

SOCIAL DIAGNOSIS 2013

THE OBJECTIVE AND SUBJECTIVE QUALITY

OF LIFE IN POLAND

REPORT

Edited by

Janusz Czapiński

Tomasz Panek



HUMAN CAPITAL
NATIONAL COHESION STRATEGY



MINISTRY OF LABOUR
AND SOCIAL POLICY

EUROPEAN UNION
EUROPEAN
SOCIAL FUND



Warsaw: The Council for Social Monitoring

Warsaw, 2014

The opinions and conclusions contained herein represent the authors' personal views and do not necessarily reflect the official position of the Ministry of Labour and Social Policy.

The following publication was prepared as part of the *Social Diagnosis 2009-2013* system project realised by the Human Resources Development Fund (CRZL) and initiated by the Department of Economic Analyses and Forecasts (Ministry of Labour and Social Policy).

Translation and typesetting:

University of Finance and Management in Warsaw – Emil Tchorek.

Proofreading:

1. University of Finance and Management in Warsaw
2. Emil Tchorek

SBN 978-83-61638-47-6

The following publication was co-financed by the European Union within the framework of the European Social Fund.



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Free publication

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Main sponsors of the project

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University of Finance and Management in Warsaw

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Media sponsorship

The  weekly

Radio TOK FM

Research carried out by: the Polish Statistical Association

Organisational and financial project management: Office for Statistical Analyses and Research of the Polish Statistical Association and the University of Finance and Management in Warsaw

Interviewers: Central Statistical Office

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Although financed from both private and public resources – the current edition from the Human Capital Operational Programme (from ESF funds), a research grant from the National Centre of Science and funds from the National Bank of Poland – the *Social Diagnosis* study is an entirely public undertaking. The database of cumulated data from seven waves (of 2000, 2003, 2005, 2007, 2009, 2011 and 2013) is available free of charge at the website www.diagnoza.com.

Annex 1. Questionnaires and instructions

1.1. Household questionnaire

Subsequent number of the questionnaire in the Voivodeship
Fixed household number (for previously studied households)

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SOCIAL DIAGNOSIS 2013

An independent survey of the conditions and quality of life in Poland

PART I

A. HOUSEHOLD CHARACTERISTICS

0. Household status in the survey

Voivodeship powiat gmina

1. Territorial symbol

2. Address (street, house no., flat no., postcode and town/city)

.....

area code landline mobile (if there is no landline phone)

2b. telephone no.

and – if available – e-mail address.....

3. Symbol of the place of residence category

4. Household identification number

5. Number of families in the household

6. Symbol of the source of income for the household

7. Number of all persons in the household

8. Number of all persons in the household aged at least 15 as of 1 March 2011

B. INFORMATION ON THE CONDUCTED INTERVIEW

1. Course of the visits to the household's dwelling

Visit number	Date of the visit day/month	Time of the visit	Duration of the visit in minutes	Notes
1				
2				
3				

2. The interview in the household was:

1. conducted
2. not conducted.

If the interview was not conducted (answer no. 2), provide the reasons (point 3). If the interview was conducted, fill in the collective information on the individual interviews.

3. The reasons for the interview being not conducted

Choose one of the options given below and write its number in the boxes.

Although the household was contacted, the interview was not conducted because

- 1. the household is unable to take part in the survey (old age, illness, alcohol intoxication)
- 2. the household members are foreigners (beyond the scope of the survey)
- 3. the household initially refused to take part in the survey (it is possible it will be willing to take part in the survey in the coming years)
- 4. the household definitely refused to take part in the survey now or in the future

It was not possible to contact the household (although it was localised) because:

- 5. all household members were temporarily absent due to their stay abroad
- 6. all household members were temporarily absent due to a holiday trip
- 7. all household members were temporarily absent due to other or unknown reasons
- 8. no one was present at home.

The household could not be localised because:

- 9. the address provided on the list could not be localised (e.g. the address was incorrect, the dwelling was unoccupied, the dwelling had been liquidated)
- 10. the household changed the place of residence and the new address could not be established
- 11. the interview was not conducted due to other reasons (e.g. all persons from the household moved to a multi-occupancy accommodation facility).

4. Collective information on the individual interviews (all household members aged at least 16 as of 1 March 2013 are to complete an individual interview)

- 4.1. Number of persons in the household to complete an individual interview
- 4.2. Number of conducted individual interviews
- 4.3. Number of individual questionnaires recognised as not filled in accordance with the instructions

5. Does the household consent to take part in the survey in the subsequent years?

(Choose one of the options given below and mark the appropriate box)

- 1 YES 2 v NO 3 HAS NOT DECIDED YET

I confirm that the information presented in the questionnaire was collected in accordance with the procedure under the survey.

date month year						Name of the interviewer	
				1	1		
Signature of the interviewer						Name of the person checking the form:	

C. HOUSEHOLD COMPOSITION

1. THE PERSON'S REFERENCE NUMBER¹		2. FIXED NUMBER²	NAME OF THE HOUSEHOLD MEMBER							
1										
2										
3										
4										
5										
6										
7										
8										
9	(additional sheet C)									
10	(additional sheet C)									
11	(additional sheet C)									
12	(additional sheet C)									
1	The person's reference number	1	2	3	4	5	6	7	8	
4	Relationship to the household head									
5	Family number									
6	Relationship to the family head									
7										
8	Date of birth	day								
		month								
9		year (two last digits)								
10	Gender 1 – man, 2 – woman									
11	Marital status if unmarried line 16									
12	Date of current marriage	month								
13		year (two last digits)								
14	Date of the breakdown of last marriage (divorce, death of the spouse)	month								
15		year (two last digits)								
16	Educational attainment (if 99 line 19)									
17	Years of education completed									
18	Specialisation of the completed education									

¹ For households surveyed in 2009, the same as in 2009, successive numbers for persons not on the list.

² Only for households surveyed in 2009; a number from the 6th column of the surveyed person's list; an empty space for persons not on the list.

1	Personal reference number	1	2	3	4	5	6	7	8
19	Educational status (5,8 line 22)								
20	Type of education service								
21									
22	Driving licence 1 YES, 2 NO; 8 – not applicable								
23	Command of foreign languages 1. active 2. passive 3. none	English							
24		German							
25		French							
26		Russian							
27		Spanish							
28		other							
29	Does he/she have a mobile phone? (1 YES with keys, 2 YES with touchscreen, 3 more than one and at least one with a touchscreen, 4 no mobile phone)								
30	Disability 1, 2, 3 31; others 32								
31	Disability certificate?								
32	Source of income	main							
33		additional							
34	Reasons for temporary absence concerning the persons who are temporarily absent from the household								
35	Being a household member or not								
36	Movement of persons in the household (only for the households interviewed previously)	date of arrival	month						
37			year (two last digits)						
38		date of leaving	month						
39			year (two last digits)						
40		reason for arrival							
41		reason for leaving							
42	Result of the individual interview								

43. Reference number of the persons answering the questions on behalf of the household

D. ECONOMIC ACTIVITY OF THE HOUSEHOLD MEMBERS AGED 15 AND ABOVE
(economic activity as defined in the Labour Force Survey (BAEL); **the person's reference number is the same as in part C**)

1	Reference number of the person (the same as in part C)						
2	During the last 7 days, has this person performed any paid work or helped without pay in the family business? <i>1 YES 4, 2 NO 3</i>						
3	During the last 7 days, has this person been an employee, a self-employed person or helped without pay in the family business but has temporarily not performed his/her work? <i>1 YES 5; 2 NO 8</i>						
4	How many hours has this person worked during the last 7 days?						
5	What is the type of work this person performs at his/her main job?						
6	Is this a full-time job? <i>1 YES 8; 2 NO 7</i>						
7	Why does this person work part-time?						
8	Is this person registered as an unemployed person in the Labour Office? <i>1 YES 9, 2 NO 10</i>						
9	Does this person receive the unemployment benefits? <i>1 YES, 2 NO</i>						
10	During the last 4 weeks, has this person been seeking a job or a different job? <i>1 YES (currently unemployed) 12; 2 YES (currently employed) or 5 NO (currently employed) 15; 3 NO (already found a job) 13; 4 NO (currently unemployed) 11</i>						
11	Why is this person not seeking a job?						
12	Is this person ready to start a job this or next week? <i>1 YES, 2 NO</i>						
13	For how long has this person been unemployed? <i>(applicable also to retirees and pensioners; in the case of persons who have never worked, enter 97 in the line "years")</i>	years					
14		months					
15	Ownership structure of the institution being the main workplace of the person <i>(in the case of currently employed persons)</i>						
16	Ownership structure of the institution being the additional workplace of the person <i>(in the case of currently employed persons)</i>						
17	Is the main workplace located in the city/town of residence? <i>(in the case of currently employed persons) 1 YES, 2 NO</i>						
18	Current profession						
19	Profession at the last job <i>(in the case of currently unemployed persons who worked in the past)</i>						
20	During the last 2 years, how many times has this person been registered in the Labour Office as an unemployed person?						
21	During the last 2 years, how long in total has this person been unemployed? <i>(in months)</i>						

1	Reference number of the person (the same as in part C)						
22	During the last 2 years, has this person participated in any activity related with gaining new professional qualifications or other skills? 1 YES, 2 NO – go to line 26						
23	Specify the type (<i>up to three types</i>) of educational activity						
24							
25							
26	Did this person work abroad in the period 2011-2013? 1 YES, 2 NO						
27	Did this person study abroad in the period 2011-2013? 1 YES, 2 NO (<i>if the answer “NO” is given to questions 26 and 27 – go to part E</i>)						
28	How many times did this person go abroad to work or study there in the period 2011-2013?						
29	In which countries did this person work or study? (<i>if in more than two, write those two in which the person spent most time</i>)						
30							
31	Provide the total time of working or studying abroad in the period 2011-2013 (<i>in months</i>).	Workin					
32		g Studyin					
33	If this person has returned after a stay abroad longer than 6 months in the period 2011-2013, then why? (<i>if this condition is not fulfilled, do not enter anything</i>)						

E. NUTRITION

I would like to ask you about meeting the nutritional needs in your household.

1. Can your household afford to buy a sufficient amount of the following food items?

Provide the answers for each of the following items separately, by crossing the appropriate box.

1.1. vegetables and vegetable preserves	1	YES	2	NO
1.2. fruit and fruit preserves	1	YES	2	NO
1.3. meat (including poultry)	1	YES	2	NO
1.4. meat and poultry products	1	YES	2	NO
1.5. fish and fish products	1	YES	2	NO
1.6. butter and other edible fats	1	YES	2	NO
1.7. milk	1	YES	2	NO
1.8. dairy products	1	YES	2	NO
1.9. sugar	1	YES	2	NO
1.10. confectionary (sweets, chocolate, etc.)	1	YES	2	NO
1.11. stimulants (coffee, tea, alcohol, tobacco)	1	YES	2	NO

2. In comparison with the situation two years ago, has the ability to meet the nutritional needs in your household:

Choose one of the options given below by crossing the appropriate box.

1. declined
2. improved
3. remained unchanged

F. HOUSEHOLD MATERIAL WEALTH

Now, I would like to ask you whether you possess certain goods and/or savings and whether you have taken out any banking services, credits or loans.

1. Does your household use the service of any bank? 1. YES 2. NO

If "yes" please go to question 4.

2. Why does the household **not use** the services of a bank? *Please show CARD no. 1 and request the choice of two answer variants and ticking of the appropriate square*

- 2.1. lack of trust in banks
- 2.2. too far to go to nearest bank or cash machine
- 2.3. lack of regular income/savings
- 2.4. bank services are too dear
- 2.5. loan application rejected
- 2.6. bank services are too complicated
- 2.7. no need for bank services
- 2.8. of other financial institutions (SKOK, Provident etc) are sufficient
- 2.9. lack of remote access to products/services (by internet, telephone)
- 2.10. other reasons

3. Does your household intend to start using bank services this year? 1. YES 2. NO

4. Has anyone in your household given up cooperation with a bank (not a branch, but any bank) in the last year? 1. YES 2. NO

If no resignations, please go to question 6.

5. What was the bank? (you can indicate more than one answer)

1. Alior Bank	11. Getin Bank
2. Bank Gospodarki ywno ciowej	12. ING Bank 1 ski
3. Bank Millennium	13. Kredyt Bank
4. Bank Pekao SA	14. mBank
5. Bank Pocztowy	15. MultiBank
6. bank spódzielczy	16. PKO Bank Polski
7. Bank Zachodni WBK	18. Polbank
8. Citi Handlowy	19. SKOK
9. Credit Agricole	20. another
10. Eurobank	

6. Does your household have any savings? 1. YES 2. NO

If the household has savings, go to question 2, if not – go to question 5.

7. What is the approximate total amount of your household savings?

Show CARD 2, ask to choose one of the options and cross the appropriate box.

- 1 up to the equivalent of the household's monthly income
- 2 above the equivalent of the household's monthly income – up to the equivalent of the household's 3-months' income
- 3 above the equivalent of the household's 3-months' income – up to the equivalent of the household's 6-months' income
- 4 above the equivalent of the household's 6-months' income – up to the equivalent of the household's yearly income
- 5 above the equivalent of the household's yearly to 3-year income
- 6 over 3-year household income
- 7 it is hard to say [NOT TO BE READ]

8. What is the form of your household savings?

Provide the answers for each of the following forms separately, by crossing the appropriate box.

8.1. bank deposits in PLN	1	YES	2	NO
8.2. bank deposits in foreign currencies	1	YES	2	NO
8.3. bonds	1	YES	2	NO
8.4. investment funds	1	YES	2	NO
8.5. Individual Pension Fund/ Pension Security	1	YES	2	NO
8.6. securities quoted on the stock exchange	1	YES	2	NO
8.7. shares and stocks in companies not listed on the stock exchange	1	YES	2	NO
8.8. investments in property	1	YES	2	NO
8.9. investments in material goods other than real property	1	YES	2	NO
8.10. cash	1	YES	2	NO
8.11. insurance policy	1	YES	2	NO
8.12. long-term savings programmes	1	YES	2	NO
8.13. other forms	1	YES	2	NO

9. What is the purpose of your household savings?

Provide the answers for each of the following purposes separately, by crossing the appropriate box.

9.1. reserves for everyday consumer needs (e.g. food, clothes)	1	YES	2	NO
9.2. regular fees (e.g. home payments)	1	YES	2	NO
9.3. purchase of consumer durables	1	YES	2	NO
9.4. purchase of a house or an apartment, payments to the housing cooperative	1	YES	2	NO
9.5. renovation of the house or apartment	1	YES	2	NO
9.6. medical treatment	1	YES	2	NO
9.7. medical rehabilitation	1	YES	2	NO
9.8. leisure	1	YES	2	NO
9.9. reserves for unexpected events	1	YES	2	NO
9.10. securing the children's future	1	YES	2	NO
9.11. security for the old age	1	YES	2	NO
9.12. to develop one's own business	1	YES	2	NO
9.13. other purposes	1	YES	2	NO
9.14. no special purpose	1	YES	2	NO

10. Does your household have any loans or credits to repay? 1 YES 2 NO

If the household has loans or credits to repay, go to question 11, if not – go to question 17.

11. Where did your household take out the loans or credits?

Provide the answers for each of the following sources of loans or credits separately, by crossing the appropriate box.

11.1. banks	1	YES	2	NO
11.2. SKOK	1	YES	2	NO
11.3. from credit agencies (agiel), shops	1	YES	2	NO
11.4. other companies providing loans (Provident, SMS loans, etc)	1	YES	2	NO
11.5 from private persons	1	YES	2	NO

12. In which currency do you borrow? (please indicate all the currencies in which you have loans)

1. in PLN
2. in Euro
3. in Swiss Franks
4. in other currencies

13. What is the total amount of your household's debt (value of all loans, debts and borrowings) outstanding?

Show CARD no. 2, ask to choose one of the options and cross the appropriate box.

1	up to the amount of the household's monthly income
2	above the equivalent of the household's monthly income – up to the equivalent of the household's 3-months' income
3	above the equivalent of the household's 3-months' income – up to the equivalent of the household's 6-months' income
4	above the equivalent of the household's 6-months' income – up to the equivalent of the household's yearly income
5	above the equivalent of the household's yearly – up to 3-year income
6	over 3-years household income
7	it is hard to say

14. How much of your average monthly income have you devoted to servicing your borrowings in the last 3 months?

1. less than 10%
2. between 10% and 20%
3. between 20% and 30%
4. between 30% and 40%
5. between 40% and 50%
6. over 50%

15. How long do you have left before you repay your current borrowings?

1. less than one year
2. at least one year (please fill in the number of years)

16. What was the purpose of the loans or credits taken out by your household?

Provide the answers for each of the following purposes separately, by crossing the appropriate box.

16.1. everyday consumer needs (e.g. food, clothes, footwear) 1 YES 2 NO

16.2. regular payments (e.g. home payments) 1 YES 2 NO

16.3. purchase of consumer durables 1 YES 2 NO

16.4. purchase of a house or an apartment, payments to the housing cooperative

1 YES 2 NO

16.5. renovation of the house or apartment 1 YES 2 NO

16.6. medical treatment 1 YES 2 NO

16.7. purchase or lease of the tools necessary for work (machines, lease of a facility, etc.)

