

SN 2214

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VOLUME 2

QUESTIONNAIRES

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1. THERE ARE SOME 12
NEW OR RESTYLED QUESTIONS
ON THE SCHEDULES FOR 1985

2. NOTE THAT SOME QUESTIONS
HAVE BEEN RE-ARRANGED
FOR 1985 ON BOTH THE
HOUSEHOLD AND INCOME
SCHEDULES.

3. THESE INSTRUCTIONS HAVE BEEN
PARTIALY RE-WRITTEN FOR 1985
A LINE IN THE LEFT HAND MARGIN
INDICATES A CHANGE FROM THE 1984
INSTRUCTIONS OR A NEW
INSTRUCTION FOR 1985

Of all the many surveys the Social Survey has conducted, the Family Expenditure Survey is probably the most widely quoted in the House of Commons and the most widely used by government departments as a basis for economic policy decisions. It is a continuous survey which the Social Survey has conducted since January 1957 for the Department of Employment.

Although the FES has many uses, its primary function is to provide data which forms the basis for the annual revision of the expenditure 'weights' of the Index of Retail Prices. This index, which measures the change in the prices of the goods and services bought by households, is published monthly in the Department of Employment 'Gazette' and is quoted widely in the press and on television.

Useful Points to Get over to the Public

- a. This survey is carried out in connection with the annual revision of the expenditure weights for the Index of Retail Prices. It provides a list of goods and services used by most households and the proportions ('weights') each represents in the 'average family' budget. To compile the RPI, a representative selection of items is priced each month by the Department of Employment and the 'average family' budget is recalculated to see how much more it is costing to buy the same quantity of goods and services.
- b. The RPI is an essential component of the Tax and Price Index (the TPI) which combines into a single index the changes in both direct tax and retail prices. The quantity of goods and services which people can buy depends on two factors, namely (i) their residual income after paying income tax and national insurance contributions and (ii) retail prices. The TPI encompasses both these factors whereas the RPI reflects only price changes.
- c. Of particular interest to the elderly is the fact that the survey provides data on pensioner household expenditure, ie, the two Retail Price Indices for one-person and two-person pensioner households of limited means. These indices show how pensioner households are affected by price changes and help form the basis for policy decisions to improve pensioner benefits. Pensioner benefits are uprated each year in relation to the RPI.
- d. Departments other than the Department of Employment use the FES as the only continuous source of information on household expenditure and income.
- e. The survey shows to what extent different types of households contribute to the State in Income Tax, Value Added Tax and other taxes. It also demonstrates the ways in which these households benefit from such things as education, pensions, and social services (H M Treasury and Central Statistical Office).

The following are some recent examples of uses of the FES by government departments.

1. To examine expenditure on bus fares, train fares and private cars by households with different income (Department of Transport).
11. To examine consumption and expenditure on gas and electricity by households at different income levels (Department of Energy).

- iii. To provide data on consumers' expenditure and income for different regions, eg Wales, the South East (Central Statistical Office).
- iv. To study resources and needs of two and one-parent families and the costing of child and family benefits (Department of Health and Social Security).
- v. To study the take-up of means-tested social security benefits (Department of Health and Social Security).
- vi. To study the take-up of rent and rates rebates (Department of the Environment).

A handout of quotes from Hansard which illustrate the uses of the FES other than the RPI is provided separately. These can be used as and when you feel they may be of interest to informants.

- f. Some further examples of the uses of the RPI are:-
 - i. Certain pension schemes are linked to the RPI.
 - ii. Certain investments like SAYE and some National Savings certificates are linked to the RPI.
 - iii. The Office of Fair Trading carries out studies in instalment credit using the FES as its source.
 - iv. The FES provides analyses of household income and expenditure to Royal Commissions.
 - v. Consultants and other bodies engaged in market research use the FES to examine patterns of expenditure on particular types of goods and services; (they can then advise clients on the likely size of markets for particular goods).

The sample of addresses is drawn from 56 local authority districts each month. In the course of a year each of these districts is used four times at three - monthly intervals and is then replaced. The districts are rotated in such a way that 14 of the 56 districts are replaced by new selections each month.

Altogether 168 districts are covered in a quarter and nearly 300 in 12 months.

The addresses are selected from a different ward on each of the four occasions that the district is used.

Over 10,500 addresses are selected each year.

Address List

2.2

The sample for each area consists of a list of 16 addresses taken from the Electoral Register. FES RELATES ONLY TO DOMESTIC HOUSEHOLDS IN RESIDENCE AT THE GIVEN ADDRESS AT THE TIME OF THE INTERVIEWER'S FIRST CALL. The address list however, contains surnames, but these are included only as a further indication of the correct address. If the people shown on the address list have moved, you should interview whoever is living at the sampled address now.

The address means the address exactly as defined on the address list, so that if the latter refers to a specific flat in a large house or block of flats, it is only the specified flat with which the survey is concerned. In general an address will contain only one dwelling or part of a dwelling, but sometimes the sample address will cover several dwellings (eg a street in a rural area where there are no house names or numbers).

Counting Households at Address

2.3

At each address you should try to find out how many households are present at your first call. If you find an empty flat, do not include it in your list. This is essential for your sampling procedure at multi-household addresses.

In some cases it will not be possible to determine the exact number of households (as defined in the FES), eg. the address has a number of flats with separate entry-phones. In such cases, the best you can do is to list the number of doorbells.

Address Empty at First Call

2.4

Count an address as empty on the first call at which you discover it is empty. Do not recall even if you know a household(s) will be moving in later in the month.

Multi-household Addresses

2.5

Most sampled addresses will contain just one household, but sometimes you will come across multi-occupied addresses. This may occur, for example, when the sampled address is that of a block of flats and the Electoral Register did not list each

flat separately. Another example occurs in some rural areas where several houses may all have their address given as 'The Street'. 'The Street' will be a multi-occupied address. Though it is sometimes possible for the Sampling Implementation Unit (SIU) to identify multi-households from the Electoral Register (see 2.7 below), this is not always possible, and sometimes you will find an address which contains more than one household for which you have been given no warning. (Concealed multi-households). Therefore you should familiarise yourself with the procedure before visiting any addresses.

Concealed Multi-households

2.6

Where you find you have a concealed multi-household you should take the top sheet off your pad of pink CONCEALED MULTI-HOUSEHOLD SELECTION SHEETS. Insert the serial number for the address concerned on the front of the sheet and list all the households living there at your first call. The listing procedure will vary according to the particular layout of the address but it must be carried out in the way described below so that you (or another interviewer on a follow-up) can re-identify the household(s) that will be selected:

If the address consists of numbered flats you should simply list them in numerical order, starting with flat 1, 2, 3, etc.

If the address consists of unnumbered flats or bedsitters, whether in a block of purpose-built flats, a tenement, or a converted house, you should list the flats in a systematic way, starting with the lowest floor and working in a clockwise manner on each floor (see the sample on page 9).

Exclude from the list any flats that are known to be empty.

On the back of the sheet there is a selection table telling you which households to interview, according to the number you find at the address. Ring the numbers of the selected households in the left hand column on the front of the sheet.

Returning Concealed Multi-household Selection Sheets: Please do not wait to enter the outcome codes for all the selected households in the right hand column on the front of the Concealed Multi-household Selection Sheet, but attach the sheet to the Record(s) of Calls and Contact for the first completed household at that serial number, for return to the office.

Pre-sampled Multi-households

2.7

There are two types of pre-sampled multi-household procedures; the general procedure, and a procedure used in Scotland to overcome the difficulties of large tenement blocks.

General procedure for selecting households for interview:

An attempt is made to identify multi-household addresses from the number of surnames on the Electoral Register. Any address with four or more surnames is treated as a pre-sampled multi-household address and indicated in the right hand column of your address list by 'MH' together with the number of surnames on the Register. However, this is not a foolproof indicator of the number of households living at the address, so you are asked first to determine the exact number by listing them and then to select the household(s) to be interviewed, using the table provided.

For each pre-sampled multi-household address you will find a sheet attached to your address list, (headed 'PRE-SAMPLED MULTI-HOUSEHOLD SELECTION SHEET'). The serial number for that particular address will be written at the top of the sheet and it is essential that you use the correct sheet for each pre-sampled multi-household address so that households are given their correct chance of selection. An example of the selection sheet (front and back) is shown on pages 11 and 12.

On the front of the Pre-sampled Multi-household Selection Sheet you should list all the households living at the address at the time of your first call, using the listing procedure explained above (2.6).

On the reverse side of the Pre-sampled Multi-household Sheet there is a selection table telling you the range of households we expect to find at the address. Against each number in the range is the number of the household(s) you are to interview (see the example on page 12). These numbers are not the household numbers that you will eventually use on your Schedules. (See page 31).

In the example, nine households were found, so, reading from the table provided, you see that household number 3 on the list is to be interviewed, ie the household occupying the flat on the ground floor front, right hand side. Ring the number of the household selected - in this case number 3 - in the left hand column on the front of the selection sheet.

If there were fewer than five households at serial number 05, no interview would be required and you would simply return an Interview Record and a Record of Calls and Contact for serial number 05, coding outcome - 'No sample selected at the address'.

If there were ten households at this serial number, you would have to interview two households, numbers 1 and 8 on your list.

However, it is rare for you to be instructed either to complete no interview at a specific address, or to carry out more than one interview. ie in the vast majority of cases, the selection table for a pre-sampled multi-household address will instruct you to interview one household only.

Special Cases (pre-sampled Multi-households)

2.8

a. Selected unit is empty or ineligible

Although you should not include any empty accommodations on your list, at some addresses (eg a block of flats) it may not always be possible to tell whether a flat is empty or not. If you find that the flat you selected for interview by using the table on the Pre-sampled Multi-household Selection Sheet is empty or ineligible, you should treat it as you would any other empty or ineligible accommodation - ie no interview is conducted.

The relevant outcome code should be entered on the Record of Calls and Contact and on the Pre-sampled Multi-household Selection Sheet.

b. Selected unit contains more than one household

Occasionally you may find that your chosen flat contains more than one household - ie it is a 'concealed' multi-household within a pre-sampled multi-household address. In this case you should follow the procedure described at 2.6 above.

Returning Pre-sampled Multi-household Selection Sheets: Please return the selection sheet attached to the Record(s) of Calls and Contact with the first completed household at the address or as soon as possible if no household has been selected.

Vague Addresses (Pre-sampled multi-households)

2.9

Very occasionally, in rural areas, the sampled address may be rather vague, eg. 'The Street, and you may have difficulty deciding which houses or households belong to your address. To help you sort out this type of address (which will nearly always be a pre-sampled multi-household address) you will find a VAGUE ADDRESS FORM attached to your address list. This form is headed with the serial number for that particular address and tells you (on the front) what to include and (on the back) what to exclude. An example of the form (front and back) is given on page 15.

You should go along the street, first up one side and then down the other, and list on the relevant Pre-sampled Multi-household Selection Sheet all the house names and/or numbers which are to be excluded, (except those shown on the back of the Vague Address Form.) (If there is no house name or number, give a description sufficient to enable re-identification).

Having listed the houses to be included in the vague address, use the table on the back of the Pre-sampled Multi-household Selection Sheet to find which household(s) to interview. Ring the selected number(s) in the left-hand column on the front of the selection sheet.

Returning the forms. Again, you should not wait to enter the outcome code for all the selected household(s) in the right-hand column on the front of the selection sheet, but please return both the Pre-sampled Multi-household Selection Sheet and the Vague Address Form, having attached them to the Record(s) of Calls and Outcome for the first completed household at the address.

Scotland (pre-sampled multi-household) - Introduction

2.10

A major problem can arise with the Electoral Register in Scotland, regarding large tenement blocks, which appear merely with the number of the house, the street name, and a long list of surnames.

To avoid making unnecessary calls at these addresses, the valuation lists at the Rating Office are used to sample one unit of the accommodation where possible.

On the valuation lists tenement blocks are listed as a number of rateable units each described separately as 'house', 'apartment house' 'service flat' etc.

Example: Address 87 James Street

Entry on valuation list:

House	87 James Street	Gordon	Gr.1
Flat	87 James Street	Kane	Gr.2
House	87 James Street	McKendrick	1/1
House	87 James Street	Haydon	1/2

For each Scottish pre-sampled multi-household address you will be issued with two forms: a blue RATEABLE UNIT SELECTION SHEET and the usual PRE-SAMPLED MULTI-HOUSEHOLD SELECTION SHEET described at 2.7 above. There is an example of the Rateable Unit Selection Sheet on pages 13 and 14.

Scotland (pre-sampled multi-household) - Rateable unit selection procedure 2.11

When you have found the address at the Rating Office, enter the details as they appear on the valuation list in the box on the front of the Rateable Unit Selection Sheet. Be sure to copy down the number or location of each rateable unit so that you (or another interviewer on a follow-up) can subsequently identify the rateable unit that will be selected.

On the back of the Rateable Unit Selection Sheet there is a selection table for a range of numbers corresponding to the number of rateable units you may have found. Against each number in the range is the number of the rateable unit(s) at which you are to interview (see the example on pages 13 and 14).

In the example, four rateable units were listed, so, reading from the table provided, you see that rateable unit number 1 in the list is to be contacted, i.e. the household occupying the "house" at Gr.1 (Ground floor No. 1). Ring the number of the rateable unit selected - in this case number 1 - in the left-hand column on the front of the Rateable Unit Selection Sheet.

You may find that the number of rateable units is too small for one to be selected. In this case an instruction printed on the Rateable Unit Selection Sheet will tell you to either:

- a. Visit the address and carry out the usual procedure, i.e. list all the households at the address on the Pre-sampled Multi-household Selection Sheet provided for that address and select the household(s) to be interviewed using the selection table on the reverse.
- b. Carry out no interview at the address. In this case you need not visit the address at all. Code as 'No sample selected at the address'.

Occasionally you may find that the selection table indicates that you should carry out interviews at two or more rateable units. Interview at any unit so selected.

Scotland - Special Cases

2.12

- a. Empty or ineligible units: Any units that appear on the valuation list as vacant should be included in your listing because they may have become occupied since the valuation list was compiled. However, if a unit is marked 'derelict', exclude it from your listing. (Property with no rateable value is often derelict, but you should check with the officer at the Rating Office before excluding such property).

Units on the valuation list which are non domestic or commercially rated (eg. shops, surgeries and workshops) should be excluded from your listing.

It is clear that in some cases the units selected will turn out in the field to be empty or ineligible. Treat them as you would any other empty or ineligible accommodation - i.e. no interview is required.

- b. Selected unit contains more than one household: Occasionally you may find that the selected rateable unit contains more than one household - ie. it is a concealed multi-household. In this case you should follow the procedure described at 2.6 above.

Returning Scottish Selection Sheets: Please return all sheets attached to the Record(s) of Calls and Outcome for the first completed household at the address, or as soon as possible if no household has been selected.

Extra Interviews per address and quota

2.13

At any one address no more than 3 households should be dealt with

For practical reasons (ie in order to prevent a quota of addresses containing a lot of multi-households from becoming unmanageable in the field), there is a ceiling of 20 on the number of households/addresses to be dealt with.

In counting these 20 you should include all addresses already reported on your Weekly Progress Return (S835H) (ie coded 1, 3-7) together with any extra households picked up at multi-household addresses, and all households coded 9. You should include any already returned as empty. However, you should not count in the 20 any addresses returnable as 2 (no sample selected at address), since over the whole sample they, in theory, counterbalance the extra households selected at multi-household addresses.

So, in any one quota, no more than four extra households should be dealt with whether they come from pre-sampled or concealed multi-household addresses. For example, if two concealed multi-household addresses each produce the maximum of three households, then that is the four extra households. At every address after that you should select one household only, in the following manner:

- At pre-sampled multi-household addresses you will usually have only one household to interview, but if your Pre-sampled Multi-household Selection Sheet instructs you to interview two households then you should take only the first. In the above example (see page 6), if there were ten households at serial number 05, you would interview only at the household numbered 1 on your list.
- At concealed multi-household addresses you should take the first household that the selection table instructs you to interview.

NOTE - Where you are interviewing more than one household at an address, always try to do all the interviews in the same week in order to prevent second-hand versions of the survey being passed from one household to the next.

- If you have any problems in applying multi-household procedures, please ring the Field Officer for advice.

CONCEALED MULTI-HOUSEHOLD
SELECTION SHEET

AREA	1	0	6
Ser. No.		1	2

List of Households

N/Hld No	DESCRIPTION OF HOUSEHOLDS eg. Location and Surname if available	OUTCOME CODE Transfer from C & C/C & O sheet
①	Room, basement (Black)	9
②	Room, Ground left (Jones)	9
3	Room, Ground right (Davis)	
④	1st floor/2nd floor (Nelson)	7
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		

IF MORE THAN 22 HOUSEHOLDS
RING SAMPLING GHS 2356
FES 2335

Procedure

1. Note down the households on the table above. This must be done systematically. Start at the lowest floor and work in a clockwise direction.
2. Turn the sheet over for the table showing households to be interviewed. On the front of the sheet ring the number of the selected households.
3. Finally transfer code for Calls and Contact/Outcome sheet to 'outcome' box.

EXAMPLE OF BACK OF CONCEALED MULTI-HOUSEHOLD FORM (pink)

Selection Table

NUMBER OF H/HLDS FOUND AT THAT ADDRESS	INTERVIEW AT HOUSEHOLDS NUMBERED
2	1,2
3	1,2,3
4	1,2,4
5	2,3,5
6	2,4,6
7	1,2,5
8	3,4,6
9	1,3,8
10	1,4,5
11	3,4,8
12	5,7,8
13	4,6,9
14	3,4,11
15	5,10,14
16	6,11,15
17	3,5,12
18	1,2,7
19	9,10,18
20	4,5,10
21	7,14,19
22	1,17,20

PRE-SAMPLED MULTI-HOUSEHOLD
SELECTION SHEET

AREA	1	0	6
Seq No		0	5

List of Households

H/Hld No	DESCRIPTION OF HOUSEHOLDS eg. Location and Surname if available	OUTCOME CODE Transfer from C & C/C & O sheet
1	Ground floor, front, left hand side	
2	Ground floor, back	
3	Ground floor, front, right hand side	9
4	1st floor, front, left hand side	
5	1st floor, back	
6	1st floor, front, right hand side	
7	2nd floor, left hand side (Facing back of building)	
8	2nd floor, right hand side	
9	Attic room	
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		

IF MORE THAN 22 HOUSEHOLDS
CONTINUE ON SEPARATE SHEET

Procedure Note down the households on the table above. This must be done systematically. Consecutively numbered flats are put down in order. If unnumbered, start with the lowest floor and work in a clockwise direction thus -

1. GROUND FLOOR, FRONT, L.H. SIDE
 2. GROUND FLOOR, BACK
 3. GROUND FLOOR, FRONT, R.H. SIDE
 4. FIRST FLOOR, FRONT, etc
- NB Exclude empty flats

Turn the sheet over for table showing household(s) to be interviewed. On the front of the sheet ring the number(s) of the selected household(s). Finally transfer code from Calls and Contact/Outcome sheet to 'outcome' box

EXAMPLE OF BACK OF PRE-SAMPLED MULTI-HOUSEHOLD FORM (WHITE)

Selection Table

NO OF SURNAMES - 7

NUMBER OF H/HLDS FOUND AT THAT ADDRESS	INTERVIEW AT HOUSEHOLD(S) NUMBERED
1	No interview
2	No interview
3	No interview
4	No interview
5	4
6	3
7	3
8	1
9	3
10	1,8
11	1
12	3,11
13	12,13
14	7,12
15	11,15

If the number of households found is more than 16 please telephone sampling for instructions.

GHS 2366
FES 2335

WP 1001- 10258

EXAMPLE OF FRONT OF RATEABLE UNIT SELECTION SHEET (BLUE)

GHS/FES

TO BE RETURNED TO FIELD WITH
CALLS & CONTACT/OUTCOME SHEET

RATEABLE UNIT SELECTION SHEET

AREA	1	7	2
Ser. No		0	6

List in box below all entries on ratings list within the selected address.
IF THERE IS ONLY ONE ENTRY THEN USE NORMAL PRE-SAMPLED MULTI-HOUSEHOLD
PROCEDURE

Rateable Units No:	Entries on Ratings List	OUTCOME CODE Transfer from C & C/C & 0 sheet
①	House Gordon Gr 1	9
2	Flat Kane Gr 2	
3	House McKendrick 1/1	
4	House Haydon 1/2	

Procedure

1. Copy descriptions of rateable units at the address onto the table above.
2. Turn the sheet over for the table showing the rateable unit(s) to be contacted.
3. Ring the number(s) selected on the table above.
4. Transfer code from Calls and Contact/Outcome sheet to outcome box.

EXAMPLE OF BACK OF RATEABLE UNIT SELECTION SHEET (BLUE)

Rateable Unit Selection Table

NO. OF SURNAMES
ON ELECTORAL REGISTER - 4

HIGHEST NUMBER ALLOCATED	SELECT NUMBER(S)
1 2	Do not select a rateable unit. Visit the address and use the usual pre-sampled multi-household procedure
3	3
4	1
5	1
6	5
7	5,6
8	2,8
9	2,9
10	2,3,6
11	3,7
12	1,10,11
13	2,3,11
14	2,5,14
15	1,8,10
16	2,3,14
17	7,9,11
18	4,8,15
19	7,13,15

If you are instructed not to select a rateable unit, but to use the usual pre-sampled multi-household procedure, then go to the address and list all the households living there on the pre-sampled multi-household sheet that has been supplied for this address. Select the household(s) to be interviewed in the normal way. If no interview is required, do not visit the address at all.

VAGUE ADDRESS FORM

Front

Area code number 072

Address serial number 06

THE STREET
HAMBLETON

The address we have given you is somewhat vague and you may have difficulty deciding what to include and exclude as part of this address.

If you find any accommodation at the given address other than that listed below or overleaf it should be included also.

INCLUDE all households at the accommodation currently or previously occupied by the following persons (at the time when Register from which we sampled these addresses was compiled).

Smith Ellen
" Stanley
Watson, Andrew
" Marjorie
West, Harry
" Sarah
Wilson, Michael
" Pat

PTO

Back

EXCLUDE the households at the following addresses. The surnames on the current Electoral Register are given in brackets.

SOUTH VIEW, THE STREET (Norton)
WAYSTONE COTTAGES, THE STREET (Ransome)
WHITEHOUSE, THE STREET (Thompson)
BARMEAD, THE STREET (Thwaites)
2 COUNCIL HOUSES, THE STREET (Wayne)

WP 1001-10258

Sections 3.2 - 3.12 are concerned with definitions related to households, individuals and changes within households etc.

Excluded Addresses and Households

3.2

-
- a. FES is concerned with collecting information about domestic expenditure as opposed to business expenditure. Your address list may contain some commercial premises of the types listed below:

Public Houses

Hotels of all types

Guest Houses/Commerical Boarding Houses.

Private Households containing 4 or more boarders at your first call.

Institutions eg hotels, schools, prisons, hospitals,
religious "Establishments".

However you must visit address of the type listed above to check whether or not there is any completely separate accommodation where the household is responsible for all its own domestic expenses; then it will be classed as a Domestic Household and included in the Survey. Of course this must be within the address as given on the address list.

- b. Also Exclude households containing

- i. Members of the Diplomatic Services of any country (except UK).
- ii. Members of the USA Forces (other United States citizens can be included).
- iii. Roman Catholic Priests if they are living in accommodation provided by the parish church.

In cases of doubt as to whether or not a household should be included or excluded, telephone Field Branch BEFORE COMMENCING THE INTERVIEW.

Households - Special cases for inclusion

3.3

-
- a. Households which will be moving should be included in the survey provided either:

- i. the households will be living at the selected address for at least three weeks from the first contact,
- ii. travelling to the new address does not involve a separate journey of more than 30 miles for the interviewer.

- b. Where a household has a main residence abroad and a temporary residence in Great Britain and the temporary G.B. residence is sampled, then the household should be included in the F.E.S, if it will be at that address for at least one calendar month from original contact.

This includes cases where the selected address is a caravan or houseboat.

Cafes where the proprietor's family lives over the cafe, stewards of private clubs and publicans 3.4

Exclude if all or most of the household's meals are provided by the cafe, club or pub, etc. Any other borderline cases should be referred to the office for a decision.

Household Definition 3.5

A household comprises one person living alone or a group of people living at the same address having meals prepared together and with common housekeeping provided that:-

- i. All persons in a household consider the address to be their only or main residence. The household would include 'absent members' who consider the address to be their main residence. MAIN RESIDENCE is as defined by the informant(s).
- ii. All persons in a household share at least one meal a day when in residence.
- iii. The household has exclusive use of at least one room. eg. If two people share one room and neither has the exclusive use of at least one other room, they should be treated as one household, even if they do not share one meal a day.

All three conditions must be satisfied. (This differs from the standard SSD definition). Quite separately from those who qualify as above, count as members of the household:-

- a. Visitors staying temporarily with the household and others who have been in the household for only a short time provided they will be staying with the household for at least one month from the starting date of records.
- b. Children 16 or over normally away at an educational establishment for educational purposes spending the holidays at home, who are at home during the entire record keeping period.
- c. A child under 16 away at boarding school but who normally spends holidays at home, to be counted as a member even during term time.

Note that a) and b) override condition i) above, ie visitors will not consider the sampled address to be their main residence and children over 16 normally away may not consider the sampled address their main address. Nevertheless both these cases should be included, as the presence of visitors (staying one month) and children home from holidays can influence household expenditure.

HEAD OF HOUSEHOLD DEFINITION

Please refer to page 62 'Handbook for Interviewers' for standard definitions of this term but remember to apply it to the household as defined for FES in preceding Section 3.5

HOUSEWIFE DEFINITION

From 1985 the Housewife does not have to be identified.

Spender Definition

The definition of a spender depends on age and not on whether the individual has or actually spends money. Hence every member of the household who has passed their 16th birthday is a spender, with the following exceptions:

- a. a mental defective, or someone who is senile (note: blind persons and permanent invalids are eligible as spenders)
- b. someone who cannot be interviewed or keep records because of absence from the household for at least 7 days from the date of contact.

Applying the Definition of Spender in varying Circumstances

Difficulties in applying the spender definition can occur as a result either of absence of spenders or of changes in the household composition during the record keeping period.

Such situations are dealt with below:

Absences of spenders

- a. Absence of a spender for less than 7 days from initial contact.

If a household member eligible as a spender is absent at the initial contact but returning within 7 days and within the placing period of the survey, delay the explanation and interview until they return, in order to be sure that they will co-operate.

- b. Absence for longer than the first 7 days

If the person is a household member and is absent at the initial contact and NOT returning within 7 days, details of the person should be entered in the household box on page 1 of the household schedule, and a note explaining why the person is being counted as an absent spender should be included in the box at the foot of page 1 of the household schedule. Also, an income schedule is to be completed as far as practicable (see para (c) page 57).

c. Absence of spenders at the end of the record keeping period

(i) IN THE UK

If any or all spenders know that they are going away after the start of record-keeping, ie on holiday, or business or for any other reason, attempts should be made to persuade the member(s) to keep records while away. The records should be posted back to the interviewer at the end of the period if the spender concerned is not due to return to the household within the survey period. (Also see D.12 page 87).

If the records are being returned by post, the information about names and addresses (see para. 5.7) must be collected at an earlier call so that the £5 postal orders can be sent.

(ii) ABROAD

If any or all of the spenders know that they are going abroad after the start of record keeping, ie on holiday, or business or for any other reason they should be asked to keep the record up to time of leaving the air/seaport.

They should note the period of time they will be abroad along with the amount (in £ equivalents) taken abroad and a rough estimate of how much they expect to spend abroad during their visit.

If the records are being returned by post, the information about names and addresses (see para 5.7) must be collected at an earlier call so that the £5 postal order can be sent.

d. In addition where the absent member is a spouse:

- i. Details of any regular allowance paid by the absent spouse to anyone present in the household should be shown at Q 80 on the income schedule in addition to the other income details shown on the schedule.
- ii. If the spouse present in the household draws money from a joint bank account, the amount drawn from the account for housekeeping and other expenses, plus any cheques written on the account, should be shown at Q 80 on the Income Schedule.
- iii. Also note on the Income Schedule at Q 80 any amounts the absent spouse pays directly or from their own or from a joint account.

