure

Respondents are asked to report expenditure in a typical month on food eaten at home and eaten out, separately. Another questionnaire item elicits the value of any home-produced food.

1.4.2 Automobile Expenditure

N.A.

1.4.3 Education Expenditure

N.A.

1.4.4 Medical Expenditure

N.A.

1.4.5 Clothing Expenditure

N.A.

1.4.6 (Other) Household Expenditure

Respondents are asked to report the expenditure on telephone calls and charges in a typical month in the last twelve months.

1.4.7 Durable Goods Expenditure (excluding automobiles)

N.A.

1.4.8 Total Expenditure

N.A.

1.5 South Korea – Korean Longitudinal Study of Aging (KLoSA)

KLoSA introduced a separate expenditure module starting from wave 2. In this user guide, we do not consider any expenditure measure elicited by other sections of KLoSA questionnaire in wave 1. KLoSA questionnaire elicits monthly expenditure on food, education, medical, clothing, rent and utilities. The survey does not ask for durable goods expenditure or total expenditure. For each category, unfolding brackets are adopted to reduce item nonresponse.

1.5.1 Food Expenditure

Separate questions elicit household average monthly expenditure on food and dining out.

1.5.2 Automobile Expenditure

N.A.

1.5.3 Education Expenditure

Separate questions elicit household average monthly expenditure on public and private education. This includes tuition, textbooks, materials, etc.

1.5.4 Medical Expenditure

Respondents are asked to report household average monthly medical expenditure, excluding health insurance premium.

1.5.5 Clothing Expenditure

KLoSA elicits household's average monthly expenditure on clothing.

1.5.6 (Other) Household Expenditure

KLoSA asks about other household expenses in the last calendar year. This excludes food consumption, medical, and clothing expenditure. The respondents are also asked to report monthly rent for housing as well as utilities including electricity, water and gas.

1.5.7 Durable Goods Expenditure (excluding automobiles)

N.A.

1.5.8 Total Expenditure

N.A.

1.6 Indonesia – Indonesia Family Life Survey (IFLS)

The IFLS questionnaire asks respondents to report the amount spent on a wide range of expenditure categories. The survey elicits food expenditure in great detail, it does not ask for expenditure on automobile, but elicits expenditure on education, medical, clothing, durable goods, and other household living costs.

1.6.1 Food Expenditure

The IFLS questionnaire includes a variety of food consumption categories. Respondents are asked to report the amount spent on different types of food (e.g., rice, corn, flour, cassava, potatoes, vegetables, beans, fruits, noodles, cookies, meat, eggs, milk, salt, butter, cooking oil, drinking water and soft drinks). In addition, IFLS elicits spending on alcohol and cigarettes. .

1.6.2 Automobile Expenditure

IFLS asks for total expenditure on house, cars, television sets, handphones, beds livestock and the like. It is therefore not possible to separately infer automobile expenditure.

1.6.3 Education Expenditure

Respondents are asked to report total expenditure on education including expenses for tuition, PTA contribution, school committee, laboratory, registration, exams, etc. A separate question elicits total expenditure on schooling needs, including school uniforms and supplies. Another two questions ask about transportation and pocket money and spending on boarding/room rent. Amounts are separately elicited for children/family member inside and outside the household.

1.6.4 Medical Expenditure

IFLS elicits total medical spending, including hospitalization costs, clinic charges, physician's fee, traditional healer's fee, medicines and the like.

1.6.5 Clothing Expenditure

IFLS elicits total expenditure on clothing, footwear and accessories for children and adults in the household.

1.6.6 (Other) Household Expenditure

IFLS elicits comprehensive information about other housing and living expenditure. Separate questions ask about expenditure on electricity, water, fuel, telephone, personal toiletries, household items, recreation and entertainment, transportation, sweepstakes and the like, Arisan, value of non-food items given to others/other parties outside the household on a regular basis. Additional questions separately elicit household expenditure on supplies and furniture, ritual ceremonies, taxes and the value of non-food items given to others/other parties outside the household on an irregular basis.

1.6.7 Durable Goods Expenditure (excluding automobiles)

IFLS asks for total expenditure on cars, house, television sets, handphones, beds livestock and the like.

1.6.8 Total Expenditure

N.A.

1.7 Japan – Japanese Study of Aging and Retirement (JSTAR)

The JSTAR questionnaire elicits monthly expenditure on food (both in home and separately for eating out), automobile, durable goods, and other household living costs. The survey also asks for changes in expenditure compared to last year. The survey does not elicit education, medical, or clothing expenditure.

1.7.1 Food Expenditure

JSTAR elicits expenditure on food in a typical month. The survey makes use of unfolding brackets to minimize non-response. A separate question asks about spending on eating out in a typical month. Respondents also report how much expenditure on these items has changed compared to previous years.

1.7.2 Automobile Expenditure

JSTAR elicits the frequency and price of automobile purchases. The questions explicitly ask respondents to distinguish between the purchase of a new vehicle and a used one.

1.7.3 Education Expenditure

N.A.

1.7.4 Medical Expenditure

N.A.

1.7.5 Clothing Expenditure

N.A.

1.7.6 (Other) Household Expenditure

Respondents are asked to report the change in living expenses compared to previous years. The survey does not elicit the amount spent for rent, utilities and living costs.

1.7.7 Durable Goods Expenditure (excluding automobiles)

JSTAR elicits total expenditure on electrical items or other durable goods (television, video/DVD player, computer, refrigerator, microwave oven, washing machine, dishwasher, etc) in the past year. In addition, respondents are asked to report how much expenditure on these items has changed compared to previous years.

1.7.8 Total Expenditure

JSTAR elicits total household expenditure in a typical month, excluding rent, housing loan payments or other housing costs, and purchases of durable goods (television, refrigerator, etc).

1.8 The Irish Longitudinal study on Ageing (TILDA)

TILDA does not have a consumption section. In this document, we mention TILDA only for the sake of maintaining the same list of surveys as in other user guides.

1.8.1 Food Expenditure

N.A.

1.8.2 Automobile Expenditure

N.A.

1.8.3 Education Expenditure

N.A.

1.8.4 Medical Expenditure

N.A.

1.8.5 Clothing Expenditure

N.A.

1.8.6 (Other) Household Expenditure

N.A.

1.8.7 Durable Goods Expenditure (excluding automobiles)

N.A.

1.8.8 Total Expenditure

N.A.

1.9 China - China Health and Retirement Longitudinal Survey (CHARLS)

The CHARLS questionnaire asks respondents to report the amount spent on food, alcohol and tobacco, as well as the value of home-produced goods. The survey also asks for household expenditure on automobile, education, medical, clothing, durable goods, and other household living costs.

1.9.1 Food Expenditure

The CHARLS questionnaire elicits the total value of food expenditure. It separately asks for expenditure on eating out. In addition, the survey asks the market value of foods that household members grew themselves. Respondents are also asked about the expenditure on alcohol and tobacco.

1.9.2 Automobile Expenditure

Respondents are asked to report expenditure on automobiles in the last year.

1.9.3 Education Expenditure

CHARLS elicits the value of household expenditure on education and training in the last year.

1.9.4 Medical Expenditure

Respondents are asked to report household total spending on medical expenditure in the last year. The question does not explicitly instruct to exclude health insurance premium from this amount.