1 YES 2 NO

16.8. leisure 1 YES 2 NO

16.9. purchase of securities 1 YES 2 NO

16.10. repayment of earlier debts 1 YES 2 NO

16.11. developing own business 1 YES 2 NO

16.12. own education 1 YES 2 NO

16.13. children's education 1 YES 2 NO

16.14. children's future 1 YES 2 NO

16.15. other purposes 1 YES 2 NO

17. Has your household's material situation, in the last two years,

- 1 worsened
- 2 improved
- 3 remained unchanged

18. Does your household or any of its members possess the following goods? It does not matter whether such goods are owned, leased or made available in any other manner (provide the answers in the column "Does the household possess?"). If the household does not possess a specific item, please specify (provide the answer in the column "If not, is it due to financial reasons?") whether this is due to financial reasons (answer "YES") or any other reasons, for example such item is redundant (answer "NO"). In the case of three lines (desktop computer, portable computer, car), enter the number in the column "How many items?".

4. How is your dwelling heated?

Choose one of the options given below by crossing the appropriate box.

- 1 collective central heating
- 2 individual central heating (using gas, coal, coke, electricity, other fuel)
- 3 fuel-fired furnaces (using coal, wood, sawdust, etc.)
- 4 other

5. Does your household have currently any overdue:

Provide the answers for each of the following payments/bills, by crossing the appropriate box.

Options: 1 – yes, for 1 month; 2 – yes, for 2 months; 3 – yes, for 3 months; 4 – yes, for 4-6 months; 5 – yes, for 7-12 months; 6 – yes, for more than 12 months; 7 – no; 8 – not applicable.

5.1. payments for the dwelling (rent)	1	2	3	4	5	6	7	8
5.2. gas or electricity bills	1	2	3	4	5	6	7	8
5.3. repayment of the home loan	1	2	3	4	5	6	7	8

6. In comparison with the situation two years ago, have the housing conditions of your household:

Choose one of the options given below by crossing the appropriate box.

- 1 improved
- 2 deteriorated
- 3 remained unchanged.

H. EDUCATION

Now I would like to ask you about the education of your children.

NOTE: QUESTIONS 1-5 CONCERN ONLY THE HOUSEHOLDS WITH CHILDREN AGED UP TO 26

1., 2. What level of education would you like your children to attain?

(For each child choose one of the levels of education given below, by entering the appropriate number in the box in the column "level of education" (show Card 3)).

level of education:

- 1 basic vocational school
- 2 profiled secondary school
- 3 technical or vocational secondary school
- 4 higher education (Bachelor's degree)
- 5 higher education (Master's degree)

(Enter the answers in line 2 in the table below.)

3., 4. Does your child use the computer and Internet at home? (show CARD 4)

- 1 Yes, but only under supervision of other household members
- 2 Yes, he/she uses them on his/her own
- 3 No, he/she cannot use them due to an illness
- 4 No, he/she does not know how to use the computer/Internet
- 5 No, although he/she knows how to do it, there is no computer/Internet access at home
- 6 No, he/she is too young for it

(Enter the answers in lines 3 and 4 in the table below.)

1. Child's number*	1.1	2.1	3.1	4.1	5.1
2. Level of education	1.2	2.2	3.2	4.2	5.2
3. Computer use	1.3	2.3	3.3	4.3	5.3
4. Internet use	1.4	2.4	3.4	4.4	5.4

* The child's number is the same as the reference number assigned to this person in part C, line 1.

NOTE: QUESTIONS 5 and 6 CONCERN ONLY THE HOUSEHOLDS WITH CHILDREN AT SCHOOL AGE (above the reception class)

5. During the current school year, have you – due to financial reasons – had to:

Provide the answers for each of the following decisions separately, by crossing the appropriate box.

5.1. decide not to enrol the child on extra-curricular classes?	1	YES	2	NO
5.2. limit or suspend the payment of school fees?	1	YES	2	NO
5.3. stop paying for the child's meals at school?	1	YES	2	NO
5.4. withdraw the child from any private lessons?	1	YES	2	NO
5.5. change the school for one with lower or no fees?	1	YES	2	NO
5.6. introduce other restrictions?	1	YES	2	NO

6. In comparison with the situation two years ago, has your household's ability to meet the needs connected with the education of your children:

Choose one of the options given below by crossing the appropriate box.

- 1 declined
- 2 improved
- 3 remained unchanged.

I. SOCIAL ASSISTANCE

Now I would like to ask you about any assistance your household receives.

1. Does your household receive any external assistance? 1. YES 2.v NO

If the household receives assistance, go to question 2, if not – go to Section J "Culture and Leisure".

2. What is the form of assistance your household receives?

Provide the answers for each of the following forms of assistance separately, by crossing the appropriate box.

2.1. financial	1	YES	2	NO
2.2. in the form of goods	1	YES	2	NO
2.3. in the form of services	1	YES	2	NO

J. CULTURE AND LEISURE

Now I would like to ask you about the matters connected with culture and leisure.

1. In the last year, has any of the members of your household been unable to afford: (*The answer DOES NOT APPLY means lack of the given need*)

1.1. cinema	1.	YES	2.	NO	3.	NOT APPLICABLE
1.2. theatre, opera, operetta, philharmonic concert, other concert	1.	YES	2.	NO	3.	NOT APPLICABLE
1.3. museum or exhibition	1.	YES	2.	NO	3.	NOT APPLICABLE
1.4. purchase of a book	1.	YES	2.	NO	3.	NOT APPLICABLE
1.5. purchase of press (daily newspapers, weeklies, monthlies)	1.	YES	2.	NO	3.	NOT APPLICABLE

2. How many books (approximately) are there at your home (excluding school books and manuals; also in the electronic version)?

- 1 none
- 2 up to 25 volumes
- 3 26-50 volumes
- 4 51-100 volumes
- 5 101-500 volumes
- 6 more than 500 volumes

3. If, in question 2, you answer different than 1: Have you purchased any books in the last year other than school text-books or instruction (paper or electronic version) 1 YES, how many 2 NO

4. Is there any musical instrument (piano, guitar, other) in your household? 1 YES 2 NO

5. – if YES, does any of the household members play it? 1 YES 2 NO

6. In comparison with the situation two years ago, has your household's ability to meet the needs connected with culture:

Choose one of the options given below by crossing the appropriate box.

- 1 declined
- 2 improved
- 3 remained unchanged

7. In the last year, have you (any adult or child) been unable to afford: (*The answer DOES NOT APPLY means lack of the given need*)

7.1. summer camp or other group trips for (minor) children

1 YES 2 NO, the children have participated 3 NOT APPLICABLE

7.2. holiday leave, trips for adults

1 YES 2 NO, the adults have participated 3 NOT APPLICABLE

7.3. family trips (adults and minor children)

1 YES 2 NO, the family has participated 3 NOT APPLICABLE

8. In comparison with the situation two years ago, has your household's ability to meet the needs connected with leisure:

Choose one of the options given below by crossing the appropriate box.

- 1 declined
- 2 improved
- 3 remained unchanged.

K. HEALTHCARE

Now I would like to ask you about the matters connected with health.

1. In the last year, has any member of your household used the services of:

1.1. healthcare units providing services financed by the National Health Fund 1. YES 2. NO

1.2. healthcare units providing services paid for by the patient 1. YES 2. NO

1.3. healthcare units providing services paid for by the employer (under a medical services plan or health insurance) 1. YES 2. NO

2. In the last year, has any member of your household been hospitalised: (for reasons other than pregnancy)?

1. YES reference number of the person(s) from part C
2. NO

If the answers to both question 1 and 2 are NO, go to question 4.

3. During the last 3 months, how much in total (in PLN) has the household spent on:
- 3.1. medical treatment or various medical tests in the clinics where the services were officially paid for (including also non-standard services provided by dentists and orthodontists, orthopaedic equipment, also when at least partially financed by the National Health Fund, etc.) PLN
- 3.2. informal payments, the so-called “gifts of gratitude”, meant to secure a better or quicker care PLN
- 3.3. gifts being tokens of real gratitude for the received care PLN
- 3.4. fees in a public hospital (e.g. gifts, fees for the night care, anaesthesia, purchase of medicines in the pharmacy for an in-patient, etc.) PLN
4. Please state the total amount of expenditures incurred in the last 3 months on medicines and other pharmaceutical items connected with any illness in your household: PLN

5. **In the last year**, has your household experienced any of the following situations?

Provide the answers for each of the following situations separately, by crossing the appropriate box.

5.1. there has not been enough money to buy a prescribed or recommended medicine

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

5.2. you have not been able to afford to treat your teeth

1 YES 2 NO 3 NO SUCH NEEDS HAVE OCCURRED

5.3. you have not been able to afford dental prostheses

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

5.4. you have not been able to afford to visit a doctor

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

5.5. you have not been able to afford medical tests (such as laboratory tests, X-ray examination, electrocardiography)

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

5.6. you have not been able to afford to undergo a rehabilitation treatment

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

5.7. you have not been able to afford a stay at a sanatorium

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

5.8. you have not been able to afford hospital treatment

1 YES 2 NO 3 NO SUCH NEED HAS OCCURRED

6. If an additional health insurance policy guaranteed an improved access to medical services and their higher quality, would your household be willing to buy such an insurance policy?

1 NO

2 YES, up to PLN 100 monthly

3 YES, also above PLN 100 monthly

7. In comparison with the situation two years ago, has the ability of your household to meet the health needs:

Choose one of the options given below by crossing the appropriate box.

1 declined

2 improved

3 remained unchanged

L. INCOME SITUATION AND INCOME MANAGEMENT

Now I would like to ask you about your household's financial situation and income. Please take into account the income earned by all persons from your household (from any source), which to any extent is added to the common budget.

1. What was the net income (in PLN) of your household last month?
in the case of refusal to answer, please specify the range (show Card 5)
2. What was the average monthly net income (in PLN) of your household in 2012? in the case of refusal to answer – please specify the range (show Card 5)
3. Is your household able to make ends meet with the current net income (cash in hand)?
Choose one of the options given below by crossing the appropriate box.
 - 1 with great difficulty
 - 2 with difficulty
 - 3 with some difficulty
 - 4 rather easily
 - 5 easily
4. What is the lowest monthly net income (in PLN) needed to make ends meet for your household?
PLN
5. Which of the following statements characterises best the income management in your household?
Show CARD 6, ask to choose one of the options and cross the appropriate box.
 - 1 we can afford everything and make savings for the future
 - 2 we can afford everything without any particular problems but we do not make savings for the future
 - 3 we live thriftily and thus can afford everything
 - 4 we live very thriftily in order to save money for important purchases
 - 5 we can afford only the cheapest food, clothes and rent, and (if the household is in debt) – for the loan repayment
 - 6 we can afford the cheapest food, clothes and rent but we have no money to repay the loan
 - 7 we can afford the cheapest food and clothes but we have no money to pay the rent
 - 8 we can afford the cheapest food but we have no money to buy clothes
 - 9 we cannot afford even the cheapest food
6. Does the regular income of your household allow you to meet the everyday needs?
1. YES 2. NO

If the regular income of the household allows to meet the everyday needs, go to question 7, if not – go to question 8.

7. What does your household do to meet the everyday needs?
Provide the answers for each of the following solutions, by crossing the appropriate box.

7.1. uses the savings	1. YES 2. NO
7.2. sells or pawns its property (material goods)	1. YES 2. NO
7.3. limits the everyday needs	1. YES 2. NO
7.4 takes out loans and credits	1. YES 2. NO
7.5. uses the assistance of relatives	1. YES 2. NO
7.6. uses the assistance of the Church/Caritas	1. YES 2. NO
7.7. applies for social assistance	1. YES 2. NO
7.8. a household member takes up an additional job	1. YES 2. NO
7.9. other actions	1. YES 2. NO
7.10. does not take any actions	1. YES 2. NO

8. How does your household pay regular telephone, television or electricity bills (or all other bills with a fixed amount)?

Mark all methods used.

- 8.1. via direct debit through the bank account
- 8.2. via an online bank account
- 8.3. via a bank account at a bank unit
- 8.4. at the post office
- 8.5. at a cash register where bills can be paid (e.g. at the supermarket)
- 8.6. directly at the provider's customer service point
- 8.7. by other method
- 8.8. no such bills are paid

If the household does not use direct debit, answer 8.1 should not be marked question 9, if not, question 10

9. Why does the household not use the direct debit service to pay its bills?

If the household has a bank account, show CARD 7, ask to choose one of the options and cross the appropriate box.

- 9.1. we do not have bank account
- 9.2. current way is most convenient
- 9.3. we pay our bills when we have the funds - direct debit would be problematic
- 9.4. we pay a small amount of bills and we do not want to set up that kind of service
- 9.5. we didn't know of any such service
- 9.6. we do not know how to set up such a service
- 9.7. activation of such a service is too complicated
- 9.8. it is too expensive
- 9.9. we do not trust that the payment will be made on time
- 9.10. we fear loss of control over our finances
- 9.11. we fear that the invoice may be issued to an incorrect amount
- 9.12. invoice issuers do not give us the option of direct debit

10. In comparison with the situation two years ago, has the income situation of your household:

Choose one of the options given below by crossing the appropriate box.

- 1** worsened.....
- 2** improved
- 3** remained unchanged

M. COMPUTER AND INTERNET

Now I would like to ask you about the matters connected with the Internet.

Questions 1 and 2 are asked to the households with a computer and Internet access (answer "YES" to question F. 18.14)

1. How do the members of your household connect to the Internet at home? *Show CARD 8, more than one answer may be checked, by crossing the appropriate boxes.*

- 1.1. dial-up access (the telephone and Internet cannot be used at the same time)
- 1.2. permanent connection via a landline phone operator
- 1.3. permanent connection through a cable TV provider
- 1.4. other types of permanent connection, such as a local area network, local provider or shared connection in the neighbourhood
- 1.5. permanent connection through a mobile network, such as Orange Free, Blueconnect, iPlus, Play Online
- 1.6. access through a mobile phone (modem in the mobile phone)
- 1.7. other

2. If there is a permanent connection in the household, what is its speed? *Mb/s read as megabytes per second. If the speed varies depending on the time of day, ask about the maximum speed stated in the contract with the provider.*

- | | | | |
|---|--------------|---|-------------------|
| 1 | up to 1Mb/s | 5 | 20 to 29Mb/s |
| 2 | 2 to 6 Mb/s | 6 | 30 to 59Mb/s |
| 3 | 7 to 10Mb/s | 7 | over 60Mb/s |
| 4 | 11 to 19Mb/s | 8 | it is hard to say |

Question 3 is asked to the households without Internet access (answer “NO” to question F.18.14.)

3. Why is there no Internet access in your household? Show CARD 9, up to 3 answers may be checked, by crossing the appropriate boxes.

1. no appropriate equipment
2. no technical possibility of using a permanent Internet connection
3. sufficient possibility of using the Internet elsewhere
4. we do not need the Internet
5. there is nothing interesting on the Internet
6. privacy and security reasons
7. the Internet may be harmful, it may deprave the children, consume time
8. the costs of access are too high
9. no appropriate skills to use the Internet
10. other reasons
11. we plan to set up the access this year

THANK YOU FOR YOUR TIME.

1.2. Individual questionnaire

Subsequent number of the questionnaire in the Voivodeship **fixed personal number** (only for previously studied respondents, to be copied from PART 1/C)

COUNCIL FOR SOCIAL MONITORING

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SOCIAL DIAGNOSIS 2013

An independent survey of the conditions and quality of life in Poland

PART II, individual

FEMALE

2

Identification number of the household (*as in Part I/A*)

Reference number of the person (to be copied from Part I/C)

Name (to be copied from Part I/C)

People differ between each other. They live in various conditions, they react to everyday events in a different manner, and they have varied ways to deal with what life brings.

This questionnaire concerns your personal perception of your own life. The majority of questions should be interesting for you, some of them may seem boring and tiresome but many will be easy to answer – after all it is your life they concern; although some of them may prove to be difficult as well. Please answer them the best way you can.

Sometimes you may have the impression that certain topics reappear and the same questions are asked, only in a changed manner. And you will be right. We are searching for the best way to ask questions. Do not be surprised if we jump from topic to topic – the questions in the sets have been listed randomly. You may be sure your answers will remain confidential. All answers will be used only for scientific purposes as part of collective statistical analyses.

In the case of some questions various possible answers may be given to choose from. Please mark the one which describes your situation best. In some cases more than one answer can be checked. If the question has no ready answers to choose from, please enter the appropriate information in the indicated space.

We kindly ask you to fill in this questionnaire on your own, without any help from other family members. We would like to learn about your individual assessments and feelings and not the opinions discussed with other persons. If you have any problems with answering any of the questions, please ask the interviewer for help.