Money received from spouses who are not household members

If a spouse considers him or herself to have their main residence away from the sampled address, (and therefore is not a household member), please try to obtain (i) - (iii) above.

Information required about 'non spenders'

3.10

-
- a. If the person is a household member but does not qualify as a spender (eg, senile, or away less than a month but not returning within 7 days) details of the person should be entered in the household box on page 1 of the household

schedule, and a note explaining why the person is not a spender should be entered in the box below column 10. An income schedule should be completed, as far as is practicable, (see para (c) page 57).

- b. If the person is not a household member, information is not required in the household box or throughout the household schedule. Any allowance from a non-household member to a household member must be recorded in the household member's income schedule at Q 79. (EXCEPT WHERE THE NON-HOUSEHOLD MEMBER IS A SPOUSE OF A HOUSEHOLD MEMBER, IN WHICH CASE ALLOWANCE SHOULD BE ENTERED AT Q 80).

ANY OTHER CASE SHOULD BE REFERRED TO FIELD BRANCH WHO WILL ASK THE RESEARCH OFFICER FOR A RULING

Changes in household composition during the record- keeping fortnight 3.11

The household composition on the household schedule page 1 should be the situation as it is at the time of the main interview. Changes after that date should be noted on page 37 of household schedule. Some special cases are:-

- a. Someone expected to join or leave the household for at least a month within 7 days from first contact - main interview and start of record books should be delayed until the change has taken place.
- b. Someone expected to join household for at least a month, but later than 7 days from first contact - the new member should be ignored, but a note should be made on page 35 of the household schedule.
- c. Someone expected to leave household permanently, but later than 7 days from date of interview - he must be included in the household and asked to complete record books for 14 days and, if necessary, to arrange for them to be posted to the interviewer. If this is not done the household may be regarded as a refusal and should be referred to the office for a decision about the payment of the £5.
- d. Spender leaves unexpectedly - If possible he should be asked to continue record keeping for fourteen days. The rest of the household should also continue keeping record books. Payment will be made to all spenders who have completed their record books for fourteen days. A note is required on page 35 of the household schedule stating the circumstances.
- e. Someone unexpected joins household during the record keeping period - the new member should be ignored but a note should be made on page 37 of the household schedule.

Member too ill/taken into hospital after starting records - provided his interview information and records up to the time of illness/hospital are complete and the rest of the household continue until the end of 14 days, payment will be made to each spender including the one ill/in hospital.

a. Death of a spender

- i. If the rest of the household continue to record-keep to the end of the 14 days and the information for all members, including the one who died, is complete, together with his record book up to the time of death, payment will be made to all surviving members, but a separate note must be attached to household schedule, page 1.
- ii. If the rest of the household do not continue with the record books, all documents relating to the household must be returned with a separate note attached to household schedule page 1: no under-taking may be given as to payment; this is at the discretion of the FES research unit.

Collecting expenditure information from households recently moved, or formed

3.12

Where the head of household has recently moved to their present address it may be that telephone, gas, electricity bills, etc may not have been received for the new address. In these circumstances you should collect information about the last account/advice paid at the previous address, rather than obtain an estimate of what the new bill will be. Where the household is newly formed, eg. marriage, and no bills for current accommodation are available and the household had no previous accommodation, note this fact and obtain an estimate of expenditure if possible.

SPACING OF PLACING CALLS OVER THE FIELDWORK PERIOD

4.1

Fieldwork must be carried out at a steady rate throughout the month. For this purpose each calendar month is divided into four placing weeks of 7 or 8 days as follows:-

Placing Week	All months except February	February
1	Days 1st to 7th inclusive	1st to 7th
2	" 8th to 15th	8th to 14th
3	" 16th to 23rd	15th to 21st
4	" 24th to end of month	22nd to end

Fieldwork in each area will be extended another two or three weeks after the end of the placing month assigned to the area, while the intermediate and final calls are completed.

- a. Four addresses should be dealt with in each of the four placing weeks. These four addresses can be in any order and should be grouped with economy in mind.
- b. It may happen that in the first placing week there is no reply at an address after several attempts, or it may not be possible to get an appointment for an

interview in that week with a particular household. In such a case, proceed to the fifth address and if necessary to subsequent addresses, until four have been dealt with in the first placing week.

- c. The second placing week begins by calling first on those who were visited in the first placing week but who have not yet been interviewed or otherwise completed. Then further addresses are called on, until a further four households have been dealt with. Similarly the third placing week begins by visiting all those left undecided at the end of the second placing week and, after these have been tried again, further addresses are called on. The fourth and last placing week begins by visiting all those undecided in the previous week, and, after these have been tried again, any addresses remaining must be called on.
- d. Where an address contains concealed multi-households, the selected households should all be dealt with in the same placing week, even if this results in 5 or 6 households being included in the weekly quota instead of the usual 4.
- e. Where a called-on address is not contacted or dealt with in a particular placing week, the address is revisited week after week and only written off as a non-contact at the end of the final placing week. The address should be revisited each week so that the delay between the original contact and the actual starting date is kept as short as possible.

Extension of Placing Interviews beyond the month

4.2

All serial numbers must be called on before the end of the field period. If any serial number cannot be contacted or interviewed during the field dates but is likely to be available within the first week after the end of the field period, it is possible for an interviewer to carry on up to a maximum of 7 days.

Before proceeding the interviewer must ring the Field Branch (i) for permission to carry on and (ii) to find out for exactly how many days she can carry on.

Weekly quota of four - what is included

4.3

Include:

- a. households who have been interviewed and definitely promise to begin keeping records in the week,
- b. households who definitely refuse

The following are also counted as part of the weekly quota of four:-

- c. an address at which there is no household (empty/demolished)
- d. an establishment which cannot be included because it is not a domestic household, eg a hotel or boarding house
- e. a household moving out of reasonable travelling distance

- f. a household away and not returning until after the end of the placing month. The position should be verified and the addresses included in the last placing week. (See para 8.2 re weekly progress returns).
- g. multi-household addresses where Sampling have given a specific ruling that there is no household they wish you to interview.

In making a progress return to Field Branch, such cases are included in the week in which the outcome reported occurs.

The weekly quota of 4 does not include a household which was originally treated as co-operating in an earlier week but subsequently refused.

At each selected address, calls are first made to find out who is living at the address, and secondly to secure co-operation. The latter are the placing calls at which one conducts the interview and leaves records for self completion. At each household where records are placed, calls are made subsequently to ensure that the records are being kept satisfactorily, and to collect the completed records after the end of 14 days.

First Call

5.2

The purpose of the initial call is to establish, with any responsible adult:-

- a. how many households live at the selected address (FES household defined) (para 3.5, page 17).
- b. how many eligible people there are aged 16 and over within each household. (FES 'spender' defined para 3.7, page 18).

Try to arrange an appointment to see all spenders together. It is advisable to see them all together because if one member feels unable to co-operate then the whole household must be counted as a refusal.

Should it not be possible to see all spenders together, it is preferable to see HOH and wife together first. Other spenders not available at that time should be seen at one or more later calls.

When making first contact with one member of the household, be brief in what you say, as explaining the survey to only one spender can prejudice your chances of seeing the other(s) if that spender passes on a garbled version of the purpose.

The interview call

5.3

- a. When you have all (or the main) spenders present give the uses and purposes of the survey and other standard points of introduction. Before beginning the interview explain what information is required, ie. that the household will be asked to provide details of regular expenditure such as rent/mortgage, rates, insurance, etc. and that each individual will be asked to give details of his/her income and to keep a diary record of all money spent during a 2 week period, and also that in return for this each will receive a token payment of £5.
- b. Should only some spenders be present, it must be spelt out that co-operation is required of all spenders before any information can be used, or payment made.
- c. The detailed questions on household and income schedule should be dealt with first. Neither schedule may be left with an informant.
- d. Do NOT leave any Credit Card sheets and D schedules until all spenders have been interviewed.

Record keeping should normally begin on the day of the interview or the following day. Note that if the spender has a credit card, credit card sheets should be left for the weeks in which they keep records. The recording of credit card account payments must cover the same period as diary record keeping.

Delay in starting records should be avoided except in special circumstances. Delays over public holidays should be avoided if this can be done without losing co-operation; such delays may bias results because expenditure over holiday periods will be lost.

All members should start on the same day. A member should only be allowed to start on a different day when co-operation would otherwise be lost. THERE SHOULD ONLY BE ONE DAY'S DIFFERENCE BETWEEN STARTING DATES.

THE TWO RECORD BOOKS MUST FORM A SINGLE CONTINUOUS PERIOD OF 14 DAYS. IF THIS IS NOT POSSIBLE OR IN DOUBT PHONE FIELD BRANCH AS SOON AS POSSIBLE.

Before the first checking call:

5.5

- a. Look through the interview documents for completeness and consistency.
- b. Complete the checking schedule (as described on page 90).

While doing a) and b), note any items which need further probing, so that these can be asked about at the first checking call.

Checking calls

5.6

From 1983 there has been a change in the number and content of checking calls. To save field costs, it is recommended that the eight day checking call be entirely eliminated or reduced to a bare minimum. Obviously in cases where a respondent requires help it will be essential to make this call and this decision will be left to your own discretion (see calls and contact sheet). This change has been introduced as a result of the Rayner review, and is the only modification caused to FES field work by that review.

First checking call - made on or before the fifth day. At this call the following actions should be carried out

- a. Check how record keeping is progressing. Look carefully at all entries, probing and annotating any ambiguities that appear on records. Queries regarding items in records belonging to a spender not present at this call should be noted and details obtained when you next see him/her.
- b. Any regular commitments recorded in the record books should be cross checked on pages 2 and 3 of the checking schedule (K).
- c. Leave dated record books and credit card sheets (S835C) for the second week of record keeping.

Additional checking calls - at the discretion of interviewer

This should be made as early as possible after the end of the 14 day period. If it cannot be made at once the Field Branch must be told. THIS FINAL CALL MUST NOT BE DELAYED by more than a few days.

All record books and credit card sheets are to be checked then collected, and queries resolved if possible.

During the final call, after checking that all documents are complete, it is essential to explain further about the payment of £5. This will be paid by separate postal orders made out to each individual spender.

In order for payments to be made to the right people, it is ABSOLUTELY ESSENTIAL to check.

- a. the household's current postal address (with postal code if there is one)
- b. initials and surname of each household member who has kept records.

YOU MUST ASK YOUR INFORMANT FOR THIS INFORMATION AND ENTER IT CORRECTLY ON THE APPROPRIATE E FORM (See page 92). Addresses given on the electoral register are often incomplete, and names mis-spelt; this can result in postal orders never arriving and bad public relations. If informant is moving within 6-8 weeks also note new address.

When planning your work on FES you should bear in mind that at least half the cost is incurred by way of travelling time and expenses. It is therefore "essential to minimise the number of times you visit" an area by doing all you can to arrange appointments on the same day where this is practicable. When the scheduled 'fifth day' checking call coincides with a public holiday, it is more advisable to call on the third or fourth day, when the informants are more likely to be available. Similarly, make every attempt to arrange several collection calls together, especially those for the last week. A few days delay in collection will often not matter much, provided you explain the situation and make it clear when you will be returning. Obviously we must still rely on your judgement to decide when extra calls are needed. However, if you are worried by the conflict between quality and economy you should discuss the problem with the Field Officer.

At some stage during your contact with the household a purpose leaflet should be left. Generally the best time to hand the leaflet over is after all the eligible members of the household have been interviewed. If an informant refuses to make an appointment for you to see all the eligible persons without a full explanation of what is involved in the survey, you may need to make earlier use of the leaflet in your contact with the household. After giving your introduction, it is best to leave a leaflet rather than risk a garbled version being passed on to others in the household. However, in most cases it is suggested that you leave the more general 'Ask the People' leaflet at this stage. Supplies can be obtained with your general non-survey stationery orders.

£5 will be paid to each eligible household member aged 16 or over provided that he and all other household members (16+) co-operate by:

- a. Providing information for the household and income schedules.
- b. Keeping records for 14 days, and
- c. Completing S835C if appropriate.

FAILURE OF ONE HOUSEHOLD MEMBER TO CO-OPERATE, FOR EXAMPLE BY REFUSING TO ANSWER ANY QUESTION OR REFUSING TO KEEP DIARIES OR DISCONTINUING RECORD KEEPING, MEANS THAT THE INFORMATION FROM THE REST OF THE HOUSEHOLD CANNOT BE USED AND CONSTITUTES A REFUSAL FOR THE WHOLE HOUSEHOLD. PAYMENT OF £5 WILL THEN NOT BE MADE TO ANY MEMBER OF THE HOUSEHOLD. HOWEVER IF INFORMANT DOES NOT KNOW THE ANSWERS THIS IS ACCEPTABLE AND DOES NOT CONSTITUTE A REFUSAL.

Method of Payment

5.10

Each payment is made by postal order sent direct from Accounts Branch of OPCS. The interviewer should advise each person that it may be 3 or 5 weeks before the postal order arrives. Separate postal orders are sent where several members of the same household qualify, details of names and addresses for these being taken from the E form. All postal orders will be sent in one envelope unless the interviewer tells us this is inadvisable.

Re-visiting a household for further details after the final call

5.11

Completed schedules and records received by Field Branch are passed to the Primary Analysis Branch who carry out a number of checking operations. If there is any difficulty in coding an item the FES Research Unit are consulted. They make a decision as to whether further information is needed. This is usually done by direct correspondence between the FES Research Unit and the informant, but sometimes the schedules and query are returned to an interviewer via Field Branch for re-call. You should always mention to informants on the last call the possibility of such further contact. Another reason for asking for the correct names and addresses is so that letters to informants can be addressed correctly. Any recalls you are asked to complete should take priority over other work. Please contact the Field Officer if this leads to a conflict of interests. In many cases it may be possible for the recall to be completed by telephone.

Working away from home on subsistence

5.12

If your quota involves staying away from home on overnight subsistence, you should take extra care when planning and making appointments for interviews and checking calls. Your aim should be to keep the number of days away from home to a minimum.

In practical terms this means ensuring that your checking calls are congregated together (so the first call, for example, could be made between three and six days from the interview). Likewise with interviews: your aim should be to group interviews together. If you find that a calendar week (Monday to Friday) covers two placing weeks, eg the end of week one (up to the 7th) and the start of week two (8th-15th), then, rather than starting on the first of the month as you might otherwise do, you should aim to place eight interviews during that calendar week, as well as making any checking calls you can in that week, and then go home and not return to the area until you can again group some more calls together. And, of course, while you are in the area, you should be prepared to work long days (at least 7 hours) if there is work available during the day time.

Finally you should arrange economical pick-up calls at the end of the record-keeping fortnight; where informants are coping well with record keeping, it may be sensible to arrange for them to post diaries to you.

Please do keep us informed of your work-pattern if it strays very far from the norm.

If your quota is VERY isolated, it would be better to discuss the quota individually with the Field Officer.

Many of the questions in the FES schedules are self-explanatory or have points of definition printed beside them on the schedule. Additional details concerning certain points about questions are contained in the sections on individual questions. Background information on benefits, items of expenditure, etc are contained in the glossary at the end of these instructions.

Layout and procedure

6.2

The following is a list of general design points outlining the logic of the design of the schedules.

- a. Type face is restricted to two types for simplicity:
 - i. Plain type for questions and answer codes,
 - ii. Bold type for question numbers, instructions, notes, signposting and important points within questions.
- b. As far as possible, codes and signposts are located to the right of the punching columns.
 - i. Whenever there is no signpost next to a code, go on to the next question.
 - ii. An 'Ask' direction occurs at a filter and signposts you to the next question, usually a subsidiary to the one just asked. It also occurs at the foot of a page as a guide to the next question to ask.
 - iii. A 'Go to' instruction directs you past one or more questions (ie the question after the next question or any question further on in the schedule).
 - iv. A 'See' instruction directs you to a question that may or may not apply to that spender. Bold type above the question to which you are signposted indicates the people or groups of people it applies to.
 - v. DNA N codes follow 'See' instructions, they should be ringed when the question does not apply to the informant. A signpost after the 'N' indicates the next question that could apply. Go straight to the next applicable question; it is not necessary to ring any intervening DNA codes.
 - vi. When signposted past a question do not ring any codes at that question.
- c. Other points
 - i. Dotted lines in coding column, grids or body of page. Answers to be entered only on dotted lines.
 - ii. Where amounts of money are mentioned the period covered must be given as well.
 - iii. Prompt cards are used on the B (Income) schedule at Q's 22, 26,41,44-54, 57-66, 74,76, 77, 79,81 and 82.

- iv. Initials are not to be used at all in schedules, eg. N.F.U should be entered as National Farmers Union, B.U.P.A as British United Provident Association.
- v. The starting date for the 12 month reference period is prompted for certain questions on the household and income schedules.
- vi. An 'E' must be entered beside any entry, but outside the coding box, for any answer which the informant has estimated.
- vii. Write 'DK' beside the question if the informant cannot give an answer to the question. Estimates are preferable to D.K's.
- viii. If a particular case does not seem to be dealt with on the schedule or in the following notes on individual questions, record all the information about the case at the appropriate places on the schedule in order that Primary Analysis can take necessary action.

Wording of questions

6.3

There are two types of questions on the schedules. They are:

- a. Questions where precise wording is used. (These are the majority of questions on the Household and Income schedules).

Example

Q56 'How much did you pay for gas/electricity in your last account?

This type of question should be asked exactly as worded because the information required is specific and related to a time period ie. LAST ACCOUNT.

- b. Boxes under questions where precise wording is not used, eg. the Box under Q. 46 on Household Schedule.

Per No paying	Purpose of policy eg House purchase endowment, mortgage protection	When taken Out	Period covered by premium (eg. cal month, year)
		Before April '84 or later	
		B A	
		B A	

The second part of the question is in the form of a grid and it is left to the interviewer to ask the necessary questions to obtain details.

Recording of all expenditure

6.4

It is true that the FES is a survey of private household expenditure. However, informants should give all their own expenditure (business and private) in the

Household schedule AND in their diaries. At the editing stage coders will edit out the business component provided you indicate it is business expenditure.

This rule applies where informants are drawing on their own cash and bank accounts. The most difficult cases arise with the small self-employed businessman who has one bank account to pay both personal and business expenditure.

NB Edited out business expenditure is used by CSO for various calculations and is not wasted.

This schedule should be kept by the interviewer and not left with the household.

NB Some questions are asked of H.O.H or wife; other questions are asked of all spenders.

For definitions of H.O.H. and spender see Section 3.5 - 3.9.

Where informants have recently moved or the household is newly formed bills for current accommodation may not be available (See 3.12)

NOTE THAT IN ADDITION TO NEW QUESTIONS SEVERAL OLD QUESTIONS HAVE CHANGED THEIR ORDER IN 1985.

NB. HOUSEWIFE COLUMN HAS BEEN DELETED FOR 1985.

Date of interview

FRONT PAGE

If the household schedule cannot be completed on the same date in respect of all spenders, for example if a shift worker cannot be seen on the same day and has to be interviewed later, do not forget to enter the person number and date of subsequent interview(s) as well.

Starting date of records

FRONT PAGE

Since records do not start until all the spenders have been interviewed, the starting date should be either the same day as the (last) interview or the day after. This, in turn, should tally with the dates entered in the "D" records.

The starting dates should be the same for all members of the household.

Enter both date of interview and starting date of records in full eg 4 May 1985.

Reference number box

FRONT PAGE

Enter leading zero in the serial number box for any address numbers 01-09.

For addresses containing only one household, there is no household number, but a dash is to be inserted in the household box as in the following example:

Area	Ser	Hld
499	01	-

For addresses containing 2 or more households number the first 1, the second 2, etc. ie no leading zero.

Person no

ITEM 1

In most cases, the household is a simple one, comprising a husband and wife, with

possibly one or more children. However, difficulty can arise at the computer stage when the household contains more adults than one married couple. Would you please help us to avoid this by always recording each husband with his wife then children consecutively in column 2.

Age

ITEM 4

Note change for 1985. This now complies with social survey definition as shown in the Handbook for Interviewers, page 63.

Marital Status

ITEM 5

Code 1 applies where both husband and wife are members of the household (see 3.5).

Code 2 applies where husband or wife is not a household member (see 3.5).

Codes 3 and 4 ("not married") include not only single people but also anyone who is widowed, divorced or separated. (This ruling applies whether the separation is legal or not). Children should be coded 3 or 4 according to their age.

A couple who are co-habiting and consider themselves as husband and wife should be treated as married.

Current full-time education

ITEM 6

An informant should be coded as full-time on the basis of his registration at the educational establishment. If registered as full-time student code as full-time. If registered as part-time do not code at this question (See also Q83-92).

Code 1 - This includes children attending playgroups, day nurseries, etc where there is no attempt at formal education.

Codes 2 and 3 - A State school is one where the up-keep is either provided entirely by the State via the local authority or as in the case of schools controlled by different religious denominations where most or all of the up-keep is provided by the State. Note there are still a few cases in Scotland where small fees are paid at State schools. However, if these cases arise they should be coded under State schools and not under Private and Independent schools.

Nursery classes and schools count as primary schools, but day nurseries do not. The crucial point is whether some education is given (see code 1).

A session is a morning or afternoon. Ten sessions is therefore a full 5 day week.

Code 6 - Private and Independent schools are those at which at least some pupils (though not necessarily the spender) pay fees. This will include all public schools in England and Wales.

Middle schools should be shown as secondary schools, code 4 if State or 6 if private.

Codes 7-9 - Higher education. The following definitions cover non-advanced and advanced further education:

a. Advanced further education courses are those outside universities which are above OND/ONC standard. They include; Teacher training, first and higher degrees, HND or HNC, TEC (Technical Education Council Certificate) "or BEC (Business Education Council Certificate)", higher courses, SCOTEC or SCOTBEC (Scottish TEC and BEC) - higher courses, Diploma in Higher Education and all other courses above 'A' level or HND/HNC.

b. Non advanced further educational courses are those up to and including the standard of GCE 'A' level or OND/ONC. They include; OND/ONC, TEC (Technical Education Council Certificate) or BEC (Business Education Council Certificate) - ordinary or general courses, SCOTEC or SCOTBEC (Scottish TEC and BEC) - ordinary or general courses, City and Guilds, GCE, SCE, CSE or CEE.

Note apprentices are treated as working and not as receiving full-time education.

Age at which full-time education completed

ITEM 7

This is an important classificatory variable which relates to earnings. The age required here is that at which the informant completed his continuous education that started in infancy. It should NOT include any continuous period of education which was taken later in life, e.g. as a mature student. Where an informant is still at school enter a dash.

NB. Where an informant had a waiting period of a year or less before taking up a university place after leaving school because of difference in academic years then the age of leaving university should be accepted.

Income unit

ITEM 8

The coding in this section is to enable the household to be split into separate income units;

- a. A husband is always coded 1 (Head of unit).
- b. A wife is always coded 2 (wife of head), even if her husband has been excluded from the household.
- c. Single persons aged 25 and over and Widowed or Divorced of any age are each coded 1 (Head of his/her own unit).

Do not code 'office use' columns.

Spender

ITEM 9

Ring all eligible spenders. If a household member is not ringed in this column be sure to note the reason for this in the box below the column.

Code 1 must be ringed for each spender coded in item 9, after completed D records for both weeks have been received at the end of the 14 day period. If at the final collection there are not two completed books for each spender, H.Q. should be contacted immediately for a decision regarding payment. A full description of the circumstances should also be put on a note pinned to the front of the household schedule.

No of households

Q 11(a)

The total to be entered here is the total number of all OTHER households living at the address, BESIDES (ie not including) the informant's household. This is irrespective of the member selected for interview via the multi-household procedures. The address is as specified on the Address List and should be read out in full to informants.

No of rooms

Qs 12 AND 13

Question 12 applies where there is only one household at the address.

Question 13 applies if there is more than one household at the address.

Other rooms specify

Qs 12 AND 13

Rooms entered under 'other specify' should be described fully as follows;

- i. Name of room
- ii. Whether there is a window
- iii. Use to which room is put
- iv. Whether the room is used throughout the year

Garages

Q 14

Q. 14 should be asked of all spenders, not just the head of household as garage rent can be paid in respect of any garage.

Rent received in respect of a sublet garage should be included at Q76 on the income schedule.

HOH: Years lived at address

Q 15

THIS IS A NEW QUESTION FOR 1985 AND IS ASKED ONLY OF HOH. If less than a year record the number of months.

Type of tenure

Q 16(a)-16(d)

These questions apply to all types of accommodation including caravans, mobile homes and houseboats.

Rented accommodation

Q 16 (a)

Council - includes all cases where the Local Authority is the Landlord, or where rented unfurnished property is owned by a New Town Development Corporation, the Scottish Special Housing Association or the Northern Ireland Housing Executive. If the informant receives accommodation furnished from a Council, please note this in left hand margin of schedule.

Note: sometimes houses built by a Council are now owner-occupied.

Housing associations: Includes all housing associations except those under 'Council' above.

Owned accommodation

Q 16(b)

Someone who has fully paid off their mortgage is coded 5 ie owning outright.

Rent free accommodation

Q 16(c) & (d)

Rent free accommodation is usually supplied by an employer without deduction from wages. However rent free accommodation can be supplied by a friend, relative, trust or organisation.

If after probing, accommodation is established as rent free at part (c), part (d) should be asked.

If coded No X at part (d) (iii), specify the arrangement in full. Among the details required are:- the relationship of the organisation or individual providing the accommodation, whether the organisation or individual providing the accommodation owns it or rents it and, if rented, is it council or private, furnished or unfurnished.

Where an informant has 100% local authority or DHSS housing benefit (ie rebate) THIS SHOULD NOT BE TREATED AS RENT-FREE - SEE Q17.

100% Housing Benefit/Rebate/Allowance

Q 17

Note: 1. Housing Benefit is another name for rebate or allowance.

2. This question is related to Housing Benefit and can cover (in addition to rent) rates, water rates and heating. Please note: all Housing Benefit covering rates only should be entered at Q.28.

We are no longer asking council or New Town tenants the amount of 100% Housing Benefit. Therefore, if the answer to Q17 is 'Yes...Y' check at Q16(a) to see if accommodation is rented from a council or New Town Corporation (code 1). If it is, then obtain yourself the full details of weekly rent payable from local housing or rent office and enter at Q17(a)(i). Enter details of rates, water rates, heating, etc on grid at 17(a)(ii) if included in rent. See page 54.

If the accommodation is rented from a housing association or someone else (code 7, 2 or 3 at Q16(a)) ask the informant for details at Q17(b)(i) and (ii). Where the informant does not know rent paid on their behalf code 'DK...1'

SEE SPECIMEN NOTIFICATION FORM AT END OF THESE INSTRUCTIONS

Last rent payment

Q. 18

At this question, any payments made direct by Supplementary Benefit Office or the local authority should be ignored ie only the amount ACTUALLY paid by informant should be entered. Therefore those with housing benefit should not include the housing benefit at this question but rather at Q17, 21 or 28.

Rent holidays

Q. 20

Rent holidays occur where tenants have one or more weeks in the year for which no rent is due, usually at holiday periods. To allow for this, the year's rent is divided into 48, 49 or 50 instalments instead of 52.

Rent rebates, allowances or housing benefit

Q. 21

Rent rebates are granted to those living in Local Authority accommodation and rent allowances are granted to those living in privately rented accommodation. Another name for rebate or allowance is Housing Benefit.

Rebates are normally deducted from rent.

Allowances are normally received in the form of a lump sum refund.

In order to obtain rent rebate or allowance the tenant must apply to the DHSS or Local Authority giving details of rent and personal circumstances.

These are not the same as the differential rent scheme in which tenants are required to declare their income, whether or not they wish to apply for a rebate/allowance. Thus in applying for a rent rebate/allowance, the tenant offers his income details voluntarily. The onus is on him to apply for a rebate/allowance.

Under the new Housing Benefit scheme, the benefit could be received in the form of a rebate or allowance from the Local Authority. This applies whether application was made to the Local Authority or to the DHSS. It is possible, however, that during the interim period some informants will receive housing benefit in the form of Supplementary Benefit (Income Schedule Q60).