1.9.5 Clothing Expenditure

CHARLS elicits the value of household expenditure on clothing and bedding.

1.9.6 (Other) Household Expenditure

CHARLS elicits household expenditure on a wide range of items, including communication fees, utilities, fuels, transportation etc..

1.9.7 Durable Goods Expenditure (excluding automobiles)

Respondents are asked to report household spending on various durable goods such as refrigerator, washing machine, TV etc.

1.9.8 Total Expenditure

N.A.

2. METHODOLOGICAL ISSUES ACROSS SURVEYS

In this section, we highlight similarities and differences of elicited expenditure measures across surveys. We focus on salient features of expenditure questions within each survey, such as, the reference unit and period, and the concept being measured. This information is key to assess whether, for each specific measure, cross-study comparisons are possible or hampered by methodological differences.

2.1 Measures of food expenditure

All surveys except MHAS and TILDA elicit household food expenditure.

2.1.1 Respondent

In ELSA, SHARE, KLoSA and CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In IFLS, expenditure questions are answered by female respondents, either the spouse of the household head or another person most knowledgeable about household affairs. In JSTAR the only sample participant within the household answers these questions.

2.1.2 Unit of observation

All surveys elicit food expenditure at the household level. A household is defined as individuals living in the same dwelling.

2.1.3 Reference period

HRS asks the respondents for their food expenditure over a week, month or last twelve months. KLoSA, JSTAR and SHARE ask for monthly food expenditure in the past year, whereas CHARLS and IFLS ask for expenditure in the last week. ELSA asks for weekly food expenditure.

2.1.4 Food expenditure categories

All surveys except IFLS ask separately for expenditure on food consumed at home and eaten out. Only CHARLS and IFLS elicit expenditure on alcohol and tobacco. CHARLS, SHARE and IFLS ask about the market value of home produced food consumed by the household. This information allows to construct a measure of food consumption as opposed to just food expenditure. JSTAR is the only study eliciting the change in food expenditure in the past year compared to previous years.

Comparable measure for food expenditure

After adjusting difference due to a different reference period, the measures for total food expenditure and eating out expenditure are comparable across all surveys. Expenditure on alcohol and tobacco is also comparable across HRS, CHARLS and IFLS.

Table 1. Summary of Questions about Food Expenditure

	HRS	MHAS	ELSA	SHARE	KLoSA (Wave 2~4)	IFLS	JSTAR	TILDA	CHARLS
Unit of observation	Household	Household	Household	Household	Household	Household	Household	Household	Household
Reference period	Weekly or monthly or last twelve months	NA	YES. Weekly	YES. Monthly level in the last 12 months	YES. Monthly level in the last year	YES. Past week.	YES A typical month in the last year	NA	YES. Past week
Categories/Measure Type:									
Asked about “eating out” separately?	YES	NA	YES.	YES.	YES.	NA	YES	NA	YES.
Asked about “Alcohol/Cigarettes” separately?	YES	NA	NA	NA	NA	YES	NA	NA	YES
Asked about “market value of home produced goods consumption”?	NA	NA	NA	YES	NA	YES	NA	NA	YES
Asked about change in food expenditure compared to previous year?	NA	NA	NA	NA	NA	NA	YES	NA	NA
Cross country comparison									
	C	NA	C	D	C	D	C	NA	D

C: Comparable, D: Different, NA: Not Asked

2.2 Measures of automobile expenditure

Questions about automobile/vehicle expenditure are asked by HRS, CHARLS and JSTAR. IFLS ask for total expenditure on durable goods. Hence, expenditure on automobile cannot be separately inferred.

2.2.1 Respondent

In CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In JSTAR the only sample participant within the household answers these questions.

2.2.2 Unit of observation

HRS, CHARLS and JSTAR elicit automobile expenditure at the household level. A household is defined as individuals living in the same dwelling.

2.2.3 Reference period

HRS, CHARLS and JSTAR elicit the amount spent by the household on automobile purchases in the last twelve months.

2.2.4 Automobile expenditure categories

HRS, CHARLS and JSTAR ask for expenditure on automobile. In addition, JSTAR asks the frequency of automobile purchases and whether the purchase involved a new or a used car.

Comparable measure of automobile expenditure

Reported amounts are comparable across HRS, CHARLS and JSTAR.

Table 2. Summary of Questions about Automobile Expenditure

	HRS	JSTAR	CHARLS
Unit of observation	Household	Household	Household
Reference period	Last twelve months	Last twelve months	Last twelve months
Categories/Measure Type:			
Amount	YES	YES	YES
Frequency	NA	YES	NA
Asked whether it is a New or Used vehicle	YES	YES	NA
Cross country comparison	C	C	C

C: Comparable, D: Different, NA: Not Asked

2.3 Measures of education expenditure

Education expenditure is elicited by KLoSA, CHARLS and IFLS. The total education expenditure is comparable across the three surveys. KLoSA asks separately for household's average monthly expenditure on public and private education. IFLS asks for household expenses for children/family members living inside as well as outside the household. CHARLS asks for household's total education expenses.

2.3.1 Respondent

In KLoSA and CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In IFLS, expenditure questions are answered by female respondents, either the spouse of the household head or another person most knowledgeable about household affairs.

2.3.2 Unit of observation

KLoSA, CHARLS and IFLS elicit education expenditure at the household level. A household is defined as individuals living in the same dwelling but IFLS asks for expenditure related to children/family inside and outside the household. These two types of expenditures are elicited separately.

2.3.3 Reference time

KLoSA asks for average monthly education expenditure in the last year. CHARLS and IFLS ask for education expenditure during the past year.

2.3.4 Education expenditure categories

KLoSA asks for expenditure on tuition, textbooks and materials. CHARLS asks for expenditure on education and training. IFLS elicits response on total educational expenses, it then further asks separately for expenses related to schooling needs (like school uniforms etc), transportation and pocket money, and boarding expenses.

Comparable measure of education expenditure

Each survey includes different types of education expenditure. Only IFLS has separate questions about schooling needs, transportation and cost of boarding/room. IFLS also asks for expenditures within and outside the household. All this makes the education expenditure not comparable across surveys

Table 3. Summary of Questions about Education Expenditure

	KLoSA	IFLS	CHARLS
Unit of observation	Household	Household (expenditure for family, inside and outside the household)	Household
Reference period	Monthly level in the last year	Past year	Past year
Categories/Measure Type:			
Including	Tuition, textbooks, materials (public/private sector)	Tuition, PTA contribution, laboratory, registration, exams, other contribution like student associations, uniforms, school supplies, transportation, boarding/room rent	Tuition, training fees
Separate question about school supplies (like uniforms), boarding	NA	YES	NA
Cross Country comparison			
	D	D	D

C: Comparable, D: Different NA: Not Asked

2.4 Measures of medical expenditure

HRS, KLoSA, CHARLS and IFLS ask questions about medical expenditure.

2.4.1 Respondent

In KLoSA and CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In IFLS, expenditure questions are answered by female respondents, either the spouse of the household head or another person most knowledgeable about household affairs.

2.4.2 Unit of observation

HRS, KLoSA, CHARLS and IFLS elicit medical expenditure at the household level. A household is defined as individuals living in the same dwelling.