INSTRUCTION

In the questions where one or more answers may be selected please mark your choice by crossing the appropriate box, in the following manner: .

In the questions where your assessment should be given, please enter the digit matching your assessment in the box. If the scale of assessment for such questions looks as the one below

1	2	3	4	5	6	7
completely						very
not important						important

Then the intermediate numbers (2, 3, 4, 5, 6) mean that the lower the number, the less important a given issue is (2 is less important than 3) and the greater the number, the more important the issue is (6 more important than 5).

In questions which a numerical value should be provided, please put it in the correct squares, making sure that the last digit is in the last square, for example: if a number of friends is 12

1	2
---	---

, and if it is 5

	5
--	---

 .

1. Your **date of birth**

day month year

2. What in your opinion is **the most important condition of a successful, happy life** (*PLEASE FIRST READ THROUGH ALL THE ANSWERS AND THEN CHOOSE NO MORE THAN THREE, by crossing the appropriate boxes*):

- 1 MONEY
- 2 CHILDREN
- 3 SUCCESSFUL MARRIAGE
- 4 WORK
- 5 FRIENDS
- 6 PROVIDENCE, GOD
- 7 CHEERFULNESS, OPTIMISM
- 8 HONESTY
- 9 KINDNESS AND BEING RESPECTED
- 10 FREEDOM
- 11 GOOD HEALTH
- 12 EDUCATION
- 13 STRONG PERSONALITY
- 14 OTHER

3. **How do you perceive your entire life? Could you say it was...** (*please cross the appropriate box*)

- 1 DELIGHTED
- 2 PLEASED
- 3 MOSTLY SATISFYING
- 4 MIXED
- 5 MOSTLY DISSATISFYING
- 6 UNHAPPY
- 7 TERRIBLE

In the recent months: ("NOT APPLICABLE" means unmarried)

4. Your husband's expectations towards you have been so high you have not been able to meet them

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

5. Your husband has spent your shared money in a careless manner

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

6. Your husband's problems have worried you and made your life harder

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

In the recent months: ("NOT APPLICABLE" means no financially dependent children)

7. You have had to listen to some complaints concerning you child/children (e.g. at school, from neighbours or other parents)

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

8. You have incurred some financial costs as a result of your child/children's behaviour

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

9. Your child/children has disregarded you and your help and advice and instructions

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

10. You have felt you are losing control over your child/children

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

11. You have spent too little time with your child

- 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE

In the last months: (DOES NOT APPLY means a lack of elderly parents, parents-in-law, or relatives)
11. Did you feel responsible for ensuring the care and well-being of elderly relatives 1 OFTEN 2 SOMETIMES 3 NEVER 4 DOES NOT APPLY
12. The state of health or mental state of an elderly relative concerns me. 1 OFTEN 2 SOMETIMES 3 NEVER 4 DOES NOT APPLY
In the recent months:
13. You have felt your source of income is uncertain and unstable 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE (no income)
14. Your financial problems have worried you and made your life harder 1 OFTEN 2 ONCE OR TWICE 3 NEVER
In the recent months: (“NOT APPLICABLE” means no paid job)
15. You have felt your work is too tiresome, dirty or dangerous 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE
16. You have felt overburdened with work duties which you have been unable to cope with 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE
17. You have been unfairly treated by others at work 1 OFTEN 2 ONCE OR TWICE 3 NEVER 4 NOT APPLICABLE
In the recent months:
18. You have felt that the place you live in is too crowded, for instance, that there are too many persons living in your apartment, the neighbouring apartments or in the entire building 1 OFTEN 2 ONCE OR TWICE 3 NEVER
19. You have feared because of crime, drug addiction and hooliganism in your district, housing estate or neighbourhood 1 OFTEN 2 ONCE OR TWICE 3 NEVER
20. The problems connected with your neighbours or other persons in the neighbourhood have poisoned your life 1 OFTEN 2 ONCE OR TWICE 3 NEVER
21. You have been annoyed with the decisions and actions taken by the local authorities 1 OFTEN 2 ONCE OR TWICE 3 NEVER
In the recent months:
22. You have suffered from ailments, such as bones aching or shortness of breath, etc., which has made it difficult for you to leave home, climb the stairs, etc. 1 OFTEN 2 ONCE OR TWICE 3 NEVER
23. Your health problems have made it difficult for you to perform everyday activities or to take part in other activities 1 OFTEN 2 ONCE OR TWICE 3 NEVER

In the recent months:			
24. You have dealt with some administrative matter			
1	YES	2	NO (if the answer is "NO", go to question 28)
25. You have been unable to deal with an administrative matter in an efficient, quick and easy manner			
1	OFTEN	2	ONCE OR TWICE
		3	NEVER
26. You have had to use connections or other ways to deal with some formal matter			
1	OFTEN	2	SOMETIMES
		3	NEVER
27. You have felt entirely helpless and humiliated while dealing with some formal matter			
1	OFTEN	2	SOMETIMES
		3	NEVER
28 Did you vote in the last parliamentary elections in 2011? 1 YES 2 NO 3 I was too young to vote			
29. What, in your opinion, is most important in life?			
1. fun, well-being, lack of stress			
2. sense of purpose, achieving important goals despite difficulties, pain and sacrifice			
In the last year, have you...?			
30. started a better paid or an additional job 1 YES 2 NO			
31. invested any money in production, trade or services 1 YES 2 NO			
32. earned money in connection with the stocks, bonds or participation units in some fund			
	1	YES	2 NO
33. gained new qualifications or skills in order to have a higher salary			
	1	YES	2 NO
34. Considering all, how would you assess your life in the recent times – would you say you are...:			
	1	VERY HAPPY	
	2	RATHER HAPPY	
	3	RATHER UNHAPPY	
	4	UNHAPPY	
35. In the last year, have you used the services of healthcare units?			
35.1. financed by the National Health Fund 1 YES 2 NO			
35.2. paid for from own pocket 1 YES 2 NO			
35.3. paid for by the employer (under a medical services plan or health insurance)			
	1	YES	2 NO
36. In the recent months, how often have you been so depressed you have thought about suicide?			
	1	VERY OFTEN	
	2	RATHER OFTEN	
	3	RARELY	
	4	NEVER	
37. Do you feel loved and trusted? 1 YES 2 NO			

38. **On average, how often in a month do you take part in a church service or other religious meetings?** (if less often than once in a month, please enter 0)
times a month

39. **How many persons do you consider to be your friends?**

40. **At present, how strong is your willingness to live?** (please cross the appropriate box on the scale below)

1	2	3	4	5	6	7	8	9	10
I do not want to live at all								I want to live very strong	

41. **Do you feel lonely, though you would prefer not to?** 1 YES 2 NO

42. **In your opinion, were the reforms in Poland after 1989 in general successful or unsuccessful?**

- 1 successful
- 2 unsuccessful
- 3 it is hard to say

43. **Do you smoke?** 1 YES 2 NO

44. — if YES, **how many cigarettes a day do you smoke on average?** cigarettes

45. — if NO, **have you ever smoked?** 1 YES 2 NO

46. **During the last two years, have you been involved in any actions for the benefit of your local community** (gmina, housing estate, town or neighbourhood)?

1 ⊃ YES 2 ⊃ NO

47. Please specify, **how you usually react to problems or difficult situations in your life.** (more than one answer may be checked, by crossing the appropriate boxes)

- 47.1. I seek advice and help from others
- 47.2. I pull myself together and start to act
- 47.3. I drink alcohol
- 47.4. I console myself that it could have been worse or that other have worse problems
- 47.5. I give up, I do not know what to do
- 47.6. I take tranquilisers
- 47.7. I pray to God for help
- 47.8. I do other things that help me forget about my problems and put me in a better mood

48. **Are you a member of any organisations, associations, parties, committees, councils, religious groups or clubs?**

- 1 YES, one
- 2 YES, two
- 3 YES, three or more
- 4 NO

49. — if YES, **have you ever fulfilled any roles in such organisations?** 1 YES 2 NO

50 - if question 48 is **YES**, then **do you currently take active part in such organisations?**

1 YES 2 NO

51 – if question 51 is **YES**, then what kind of organisation is it? (please indicate all **you take active part in**)

- 51.1 sports club
- 51.2 business, profesional or agricultural organisation
- 51.3 political party
- 51.4 an organisation supporting entrepreneurs, acting to protect the weak or human rights
- 51.5 trade union
- 51.6 union or interest club (anglers' stamp-collectors' motorists')
- 51.7 residents' association
- 51.8 parents' association
- 51.9 environmental protection, animal rights or nature reserve organisation
- 51.10 consumers' organisation
- 51.11 social club- youth, elderly, women, common interest
- 51.12 church or religious organisation
- 51.13 educational organisation (e.g Uniwersytet Trzeciego Wieku, book club)
- 51.14 elected local authority (e.g local or regional council)
- 51.15 support group
- 51.16 other, not mentioned above

In the boxes separated with horizontal lines below (N, O, P, etc.) there are various categories of feelings and behaviours. Read the four statements in each point carefully and then choose one that describes best your feelings and beliefs during the last month.

Please mark your choice by crossing the appropriate box (next to 0, 1, 2 or 3).

- N. 0. I think that I don't look worse than I used to
 1. I am worried because I think I look old and I am not attractive
 2. I feel that I look worse than I used to

3. I am sure that I look terrible.

- O. 0. I have as much energy as ever to work.
 1. I have less energy than I used to have.
 2. I don't have enough energy to do much.

3. I don't have enough energy to do anything.

- P. 0. I have not experienced any change in my sleeping pattern.
 1. I do not sleep as well as I used to.
 2. In the morning, I wake up 1-2 hours earlier and find it difficult to fall asleep again.

3. I wake up several hours too early and I can't get back to sleep.

- Q. 0. I am no more tired or fatigued than usual.
 1. I get tired or fatigued more easily than usual.
 2. I am too tired or fatigued to do a lot of things I used to do.

3. I am too tired or fatigued to do most of the things I used to do.

- R. 0. I have not experienced any change in my appetite.
 1. My appetite is somewhat less than usual.
 2. My appetite is much less than before.

3. I have no appetite at all.

- T. 0. I am not worried about my health any more than I used to be.
 1. I am worried about such ailments as: stomach pains, upset stomach, or constipation.
 2. I am very worried about my health; I think about it constantly.

3. My health condition is so worrying that I cannot think of anything else.

- U. 0. I haven't noticed any recent change in my interest in sex.
 1. I am less interested in sex than I used to be.
 2. I am much less interested in sex now.

3. I have lost interest in sex completely.

53. Have you attended any public meeting in the last year (but not at your workplace)?

1 YES 2 NO

54. Below you will find several statements. Please specify to what extent these statements match your beliefs and attitudes. Provide your opinions by entering the selected digit in the appropriate box.

The specific digits mean:

- 1 - DEFINITELY YES
- 2 - YES
- 3 - RATHER YES
- 4 - NEITHER YES NOR NOT
- 5 - RATHER NOT
- 6 - NO
- 7 - DEFINITELY NOT

- 54.1. I admire people who have expensive houses, cars and clothes.
- 54.2. Despite some painful experiences, my life has sense and a great value.
- 54.3. In life the most important thing is to have a lot of fun.
- 54.4. The measure of a successful life is the possession of various material goods.
- 54.5. I like buying things that have no practical purpose.
- 54.6. Shopping itself gives me a lot of joy.
- 54.7. There is nothing wrong in housing one's parents in a old person's home.
- 54.8. People above all try to help others.
- 54.9. Homosexuals should be allowed to live according to their beliefs.
- 54.10. A true patriot should not speak ill of Poland and the Polish people.
- 54.11. Children ought to help their elderly parents.
- 54.12. In our country foreigners have too much say.
- 54.13. Some people are just more worthy than others
- 54.14. I would like to look good and attractive.
- 54.15. Material goods are very important to me.
- 54.16. We should do our best to treat people equally.
- 54.17. Some groups of persons are not worthy of respect.
- 54.18. We should seek to make the income of all persons more or less equal.
- 54.19. You cannot raise children well without corporal punishment.
- 54.20. Every man is the architect of his own fortune.
- 54.21. The elderly are respected in Poland.
- 54.22. Parents should take advantage of parental leave more often and take care of their children.

55. Generally, do you believe that you can trust most people, or do you think you can never be too careful?

- 1 you can trust most people
- 2 you can never be too careful
- 3 difficult to say

56. Have you in the last year done any voluntary work for people outside the family or for a social organisation?

1 YES, OFTEN 2 YES, RARELY 3 NO

57. Considering all, do you think the last year was a good one for you?

1 YES 2 NO

58. On what or on who would depend, in your opinion, the last year being either a success or a failure? (you can indicate more than one answer)

- 58.1. authorities
- 58.2. myself
- 58.3. other people
- 58.4. fate (providence)

59. Below you will find a list of some ailments. Please specify whether you suffered from them LAST MONTH.

If you did not suffer from a particular ailment last month, please cross the box in the column "I did not". If you suffered from a particular ailment for less than half of the month, cross the box in the middle column. If you suffered from a particular ailment for at least half of the month, please cross the box in the last column.

IN THE PAST MONTH: I did not suffer I suffered less than 15 days I suffered at least for one half of the month

59.1. strong headaches	1	2	3
59.2. stomach pains or flatulence	1	2	3
59.3. pain or tension in the neck or arm muscles	1	2	3
59.4. chest or heart pains	1	2	3
59.5. dry mouth or throat	1	2	3
59.6. attacks of excessive sweating	1	2	3
59.7. shortness of breath	1	2	3
59.8. shortness of breath	1	2	3
59.9. accelerated heartbeat (palpitation)	1	2	3
59.10. shivers or convulsions	1	2	3
59.11. pressure on the bladder and more frequent urinating	1	2	3
59.12. a feeling tiredness not associated with work	1	2	3
59.13. constipation	1	2	3
59.14. nosebleeds	1	2	3
59.15. sudden changes of blood pressure	1	2	3

60. How tall are you? (cm)

61. What is your weight? (kg)

62. Please assess the specific areas of your life and state to what extent you are satisfied with them. Please give your answers by crossing the box next to the appropriate digit for the given area of life. The specific digits mean:

- 1 – VERY SATISFIED
- 2 – SATISFIED
- 3 – RATHER SATISFIED
- 4 – RATHER NOT SATISFIED
- 5 – NOT SATISFIED
- 6 – VERY NOT SATISFIED
- 7 – not applicable

To what extent are you satisfied with:

62.1. your relations with your close family members	1	2	3	4	5	6	7
62.2. the financial situation of your family	1	2	3	4	5	6	7
62.3. your relations with friends (a group of friends)	1	2	3	4	5	6	7
62.4. your health condition	1	2	3	4	5	6	7
62.5. your life achievements	1	2	3	4	5	6	7
62.6. the situation in the country	1	2	3	4	5	6	7
62.7. your housing conditions	1	2	3	4	5	6	7
62.8. the town/city you live in	1	2	3	4	5	6	7

62.9. your future prospects	1	2	3	4	5	6	7
62.10. your sexual life	1	2	3	4	5	6	7
62.11. your education	1	2	3	4	5	6	7
62.12. the manner in which you spend your free time	1	2	3	4	5	6	7
62.13. your work	1	2	3	4	5	6	7
62.14. children	1	2	3	4	5	6	7
62.15. marriage	1	2	3	4	5	6	7
62.16. safety in your town/city of residence	1	2	3	4	5	6	7

63. With which of the following statements on democracy do you agree most?

- 1 democracy is a superior form of governance
- 2 sometimes non-democratic rule is better than democracy
- 3 it does not really matter whether the government is democratic or not
- 4 democracy is a bad form of government
- 5 it is hard to say

64. During the last three months, your own (personal) monthly net income (less taxes) has on average amounted to:

PLN

65. What monthly net income (less taxes) do you expect to receive in two years?

PLN

66. Below you will find a list of various behaviours. Some of them may concern you directly, others may concern only other people. Please specify your attitude towards the behaviours listed below.