Services included in rent

Q. 22

This question only applies to households who actually pay some or all of their rent and have answered Q. 18.

Services paid for separately by informants who have 100% housing benefit should be shown in diaries only.

Payment of rates

Q. 24 (a)

If an informant says he pays calendar-monthly, check whether he makes 10, 11, or 12 payments per year.

Note that amount of rates to be entered is the AMOUNT ACTUALLY PAID LAST TIME and should exclude any rebate.

Mains sewerage

Q. 25

This question must be asked individually for all households

In urban areas accommodation will normally be connected to mains sewerage. In rural areas accommodation not connected to mains sewerage will be more frequent.

The informants will normally know whether their accommodation is not connected to mains sewerage as they will have to make arrangements for clearance of septic tanks, etc.

The amount of sewerage rates charged depends upon whether or not accommodation is connected to mains sewerage.

A charge for emptying a cesspit or septic tank should be shown in diary when paid NOT in the household schedule.

Water/sewerage/environmental rate payments

Q. 26

If an informant says that he pays calendar monthly, check whether he makes 10, 11 or 12 payments a year.

If water and/or sewerage rate are paid direct to water authority or local authority they should be entered here. If paid with domestic rates they should be included at Q.24. If rent includes these items enter total at Q. 17 or 18.

Charges made via water meter should be treated as water rate payments.

Environmental rates are part of sewerage rate if household is connected to a mains sewerage. They are paid separately if household is not connected to a mains sewerage

NB Environmental rates as such are not paid in Scotland.

Land drainage rate is charged by the Local Authority or private company for the drainage of land. It is a localised charge in areas liable to flooding, etc. It should not be confused with sewerage rate or environmental rate.

Housing Benefit is the new name for rebate, however, respondents may still think of it as rebate.

The principle involved in obtaining a rates rebate is the same for all forms of tenure. In all cases the rate-payer must apply to the DHSS or council rates office for the rebate and provide income details.

For rented property probe to make certain that it is a rates rebate and not a rent rebate that is received from the Council (see instructions for Q. 21).

The different ways of receiving a rates rebate are:-

- i. to have the rates rebate deducted from rent (where rates are paid with rent).
- ii. to have rates rebate deducted from rates (where rates are paid direct).
- iii. to receive the rebate as a lump sum cash refund from the Local Authority. (Lump sum refunds can be received more than once a year).

A rates rebate should not be confused with a discount for prompt payment of rates, etc (eg. receiving a discount for paying the year's rates in one lump sum).

HOUSING BENEFIT SUPPLEMENT IS AN ADDITIONAL BENEFIT THAT CAN BE PAID TO THOSE already getting Housing Benefit in the form of a rent rebate/allowance or rate rebate.

Housing Benefit Supplement is paid in the form of an increased rebate or allowance. An individual receiving Housing Benefit Supplement is entitled to the same 'passport benefits' as a person receiving Supplementary Benefit eg free prescriptions, free school dinners.

SEE SPECIMEN NOTIFICATION FORM AT END OF THESE INSTRUCTIONS

This question applies to all households, but mainly owner occupiers, and covers a wide range of payments. eg Mooring fees, portorage, cleaning of common way. Do not duplicate entries at Q.22 which applies only to renters.

Q. 31 applies when Q. 16(b) is coded 4 (owns with mortgage). Someone who has paid a mortgage and no longer has one outstanding on his house is coded 5 at Q. 16(b).

At Q's 31-40 obtain information for mortgages used to PURCHASE THE SAMPLED ACCOMMODATION ONLY. Second mortgages for home improvement, car purchase, etc should appear at Q. 69.

Loans or mortgages should be coded according to the type of organisation or individual providing the loan or mortgage. For instance if the mortgage is financed by a building society code 1 should be ringed. If an individual receives a loan from an insurance company based on an insurance policy code 4 should be ringed. Where two organisations are providing the mortgage, record details of the smaller mortgage in the left hand margin of the page

Other source (code 5 at Q. 31)

Private loans should appear here; also loans from employers, unless the employer is a building society, local authority, bank or insurance company (in which case, codes 1, 2, 3 or 4 should be ringed).

Type of arrangement covered by last mortgage payment

Q. 32

If we are to get the information we need, it is necessary to understand that there are basically two types of mortgage arrangements. Few informants will know this, so it is up to the interviewer to identify the type.

a. Interest only

Usually an endowment policy is taken out with an insurance company either before or at the same time as the mortgage, and it is arranged that when the policy matures it will cancel out the original sum (the principal/capital) borrowed under mortgage, i.e. the amount of money received from matured endowment insurance is paid to the mortgager. eg. building society. The principal of the original mortgage remains outstanding until the policy matures. In the meantime interest is paid on the total amount borrowed and premiums on the endowment policy. This type of mortgage should be coded 8 at Q. 32.

b. Interest and Principal

In this case the money borrowed for the purchase of the house is re-paid over a period of years; interest is also paid on the amount outstanding at the time. Usually the payments in any one year consist partly of repayments of the original loan (the principal/capital) and partly of interest. As time goes on the interest part becomes smaller and the principal gets larger. This type of mortgage should be coded 9 at Q. 32.

Any arrangement that does not fit into either a. or b requires full notes eg. a 'top up' mortgage where part of the mortgage is 'interest and principal' and part is 'interest only'.

It is important to know whether the interest recorded at Q. 33 includes an amount for an insurance premium on the mortgage capital/principal. Therefore if there is an entry at Q. 33, Q's 35(a), (b) and (c) MUST be answered.

If the mortgage capital/principal is not covered by an endowment policy (Q. 35) please specify in full how the mortgage capital/principal is covered.

Specify document consulted, at the foot of page 11.

Interest and capital/principal mortgages

Qs. 36-38

Interest is required for the LAST YEAR for which the informant has figures. The information will normally be available on a statement provided by the mortgaging company.

Because the information is not current or may not cover a full year it is necessary to record dates covered by amount. Where there is more than one mortgage for house purchase, enter details of other mortgages in left hand margin.

Although the interest payment recorded at Q. 38 may be for a tax period some while before the day of interview, it is essential that you obtain, at Q. 36, the last payment made before interview.

Specify document consulted at the foot of page 11.

How many years has the mortgage run/to run

Q. 39 & 40

These are new questions for 1985 and are asked of those whose last payment covered interest and principal/capital (Q36).

If the answer to both Q39 and Q40 is DK then code 3 below Q40.

Mortgage payment, standard tax relief deducted

Q. 41

When interest is paid on a mortgage the mortgagee can obtain tax relief on that interest.

Up to April 1983 the tax relief was always obtained by a reduction in income tax paid. This was by means of PAYE coding for employees or tax assessment for self-employed.

From April 1983 a new scheme has been introduced whereby the tax relief is obtained by a reduction in mortgage payments. Not all institutions have adopted the new scheme. Nevertheless it is important to try to obtain an answer to Q. 41.

With interest only mortgages the interest payment will be reduced by the current standard (or basic) tax rate (30% at time of writing).

Sometimes, in addition to mortgage repayments, a mortgage protection policy is taken out with an insurance company so that in the event of death there is available a sum of money to pay off the outstanding mortgage. This arrangement should not be confused with the endowment policy described above at Q. 32. A mortgage protection policy is to pay off the outstanding mortgage in the event of death of the mortgagee. It is possible to have an endowment based mortgage and a mortgage protection policy.

NB. The period covered by the addition to mortgage need not be the same as the period of the last mortgage payment, eg annual insurance premium could be included in one month's mortgage payment.

Insurance on structure/furniture and contents

Qs. 43 and 44

Note that for 1985 a new dependent question 43(c) has been introduced. This formalises the instruction that has existed for some years regarding combined insurances.

Insurance on personal possessions

Q. 45

Maintenance contracts for television sets, washing machines, deep freezers, etc. should not be included at these questions. They should be recorded in 'D' records when paid.

Life assurance policies

Q. 46

Insurance policies to be entered here fall into two main types

1. Paid out only on the death of the insured person eg. mortgage protection policy.
2. Paid out when the policy matures at an agreed date or earlier if the insured person dies before the agreed maturity date. A mature policy payout of this type can be in lump sum form or by instalment ie. annuity pension.

Note that for 1985 you are required to ask whether the policy was taken out before April 1984 or in or after April 1984. This was the date that tax relief was removed from life related insurance policies.

Other insurance policies

Q. 47

This question includes Friendly Societies.

Specify which type of insurance is covered, eg. personal accident, third party or medical, British United Provident Association (BUPA), Private Patients Plan (PPP). Exclude one-off insurance policies eg. holiday/travel insurance.

Starting with Q. 48 the phrase 'your (part of this) accommodation' is used. This phrase appears at Questions 49, 50 and 54. The phrase only applies to cases where there is more than one household at the selected address.

"Accommodation" is the space owned, rented, etc. by the household (including rooms used solely, shared or sublet) whereas "your part" of the accommodation refers to the living space occupied by the household being interviewed (ie. only those rooms occupied solely or shared).

TV Sets/TV Games/Home Computers

Q48

From 1985 the old TV question has been expanded to include TV games and home computers as well as TV sets.

TV sets

Where a TV set is broken, it should be accepted as a TV set in the accommodation if a TV licence was purchased in the last 12 months. If a licence has not been purchased treat as 'no TV set.'

Note that for 1985 the total number of TV sets available in the accommodation should be entered at Q48.

TV games

These refer to single purpose equipment that can only use game cassettes or cartridges. They are sometimes called video games.

Home computers

These refer to equipment that can run pre-recorded cassettes containing games or other programmes (eg home accounts, study courses) as well as blank cassettes on which programmes can be entered.

Examples are Sinclair ZX81 or Spectrum, Commodore 64.

A new question 49 is introduced for video recorders.

NB. This question is concerned with the availability of items, not only ownership. Therefore a TV set situated in shared accommodation and used by two households should be entered in both household schedules.

TV Slot meters

Q. 48 (1c), (ci), (cii)

Excess money in TV slot meters is often used to finance the purchase of other consumer durables such as washing machines. If informants mention that they are buying any goods in this way, the information should be entered at Q. 69-73 giving full details. The rebate BEFORE any deductions should be entered at Q. 48(ci).

Video recorders

Q. 49

This is a new question for 1985 and follows the same format as Q48 (TV sets).

Telephone account payment

Q. 50(d)

Note that installation charge should be included if applicable. If the informant pays for his telephone by a Post Office Budgeting Scheme the amount to be recorded at Q.51(a) should not be the monthly payment but the amount shown on quarterly advice.

If the last payment due was not paid because the informant had a credit with the Post Office ie. had overpaid in previous payments, note this fact AND ENTER LAST ACTUAL PAYMENT OF MONEY.

Licences

Q. 51

Specify any 'other licences' in full. Do not use initials.

Possession of durables and central heating

Q. 52

A washing machine for FES purposes is a machine which has an electrically-operated agitator/pulsator. Therefore, a wash boiler with hand agitator should not be considered a washing machine.

Include durable listed items which are:-

1. Owned by the household.
2. Not owned, but continuously available for use in the accommodation eg, rented, etc. (Do not include washing machines for communal use).

Exclude:-

1. Durables that are beyond repair
2. Items that cannot be used, eg, central heating that has been disconnected.

Central heating In multi-household blocks of flats the source of heating may be located outside the households accommodation or in another households accommodation. If the informant does not know the type of fuel used for heating this should be accepted.

Expenditure on oil for central heating

Q. 52 (a) (1)

Estimates of 12 months expenditure are acceptable here.

Solid fuel costs are not asked for at this question as they tend to be less regular than oil and the record book is better for this purpose.

Main fuel used for room heating

Q. 53

This question must be asked of ALL HOUSEHOLDS.

Note that this question may be multi-coded.

Please note that the wording of this question is the same as on the GHS and GHS definitions apply.

Method of payment for gas/electricity

Q. 54 (a)

Slot meter - Include here slot meters which are emptied by gas or electricity board, landlord or landlords agent. Exclude meters emptied by informants themselves.

Account payments - Payments on a quarterly basis (or two-monthly in Scotland) which follow reading of the meter, either by a gas or electricity board official, or by the informant, should be included here. This is the most usual method of payment.

Also include cases where informants have their own key to empty the slot meter. They still have to pay an account which is submitted after the meter has been read.

Board Budgeting Scheme - With this scheme the informant will still get an account/advice every quarter showing the units used and the details of the account.

Some other method - Includes any method that does not fall into the above categories, eg. money paid to Council, separate from rent.

C.O.C.D-this method of payment applies only to Northern Ireland.

Rebate for gas/electricity - slot meter

Q. 55

Enter the total amount of rebate at Q. 55(a). Where the household has HP commitments which are paid from the meter rebate, make certain that the amount at Q55(a) is the full amount of rebate BEFORE deduction of the HP payment.

Make sure the items being bought on HP are noted at Qs 69-73.

Amount shown on account

Q. 56

It is the cost shown on the account which should be entered at Q56 (ie the actual cost of fuel and standing charge during the period of the account before any deduction for over payment in previous periods), plus meter rent and installation.

The period covered should be shown at Q60.

NOTE SIGNPOSTING TO Q60.

Board budgeting scheme - agreed payments

Q. 57-58

At Q's 57 and 58 the last specified payment made to the Board and period covered should be entered. NB The last payment may have been a correcting payment but it should still be entered.

If the last payment due was not paid because the informant had a credit with the board, ie. had overpaid in previous payments, note this fact and ENTER LAST ACTUAL PAYMENT OF MONEY.

Amount shown on budgeting scheme advice/account

Q. 59

It is the cost shown on the advice/account which should be entered (ie. the actual cost of the fuel, plus standing charge, during the period of the advice/account, before any regular payments are deducted). The period covered should be shown at Q.59

NOTE SIGNPOSTING - TO Q.60

Period of account/ advice

Q. 60

This question applies to Board Budgeting Schemes (Q.59) AND account payments (Q. 56).

Dates of electricity/gas account

Q. 61

Electricity and gas authorities vary in the information they give concerning dates of account. The date on which the quarter or other period ended is required. This may appear on the account/advice under one of the following headings:-

"Date of account"

"Tax point date"

"Date of issue"

"Date meter read"

THIS IS ASKED OF ALL PAYING BY ACCOUNT OR BOARD BUDGETING SCHEME

Vehicle ownership or usage

Q. 62-64

Ask Q.62 (a) - (f) for vehicles currently owned or made use of. Ask Q. 64(a) - (f) for vehicles owned or used in the last twelve months but not currently owned or used. 'Had continuous use of' at these questions includes company vehicle and contract hire but does not include vehicles hired from time to time, eg. holiday or weekend.

EXCLUDE any vehicles bought and sold as part of business. Vehicles sold in last 12 months which are not part of business should also be shown at Q66 on household schedule. Where an informant buys and sells vehicles as a business treat as self-employed on income schedule.

A 'car' includes three wheel car and invalid tricycle or car

A 'van' includes lorry, landrover or jeep.

Tax or insurance can cover any period (eg. Tax paid in last twelve months could cover two years because one annual tax was paid late and the other paid early).

Insurance for damage to windscreen should be included in vehicle insurance.

Q62 (g). This question only applies to cars for continuous use. Do not include cars purchased from employer.

Petrol provided for private motoring

Q. 63

This question applies to all respondents who currently have cars whether owned or for continuous use. Include as private motoring journeys to a regular place of work.

Vehicle purchase

Q. 65

Include at this question cars purchased by cash or cheque outright or by a loan from relative, friend or bank OVERDRAFT.

Cars purchased by any other type of loan must be entered at Q.69-73.

Note: Q65(d) is new for 1985.

Vehicles sold

Q. 66

This question applies to all vehicles sold for cash.

EXCLUDE: Vehicles sold as part of a business or sold in part exchange.

Refunds of vehicle licence

Q. 67

Refunds to be entered here include those from vehicle licencing office or purchaser of vehicle if sold.

Season ticket

Q. 68

Please ensure that information recorded here is not duplicated at Q. 82 'travel to school'.

These questions cover purchases by different forms of credit including credit cards.

Qs 69-73 are designed to establish the different forms of credit being used.

Qs 74 is concerned with details of credit purchases for agreements coded 1-3 and 7 at Q. 69

Q. 75 is concerned with details of credit purchases for agreements coded 4 at Q70.

Q. 76 is concerned with details of credit purchase for agreements coded 6, 8-10 and 12-13 at Q. 71

SB35C is concerned with details of credit card payments when code 14 is ringed at Q. 72

Note that the signposting at questions 69-73 has been changed for 1985.

The questions are self explanatory and details of the different types of agreements are given below. However the following general points should be noted.

1. When recording details of repayments, always ask to see loan documents or repayments card. This is particularly important at Q's 74 and 75.
11. Ensure that serial number is entered at top of pages 27 and 28.
111. A single code only should be ringed in each column of Q. 69-73 combined.

Bank, finance house direct (code 1 or 2)

Q. 69

The main criterion in deciding whether code 1 should be ringed is that the borrowed money is repaid direct to the bank. If the informant has an HP agreement which he is repaying direct to a finance house, code 2 applies; but, if he has an HP agreement by which the money was borrowed from a finance house, but the informant's repayments are being paid to the vendor, code 4 applies (see below).

Two types of loan from banks/finance houses which should not be included in code 1 or 2 are:

1. overdrafts - these should not be shown at Q. 69 at all (if used to purchase car see Q. 65 otherwise ignore).
11. second mortgage - see below.

If an informant says that he has a personal loan from a bank/finance house you will need to check carefully, as second mortgages and overdrafts are sometimes referred to as 'personal loans'. The loan agreement should help you distinguish which type of loan the informant has.

Second mortgage (code 3)

Q. 69

Do not include a 'top up' or further mortgage used to purchase this accommodation. These should already have been entered at Q. 31-42 of the household schedule.

Second mortgages are sometimes referred to as 'personal loans', 'bank loans', 'budget loan accounts' or 'overdraft facility'. The determining factor is the use of a house as security.

Loans from employer (code 7)

Q. 69

These are usually for household expenses, eg purchase of season ticket, car, moving house.

A loan from an employer to purchase this accommodation should be treated as a mortgage and should be shown at Q31 - 42.

Hire purchase or credit sale (code 4)

Q. 70

Hire purchase agreements arranged directly through a finance house should be coded Finance House Loan (code 2).

Budget or option account (code 6)

Q. 71

Holders of budget or option accounts are often issued with a plastic card similar to a bank credit card. This is NOT TO BE TREATED AS A BANK CREDIT CARD BUT AS BUDGET OR OPTION ACCOUNT. This card can be used sometimes in a number of shops, eg. Readycredit card can be used in Rymans and Top Shops.

Shop running a club (code 8)

Q. 71

If you are in doubt about a club agreement mentioned by the informant, describe the arrangement fully in a note.

Please note that Christmas Clubs (except those run by toy shops), savings clubs, etc. are excluded from this category.

Mail order agent (code 9) (eg. Universal, Littlewoods)

Q. 71

This includes all payments made to the mail order agent acting on behalf of a mail order firm. Agents are often neighbours, friends or sometimes even your informants themselves. Instalments should be coded here and not at code 10.

If informants say that they are agents for a mail order club and also make purchases for themselves, explain to them that only their own repayments are required in their record books, any postage on behalf of the club should be entered and noted as business expenditure.

A mail order agent is not considered self-employed (see income schedule Q85).

An HP or credit sale agreement arranged by a mail order firm should be coded 4 at Q70.

Other mail order organisations direct (code 10) Q. 71

Quite often it is difficult to distinguish between payments to a mail order firm direct and payments to a mail order agent. If an informant deals direct with the firm and receives no commission, it is a direct mail order transaction. An example of this type of arrangement is where a book is bought from the Automobile Association on monthly payments.

Check trader (code 12) Q. 71

HP or personal loan agreements with a check trader should be coded 4 at Q.70.

Other schemes (code 13) Q. 71

Other credit arrangements should be described fully, giving the length of credit, the method of repayment and the type of goods. Include here loans from relatives or friends.

Do not include arrangements with trade unions or social bodies whereby goods are bought at reduced prices.

Credit cards (code 14) Q. 72

This question should be coded Yes ... 14 for all spenders POSSESSING a credit card. The procedures for recording Credit Card Account payments are covered in instructions on Credit Card Account Payments Sheet S835C.

Credit cards include BARCLAYCARD, ACCESS, AMERICAN EXPRESS, TRUSTCARD, DINERS CARD, etc. EXCLUDE cheque cards, option account cards or cards issued for budget accounts. (See below).

Newly-acquired credit agreements Q. 73

If the answer to Q.73 is Yes, ring code Y in the next blank column on page. When recording details at Q. 69-72 for new agreement, they should be entered in the next blank column after the column just coded Y.

If there is no new agreement, code NoX.

Credit agreements coded 1-4 and 7 at Qs 69 and 70 Q. 74 & 75

Q. 74 is concerned with loans coded 1-3 or 7 at Q 69 and Q 75 is concerned with hire purchase and credit sale coded 4 at Q 70.

- i. Always record cash price, NOT credit price ie EXCLUDE INTEREST.
- ii. Where informant states loan was cash find out what was bought with cash.
If for specific purpose give details. If not for specific purpose note this fact.

If part of loan for specific purpose and part for cash ascertain how much for each and details of specific item bought.

NOTE : we need to account for all money borrowed in as much detail as possible.

- iii. Description of item bought should be specific. For example, 'Home improvements' is too vague; enter 'double glazing', 'addition of bath', etc.
- iv. Car leasing should be treated as car hiring and not car purchase on credit.
- v. Note footnote following these question on the schedule.
- vi. Instalment repayments covering more than one item at Q's 74(e) and 75(a)

Where a loan, HP agreement or second mortgage covers several items of different types, the details and cash price of each should be given in separate columns, eg. if a loan for home improvements covers the purchase of 2 suites of furniture (cash price £500 and £400) and the structural improvements to the house of £1000 the entry should be:

Furniture £900 in first column

Structural alterations £1000 in second column.

If £2000 was borrowed to pay for these items there would be a cash residue of £100. A note must be made of any part of such an amount which is not used for the purchase of a specific item. (There should only be a cash residue where the borrowed money was a personal loan or second mortgage).

- vii. Where an instalment covers different items which are in separate columns and the instalment cannot be divided, the amount should be entered in first column and the words 'combined instalment' written in the other column covered by the instalment, e.g.

Combined	Combined
£30.00	Instalment
	Instalment

- viii. Remember that all money borrowed has to be accounted for even if only as a cash residue.

Credit agreements coded 6, 8-10 and 12-13 at Q. 71

Q. 76

If the name of the firm is not available, give the type of firm, eg 'photographic shop' 'man who comes to the door'.

It is essential to record the date the goods were obtained.

THIS QUESTION IS NOT CONCERNED WITH DEPOSIT ACCOUNTS, ETC WHICH ARE SAVINGS ACCOUNTS AND DEALT WITH ON THE INCOME SCHEDULE. (Q.74)

The purpose of this question is to obtain domestic bank charges on normal banking transactions. This means that we wish to exclude any parts of the bank charges which refer to interest on loans or overdrafts and any bank charges arising from business use.

By normal banking transactions we mean those carried out on current or budget accounts, eg. cheque withdrawals, standing orders, direct debit and cash deposits (including wages).

Interest charged on budget accounts should not be included at this question, but at Q. 76.

Note that Q77(a) has been reworded for 1985 and now refers to the last 12 months.

This question applies only to items of expenditure not already recorded on the household schedule. This avoids duplication of work.

If, when answering this question, the informant provides information that was missed at an earlier question, eg details of loan, then ensure that the relevant question is asked again and full details obtained.

Bank Budget Accounts

List all items covered by bank budget accounts not already covered by household schedule answers as well as AMOUNT of annual service or interest charge.

Payments made by Safehomes etc should be treated in the same way as bank budget accounts.

If a payment is made to a credit card company by standing order or direct debit make a note of the date in the month on which it is paid. See also Q. 70 and instructions on credit card account payments sheet (S835C).

Enter person number and the total number of items acquired per person.

Exclude items acquired on a prescription season ticket, which is a ticket purchased from the local health authority by persons not entitled to free prescriptions but who require regular medication.

a. Liquid Welfare Milk

The individual receiving the milk should be entered under the person number column.

Free milk is available for:

- i. Expectant mothers and all children under school age in families in receipt of supplementary benefit, housing benefit supplement, family income supplement or in special need because of low income.
- ii. An expectant mother who already has two children under school age, regardless of family income.
- iii. All but the first two children under school age in families with three or more children under school age, regardless of family income.
- iv. Handicapped children aged 5 to 16 who are not attending an educational establishment.

b. Free school Milk

Free school milk is supplied to children up to approximately their seventh birthday (11th birthday in some LEA's) at registered day nurseries, playgroups and state primary school or approved child minder. The amount is one third of a pint per day.

For children with particular health problems, milk may be supplied up to their sixteenth birthday or the allowance may be more than one third of a pint.

School meals, - state school children

Q. 81

The person receiving the meal should be entered at the top of column in which details are recorded.

Note at 81(c) only amount paid in last seven days is required.

Free school meals are supplied to children whose parents are on a low income. The conditions governing school meals vary from local authority to local authority. NOTE THAT ONLY SCHOOL CAFETERIA AND FIXED PRICE MEALS ARE REQUIRED, NOT TUCK SHOP PURCHASES.

Travel to school - state school children

Q. 82

This question applies only to children attending state schools. Where one child in the family travels to school without payment, then all children in the family should travel without payment if attending the same school or attending different schools approximately the same distance from home. Check for any duplication of information at this question with Q 68 (season tickets).

Note that at 82(b)(i) the amount paid in last seven days is required.

These questions are asked of ALL spenders in respect of FULL or PART TIME education including leisure classes (driving lessons, swimming lessons etc).

An informant should be coded as full or part-time on the basis of their registration at the educational establishment. If he is a registered full-time student, code as full-time. If registered as a part-time student, code as part-time. Normally leisure classes are part-time, but this is not always the case. Please note this definition especially when completing the front page and Q 87(e) on this schedule.

Qs 83 and 84 refer to spenders and children considered to be in the household for FES purposes.

Note the introduction of new questions 83(i), 84(a)(iv), 84(a)(v), 84(a)(vi) and 84(b)(v).

Q's 85 and 86 are new questions for 1985.

Q85 This question is to be asked of spenders only

Q86 Note that this question is asked only where there is a person aged 14-18 in a state secondary school or in Non-advanced further education.

Q's 87-92 from 1985 these refer to children aged 16-24 or over who are not members of the household but who are the children of household members. NB this includes married and unmarried children.

At Q's 83 and 88 EXCLUDE parental contribution towards making up a grant to full amount set.

At Q's 84 and 92 INCLUDE parental contribution towards making up a grant to full amount set.

At Q 87 note that question (b) has been discontinued for 1985 and that Q91 is a new question.

NB WHERE A CHILD AGED 16 OR OVER IN THE HOUSEHOLD HAS FEES PAID BY PARENT OR GUARDIAN IN HOUSEHOLD, ENTER UNDER CHILD'S PERSON NUMBER.

Gifts of money (e.g. pocket money) over and above amounts required for education should be excluded from Q's 83-92 and shown in diary records when given.

Ensure that serial number is entered at top of page 33.

The type of accommodation occupied by the household should be coded eg. if a flat in a detached house code as '9' NOT '1'.

Note that coding should be on the basis of observation, but HOH or wife can be asked.

In addition to the rooms already mentioned at Q12 and 13, it is ESSENTIAL that all other rooms in the rateable unit are accounted for. The reason for this is that

Primary Analysis Branch must be certain that the rateable unit description that you have obtained at Q97 is matched in full by the total number of rooms at Q 12 and 13 and at this question.

When asking this question read out the description of the rateable unit which you have obtained from the rating office at Q97 eg. "house, shop and premises", "bungalow", "flat 1st floor".

Probe carefully to ensure that informants include bathrooms, garages and rooms used entirely for business purposes, as well as living accommodation.

Visits to local authority office

Q. 17, 95-98

A. The following information is required from local authority offices when first working in the area.

1. Gross and net rateable values and descriptions of rateable units. Q95-97
2. Details on O.A.P. concessionary bus fares Q98.