2.4.3 Reference period

HRS asks about medical expenditure per month or in last twelve months. KLoSA asks about monthly medical expenditure in last year. IFLS and CHARLS ask for medical expenditure in last year.

2.4.4 Medical expenditure categories

HRS asks for expenditure on health care services, prescription, non prescription medicines, hospital care, doctor services, nursing home care, lab tests, eye, dental, medical supplies. KLoSA asks for total medical expenditure, excluding health insurance premia. CHARLS asks for total medical expenditure. IFLS asks for total expenditure on hospitalization, clinic charges, physician's fee, traditional healer's fee and medicines.

Comparable measure of medical expenditure

Comparability of medical expenditure across surveys depends on the context. The categories included for medical expenditure in each survey are different. Also, whether or not insurance-related expenditure are included and have an effect on comparability.

Table 4. Summary of Questions about Medical Expenditure

	HRS	KLoSA	IFLS	CHARLS
Unit of observation	Household	Household	Household	Household
Reference period	Monthly or in the last twelve months	Monthly level in the last year	Past year	Past year
Categories/Measure Type:				
Expenditure type	Health care services, prescription, non prescription medicines, hospital care, doctor services, nursing home care, lab tests, eye, dental, medical supplies	Excluding health insurance premiums	Hospitalization, clinic charges, physician's fee, traditional healer's fee, medicines	Not specified the exact criteria (we are not sure whether medical expenditure includes health insurance)
Health Insurance asked separately	YES	NA	NA	NA
Medications asked separately	YES	NA	NA	NA
Health Care Services asked separately	YES	NA	NA	NA
Medical Supplies asked separately	YES	NA	NA	NA
Cross Country Comparison	C1	C1	C1	C1

C: Comparable, C1: Comparable with differences D: Different, NA: Not Asked

2.5 Measures of Clothing Expenditure

HRS, KLoSA, CHARLS and IFLS ask questions about clothing expenditure. JSTAR only asks whether consumption on clothing has changed compared to the previous year.

2.5.1 Respondent

In KLoSA and CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In the HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In IFLS, expenditure questions are answered by females respondents, either the spouse of the household head or another person most knowledgeable about household affairs.

2.5.2 Unit of observation

HRS, KLoSA, CHARLS and IFLS elicit clothing expenditure at the household level. A household is defined as individuals living in the same dwelling.

2.5.3 Reference period

HRS asks about clothing expenditure per month or in last twelve months. KLoSA asks about monthly clothing expenditure. IFLS and CHARLS ask about clothing expenditure in the last year.

2.5.4 Clothing expenditure categories

HRS asks for expenditure on clothing, footwear, outerwear, accessories, jewelry. KLoSA asks for expenditure on clothes and shoes. CHARLS asks for expenditure on clothing and bedding. The IFLS asks for expenditure on clothing, shoes, hats, children clothing etc.

Comparable measure of clothing expenditure

HRS and IFLS have more comprehensive measures of clothing expenditure, which can be considered roughly comparable overall. CHARLS and KLoSA elicit less comprehensive measures instead.

Table 5. Summary of Questions about Clothing Expenditure

	HRS	KLoSA	IFLS	CHARLS
Unit of observation	Household	Household	Household	Household
Reference period	Monthly or in last twelve months	Monthly level in the last year	Past year	Last year
Categories/Measure Type:				
Including	Clothing, footwear, outerwear, accessories, jewelry	Clothes, shoes	Shoes, hats, shirts, pants, children clothing and the like	Clothing and bedding
Cross Country Comparison	C	C1	C	C1

C: Comparable, C1: Comparable with differences, D: Different, NA: Not Asked

2.6 Measures of (Other) household expenditure

All surveys (except MHAS and TILDA) ask about other household expenditures.

2.6.1 Respondent

In ELSA, SHARE, KLoSA and CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In IFLS, expenditure questions are answered by females respondents, either the spouse of the household head or another person most knowledgeable about household affairs. In JSTAR the only sample participant within the household answers these questions.

2.6.2 Unit of observation

All surveys elicit (other) household expenditure at the household level. A household is defined as individuals living in the same dwelling.

2.6.3 Reference period

All surveys ask for (other) household expenditure in the last year

2.6.4 (Other) Household expenditure categories

Overall HRS, IFLS and CHARLS help us understand in detail all the (other) expenses incurred by the household. KLoSA gives the information separated into broad fields. SHARE, ELSA and JSTAR have very little information on (other) expenses. Specific items that were asked are presented in the table 6.

Comparable measure of (Other) household expenditure

Items asked in the surveys are different. Details of this is provided in the table below. This makes the surveys comparable with differences.

Table 6. Summary of Questions about (Other) Household Expenditure

	HRS	MHAS	ELSA	SHARE	KLoSA	IFLS	JSTAR	TILDA	CHARLS
Unit of observation	Household	Household	Household	Household	Household	Household	Household	Household	Household
Reference period	Last year	Last year	Last year	Last year	Last year	Last year	Last year	Last year	Last year
Categories/Measure Type:									
Living costs	YES	NA	NA	NA	YES	NA	NA	NA	NA
Rent, property management	YES	NA	YES	NA	YES	NA	NA	NA	YES
Utilities: Power and water, gas, heating	YES	NA	NA	NA	YES	YES	YES	NA	YES
Communication (post, internet, telephone)	YES	NA	NA	YES	NA	YES	NA	NA	YES
Transportation	YES	NA	NA	NA	NA	YES	NA	NA	YES
Entertainment	YES	NA	NA	NA	NA	YES	NA	NA	YES
Traveling	YES	NA	NA	NA	NA	NA	NA	NA	YES
Household supplies: tables, beauty, personal toiletries, laundry	YES	NA	NA	NA	NA	YES	NA	NA	YES
Taxes	YES	NA	NA	NA	NA	YES	NA	NA	YES
Donation	YES	NA	NA	NA	NA	NA	NA	NA	YES
Servants' wages	YES	NA	NA	NA	NA	YES	NA	NA	YES
Community participation	NA	NA	NA	NA	NA	YES	NA	NA	NA
Ritual ceremonies, wedding, charities	YES	NA	NA	NA	NA	YES	NA	NA	NA
Asked about "changing living expenditure compared to previous year?"	NA	NA	NA	NA	NA	NA	YES	NA	NA
Cross country comparison	C1	NA	C1	C1	C1	C1	C1	NA	C1

C: Comparable, C1: Comparable with differences, NA: Not Aske

2.7 Measures durable goods expenditure (excluding automobiles)

HRS, CHARLS, JSTAR and IFLS elicit expenditure on durable goods. JSTAR also asks about the change in expenditure on durable goods compared to the previous year.

2.7.1 Respondent

In CHARLS, expenditure questions are answered by the household/family respondent, that is, the person most knowledgeable about household finances and budget. In HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In IFLS, expenditure questions are answered by females respondents, either the spouse of the household head or another person most knowledgeable about household affairs. In JSTAR the only sample participant within the household answers these questions.

2.7.2 Unit of observation

HRS, CHARLS, JSTAR and IFLS elicit expenditure on durable goods at the household level. A household is defined as individuals living in the same dwelling.

2.7.3 Reference period

HRS, CHARLS, JSTAR and IFLS ask for expenditure on durable goods in the past year.