Mark the answers by entering the appropriate number (1-5) into the boxes next to each example. The specific digits mean:

- 1 - I DO NOT CARE AT ALL
- 2 - I CARE LITTLE ABOUT IT
- 3 - I CARE ABOUT IT TO SOME EXTENT
- 4 - I CARE ABOUT IT VERY MUCH
- 5 - IT IS HARD TO SAY

Do you care if:

- 66.1. someone pays lower taxes than he/she should
- 66.2. someone avoids paying the fares for the public transport (e.g. buses, trains)
- 66.3. someone unjustly draws unemployment benefit
- 66.4. someone unjustly receives disability benefits (on the grounds of being unable to work)
- 66.5. someone files an insurance claim under false pretences

67. We would like to know how many persons you contact with regularly for social and personal reasons (at least several times a year). Please give the approximate number of such persons:

- 67.1. among close family members
- 67.2. among friends
- 67.3. among acquaintances (work/school colleagues, neighbours and others)

68. How many of them live in the same town/city or within 10 km from you?

69. In the last week, how much time on average have you spent daily watching TV?

- 1 I do not watch TV
- 2 less than an hour
- 3 one to two hours
- 4 two to three hours
- 5 three to four hours
- 6 more than four hours

70. In the last month, how many times have you gone to:

70.1. cinema, theatre, concert

70.2. restaurant, cafe, pub

70.3. meeting with friends

IN THE LAST YEAR, have you:						
71. visited a psychologist (psychiatrist)	1	YES	2	NO		
72. drunk too much alcohol	1	YES	2	NO		
73. tried drugs/designer drugs	1	YES	2	NO		
74. lost a close person	1	YES	2	NO		
75. been unable to find a job after graduation	1	YES	2	NO	3	NOT APPLICABLE
76. been moved to a lower position at work	1	YES	2	NO	3	NOT APPLICABLE
77. been omitted in promotions at work	1	YES	2	NO	3	NOT APPLICABLE
78. been promoted at work	1	YES	2	NO	3	NOT APPLICABLE
79. had serious problems with your superior	1	YES	2	NO	3	NOT APPLICABLE
80. started your own business	1	YES	2	NO		
81. lost a lot of money doing business	1	YES	2	NO	3	NOT APPLICABLE
82. been robbed	1	YES	2	NO		
83. been mugged and beaten	1	YES	2	NO		
84. your home or car have been broken into	1	YES	2	NO		
85. been charged with a criminal offence	1	YES	2	NO		
86. been detained by the police	1	YES	2	NO		
87. been accused in a civil court case	1	YES	2	NO		
88. caused a traffic collision or accident	1	YES	2	NO		
89. a close acquaintance of yours has been arrested or has broken the law	1	YES	2	NO		
90. been discriminated (humiliated) against on the basis of your nationality, appearance, beliefs or other reasons	1	YES	2	NO		
91. your apartment (house) has been seriously damaged					1	YES 2 NO
92. had your apartment (house) renovated	1	YES	2	NO		
93. had problems with the owner or administrator of the building you live in (lived in)	1	YES	2	NO	3	NOT APPLICABLE
94. been seriously ill	1	YES	2	NO		

95. When, in your opinion, should Poland join the Eurozone?

1 as soon as possible

2 when the situation in the Eurozone improves

3 never

4 hard to say

96. Do you plan to go abroad within the next two years, in order to work?

- 1 YES, to the European Union country – state which one.....
- 2 YES, to a country outside the European Union – state which one.....
- 3 NO

97. –if the answer to question96 is YES, then what is the main reason for your wish to travel? (please read all reasons carefully and indicate no more than tree of the most important in your opinion)

- 97.1 I've lost all hope in finding any kind of work in this country
- 97.2 I've lost hope in finding the right work for my qualifications
- 97.3 I'm counting on much higher earnings than at Home
- 97.4 I've got no opportunity for professional development at Home
- 97.5 I'm fed up with the general atmosphere at home
- 97.6 In Poland, everything depends on who you know and not on what you can do
- 97.7 I'm expecting better social benefits in another country (child or unemployment)
- 97.8 It'll be easier to become independent abroad
- 97.9 I'd like to join my family/partner living abroad
- 97.10 People abroad are much more friendly and helpful
- 97.11 It's easier to set up one's own company abroad
- 97.12 My employer is sending me abroad
- 97.13 I want to challenge myself
- 97.14 I want to earn some money to set up my own business at home
- 97.15 I want to earn some money for my needs at home (support the family/pay off a loan/build a house/flat/buy land/equipment)
- 97.16 other reason. Which?.....

98. Which political party do you support? (leader's name in brackets)

- 1 Prawo i Sprawiedliwo (Jarosław Kaczyński)
- 2 Polskie Stronnictwo Ludowe (Janusz Piechociński)
- 3 Sojusz Lewicy Demokratycznej (Leszek Miller)
- 4 Polska Jest Najważniejsza (Paweł Kowal)
- 5 Solidarna Polska (Zbigniew Ziobro)
- 6 Ruch Palikota (Janusz Palikot)
- 7 Platforma Obywatelska (Donald Tusk)
- 8 Other
- 9 None
- 10 Difficult to say

99. Do you use a computer? 1 YES 2 NO**100. Do you use the internet? 1 YES 2 NO****101. Do you use the services of a bank? 1 YES 2 NO****102. - if YES, then which services?**

1. an account
2. debit card
3. savings account
4. credit card
5. overdraft
6. electronic/internet banking

103. - **which bank?** (please indicate your main bank for salaries, pension and day-to-day transactions)

- | | |
|--------------------------------|---------------------|
| 1. Alior Bank | 11. Getin Bank |
| 2. Bank Gospodarki ywno ciowej | 12. ING Bank 1 ski |
| 3. Bank Millennium | 13. Kredyt Bank |
| 4. Bank Pekao SA | 14. mBank |
| 5. Bank Pocztowy | 15. MultiBank |
| 6. bank spółdzielczy | 16. PKO Bank Polski |
| 7. Bank Zachodni WBK | 18. Polbank |
| 8. Citi Handlowy | 19. SKOK |
| 9. Credit Agricole | 20. other |
| 10. Eurobank | |

104. Do you trust:

104.1. commercial banks?	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.2. National Bank of Poland	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.3. Sejm	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.4. President	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.5. European Parliament	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.6. police	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.7. government	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.1. Social Insurance Institution (ZUS)	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.9. stock exchange	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.10. Open Pension Funds (OFE)	1	YES, large 2	YES, limited 3	NO 4	NO OPINION
104.11. courts	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.12. life insurance companies	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.13. insurance companies	1	YES, LARGE 2	YES, LIMITED 3	NO 4	NO OPINION
104.14. own family members	1	YES, large2	YES, limited 3	NO 4	NO OPINION
104.15. neighbours	1	YES, large2	YES, limited 3	NO 4	NO OPINION

105. Why, in your opinion do people in Poland decide not to have children? Please indicate your answer by writing the chosen number in the square on the side.

The following numbers indicate

- 1 – VERY IMPORTANT REASON
- 2 – IMPORTANT REASON
- 3 – NOT SO IMPORTANT REASON
- 4 - UNIMPORTANT REASON
- 5 –TOTALLY UNIMPORTANT REASON

- 1 inability to conceive/infertility
- 2 risk of genetic illness in the child
- 3 difficult material conditions, lack or instability of work
- 4 problems with reconciling work and parenting
- 5 a very uncertain future

- 6 partner does not want children
- 7 too short maternal leave
- 8 too short parental leave
- 9 too low child benefit
- 10 poor living conditions
- 11 too expensive or lack of places in playschools
- 12 threat to children (drugs, aggression, paedophilia)
- 13 children take away life freedom
- 14 desire for a professional career
- 15 ease of contraception
- 16 excessive putting off the decision to have a child
- 17 children are no longer needed in old age
- 18 high cost of upbringing
- 19 lack of the right, dependable partner
- 20 children are too much of a responsibility
- 21 other reason. Which?.....

106. **Do any of the above reasons** for deciding against having a first or another child **apply to you now?**

- 1 YES 2 NO

107, -- **If YES**, please write below the number of up to three reasons from the list in question 105

- 1 most important reason
- 2 second reason
- 3 third reason

108. **Do you practise any sport or physical activity?**

- 108.1. no, I do not practise any sport or physical activity
- 108.2. aerobics
- 108.3. running/jogging/nordic walking
- 108.4. gym
- 108.5. cycling
- 108.6. skiing or other winter sports
- 108.7. swimming
- 108.8. football or other team sports
- 108.9. yoga
- 108.10. martial arts
- 108.11. another sport or type of physical activity

109. **In your opinion, which features distinguish a reliable bank?**

(you may check no more than 3 answers)

- 109.1 many years' presence on the market
- 109.2 being a private bank
- 109.3 being a state-owned bank
- 109.4 high quality customer service
- 109.5 individual consulting
- 109.6 the most functional online service
- 109.7 a consultant whom I have known for many years
- 109.8 recommendations from friends
- 109.9 frequent advertisements on TV and in other media
- 109.10 advertisements with famous persons
- 109.11 large number of units
- 109.12 vast product range
- 109.13. number of clients
- 109.14. significant State Treasury share in the bank's capital (providing the bank is Polish)

Which of the causes of the Polish airplane's catastrophe in Smole sk on 10 April 2010 is in your opinion most probable? (please mark no more than two of the following causes)

- 1 the pilots' or flight controllers' error
- 2 attack or conspiracy against the Polish president
- 3 the pilots being under pressure
- 4 general chaos in the institutions responsible for the flight
- 5 other causes
- 6 it is hard to say

The next pages include the sets of questions addressed only to certain persons. Please check which conditions you meet and go to the appropriate parts of the questionnaire:

the persons currently working professionally – question 111-115

the persons who changed their job in the period 2011-2013 – questions 116-117

the persons who did not work professionally in the period 2011-2013 – questions 118-119

the persons who have a bank account – questions 120-124

the persons who use a computer – questions 125-126

the persons who use the Internet – questions 127-132

persons who have taken part in *Social Diagnosis* for the first time – questions 133-135

FOR THE PERSONS WHO WORK PROFESSIONALLY AT THE MOMENT

111. What is in your opinion most important in professional work? (please read through all the answers and then choose no more than 3, by crossing the appropriate boxes)

- 111.1 lack of tensions and stress
- 111.2 high degree of independence
- 111.3 personal development opportunities
- 111.4 work matching one's skills
- 111.5 quick promotion opportunities
- 111.6 stability of employment
- 111.7 convenient work hours
- 111.8 possibility of working at home
- 111.9 long leave
- 111.10 having a profession which is respected by others
- 111.11 appropriate pay
- 111.12 other factors

112. Which solutions would in your opinion facilitate combining professional and family duties, including parental duties? Please indicate at least three answers you consider the most important solutions.

- 112.1 part-time work
- 112.2. opportunity to share parental leave with the child's father
- 112.3. flexible work hours
- 112.4. possibility of working partly at home
- 112.5. more days off in a week
- 112.6. longer maternity leave
- 112.7. longer paid child care leave
- 112.8. higher social benefits (e.g. child care benefit, benefits for children, etc.)
- 112.9. better possibilities of child care outside home for children under 7 (more nurseries and kindergartens, the time of childcare outside home adjusted to the parents' work hours)
- 112.10. better possibilities of child care outside home for children aged 7-12 (more additional classes at schools, local care centres, etc.)

113. How many hours a week do you work?

114. Do you currently work in a managerial capacity? 1 YES 2 NO

115. -- if YES, how many staff do you have reporting to you?

**FOR THE PERSONS WHO CHANGED THEIR JOB IN THE PERIOD 2007-2011,
IRRESPECTIVE OF WHETHER THEY WORK AT PRESENT OR NOT**

116. Why did you change your job in the period 2011-2013? (*you may choose more than one reason*)

- 116.1. own decision in order to start a better/better paid job
116.2. my employment contract for a specified time expired
116.3. for reasons outside my control (health condition, dismissal, leave, company's restructuring, company's insolvency, retirement)
116.4. other reasons

117. Was the change of job connected also with the change of your profession? 1 YES 2 NO

FOR THE PERSONS WHO DID NOT WORK PROFESSIONALLY IN 2011-2013

118. Why did you not work in the period 2011-2013? (please choose up to 3 reasons, by crossing the appropriate boxes)

- 118.1 education, gaining new qualifications
118.2 taking care of the home
118.3 child-rearing
118.4 taking care of the disabled and older household members
118.5 health condition, disability
118.6 unsuitable age
118.7 lack of qualifications required by the employers
118.8 retirement
118.9 difficulties with finding a job
118.10 receiving social benefits
118.11 I did not want to work

119. Which conditions would make you take up a job in Poland? (*please choose and indicate up to 2 answers*)

- 119.1 possibility of working part-time
119.2 possibility of working at least partly at home
119.3 possibility of having flexible work hours
119.4 possibility of receiving more support from other household members in terms of family duties
119.5 possibility of using proper care services for the children or the ill
119.6 possibility of retaining the right to receive social benefits
119.7 convenient conditions of working and commuting for disabled persons
119.8 other
119.9 I do not want to work at all

FOR THE PERSONS WHO HAVE A BANK ACCOUNT

120. Do you consider the amount of contact on the part of the bank to be

1 Too much
2 Correct
3 Too little

121. What is your preferred form of contact on the part of the bank?

1 By telephone
2 Email
3 Letter on paper
4 SMS
5 Visit to branch

122.1, 122.2, 122.3. How frequent contact on the part of the bank would you consider acceptable?
(please cross each column. If you have no email account, please leave the column empty)

How often?	Telephone	Email	Letter on paper
Once a week			
Once a month			
Once a quarter			
Once every half a year			
Less than once a year			

123. Would you be likely to purchase more bank products if it did not require visiting a branch?
1 YES 2 NO3. Hard to say

124. How often do you change your main bank?

	Never	once	twice	Three times	Four times or more
In your whole life					
In the last two years					

FOR THE PERSONS WHO USE A COMPUTER

125. How many hours have you spent using a computer in the last week? hours

126. Did you perform the following activities when using a computer?
Please cross the appropriate boxes.

	YES	NO
126.1. copying or moving a file or a folder	1.	2.
126.2. copying, cutting and pasting in order to replicate or move the selected fragments of a document	1.	2.
126.3. using the basic mathematical functions in a spread sheet	1.	2.
126.4. creating an electronic presentation	1.	2.
126.5. installing new devices (e.g. printer, modem, scanner)	1.	2.
126.6. writing a computer programme in a programming language	1.	2.

FOR THE PERSONS WHO USE THE INTERNET

127. How many hours have you spent using the internet in the last week?

128. Please state whether you have performed the following activities when using the Internet: (please read through the list of possible Internet activities below and mark which of them you have ever performed and which of them you have performed in the last week, by crossing the appropriate boxes)		
Activity	Ever	In the last week
128.1. reading and sending e-mails	1.	2.
128.2. using instant messengers allowing conversations with friends (like gadu-gadu, etc.)	1.	2.
128.3. using chats	1.	2.
128.4. using discussion groups or forums	1.	2.
128.5. calling via the Internet (VoIP, Skype)	1.	2.
128.6. creating or modifying websites	1.	2.
128.7. collecting materials necessary for education or work	1.	2.
128.8. participating in online courses or trainings	1.	2.
128.9. job seeking, sending offers concerning employment	1.	2.
128.10. buying products and services online in Poland	1.	2.
128.11. purchase of products and services by internet from abroad	1.	2.
128.12. participating in online auctions	1.	2.
128.13. playing network games online	1.	2.
128.14. downloading free software	1.	2.
128.15. using Facebook	1.	2.
128.16. using other social network portals	1.	2.
128.17. using internet banking services	1.	2.
128.18. downloading free music		
128.19. creating and publishing own texts (e.g. blog, Twitter), images, music or other work online	1.	2.
128.20. obtaining information from the websites of public institutions	1.	2.
128.21. downloading or filling in official forms	1.	2.
128.22. listening to music or a radio station online	1.	2.
128.23. watching TV files online	1.	2.
128.24. ticket reservation (airplane, cinema, theatre)		
128.25. reading newspapers or books online	1.	2.
128.26. using Internet and electronic mail at home for professional reasons	1.	2.

129. **Do you use internet through your mobile phone or tablet?**
 1 YES 2 NO
 130. - if **YES** then **how often?**
 1 everyday or almost everyday
 2 a few time a day
 3 once a day
 4 once a fortnight
 5 once a month
 6 less than once a month

131. **Do you use bank services via the internet on a mobile phone or tablet?**
 1 YES 2 NO
 132. - if **YES**, then **how often?**
 1 a few times a week
 2 once a week
 3 once a fortnight
 4 once a month
 5 less than once a month

FOR PERSONS WHO ARE TAKING PART IN SOCIAL DIAGNOSIS FOR THE FIRST TIME

*If you have children who **currently do not live** with you, please answer question 133. If this does not apply to you, please leave question 133 out.*

133. **Please state the age of the children who do not live with you.**

The subsequent number of the child	1	2	3	4	5	6
Year of birth (two last digits)						

If you have ever lived with a partner for more than three months, please answer the following. If not, please stop answering the questionnaire here.

134, 135. **Please state the year of starting and finishing your time of living with a partner for over three months**
 (please fill in each column for each partner as appropriate)

The subsequent number of the partner	1	2	3	4	5	6
134. . The year in which you started to live with the partner (two last digits)						
135. The year in which you finished living with the partner (two last digits); if this is your current relationship, please leave the space blank						

THANK YOU FOR YOUR TIME

WE WOULD LIKE TO ONCE AGAIN ASSURE YOU THAT ALL PROVIDED INFORMATION WILL BE USED ONLY IN COLLECTIVE STATISTICAL SCIENTIFIC STUDIES.

on behalf of the COUNCIL FOR SOCIAL MONITORING

Professor Tomasz Panek - Warsaw School of Economics

1.3 Instructions for interviewers

INSTRUCTIONS CONCERNING THE ORGANISATION AND PRINCIPLES OF FILLING IN THE QUESTIONNAIRES UNDER SOCIAL DIAGNOSIS 2011 R6

Initial notes

The survey “Social Diagnosis” is a cyclical study, repeated on the same sample of households.