B. The following information is required from local rent or housing office at later call.

Where an informant is a council or new town corporation tenant (Q 16) and receiving 100% Housing Benefit at Q 17 you should obtain the details required at Q 17 from the Housing Dept or other department dealing with rent. This can only be done after the interview. Be careful not to become involved with the housing benefit office because you will find that you are trying to break the confidentiality that exists between the benefit office and the informant. DO NOT NAME INFORMANT:ASK FOR THE TOTAL RENT PAYABLE ON THE ACCOMMODATION,NOT WHAT MR OR MRS 'X' SHOULD PAY.

It should be possible to obtain this information without any difficulty. In 1983 all local authorities were sent a circular by the DHSS explaining that you would be asking for this information. The circular was titled 'Housing Benefit - Statistics (ref HB(83)6) and the relevant paragraph is paragraph VI. You can quote this reference if you have any problems.

If the housing department needs additional reassurance before providing information please obtain the name, position and address of the person requiring information and contact Mr R Redpath or Mr T Kenney at H.O.

Rateable values and description

Q. 95-97

It is essential that rateable value at Q. 95 and Q. 96 relates to the whole of the rateable unit covering the household. This means that in a multi-occupied property what is required is the rateable value for that part of the property occupied by the household to be interviewed. If it is not possible to give the individual rateable value please make a note stating what is covered by the rateable value obtained e.g. whole house, four flats. We also need the total number of rooms (see Q. 94).

You should check the description of the property obtained with the description given by you at Q 93 (See Q94).

This information obtained from the Local Authority office should only be coded on schedules when the household contains men aged 65 or over and women aged 60 or over.

The annual value of tokens or tickets is to be entered; this is the face value (eg. £10 per year) printed on tickets and tokens. If there is not a face value for tokens the concession should be treated as 'Any other type' and specified in full.

These schemes are sometimes run by the local (private) bus company on behalf of the Local Authority in which case information will be obtained from the bus company.

Where a Local Authority provides an alternative to concessionary fares eg TV/telephone/food vouchers, record the travel concession and make notes regarding the alternatives.

Checks at top of page 39 should be completed and details of special circumstances recorded.

THIS PAGE IS COMPLETED BY HEAD OFFICE STAFF.

- a. This schedule deals with income and occupational status. It should be kept by the interviewer and not left with a spender. Information about income is essential if we are to make use of the expenditure details. For this reason one of the conditions under which £5 will be paid to each spender is that we are given details of all the income coming into the household. In practice, this means the completion of Schedule B for each spender while the income of any children under 16 years must be noted at Q.89 on one of the parents' schedules.
- b. Exceptionally, where other people are present, the spender may be allowed to write details of income on the self completion form, but make sure that answers are carefully checked before transferring to income schedule.
- c. An income schedule must be completed for absent members of the household (See 3.9) ie in cases where the household is taken as co-operating but where a member aged 16 and over is absent and is not completing D records. The information should be obtained from the person likely to be in the best position to give it, usually the nearest relative eg. details about the income and occupation of an absent husband should be obtained from his wife. If it proves impossible to get any information, make out a schedule with an explanation as to why it is blank, and write a note about any allowances paid to other members of the household. Since such a person is not a spender the absence of income information for him does not affect the payment of £5 to each spender.
- d. Where informants have any type of joint income an attempt should be made to get them to split the joint income so that income is shown separately on their individual B schedules. This will apply mainly to income from pensions and income from interest and dividends, property, etc. It will also occur where husband and wife are self-employed partners, and in such cases it will be important to give as much detail as possible at Q.36-39 to enable coders to split the income between the partners.
- e. Because Spenders are tabulated in Person Number order, would you please enter Spenders on their Income Schedules as follows.-

When a second spender is entered on an Income Schedule it must be the one with the next Person Number, irrespective of the order of the interview. There must be no gap between the two Person Numbers, unless the missing person is not a Spender.

A husband and wife should be on the same schedule.

Examples of ordering of Person Numbers on income schedule.

- i. Household comprising 3 friends, P1, P2 and P4
(P3 being a child under 16)
Correct P1 and P2 1st schedule
 P4 on 2nd schedule
or P1 on 1st schedule
 P2 and P4 on 2nd schedule
or each spender on a separate schedule

Incorrect P1 and P4 on 1st schedule
P2 on 2nd schedule

- ii. Household comprising P1 HOH
P2 Brother
P3 Wife of P2
P4 Boarder

Correct P1 on 1st schedule
P2 and P3 on 2nd schedule
P4 on 3rd schedule
or each spender on a separate schedule

Incorrect P1 and P4 on 1st schedule
P2 and P3 on 2nd schedule

Please ensure that person numbers, in the form of single digit numbers, are placed at the head of all answer and coding columns, ie 1,2,3 etc NOT 01,02,03 etc.

B Schedule Questions

Detailed points on questions are as follows

Employment Status

Q 1

This question is in the form of a direct question. Informants may need to be asked a series of probes before any code can be ringed. In particular probe to find if they have more than one job for pay or profit. For a Spender with two or more jobs, code the most remunerative only. On FES, informants are coded as working, irrespective of the number of hours worked, as long as the job is regular. Ring one code only per person.

Note that the Government has several training and subsidy schemes in operation at the present time. Individuals on these schemes will normally receive an allowance, but in some cases a wage will be received.

The basic principle to be followed is that if a wage is received, the informant should be treated as an employee. If an allowance is received, the informant is to be treated as unemployed (See Q1(b)). If Enterprise Allowance received, treat as self-employed.

Listed below are the known schemes at time of writing. Later in these instructions reference is made to the main schemes only.

<u>SCHEME</u>	<u>REMUNERATION</u>	<u>TREAT AS</u>
UNITED VOCATIONAL PROGRAMME	WAGE	EMPLOYEE
TRAINING FOR SKILLS PROGRAMME	WAGE	EMPLOYEE
YOUNG WORKERS SCHEME	WAGE	EMPLOYEE
TEMPORARY SHORT TIME		
WORKING COMPENSATION SCHEME	WAGE	EMPLOYEE
COMMUNITY PROGRAMME)		
ACTION FOR COMMUNITY EMPLOYMENT (NI))	WAGE	EMPLOYEE
YOUTH TRAINING SCHEME)		
YOUTH TRAINING PROGRAMME (NI))	ALLOWANCE	UNEMPLOYED
TRAINING OPPORTUNITIES SCHEME	ALLOWANCE	UNEMPLOYED
COMMUNITY INDUSTRY PROGRAMME	ALLOWANCE	UNEMPLOYED
ENTERPRISE ALLOWANCE	FEE + ALLOWANCE	<u>SELF-EMPLOYED</u>

An employee is someone who, at the time of interview, has an arrangement with an employer (another person or an organisation) to work for the latter for a wage or salary. This does not include informants who are on an employer's books and have not yet started work.

Employees who are temporarily away from work due to illness or accident, holidays, strike, being temporarily laid off or short time working should be coded as employees, as long as they have a job to return to with the same employer. If they are going to a new job, they are to be treated as unemployed.

Note: If a wife is on the books of her husband's firm for tax purposes, she should be coded at Q.1 as an employee, regardless of how many hours she works.

Sandwich Student - if a sandwich student has an arrangement to work for an employer, and is attending college or university at the time of interview, he should be coded as an employee (code 1).

Casual or Seasonal Workers - should be coded as employees if, at the time of interview, they are actually working for an employer. If they are on an employers books but not working, they should be coded 3 or 4, ie not employed. (This mainly applies to occupations like market research interviewers, agricultural workers and secretarial bureaux).

Government-Financed Trainees - Where an informant is on a Training Opportunity Scheme (TOPS) (Attachment Training Scheme in NI) or Youth Training Scheme (Youth Training Programme in NI), they are treated as unemployed.

Where an informant is on a Community Programme (CP) (Action for Community Employment in NI) or a Young Workers Scheme, they are to be treated as an employee.

The main point to bear in mind is : Allowance = unemployed, Wage = Employed.

People with a regular but intermittent arrangement to work for the same employer (such as many school kitchen staff) should be coded as employees, even during the periods when they are not working.

Residents employees eg, Au pair, domestics, who are members of the household, should be treated as working in the same way as any other employee.

Employment outside the United Kingdom - where the informant is or recently has been employed abroad, treat as employee. However, be sure to record the currency they were paid in at Q. 11 etc. eg. Marks, Francs, (US) Dollars, Hong Kong Dollars, UK Pounds, etc.

Clergy - Church of England and non conformist ministers should be treated as employees. Jehovahs Witnesses are treated as self-employed.

Directors - A director of his own company is always counted as an employee.

Self employed covers people who are responsible in their work only to themselves and who do not receive a wage or salary from employer. Tax is not normally deducted at source but paid direct to Inland Revenue by them. (Hence directors and managers are employees of their companies).

It includes all people who are temporarily sick but would be working in a self-employed job if they were well.

Self-employment can be for any number of hours, eg as little as one hour a week as long as job is regular.

In addition to obvious persons such as sole or part owners of a business, the following are considered to be self-employed:- doctors in private practice, farmers, landlords who manage their own property, and people with recurring freelance jobs such as musicians or journalists.

Mail Order agents and baby sitters are not treated as self-employed. Instead, income from this source is picked up separately at Q 85 Child minders are treated as self-employed.

Building workers on the 'lump' should be treated as self employed. These workers are usually paid a wage by the contractor and have standard rate of income tax deducted from that wage. They are however responsible for own payment of National Insurance contributions.

Informants who are receiving the Enterprise Allowance are self-employed.

Out of Employment (codes 3 & 4) intending to work

Q 1(b)

Includes people seeking work or people who have an agreement to work but have not yet started.

Those who are unemployed due to sickness but fit in above category should be coded 4.

Those who are sick but would be seeking work if not sick are coded 4.

Seeking work means actively seeking work, eg Registered at Job Centre, employment agency, advertising for work. School-leavers seeking work or about to start should be coded 3 or 4 as appropriate.

Where an informant is on a TOPS (ATS in NI) or YTS(YTP in NI) scheme they should be coded 3.

Questions to be asked of unemployed⁶ regarding

1. Where last job was as an employee*
 - a. Unemployed for 13 weeks or less.
Ask Q4, 4(a), 9-30.
 - b. Unemployed for more than 13 weeks but less than 52 weeks.
Ask Q4, 4(a), 9-24.

- c. Unemployed for more than 52 weeks.
Ask Q4, 9, 10.

2. Where last job was as self-employed.⁺

- a. Unemployed for 13 weeks or less.
Ask Q4, 4a, 9, 9(a), 9(b), 36-41 as appropriate.
- b. Unemployed for more than 13 weeks but less than 52 weeks.
Ask Q4, 4(a), 9, 9(a), 9(b) 36-40 as appropriate.
- c. Unemployed for more than 52 weeks.
Ask Q4, 9, 9(a), 9(b), 36-40 as appropriate.

¶ This includes informants currently on a government training scheme and receiving an allowance. eg Youth Training Scheme (Youth Training Programme in NI), Training Opportunity Scheme, Community Industry Programme.

* This includes informants whose last job was on a government training scheme where wages were received. eg United Vocational Programme, Training for Skills Programme, Young Workers Scheme Temporary Short Time Working Compensation Scheme, Community Programme.

+ This includes self-employed receiving an Enterprise Allowance.

Permanently sick or injured (code 5)

Q 1(b)

Anyone who is unfit to work due to sickness or injury and has been unemployed because of this for more than five years should be coded 5.

Retired (code 6)

Q 1(b)

It is difficult to provide a precise definition of who is to be included in this category. In general the informant's word should be accepted; however it should be borne in mind that the intention is to include only those who at the time of interview, have retired from their full-time occupation, are of the approximate retirement age for that occupation and are not seeking further employment of any kind. Thus women who at a comparatively early age cease work to become full time housewives are precluded from this category.

An informant receiving unemployment pay or an informant who has volunteered the information that he/she left their employment early on a voluntary basis to obtain early private pension is to be treated as unemployed.

(NB It is possible to receive unemployment pay after retirement age if 'retirement' has been waived).

An informant who has left work early on a Government Job Release scheme should be treated as retired.

None of these (code 7)

Q 1 (b)

"None of these" includes:

Housewives with no paid occupation.
(include housewives who are mail order agents or paid baby sitters).

Persons of independent means.

People never employed and not seeking employment.

Continuing students over 16 not employed at time of interview.

Persons unemployed for more than five years and who are not retired, sick or injured (codes 4, 5 or 6).

Paid work in last 12 months

Q 2

This question applies to those coded 1 or 2 at Q 1(a). Work here is to be regular arrangements and not odd jobs. Odd jobs should be entered at Q 86.

Include as paid work any paid holidays, paid sick leave or time on Statutory Sick Pay. Exclude periods when on strike.

Away from work

Q 3

This question applies only to employees. Code Yes ...Y if absent from work on what, for the informant, is a NORMAL WORKING DAY.

Weeks away from work and weeks of paid work

Q 4

This refers to the total number of weeks away from work without a maximum. As students and school leavers will not have had a job, they are excluded from this question. We are interested in the total number of weeks the person has been away from work: if it is 3 years then 156 weeks should be entered. Do not restrict answers to the last 12 months.

Q 4(a) applies to all answering less than 52 weeks to Q4. Work here refers to regular arrangements and not odd jobs. Odd jobs should be entered at Q 84.

Include as paid work any paid holidays or paid sick leave or time on Statutory Sick Pay. Exclude periods when on strike.

Year of retirement

Q 5

This question applied only to those meeting the retired persons' conditions at question 1, code 6.

At (a) give date in full eg 25th May 1984.

Informants unable to work etc

Q 6-8

It is vital that informants answering Q.8 (a) are asked 8(b) and 8(c)

Looking after sick or aged relative

Q 6

A relative for the purpose of this question must be someone related legally or by blood relationship eg husband/wife, father/son. An adopted child is a legal relation whereas a foster child is not a legal relation. Where a couple are cohabiting they are considered not to be legally related (for the purpose of this question only).

Permanently unable to work

Q 7

The term 'permanently unable to work' is the informant's interpretation which should be noted at Q.7 (a). NB. This can be an embarrassing topic and should not be probed too deeply.

Paid work in last 12 months

Q 8

If less than one week in the last twelve months please note the number of days.

Work at this question applies to regular arrangements to work and not odd jobs. See Q 84 for details of odd jobs.

Note that usual net pay and period covered by pay is required at 8(b) and 8(c). Include as paid work any paid holidays or paid sick leave or time on Statutory Sick Pay. Exclude periods when on strike.

Most remunerative and subsidiary employment

Q's 9(a) & 9(b)

It is important that where there is more than one job the informant's most remunerative job - whether as employee or self-employed - should be entered as the first job.

Where someone has arrangements to work with two different employers (even if one relates to casual work), both should be entered, with the most remunerative job described first. If an informant performs the same occupational duties for several employers, (occupation and industry details being identical for each eg domestic work for 3 private individuals), count as one job but make a note.

Where a school leaver is unemployed, employment questions cannot be asked.

PRECISE OCCUPATION AND INDUSTRY DETAILS ARE NEEDED. Follow standard Social Survey procedure (Handbook p. 65). Note however, that directors count as employees even if they pay a self-employed person's National Insurance contribution. If such a person has been coded self-employed at Q.1, you should recode.

For informants on Community Programme (CP) (ACE in NI) note this fact and also the work they are doing and the type of industry in which that work is being done.

Pay/hours of work

Q's 10-24

This series of questions refers to the job described in Q. 9 as the most remunerative job as an employee, regardless of number of hours worked. These questions can relate to a past job only where the informant is out of employment and seeking work or about to start work (coded 3 or 4 at Q.1).

If someone has only recently started work and has not yet received any wages/salary, explain this in a note together with what he expects to receive in his new job, and give details of his pay if the first pay is received during the record-keeping period. Failing this, give details of his wage/salary in his previous job (if any).

At the foot of the coding column on page 7, there is a provision for recording the gross wage/salary according to the last pay slip, if consulted. This figure should not be your addition of the net pay and deductions. (This information can then be cross checked against the gross you arrive at when checking pay details on the checking schedule). Gross pay should include superannuation.

Maternity pay: if last pay was Maternity Pay this should be ignored and last full pay entered. See Q 63 regarding Maternity Pay.

Note that if the informant has two jobs with the same employer and the pay for both jobs is received together, an estimate of the separate amounts (net/gross) should be obtained.

Where, for personal reasons, an informant is not willing to orally divulge information on pay, they should be asked to fill in a self completion sheet with your guidance as necessary. This information should then be transcribed on to the income schedule.

Date last paid and period pay covered

Q 10 & 12

Where the difference between date of interview and date last paid is longer than the pay period given at this question, give reason. Eg Informant who is weekly paid is interviewed on 4/5/84. They state that they were last paid on 20/4/84 ie over two weeks before interview. The reason given for this is, that when last paid on 20/4/84 they were paid three weeks money to cover their holiday period and therefore they were not paid on 27/4/84 or 4/5/84.

Last net wage or salary received

Q. 11

Amount at this question must include OVERTIME, BONUS, COMMISSION AND TIPS.

If tips are received separately, note this fact and the amount received.

From April 1983, employers have been paying the first eight weeks' sick benefit in any tax year. This benefit is not pay and is known as Statutory Sick Pay and details should not be entered at Q.11-15 (see Q.52).

Refund of tax

Q. 13

A refund of tax indicates that the pay at Q's 11-16 is not usual pay.

Tax payment

Q. 14(a)

If no tax is paid there will be a reason, eg the earnings are too low to pay tax, or a refund has been received. The informant may not know the reason so do not probe too deeply.

Deductions from wages

Q. 16

Purpose of Deduction: Show each individual deduction and amount separately. If it is impossible to show separate amounts, try to establish what is included in composite deduction's eg. superannuation, union dues or savings.

Probe individual deductions carefully, eg.

"Insurance" - Is it life, sickness or accident insurance?

"Benevolent Fund" - is this a payment to a charity or some form of insurance and, if the latter, what kind?

Please note that initials are not acceptable. Eg. FSC could be Family Sailing Club, Family Savings Club, Family Sick Club, Family Social Club, Family Sports Club.

Please ensure answers are entered in correct columns and that there is only one amount per coding box.

Pay slip consulted

Q. 16(a)

If pay slip for the date given at Q 10 is consulted ring code 1 or 2. If the pay slip for that date is not consulted but the answer to Qs 11-16 are given for the date at Q 10, code 3. If a pay slip for a date other than that at Q 10 has been consulted by you or by the informant, code 4.

Note that for 1985 this is a question.

If coded 1, 2 or 4 ask for (or enter) gross wage from pay slip.

Do not add totals at Qs 11-16 if gross wage is not shown on pay slip or code 3 has been ringed.

Hours worked

Q. 17-21

This is not always the number of hours paid for, eg. one hour at time and a half should be counted as one hour, not one and a half hours.

Include any paid hours away from work due to holidays and sickness, but exclude meal breaks.

If the number of hours given at Q. 19 or 20 differs from the number of hours at Q. 17, then an amount will normally be expected at Q.23 for usual pay. If this is not the case, check whether the answers to Q. 17-22 are correct and amend or note reason for apparent inconsistency (eg. not paid for overtime).

Where a person is on a shift system, a note is to be made regarding the length of their shifts, wages per shift and rotation of shifts. If last wage affected by any of the details listed, then a usual wage is to be expected at Q. 23. If otherwise, please add notes why last pay is usual.

Where last pay was different because of a pay rise, then the usual pay at Q. 23(a) and 23(b) should be the pay FOLLOWING the rise.

Usual hours

Q. 17

Usual hours are not the same as basic hours. If hours excluding overtime vary within a regular pattern (eg 40 hours one week on day shift and 48 hours next week on night shift), note the average weekly hours (in this case 44).

Note that this question excludes all overtime.

Average amount of overtime

Q. 18

Note this question refers only to paid overtime.

Actual hours - weekly paid

Q. 19

The number of paid hours worked, including paid overtime should be entered here.

Actual hours - other pay periods

Q. 20

Where possible it should be ensured that the number of hours worked per week has been given, and not the total hours for the period covered by the pay.

Items affecting last pay (prompt card 'A')

Q. 22

Informants who have received state benefit because of unemployment could be liable to tax on this benefit. This tax is collected by a lump sum deduction or through weekly/monthly PAYE deductions from pay when restarting work.

Receipt of Statutory Sick Pay can affect income.

Usual pay

Q. 23

If there is a variation between the hours usually worked (Q.17) and the hours for which last paid (Qs 19-21), or a code has been ringed at Q 22, the informant would be expected to answer NoX at Q 23 and usual pay given at Q 23(a) and (b).

Occasional additions to pay

Q. 24

This amount should cover the total additions to pay received in the last 12 months. Code last column if answer to Q. 23 is 'No'. Include here only actual money income (cash, cheques, bank credit, etc). Exclude shares in the company or cash value of vouchers to spend in shops.

Thirteen week rule

Q. 25-30

These questions do not apply if informant has been sick, injured or unemployed for more than 13 weeks at time of interview.

Amount of tax relief

Q. 25

Enter the amount on which tax relief has been allowed, not the actual amount of tax relief received. This amount is shown on the Inland Revenue notice of coding. Please list items covered by tax relief.

'A' schedule expenditure refunded by employer (prompt card 'B')

Q. 26

Here it will be necessary to refer back to 'A' schedule amounts when prompting.

Other expenditure refunded by employer

Qs 27-29

Please note that questions on expenses are restricted to those received from the

current (or last) employer.

Where an informant states at Qs 27-29 he has items of expenditure refunded, it is to be expected that similar expenditure shown in D records will also be refunded and should be entered on page 20 of record books.

If a fixed or mileage allowance for vehicle has been received, then page 20 of record books should contain details of refunded expenditure on petrol etc. which will be refunded via the allowance paid.

Fixed or mileage allowance

Q. 27

Fixed allowance is a specified set amount per week or month etc., paid regardless of amount vehicle is used.

Mileage allowance is a specified amount paid for each mile vehicle is used (eg 25p per mile). The mileage will vary from week to week.

Specified car expenses

Q. 28

The amount included in last net pay should be entered.

Other refunds/allowance from employer

Q. 29

Include only amounts actually refunded. If a subsistence allowance is received, only the part actually spent on food, lodgings, etc should be included.

Luncheon vouchers/meals supplied free

Q. 30

LUNCHEON VOUCHERS: These refer to luncheon vouchers used by the informant AND supplied by informant's employer.

MEALS/FOOD: Any free meals to resident employees, eg. au pairs or farm workers, should not be entered here.

If neither meals nor food are provided free then the 'No to both' code should be ringed.

Subsidiary employment

Q. 31-34

These questions are, essentially, replicas of Q's 10-16 but are for entering details of a subsidiary job where this is held as an employee.

Deductions from pay - subsidiary employment

Q. 34

Enter here tax deductions or National Insurance contributions as well as any other deductions from pay. Initials are not acceptable and name of deduction must be given in full.

Refunds of expenses - subsidiary employment

Q. 35

See notes at Q. 29 over.

Self employed

Q. 36-40

Where an informant has not yet been self employed for a full year you should obtain figures for the period he has been self employed AND note dates covered. Also, obtain details of income in previous occupation.

Give loss figure, if this is appropriate, and note any explanations given by informant, eg loss, but only after taking out own money.

N.B. IF A LOSS OR NIL PROFIT IS GIVEN AT Q. 36 ASK Q. 37.

Total turnover

Q. 38

Is asked of all not giving an answer to 36 or answering 'Don't know' to Q. 37 (a) or Q. 37 (d).

Self employed - sole ownership/partnership

Q. 39

Is asked of those answering Q. 36 or Q. 38. If informant unable to give a figure, then obtain a percentage or proportion of the amount he expects to receive.

'A' schedule expenditure claimed for tax purposes (prompt card 'C') Q. 41

Q. 41 deals with business expenses claimed by self-employed people for tax purposes, in regard to expenditure contained in or related to the household schedule, and relating only to interview address accommodation. Generally, the informant, or his accountant, will agree with the Inland Revenue that a certain percentage of his expenditure on an item should count as business expenditure for tax purposes. It is these percentages that should be noted in the box. If the amount has not been agreed, indicate which items will be claimed and enter estimate of claim. DO NOT LEAVE BLANK - CODE 'No expenditure claimed' if answer is 'No' to all items.

Where a self employed person claims items of expenditure for tax purposes it is to be expected, that if similar expenditure is recorded in the diary records, this should also appear at page 20 of the diary records as claimed as business expenditure.

If expenditure has been claimed but informant cannot give percentages then

- a. Ask for amount claimed and total expenditure on the item concerned, eg electricity claimed = £35 p.a. on a total expenditure of £200 p.a.
- b. If amounts cannot be given please ask for which items a claim has or will be made. Indicate these on the schedule.

Expenses refunded by an organization for unpaid work

Q. 42

Items covered by an allowance should be shown separately with actual or estimated amounts set against each, eg stationery £2, stamps £3.

If similar items to those mentioned at this question appear in the diary records, they could be expected to be entered on page 20 of the 'D' books as expenses refunded.

National insurance (N.I. contributions)

Q. 43

NOTE FILTER BASED ON AGE AND EMPLOYMENT STATUS

Q. 43 is asked for everyone coded 2-7 at Q1 on the B schedule.

Do not include lump sum payments of N.I. contributions by self-employed, non-employed or those making up contributions, these should appear at Q. 89

Allowance, benefits, pensions (prompt cards 1-6)

Qs 44-66

SEE LIST AT END OF THESE INSTRUCTIONS FOR METHOD OF PAYMENT.

See glossary for information regarding benefits and additions to benefits.

It is important to exclude Supplementary Benefit from these items although they may include earnings related supplement or additional pension.

All Supplementary Benefit should go as a separate amount at Q.60. When the informant has a payments book, there should be a note at the front of the book which makes it clear how much of the payment is Supplementary Benefit. However, in cases of benefits that have Supplementary Benefit added to them, you may need to probe, to the best of the informant's knowledge, how much of the total weekly amount received was basic benefit and how much was Supplementary Benefit (Q.60).

The amount of benefit last received together with the period covered is required at all benefit questions. Note that payments are made in multiples of a week eg 2 weeks, 4 weeks, 13 weeks.

NI retirement pension

Q. 45

Job release allowance should not be treated as NI retirement pension and should be entered at Q. 65

We have been asked by the DHSS that Retirement Pension at Q45 be probed especially for the possible inclusion of Attendance Allowance, which ideally should be separately entered at Q50. We have been told that Attendance Allowance is shown separately in the Retirement Pension payment book.

Severe Disablement Allowance/Non-contributory Invalidity Benefit Q. 49

From November 1984 to November 1985 Severe Disablement Allowance will be paid to those ages 16-34 and 50 to retirement.

Non-contributory Invalidity Pension and Housewives Non-contributory Invalidity Pension will be paid to those aged 35-49.

From November 1985 the non-contributory invalidity pensions will be replaced by Severe Disability Allowance.

Housing Benefit/rebate/allowance Q 50

This is a new question for 1985 and is asked of all except HOH. This is because it is possible for other members of the household to receive these benefits. The questions are asked on the income schedule of all spenders EXCEPT the head of household who will have been asked the question on Household Schedule.

Statutory sick pay, NI sickness benefit, invalidity pension Q. 52-54

Since April 1983 there have been three 'sickness benefits'

- a. Statutory (or Initial) Sick Pay)
- b. NI Sickness Benefit) SEE GLOSSARY
- c. Contributory Invalidity Pension)

They are paid in the following order. Statutory Sick Pay usually paid by employer (8 weeks) - NI Sickness Benefit (20 weeks) - Contributory Invalidity Pension (period unlimited).

If an informant therefore, is receiving/ has received one of the later benefits, he or she should have also received one of the earlier benefits providing he or she is or was an employee. The maximum number of weeks for any combination of benefits in 12 months is 52 weeks.

Do not enter gross pay at question 52, only gross SSP.

Sick pay by employers Q 55

This question is designed to help ascertain total income received by informants when absent from work due to sickness or injury.

Sick pay by employers refers to made up pay, part pay etc, and not Statutory Sick Pay.

EXCLUDE FROM THIS QUESTION CP (AGE IN NI), ALSO ENTERPRISE ALLOWANCE. THIS QUESTION REFERS TO TRAINING SCHEMES TREATED AS CODE 3 AT Q 1(b).