2.7.4 Durable goods expenditure categories

Durable goods can be of many different kinds, which are explicitly mentioned by the questionnaire is survey specific. Table 7 shows the particular items included in this measure across surveys.

Comparable measure of (Other) household expenditure

Since each survey asks for expenditure on different kinds of durable goods, it is not possible to construct a measure that is comparable across surveys.

Table 7. Summary of Questions about Durable Goods Expenditure

	HRS	IFLS	JSTAR	CHARLS
Unit of observation	Household	Household	Household	Household
Reference period	Past year	Past year	Past year	Past year
Categories/Measure Type:				
Furniture	YES	NA	NA	YES
Refrigerator, Microwave oven	YES	NA	YES	YES
Washing Machine	YES	NA	YES	YES
TV, Video/DVD players	YES	YES	YES	YES
Musical instruments	NA	NA	NA	YES
Computer	YES	NA	YES	YES
Cell phones	NA	YES	NA	NA
Asked about "change in living expenditure" compared to previous year?	NA	NA	YES	NA
Cross Country Comparison	D	D	D	D

D: Different, NA: Not Asked

2.8 Measures of Total Expenditure

Questions on total expenditure are asked by HRS, JSTAR and MHAS.

2.8.1 Respondent

In HRS/CAMS, the respondent is the household female. Males answer only if females refuse to be interviewed. In a same-sex couple, questions are answered by the primary respondent. In JSTAR the only sample participant within the household answers these questions. In MHAS questions are answered by all interviewed respondents within the household.

2.8.2 Unit of observation

HRS, JSTAR and MHAS elicit total expenditure at the household level. A household is defined as individuals living in the same dwelling.

2.8.3 Reference period

HRS, JSTAR and MHAS elicit total expenditure in the past year.

2.8.4 Total expenditure categories

HRS, JSTAR and MHAS all specify the items that should be excluded when the total household expenditure is reported. HRS mentions any money saved or invested (including money invested in real estate). JSTAR mentions expenditure on rent, housing loan payments, other housing costs and purchase of durable goods. MHAS instructs to exclude the value of goods produced for home consumption.

Comparable measure of total expenditure

Since each survey instructs its respondents to exclude different types of expenditure from total household expenditure, it is not possible to construct comparable measures across surveys.

Table 8. Summary of Questions about Total Expenditure

	HRS	MHAS	JSTAR
Unit of observation	Household	Household	Household
Reference Period	Last year	Last year	Last year
Categories/Measure Type:			
Excluded items	Investment, including real estate investments	The value of goods produced for home consumption	Rent, housing loan payments, other housing costs, purchase of durable goods
Cross Country Comparison	D	D	D

D: Different

3. QUESTIONNAIRE

3.1 HRS (CAMS)

3.1.1 Food Expenditure

B37 Food and beverages: food and drinks, including alcoholic, that you buy in grocery or other stores \$_____ per week OR \$_____ per month OR \$_____ in last 12 months OR \$0

B38 Dining and/or drinking out: items in restaurants, cafes, and diners, including takeout food \$_____ per week OR \$_____ per month OR \$_____ in last 12 months OR \$0

3.1.2 Automobile Expenditure

B1. In the past twelve months, has your household leased or purchased an automobile or truck? (If it was a lease, we are asking about new long-term leases). ____ Yes ____ No

If so, what were the make, model, year and price of the vehicle(s) you purchased or leased? (Car 1) :

_____ \$_____ Make Model Year Price New or used?

(Car 2) : _____ \$_____ Make Model Year Price New or used?

(Car 3) : _____ \$_____ Make Model Year Price New or used?

3.1.3 Education Expenditure

N.A.

3.1.4 Medical Expenditure

B11 Health insurance: out-of-pocket, including Medicare supplemental insurance \$ _____ OR \$0

B31 Prescription and nonprescription medications: out-of-pocket cost, not including what's covered by insurance \$_____ per month OR \$_____ in last 12 months OR \$0

B32 Health care services: out-of-pocket cost of hospital care, doctor services, lab tests, eye, dental, and nursing home care \$_____ per month OR \$_____ in last 12 months OR \$0

B33 Medical supplies: out-of-pocket cost, not including what's covered by insurance \$_____ per month OR \$_____ in last 12 months OR \$0

3.1.5 Clothing Expenditure

B29 Clothing and apparel: including footwear, outerwear, and products such as watches or jewelry \$_____ per month OR \$_____ in last 12 months OR \$0

3.1.6 (Other) Household Expenditure

B7 Homeowner's or renter's insurance \$ _____ OR \$0

B8 Property taxes \$ _____ OR \$0

B9 Vehicle insurance \$ _____ OR \$0

B10 Vehicle maintenance: parts, repairs, and servicing \$ _____ OR \$0

B12 Trips and vacations: including transportation, accommodations, and recreational expenses on trips \$ _____ OR \$0

B13 Home repairs and maintenance: materials your household bought directly \$ _____ OR \$0

B14 Home repairs and maintenance services: hiring costs including materials they provided \$ _____
OR \$0

B16 Contributions to religious, educational, charitable, or political organizations \$ _____ OR \$0

B17 Cash or gifts to family and friends outside your household: including alimony and child support
payments \$ _____ OR \$0

B18 Mortgage \$ _____ per month OR \$ _____ in last 12 months OR \$0

B19 Rent \$ _____ per month OR \$ _____ in last 12 months OR \$0

B20 Electricity \$ _____ per month OR \$ _____ in last 12 months OR \$0

B21 Water \$ _____ per month OR \$ _____ in last 12 months OR \$0

B22 Heating fuel for the home \$ _____ per month OR \$ _____ in last 12 months OR \$0 B23

Telephone, cable, internet \$ _____ per month OR \$ _____ in last 12 months OR \$0

B25 Housekeeping supplies: cleaning and laundry products \$ _____ per month OR \$ _____ in last 12
months OR \$0

B26 Housekeeping, dry cleaning and laundry services: hiring costs for housekeeping or home cleaning,
and amount spent at dry cleaners and laundries \$ _____ per month OR \$ _____ in last 12 months OR
\$0

B27 Gardening and yard supplies: yard, lawn and garden products \$ _____ per month OR \$ _____ in
last 12 months OR \$0

B28 Gardening and yard services: hiring costs including materials they provided \$ _____ per month OR
\$ _____ in last 12 months OR \$0

B30 Personal care products and services: including hair care, shaving and skin products, amount spent at
hair dresser, manicure, etc. \$ _____ per month OR \$ _____ in last 12 months OR \$0

B34 Tickets to movies, sporting events, and performing arts \$ _____ per month OR \$ _____ in last 12
months OR \$0

B35 Sports: including gym, exercise equipment such as bicycles, skis, boats, etc. \$ _____ per month OR
\$ _____ in last 12 months OR \$0

B36 Hobbies and leisure equipment: such as photography, stamps, reading materials, camping, etc.
\$ _____ per month OR \$ _____ in last 12 months OR \$0

B39 Gasoline \$ _____ per week OR \$ _____ per month OR \$ _____ in last 12 months OR \$0

3.1.7 Durable Goods Expenditure (excluding automobiles)

B2. In the past twelve months, has your household purchased a refrigerator?