In the current seventh wave (*R7*) we are planning to interview all the households which took part in the previous rounds and consented to further participation in the survey, as well as the households from a new sample.

The 2013 study will include only those households (questionnaire for the household) from previous rounds that were present on the collective list sent to the Voivodeship Statistical Offices by e-mail. If this list includes a household, however, any of its present members is absent from such list, such a person is assigned a number following the last number from the 2009 list. If the household no longer includes a person from the list, such person retains its number and in Part I Section C lines 35, 38, 39 and 41 are filled in.

The most important information identifying the persons examined in the previous rounds is their **fixed number** – it should be carefully and visibly rewritten from the collective list.

The information on the household is collected based on the interview with the household head or a person well aware of the household matters (Part I of the questionnaire). All household members aged 16 and above (as of 1 March 2013, i.e. all persons born after 1 March 1997) fill in Part II of the questionnaire on their own in the interviewer’s presence. If any respondent is unable to fill in this part on his or her own, the interviewer is obliged to help them. Part II of the questionnaire has been prepared in two versions – a male and a female one. Men may not be given the female versions and vice versa as the questionnaire has the respondent’s gender coded in it.

The definitions, classification and groupings are in majority in accordance with the research based on the samples of households conducted by the Central Statistical Office (GUS). The proposed extensions or slightly different classifications come from the recommendations of *Eurostat* for the survey of households.

In the case of the households that were examined under *previous rounds*, apart from the full form for the current wave, you will receive also a part of the information from Section C of the previous rounds. We ask you to conduct the interview in Section C based on this information from the previous rounds, i.e. taking into account all the persons in the household present on the list of persons from previous rounds as well as any new persons in the households from *R5*.

Remember to retain the previous rounds numbers for the persons in the household and to assign the fixed numbers to them, while the persons who joined the household after the last survey or were not present on the list are assigned with the numbers following the last number of the person from the list. **If the number of persons is higher than 8, all persons with the numbers above 8 are described on a separate sheet for Section C.** For the persons who permanently left the household after the last round, please fill in only the following lines: 35, 38, 39 and 41.

Our aim is to conduct the individual interviews (Part II of the questionnaire) with all household members aged 16 and above, even with those who for various reasons were not interviewed during the previous rounds.

If there is more than one household living at the same address, the household the interviewer visited first and which consented to take part in the survey is examined.

The cards to be shown to respondents do not feature such answers as “I do not know” or “It is hard to say”, however, these answers may be present in the questionnaire and may be marked if a respondent spontaneously answers the question this way. In the questions which are not accompanied with the card, such answers are not read to respondents, but are marked (if they are present on the scale of answers) when a respondent spontaneously answers the question this way.

Please inform the examined households that, as in the previous years, they will take part in a lottery with 15 money prizes, with the value of PLN 600 each.

Detailed principles

PART I

Section A. HOUSEHOLD CHARACTERISTICS

point 0 – please enter the one-digit number to mark the status of the household in the survey

symbol

- 1 the household took part already in the study wave and still lives at the same address ⇒ go to point 1
- 2 the household took part in the fifth study wave but has changed the place of residence or all household members have moved to a multi-occupancy accommodation facility ⇒ an interview is not conducted
- 3 a new household (previously did not take part in any study wave), randomly chosen in current round

point 1 – enter the seven-digit number of the territorial unit according to the new territorial division of the country (Voivodeship, powiat, gmina)

point 3 – enter the one-digit number for the place of residence category of the household's present place of residence, according to the list below:

symbol

- 1 cities with more than 500,000 inhabitants
- 2 cities with 200,000 to 500,000 inhabitants
- 3 cities with 100,000 to 200,000 inhabitants
- 4 cities with 20,000 to 100,000 inhabitants
- 5 cities below 20,000 inhabitants
- 6 rural areas

point 4 – enter the household identification number. The identification number was hitherto composed of five digits and did not change in the subsequent survey rounds. Therefore, the households which already took part in the survey will have now the same number in the mailing list; and new households will have a new six-digit number taken from the pool of numbers for the given Voivodeship to be assigned to such household (100,001 to 105,000).

point 5 – A family is composed of the household members bound by marriage/unmarried couple, blood ties or adoption. Thus, the following types of families may be distinguished: regular families – a married or unmarried couple with no children, a married or unmarried couple with children; single-parent family – a mother with children, a father with children.

Non-family households are the household where there is no family (as defined above). There are non-family one-person households and non-family multi-person households (e.g. a grandmother with a grandson, siblings residing together, persons residing together but not related by blood). If there is no family in the household, enter 0.

Point 6 – enter the one-digit number for the main source of income in the household, in accordance with the list of symbols below (if there are several equally important sources of income, enter 7):

symbol

- 1 households of employees
- 2 households of farmers
- 3 households of self-employed persons, except for individual agricultural holding, liberal professions, self-employment
- 4 households of retirees
- 5 households of pensioners
- 6 households with income received but not earned and other than old age or disability pension
- 7 several equally important sources of income in the household

Section B. INFORMATION ABOUT CONDUCTING THE INTERVIEW

Question 5 – ask whether the household consents to participation in the next survey in 2015

Section C. COMPOSITION OF THE HOUSEHOLD

1 the person's reference number – for the households interviewed previously, please assign the household members with the same numbers as in mailing list. If there is a household member who was omitted on the list sent to the Voivodeship Statistical Office, assign the first unoccupied number. A new person in the household previously interviewed is also assigned with a subsequent number. If there are more than 8 household members, in the case of the other persons (number 9, 10, etc.) the data in C section are entered on a separate sheet, which should be folded with the questionnaire after the interview.

2 fixed number – the number assigned to the persons who took part in previous rounds and included on the list of the households which qualified for the survey in 2013 in column Q.

point 4 – please enter for the relevant person the one-digit household head's and the remaining persons symbol for the relationship with the household head:

symbol

- 1 household head
- 2 husband, wife
- 3 partner
- 4 son, daughter
- 5 son-in-law, daughter-in-law (partner of the child)
- 6 grandson, granddaughter
- 7 father, mother, father-in-law, mother-in-law
- 8 grandfather, grandmother
- 9 brother, sister
- 0 other person

The household head is the person who provides the household with all or the majority of the means of living.

line 5 – enter the one-digit symbol of the family number for each person:

symbol

- 1 for the members of the first family,
- 2 for the members of the second family,
- 3 for the members of the third family,
- 4 – 8 for the members of the fourth and further family,
- 0 for the persons who are not family members in a family household or for the persons in a non-family or a special household

line 6 – enter the one-digit symbol for the relationship with the family head The family head is the man in the case of a regular family (a married or unmarried couple with or without children) or a single parent in a single-parent family:

symbol

- 1 family head
- 2 wife
- 3 partner
- 4 son, daughter
- 5 other person outside the family
- 0 person in a non-family or special household

Note! In each questionnaire both line 4 and 6 should be filled in.

line 10 – enter the one-digit symbol for gender:

symbol

- 1 men
- 2 woman

line 11 – enter the one-digit symbol of the marital status for all household members:

symbol

- 1 unmarried
- 2 married
- 3 widow(er)
- 4 divorced
- 5 legally separated (based on a court decision)
- 6 practically separated (the spouses do not live together without a court decision)

line 16 – enter the two-digit symbol for the educational attainment:

symbol

- 10 higher education with at least a PhD title
- 11 higher education with at least an MA degree or an equivalent degree
- 12 higher education with an Engineer or Bachelor degree
- 20 post-secondary education
- 30 secondary vocational
- 40 secondary general
- 50 basic vocational
- 51 lower secondary
- 60 primary completed
- 70 no education (primary not completed, no school education)
- 99 not applicable (person aged 0-12)

line 17 – enter the total number of years in education, regardless of whether the relevant education was completed. The years of any postgraduate studies or training courses are not included. A training course is an extra-curricular education aimed at gaining or upgrading one's professional qualifications, any courses aimed at preparing for any exams, as well as language courses, computer courses, driving courses, etc.

line 18 – enter the two-digit symbol for the specialisation of the completed education:

symbol

- 14 pedagogics
- 21 art
- 22 liberal arts (religion, foreign languages, mother tongue, history, archaeology, philosophy)
- 31 social sciences (psychology, sociology, demography, political science, economy)
- 32 journalism and information
- 34 economy and administration (management, marketing, finance, banking, insurance, accounting and taxes, science about management and administration)
- 38 law
- 42 biological sciences
- 44 physical sciences
- 46 mathematics and statistics
- 48 computer science
- 52 technical science (engineering, industry, construction)
- 54 production and processing
- 58 architecture and construction
- 62 agriculture, forestry, fishing
- 64 veterinary medicine
- 71 public health
- 72 healthcare (medicine, dentistry, nursing, pharmacy)
- 76 social welfare (social services)
- 81 services for the population and transport services
- 85 environmental protection and sanitary and public utility services
- 86 protection and safety
- 90 armed forces and country protection
- 91 other
- 92 no specialisation (e.g. primary, lower secondary or secondary general education)

98 not applicable (persons who have not completed primary education yet or without primary education)

99 lack of data

line 19 – enter the one-digit symbol for the educational attainment of the person, defined as using or not using various educational services provided under the public education system, by other institutions (public and private e.g., participation in a school for the elderly known as "Uniwersytet Trzeciego Wieku") outside the school system (concerns the current situation) or self-education
symbol

1 nursery or kindergarten

2 education in a day school

3 evening, extramural and external education

4 using various forms of education outside the school system (training courses, etc.)

5 individual course of education

8 not using any educational services

For persons with 1, 2, 3 or 4 in line 19, fill in line 20 and possibly 21 (if the person uses more than one educational service). If 5 or 8 is entered in line 19, go to line 22.

lines 20-21 – enter the two-digit symbol of the type of educational service (two most important ones):
symbol

11 nursery, public kindergarten

12 nursery, private kindergarten

21 education in a public primary and lower secondary school

22 education in a private primary and lower secondary school

30 education in a basic vocational school, vocational traineeship

41 education in a public general secondary school

42 education in a private general secondary school

51 education in a public vocational secondary school

52 education in a private vocational secondary school

61 education in a public post-secondary school

62 education in a private post-secondary school

71 public higher education school

72 private higher education school

81 postgraduate studies in a public higher education school

82 postgraduate studies in a private higher education school

83 PhD studies in a public higher education school

84 PhD studies in a private higher education school

90 training courses and trainings financed by the employer

91 training courses and trainings financed from the Labour Fund

92 training courses and trainings financed from the European Social Fund

93 training courses and trainings financed with own resources of the household

94 other forms of mastering skills (such as driving lessons, learning how to play an instrument, learning a foreign language)

98 I do not know

line 22 – enter the symbol

symbol

1 if the person has a driving licence

2 if the person has no driving licence

8 person too young

lines 23-28 – for each language, enter:

1 if the person knows how to speak and write in this language

2 if the person knows how to write in this language

3 if the person does not know this language

line 30 – enter the one-digit symbol for the disability category:
symbol

- 1 for the persons who have a valid certificate from the Social Insurance Institution (ZUS)
- 2 for the persons who have a valid certificate from the Disability Evaluation Board at the Poviast Centre of Family Support (ZOoN at PCPR)
- 3 for the persons who have a valid certificate from the Social Insurance Institution and ZOoN at PCPR
- 4 for the persons who have stated that due to disability or disease they have completely or partly limited ability to perform such activities as learning, working or taking care of own household but they do not have a certificate from the medical board
- 5 disability of children aged below 16
- 0 other cases
- 8 not applicable (the person is not a disabled person)

line 31 – for the persons with 1, 2 or 3 in line 31
symbol

- 1 certificate on a severe disability or complete inability to work and live alone or on the first invalidity class
- 2 certificate on a moderate disability or a considerable inability to work or on the second invalidity class
- 3 certificate on a slight disability or a considerable inability to work or advisability of changing one's profession or on the third invalidity class

lines 32-33 – these concern a source of income of specific persons; please enter the two-digit symbols for the main and the additional source of income

symbol

- 11 permanent paid employment in the public sector
- 12 permanent paid employment in the private sector
- 13 temporary paid employment in the public sector
- 14 temporary paid employment in the private sector
- 15 use of an agricultural holding
- 16 helping in an agricultural holding
- 17 employer outside an individual holding in agriculture
- 18 permanent work for one's own account (also self-employment)
- 19 temporary work for one's own account
- 20 Helping in work for one's own account
- 21 old age pension (apart from the agricultural social insurance system)
- 22 old age pensions for individual farmers (under insurance in the Agricultural Social Insurance Fund, KRUS)
- 23 disability pensions
- 24 family pensions
- 25 maternity benefits
- 26 unemployment benefits
- 27 other benefits from the Labour Fund
- 28 allowance for persons on child care leaves (former child care benefits)
- 29 other social insurance benefits (such as child birth allowance, funeral allowance, sickness allowance)
- 30 family benefits and allowance in accordance with the Act on Family Benefits of 2003, as amended, housing allowance
- 31 social assistance benefits
- 32 other social assistance benefits (such as benefits for persons bringing up children, special purpose benefits and extraordinary benefits)
- 33 children maintenance
- 34 other income of a social benefit nature (including scholarships)
- 35 income from own property (interest, dividends, etc.)
- 36 income from the rental of a house, apartment or garage
- 37 foreign old age and disability pensions
- 38 benefits under a voluntary sickness and accident insurance system

- 39 compensation under other insurance schemes
- 40 donations, maintenance from private persons
- 41 other income
- 42 other revenues (sale of property, savings, credits)
- 43 being supported by other household members

line 34 – enter the one-digit symbol concerning the reasons for a temporary absence (absence to date or expected absence longer than 1 months)

symbol

- 1 stay at a hospital or nursing home
- 2 stay away from the household due to education
- 3 military service
- 4 other institutions (jail, prison, etc.)
- 5 work in the country, outside the place of residence
- 6 work abroad
- 7 education in the country, outside the place of residence
- 8 education abroad
- 9 business travel
- 0 other

line 35 – enter the one-digit symbol for the membership of the person in the household

symbol

- 1 the person was a member of the household subjected to the study under the previous rounds (and is in the panel sample of persons) and still is a member of this household
- 2 the person permanently left the household
- 3 the person died
- 4 a new person born after the previous study wave, of a mother who took part in that wave
- 5 the person was not a member of the household subjected to the study under the previous rounds (and is not in the panel sample of persons) if one of the following conditions is met:
it is a household subjected to the previous wave and this person became its member after the last study (came from the outside)
- b) the household is a new household in the survey (none of the household members was a member of the household which took part in the previous rounds)
- 6 the person was in the group to be subjected earlier but was mistakenly not included in the survey (the person is in the panel sample of persons)
- 7 the person returned to the household: was a member of the household in earlier rounds but not in the last study at that household (and is in the panel sample of persons).