If a person is currently on a scheme/programme enter the number of weeks completed to date at (b). The number of weeks entered at (b) should exclude any weeks entered at Q. 58(a).

Unemployment benefit/currently received

Q. 57

If informant is currently receiving Unemployment Benefit at time of interview check that they are coded 3 at Q. 1. If not coded 3, recode and ask all relevant questions.

This question excludes benefit for weeks spent on TOPS and YTS schemes etc.

Unemployment benefit and details of the weeks unemployed before or after attendance on a TOPS or YTS scheme, etc should be entered at this question.

Supplementary benefit

Q. 60

Supplementary pension/allowance should be entered at this question whether received on its own or in combination with another benefit.

Payment of household bills directly by supplementary benefit should be entered as part of Supplementary Benefit. Note how much of the payment was in fact paid direct.

Maternity benefits and pay

Q. 61-63

Note that these questions are asked only of women aged under 51.

Maternity pay

Q. 63

The answer to this question should refer only to maternity pay under the Employment Protection Act; it should not include holiday pay, money in lieu of notice, sickness benefit, maternity grant, etc.

OTHER STATE OR NI BENEFITS

Q. 65

This question covers all State Benefits not covered by previous questions. Possible entries here are:

- i. Job Release Allowance
- ii. War Widow's Pension

- iii. Industrial Widow's Pension
- iv. Guardian's allowance
- v. Industrial Disablement Benefit (paid weekly).
- vi. Enterprise Allowance

NB. Allowance for foster children should appear at Q.77

Always give full details of benefit including government department concerned.

Christmas bonus Q. 66

Christmas bonus is paid to retired persons and certain other people on state benefit. This is normally paid in November in the form of an increased weekly payment, i.e. it is not usually made as a separate payment, but as an increase in benefit being received at the time.

Redundancy payments Q. 67

This does not include money in lieu of notice, Severance Pay or a 'golden handshake'.

Pension from previous employer Q. 69

Industry must be specified in detail and, where possible, name of company given.

Note: please ensure that columns are ringed as appropriate.

Pension as member of trade union or friendly society Q. 70

Do not include pension as an employee at this question.

Other deduction from an employee pension Q. 73

This is a new question for 1985.
Normally income tax is deducted from an employee pension (Q 69). However, some pension funds agree to deduct other payments from pension eg medical insurance premiums, savings.

Ensure that this question is asked of all receiving a pension at Q 69(a)(b) and (c).

Q74 asks which types of savings accounts have been held over the past 12 months.

Q75 is concerned with interest received or credited to the account over the past 12 months.

If interest not known or cannot be estimated, the informant may volunteer the amount in account. This should be noted.

Show joint accounts in one column with the person numbers combined, eg 1 and 2, 2 and 3.

Where a person has an account at Q74 but has not received or been credited with interest at Q 75, enter person number, code from Q74 and write 'NIL'.

Please ring documents consulted codes at Q.75

Holdings of Nat Sav. certs/SAYE/premium bonds (prompt card 'E' & 'F') Q. 74

Note that for 1985 the amount of money held (in ranges) in each type of savings should be recorded as well as person number of investor.

Holdings of certain National Savings investments are asked for two reasons: first to help the DHSS determine whether informants are eligible for Supplementary Benefit or not: second, to provide the Dept. of National Savings with information about holders of National savings investments.

Bonds and securities (prompt card 'G')

Q. 77

If the informant does not know the amount of interest, it would be helpful to have an idea of the amount of principal invested, if this is volunteered.

At Q. 77(ci) the amount should be after tax. In rare cases, where only the gross before tax is available, then record this amount and a note stating 'gross only available'.

Please ring documents consulted codes at Qs 77(b)(i) and 77(c)(i)

Rent from property

Q. 78

Include here all rent from let or sublet property except that connected with self employment, which should be entered at Q. 36 Income Schedule.

Regular allowances received (prompt card 'H')

Q. 79

This question covers allowances from someone in Armed Forces, Merchant Navy, friend or relative outside household, organisation, alimony or separation allowance and allowance for a foster child.

NOTE THAT FOR 1985 'EEC TRAINING ALLOWANCE' HAS BEEN ADDED TO LIST.

Exclude allowance from spouse who is not a member of household or who is an absent spender (see Q. 80)

SEE ALSO 3.10(b)

Allowance received or bills paid by non household member or absent spender

Q.80

This question applies to all absent spouses, ie husband or wife, regardless of whether proxy income data is recorded elsewhere on the schedule for the absent spouse.

SEE ALSO 3.10(b).

Money received for items of regular household expenditure (prompt card 'J')

Q. 81

This question refers to cases where informant is regularly GIVEN cash or cheque, etc. to pay a bill in part or in full. Note that period covered by payment is required. (eg electricity = quarter).

See note re. prompt card at Q.82

Direct payment of regular household expenditure (prompt card 'J')

Q. 82

This question refers to cases where informant DOES NOT RECEIVE cash to pay bill, but has the item paid regularly on their behalf direct by someone outside the household. An example is where a mother in the FES household has her rent paid for by her a son who lives in a separate household. Note period of bill paid is required. (eg electricity = quarter).

NB The prompt card is a guide only, and informants may have items paid for or receive money towards items not included on card.

Payments by Supplementary Benefit should not be entered here. (See Q. 60)

Coal or coke from employer

Q. 83

This refers to coal or coke received from a present or former employer, eg NCB, Pilkingtons.

Record whether it was ordinary household coal or, if a special fuel, give the name eg Phurnacite, Stovesse, Gloco, Sebrite, Coalite, Rexo, Warmco, Cleanglo. If cash is taken in lieu of fuel, indicate how much cash has been received.

If fuel is free but haulage paid for, note amount paid for haulage in previous 12 months.

Concessionary bus passes/tokens/tickets

Q. 84

Exclude weekly or season tickets mentioned in household schedule. Data collected for Q. 95 household schedule can, if necessary, be used to prompt this question. If the area does not have concessionary bus pass travel, the answer should be 7.

Mail order agents/baby sitters

Q. 85

If income is received for work as a mail order agent and as a baby sitter, enter combined total at (a).

NB. Child minders should be treated as self employed. (See Q36)

Income from occasional jobs

Q. 86

Only odd or occasional jobs should be entered here. If a job appears to be a recurring undertaking, regardless of hours worked, then the details should be entered elsewhere in this schedule, eg, Qs 9-30 for employee main job; Qs 31-35 for employee subsidiary job or Qs 36-40 for self-employed jobs.

If informant intends to undertake the job again in the future please note this fact.

Students holiday jobs should not be shown here but at the relevant section dependent upon their present situation.

Tax paid direct to inland revenue

Q. 87

Do not enter amounts of tax here that are duplicates of tax payments elsewhere on the schedule, or are in respect of interest from stocks, shares etc at Q. 75(a) and (c).

Note this does not include Value Added Tax (VAT).

Income tax refunded direct by inland revenue

Q. 88

Tax refunds received through pay are not to be included at this question (see Q.13).

Direct refunds of tax previously paid by employees under Pay As You Earn (PAYE) are normally due to change of circumstances, eg unemployment, redundancy, retirement, mortgage or marriage.

Payment of NI contribution direct to Inland Revenue

Q. 89

This will apply mostly to self-employed people, who usually pay a basic weekly rate of National Insurance, and, at the end of the financial year (when profits or losses are calculated), pay a percentage of the profits.

Informants may, however, be making up missing contributions, even though employed or non-employed. Record all cases and the reason for payment at Q. 89.

Voluntary contributions when they are paid regularly (ie not a lump sum), should be entered at Q. 43 and not at this question.

Money sent abroad

Q. 90

Information collected at this question is to give an indication of money being sent out of the country. This information was previously collected by the Bank of England under exchange control regulations. It may be useful to point out to informants that we do not ask to which country the money is being sent.

Only money actually sent abroad should be entered. Money given to an individual or charity in this country and subsequently sent abroad (eg Oxfam, Christian Aid) should not be entered.

Estimates are quite likely at this question; this is acceptable and preferable to a 'dont'know'.

Amount recorded should be in £ sterling.

Children's income

Q. 91

Income of children under 16 is asked of the parent/guardian, to ensure that we get the income of the whole household. Include any regular income, however small, eg from a newspaper round. Child's Benefits are not the income of the children; include these at Q.44 of the mother's schedule. Pocket money or gifts of money etc should not be accepted here as income.

- a. Credit card account payment sheets should be left with each informant who has a credit card (code 14 ringed at Q. 72 household schedule).

Code 'Y' should be ringed on the front page of both record books if an informant has a credit card. Code 'X' should be ringed if informant does not have a credit card.

There should be two sheets per credit card account, ie one sheet per account per week; eg if informant has Barclaycard and Access card, leave four sheets, 2 sheets at the interview call for the first 7 days, and 2 sheets at the first checking call for the second 7 days.

- b. Please ensure that the full reference number has been entered on each sheet; also that the person number has been entered; finally that the week number has been ringed.
- c. If a credit card account (bill) is paid in part or in full during the 14 days of record keeping, the spender making the payment should complete a payment sheet in full as detailed below:

- i. Front of sheet - This should contain all details recorded on account EXCEPT items or services acquired during the period of the account. It should also include the amount paid in the record keeping period and the date the payment was made. (See example on next page).
- ii. Back of sheet - The account will show the organisation from which the item or service was obtained. The actual item or service is required on the back of the credit card sheet, and the name entered on the account should act as a prompt for this (see examples on next page). Remember only items purchased or acquired during the period of the account being paid AND shown on the account should be recorded.

You should code '1' (paid) on the front of the diary record for the week in which payment was made.

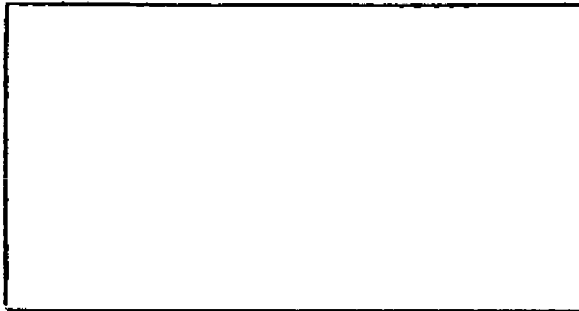
- d. If a payment is not made during a 7 day period code 2 (Not Paid) in the box provided, on the front page of the relevant D record book, ie a separate code each week.
- e. In returning the field documents, please place the 8835C sheets in front of the relevant Income Schedules (see 'Return of Work - Order of documents').
- f. The credit card sheet is treated as an extension of the diaries and therefore all checks carried out on the diaries should also be carried out on entries on this sheet.

NB Please note that some credit card account payments are made by standing order. If the standing order is paid during the 14 days record keeping period, this must be treated as a normal cash payment of account, ie a 'C' sheet should be completed.

EXAMPLES

1. BARCLAYCARD

DATE	REFERENCE	DETAILS	AMOUNT
22 SEP	644165	PERCIVAL CAMERAS LONDON SE18	9.65
10 OCT	411527	TALLY-HO GAMES LONDON N12	2.60



PRESENT BALANCE £12.25
CREDIT LIMIT £600

MINIMUM PAYMENT £5.00
TO REACH US BY 11 NOV 82

In this example there is no previous balance and no interest.

2. ACCESS

Date			Reference number	Description	Previous Balance
					389.01
12	08	82	J4645X	MUSIC DISCOUNT CENTRE, LONDON W1	4.50
02	09	82	K47DMO	WORDS AND MUSIC, LONDON SW15	17.90
03	09	82	K76M03	MUSIC DISCOUNT CENTRE, LONDON W1	4.50
04	09	82	LBXSSY	PAYMENT - THANK YOU	100.00 -
05	09	82	LLDIHT	B R WATERLOO, LONDON SE1	11.15
					8.64
					New Balance
					335.70
					Minimum Payment
					50.36

MINIMUM PAYMENT TO REACH US BY 16/10/82

In this example there is a previous balance of £389.01 and interest of £8.64.

- ∅ = Entries marked ∅ are entered on the front of the credit card sheet (S833C)
- * = Entries marked * are itemised on the back of the sheet (IE THE ACTUAL ITEM OR SERVICE ACQUIRED).

The order of diary headings is as follows;

1. Left hand page
 - a. Food and drink brought home.
 - b. Take away meals brought home.
2. Right hand page
 - a. Meals, snacks and non-alcoholic drinks bought and consumed away from home.
 - b. Beer, wine, spirits and other alcoholic drinks bought and consumed away from home.
 - c. Cigarettes, tobacco, newspapers, magazines, books and postage.
 - d. Fuel, light, household goods, cleaning materials, furniture.
 - e. Travel by rail, bus, air, taxi, motor vehicles, cycles etc
 - f. Clothing, clothing materials and footwear
 - g. Any other payments.

ALL EXPENDITURE SHOULD BE RECORDED IN DIARY RECORDS EVEN IF ALREADY RECORDED IN HOUSEHOLD SCHEDULE (EG ELECTRICITY BILL).

Each booklet should be the spender's own record. It should be filled in by the spender although you should assist in dealing with any difficulties. Emphasise that the booklet is confidential to the person completing it. Occasionally someone will insist on keeping details on separate pieces of paper, and later ask you to copy them into the booklet. You should emphasise that it is the individual's own account of their expenditure that is required, and try to persuade them to use the booklet. If you have to make entries in such cases, explain how this happened on page 23 of the booklet for week 1; and, if you can, attach the individual's own notes. If difficult cases, make additional calls.

A blind person, or anyone unable to write, should be treated as a spender, but their records will have to be kept by someone else in the household. You should then assure yourself of the general accuracy by going through them with the spender in question, noting that this has been done on page 23. Alternatively, you may keep the records yourself for the spender in question, but this will necessitate calling every day.

Points to remember when leaving booklets

D.1

Before leaving each booklet with a spender you should.-

- a. Ring the seven-day period: code 1 or 2 in the upper left-hand corner of the front cover.
- b. Fill in the area, serial, household and person numbers. For serial numbers 01-09 remember the leading zero. For person numbers enter

1-9 as a single digit.

- c. Head each of the seven double pages with the date in full and ring day of the week.
- d. Enter the starting date of the first week's book on page 1 of the A schedule.
- e. Enter a day, date and time for the next call on front cover.
- f. Ring Y if credit card held or ring X if no credit card.

General Points

D. 2

It is not necessary to explain all of the points mentioned below when leaving the record books. You should, however, ensure that the books are completed in sufficient detail when you make your 5th day and final checking calls.

- a. Each item should be entered on a separate line and individually priced. (Grocery bills pinned to the appropriate page must be itemised and copied into the record book before posting it to the office). Continuation pages are supplied for use when it is found or expected that a shopping list will cover more than one page.
- b. All amounts of money spent during the two weeks must be entered, including money spent on those items already entered on the household schedule.
- c. Only money paid out by the household should be recorded. Goods acquired but not yet paid for (eg budget account) should not be shown except where a grocery account is involved (see below D3).
- d. Where luncheon vouchers are used, record the total cost, eg meal costs £2.50, luncheon vouchers used have value of £1, additional cost £1.50 - Record £2.50.
- e. See D12 for procedure in special circumstances.
- f. Make sure that £ and p signs are not written in and that all entries are within the columns. Make sure the 'office use only' column is left blank.
- g. The notes on pages 2 and 3 should be brought to the informants attention.

Food and drink brought home - (except take away meals, meals, out etc) D.3

This includes food and drink taken into another person's home (eg for a party).

- a. For meat, fish, fruit and vegetables we need:
 - i. Type - eg pork, beef, cod, apples, peas.
 - ii. Whether it was bought fresh/raw, frozen, tinned, dried, bottled, cooked etc.
- b. Baby food: Itemise type of food, eg dried milk, rusks, cereals, tinned or bottled foods.

- c. Milk bill: Is it milk or does it include eggs, cream etc? If so, itemise. If only milk, state this beside entry, for example "milk bill (milk only)".
- d. Bread bill: Itemise cakes and bread separately, or note "bread only".
- e. Alcoholic drink: Itemise type of drink, eg beer, wine, sherry, vermouth, spirits, etc (brought home).
- f. Soft drinks: Note whether squash or fruit juice (brought home).
- g. Grocery accounts: On the regular commitments sheet, you should check whether the account will be paid within the record-keeping period.

If not paid: no information is required.

If paid: check whether the informant can list each item and price separately.

- i. If can itemise: on the day the bill is paid list each item purchased on the account on a separate line. (NB you may, in some cases, have a whole month's groceries listed).
- ii. If cannot itemise: on the day the account is paid, the informant should enter the total amount of the grocery account with a note indicating that the bill cannot be itemised. The informant should also note down on each day any items obtained on this account. Where possible, he/she should also enter the amount to be paid for the purchase to the left of the £ p column, and note that the goods are "on account".
- h. Food acquired on credit card. If the informant acquires food by credit card in the 14 days then all items should be shown as usual with the words 'CREDIT CARD' written beside them. THIS IS THE ONLY TIME CREDIT CARD ACQUISITIONS SHOULD BE RECORDED IN DIARY.

Take away meals brought home

D4

Any take away meals, eg fish and chips, Indian, Chinese food, hamburgers, fried chicken, which have been prepared at a catering establishment and brought home for consumption should be entered under this heading.

For 1985 the informant should note whether food brought home was bought hot by writing 'HOT' beside entry; VAT is now charged on HOT take-away meals.

Meals on wheels should be entered under this heading.

Where luncheon vouchers used, see D 2(d).

Meals, snacks, sweets, ice cream, etc bought & consumed away from home

D5

This section has two main headings which divide meals/snacks/sweets/non-alcoholic drinks/ice cream consumed away from home by where they were bought, ie at workplace or elsewhere.

- a. Food bought at workplace: This includes meals/snacks/sweets/non-alcoholic drinks/ices bought at any workplace, not only one's own workplace (ie include items bought at a workplace being visited).

Items bought at works canteen, staff dining room, staff tea clubs, staff rest room, staff tea bar, staff vending machines, etc. can be included under this heading.

- b. Food bought elsewhere

For 1985 the informant should note whether food in this section was bought hot by writing 'HOT' beside entry.

This would be other meals/snacks/sweets/non-alcoholic drinks/ices bought and consumed away from home.

Items bought at restaurant, cafe, hotel, public house, snack, bar, fish and chip shop, cinema, cake shop, kiosk, railway station, race course, exhibition, school shop, tuck shop, etc. can be included under this heading.

Code 1 should be ringed if the food was eaten on the premises where bought, eg consumed at table in restaurant.

Code 2 should be ringed if the food was eaten away from the premises where bought, eg. chips or ice cream bought at shop and eaten on the street, bar of chocolate bought at kiosk and eaten on street.

NB. For food bought and taken home see D4.

- c. Tips and service charges

These should be included in the cost of the meal.

- d. Alcoholic drinks bought and consumed with meal

Cost of alcoholic drink bought and consumed with meal should be shown separately in section headed - BEER, WINE, SPIRITS and other alcoholic drinks bought AND CONSUMED AWAY FROM HOME, with the words 'with meal' written beside the entry.

Itemise separately beer, wines, vermouth, sherry, port, tonic wine, madeira and spirits etc.

IF NO ALCOHOLIC DRINK TAKEN WITH MEAL, 'NO ALCOHOL' SHOULD BE WRITTEN BESIDE THE 'MEAL OUT' ENTRY.

If alcoholic drink taken with meal, but amount spent cannot be itemised, write beside meal out entry 'amount for alcohol not known'

Alcoholic drinks bought and consumed away from home on their own should be entered in the section headed ALCOHOLIC DRINKS 'Beers, wines ... etc' (See D6).

- e. Soft drinks

Soft drinks consumed away from home should be recorded in either part 1 or 2 meals out section.

f. Snacks

If a snack is purchased please itemise, eg cheese roll 25p, cup of tea 18p.

Beers, wines, spirits and other alcoholic drinks bought and consumed away from home D6

Alcoholic drinks taken with meals should be entered here. (See D5).

Itemise separately beer, wine, vermouth, sherry, port, tonic wine, madeira, etc (See D3 and D5 for soft drinks).

Cigarettes and tobacco, newspapers magazines, books, postage D7

a. Newspaper bills

Itemise newspapers and magazines.

b. Postal Order

If a postal order is purchased during the record-keeping period, the value and poundage should be shown on separate lines.

If the postal order is used during the record-keeping period, note what it is for and date used.

EXAMPLE

Postal order - Receipt book - posted 11th January 75p
Poundage 20p

If not used during record-keeping period note this fact.

EXAMPLE

Postal order - not used - 75p
Poundage 20p

NB. It is essential that any postal orders recorded in first book, and not used by end of first week, should be checked by you at the end of second week.

c. Note whether tobacco is for pipe or cigarettes.

a. Fuel and light

Watch for amounts set aside to pay future bills. These should be noted as 'set aside'.

Slot meter payments - note whether for gas, electricity, etc.

If coke or other smokeless fuel, obtain brand names.

b. Household goods and furniture

Note whether new or second hand and whether powered by gas or electricity.

Spare parts - probe what for, eg 'burner for gas cooker'.

Travel by rail, bus, air, taxi - motor vehicles, cycles, etc

a. Expenditure

State whether by bus, rail, tube, etc. Season tickets: state mode(s) of transport involved, then check if shown at Q. 64 Household Schedule.

Bus and train fares should be probed to check whether school fares. If they are, write "school fares" beside them and check Q82 on Household Schedule.

Garage bills: itemise petrol, oil, labour, parts, accessories, VAT etc.

Amounts paid for petrol, diesel oil and other materials must be shown individually.

Spare parts: probe what for, eg 'battery for car'.

b. Refunds

Note items refunded and check page 20 of record book and questions 26-29, 35, 41 and 42 in income schedule.

Petrol refunds: note if additional to any mileage allowance received.

Clothing, clothing materials and footwear

For clothing and footwear give person number of wearer. If wearer not in household note whether for adult or child, male or female. If child, give age.

a. Lessons

If payments are recorded for lessons, eg driving, music, check whether this is FIRST lesson; if not ask Q. 84 on household schedule. If it is first lesson, write 'first lesson' against entry.

b. Gifts and presents

i. If gift/present is not cash specify the item purchased.

ii. If gift/present is cash to another household member write 'cash' beside entry and note person number of person the money is given to, eg 'cash to P2'. If person is under 16, note what money was spent on, if known.

iii. If gift/present is cash to someone outside the household write cash beside entry and note 'to someone outside household'.

c. Play schools/Nursery Schools

Fees for playschools/nursery schools, when paid daily or weekly, should be probed to ascertain whether they are in fact for schools, and not for playgroups or nursery groups. The essential point is that a school provides some form of education and is often attached to a state or private infants' school.

If the entry is for a school, check whether this is first payment, and, if not, ask Q84 on household schedule. If it is first payment, write 'first payment' beside entry.

If expenditure is for playgroup, note this fact.

d. Deposits

State what the deposit was for and whether it was towards a cash purchase or a credit acquisition.

e. Instalments on credit agreement, mail order and insurance premiums

If any payments are entered in the record book which do not appear on the household schedule, check whether the household was already paying this item at the date of the household schedule interview. If they were paying, enter details on the household schedule. If they were not paying, note that it is a "new commitment", and do not enter on the household schedule.

f. Credit card account payments

Details of payment should be shown on S835C.

g. Christmas and savings clubs

Note the purpose of the club, eg purchase of toys, groceries, hampers, tools etc.

h. Home maintenance, improvements and installations

Probe whether DIY or contracted; if DIY obtain break-down of material costs.

For installation costs, note whether installed by informant or builder.

i. Expenditure on other premises

Where there is expenditure on a second accommodation, note whether this is a permanent second dwelling, eg holiday home, or accommodation to which all or part of the household will be moving.

j. Payments for sports

Note whether payment was as a spectator or as a participant.

k. Medical/Dental/Optical treatment or prescriptions

Note whether National Health Service or private.

l. Food for animals

Note whether fit or unfit for human consumption.

m. Holiday payments

Note whether holiday is inside or outside the UK.

Special circumstances

D12

a. Shopkeepers, Farmers etc

If they consume goods which they would normally sell commercially, these goods must be entered.

- i. Where the informant actually puts money in till for the goods, the amount should be recorded.
- ii. Where the informant does not put money in the till for the goods then the price he would have sold the goods for should be entered. In the case of farmers this may be an approximation.

The words "OWN SHOP" or "OWN FARM" should be entered (beside the item) in order to indicate that no actual cash was paid out at the time.

"OWN SHOP" includes any undertaking other than farm, eg newsagent, grocers, garage, printers, dry cleaners.

b. Holiday expenditure including deposits

Note if holiday will be spent in the United Kingdom or abroad.

i. Expenditure on holidays in UK

Informants should be asked to take the record books with them on holiday and itemise as usual eg, meals out, petrol, postcards. (See 3.9 for return of documents).

ii. Expenditure during Record Keeping period in preparation for holiday abroad (including the Channel Islands, Isle of Man and Eire).

I. If an informant pays the deposit or balance owing on a holiday abroad, record the country in which the holiday is to be spent. If more than one country, note name of country in which most time will be spent.

II. Purchase of traveller's cheques/foreign currency: Informants should enter the amount of commission (really a form of bank service charge) paid for the transaction and the country in which the holiday is to be spent.

III. Informants who are going abroad during the record keeping period:

If the informant(s) will be returning home before you finish working in the area follow procedure A. If not, follow procedure B.

A. If informants are returning home before you finish work in the area and you will be collecting record books.

Ask informant to enter in the 'D' book each day:

i. Total amount spent, per day converted to sterling if possible. (Do not itemise purchases).

ii. The country in which the money was spent, eg Holiday expenditure in Spain £30.00.

If informants feel they will have difficulty giving a daily total, one may accept a total amount spent abroad. In such a case, details should be given on page 23 of the 'D' records, showing dates covered by the expenditure, as follows:

"Holiday Expenditure in Spain - January 2-17 inclusive £300.00".

B. If informant will not be returning home in time for you to collect the record book (SEE ALSO 3.9(c)).

Record on page 23 an estimate of what they expect their expenditure abroad to be.

Ask informant to enter the following details in the 'D' book:

- i. Amount of traveller's cheques, foreign currency and £ sterling they are taking on holiday, plus an estimate of any cheques they may write abroad.
- ii. Amount of commission paid on traveller's cheques/foreign currency.
- iii. Country in which holiday is to be spent. (If more than one, note number of days spent in each country).
- iv. Dates holiday will begin and will finish.

Monthly accounts

D13

Where an informant has an informal arrangement with a shop, action (as described under D.3(g) for grocery accounts) should be taken.

Page 20 - refunds and betting

D14

Please ensure that this page is completed. If there are no refunds or winnings, a line should be drawn through boxes to indicate this fact. Before doing this, Qs. 26-29, 35, 41 and 42 on 'B' schedule should be checked to see if refunds would have been expected on expenditure in Record Books.

a. Refunds

If there is no entry in this box, probe to check whether any items of expenditure shown in record books are refundable. This is especially important if there are items mentioned at 26-29, 32, 41 and 42 on the income schedule. If no items are refundable, draw a line through the box.

b. Betting winnings

If there is no entry in the box, query with informant, and if there are no winnings draw a line through the box.

Apart from the normal checking of schedules for omissions, clarity and consistency, Field Branch have devised an additional checking system which is in two parts and contained in Checking Schedule K.

- a. Part 1 (pages 1-5). Checks on these pages must be carried out on all schedules in all quotas.
- b. Part 2 (pages 6-8). Checks on these pages must be carried out on all schedules on the first four FES quotas worked on.

INITIAL INTERVIEW: REGULAR COMMITMENT QUESTIONS

The questions on page 2 should be asked while introducing the record books. The questions cover postal orders as well as regular payments (made by spenders) that have not been covered by questions in the household schedule.

Provision is made for these items to be ticked when they are seen in record books at later calls. If items are not seen in record books at the later calls their absence should be probed. Regular payments would be expected to appear in record books at the frequency stated at initial interview.

The page contains a reminder of the detail required for certain combined payments that need itemising.

If an informant has a credit card explain S835C.

FIRST CHECK AT HOME: 'A' AND 'B' SCHEDULE ITEMS

Page 3 of the checking schedule relates to regular weekly, two weekly, or monthly paid commitments, including slot meter payments, referred to in the household schedule.