About how much was the purchase price? \$ _____

B3. In the past twelve months, has your household purchased a washing machine and/or dryer?

About how much was the purchase price? \$ _____

B4. In the past twelve months, has your household purchased a dishwasher?

About how much was the purchase price? \$ _____

B5. In the past twelve months, has your household purchased a television?

About how much was the purchase price? \$ _____

B6. In the past twelve months, has your household purchased a computer?

About how much was the purchase price? \$ _____

B15 Household furnishings and equipment: such as furniture, floor coverings, small appliances,
miscellaneous household equipment \$ _____ OR \$0

3.1.8 Total Expenditure

Now think of your household's TOTAL spending last year. Please do NOT include any money that you
saved or that you invested, including real estate investments, like home purchases.

B40. Last year, my household spent: (Check one.) ____ More than its income About how much more?
\$ _____ Less than its income About how much less? \$ _____ About the same as its
income ____ Uncertain, can't say

3.2MHAS

3.2.1 Food Expenditure

N.A.

3.2.2 Automobile Expenditure

N.A.

3.2.3 Education Expenditure

N.A.

3.2.4 Medical Expenditure

N.A.

3.2.5 Clothing Expenditure

N.A.

3.2.6 (Other) Household Expenditure

N.A.

3.2.7 Durable Goods Expenditure (excluding automobiles)

N.A.

3.2.8 Total Expenditure

K85. In total, about how much do you spend in a month for household expenditures? Exclude the value of what you produce for home consumption.

Amount _____

RF -----8888888

DK-----9999999

K86a. Would you say it is more than \$4,000 pesos per month?

1. YES

2. NO

9. DK

K86b. Would you say it is more than \$2,000 pesos per month?

1. YES
2. NO
9. DK

K86c. Would you say it is more than \$7,000 pesos per month?

1. YES
2. NO
9. DK

3.3 ELSA

3.3.1 Food Expenditure

HoFood. Now thinking about *your household's* weekly food bills, approximately how much do you usually spend in total on food and groceries - include all food, bread, milk, soft drinks, and meals on wheels. Exclude pet food, alcohol, cigarettes and meals out?

WRITE IN TO NEAREST£.

Range: 0~9997

CHECK: IF spends more than £300 per week: HoFood > 300, INTERVIEWER:

"Are you sure? ^Response at HoFood seems high - please check."

IF doesn't know or refused to give weekly food expenditure: HoFood = DK OR HoFood = RF

HoOutf. Approximately how much do you usually spend in a week in total on takeaways and food consumed out of the home - include all food consumed out of home e.g. restaurants, meals consumed at the workplace, etc?

WRITE IN TO NEAREST £

Range: 0~9997

IF doesn't know or refused to give weekly expenditure on food consumed out of home: HoOutf = DK OR HoOutf = RF

3.3.2 Automobile Expenditure

N.A.

3.3.3 Education Expenditure

N.A.

3.3.4 Medical Expenditure

N.A.

3.3.5 Clothing Expenditure

N.A.

3.3.6 (Other) Household Expenditure

(WAVE 1~5)

HoBA, hoba2-hoba13. How much was your last rent payment? (per week)

Enter amount.

Range 0~99997

3.3.7 Durable Goods Expenditure (excluding automobiles)

N.A.

3.3.8 Total Expenditure

N.A.

3.4 SHARE

3.4.1 Food Expenditure

(WAVE 1, 2)

CO002. AMOUNT SPENT ON FOOD AT HOME

Please look at card 31. Thinking about the last 12 months: about how much did your household spend in a typical month on food to be consumed at home?

IWER: AMOUNT IN [{{local currency}}]

enter an amount

CO003. AMOUNT SPENT ON FOOD OUTSIDE THE HOME

Please look at card 31. Still thinking about the last 12 months: about how much did your household spend in a typical month on food to be consumed outside home?

IWER: AMOUNT IN [{{local currency}}]

enter an amount

CO011. VALUE OF HOME PRODUCED FOOD

What is the value of the home produced food that you consumed in a typical month during the last year? In other words, how much would you have paid for this food if you had to buy it?

Enter an amount

3.4.2 Automobile Expenditure

N.A.

3.4.3 Education Expenditure

N.A.

3.4.4 Medical Expenditure

N.A.

3.4.5 Clothing Expenditure

N.A.

3.4.6 (Other) Household Expenditure

(WAVE 1, 2)

CV0004. AMOUNT SPENT ON TELEPHONES IN LAST MONTH

Please look at card 31. Again, in the last 12 months: about how much was your household's expenditure on telephone calls and charges in a typical month?

IWER: AMOUNT IN [local currency]

Enter an amount

3.4.7 Durable Goods Expenditure

N.A.

3.4.8 Total Expenditure

N.A.

3.5 KLoSA

3.5.1 Food Expenditure

(WAVE 2, 3, 4)

E207. What was your household's average monthly expenditure on food in the last calendar year (2007)? (unit: 10,000 Korean won)

_____ MW [range:0~9997] →Go to E213

Don't know →Go to E208~E212 unfolding

Refuse to answer →Go to E208~E212 unfolding

E208. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)?

1. Less than 10 MW
3. About 10 MW
5. More than 10 MW

E209. Did it amount to a total of less than, about equal to or more than 30 MW (10,000 Korean won) in the last calendar year (2007)?

1. Less than 30 MW
3. About 30 MW
5. More than 30 MW

E210. Did it amount to a total of less than, about equal to or more than 40 MW (10,000 Korean won) in the last calendar year (2007)?

1. Less than 40 MW
3. About 40 MW
5. More than 40 MW

E211. Did it amount to a total of less than, about equal to or more than 60 MW (10,000 Korean won) in the last calendar year (2007)?

1. Less than 60 MW
3. About 60 MW
5. More than 60 MW

E212. Did it amount to a total of less than, about equal to or more than 100 MW (10,000 Korean won) in the last calendar year (2007)?

1. Less than 100 MW
3. About 100 MW
5. More than 100 MW

E213. What was your household's average monthly expenditure on dining out in the last calendar year (2007)? (unit: 10,000 Korean won) [IWER: Every meal eaten outside of the home is included in the costs of dining out.]

_____MW [range:0~9997] →Go to E219

Don't know →Go to E214~E218 unfolding

Refuse to answer →Go to E214~E218 unfolding

< E214~E218. Unfolding bracket questions >

E214. Did it amount to a total of less than, about equal to or more than 5 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E213 and record if R answers the amount during the interview.]

1. Less than 5 MW
3. About 5 MW
5. More than 5 MW

E215. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E213 and record if R answers the amount during the interview.]

1. Less than 10 MW
3. About 10 MW
5. More than 10 MW

E216. Did it amount to a total of less than, about equal to or more than 20 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E213 and record if R answers the amount during the interview.]

1. Less than 20 MW
3. About 20 MW
5. More than 20 MW

E217. Did it amount to a total of less than, about equal to or more than 30 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E213 and record if R answers the amount during the interview.]

1. Less than 30 MW
3. About 30 MW
5. More than 30 MW

E218. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E213 and record if R answers the amount during the interview.]

1. Less than 50 MW
3. About 50 MW
5. More than 50 MW

3.5.2 Automobile Expenditure

N.A.