NOTE

Lines 36-41 are filled in exclusively in the households which took part in the previous rounds. They concern the persons who were the household members in the previous study and left the household or the persons who appeared in the household in between the previous and the present study wave:

lines 36-37 – enter the date of arrival in the household – month (Arabic numerals) and year (two last digits)

lines 38-39 – enter the date of leaving the household – month (Arabic numerals) and year (two last digits)

line 40 – enter the one-digit symbol for the reason for arrival in the household
the symbol of the reason for ARRIVAL in the household

- 1 marriage, cohabitation
- 2 divorce, separation, breakdown of an informal relationship
- 3 birth
- 4 other
- 8 not applicable

line 41 – enter the one-digit symbol for the reason for leaving the household

the symbol of the reason for LEAVING the household

- 1 marriage, cohabitation
- 2 divorce, separation, breakdown of an informal relationship
- 3 death
- 4 starting own household in the country
- 5 starting own household abroad
- 6 other
- 8 not applicable

line 42

symbol

- 1 interview conducted

The interview was not conducted, although the household was contacted, because

- 2 the person was not able to answer the questions (illness, alcohol intoxication)
- 3 the person did not return a filled in questionnaire
- 4 the person initially refused to be interviewed (it is possible he or she will consent to take part in the study in the next rounds)
- 5 the person definitely refused to take part in the study now or in the future

It was not possible to contact the person because:

- 6 the person was temporarily away from the household (e.g. a short-term business trip)
- 7 the person was not at home, no one in the household gave them the form to be filled in on his or her own

Section D. ECONOMIC ACTIVITY OF HOUSEHOLD MEMBERS AGED 15+

This section concerns persons who are aged 15 as of 1 March 2013, i.e. born before the end of February 1998.

line 1 – enter the person's number, the same as the one in Section C, line 1

lines 2, 3 – symbols and routing principles have been stated in the form

line 5 – enter the symbol

symbol

1. based on an employment contract for a specified period of time (apart from the contracts listed below, being non-standard forms of employment (6-11), and for a period longer than one year)
2. based on an employment contract for an unspecified period of time
3. self-employed entrepreneur hiring employers
4. self-employed
5. helping in a family business without pay
6. temporary job (based on fixed-term employment contracts, such as replacement contracts, contracts for specific work)
7. other short-term contracts (such as summer traineeships, employment contracts for a period shorter than one year)
8. trial period employment
9. paid employment on the basis of a civil law contract (contract of mandate, contract for specific work)
10. paid employment without a formal contract or with an oral agreement
11. other

line 6 – symbols and routing principles have been stated in the form; full-time job means employment on a full-time basis at one workplace

line 7 – enter the symbol of the most important reason
symbol

1. cannot find a full-time job
2. does not want to work full-time
3. is forced to as he or she has no possibility of ensuring proper care to his or her children
4. is forced to as he or she has no possibility of ensuring proper care to an ill, old or disabled person
5. has also another job
6. other reasons

line 8 – this question is asked to all respondents; symbols and routing principles have been stated in the form

line 9 – symbols stated in the form

line 10 – this question is asked to all respondents; routing principles have been stated in the form
symbol

- 1 YES and I am currently unemployed
- 2 YES and I am currently employed
- 3 NO and I am currently unemployed but I have already found a job
- 4 NO and I am currently unemployed
- 5 NO and I am currently employed

line 11 – enter the symbol of the main reason:
symbol

- 1 education, gaining new qualifications
- 2 taking care of the home
- 3 due to child care
- 4 due to taking care of disabled and older household members
- 5 due to the health condition
- 6 due to an unsuitable age
- 7 due to the lack of qualifications
- 8 is retired
- 9 is convinced he or she will not find a job anyway
- 10 does not want to lose the right to receive social benefits
- 11 does not want to work at all
- 12 other reasons

line 12 – symbols stated in the form

line 13 – **14** enter the number of years and/or months not in employment; for the persons who have never worked enter 97 and go to line 23; in the remaining cases go to line 19

line 15 – enter the one-digit symbol for the ownership structure of the institution being the main workplace
symbol

- 1 state-owned
- 2 owned by the units of the territorial self-government
- 3 private
- 4 cooperative, owned by a social or religious organisation
- 8 not applicable (in the case of the unemployed)

line 16 – enter the one-digit symbol for the ownership structure of the institution being the additional workplace
symbol

- 1 state-owned
- 2 owned by the units of the territorial self-government

- 3 private
- 4 cooperative, owned by a social or religious organisation
- 8 not applicable (in the case of the unemployed)
- 9 not applicable (in the case of persons who do not have an additional employment)

line 17 – symbols stated in the form ((local borders should be taken into account according to the administrative division)

line 18 – enter the three-digit symbol of the profession, in accordance with the current classification of professions used in the research of the Central Statistical Office (GUS). This classification is used also in the Labour Force Survey and in the EU SILC.

line 19 – enter the three-digit symbol of the profession, in accordance with the current classification of professions used in the research of the Central Statistical Office (GUS). This classification is used also in the Labour Force Survey and in the EU SILC.

line 20 – enter how many times this person has been registered in the Labour Office as an unemployed person

line 21 – enter the total number of months not in employment

line 22 – symbols and routing principles have been stated in the form

lines 23, 24, 25 – enter the two-digit symbol of the type of educational service symbol

- 21 education in a public primary and lower secondary school
- 22 education in a private primary and lower secondary school
- 30 education in a basic vocational school, vocational traineeship
- 41 education in a public general secondary school
- 42 education in a private general secondary school
- 51 education in a public vocational secondary school
- 52 education in a private vocational secondary school
- 61 education in a public post-secondary school
- 62 education in a private post-secondary school
- 71 studies in a public higher education school – full-time studies
- 72 studies in a public higher education school – evening or extramural studies
- 73 studies in a private higher education school
- 81 postgraduate studies in a public higher education school
- 82 postgraduate studies in a private higher education school
- 83 PhD studies in a public higher education school
- 84 PhD studies in a private higher education school
- 90 training courses and trainings financed by the employer
- 91 training courses and trainings financed from the Labour Fund
- 92 training courses and trainings financed from the European Social Fund
- 93 training courses and trainings financed with own resources of the household
- 94 other forms of mastering skills (such as driving lessons, learning how to play an instrument, learning a foreign language)
- 95 individual course of education
- 96 School for the elderly know as "Uniwersytet Trzeciego Wieku"
- 98 I do not know

line 26 - symbols given in the form

line 27 – symbols and routing principles have been stated in the form

line 28 – enter the number of travels

line 29, 30 – enter the symbol
symbol

1 Austria	6 Greece	11 Germany	16 other EU Member States (Czech Republic, Slovakia, Hungary, Estonia, Lithuania, Latvia, Cyprus, Slovenia, Malta, Bulgaria, Romania)	17 USA
2 Belgium	7 Spain	12 Portugal		18 Canada
3 Denmark	8 Netherlands	13 Sweden		19 Australia
4 Finland	9 Ireland	14 Great Britain		20 other countries
5 France	10 Luxembourg	15 Italy		21 Norway

lines 31 - 32 – enter the number of months

line 33 – enter the symbol if the person meets the following condition: he/she was abroad in the period 2011-2013 for longer than 6 months and returned to Poland last year (after 1 January 2012).

symbol

1. as had been planned before going abroad
2. had been dismissed/finished the employment
3. had completed education
4. could not find a job abroad
5. due to family reasons
6. due to the decrease in the income level abroad in comparison to the income level in the country
7. due to health reasons
8. only temporarily to deal with certain matters in the country
9. other reason
99. it is hard to say

Section I. SOCIAL HELP

Question 1 – concerns various sources of assistance, both from private persons and from institutions, such as gmina or town centres of social assistance, Poviast Centres of Family Support, Regional Centres of Social Policy, secular charitable organisations (including non-governmental organisations operating in the area of social assistance, in this charitable organisations, i.e. charitable associations, foundations, committees, societies, charitable actions, such as Polish Red Cross (PCK), Polish Committee for Social Assistance (PKPS), Foundation for Social Actions (FDS)), religious organisation (such as Caritas) and parishes, trade unions and workplaces.

Section L. EARNINGS SITUATION

question 1 and 2 – in the case of a definite refusal to answer, enter 99999. In the case of a non-definite refusal to answer or difficulties with stating the exact amount, ask to specify the range and enter the symbol in the single box in the right-hand corner. If the given range is higher than any of the following, enter the symbol of the range closest to the upper value. If the respondent specifies the exact value of income, or if he/she definitely refuses to answer, the box for the income range remains blank.

symbol of the income range

1. up to PLN 300	9. PLN 6,001- 7,000
2. PLN 301 – 600	10. PLN 7,001 – 8,000
3. PLN 601 – 1,000	11. PLN 8,001 – 9,000
4. PLN 1,001 – 2,000	12. PLN 9,001 – 10,000
5. PLN 2,001 – 3,000	13. PLN 10,001 – 15,000
6. PLN 3,001 – 4,000	14. PLN 15,001 – 20,000
7. PLN 4,001 – 5,000	15. above PLN 20,000
8. PLN 5,001 – 6,000	

Question 5 – answer 5 is checked also when the household does not have to repay the credit

PART II, individual questionnaire

The interviewer fills in only the first page (by rewriting the household number, the person's number, the fixed number for the persons from the panel sample and the name from section A and C), the rest of the questionnaire is filled in in the presence of the interviewer.

In extraordinary situations the respondent may fill in the questionnaire without the interviewer being present. In such a case an envelope should be attached to the questionnaire in order to prevent other household members from looking into the filled in questionnaire before it is collected by the interviewer.

Please explain the rules of filling in the questionnaire (page two) in a clear manner, especially the meaning of the scales with numbers and word definitions only next to the extreme values. Please draw the respondents' attention to the fact that the date of birth on page 3 may not be written with Roman numerals (e.g. 15 02 78, and not 15 II 78).

Annex 2. Principles of panel sample definition

2.1. Basic principles of defining the status of persons to be subjected to panel study

In the subsequent panel waves, the group of persons to be subjected to the study (individual interviews) consists of two sub-groups: the individuals from the panel sample of persons and the individuals outside the panel sample of persons. The panel sample of persons comprises persons who are members of the households subjected to the study under the first panel wave (wave $R=1$). In the subsequent panel waves (waves $R=3$ and $R=4$), only those persons who died in between the panel waves are excluded from the panel sample of persons. Similarly, the children born to women from the panel sample of persons are added to this panel sample. All persons from the panel sample of persons above 16 years of age undergo individual interviews. In this way, the group of persons to be subjected to the panel study is updated in the subsequent panel waves, in order to account for demographic changes.

The subgroup of persons outside the panel sample of persons but also to be subjected to individual interviews in the subsequent waves of the study (according to the same rules as from the panel sample of persons) comprises all individuals who during the given wave (starting from $R=3$) of the study form a household with at least one person from the panel sample of persons (they live in the households to be subjected to the study). Thus, these persons were not members of the households from the panel sample of households subjected to the study in wave $R=2$, but became members of such households in the subsequent panel waves (starting from $R=3$). However, when such persons move to households where not one member belongs to the panel sample of persons, they are then excluded from further study.

The presented rules of determining the groups of persons to be subjected to panel study in subsequent waves require that the “status” of such groups be updated each time, as it results from its status in the previous panel waves.

2.2. Principles of identifying the households to be subjected to panel study

All households which took part in the first wave of the study ($R=1$) form the panel sample of households. Due to the dynamic changes taking place in the sample of households over time, it is necessary to establish the principles specifying which households subjected to the study in its second wave would take part in the study also in its subsequent waves. This is determined based on the results of surveys among households from the neighbouring panel waves (the earlier one, ($R-2$), and the one after it, ($R-1$)) as well as on the changes in the structure of the households subjected to the study.

The principles of identifying the households to be subjected to the study (HSS) in wave ($R-1$) on the basis of their status in waves ($R-2$) and ($R-1$) have been presented in table 1. The households not to be subjected (HNSS) to the study in wave ($R-1$) are excluded from the panel sample of households.

Table 2.1. Principles of identifying the households from the panel sample of households in wave ($R-1$)

Status of the household in wave ($R-2$)	Status of the household in wave ($R-1$)		
	Interviewed	Not interviewed due to: inability to take part in the study (e.g. old age, illness), lack of contact, initial refusal	Not interviewed due to: definite refusal, impossible to be located
Interviewed in ($R-2$)	HSS	HSS	HNSS
Not interviewed in ($R-2$)	HSS	HNSS	HNSS
A new household in ($R-1$), not subjected to an interview in ($R-2$) ³	HSS	HSS	HNSS

The analysis presented in Table 1 demonstrates that the households which were not interviewed in two subsequent panel waves are excluded from the panel sample of households. Moreover, the households where, due to structural changes, there is not a single person from the original panel sample of persons left are also excluded from the panel sample of households. On the other hand, the households whose all members moved to collective households (this concerns mainly single-person households) are not subjected to the questionnaire survey in the given panel wave but they remain in the panel sample of households. They are subjected to the so-called “monitoring” procedure which enables their inclusion in the questionnaire survey once they become private households again. The households which temporarily move abroad are handled in a similar manner.

³ A new household, added to the panel sample of households, that has been created by a person from the panel sample of persons or added to the panel sample as a result of the fact that at least one person from the panel sample of persons moved to the household.

The panel sample of households is increased with any new households created by the persons from the panel sample of persons and with the households to which the persons from the panel sample of persons move.

2.3. Principles of identifying the persons to be subjected to the panel study in the subsequent panel waves

All adult persons from the panel sample of households in the given study wave undergo an individual interview under this wave (*R-1*), regardless of whether they belong to the panel sample of persons or not. These are mainly the persons subjected to the study in the previous study wave (*R-2*), including the persons who were not interviewed in the previous wave due to various reasons. Moreover, all adult persons who became members of the households from the panel sample of households after the previous study wave (*R-2*) also undergo individual interviews.

Those persons who were not interviewed in two subsequent panel waves are excluded from the panel sample of persons (they were members of the households where no interviews were conducted under those waves, that is the households to be excluded from the panel sample of households, or they refused to take part in the study for the second time). The persons from the panel sample of persons who moved to collective households or temporarily moved abroad are also not to be interviewed. However, they are not excluded from the panel sample of persons, but “monitored” so that it is possible to include them in the subsequent panel waves of the study. The information on such persons is gathered (most often from other members of their households), including the information on the reasons for their temporary absence. Finally, the persons outside the panel sample of persons who, though interviewed in wave (*R-2*) as belonging then to the households from the panel sample of households, later moved to the households where there are no persons from the panel sample of persons, are not interviewed in the given study wave (*R-1*). Such persons are excluded from further research.

Annex 3. Comparative analysis of living conditions

3.1. A Taxonomic measure of living conditions

Algorithm of the construction of taxonomic measure of living conditions

1° Variable value standardisation:

$$z_{ij} = \frac{x_{ij} - \bar{x}_j}{S(x_j)}, \quad \bar{x}_j = \frac{\sum_{i=1}^n x_{ij}}{n}, \quad S(x_j) = \sqrt{\frac{\sum_{i=1}^n (x_{ij} - \bar{x}_j)^2}{n}}$$

where:

x - value of the j -th variable for the i -th Voivodeship,

z - value of the j -th standardised variable for the i -th Voivodeship

2° Model pattern based on an abstract voivodeship P_o with the following variable values:

$$z_{oj} = \begin{cases} \max_i z_{ij} & \text{dla } j \in S \\ \min_i z_{ij} & \text{dla } j \in D \end{cases} \quad \begin{matrix} (j = 1, 2, \dots, m), \\ (i = 1, 2, \dots, n). \end{matrix}$$

where:

S - set of stimulants

D - set of destimulants.

3° We calculated the distance between particular Voivodeship and the model Voivodeship P_o : as an arithmetical unweighted average:

$$c_{io} = \sqrt{\sum_{j=1}^m (z_{ij} - z_{oj})^2}, \quad (i = 1, 2, \dots, n),$$

or as a arithmetical weighted average:

$$c_{io} = \sqrt{\frac{\sum_{j=1}^m (z_{ij} - z_{jo})^2 \cdot w_j}{\sum_{j=1}^m w_j}}, \quad (i = 1, 2, \dots, n).$$

4° We estimate the taxonomic measure of the living conditions for each Voivodeship:

$$d_i^R = \begin{cases} 1 & \text{dla } d_i \geq 1 \\ d_i & \text{dla } d_i < 1, \end{cases}$$

where:

$$d_i = \frac{c_{io}}{c_o},$$

therefore:

$$c_o = \bar{c}_o + 3S_o; \bar{c}_o = \frac{1}{n} \sum_{i=1}^n c_{io}; S_o = \sqrt{\frac{\sum_{i=1}^n (c_{io} - \bar{c}_o)^2}{n}}.$$

Table A.3.1. Variables characterising the various dimensions of household living conditions.