These commitments, together with their frequency and the person making the payment, should be noted as part of the first check at home.

Page 4 of the checking schedule relates to income details recorded in the income schedule for employees.

Details of pay, excluding gross pay, should be entered and added up to a gross pay figure. This gross figure should then be checked against the gross figure given by the informant. If the two gross pay figures do not agree, probe for reason at recall and note results of probing.

FIRST CHECKING CALL AND FINAL CALL: DIARY ENTRIES

At the first checking call and final call, check diary entries for points raised on pages 75-83 of these instructions and those on page 1 of Checking Schedule K.

FIRST CHECKING CALL AND FINAL CALL: REGULAR COMMITMENTS

At the first checking call and final call, check for regular commitments recorded on pages 2 and 3.

Check record book for frequency and, in the case of household schedule items check that amounts agree. If they differ explain why on the checking schedule (835K).

These checks are important because diary records should be a record of all payments made in the two weeks, and not just a record of payments not previously mentioned.

FINAL CALL ROUTINE: OTHER THAN REGULAR COMMITMENTS

The routine shown at the top of page 5 of checking schedule should be followed.

- i. This includes asking informants to confirm their name and correct postal address so that there can be no mistake about the despatch of the £5 payment.
- ii. Mention to informants that the postal order will take three to five weeks to arrive. If the informant(s) are moving during this period obtain details of new address.
- iii. Warn informants that we may need to contact them if there are any queries.
- iv. Boxes are provided so that the interviewer can show that these points have been checked.

NOTE THAT ALL NOTES AND AMENDMENTS ARISING FROM USING THESE CHECKS SHOULD APPEAR ON THE INTERVIEW DOCUMENT, NOT ON THE CHECKING SHEET.

FINAL CHECKS AT HOME: DOCUMENTATION

Carry out the three checks regarding record books, credit card sheets and meals out shown at foot of page 5.

Arrange documents in correct order before returning this to the office.

GENERAL CHECKS

Beyond using the checking schedule and looking to see that all questions have been answered, the following further general checks should be made:-

Household Schedule	Did any peculiar or unusual circumstances exist? If so, add notes regarding them at Q99 on the schedule.
Income Schedule	Has information on income and occupation been provided for every member of the household who is 16 years or over? <u>THIS IS IMPERATIVE</u>

This survey is perhaps unique. The whole gamut of possible methods of income and expenditure is vaster than can be covered in a set of instructions. This being so, these written instructions (and notes on the schedules) are designed to help you deal with the majority of domestic financial arrangements, and to help you recognise the few that are more complex.

For the few which are more complex, all that is required is that you make really full notes based on what the informant tells you, and leave the sums or decisions to be worked out by office staff.

Checks on first four quotas - additional checks

7.2

Pages 6-8 of the checking schedule give a series of checks that must be carried out on all schedules in the first four quotas worked on.

These checks indicate some, but not all, of the problem areas on schedules.

Sections 8.2 to 8.6 cover details of returning work to the office.

Form H - weekly return of households

8.2

FES is booked in on a microcomputer direct from the Weekly Progress Returns. The following points are important as it is necessary for us to monitor response and work progress by placing week so that immediate remedial action can be taken if necessary.

1. RETURN A WEEKLY PROGRESS RETURN (form 835H) EVERY PLACING WEEK including the 5th week if you are given an extension. A NIL return must be made if it has been agreed that your placing pattern can be varied. A note explaining why no placings have been done should accompany the NIL return.

The 'H' form should be returned as soon as each weeks placings are complete or at LATEST the day following the end of placing week.

2. Each household dealt with is to be entered in a separate column.
3. Only households dealt with in the placing week should be entered.
4. Non-contacts (code 5) can only apply to the last week of the placing period.
5. The outcome code recorded on the 'H' form should correspond to that on the Calls and Outcome sheet. If the wrong code is entered in the microcomputer it cannot be changed.
6. Remember to enter Authorisation Number and Area Number.
7. Check serial numbers carefully. If the wrong one is given it cannot be changed once entered in the computer.

Form E - record of spenders in cooperating households only

8.3

'E' forms are supplied in the form of carbonised pads each of which includes:

- i. a letter to informants thanking them for their cooperation, followed by
- ii. one pink and one yellow E-form.

There are two different pads containing two different letters, one for single-spender households and one for households with more than one spender. (You will notice that the E-forms are different also, in as much as the one which goes with the single-spender letter has space for the name of only one spender). Please ensure you use the letter appropriate to the size of the household.

1. From the appropriate pad, detach a letter followed by 2 E-forms. To each cooperating household we will be sending the appropriate number of postal orders along with the letter, which will be addressed to the Head of Household. Therefore, you should enter on the letter the name of the HOH and his/her FULL POSTAL ADDRESS. An incomplete address could mean that the postal orders fail to reach their destination. Please use postcodes if informants know them.

Also, enter the serial number in the box marked "our ref".

Because the letter is going out to the public and because the details need to show up clearly on the E-forms, you must write clearly in black or blue ballpoint.

Example:



St. Catherine's House 10 Kingsway London WC2B 6JP
Telephone 01 242 0262 ext

Mr O.P. Kew,
26, LETTUCE CRESCENT,
BINEGAR,
SOMERSET, BS15 3OT.

our ref.

188	10	—
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Date as postmark

Also enter, lower down the page, the number of postal orders enclosed, eg "3", if you are using the multi-spender letter.

2. Turn to the yellow E-form. The HOH name, address and the household serial number should be a carbon copy of that on the letter.

Using a blue or black biro complete the following at top of page:

- a. Area name.
- b. No. of households selected at address.
- c. No. of 'E' forms from address
- d. Starting date of records.
- e. Your signature.
- f. Your authorization number.

Please note the following points.

- A. No of households selected at address. In this space enter the number of households selected for interview (maximum, therefore, of 3 per address), even if they are not all cooperating households.
- B. No. of 'E' forms from household

You may feel, in some exceptional cases, that sending all postal orders to the HOH is unwise if, for instance, there is reason to think he or she

will not distribute them to the other spenders. In this case you would write as many letters to the household as you thought necessary to ensure each spender received his/her payment. In most cases, however, you will write one letter. Hence the "number of E-forms per household" in most cases will be "one". But if there is to be more than one, your entry here (2, 3 or whatever) will alert us to the number of letters to be sent.

C. Starting date of records

Enter here the starting date of the records. These dates should agree with those shown on household schedule.

HOH	Area	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Area</td> <td style="width: 33%;">Ser</td> <td style="width: 33%;">Mid</td> </tr> <tr> <td colspan="3" style="text-align: center;">Ref No</td> </tr> </table>			Area	Ser	Mid	Ref No		
Area	Ser				Mid					
Ref No										
Postal Address	Ref No									
Postal Code	No of households selected at address	No of E forms from household								
Starting date of records										
Interviewer's signature	Auth No									

3. Finally, complete the list of spenders and pin the letter and attached E-forms to the front of the household schedule, after checking that carbon copies are legible.

NOTES OF ANY KIND ARE NOT TO BE WRITTEN ON THE E FORMS. The correct place for notes is page 37 of Schedule A or on a separate piece of paper pinned to the household schedule.

At each cooperating address you must ask for the surname(s), initials and postal address, as these may not necessarily be the same as given on the address list. Failure to complete the E form correctly, and to check all the details and despatch it at once to HQ, will delay payment to cooperating members. This must be avoided at all costs. Remember that, if there is any doubt about the completeness of the data, you should ensure that informants are aware that the final decision about payment must be made at HQ.

In some cases informants will not wish to give their names or they may be willing to give their names but do not wish to be paid the £5 postal order(s).

Where names are withheld then you should deliver the postal order(s) personally, However please let Head Office know before you leave the area, so that postal orders can be expedited. This type of case should not arise very often.

Where informants do not wish to be paid, you should suggest that they may wish to give the postal orders to charity.

To be returned in every envelope containing cooperating or non-cooperating serial numbers, which should be coded appropriately. "RECORDED DELIVERY" must be used for all cooperating households and for all other cases where the names and addresses of informants are included in a despatch.

Budgets for all cooperating households must be returned in ENVOPAKS and sent RECORDED DELIVERY to Room 423. Please keep the receipt and note on it the serial numbers included in that envelope (in case of any query from Field Branch).

Order of documents

8.5

Detailed over are the documents required, in order, for the different types of response.

a. Fully cooperating household

1. Calls and outcome sheet
2. E forms - 3 copies, pinned to A schedule
3. A schedule
4. Checking schedule
5. B Schedule(s), credit card account payment sheets (S834C) (where applicable), D schedules (including continuation sheets where applicable) in person-number order - the B schedules should be in person-number sequence, (where there are S834C sheets, these should be placed in front of the B schedule), the relevant D schedules following each B schedule; the D schedules should be in person-number order.

eg. Three - spender household, persons 1, 2 and 3

- i. Credit card sheets, persons 1 and 2.
- ii. B schedule for persons 1 and 2.
- iii. D schedule, week 1 person 1.
- iv. D schedule, week 2 person 1.
- v. D schedule, week 1 person 2.
- vi. D schedule, week 2 person 2.
- vii. Credit card sheets person 3.
- viii. B schedule for person 3.
- ix. D schedule, week 1 person 3.
- x. D schedule, week 2 person 3.

b. Refusal, non-contacts - ineligible

1. Calls and outcome sheet.

(Partial refusals - as refusals, and all other documents completed wholly or partially for or by the household).

- c. There must be no delay in return of work to HQ. Budgets for fully cooperating households should be returned no later than 2 working days after final call. If you need to recall to check any item, and cannot do so within this time, please contact HQ for instructions.

DELAY IN RETURNING COMPLETED BUDGETS CAUSES DELAY IN PAYMENT TO INFORMANTS.

Study time

8.6

For attending first FES briefing

6 hours

While some interviewers work fairly regularly on the Survey, there will inevitably be occasions when interviewers have breaks of time between working on quotas and therefore need to re-study the instructions before starting work.

Except in the cases where an interviewer has been re-briefed during a break between quotas, study time will be paid as follows:-

- a. To interviewers who have had a break of from 3 to 5 field-work cycles (sample months) between FES quotas:- 1 HOUR'S STUDY TIME.
- b. To interviewers who have had a break of 6 or more field-work cycles (sample months) between working on FES quotas:- 2 HOUR'S STUDY TIME.
- c. To interviewers not eligible at 1 or 2 for study of amended documents and instructions at the beginning of each year:- 2 HOUR'S STUDY TIME.

Clerical time

8.7

For checking each fully cooperating household - 1 1/2 hours.

For checking schedules for a household that promised cooperation, but later failed to cooperate - 45 minutes.

For checking a household that promised co-operation but had to be reallocated to another interviewer for final calls - 1 hour.

For checking reallocated households where initial interview was done by another interviewer - 1hour.

(ie both placing interviewer and pickup interviewer can claim one hour).

You should claim these on normal claims form.

The foregoing instructions provide guidance on how to deal with the major and most common situations to be met in the field. The staff in Field Branch are always available for advice on any cases not covered by the instructions. It is permissible to telephone for advice if the matter is urgent. Otherwise, a letter addressed to the appropriate person will be answered by return post.

HEADQUARTERS

Contact as follows:-

Allocation Officer - for any matters related to availability or non-availability and acceptance of quota and briefing dates. Ext 2306/2158.

Field Officer for the survey-for advice on matters of definition or procedure for this survey, together with queries on general interviewing method. Also for issues related to work in progress, its return to HQ and requests for stationery.

Refusals. If you get 2 refusals in one week, or other problems with response please ring in to talk the matter over with the Field Officer.

Miss June Langham Ext 2267

FES Office Ext 2275

FIELD

Training Officers are out in the field, continuously observing and supervising work in progress. Each interviewer is trained to handle the Family Expenditure Survey in the first instance, by being accompanied on some placing, checking and collection calls. Thereafter, field supervision occurs periodically and at very little notice. It can also be given if asked for by an interviewer at any other time.

Payment of benefits

We have been advised by the Department of Health and Social Security and the Department of Employment that benefits are normally paid in the following ways.

Attendance allowance	Payment book
Child benefit	"
Family income supplement	"
Housewives non-contributory invalidity pension	"
Industrial injury disablement pension	"
Industrial injury death benefit	"
Invalidity pension and invalidity allowance if paid	"
Invalid care allowance	"
Job release allowance	Giro
Maternity allowance	Payment book
Maternity grant	Giro
Mobility allowance	Payment book
Non-contributory invalidity pension	"
Retirement pension including old persons pension	"
Severe Disablement Allowance	"
Sickness Benefit	Giro
Supplementary allowance	Payment book
Supplementary pension	Payment book
Training allowance (eg TOPS, YTS)	"
Unemployment benefit	Giro
Widows allowance	Payment book
Widowed mothers allowance	"
Widows pension	"
Workmans compensation benefit	"

Points to note are:

1. General. All benefits may be paid on the odd occasion by giro, eg when starting benefit. Usually however a payment stated to be by book will be by this method.
2. Training allowances. Because of the diverse nature of these schemes, payment arrangements are made by local offices and can be giro or payment book.

GLOSSARY

- ACCIDENT INSURANCE -** This is a private insurance taken out by individuals to give them a lump sum payment or a weekly payment if they suffer from an accident.
- ADDITIONAL PENSION -** See Earnings related supplement.
- ANNUITY -** This is basically a form of providing a regular income. A lump sum of money is paid to an insurance company and, in return, the company pays out a regular income. There are three main types of annuity; level annuities, where the income remains the same each year; increasing annuities, where the income increases at an agreed rate and unit-linked annuities, where the income is linked to the value of a fund (eg property).
- ATTENDANCE ALLOWANCE -** This is a benefit for adults or children who are severely disabled mentally or physically and need attention. In order to qualify, the person has to satisfy certain residential and medical conditions. There are two rates of allowance: the higher rate for those who need attention day and night, and the lower rate for those who need attention only by day or night. The allowance is normally paid by order book and is usually in addition to other National Insurance (N.I.) benefits.
- BANK BUDGET ACCOUNT -** A budget account is a way of spreading the cost of household bills and other lump sum payments over the year. The bank normally has to agree to the precise estimate of the year's cost of all the bills to be included in the scheme. This total is divided by 12 and a standing order for this amount is made to the bank each month. The bills are usually paid with a special cheque book from the budget account. Interest charged on this type of account varies between banks.
- BANK CHARGES -** Bank charges are amounts paid to a bank (by deduction by the bank from the account) to cover the administration of its services, eg for processing cheques, stopping cheques, paying standing orders.
- BANK CURRENT ACCOUNT -** An account into which money is deposited, usually to meet the needs of everyday expenditure. A cheque book is supplied to write cheques for cash or goods. In many cases (although not in all), an individual does not receive interest on this type of account. Bank charges may be levied to cover the administration of the account. This is the type of account into which salary is paid and from which standing orders are paid.
- BANK DEPOSIT ACCOUNT -** An account into which people can deposit any amount of money and on which they can get interest. Money can be drawn out of such an account at reasonably short notice.

- BANK DIRECT DEBIT -** See direct debit.
- BANKERS CARD -** See cheque guarantee card.
- BANK LOAN -** A personal loan arranged directly through a bank. It may cover a number of articles or services or only part of an article or service, depending on the borrower's circumstances and government credit restrictions.
- BANK SAVINGS ACCOUNT -** This is similar to a bank deposit account but there is often a requirement for a minimum investment and there are restrictions on when the money can be drawn out. Consequently, the interest rate is higher than for deposit accounts. Some types of bank savings account are known as Capital Investment Accounts.
- BANK STANDING ORDER -** See standing order.
- BLIND PERSONS ALLOWANCE-** This is an additional benefit paid with supplementary benefit to registered blind people. It is received in addition to other concessions.
- BOARD BUDGETING SCHEME -** This type of scheme is operated by the Gas and Electricity Boards and by the Post Office. It works in much the same way as a bank budget account, by spreading the cost of the bills over the year with regular monthly payments. There is no interest or service charge payable with this scheme.
- BRITISH SAVINGS BONDS -** These are government issued bonds.
- BUDGET/OPTION ACCOUNT -** A budget or option account is usually with a department or chain store. There are two main types. In one type the customer undertakes to make certain payments into an account, usually at a regular rate and time interval. In return, they are able to purchase goods on credit up to a certain figure specified in the original agreement. In the second type, goods can be bought on credit, but the monthly statement received from the store can be paid in full or by agreed instalments. If paid in full, no interest will be charged.
- AT A SHOP OR STORE**
- BUILDING SOCIETY -** Building Societies are organisations into which money can be invested, through opening various types of accounts with varying rates of interest. The individual normally receives a pass book in which deposits and withdrawals are recorded. Interest on the account is normally paid every six months. Building Societies are the prime source of loans for the purchase of domestic property.
- CASH DISPENSER CARD -** A card issued by banks which operate cash dispensing machines at convenient locations which can be used both inside and outside normal banking hours. The card operates the machine.
- CHECK TRADER -** Here, the purchaser pays for goods by check. Usually a check trader calls on the purchaser to sell him a check, which he can then use to buy goods in a number of shops. Some retailers issue checks also known as bonds. The largest check trading organisation in the country is the Provident. Check trading today is most prevalent in the North of England - Humberside, West Riding, Teeside, etc for textiles and household goods.

- CHEQUE GUARANTEE CARD -** When paying by cheque some shops, stores, etc want a guarantee that the cheque will be honoured, before they accept it. The cheque card is the 'payer's proof' that the bank holds him credit worthy. (In most cases banks guarantee that they will honour the cheque up to £50). A cheque card is not a credit card. Barclays Bank does not issue guarantee cards, as such, to its customers. Instead, they are issued with Barclaycards, which serve the triple purpose of a credit card, cheque guarantee card and a cash dispenser card.
- CHILD BENEFIT -** Child Benefit is paid for all children under 16 (or over 16 if still at school). It is not means tested and can be received regardless of income level. It is paid weekly or every 4 weeks by payment book.
- CHRISTMAS BONUS -** A tax free bonus paid, with certain long term benefits, shortly before Christmas each year.
- CLUB -** See Co-op Club, shop running a club.
- COMMUNITY PROGRAMME - (CP)** The Community Programme is a scheme run by the Manpower Services Commission to encourage sponsors (eg Local Authorities, private firms, trade unions, charities) to set up projects to improve the local community (eg environmental improvement, provision of social amenities, social and cultural work). Recruitment of the labour force for the projects is through Jobcentres and is normally limited to people aged 18-24 who have been unemployed for six months or more, and those aged 25 and over who have been unemployed for over 12 months. The Manpower Services Commission reimburses sponsors for approved wages (generally the local rate for the job) and their NI contributions. The duration of a project is usually between 3 and 12 months. Sponsors are also encouraged to provide training.
- CONTRIBUTORY INVALIDITY-PENSION** Persons who qualify for Sickness Benefit (See Sickness Benefit) and are off work for more than 28 weeks are entitled to an Invalidity Pension provided they satisfy NI contribution conditions. Contributory Invalidity Pension is paid by giro or payment book.
- CO-OP CLUB -** In this club goods are obtained from the Co-op and a regular amount is paid into the club usually through a collector.
- CO-OP SOCIETY -** By being a member of a Co-op society and buying goods from the Co-op, a person earns a dividend. The more goods that are bought, the greater the dividend. Profits made by the Society are paid back to members on a proportional basis, depending on the amount of dividend earned. This type of society is different from a Co-op bank.
- COVENANT -** Under a deed of covenant, a person can agree to make a series of payments to an organisation or individual. The recipients of the payments can claim back from Inland Revenue any tax paid by the payer on their income, covering the amount paid.

CREDIT CARDS -

Eg, Barclaycard, Access, American Express, Diners Club. Any one over 18 can apply for a credit card. A person issued with a card can purchase goods and services, on credit, from a variety of shops and organisations which accept the card. Any number of goods and services can be purchased, up to the individual's credit limit set by the credit card company. Each month a detailed statement is sent to the cardholder showing the cost of the goods and where they were purchased. If the whole of the account is paid off within a specified period, no interest is charged. The cardholder must always pay off a minimum proportion of the amount owing, usually £5 or 5%, whichever is the greater. Interest is charged on the remaining amount.

The exceptions to this system are Diners Club and American Express, who do not have a credit limit. With American Express, the account must always be paid in full at the end of the account period.

CREDIT SALE -

Credit Sale agreements are usually taken out for the purchase of smaller consumer durables (eg radios, cameras, tape recorders). The agreement normally covers nine months and the borrowed money is repaid to the shop, with the first payment serving as a deposit. Goods purchased by Credit Sale are the property of the purchaser as soon as they are acquired. Sometimes, no interest is charged on this type of agreement.

CREDIT TRADER -

These are commonly known as 'tallymen', 'bagmen' or, in Scotland, 'Scotch drapers'. Credit traders call on customers, show samples, and, if items are purchased, then recall at regular intervals to collect money. They trade usually in drapery and clothing for women and children, but some deal in furniture, carpets and men's clothing.

CREDIT TRANSFER -

A credit transfer is a means whereby an amount of money is transferred from one account to another on instruction and without writing a cheque. A transfer can take place between two different people or organisations, or between different accounts of one person, eg current to deposit account. Where a person transfers money from one account to the other, both of which are their own, this is not considered to be expenditure.

CURRENT ACCOUNT -

See Bank Current Account.

DEATH GRANT -

Death grant is payable on the death of a person who has satisfied certain NI conditions. The amount of grant depends on the age of the person who died. It is claimed through the DHSS office and payment is by giro cheque.

DEBENTURE -

A debenture is a loan to a company, usually repayable over a fixed period of time with regular payments of interest. The interest, however, is likely to vary according to the terms of the debenture.

DEPOSIT ACCOUNT -

See Bank Deposit Account.

DIRECT DEBIT -

A bank direct debit is a form of standing order where the amount of each payment is likely to vary. The variation is instigated by the person being paid and therefore saves the payer having to take action.

EARNINGS-RELATED - SUPPLEMENT This is a supplement to some state benefits. It is earnings related, in the sense that the amount paid varies according to the NI contributions made (while working) and the earnings as an employee in the relevant tax year ie the higher the wage, the higher the contribution, the higher the supplement. The supplement is normally paid by giro with the relevant standard benefit (eg Retirement Pension, Invalidity Pension).

EMPLOYEE - An employee is someone who receives a wage or salary for working for an employer (this can be an individual or an organisation, consequently directors and managers are employees of their companies).

EMPLOYERS SICK PAY - When an employee is off work sick they receive Statutory Sick Pay, NI Sickness Benefit or Invalidity Pension. In addition, they may receive Sick Pay from their employer. Sickness pay from the employer is normally;

- i. Made up pay, eg the difference between NI Sickness Benefit etc, and normal earned pay or
- ii. half pay, ie half normal earned pay.

There are, of course, other arrangements depending on the individual employer or employee's situation.

EMPLOYMENT STATUS - See employee, self employed.

ENTERPRISE ALLOWANCE - This is a payment made to unemployed applicants who set up business in a self-employed category.

EEC TRAINING ALLOWANCE - This is an allowance paid by the European Economic Community out of its social fund to redundant workers in specified industries, eg steel workers, while they are undergoing re-training.

FAMILY INCOME - SUPPLEMENT This supplement is available to families including one parent families with at least one child under the age of 16 (or over 16 if still at school) where the head of family is in full time work, but the total family income is below a certain level. The amount of the supplement depends on the number of children in the family and the total family income. It is paid by payment book. FIS can continue to be received for a year even if the total family income rises during this period.

FINANCE HOUSE LOAN - This works in much the same way as a personal loan from a bank (see bank loan), but in this case the loan is arranged directly with the finance company. Such loans normally have a higher rate of interest than a bank loan. Some HP agreements may also be arranged directly with a finance house.

FRIENDLY SOCIETY - BENEFITS Friendly societies provide a wide range of benefits for members in need. The most common of these is a sickness benefit provided for a member or one of the member's family. Some friendly societies provide a scheme whereby a pension is paid on retirement. (NB This is not an employer pension).

GIRO See Post Office Giro.

GRANNY BONDS - See index linked national savings certificates.

GUARDIANS ALLOWANCE - A weekly state payment for someone who takes an orphan into the family. In exceptional circumstances this may be paid if one of the child's parents is still alive but cannot care for the child. It is paid by payment book.

HIRE PURCHASE - This is one of the most common means of purchasing goods by instalment. The goods are hired before they are purchased therefore, unlike many other types of loan, the goods are not actually owned until all the instalments are paid plus a nominal purchase fee. This type of loan is normally arranged by the shop where the goods are acquired, and the instalments are paid to the shop.

HIGH STREET BANKS - These are the normal banks such as National Westminster, Barclays, Midlands, Lloyds. Their two main accounts are 'Current' and 'Deposit'.

HOSPITAL SAVINGS SCHEME- These are run on a commercial basis to provide financial aid in the form of contributions towards medical appliances or weekly payments when sick. Eg Hospital Savings Association (HSA), Hospital Saturday Fund (HSF).

HOUSEWIVES NON-CONTRIBUTORY INVALIDITY PENSION - A married woman aged 35-49, who is continuously incapable of paid work and incapable of performing normal household duties for at least 28 weeks is entitled to Non Contributory Invalidity Pension. (See Non Contributory Invalidity Pension).

HOUSING BENEFIT - This is a collective name used for the various forms of assistance given with housing costs. (Also called UNIFIED HOUSING BENEFIT).

The assistance is given in the form of

- i. Rent Rebate or Allowance (See page 101)
- ii. Rate Rebate (See page 100)
- iii. Housing Benefit Supplement (See below)

To obtain these benefits the individual can apply to the local DHSS office OR local authority office.

HOUSING BENEFIT - SUPPLEMENT The benefit will give assistance to rent/rate payers receiving rent/rate rebate/allowance. The supplement is in the form of an increased rebate/allowance.

- INDEX LINKED NATIONAL SAVINGS CERTIFICATE** - The first index linked issue, known as "Granny Bonds", allowed people of retirement age or over (65 men, 60 women) a form of 'inflation proofed' saving by index linking to the Retail Price Index. Index linking is assumed as long as the money is not withdrawn for 12 months. If the money is kept in for five years there is an additional 4% bonus. The age bar was lowered and with the second issue, the certificates became available to anyone.
- INDUSTRIAL DISABLEMENT BENEFIT** - This can be a weekly pension or lump sum gratuity, depending on the degree of disablement arising from the industrial accident or disease. This benefit is normally paid when entitlement to Industrial Injury Benefit stops. However, as this benefit or pension may be received even if the person does not give up work it can be paid from three days after the accident or development of the disease. As a pension the benefit is paid by payment book.
- INDUSTRIAL INJURY - DISABLEMENT PENSION** - See Industrial Disablement Benefit.
- INDUSTRIAL WIDOWS' PENSION** - An Industrial Widows' Pension can be claimed by a woman whose husband died as a result of an industrial accident or prescribed industrial disease.
- INVALID CARE ALLOWANCE** - Invalid Care Allowance is a benefit for people of working age who cannot work because they have to stay at home to care for a severely disabled relative. There are no NI contribution conditions but, in general, married women and people receiving certain other benefits do not qualify for this allowance. The allowance is claimed through the local DHSS office.
- INVALIDITY ALLOWANCE** - Invalidity Allowance is paid in addition to Invalidity Pension if the person becomes incapable of work while they still have a reasonable part of their working lives before them (ie up to age 60 men, 55 women). After retirement age (65 men, 60 women) people who have been receiving the allowance have it included in their retirement pension. Payment is weekly by giro or payment book.
- INVALIDITY BENEFIT** - See Invalidity Pension, Invalidity Allowance.
- INVALIDITY PENSION** - Invalidity Pension is paid in place of Sickness Benefit if a person continues to be incapable of work after 28 weeks (see Contributory Invalidity Pension, Non-Contributory Pension and Housewives Non-Contributory Invalidity Pension).
- JOB RELEASE ALLOWANCE** - Men aged 62 (60 if disabled) or over and women aged 59 or over, who are full time employees and who are prepared to leave work before retirement age, can claim this non-contributory weekly benefit, provided that their employer agrees to replace them with someone who is registered as unemployed. The job release scheme is planned to end on 31 March 1984.