3.5.3 Education Expenditure

(WAVE 2,3,4)

E219. What was your household's average monthly expenditure on public education (tuition, textbooks, materials, etc.) in the last calendar year (2007)? (unit: 10,000 Korean won) [IWER: Boarding expenses incurred during the course of education are included in housing costs, so record them in E231.]

_____MW [range:0~9997] →Go to E225

Don't know →Go to E220~E224 unfolding

Refuse to answer →Go to E220~E224 unfolding

E220. Did it amount to a total of less than, about equal to or more than 5 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E219 and record if R answers the amount during the interview.]

1. Less than 5 MW
3. About 5 MW
5. More than 5 MW

E221. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E219 and record if R answers the amount during the interview.]

1. Less than 10 MW
3. About 10 MW
5. More than 10 MW

E222. Did it amount to a total of less than, about equal to or more than 30 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E219 and record if R answers the amount during the interview.]

1. Less than 30 MW

- 3. About 30 MW
- 5. More than 30 MW

E223. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E219 and record if R answers the amount during the interview.]

- 1. Less than 50 MW
- 3. About 50 MW
- 5. More than 50 MW

E224. Did it amount to a total of less than, about equal to or more than 100 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E219 and record if R answers the amount during the interview.]

- 1. Less than 100 MW
- 3. About 100 MW
- 5. More than 100 MW

E225. What was your household's average monthly expenditure on private education (private educational institutions, tutoring, textbooks, materials, etc.) in the last calendar year (2007)? (unit: 10,000 Korean won)

_____MW [range:0~9997] →Go to E231

Don't know →Go to E226~E230 unfolding

Refuse to answer →Go to E226~E230 unfolding

E226. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E225 and record if R answers the amount during the interview.]

- 1. Less than 10 MW
- 3. About 10 MW
- 5. More than 10 MW

E227. Did it amount to a total of less than, about equal to or more than 20 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E225 and record if R answers the amount during the interview.]

- 1. Less than 20 MW
- 3. About 20 MW
- 5. More than 20 MW

E228. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E225 and record if R answers the amount during the interview.]

- 1. Less than 50 MW
- 3. About 50 MW
- 5. More than 50 MW

E229. Did it amount to a total of less than, about equal to or more than 100 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E225 and record if R answers the amount during the interview.]

1. Less than 100 MW
3. About 100 MW
5. More than 100 MW

E230. Did it amount to a total of less than, about equal to or more than 200 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E225 and record if R answers the amount during the interview.]

1. Less than 200 MW
3. About 200 MW
5. More than 200 MW

3.5.4 Medical Expenditure

E237. What was your household's average monthly medical expenditure (excluding health insurance premiums) in the last calendar year (2007)? (unit: 10,000 Korean won)

_____ MW [range:0~9997] →Go to E243

Don't know →Go to E238~E242 unfolding

Refuse to answer →Go to E238~E242 unfolding

E238. Did it amount to a total of less than, about equal to or more than 5 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E237 and record if R answers the amount during the interview.]

1. Less than 5 MW
3. About 5 MW
5. More than 5 MW

E239. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E237 and record if R answers the amount during the interview.]

1. Less than 10 MW
3. About 10 MW
5. More than 10 MW

E240. Did it amount to a total of less than, about equal to or more than 20 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E237 and record if R answers the amount during the interview.]

1. Less than 20 MW
3. About 20 MW
5. More than 20 MW

E241. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E237 and record if R answers the amount during the interview.]

1. Less than 50 MW

- 3. About 50 MW
- 5. More than 50 MW

E242. Did it amount to a total of less than, about equal to or more than 100 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E237 and record if R answers the amount during the interview.]

- 1. Less than 100 MW
- 3. About 100 MW
- 5. More than 100 MW

3.5.5 Clothing Expenditure (WAVE 2,3,4)

E243. What was your household's average monthly expenditure on clothing (clothes, shoes, etc.) in the last calendar year (2007)? (unit: 10,000 Korean won)

_____ MW [range:0~9997] →Go to E249

Don't know →Go to E244~E248 unfolding

Refuse to answer →Go to E244~E248 unfolding

E244. Did it amount to a total of less than, about equal to or more than 5 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E243 and record if R answers the amount during the interview.]

- 1. Less than 5 MW
- 3. About 5 MW
- 5. More than 5 MW

E245. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E243 and record if R answers the amount during the interview.]

- 1. Less than 10 MW
- 3. About 10 MW
- 5. More than 10 MW

E246. Did it amount to a total of less than, about equal to or more than 20 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E243 and record if R answers the amount during the interview.]

- 1. Less than 20 MW
- 3. About 20 MW
- 5. More than 20 MW

E247. Did it amount to a total of less than, about equal to or more than 30 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E243 and record if R answers the amount during the interview.]

- 1. Less than 30 MW
- 3. About 30 MW
- 5. More than 30 MW

E248. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E243 and record if R answers the amount during the interview.]

1. Less than 50 MW
3. About 50 MW
5. More than 50 MW

3.5.6 (Other) Household Expenditure

(WAVE 2,3,4)

E201. Now I am going to ask you about your living costs and related items in the last calendar year (2007). Related items include food and dining out, public and private education, housing, medical, and clothing expenditures. First, what was your household's average monthly living cost in the last calendar year (2007)? (unit: 10,000 Korean won)

_____MW [range:0~9997] →Go to E207

Don't know →Go to E202~E206 unfolding

Refuse to answer →Go to E202~E206 unfolding

E202. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E201 and record if R answers the amount during the interview.]

1. Less than 50 MW
3. About 50 MW
5. More than 50 MW

E203. Did it amount to a total of less than, about equal to or more than 100 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E201 and record if R answers the amount during the interview.]

1. Less than 100 MW
3. About 100 MW
5. More than 100 MW

E204. Did it amount to a total of less than, about equal to or more than 200 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E201 and record if R answers the amount during the interview.]

1. Less than 200 MW
3. About 200 MW
5. More than 200 MW

E205. Did it amount to a total of less than, about equal to or more than 300 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E201 and record if R answers the amount during the interview.]

1. Less than 300 MW
3. About 300 MW
5. More than 300 MW

E206. Did it amount to a total of less than, about equal to or more than 500 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E201 and record if R answers the amount during the interview.]

1. Less than 500 MW
3. About 500 MW
5. More than 500 MW

E231. What was your household's average monthly expenditure on housing (monthly rent, utilities including electricity, water and gas, etc.) in the last calendar year (2007)? (unit: 10,000 Korean won) [IWER: Boarding expenses are included in housing costs.]

_____MW [range:0~9997] →Go to E237

Don't know →Go to E232~E236 unfolding

Refuse to answer →Go to E232~E236 unfolding

E232. Did it amount to a total of less than, about equal to or more than 5 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E231 and record if R answers the amount during the interview.]

1. Less than 5 MW
3. About 5 MW
5. More than 5 MW

E233. Did it amount to a total of less than, about equal to or more than 10 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E231 and record if R answers the amount during the interview.]

1. Less than 10 MW
3. About 10 MW
5. More than 10 MW

E234. Did it amount to a total of less than, about equal to or more than 20 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E231 and record if R answers the amount during the interview.]

1. Less than 20 MW
3. About 20 MW
5. More than 20 MW

E235. Did it amount to a total of less than, about equal to or more than 50 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E231 and record if R answers the amount during the interview.]