Variables	Variable character	Variable variant	Weight of variable variant
1. Income			
1.1 equivalent net income	S	-	-
2. Nutrition			
<i>Incidence of financial difficulties in the satisfaction of requirements for the following food items</i>			
2.1 vegetables and vegetable products	D	-	-
2.2 fruit and fruit products	D	-	-
2.3 meat and poultry	D	-	-
2.4 meat and poultry products	D	-	-
2.5 fish and fish products	D	-	-
2.6 butter and other edible fats	D	-	-
2.7 milk	D	-	-
2.8 milk products	D	-	-
2.9 sugar	D	-	-
2.10 sugar products	D	-	-
2.11 stimulants	D	-	-
3. Material affluence			
<i>3.1 Household equipment and durable goods</i>			
<i>Non-ownership due to financial concerns:</i>			
3.1.1 automatic washing machines	D	-	-
3.1.2 dishwashers	D	-	-
3.1.3 microwave	D	-	-
3.1.4 LCD or plasma TV	D	-	-
3.1.5 satellite or cable TV	D	-	-
3.1.6 iPad or other tablet	D	-	-
3.1.7 DVD player	D	-	-
3.1.8 home cinema	D	-	-
3.1.9 desktop computer	D	-	-
3.1.10 portable computer	D	-	-
3.1.11 personal car (personal delivery vehicle)	D	-	-
3.1.12 home internet access	D	-	-
3.1.13 landline telephone	D	-	-
3.1.14 motorboat, sailboat	D	-	-
3.1.15 allotment	D	-	-
3.1.16 holiday home	D	-	-
3.1.17 electronic reader	D	-	-
3.2 Household savings	S	Lack of savings	0
		savings in terms of income for:	
		1 month	1
		3 months	2
		4-6 months	3
3.3 Household borrowings and debts	D	Lack of borrowings	0
		borrowings in terms of income for:	
		1 month	1
		3 months	2
		4-6 months	3
	7-12 months	4	
	over 12 months	5	

4 Housing conditions

<i>4.1 Equipment with media Not owned by household</i>			
<i>4.1.1 mains water</i>	<i>D</i>	-	-
<i>4.1.2 flushing toilet</i>	<i>D</i>	-	-
<i>4.1.3 bathroom with shower and bathtub</i>	<i>D</i>	-	-
<i>4.1.4 hot running water</i>	<i>D</i>	-	-
<i>4.1.5 mains gas</i>	<i>D</i>	-	-
<i>4.1.6 central heating (common or individual)</i>	<i>D</i>	-	-
<i>4.1.7 non-independent dwelling</i>	<i>D</i>	-	-
<i>4.1.8 living space per person in m²</i>	<i>S</i>	-	-

5. Children's education

<i>Occurrence of financial difficulties resulting in:</i>			
<i>5.1 forgoing of additional educational activities</i>	<i>D</i>	-	-
<i>5.2 limitation or suspension of school payments</i>	<i>D</i>	-	-
<i>5.3 forgoing of school dinners</i>	<i>D</i>	-	-
<i>5.4 forgoing of private lessons</i>	<i>D</i>	-	-
<i>5.5 change to a cheaper school</i>	<i>D</i>	-	-
<i>5.6 other limitations</i>	<i>D</i>	-	-

6. Healthcare

<i>Lack of funds for health requirement satisfaction in the form of necessary:</i>			
<i>6.1 purchasing of prescriptions or medicines recommended by doctors</i>	<i>D</i>	-	-
<i>6.2 dental care</i>			
<i>6.3 dental prosthetics</i>			
<i>6.4 visit to the doctor</i>			
<i>6.5 medical tests (laboratory, x-ray, ECG)</i>			
<i>6.6 rehabilitation</i>	<i>D</i>	-	-
<i>6.7 sanatorium therapy</i>			
<i>6.8 hospital treatment</i>			

8. Participation in the arts and entertainment

<i>Necessity to forgo, for financial reasons, visits to the</i>			
<i>7.1 cinema</i>	<i>D</i>	-	-
<i>7.2 theatre, opera, operetta, philharmonic or concert</i>	<i>D</i>	-	-
<i>7.3 museum or exhibition</i>	<i>D</i>	-	-
<i>Necessity to forgo, for financial reasons, the purchase of</i>			
<i>7.4 books</i>	<i>D</i>	-	-
<i>7.5 the press</i>	<i>D</i>	-	-

8. Rest and leisure

<i>Necessity to forgo, for financial reasons</i>			
<i>8.1 summer camp or other trips for children</i>	<i>D</i>	-	-
<i>8.2 breaks and other trips for adults</i>	<i>D</i>	-	-
<i>8.3 family outings for both children and adults</i>	<i>D</i>	-	-

3.2. Grouping of Voivodeship by similarity of living conditions

We grouped Voivodeships by similarity in terms of the internal structure of their characteristic variables. These described the level of requirement satisfaction in specific living condition dimensions obtained on the basis of a taxonomic measurement of living conditions (table 4.8.1). The grouping fulfilled two basic conditions:

- homogeneity: the Voivodeships should be similar as far as possible,
- heterogeneity: the Voivodeships in different groups should differ as far as possible.

Various multivariate comparative analysis methods may be applied for Voivodeships grouping (Panek, 2009, p. 105 and further). In this case we used the k-average method to optimise the given object grouping (here by Voivodeship).

The entry point for optimisation methods is to establish the desired number of object groups we wish to create. Then we decide on the initial content of each specific group using the following range of approaches (Grabowski et al, 1989, pp. 77-78):

- random selection,
- experts' opinion,
- use of arbitrarily selected variables,

- grouping gained with the aid of any taxonomic method taken as an initial grouping,
- ordering objects according to their distance from the centre of gravity of particular object groups.

The objects at the group centre of gravity are those defined according to the following formula:

$$1 + (r-1) \binom{n}{z}$$

- in which r is the following group number and n the number of grouped objects.

Optimisation methods seek to improve the quality of initial object grouping by moving objects between groups in accordance with defined goodness of grouping criteria..

Each optimisation method differs in terms of defined optimisation criteria and various procedures of practice. The k -average method also has a range of variants differing above all by how qualitative grouping criteria are defined and the rules of shifting objects (here Voivodeships) between groups in the group optimisation process rules of initial object grouping and the halting of the process of improving the goodness of grouping.

The k -average method version applied in this study to establish goodness of grouping criterion is based on the maximisation of intergroup variability in relation to variability within groups. Initially we establish the division of voivodships by group and number of interactions by which we seek to optimise the grouping. Then we calculate the value of goodness of grouping function that makes up the relation of intergroup differentiation to the differentiation within groups. The assessment of intergroup differentiation is most often defined as the sum of distances of voivodship group gravity centres from the centre of gravity of the total of studied voivodships. However, the assessment of the differentiation within groups is therefore the sum of distances of objects from the centre of gravity of the group to which they were classified.

The next step is to calculate the gravity centres for each particular group and assign voivodships to groups on the basis of minimising their distance from the group centres. Then we verify if the goodness of grouping function value has not increased, and if such a change has not occurred we complete the procedure in the assumption that the given grouping is optimal. In the opposite case, we run a further interaction, verifying whether the shift of voivodships between groups does not return a rise in the value of goodness of grouping function. We continue this procedure until the value of goodness of grouping function does not increase or we have reached the assumed number of interactions.

Annex 4. Methodology of analysing poverty

4.1. Monetary poverty

4.1.1. Definition

4.1.1.1 Objective approach

In the objective approach, the poverty line was based on the minimum of existence value for the 4th quarter of 2013, adjusted with a relevant consumer price index, calculated by the Institute for Labour and Social Studies for a single-person household of employees. The poverty line for March 2011 constituted the value of the poverty line of February/March 2013, adjusted with a relevant consumer price index. For all other types of households, the poverty line was calculated as the product of the adjusted minimum of existence value and an appropriate equivalence scale.

The minimum of existence income is equivalent to the value of the basket of consumer goods established for a household having specific social and demographic features. The contents of such basket should provide the household with such living conditions which enable solely “survival” in good health and being able to work (Deniszczuk, Sajkiewicz, 1996). This means that the minimum value of existence is the line of extreme poverty.

4.1.1.2. Subjective approach

4.1.1.2. Subjective approach

In the subjective approach to determining the poverty line, the subjective poverty line method was used (Goethart, Halberstadt, Kapteyn and Van Praag, 1997; Panek 2011). In this method, the households themselves indicate the lowest levels of income necessary for them to make ends meet, which are treated as their specific poverty lines. The levels of income declared by specific households depend mainly on their size (the number of persons in the household) and their actual income.

This relation may be presented in the form of the following regression equation:

$$\ln y_{\min} = r_0 + r_1 \ln L + r_2 \ln y, \quad (1)$$

where:

L – number of persons in the household,

y – actual income of the household,

y_{\min} – the lowest level of income necessary to make ends meet, indicated by the household itself.

The parameters of the above regression function, estimated with the use of the least squares method, were the basis for calculating the poverty line for subsequent years of the study. The poverty line is obtained as the value of income y^* , which – when substituted for y_{\min} and y – satisfies equation (1). The values of the poverty line (y^*) dependent on the number of persons in the household were finally established on the basis of the following formula:

$$y^*(L) = \exp \frac{r_0 + r_1 \ln x}{1 - r_2}. \quad (2)$$

4.1.2. Equivalence scales

4.1.2.1. Objective approach

The equivalence scales adopted in the objective approach were estimated, both under the unidimensional and multidimensional approach, on the basis of the procedure using the information on the amount of expenditure of the households (Szulc, 2014). This procedure takes into account the fact that the households of a different composition spend income in different ways. For example, in the households of young persons less is spent on medical care and more on food, unlike the households of older persons. At the same time, it was assumed that the structure of consumption in the households reflects their actual needs.

A household of employees of a single person aged between 30 and 59 was established as the point of reference (that is, as a “standard” household, with the equivalence scale of 1). The value of the equivalence scale for any other household may be then interpreted as the number of “standard”

households it includes (that is, the number of “standard” persons in our case). The equivalence scales were estimated on the basis of the following formula:

$$\ln m_i = \frac{1}{2} \sum_{j=1}^m \sum_{s=1}^n [m_{sj} (w_{si} + w_{sr})] \ln \frac{A_{ji}}{A_{jr}}, \quad (3)$$

where:

m_i – equivalence scale for the i -th household,

w_{si}, w_{sr} – percentage of expenditure of the i -th and r -th household for the s -th good or group of goods. In this case the r household is the standard household.

m_{sj} – elasticity of expenditure for the s -th good in relation to demographic characteristic j ($j=1,2,..,m$).

A_i, A_r – vectors of demographic characteristics of the i -th and r -th household.

In the presented study, the vectors of demographic characteristics were based on the number of adult persons in the household (above 16 years), the number of children (below 10 years and from 10 to 15 years) and the age of the head of household (16-29 years, 30-60 years and above 60).

The m_{sj} parameters are obtained through the estimation of the model of consumption demand, with the following explanatory variables: the expenditure of the household, the number of adult persons and children in the household and the prices of consumer goods. These are interpreted as the demographic elasticities of expenditure on specific goods. Thus, the equivalence scale obtained on the basis of equation (3) is a geometric mean of the elasticities of expenditure in relation to the demographic variables weighted with the shares of expenditure on specific goods in the total expenditure.

4.1.2.2. Subjective approach

In the subjective approach, the estimates for the equivalence scales were based on the poverty lines calculated for households with different numbers of persons in the household, with the use of formula (2). A single-person household was assumed as the “standard” household being the point of reference (with the equivalence scale of 1). The value of the equivalence scale for a L -person household is obtained by dividing the value of its poverty line by the value of the poverty line for a one-person household:

$$m_L = \frac{y^*(L)}{y^*(1)}. \quad (4)$$

4.1.3. Measurement

In the unidimensional (monetary) approach taking into account only current household income, we can concentrate on the assessment of the actual phenomenon of poverty if we take into consideration household equivalent incomes and the poverty line.

Aggregate poverty indexes (Panek 2011) have the widest application in poverty analysis. These are statistical formula aggregating individual poverty measures (for individual households or persons) and allowing assessment on the national scale in terms of territory or typological household groups. Because there is no single, universal formula applicable here, studies should use various formula of aggregated index providing information on various aspects of poverty.

Because in the multidimensional approach to the measurement of poverty we measure its both monetary and non-monetary (material deprivation) aspects, we shall name indexes measuring monetary poverty by their function. The most popular index assessing the incidence of monetary poverty (*monetary poverty incidence*) is the *headcount monetary poverty ratio*, which is the share of units (persons or households) with income below the poverty line:

$$H^{um} = \frac{n_{um}}{n}, \quad (5)$$

where:

n – number of individuals in the studied population,

n_{um} – number of monetary poor in the studied population

This index has the value of 0 when there are no poor households and 1 if all units studied have equivalent incomes below the poverty line.

The percentage of those in poverty tells us nothing about other aspects of poverty, as its value is quite independent of whether incomes are close to the poverty line or close to zero. In the presented study we propose widening the analysis of monetary poverty to the three other aspects beyond its incidence. The basic measure of monetary poverty depth is the monetary poverty gap index defined as:

$$I^{um} = \frac{1}{n_{um}} \sum_{i=1}^{n_{um}} \left(\frac{y^* - y_i^e}{y^*} \right), \quad (6)$$

where:

y^* - is the monetary poverty line

y_i^e - equivalent income of the i -th individual.

This measure is different to the monetary poverty gap as it is for the entire population of households, not only those in poverty. The sum of poverty gaps of all individuals (the income gaps of nonmonetary-poor individuals are naturally 0) is here divided by the number of all studied individuals. The income gap index measures the costs of eliminating monetary poverty (in relation to the poverty line), since it indicates the amount of equivalent income (measured as a percentage of the poverty line) which should, on average, be transferred to each of the poor for the income of all studied individuals to move above the poverty line. This index assume values in the interval [0,1] like the poverty income gap index, indicating no poor monetary households as 0 in the population and 1 when the income of all households in poverty equals zero.

Another aspect of monetary poverty is *monetary poverty intensity*, the most frequently used index of which is the *income gap index*:

$$IT^{um} = \frac{1}{n} \sum_{i=1}^{n_{um}} \left(\frac{y^* - y_i^e}{y^*} \right) \quad (7)$$

This index may be also presented as the product of the monetary poverty headcount ratio and the poverty gap as it describes both the incidence and depth of poverty:

$$IT^{um} = H^{um} \cdot I^{um} \quad (8)$$

This measure is different to the poverty gap as it is for the entire population of households, not only those in poverty. The sum of poverty gaps of all units (the gaps of non-poor units are naturally 0) is here divided by the number of all studied units. The income gap index measures the costs of eliminating monetary poverty (in relation to the breadline), since it indicates the amount of equivalent income (measured as a percentage of the breadline) which should, on average, be transferred to each of the poor for the income of all studied units to move above the breadline. This index uses 0-1 values like the poverty income gap index, indicating no poor households as 0 in the population and 1 when the income of all households in poverty equals zero.

The fourth group of indexes assesses *monetary poverty severity*, assessing monetary poverty incidence, the distance between poor households' income and the poverty line (monetary poverty depth) and also income inequalities among the poor.

The basic index of monetary poverty severity most often applied in practice is the *squared income gap index*:

$$SE^{um} = \frac{1}{n} \sum_{i=1}^{n_{um}} \left(\frac{y^* - y_i^e}{y^*} \right)^2 \quad (9)$$

It may also be presented in a form that shows the impact of specific aspects of poverty on the analysed phenomenon:

$$SE^{um} = H \left(\frac{y^* - \overline{y_i^{eum}}}{y^*} \right)^2 + \frac{S^2(y_i^{eum})}{(y^*)^2}, \quad (10)$$

where:

$\overline{y_i^{eum}}$ - average equivalent income of the monetary poor,

$S^2(y_i^{eum})$ - variance of equivalent income in the population of the poor in monetary terms.

As opposed to the income gap index, in this index the greater the distance from the income determining the poverty line and the equivalent income of the monetary poor, the greater the weights assigned to such households. Therefore, monetary poverty severity among the monetary poor, and at the same time

the value of this index, rise together with the increase in the distance between monetary poor equivalent income and the poverty line. The weights assigned to the households are directly proportional to the size of their income gaps. For example, if the income gap of a given individual is 10% of the poverty line, the individual receives a weight of 10% of all studied individuals weights. This index is 0 when there are no monetary poor households in the studied population. The value of the index increases together with the number of monetary poor individuals, their income gaps rise and increase of the income inequalities between them. The index has its maximum value of 1 when all studied individuals have income equal to zero.

4.2 Non-monetary poverty (material deprivation)

The first step to measuring non-monetary poverty is defining its non-monetary dimensions closely linked to the need-groups of the studied units (persons and households), followed by the selection of variables that are symptoms of non-monetary poverty in each of its dimensions. The study considered the following dimensions of deprivation and their symptoms:

1. Satisfaction of household nutritional requirements (a lack of requirement satisfaction for financial reasons).

Lack of financial means to satisfy nutritional requirement for:

1.1 Vegetables and vegetable products

1.2 Fruit and fruit products.

1.3 Meat and poultry.

1.4 Meat and poultry products.

1.5 Fish and fish products.

1.6 Butter and other edible fats.

1.7 Milk.

1.8 Milk products.

1.9 Sweets.

1.10 Confectionaries.

1.11 Stimulants including alcohol and cigarettes.

2. Household equipment and durable goods (lack of equipment or goods for financial reasons).

Lack of financial means to satisfy nutritional requirement for:

2.1. Washing machine.

2.2. Dishwasher.

2.3. Microwave oven.

2.4. LCD/plasma TV.

2.5. Pay TV (satellite or cable).

2.6. Computer (desktop or laptop).

2.7. Passenger car.

2.8. Access to home internet.

2.9. Landline.

3. Housing conditions and payment.

3.1. Too high density (less than 5m² per person).

3.2. Lack of mains water.

3.3. Lack of flushing toilet.

3.4. Lack of bathroom with bath or shower.

3.5. Lack of hot running water.

3.6. Lack of mains or bottled gas.

3.7. Lack of central heating (collective or individual).

3.8. Non-payment of rent.

3.9. Non-payment of gas or electricity bills.

3.10. Non-payment of mortgage instalments.

4. Children's education (forgone for financial reasons).

4.1. Resignation from extra-curricular activities.

4.2. The limitation or suspension of school fees.

4.3. Resignation from school lunches.

4.4. Resignation from private lessons.

- 4.5. Changing to a cheaper school.
- 4.6. Other restrictions.
5. Culture (forgone for financial reasons).
 - 5.1. Cinema.
 - 5.2. Theatre, opera, operetta, philharmonia, concert.
 - 5.3. Museum or exhibition.
 - 5.4. Purchase of book.
 - 5.5. Purchase of press.
6. Leisure (forgone for financial reasons).
 - 6.1. Camp and other children's group trips.
 - 6.2. Holidays, trips adults.
 - 6.3. Family outings and trips.
7. Healthcare (forgone for financial reasons).
 - 7.1. Prescriptions or doctor's recommended medicine.
 - 7.2. Dental treatment.
 - 7.3. Dental prosthetics .
 - 7.4. Visits to the doctor.
 - 7.5. Medical tests.
 - 7.6. Rehabilitation.
 - 7.7. Sanatorium therapy.