- LOAN -** See Bank loan, Finance House loan.
- LOCAL AUTHORITY -
SECURITIES** Investing in local authority securities is a way of lending money to the LA at a fixed rate of interest, over a fixed period. The securities are renewable although the interest rate may not be the same.
- MAIL ORDER AGENT -** Mail order agents are often local part time agents who work on behalf of the mail order catalogue companies (eg Universal, Littlewoods). Mail order companies offer a wide range of goods, nearly all available on credit. Someone can choose what they want from the catalogue, and the agent completes an order form and sends it off to the company, the goods being received by post. Payment is usually in equal instalments over 20 or 38 weeks, longer for high amounts. With many companies, the credit price is competitive with cash shop prices.
- MAIL ORDER DIRECT -** This refers to mail order services advertised by a company in a newspaper, magazine, eg Reader's Digest, Automobile Association or in a limited item catalogue. Anyone interested in the advertised goods contacts the company direct and receives the goods through the post. Regular instalments are then paid direct to the company. This is different to arrangements through a mail order agent.
- MATERNITY ALLOWANCE -** Maternity allowance is a weekly benefit, paid by giro, usually for 18 weeks, starting 11 weeks before the baby is expected. This allowance is paid in addition to Maternity Grant if the mother was working and paying full NI contributions at some time during the fifteen months before the baby was born. The husband's contributions do not count.
- MATERNITY GRANT -** This is a lump sum paid for each birth to help with the general expense of having a baby. It is payable in nearly all cases of confinement where either the mother's or the husband's NI contributions allow entitlement. It is paid by giro cheque to the mother. Generally to qualify for Maternity Grant, a mother to be will have to be present in Britain for at least 26 weeks out of 52 before confinement.
- MATERNITY PAY -** Under the Employment Protection Act a woman having a baby who normally works for her employer eight hours a week or more, and has worked continuously for at least the previous two years, is entitled to this pay from her employer, as long as she continues working up to the 11th week before the baby is due. Payment is in cash (paid weekly) for the first six weeks after the woman stopped work. Maternity pay is less than normal pay.
- MOBILITY ALLOWANCE -** Mobility Allowance is a benefit to help certain disabled people to meet their additional transport costs. It is paid by payment book every four weeks. Mobility Allowance should not be confused with MOTORBILITY which is an independent voluntary organisation for the purchase or hiring of vehicles at preferential rates.

MORTGAGE -

A mortgage is a loan for the purchase of property. The loan can be taken out from various organisations eg building society, local authority, bank. The size of the loan is usually worked out on multiples of yearly salary (often 2-2¹/₂ times depending on the lender's policy). The borrower, in most cases, will have to provide a deposit for the property (say 10%). Mortgage arrangements vary in the amount of interest payable and the tax relief that can be claimed. Most mortgages are one of two types, either interest and principal or interest only where there is an endowment policy covering the principal. (See Option mortgage, 'Top Up' mortgage).

**MORTGAGE TAX -
ALLOWANCE
(M.I.R.A.S)**

In April 1983 a new scheme was introduced whereby tax relief on interest can be given by the organisation granting the mortgage rather than Inland Revenue via PAYE tax coding, etc. The scheme is not universal and not all institutions have adopted it. Under the new scheme the amount of interest paid to the building society, etc, is reduced by the amount of tax relief due.

**NATIONAL INSURANCE -
CONTRIBUTIONS**

A NI contribution is a regular contribution by individuals to enable them to obtain various national insurance benefits. All employed and self employed persons (earning more than a specified minimum amount) are required to pay a NI contribution. Some non-employed persons may also do so. There are different classes of contribution depending upon employment status.

Employees pay class 1 contributions which are deducted from their wage or salary. There are three levels, contracted into the state pension scheme, contracted out of the state pension scheme (if the employee is in a private pension scheme) and a reduced rate paid by married women who were paying into the scheme before April 1978. (The reduced rate entitles them to fewer benefits).

Self employed pay class 2 contributions on a regular basis and class 4 on an annual basis depending upon profits.

Non-employed persons may also pay voluntary contributions under class 3.

**NATIONAL SAVINGS
BONDS**

There are two types- Income Bonds and Deposit Bonds. Income Bonds pay out a monthly income based on interest while Deposit Bonds accrue the interest until required.

NATIONAL SAVINGS BANK -

This was formerly the Post Office Savings Bank. There are two types of account; ordinary accounts and investment accounts. The investment account offers a higher rate of interest and longer withdrawal terms than the ordinary account. There are no cheque books for these accounts, for both types of account customers have a book in which all deposits and withdrawals are recorded. It is possible to transfer money from a National Savings Bank account to a National Post Office Giro account.

NATIONAL SAVINGS CERTIFICATES - There are two types Index-linked which are described under that title and ordinary. Ordinary certificates have an issue number eg '28 issue'. They are normally for a period of 5 years.

NI RETIREMENT PENSION - This is the basic state pension for retired people (ie men aged 65 and over, women aged 60 and over). The rate of this pension depends upon the record of NI contributions during working life. It is paid weekly by payment book.

NI SICKNESS BENEFIT - This benefit is paid to people who are incapable of work due to sickness and have satisfied certain NI contributio conditions. Sickness benefit is paid for 20 weeks while the person is incapable of work. The benefit is claimed by filling in the NI Medical Certificate and sending it to the DHSS Office. Payment is by giro cheque, weekly. (SEE STATUTORY SICK PAY)

NON CONTRIBUTORY - INVALIDITY PENSION Anyone, aged 35-49, of working age who has been off work for 28 weeks but does not qualify for a full Invalidity Benefit because of a poor NI contribution record can claim this pension. Non Contributory Invalidity Pension is paid by giro or payment book.

OLD PERSONS PENSION/ - OVER 80's PENSION The basic NI retirement pension is conditional on the record of NI contributions. Old Persons Pension is paid regardless of the NI contributions record.

ONE PARENT BENEFIT - In 1981, Child Benefit Increase was renamed One Parent Benefit. This benefit is paid to single parents, whatever the reason for them being single parents (ie widowed, divorced, legally separated or single). As this is an increase in Child Benefit for single parents, the person must have been entitled to Child Benefit in the first place for at least one child who lives with them. It is paid weekly or every four weeks by payment book.

OPTION ACCOUNT - See budget account at a shop or store.

PENSION FROM PREVIOUS - EMPLOYER A pension from previous employer is based on contributions made by the employee to the employer's pension fund or upon contributions made by the employer on the employee's behalf.

POST OFFICE GIRO - This is also known as National Giro. When making a payment by Giro, the Giro account holder either fills in a transfer form and transfers money from his account to another Giro account, or he makes use of a standing order to another Giro account. Apart from these two methods it is also possible to make payments to a non-Giro account holder on a Giro cheque. Giro cheques can be cashed by non-Giro account holders at a post office or paid into bank accounts.

There is also a Post Office Giro deposit account.

- PRIVATE SICKNESS - SCHEMES** - Private sickness schemes can be run on a commercial basis or on a private basis by workers in an undertaking. Eg, Hospital Savings Association, Insurance Companies.
- RATES -** Rates are a tax on all kinds of property (commercial and private) levied by and paid to the Local Authority. The money from rates goes towards paying for local services of various kinds. The amount paid in rates depends on the rateable value of the property and the amount in the pound which the council decides to levy in a particular year.
- RATES REBATE -** Some people with low incomes who are liable to pay rates may get relief towards paying them by the Local Authority. Owner occupiers or tenants may qualify for this. The amount of rebate depends on the income of the person claiming, the size of their family and the amount they pay in rates. The rebate can take the form of a refund or a reduction of the rates payable. There may be variations on this in individual circumstances. (SEE ALSO HOUSING BENEFIT).
- REDUNDANCY PAYMENTS -** Under the Redundancy Payments Act 1965, an employer is, in most circumstances, legally obliged to pay a minimum lump sum in redundancy money to any employee who is made redundant after working continuously for the employer for at least two years.
- The amount of the payment depends upon the age of the person when he is made redundant, the number of completed years service (over the age of 18) and the weekly earnings at the time of redundancy. Redundancy payments under the Redundancy Payments Act are distinct from severance pay or money in lieu of notice.
- RENT ALLOWANCE -** A benefit administered by the Local Authority for private tenants to help with paying their rent. To qualify, the income of the family has to be below a certain level. The amount of the allowance depends on the size of the family and the amount paid in rent and income received. The allowance takes the form of a cash amount. (SEE ALSO HOUSING BENEFIT).
- RENT REBATE -** A benefit administered by the Local Authority for council tenants to help with paying the rent. To qualify, the income of the family has to be below a certain level. The size of the rebate depends on the number in the family, the amount paid in rent and income received. The rebate takes the form of a reduction in rent. (SEE ALSO HOUSING BENEFIT).
- RETIREMENT PENSION -** See NI Retirement Pension.
- SAVE AS YOU EARN -** Save As You Earn is a National Savings or Building Society scheme whereby a person agrees to make sixty regular monthly contributions (from a £4 minimum to a £50 maximum) over five years.

SECOND MORTGAGE - A second mortgage is a loan usually arranged for a large item of expenditure (eg, home improvements). The distinguishing feature of this type of loan is that it uses the person's home as security, consequently the rate of interest is likely to be less than other types of long term loan.

SELF EMPLOYED - Someone is self employed if they work on their own account instead of drawing a wage or salary from an employer. It includes anyone who is responsible in their work only to themselves (Tax is not deducted at source by PAYE but paid direct to Inland Revenue).

SEVERANCE PAY - This is general term covering payment for loss of office or money in lieu of notice.

SEVERE DISABLEMENT ALLOWANCE Paid to people who cannot work because of long term sickness and who do not qualify for Contributory Invalidity pension because of too few NI contributions. Nov 1984-Nov 1985 paid to those aged 16-34 and 50 to retirement. From November 1985 paid to all who qualify regardless of age. See also Housewives Non-Contributory Invalidity Pension and Non-contributory Invalidity Pension.

SHARES - A share in a company can be bought by an individual thereby making him a part owner of the company. Interest (dividend) is paid from the profits of the company to shareholders.

SHOP RUNNING A CLUB - This type of club is normally run by a small shop mainly for toys, clothing and household goods. In many cases the customer has to make a number of payments to the club before being entitled to make a purchase. Usually the payments are not earmarked for any specific item, but can be used to purchase any goods sold by the shop.

SICKNESS BENEFIT - See Statutory Sick Pay. NI Sickness Benefit.

SICK PAY - See Statutory Sick Pay. NI Sickness Benefit, Employers Sick Pay.

SPECIAL TEMPORARY - EMPLOYMENT PROGRAMME (STEP) This programme provides temporary work for adults who have been out of work for six months, in the case of 19-24 year olds, or twelve months for those who are older. Those taking part are paid the rate for the job subject to a maximum limit. Projects are sponsored by Local Authorities and voluntary organisations and are designed to improve the local area. The programme is run by the Manpower Services Commission. The programme is currently being replaced by the Community Enterprise Programme (CEP).

STANDING ORDERS - This is an arrangement that can be made with a bank to pay regular bills. The bank can automatically pay the bills on prearranged dates and deduct the amount(s) from the person's account.

- STATUTORY SICK PAY -** From April 1983 employers have been responsible for paying the first eight weeks of sickness benefit in any one tax year. After eight weeks, NI sickness benefit is paid directly by DHSS.
- The payment is subject to various conditions including length of service.
- NB. SSP should not be confused with payments under a company sick pay scheme.
- STOCKS -** Usually refers to a block of shares (see shares).
- STRIKE PAY -** An amount paid by a Trades Union to its members who are on official strike. The amount paid varies between unions and depends on the circumstances of the strike.
- SUPPLEMENTARY BENEFIT -** This is the basic Social Security benefit designed to prevent anyone having too little to live on. There are two kinds of Supplementary Benefit, Supplementary Pension for people over retirement age and Supplementary Allowance for people aged 16 to retirement age. The amount of benefit that can be received depends on a means test of needs and resources. Payment is made by giro or payment book. Supplementary Benefit may be paid with other benefits.
- SUPPLEMENTARY RATES -** These are additional rates levied by the local authorities. They are normally levied in the second half of the financial year. They are normally encountered during periods of rising inflation.
- 'TOP UP' MORTGAGE -** In cases where a building society does not grant a full requested mortgage to cover a particular property the balance may be provided by another organisation eg, an insurance company. The payments on this type of mortgage are usually made separately, to the organisation granting the additional mortgages.
- TRADE UNION PENSION -** A proportion of some Trade Union contributions are put into a pension fund, which is paid on retirement. This is not a pension resulting from being an employee of a Trade Union.
- TRADE UNION SICK PAY -** Some Trade Union subscriptions include an element which is put into a sick fund. Members of the union who are sick can claim benefit from this fund, provided they meet the necessary requirements.
- TRAINING OPPORTUNITIES SCHEME (TOPS) -** People over 19 who have been away from full time education for a total of at least two years after age 16 can apply through Jobcentres for a TOPS course to learn a new skill. The lengths of TOPS courses vary according to the skill

being learnt. While on the course people are paid a basic weekly rate. An earnings related supplement may also be paid depending on the person's NI contributions record and earnings in the relevant tax year.

- TRUSTEE SAVINGS BANK -** Until recently the TSB was similar to the National Savings Bank and was closely controlled by the government. It was also organised on a local basis. Today it is organised in much the same way as a normal high street bank, eg Barclays, Midland.
- TRUSTS -** A trust can be set up with an amount of money, to benefit a certain person or a group of persons. A trust has to have an object or clearly defined aim. A trust is managed by trustees for the benefit of those for whom it was set up, ie the beneficiaries of the trust. Trustees are legally required to invest in suitably safe investments. There are two basic types of trusts; fixed trusts, where a particular person or organisation has the right to income from the trust, and discretionary trusts, where it is left to the trustees to decide which of the possible beneficiaries should be paid income.
- TURNOVER -** A company's turnover is the value of total sales (ie total gross takings) during a specified accounting period, normally a year.
- UNEMPLOYMENT BENEFIT -** People out of work are entitled to claim Unemployment Benefit if they have worked for an employer and paid full NI class 1 contributions. Self-employed people and married women who pay reduced NI contributions cannot claim. To maintain receipt of the benefit, the person must register for work at the employment exchange. The maximum length of time benefit can be received is one year. Payment is by giro.
- UNIFIED HOUSING BENEFIT -** See Housing Benefit.
- UNIT TRUSTS -** Unit trusts are trusts that are set up for the purpose of investing money in a wide range of undertakings, to get a good return for the people who have invested (ie bought units) in the trust. These trusts vary in the types of investment made and the method of providing return for investors. Often a proportion of money paid is used as a premium for a life insurance.
- WAR LOAN -** A war loan was a way of investing in government stock primarily for the war effort. Such loans, some of which are still outstanding, were generally at rather low rates of interest.

WAR DISABILITY PENSION - This pension can be paid to individuals injured as a result of a state of war or other designated military action. Additional allowances that may be paid with this are unemployability supplement, constant care allowance, comforts allowance, educational allowance, clothing allowance, exceptionally severe disablement allowance.

WAR WIDOWS PENSION - This pension is paid to widows whose husbands were killed in either of the world wars. It may also be paid to widows of civilians who were killed in the second world war. The pension is not normally affected by other income.

WATER METER - This is a meter measuring the consumption of water. An individual is charged for the amount of water used rather than paying for water through a general water rate.

WIDOWED MOTHERS ALLOWANCE - This is paid to a widow when Widows Allowance ends (ie after 7 months from husband's death), if the widow has a dependent child under the age of 19. It is paid by payment book weekly and is subject to the husband having met NI contribution requirements.

WIDOWS ALLOWANCE - Widows Allowance is paid for the first 26 weeks after the husband's death if the woman was under 60 when the husband died or he was not getting a Retirement Pension when he died. The allowance is conditional on the husband having met NI contribution requirements. It is normally paid by payment book.

WIDOWS BENEFITS - A series of benefits that a widow may be entitled to after her husband's death. See Widows Allowance, Widowed Mothers Allowance, Widows Pension.

WIDOWS EARNINGS - RELATED SUPPLEMENT See Earnings Related Supplement.

WIDOWS PENSION Widows Pension is paid to a widow when Widows Allowance ends, if the woman was 40 or over when the husband died or when Widows Allowance ended, provided that there is not a dependent child under 19. The pension is subject to the husband having met certain NI contribution conditions. It is normally paid by payment book.

YOUNG WORKERS SCHEME - Under this scheme the Manpower Services Commission subsidises an employer for employing a young person who has been registered as unemployed. The amount of subsidy depends upon the wage paid. This is not a state benefit as such.

YOUTH TRAINING SCHEME - This is a new scheme started in September 1983 (known as Youth Training Programme in NI where it started in September 1982).

The scheme replaced the old YOPS scheme and consists of a years training. Part of the training is at a place of work and part is at a college or school.

Payment is by a flat rate allowance.

FES
CODING NOTES

1985

GENERAL POINTS

N.B. These Notes must be read in conjunction with interviewer instructions

THE FORMAT OF THE NOTES

For each question the notes describe in summary form its subject, other questions to refer to, and what to enter at the relevant codes. Further details are given in the section headed "Points to Note" which amplify and give exceptions to the summary notes on what to code.

REFERRALS TO SUPERVISORS AND RESEARCH BRANCH

Where a statement is made in these notes that a budget should be 'queried' or 'referred' this means that it should be referred to a supervisor. It is up to the supervisor to decide whether it needs to be referred to Research Branch. Where the notes state 'refer to research' this should be done automatically.

Where these notes say that an item should be estimated, the budget should always be referred to a supervisor.

PERIOD CODES

Period codes to be used in 'A' and 'B' schedules are:

<u>Period</u>	<u>Code</u>	<u>Period</u>	<u>Code</u>
Weekly	1	Quarterly	6
Two weekly	2	Half yearly	7
Three weekly	3	Yearly	8
Four weekly	4		
Calendar monthly	5	Ten times a year	9

DATE CODES (Standard coding frame)

Dates are coded at Qs 28, 38 and 61 on A Schedule and Q36-38 on B schedule. They should be coded from the following 4 digit frame.

The first two digits represent the month thus

January	01	July	07
February	02	August	08
March	03	September	09
April	04	October	10
May	05	November	11
June	06	December	12

The last two digits of the code should be the last two digits of the year. So January 1985 would be coded 0185.

If the year is known but not the month, code two zeros followed by the last two digits of the year (eg. some time in 1985 but the month not known code 0085). If the year is not known the box should be left blank.

ITEMS PAID FOR BY A PERSON OR AN ORGANISATION OUTSIDE THE HOUSEHOLD

1. A Schedule items

a. Expenses refunded by an employer, or a business, or an organisation for which the informant does unpaid work, are dealt with in the notes on Qs 26-29, 35, 41 and 42 on B Schedule, 16 and 50 on A Schedule.

b. Expenses paid direct by an employer or other organisation should not be shown as expenditure except where payment is made by Supplementary Benefit (see below).

c. Expenditure paid direct by a private individual should be shown at Q82 on Income Schedule.

d. Expenses paid for by a person or organisation for which the informant does not work are dealt with in notes on Qs 78-79 on B Schedule, and Qs 16 and 50 on A Schedule.

e. Items paid direct by Supplementary Benefit Office. The amount paid is entered at relevant question and at Q60, B Schedule ie this is treated as income received from Supplementary Benefit Office and then expenditure by informant.

f. Rent and rate rebates. The actual rent/rates paid should be entered at Q18, 24 or 26 A Schedule. The rebate/allowance should be entered at Q17, 21 or 28 A Schedule. This means that to obtain gross rent or rates payable the amount actually paid must be added to rebate.

g. Items of expenditure recorded on the A Schedule should not appear in the D Schedule. An item of expenditure appearing in both schedules would be a duplication.

2. D Schedule items

The notes on the D Schedule explain how to treat D Schedule items paid for by a person or an organisation outside the household.

SPECIAL CODING ACTION NOTATION

Where information recorded by the interviewer is an estimate, or where the answer is not known or where coders know a wrong amount has been given the following notation must be made in red biro beside the code:-

- ESTIMATE E
- DON'T KNOW DK
- WRONG AMOUNT WA
- REFUSAL R

IMPUTATION

Where informants do not know an amount (DK above) this can give rise to the need to impute amounts. If any expenditure or income amounts have been imputed, this is to be indicated by a code in box A174 (imputed expenditure) or box A245 (imputed income) on 'A' and 'B' schedules respectively. Imputation is based on estimate tables supplied by Department of Employment and OPCS, data supplied by C.S.O., D.O.E., D.H.S.S. benefit leaflets or other reliable published or unpublished data. When imputing, details of households members eg size, income, age and sex are taken into account.

UPDATING IN 1985

Changes since 1984 are indicated by a vertical black line in left hand margin. As and when necessary during the year these notes will be updated. Notification of updates during 1985 will be in the form of amended pages or numbered minutes.

1985 SCHEDULES

The 1985 schedules contain major changes on 1984. The changes arise from

- a. New questions
- b. Deleted questions
- c. Reworded questions
- d. Repositioned questions
- e. New 'derived' codes.

CODING INSTRUCTIONS

A more detailed working document based on these notes is produced by P.A.B. for internal use in OPCS.

FES January 1985

CODING NOTES'A' SCHEDULE PAGE 1

1. This is the only part of any of this schedule where codes need to be ringed. Apart from REF NO and OFFICE USE spaces in the top right-hand corner, all relevant codes on this page should be ringed including "Age", "Age at which full time education completed" and "Reference number of unit".
 2. An entry of so many months for children under one year old should be amended to '0'.
 3. The week number in the OFFICE USE box at the top right hand corner of the page should be a two digit number. The week number is given in Appendix A.
 4. The OFF USE column within the Relationship to HOH column is for coding the relationship. The codes given in Appendix B should be used.
 5. Column 5 - Code 1 applies when both husband and wife are in household even if one is absent at time of interview. Husband or wife is coded 2 when a husband or wife is not a member of the household ie. the non-member has a main residence elsewhere.
 7. Column 6 Current Full Time Education: Nursery classes and schools count as primary schools, but day nurseries do not. The crucial point is whether some education is given, and the rule for deciding this is whether the informant refers to it as some kind of school or class (the interviewer may have made a note here or there may be an entry at Q82 or in the D schedule. If there is no reference elsewhere in the schedules the entry at Col. 7 should be accepted). Children can attend nursery schools from the age of 2. A child not yet attending one of the specified schools should be coded 1.
- Column 7 - There should be an age entered or a dash entered for each person in the household. (NB A dash should not be ringed).
 Where the person is aged under sixteen there should be a dash.
 Where the person is aged sixteen and still in full time education there should be a dash.
 Where the person is aged sixteen and no longer at school an age should have been entered.
 Where a person is aged over sixteen, in full time education and an age has been entered accept the age entered. ie treat as mature student who has returned to study.
 Where an age would have been expected (eg a man of 45 in full time employment) but has not been entered then enter a dash.
 There is no referral back on this question.
8. Column 8 - Ref number of unit. Each member of the household should be coded according to his/her INCOME UNIT. Each person within the same INCOME unit should be coded with the same reference number and the numbers allocated to each unit should be as follows: code "1" for all members of the first unit, code "2" for all members of the second unit, etc. The following rules should be used when coding the INCOME unit code.

a. Children under 16 years of age should be coded as part of their parents' INCOME unit unless in receipt of an earned income equal to, or greater than, the current personal tax allowance for a single person, in which case they are a separate unit.

Children aged 16 years and over but under 25 years should be coded as part of their parents' INCOME unit provided they are receiving full-time education and not receiving earned income equal to, or greater than, the current personal tax allowance for a single person. If married however they are to be given a separate INCOME unit code. Educational grants are not to be accepted as earned income.

Children aged 16 years or over who are not in full time education are to be given a separate INCOME unit code irrespective of income received. Whole time training for a trade or profession counts as full time education. (Exclude TOPS, YTS & CEP). An apprenticeship is not considered full time education.

b. Local Authority foster children should be coded "15" in Ref number of unit column, irrespective of any income they receive, and be coded '1' as head of the income unit. Other children referred to as foster children for whom local authority maintenance grants are not received, should be coded to their foster parents' INCOME unit.

c. Where a wife whose husband is not a member of the household is the HOH in column 2 she should not be coded "head of the unit" in column 8. Instead she should be coded "wife of head" since the absent husband is considered the head of the INCOME Unit, even though not the head of the household. (NB. No entry should be made on this page for the absent husband).

9. Column 9. Interviewer should have noted in box the reason why spender not coded.

APPENDIX A"WEEK" CODES

First Quarter	Code	Third Quarter	Code
Jan. 1st - 7th	01	July 1st - 7th	25
" 8th - 15th	02	" 8th - 15th	26
" 16th - 23rd	03	" 16th - 23rd	27
" 24th - 31st	04	" 24th - 31st	28
Feb. 1st - 7th	05	Aug. 1st - 7th	29
" 8th - 14th	06	" 8th - 15th	30
" 15th - 21st	07	" 16th - 23rd	31
" 22nd - 28th	08	" 24th - 31st	32
Mar. 1st - 7th	09	Sept. 1st - 7th	33
" 8th - 15th	10	" 8th - 15th	34
" 16th - 23rd	11	" 16th - 23rd	35
" 24th - 31st	12	" 24th - 30th	36

Second Quarter	Code	Fourth Quarter	Code
Apr. 1st - 7th	13	Oct. 1st - 7th	37
" 8th - 15th	14	" 8th - 15th	38
" 16th - 23rd	15	" 16th - 23rd	39
" 24th - 30th	16	" 24th - 31st	40
May 1st - 7th	17	Nov. 1st - 7th	41
" 8th - 15th	18	" 8th - 15th	42
" 16th - 23rd	19	" 16th - 23rd	43
" 24th - 31st	20	" 24th - 30th	44
June 1st - 7th	21	Dec. 1st - 7th	45
" 8th - 15th	22	" 8th - 15th	46
" 16th - 23rd	23	" 16th - 23rd	47
" 24th - 30th	24	" 24th - 31st	48

As 1988, 1992 etc are leap years, code 08 will apply to Feb 22nd-29th in those years.

Where an interview takes place on or before 31st December but record keeping commences on or after 1st January the week code is 49.

APPENDIX BRelationship of HOHCode

- 0 HOH
- 1 Wife or Husband
- 2 Son or Daughter (inc. stepson/daughter)
- 3 Son-in-law or Daughter-in-law
- 4 Father or Mother
- 5 Father-in-law or Mother-in-law
- 6 Brother or Sister
- 7 Grandson or Granddaughter
- 8 Other relatives (eg. Niece, Nephew, Brother-in-law, Sister-in-law)
- 9 Other non-relatives (inc. foster children, local authority or other).

SUBJECT. Number of other households at address specified on Address List.

REFER ALSO TO Q: 12, 13, 17-30, 94-97

CODE. _____

N/A

POINTS TO NOTE.

The answer to Q11 is not coded. It should be used to check that the answers to Q12 or Q13 are reasonable.

Where the answer to Q11 is 1" or more there will usually be entries at Qs 13 and/or 94. However:-

- a. it is possible that the other households at the address are not in the informants' accommodation (Q13) or in the same rateable unit (Q94) in which case no rooms occupied by other households would be entered.
- b. it is possible that there may be other households at the address which are ineligible and therefore not interviewed. However, these households should be counted at Q11 for purposes of abating rateable value.
- c. where there are no other households living at the address, rooms used for business may be recorded at Qs 12 or Q94.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 12 & 13

SUBJECT: Number and type of rooms in informants' accommodation.

REFER ALSO TO Q: 11, 14, 17-30, 94-97 A Schedule, 26 & 41 B Schedule

CODE:

1. At All4 code total number of rooms in the left hand grid.
2. At All1 code total number of rooms in the left hand grid occupied solely by th's household
3. At All2 code total number of rooms in the left hand grid which are shared with other households
4. At All3 code total number of rooms in the left hand grid which are let or sub-let to other households but are not shared.