1. Less than 50 MW
3. About 50 MW
5. More than 50 MW

E236. Did it amount to a total of less than, about equal to or more than 100 MW (10,000 Korean won) in the last calendar year (2007)? [IWER: Go back to E231 and record if R answers the amount during the interview.]

1. Less than 100 MW
3. About 100 MW

5. More than 100 MW

3.5.7 Durable Goods Expenditure (excluding automobiles)

N.A.

3.5.8 Total Expenditure

N.A.

3.6 IFLS

3.6.1 Food Expenditure

KS02. During the past week, what was the total expenditure to purchase item?

ITEM

A. Hulled, uncooked rice

B. Corn

C. Sago/flour

D. Cassava, tapioca, dried cassava

E. Other staple foods, like sweet potatoes, potatoes, yams

F. Kangkung, cucumber, spinach, mustard greens, tomatoes, cabbage, katuk, green beans, string beans and the like.

G. Beans like mung-beans, peanuts, soya-beans, and the like.

H. Fruits like papaya, mango, banana and the like.

I. Noodles, rice noodles, macaroni, shrimp chips, other chips, and the like

J. Cookies, breads, crackers

K. Beef, mutton, water buffalo meat and the like

L. Chicken, duck and the like

M. Fresh fish, oysters, shrimp, squid and the like.

N. Salted fish, smoked fish

OA. Other dishes, like: Jerky, shredded beef, canned meat, sardine and the like

OB. Tofu, tempe, other side dishes

P. Eggs

Q. Fresh milk, canned milk, powdered milk and the like

R. Sweet and salty soy sauce

S. Salt

T. Shrimp paste

U. Chili sauce, tomato sauce, and the like

V. Shallot, garlic, chili, candle nuts, coriander, MSG and the like

W. Javanese (brown) sugar

X. Butter

Y. Cooking oil like coconut oil, peanut oil, corn oil, palm oil and the like

Z. Drinking water

AA. Granulated sugar

BA. Coffee

CA. Tea

- DA. Cocoa
- EA. Soft drinks like Fanta, Sprite, etc
- FA. Alcoholic beverages like beer, palm wine, rice wine, etc
- GA. Betel nut (for chewing, traditional drug, others)
- HA. Cigarettes, tobacco
- IA. Prepared food (eaten at home)
- IB. Prepared food (away from home)

KS15. Now we would like to know about the quantity and price of foods that you have purchased in the last month. How much did you pay for that amount?

- A. Rice
 - M. Beef
 - N. Chicken
 - C. Fish
 - H1. Kangkung
 - H3. Spinach
 - E. Cooking Oil
 - F. Granulated Sugar
 - K. Kerosene
- _____Rp.

KSR42. Now we want to ask about purchases of kerosene, sugar, and cooking oil that this household may have made in the last 12 months through Market Operations. The last time you bought [], what was the total amount that you spent buying [] from the market operation?

- D. Granulated Sugar
- J. Cooking oil
- K. Kerosene

- 1. _____Rp.
- 8. Don't know

3.6.2 Automobile Expenditure

KS08. What were the total expenditures by all household members for [...] during the past year, namely since the month of [...] last year?

- F. Other expenditures not specified above. Including the purchase of cars, house, television sets, handphones, beds livestock and the like.

3.6.3 Education Expenditure

KS10a. Approximately what was the total expenditures (e.g., tuition, PTA contribution, school committee contribution, laboratory, registration, exams, other contribution like student associations) for [...] during the past year?

- A. Children/family members inside the household _____Rp.
- B. Children/family members outside the household _____Rp.

KS11a. Approximately what was the total of expenditures for schooling needs (like for school uniforms, school supplies) for [...] during the past year?

- A. Children/family members inside the household _____Rp.
- B. Children/family members outside the household _____Rp.

KS12a. Approximately how much was spent on transportation and pocket money, special courses associated with [...]’s schooling in the past year?

- A. Children/family members inside the household _____Rp.
- B. Children/family members outside the household _____Rp.

KS12b. Approximately how much was the total cost of boarding/room rent (including meals) spent for [...] during the past year?

- A. Children/family members inside the household _____Rp.
- B. Children/family members outside the household _____Rp.

3.6.4 Medical Expenditure

KS08. What were the total expenditures by all household members for [...] during the past year, namely since the month of [...] last year?

C. Medical costs. Including hospitalization costs, clinic charges, physician’s fee, traditional healer’s fee, medicines and the like

3.6.5 Clothing Expenditure

(WAVE 1,2)

KS08. What were the total expenditures by all household members for [...] during the past year, namely since the month of [...] last year?

A. Clothing for children and adults. Including shoes, hats, shirts, pants, children clothing and the like.

3.6.6 (Other) Household Expenditure

KS06. What were the total expenditures by all household members for [...] during the past month, namely since date [...] one month ago?

A1. Electricity

A2. Water

A3. Fuel

A4. Telephone (including vouchers and mobile starter pack)

B. Personal toiletries. Including soap, shaving supplies, cosmetics and the like

C. Household items. Including laundry soap, cleaning supplies, anti-mosquitoes and the like.

C1. Domestic services and servants’ wages

D. Recreation and Entertainment. Including movies, theater, outings, sport equipment, newspapers, magazines and the like.

E. Transportation. Including bus fare, cab fare, vehicle repair costs, gasoline and the like.

F1. Sweepstakes and the like

F2. Arisan

G. Value of non-food items given to others/other parties outside the household on a regular basis (including debt repayment)

KS08. What were the total expenditures by all household members for [...] during the past year, namely since the month of [...] last year?

B. Household supplies and furniture. Including tables, chairs, kitchen tools, bed sheets, towels and the like.

D. Ritual ceremonies, charities and gifts. Including weddings, circumcisions, tithe, charities, gifts and the like.

E. Taxes. Including property tax, vehicle tax, income tax, sales tax and the like.

G. Value of non-food items given to others/other parties outside the household on an irregular basis (less than twelve times per year).

3.6.7 Durable Goods Expenditure (excluding automobiles)

KS08. What were the total expenditures by all household members for [...] during the past year, namely since the month of [...] last year?

F. Other expenditures not specified above. Including the purchase of cars, house, television sets, handphones, beds, livestock and the like.

3.6.8 Total Expenditure

KS08. What were the total expenditures by all household members for [...] during the past year, namely since the month of [...] last year?

3.7 JSTAR

3.7.1 Food Expenditure (WAVE 1,2,3)

E-047. Please think about the last year. In a typical month, about how much did you spend on food (not including eating out)? [Interviewer: Please enter the amount. If respondent says he or she does not know the amount, try to encourage him or her to answer by asking the questions below.]

[Instructions for interviewer to read:] A rough estimate is fine. Can you answer?

1. Approximately ____ yen
2. Don't know
3. Refused to answer

E-047-1,2,3. In a typical month, did you spend more/less than ____ yen (not including eating out)?

[Interviewer selects figure and greater or less.]

1. Yes
2. No
3. Don't know
4. Refused to answer

E-048. Please think about the last year. In a typical month, did you go out to eat? If so, about how much did you spend per month? [Interviewer: Please enter the amount. If respondent says he or she does not know the amount, try to encourage him or her to answer by asking the questions below.]