Symptoms of material deprivation included in analysis are measured on a nominal scale and are binary except for one symptom. As a result, we can only determine the presence or absence of a symptom of poverty in the studied individual (the household), that is, whether the studied individual is subject or not subject to deprivation in terms of a symptom. When a measurement of poverty symptom is possible on a stronger scale, i.e. at least ordinal, we can also measure the depth, intensity and severity of individual material deprivation by symptom.

The measure various aspects of monetary poverty presented in 5.3.1 can be used, after the appropriate modification, to analyse non-monetary poverty (material deprivation) at the level of material deprivation symptoms, dimensions of material deprivation and non-monetary poverty in all its dimensions including the intangible. The measure assessing the incident of material deprivation for individuals (persons and/or households), with the j -th symptom of deprivation in the h -th its dimension, which is equivalent to the *headcount monetary ratio*, is the headcount material deprivation ratio, that is, the percentage of

individuals subject to material deprivation due to the j -th symptom in the h -th dimension: $H_{hj}^{dm} = \frac{n_{hj}^{dm}}{n}$,

(11)

where:

n_{hj}^{dm} - is the number of studied units in material deprivation, by the j -th symptom in the h dimension.

If the symptom of material deprivation is measured on a binary scale, the individual is materially deprived when is characterized by a symptom of poverty. When a symptom of deprivation is measured on a stronger scale (at least ordinal), a individual is in deprivation with this symptom when the value of this symptom for this individual exceeds the threshold value. The threshold for symptom 3.1 (excessive high-density housing) is set at 5 m² per person. In the second situation presented, we also evaluate other aspects of individual material deprivation by given symptom of deprivation.

First we order the values of a given symptom of deprivation by increasing degree of deprivation risk. The measure of material deprivation depth by the j -th symptom of deprivation in the h -th dimension of material deprivation, is the *material deprivation gap index* of individuals subject to deprivation of a given symptom:

$$I_{hj}^{dm} = \frac{1}{n_{hj}^{dm}} \sum_{i=1}^{n_{hj}^{dm}} \left(\frac{z_{hj}^* - z_{i,hj}}{z_{hj}^*} \right), \quad (12)$$

where:

z_{hj}^* - the poverty line value of the j -th deprivation symptom in the h -th dimension, that is the value of the j -th deprivation symptom in the h -th dimension above which a given individual is no longer in deprivation in terms of that symptom¹¹,

$z_{i,h}$ - level of the i -th individual deprivation in terms of the j -th deprivation symptom in the h -th dimension.

Measure of material deprivation intensity by the j -th symptom of deprivation in the h -th dimension using the *material deprivation gap index* in terms of a given symptom of deprivation:

$$IT_{hj}^{dm} = \frac{1}{n} \sum_{i=1}^{n_{hj}^{dm}} \left(\frac{z_{hj}^* - z_{i,hj}}{z_{hj}^*} \right). \tag{13}$$

Measure of material deprivation severity in terms of the j -th symptom of material deprivation in the h -th dimension, we use *the square of the deprivation gap index* by given symptom:

$$SE_{hj}^{dm} = \frac{1}{n} \sum_{i=1}^{n_{hj}^{dm}} \left(\frac{z_{hj}^* - z_{i,hj}}{z_{hj}^*} \right)^2. \tag{14}$$

In order to evaluate different aspects of material deprivation in each of its dimensions, we adopted the material deprivation line for each dimension of material deprivation, i.e. an upper limit of deprivation symptom numbers at which the individual is in deprivation (table 4.1).

Table 4.1. Poverty material deprivation lines for particular dimensions of material deprivation

Material deprivation dimension	Material deprivation line
1. Satisfaction of nutritional requirement	5 or more symptoms
2. Equipment with durable goods	4 or more symptoms
3. Housing conditions and housing charges	4 or more symptoms
4. Children's education	2 or more symptoms
5. Culture	2 or more symptoms
6. Leisure	1 or more symptoms
7. Healthcare	3 or more symptoms

We assume that the threat of material deprivation for a individual (person or household) increases with the number of reported symptoms of deprivation in these dimensions. Next, after arranging the number of deprivation symptoms by decreasing degree of deprivation (from the largest number of deprivation symptoms to the absence of deprivation symptoms) we define, for each dimension of deprivation, a variable by assigning successive natural numbers to these numbers of symptoms ($z_h = 0, 1, 2, \dots, k_h$). The index measuring the incidence of material deprivation in the h -th dimension is the *headcount material deprivation ratio* in this dimension, that is, the percentage of individuals subject to material deprivation in the h -th dimension:

$$H_h^{dm} = \frac{n_h^{dm}}{n}, \tag{15}$$

where:

n_h^{dm} - the number of individuals subject to material deprivation in the h -th dimension, i.e. the number of individuals characterized by at least that number of symptoms of deprivation at which we accept it is subject to deprivation in the h -th dimension.

The evaluation of material deprivation depth of materially deprived in the h -th dimension is the *material deprivation gap index for materially deprived individuals* in the h dimension is defined as follows:

$$I_h^{dm} = \frac{1}{n_h^{dm}} \sum_{i=1}^{n_h^{dm}} \left(\frac{z_{i,h} - z_h^*}{z_h^*} \right), \tag{16}$$

where:

$z_{i,h}$ - the number of symptoms of material deprivation in the h -th dimension and the i -th materially deprived individual, -

z_h^* - the material deprivation line in the h -th dimension, that is the lower limit of numbers of deprivation symptoms at which the individual is in deprivation.

The measurement of the intensity of material deprivation in the h -th dimension is conducted with the aid of a *material deprivation index gap* in the h -th dimension:

$$IT_h^{dm} = \frac{1}{n} \sum_{i=1}^{n_h^{dm}} \left(\frac{z_{i,h} - z_h^*}{z_h^*} \right) \quad (17)$$

The severity of material deprivation in the h -th dimension is assessed with the aid of an index that is the *square of the material deprivation gap* in the h -th dimension:

$$SE_h^{dm} = \frac{1}{n} \sum_{i=1}^{n_h^{dm}} \left(\frac{z_{i,h} - z_h^*}{z_h^*} \right)^2 \quad (18)$$

A general assessment of material deprivation (a combination of all its dimensions) requires an analysis of the deprivation dimensions in which the studied individual finds itself.

In order to assess the various aspects of material deprivation in all its dimensions we build up aggregate indexes. Next, after arranging the number of deprivation dimensions by decreasing degree of deprivation (from the largest number of dimensions in which a individual can be deprived to the absence of dimensions in which a individual can be deprived) we define a variable by assigning successive natural numbers to these numbers of dimensions ($z = 0, 1, 2, \dots, h$). Then we determine the material deprivation line, corresponding to the higher limit of the number of dimensions of deprivation at which the individual is not in deprivation. It was assumed that the given household is non-monetary poor (is in material deprivation) when it reports material deprivation in at least three of its dimensions.

The *headcount material deprivation ratio* that assesses the incidence of material deprivation, which is equivalent to the *headcount monetary poverty ratio* in the assessment of monetary poverty incidence, is the percentage of individuals (persons, households) in material deprivation:

$$H^{dm} = \frac{n^{dm}}{n}, \quad (19)$$

where:

n^{dm} - the number of individuals in material deprivation in the studied population.

The measurement assessing the depth of material deprivation is the *material deprivation gap index* of individuals in deprivation defined as follows:

$$I^{dm} = \frac{1}{n^{dm}} \sum_{i=1}^{n^{dm}} \left(\frac{z_i - z^*}{z^*} \right), \quad (20)$$

were:

z_i - the number of material deprivation dimensions in the i -th materially deprived individual,

z^* - the material deprivation line.

The measurement of material deprivation intensity is conducted with the aid of the *material deprivation gap index*:

$$IT^{dm} = \frac{1}{n} \sum_{i=1}^{n^{dm}} \left(\frac{z_i - z^*}{z^*} \right). \quad (21)$$

The measurement of *material deprivation severity* will be done with the *squared material deprivation gap index*:

$$SE^{dm} = \frac{1}{n} \sum_{i=1}^{n^{dm}} \left(\frac{z_i - z^*}{z^*} \right)^2. \quad (22)$$

4.3. Measurement of co-incidence of monetary and non-monetary poverty

The final stage of a multidimensional analysis of poverty is the assessment of the co-incidence of monetary poverty and non-monetary poverty. The incidence of both monetary poverty and material deprivation substantially worsen the severity this phenomenon. If the household does not achieve both current income at least equal to the monetary poverty line and is subject to material deprivation, its financial resources, including not only current income, but also income from previous periods and accumulated non-cash assets is not sufficient to satisfy its basic needs at the minimal acceptable level. This poverty is *manifest poverty*.

A number of measures of manifest poverty is applied to conduct an evaluation of different aspects of cumulative monetary poverty and non-monetary poverty. A measurement of the incidence of combined

monetary and non-monetary poverty, that is *manifest poverty incidence*, is the proportion of individuals both in monetary poverty and material deprivation, that is, the *manifest poverty headcount ratio* defined as follows:

$$H^{uo} = \frac{\sum_{i=1}^{n_u} n_i | x_i \in X^{dm}}{n}, \quad (23)$$

where:

X^{dm} - set of materially deprived individuals,

$x_i \in X^{dm}$ - the *i*-th individual, which belongs to materially deprived individuals set.

The measure of manifest poverty depth is the *manifest poverty gap index of manifestly poor*, i.e. the monetary poor also in deprivation:

$$I^{uo} = \frac{1}{2n^{um}} \sum_{i=1}^{n^{um}} \left(\frac{y^* - y_i^e}{y^*} \right) | x_i \in X^{dm} + \frac{1}{2n^{dm}} \sum_{i=1}^{n^{dm}} \left(\frac{z_i - z^*}{z^*} \right) | x_i \in X^{um}, \quad (24)$$

where:

X^{um} - set of monetary poor individuals,

$x_i \in X^{um}$ - the *i*-th individual, which belongs to monetary poor individuals.

The manifest poverty intensity index is the *manifest poverty gap index*:

$$IT^{uo} = \frac{1}{2n} \sum_{i=1}^{n^{um}} \left(\frac{y^* - y_i^e}{y^*} \right) | x_i \in X^{dm} + \frac{1}{2n} \sum_{i=1}^{n^{dm}} \left(\frac{z_i - z^*}{z^*} \right) | x_i \in X^{um}. \quad (25)$$

The measure of manifest poverty severity is the *squared manifest poverty gap index*:

$$SE^{uo} = \frac{1}{2n} \sum_{i=1}^{n^{um}} \left(\frac{y^* - y_i^e}{y^*} \right)^2 | x_i \in X^{dm} + \frac{1}{2n} \sum_{i=1}^{n^{dm}} \left(\frac{z_i - z^*}{z^*} \right)^2 | x_i \in X^{um}. \quad (26)$$

4.4. Analysis of changes in poverty over time

When analysing the dynamic phenomena related to poverty, it is particularly important whether a specific household is suffering poverty temporarily or whether this condition is of a permanent character (Panek, 2011). This is particularly significant when formulating the tasks under social policy aimed at fighting poverty, as these should focus on counteracting permanent poverty. Identifying the character of poverty is possible solely by means of a panel approach which consists in the observation of the same households in all periods (years). Hence, in the presented study on poverty, the assessment of the changes in poverty was based on the information concerning only those households which took part in all last two study phases in 2011 and 2013.

The analyses conducted as part of the study examined the character of poverty by means of analysing the mobility of the household in terms of its position above or below the poverty line is presented in table 5.2

Table 5.2. The scheme of flows of households across the poverty line

Poverty sphere status in the period <i>t</i> -1	Poverty sphere status in the period <i>t</i>		$n_{j,t-1}$
	non-poor households (<i>j</i> =0)	poor households (<i>j</i> =1)	
non-poor households (<i>j</i> =0)	$n_{00,t-1,t}$	$n_{01,t-1,t}$	$n_{0,t-1}$
poor households (<i>j</i> =1)	$n_{10,t-1,t}$	$n_{11,t-1,t}$	$n_{1,t-1}$
$n_{j,t}$	$n_{0,t}$	$n_{1,t}$	n

The assessment of households' mobility in relation to their status of being below or above the poverty line is based on the analysis of the flows of households between these statuses in two comparable periods (years). The scheme of flows of households between the status of being below or above the poverty line under the conventional (unidimensional) approach is presented in table 1.

In the case of poverty analysis in relation to the income situation of households, the values on the diagonal of the matrix of flows $N = [n_{jj',t-1,t}]$ indicate the number of households which did not change their status of being below or above the poverty line in the two comparable periods (i.e. in both comparable periods (years) these households were or were not below the poverty line). The number of households which "moved" above the poverty line is below the diagonal, and the number of households which "moved" below the poverty line is above the diagonal.

The indices of mobility, which are synthetic assessments of the scale of mobility of the households in relation to their being above or below the poverty line, are calculated on the basis of the matrix of flows. A classical mobility index often used in practice and calculated based on the matrices of flows is the Shorrocks index (1978), described with the following formula:

$$M^s = \frac{n - tr(\mathbf{N})}{n}, \quad (27)$$

where:

$tr(\mathbf{N})$ – trace of the matrix of flows⁴,

whereby:

$n_{jj',t-1,t}$ – number of households which in period $t-1,t$ moved from the status of being below or above the poverty line j to status j' .

Index (27) may have the value from the range of $[0,1]$. The higher the value of the index, the greater the mobility of the households.

When decomposing index (27), and expanding its analytical capacities, we obtain the following:

$$M^s = \frac{n - tr(\mathbf{N})}{n} = \frac{\sum_{j>j'} n_{jj'} + \sum_{j<j'} n_{jj'}}{n} = \frac{\sum_{j>j'} n_{jj'}}{n} + \frac{\sum_{j<j'} n_{jj'}}{n} = M^{s+} + M^{s-}, \quad (28)$$

The first of the components on the right side of the equation indicates the percentage of households which moved above the poverty line in the comparable periods. The second component of the sum is the percentage of households which moved below the poverty line in the studied period. As a supplementation for mobility index (11), T. Panek (2001) proposed the index of the character of the households' mobility:

$$CM = \frac{\sum_{j>j'} n_{jj'}}{n} - \frac{\sum_{j<j'} n_{jj'}}{n} = M^{s+} - M^{s-}, \quad (29)$$

This index may have the value from the range of $[-1; 1]$. Its positive values mean that the flows of households in the direction above the poverty line prevail. On the other hand, its negative values mean that the flows of households in the direction below the poverty line prevail. The higher the absolute value of the index, the greater the prevalence of one type of flows over the other.

4.5. Determinants of poverty

A widely used method of establishing the sources of poverty divides the researched population into groups according to selected social and economic features, and then assesses this phenomenon inside these groups by means of poverty indices most often by means of the percentage of the poor. High values of the poverty index in the given group of households, with a concurrent high diversity of such values between the groups under the given classification suggest that this variant of the feature characterising the selected group of households generates poverty.

However, the assessments of the impact of specific variables on generating poverty may independently be biased since the relation of such variables with other variables is not taken into account. For example, high values of poverty index in the group of rural households indicate that living in the countryside

⁴ Values on the diagonal of the matrix, i.e. the number of households, which have not changed their poverty sphere status in the periods under comparison.

generates poverty. However, a high value of poverty index for this group of households is a combined effect not only of the place of residence, but also of other factors; e.g. a higher number of children in rural households in comparison to urban households, a lower level of education of the members of such households in comparison with the households from the cities. Thus, in order to specify the determinants of poverty necessary to estimate the “net” impact of specific variables on generating poverty requires the application of multidimensional methods of analysing correlations and the multiple regression in particular.

In order to specify the impact of the features underlined in the study on the degree of the risk of poverty, probit or logit models may be applied (Greene, 1997). In these models, the dependent variable is the marker variable which has the value of 1 if the household was below the poverty line and otherwise the value of 0.

The probit model may look as follows:

$$\Phi^{-1}[p(\mathbf{X})] = r_0 + r_1 X_1 + r_2 X_2 + \dots + r_k X_k + v, \quad (30)$$

where:

\mathbf{X} – vector of the potential determinants of poverty (explanatory variables),

$p(\mathbf{X})$ – probability of the household’s falling below the poverty line, in a specified set of potential determinants of poverty (independent variables),

$-1(p)$ – inverse cumulative standard normal distribution function

– the rest of the model.

The explanatory variables included in the models as the potential determinants of poverty may be presented, similarly as the explanatory variable, by means of a set of binary variables. When estimating the models with the sets of binary variables, in each such set one of the marker variables (variants of the feature) is omitted in order to avoid multicollinearity. This means that the parameters next to the independent variables of the model are relative indicators of the risk of entering the poverty sphere. The higher the positive value of the parameter next to the given variable (variant of the feature), the higher the risk of falling below the poverty line among the households displaying this feature variant, in comparison with the households whose model does not contain this feature variant. On the other hand, the negative value of the parameter next to the given variable (feature variant) indicates a lower risk of falling below the poverty line (in relation to the omitted feature variant).