[Instructions for interviewer to read:] A rough estimate is fine. Can you answer?

1. Approximately ____ yen
2. Did not eat out

3. Don't know
4. Refused to answer

E-048-1,2,3. In a typical month, did you spend more/less than ___ yen eating out? [Interviewer selects figure and greater or less.]

1. Yes
2. No
3. Don't know
4. Refused to answer

E-052-6. [Interviewer: Ask question after showing card E-052-6.] In the past year, about how much did the amount your household spends on food change compared to previous years?

1. Increased by 30% or more
2. Increased 20~30%
3. Increased 10~20%
4. Increased by less than 10%
5. Didn't change significantly
6. Decreased by less than 10%
7. Decreased by 10~20%
8. Decreased by 20~30%
9. Decreased by more than 30%

E-052-7. [Interviewer: Ask question after showing card E-052-7.] In the past year, about how much did the amount your household spends on eating out change compared to previous years?

1. Increased by 30% or more
2. Increased 20~30%
3. Increased 10~20%
4. Increased by less than 10%
5. Didn't change significantly
6. Decreased by less than 10%
7. Decreased by 10~20%
8. Decreased by 20~30%
9. Decreased by more than 30%

3.7.2 Automobile Expenditure

(WAVE 1,2,3)

E-051-2. About how often do you purchase a new automobile?

1. Every ___ years
2. Don't know
3. Refused to answer

E-051-3. About how much do you typically pay for an automobile? If you buy a new vehicle, state how much you pay for it new; if you buy it used, state how much you pay for a used vehicle. [Interviewer: Please enter the amount. If respondent says he or she does not know the amount, try to encourage him or her to answer by asking the questions below.]

[Instructions for interviewer to read:] A rough estimate is fine. Can you answer?

1. Approximately ____ yen
2. Don't know
3. Refused to answer

3.7.3 Education Expenditure

N.A.

3.7.4 Medical Expenditure

N.A.

3.7.5 Clothing Expenditure

N.A.

3.7.6 (Other) Household Expenditure

(WAVE 1,2,3)

E-052-5. [Interviewer: Ask question after showing card E-052-5.] In the past year, about how much did the amount your household spends on living expenses change compared to previous years? Do not include rent, housing loan payments or other housing costs, or the purchase of durable goods (television, refrigerator, etc.).

1. Increased by 30% or more
2. Increased 20~30%
3. Increased 10~20%
4. Increased by less than 10%
5. Didn't change significantly
6. Decreased by less than 10%
7. Decreased by 10~20%
8. Decreased by 20~30%
9. Decreased by more than 30%

3.7.7 Durable Goods Expenditure (excluding automobiles)

E-050. In the past year, about how much did your household spend on electrical items or other durable goods (television, video/DVD player, computer, refrigerator, microwave oven, washing machine, dishwasher, etc.)? (Do not include the purchase of automobiles.) [Do not include farm implements or other work-related items.]

1. Approximately ____ yen
2. Don't know
3. Refused to answer

E-050-1,2,3. In the past year, did your household spend more/less than ___ yen on electrical items or other durable goods (television, video/DVD player, computer, refrigerator, microwave oven, washing machine, dishwasher, etc.)? [Interviewer selects figure and greater or less.]

1. Yes
2. No
3. Don't know
4. Refused to answer

E-052-8. [Interviewer: Ask question after showing card E-052-8.] In the past year, about how much did the amount your household spends on electrical items or other durable goods (television, video/DVD player, computer, refrigerator, microwave oven, washing machine, dishwasher, etc.) change compared to previous years? [Do not include farm implements or other work-related items.]

1. Increased by 30% or more
2. Increased 20~30%
3. Increased 10~20%
4. Increased by less than 10%
5. Didn't change significantly
6. Decreased by less than 10%
7. Decreased by 10~20%
8. Decreased by 20~30%
9. Decreased by more than 30%

3.7.8 Total Expenditure (WAVE 1,2,3)

E-049. In a typical month, about how much money did you spend overall? Do not include rent, housing loan payments or other housing costs, or the purchase of durable goods (television, refrigerator, etc.). [Interviewer: Please enter the amount. If respondent says he or she does not know the amount, try to encourage him or her to answer by asking the questions below.] [Include electricity/heating, private life insurance, non-life insurance premiums, etc.]

[Instructions for interviewer to read:] A rough estimate is fine. Can you answer?

1. Approximately ___ yen
2. Don't know
3. Refused to answer

E-049-1,2,3. In a typical month, did you spend more/less than ___ yen? Do not include rent, housing loan payments or other housing costs, or the purchase of durable goods (television, refrigerator, etc.). [Interviewer selects figure and greater or less.]

1. Yes
2. No
3. Don't know

3.8 TILDA

3.8.1 Food Expenditure

N.A.

3.8.2 Automobile Expenditure

N.A.

3.8.3 Education Expenditure

N.A.

3.8.4 Medical Expenditure

N.A.

3.8.5 Clothing Expenditure

N.A.

3.8.6 (Other) Household Expenditure

N.A.

3.8.7 Durable Goods Expenditure

N.A.

3.8.8 Total Expenditure

N.A.

3.9 CHARLS

3.9.1 Food Expenditure

(WAVE 1,2)

GE006. In the past week, what was the value of household consumption of food, including both food purchased and food eaten from your own production (excluding eating out expenditure, alcohol, Cigarettes, cigars and tobacco expenditure) ?

GE007. Among it, how much did your household spend on eating out?

(WAVE 2)

GE006_W2_1 In the past week, what was the market value of the food that members of the household consumed that you grew yourselves?

GE008 Among it, how much did your household spend on alcohol, Cigarettes, cigars and tobacco?

3.9.2 Automobile Expenditure

GE010. In the last year how much did your household spend on the following items?

11. Automobiles (WAVE 1)

6. Automobiles (WAVE 2)

3.9.3 Education Expenditure

(WAVE 1,2)

GE010. In the last year how much did your household spend on the following items?

5. Education and training(including tuition, training fees, etc)

3.9.4 Medical Expenditure

GE010. In the last year how much did your household spend on the following items?

6. Medical expenditure

3.9.5 Clothing Expenditure

GE010. In the last year how much did your household spend on the following items?

1. Clothing and bedding

3.9.6 (Other) Household Expenditure

(WAVE1,2)

GE009 Please tell me the expenditure last month for your household for the following items.

1. Communication fees (including post, internet usage, telephone and cell phone)

2. Utilities: Water and electricity

3. Fuels (including gas, coal, etc)

4. Fees for Matron, housekeepers and servants

5. Local Transportation

6. Household items and personal toiletries that are used daily plus beauty treatments (e.g., detergent, soap, toothpaste, toothbrush, cosmetics, beauty salon, etc.)

7. Entertainment (including fees to buy books, newspapers, VCCs, DVDs, going to cinema and bars).

GE010. In the last year how much did your household spend on the following items?

13. Property management fees (WAVE1)

11. Property management fees (WAVE2)

3.9.7 Durable Goods Expenditure

GE010. In the last year how much did your household spend on the following items?

4. Furniture and consumption of durable goods, includes refrigerator, washing machine, TV and expensive instruments like piano

12. Electronics (laptops, computers and accessories, video games etc.)

3.9.8 Total Expenditure

N.A.