POINTS TO NOTE:

1. The left hand grid should contain all the bedrooms, kitchens, sculleries used for cooking, living rooms, and rooms used partly for business at the sample address which are owned, rented or occupied rent free by the household.
2. The numbers of other rooms at Q12 or 13 (bathrooms, garages, business rooms etc) should have been entered by the interviewer in the right hand grid. These details may be important should rateable value and rates paid need to be abated (see notes against Q96 & 97 (A Schedule) and Qs 26 and 41 (B Schedule)).
3. Some of the rooms listed under "other-specify" in the right hand grid may in fact come under one of the headings in either the left or the right hand box. If so they should be transferred. In particular box rooms, attic bedrooms, sun lounges (if used throughout the year) should be transferred. However, cellars, utility rooms, rooms less than 6' square, rooms without a window/sky-light and attics without a window/sky-light or without floor boards should not be transferred.
4. All4 and All1 should be coded on all schedules. Thus where no rooms are let or shared, the same figure should be entered at these two codes.
5. The entry for garages may need amending as a result of the entry at Q14 (see general note 2 on Q14).
6. Income from letting or sub-letting is recorded at Q78 B Schedule.

ADDITIONAL NOTES (give date and reference)

SUBJECT Possession of garages by spenders in household

REFER ALSO TO Q. 12, 13, 94-97

CODE

1. At A115 code total number of garages owned, rented or rent free.
2. At 189 code total amount of rent, ground rent and rates paid separately for garages.

POINTS TO NOTE.

GENERAL

1. Garage and accommodation tenure type can differ eg garage rented and accommodation owned.
2. Different garages used by household members can be of different tenure types eg one owned, one rented.
3. Amount entered at 189 should apply only to garages and should include no elements relating to accommodation.
4. If an amount entered at 189 is found to be included in an entry at another question (eg rent at Q18) then the entry at that question should be abated by the amount at 189.
5. a. If payments for a garage are accepted by coders at 189 the garage should not be covered by the rateable value at Q96. If the garage has been entered at Q12 or 13 it should be deleted and not used in calculations concerned with abating and apportioning rent, rates and rateable value on the accommodation.
b. If payments for a garage are not coded at 189 the garage should be assumed to be covered by the rateable value at Q96. It should be entered at Q12 or 13 if not already recorded there and used in abatement and apportionment calculations.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

c. Note A at Q96 explains when the rateable value at Q96 has to be adjusted to fit in with the answer to Q14.

Further Points

1. Sheds should be counted as garages when used as such.
2. A double garage counts as one garage unless part is let in which case it counts as two garages.
3. Income from letting or sub-letting garages is included at Q78 B schedule.
4. Car-ports should be included as garage if rated.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q. 15

SUBJECT. Length of time HOH has lived at address.

REFER ALSO TO Q. 1.

CODE: at A131 code number of years and months at address

POINTS TO NOTE:

This is a new question for 1985

It is asked of H.O.H. only

The length of residence should be inserted using the following table

Less than a month	0100
One month	0100
Two months	0200
Three months	0300
Four months	0400
Five months	0500
Six months	0600
Seven months	0700
Eight months	0800
Nine months	0900
Ten months	1000
Eleven months	1100
One year	0001
Two years	0002
Three years	0003
etc.	

Where a length of residence is entered as months and years (eg 11 years 6 months) enter only the complete years. Months should be entered only where residence is less than one year.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 16

SUBJECT: Type of tenure

REFER ALSO TO Q:

CODE:

1. At A120 code type of tenure (see note 2)
2. At A109 code '7' if rented from housing association other than Scottish Special Housing Association, Northern Ireland Housing Trust (ie two codes, one in A120 and one in A109).
3. At A110 code 1 if tenancy dependent on job.

POINTS TO NOTE:

One of the following codes, relating to type of tenure, should be entered at A120.

<u>Code</u>	<u>Types of Tenure</u>
1	Rented from a Council, or New Town Corporation (INCLUDE: SCOTTISH SPECIAL HOUSING ASSOCIATION NORTHERN IRELAND HOUSING EXECUTIVE)
1 at A120 and 7 at A109	Rented from housing association (EXCLUDING SCOTTISH SPECIAL HOUSING ASSOCIATION NORTHERN IRELAND HOUSING TRUST)
2	Rented from someone else unfurnished (Include charitable organisations, and housing trusts).
3	Rented from someone else furnished.
4	Owned with a mortgage.
5	Owned outright.
6	Neither owned nor rented.

NOTE

- 1 In some cases an interviewer may have noted that although a house is owned outright, it is owned leasehold and a mortgage has been secured to buy the freehold. In such cases code as "owned with a mortgage".

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D)

ii Where house is being purchased from a local authority and a combined mortgage and rent is paid treat as "Owned with mortgage Code 4'.

Where (d) is answered 'yes Y' the person paying the rent at (d) (iii) determines whether the property is treated as rent free or rented:

RENT FREE ACCOMMODATION

Accommodation is treated as rent free if one of the following conditions is satisfied.

- i. Accommodation is provided rent free (a) by an informant's employer, or (b) by an organisation, provided that the normal activities of the informant are to further the cause of the organisation. This condition will normally apply to Church of England clergy and other ministers of religion.
- ii. Accommodation where an unknown rent is paid by someone outside the household who is not the informant's employer.
- iii. Accommodation which is owned by someone outside the household other than employer and provided rent free.

NOTE RENT FREE (IE RENTED)

Accommodation is considered to be rented if a known rent is paid by someone outside the household who is NOT an employer and the following action should be taken.

- i. Recode Q16.
- ii. If household is given the money to pay rent and rates, etc -
 - a. Enter rent at Q18 rates at Q24 etc. and follow instructions at those questions.
 - b. Enter the total amount received as income at Q81 on income schedule.
- iii. If household does not receive money for rent, rates etc. but these are paid directly by someone outside the household:-
 - a. Delete any amounts of rent or rates etc entered at Q18, 24 etc.
 - b. Enter the total amount paid on households behalf at Q82 on income schedule.

ADDITIONAL NOTES (give date and reference)

Where an individual has 100% rebate the accommodation is to be considered as rented at Q16 and Q17.

N.B. Rent etc. may not have been reported by interviewer at Q17 or Q24 but at Q81 or Q82 on income schedule.

Tenancy dependent on a former job

A "1" should not be entered at A110 in this case. This may occur when an informant has changed jobs and his tenancy is still held by virtue of the job he left.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE A

Q. 17-29

SUBJECT Housing Benefit

REFER ALSO TO Q. N/A

CODE.

N/A

POINTS TO NOTE:

Prior to 22nd November 1982 help with housing costs could be obtained in two ways, as follows

a. From Department of Health and Social Security

Supplementary Benefit to cover rent, domestic rates, water rates, sewerage rates and environmental rates.

b. From Local Authority

i. Rent rebate/ allowance to cover rent in local authority accommodation (rebate) or private accommodation (allowances)

ii. Rate rebate to cover domestic rates, regardless of type of tenancy.

Local authorities did not help with water rates, sewerage rates or environmental rates.

From 22nd November 1982 a new scheme has been introduced in two stages. The scheme is called 'Unified Housing Benefit' although the public may refer to it as a 'rebate' or just 'housing benefit'

Stage 1 22nd November 1982

Recipients of Supplementary Benefit that covers housing costs, who live in local authority housing and have no non-dependents (eg working son) living with them, transferred to the new scheme.

This means that their supplementary Benefit was reduced by the amount of housing cost element and they get a 100% rebate on rent and domestic rates. ie the informant does not have to pay any rent/rates to local authority (the DHSS reimburse the local authority for loss of rent/rate payment). They also get a rebate of water, sewerage and environmental rates if these are included in rent.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

If water, sewerage and environmental rates are paid direct to water authority these continue to be met by a Supplementary Benefit payment.

If a household meeting the above requirements applied for Supplementary Benefit after 22nd November 1982 they are put on the new scheme.

Stage 2 April 1983

Additional householders coming into the scheme in April 1983 comprised

- a. Those who apply for Supplementary Benefit but do not meet the requirements of Stage 1 eg. live in private property, have non-dependents living with them, do not qualify for full housing costs.
- b. Those who apply to the local authority for a rate rebate or rent rebate/allowance ie the same people who would be eligible for rebate/allowance before April 1983.

These householders will receive help as follows:

- a. Rate rebate for domestic rates.
- b. Rent rebate or allowance.

N.B. Help with water, sewerage and environmental rates will be met by Supplementary Benefit except in the cases where the householder meets the November 1982 criteria.

Documentation

Where an applicant for Supplementary Benefit is told by the DHSS that all of their housing costs will be met by local authority it is the responsibility of the DHSS to notify the local authority. The local authority will notify the applicant in writing of the grant of rebate or allowance.

Where an applicant to the local authority for rate rebate or rent rebate/allowance, is granted the rebate/allowance, they will be notified, in writing, by local authority.

Housing Benefit Supplement

Some rebate recipients will also receive this benefit as part of their housing benefit entitlement - see Q29

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES Jan 85

SCHEDULE: 'A'

Q. 17

SUBJECT 100% Rent Rebate/Housing Benefit

REFER ALSO TO Q 23-29

CODE

1. At 174 code amount of rent paid by local authority on households behalf
2. At 211 code amount included in rent for heating, if known
3. At 212 code amount included in rent for other services, if known
5. At A168 code '1' if non-council tenant does not know rent
6. At A132 code 1-8 as detailed below.

POINTS TO NOTE

Q 17 has been changed for 1985. It has been amended to ease the burden on informants living in council property and to provide additional information for DHSS and DOE.

Q17(a), 17(a)(1), 17(a)(11)

These questions are completed for council tenants receiving 100% rent rebate/housing benefit. The interviewer obtains the information from the local housing/ rent offices.

At 174 code the weekly rent and period. If the rent includes rates, heating, water rates etc these should all be included ie. 174 is gross rent paid on households behalf.

At Q17(a)(11) the interviewer will have recorded what is in the rent at 174. Codes 211, 212 and A132 should be coded to indicate what is in the rent. NB domestic rates are not itemised at these codes because if these are included in rent this will be known from Q23.

At 211 code amount included in rent for heating

At 212 code amount included in rent for other services (eg lift)

At A132 use the following code frame

Rent + WR + SR + ER	code 1
" " " " + heating costs (amount not known)	" 2
" " " " + other services (amount not known)	" 3
" " " " + heating costs and other services (amount not known).....	" 4
Rent only	5
Rent + heating costs (amount not known)	6
Rent + other services (amount not known)	7
Rent + heating costs and other services (amount not known).....	8

NB Although use is not made of domestic rates at Q17(a)(11) the amount shown at the question can be used at Q28 if the rebate is not known.

At Q17(b), b(1), b(11) the interviewer will have recorded details of rent paid on behalf of informants in non council accommodation but who are receiving 100% housing benefit. If the answer to (b)(1) is 'Don't Know' impute rent and code '1' at 168.

For all rent imputation at Q17(a) and (b) use current DOE tables as best estimate. These cover pure rent only.

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 18-23

SUBJECT: Rent for accommodation

REFER ALSO TO Q: 17 & 24

CODE:

1. At 010 (Q18) code actual rent paid (incl rates if not paid separately) when services are not included in rent (see Q22).
2. At 230 (Q21) code rent rebate or allowance.
3. At code 027 (Q22) code expenditure on services.
4. At 020 (Q22), in every case where services are included, code rent (and rates if not paid separately) after deduction of service element OR actual rent paid if service element cannot be deducted.
5. At A173 (Q23) code '1' if rent included rates.

POINTS TO NOTE:

1. The rent at 010 (Q18) or 020 (Q22) should be adjusted to allow for rent holidays (Q20). It should be the actual rent paid by informant ie net of rebates.
2. Where there is a rent holiday the amount given at 010 (Q18) should be multiplied by the number of weeks it is paid (Q19) (ie 52 weeks less the number of weeks holiday) to give annual rent, which should be coded with period code 8.
3. Where there is a rent rebate/allowance (Q21) reference should be made to Q21 to check whether rent quoted is before or after deduction of rebate/allowance. If rebate/allowance has been deducted then the rent at 010 (Q18) should be accepted. If rebate/allowance has not been deducted it should be deducted from rent at 010 on a common time period basis.
4. Common time period basis means that the amounts are brought to a common time basis eg if rebate is £9.00 for three months and gross rent payment is £40.00 a month, then one months rebate (£3.00) should be deducted from £40.00 to give a net monthly rent of £37.00.
5. Where rates are included in rent (Q23) any rate rebate which has been included in rent/rates payment should be deducted on a common time period basis to give net rent/rates payment. Rate rebate is shown at Q28.
6. If a rent and rate rebate is received as a combined amount, proportion the combined rebate in the same proportion as rent and rates are paid on the property. Where rates are paid in the rent the 'rent' to be used for proportioning is rent minus a rates element calculated from net rateable value (Q96) and rates poundages (page 40).

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D)

7. The service element at Q22 should be considered to be related to rent at 010 (Q18). This means that adjustments made to rent in regard to rent holidays apply equally to services. Rebates and allowances do not relate to service.
8. If details of a rebate covering both rent and rates have been given at Q18-22 the amount estimated to be for rates rebate should be transferred to Q28 code 040 with the period covered by the rebate. (See Q28 regarding the coding of A148).
9. All caravan/houseboat/mobile homes rent should be included at Q18 except site rent which should be shown at Q30.
10. If rent rebate is not known it should be imputed using D.O.E. rebate tables.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 24

SUBJECT: Domestic rates paid on accommodation

REFER ALSO TO Q: 17, 18, 23, 26, 27-30, 96 page 40 'A' schedule and Q81, 82 'B' schedule

CODE: _____

At 030 (Q24(b)) code last net rate payment actually paid.

POINTS TO NOTE:

1. GENERAL

Net rate payment = domestic rates (after deduction of rebates) + SEWERAGE RATES + ENVIRONMENTAL RATES AND WATER RATES IF THEY ARE PAID WITH DOMESTIC RATES.

If a rebate has been included it should be deducted on a common time period basis (see Q28).

2. RENT FREE ACCOMMODATION

i. If informant pays rates treat entries as above.

ii. If a private individual gives the informant money to pay rates (Q81 'B' schedule) estimate rates and enter at 030 and at Q79 (352) B schedule.

iii. If a private individual pays rates direct (Q82 B schedule) do not make entry 030.

iv. If an employer or similar organisation pays rates direct do not enter them at 030.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE3. SUB-LET ACCOMMODATION

If an informant sub-lets for a rent and also pays all the rates for the property his rate payment should be abated in proportion to the number of rooms let (see notes at Q95-97). The rent received at Q78 'B' schedule should be abated by the same amount. The rent payment shown in sub-tenants schedule should not be abated but assumed to include rates.

The reason for this rule is that effectively the sub-tenant pays rates for his/her part of the accommodation and this should not appear in the renters schedule as income or expenditure

Where the sub-tenant pays rates to the renter separate from rent then abate the renters rates payment by that amount.

If the sub-tenant does not pay rent or rates (eg mother living with son) then the total amount of rates paid by the sub-letting informant should be coded at 030. No expenditure on rates should be shown in the sub-tenants schedule. N.R.V. of rateable unit is proportioned (see Q96).

4. DISABLED DRIVERS

Disabled drivers can be exempted from garage rate payments

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 25

SUBJECT: Accommodation connected to mains sewerage

REFER ALSO TO Q: Page 40, Q26

CODE: _____

N/A

POINTS TO NOTE:

This question is used to check whether sewerage rate poundage should be entered at code 232 page 40

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q 26

SUBJECT Separate water, sewerage and environmental rate payment.

REFER ALSO TO Q: 17, 18, 24-30, 96 and page 40

CODE _____

At 050 code last actual water, sewerage and environmental rates payment.

POINTS TO NOTE.

1. GENERAL

Water rate payment should include environmental rates and sewerage rates which are paid together.

Where water, sewerage and environmental rates are collected with domestic rates there should be no entry at 050.

2. RENT FREE ACCOMMODATION

Treat in same way as domestic rates at Q24

3. LET OR SUB-LET ACCOMMODATION

Treat in same way as domestic rates at Q24

Where domestic household has a meter (noted by interviewer) treat as payment of water rates in normal way.

NB Water rates may have been included in a rate rebate at Q17 if 100% rebate has been granted and included water rates.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 27

SUBJECT: Separate land drainage rates.

REFER ALSO TO Q:

CODE:

At 030 code last payment of drainage rates.

POINTS TO NOTE:

Land drainage rates are generally paid to special drainage authorities and should not be confused with sewerage or water rates.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 28

SUBJECT. RATES REBATES

REFER ALSO TO Q. 16, 17, 18, 23, 24, 25, 26 & 29

CODE.

1. At A140 code '1' if any rebate received in last 12 months.
2. At 040 code amount of rebate deducted from last rates payment.
3. At A171 code '1' if amount of rebate deducted from last rates payment not known.
4. At A148 code period given in answer to Q24 (a) followed by period given at Q28 (a) (iii).
5. At 047 code the rebate received as direct lump-sum refund in the last 12 months
6. At A172 code '1' if amount of lump sum rebate not known.
7. At 014 code amount of the most recent direct lump-sum refund and the period it covered.
8. At A127 code the date of the most recent lump-sum refund.

NOTE THAT 040 AND A171 AND 047 AND A172 CAN BOTH BE CODED IF REBATE HAS BEEN IMPUTED WHEN INFORMANT DID NOT KNOW AMOUNT OF REBATE.

POINTS TO NOTE.

GENERAL

NB. This question should have been asked of all informants.

1. If Q28 is answered yes ... Y then there should normally be an amount at 040 unless the rebate was a lump sum (047) or was deducted from an earlier rates payment.
2. If the last rate payment at Q25 was before deduction of rebate (Q28 (a) (iii)) the rebate should be deducted.
3. The period code at code 040 for a rebate deducted from the last rates payment should be the period covered by the rebate. This may differ fro the related rates payment at 030 (Q24).
4. At A148 code 2 digits. The first should be the period code entered at 030, Q24 or 010 at Q18, the second should be the code for the period given at 040, 28 (a) (ii). This code enables the computer (which stores values in weekly terms) to get back to the amount entered at 040 and give it the period code indicated by Q28 (a) (i), so that the entry at 040 can be treated as having either the period code indicated by Q24 or that indicated by Q28 (a) (ii).

If information is not available then leave code A148 blank.

Code A127 from standard frame (see page 1).

5. If rebate is not known it should be imputed. If the rebate is 100% use NRV x poundage or the amount given at 17(a)(ii). Otherwise use DHSS formula.
6. Anyone answering 'Yes' at Q28 should have details of rebate at Q28(a) and/or (b). Where an informant has received 100% rebate at Q17 and rent included rates (Q23) then Q28 should be coded 'Yes' and rebate details entered at (a) and/or (b).

ADDITIONAL NOTES (give date and reference)

143

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 29

SUBJECT: HOUSING BENEFIT SUPPLEMENT RECEIVED BY THOSE RECEIVING HOUSING BENEFIT
AND/OR RATES REBATE.

REFER ALSO TO Q: 17, 28

CODE: _____

At A155 code 1 if DK at 29

At 190 code amount of Housing Benefit Supplement

At A156 code 1 if DK at 29 (a)

POINTS TO NOTE:

Housing benefit supplement is part of the Housing Benefit scheme. It is paid as part of the scheme in the form of an increased rebate/allowance.

There is no reference back or imputation at this question

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q 30

SUBJECT: Ground rent, site rent, feu duty, chief rent, service charge, compulsory or regular maintenance charges, etc.

REFER ALSO TO Q

CODE.

At 060 code last payment

POINTS TO NOTE:

Note site rent is included for caravan dwellers.

Ensure that charges that should not appear here (eg drainage rates) are transferred to correct questions.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 31 & 32

SUBJECT: Source of mortgage or loan used to purchase informants' accommodation at sampled address. Last mortgage payment.

REFER ALSO TO Q: 16, 33-40

CODE:

1. At A119 (Q31) code source of mortgage or loan.

POINTS TO NOTE:

One of the codes 1-5 should be entered at code A119 (Q31) according to the source of the loan or mortgage. Note that where an endowment policy is taken out and through this a mortgage secured from a Building Society, "1" should be coded at A119 and not "4".

The interviewer may have noted that the informant has more than one mortgage. If the second mortgage is for purchase of this accommodation, then it should be included at Qs 31-38. If the coding at Q 32 is the same for both mortgages then add the amounts together at Q 33 or 36. If the coding at Q 32 differs then enter the separate amounts at 33 and 36. The source of the mortgage at Q31 should be that of the largest mortgage. If any mortgage is not for home purchase (ie it is for home improvement or some other purpose) it becomes in effect a loan and should be at Q67 etc.

Where a loan has been taken out for the deposit on a house, treat as mortgage for house purchase.

Where a property is being purchased from a local authority and both rent and mortgage is being paid treat as L.A. mortgage. The combined payment is treated as mortgage.

A mortgage for a second dwelling (eg. holiday home) or for a house to be moved into are 'D' schedule items.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q. 33-35

SUBJECT Last payment covered interest only.

REFER ALSO TO Q 31 & 32, 41 & 42

CODE:

At 130 (Q34) code last interest payment only

POINTS TO NOTE.

The amount shown at code 130 (Q33) as the interest on a mortgage or loan, may have to be abated because it included a premium on an endowment policy covering repayment of principal (such a premium should be checked against Q46 to see that it is included there: if it is not, then it should be transferred and coded at code 199). The amount may also have to be abated because it includes payment towards insurance on structure, mortgage protection policy or some other payment (see Q42)

N.B. The principal may not be covered by any security because the informant is unemployed and is currently paying interest only.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 36-38

SUBJECT: Last payment covered interest and principal

REFER ALSO TO Q: 31 & 32, 41 & 42

CODE:

1. At 200 (Q36) code the last instalment.
2. At 150 (Q38) code the interest paid over the last year for which the informant has figures.
3. At A158 (Q38) code starting date of period covered by interest paid.
4. At A159 (Q38) code ending date of period covered by interest paid.

POINTS TO NOTE:

Where the interviewer has noted that the interest amount at Q38 covers only part of the year because the mortgage has been held for less than 12 months the amount entered at code 150 should be that amount grossed up to annual amount. The dates at A158/A159 should indicate period of the original entry.

The coding frame to be used for coding dates at A158 and A159 is given at front of these instructions, eg JAN = 01.

The last payment may have to be abated because it included an element for insurance on structure, mortgage protection policy or some other item (see Q42).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q: 39 & 40

SUBJECT. Length of time interest and principal mortgage has run
and has to run

REFER ALSO TO Q. 36-38

CODE

1. at A133 code number of years mortgage has run
2. at A134 code number of years mortgage has to run
3. at A135 code '1' if DK at 39, code '2' if DK at 40
and code '3' if DK to 39 AND 40.

POINTS TO NOTE:

These are new questions for 1985

There will be no reference back on these questions.

If the number of years is less than 10 use a leading zero eg 01, 02 - 09.

A period of less than a year should be coded as one year.

N.B. These questions apply only if mortgage payment covered interest
and principal.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 41

SUBJECT: MORTGAGE PAYMENTS NET/GROSS OF TAX

REFER ALSO TO Q: 33-38

CODE:

At A163 code 1, 2 or 3

POINTS TO NOTE:

A mortgage payment gross of tax is one where tax relief on mortgage interest was obtained through PAYE etc.

A mortgage payment net of tax is one where payment has been reduced by the amount of tax relief allowed. This means that tax relief is not obtained through PAYE etc.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q 42

SUBJECT Insurance on structure, mortgage protection policy or other payment INCLUDED in mortgage payment.

REFER ALSO TO Q: 33-40

CODE: _____

N/A

POINTS TO NOTE

If the last mortgage payment at Q33 or 36 is shown to have included a payment for insurance on structure, mortgage protection policy or other payment the following action should be taken:

1. Abate the last mortgage payment by the amount included
2. Check amount included against Q43 (insurance on structure) or Q46 (mortgage protection policy) or whatever other question is appropriate. If amount not included then it should be entered.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 43-45

SUBJECT: Insurance premiums on structure, contents of accommodation and personal possessions.

REFER ALSO TO Q: 42

CODE:

1. At 110 (Q43) code premiums paid on structural insurance.
2. At 168 (Qs44, 45) code premiums paid on contents or personal possessions insurance

POINTS TO NOTE:

Where the insurance premium on structure and contents have not been given separately, interviewers should have entered a total premium covering both insurances and obtained separate figures for the insured value of the house and the insured value of the contents. These values should be used to calculate a notional premium based on 0.15% for the structure insurance and 0.25% for the contents insurance. If the values of house and contents are combined they must be apportioned before calculating notional premium. These notional amounts should be proportionally adjusted so that their sum is equal to the total premium actually paid. The adjusted premiums should then be entered at codes 110 (structure) and 168 (contents).

Where insured value of personal possessions has to be assessed it should be at notional premium of 0.25%.

Fridge and Freezer insurance premiums

1. If reference not made to contents and/or maintenance code at 168
2. If reference to maintenance only, delete and transfer weekly equivalent to record books unless paid by standing order at Q78.
3. If reference made to contents and maintenance code 75 per cent of premium at 168 and treat remaining 25 per cent of premium as at 2) above

T.V. Insurance premiums, washing machines etc. If reference to maintenance only delete and transfer weekly equivalent to record books unless paid by standing order at Q78.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE A

Q: 46 & 47

SUBJECT. Insurance premiums

REFER ALSO TO Q. 35 & 42

CODE.

1. Enter code 196 if life assurance premium (except house purchase endowment or mortgage protection), provided policy taken out before April 1984. (Q 46).
2. Enter code 197 if life assurance premium (except house purchase endowment or mortgage protection), provided policy taken out in April 1984 or later. (Q 46).
3. Enter code 199 if house purchase endowment premium, provided policy taken out before April 1984. (Q 46)
4. Enter code 198 if house purchase endowment premium, provided policy taken out in April 1984 or later (Q 46).
5. Enter code 208 if mortgage protection premium, provided policy taken out before April 1984. (Q 46)
6. Enter code 211 if mortgage protection premium, provided policy taken out in April 1984 Or later. (Q46).
7. At 206 code premiums on policies other than medical. (Q 47)
8. At 229 code premiums for medical assurance. (Q 47)

POINTS TO NOTE.

Note that in 1985 there is a new question regarding when the policy was taken out. This affects coding of Q 46.

Since April 1984 tax relief is no longer allowed on new life linked assurance policies. The CSO and Treasury are interested in distinguishing between the new policies and the old ones, prior to April 1984.

Private pensions, superannuation and widows and orphans insurance which are not deducted from salary but are entered should be coded 196/7.

Codes 196/7 apply to all life assurance premiums irrespective of the type of policy or name of company.

Holiday insurance should be included in record books if paid during record keeping period. It should be coded as holiday expense. Holiday insurance should be deleted if shown at Q47.

Where an endowment policy has been taken out to cover a mortgage, the premium should be entered at code 198. Details of these policies should be given at Q46 and also at Q35. A check should always be made to ensure that any entries at Q35 are accounted for at code 198. If informant did not know when policy was taken out treat as if before April 1984.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 46 & 47

POINTS TO NOTE (CONT'D):

Code 206 is for coding details of regular premium for any other insurances policies, such as personal accident, not included elsewhere on the A schedule. The following are specifically excluded from this question:

Insurance on TV sets - these are really maintenance payments and should be coded in the record books.

Insurance on car windscreens - these should be included with other car insurance at code 188 (Q62 & 64)

Insurance of personal goods such as jewellery, furs, cameras, etc - these should be included at code 168 (Q45).

Medical insurance should be coded at code 229 (Q45). Examples of medical insurance are:

BUPA, PPP, WPA, EHAS, CSMAA, BCWA, PHSA, MSHCA, P.P.A., RPA, HCS.

Code Friendly Societies and sick clubs to 206.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q: 48

SUBJECT. Possession of, rent and rebates for television sets, television games and home computers

REFER ALSO TO Q: 49

CODE

1. At A105 code the number of television sets in accommodation.
2. At A136 code '1' if television game has been coded 'yes....1'
3. At A137 code '1' if home computer has been coded 'yes 1'.
4. At A106 code 1, 2 or 3 according to method of rental payment.
5. At 195 code last payment of rent on TV set and/or TV game and/or home computer if not paid by slot meter.
6. At 194 code last gross rebate from slot meter.

POINTS TO NOTE.

1. The following changes have taken place in 1985.
 1. Number of television sets should be coded.
 2. Question extended to cover rental and ownership of TV games and home computers
 3. A related question on video recorders has been introduced. (Q49).
2. Combined rental should be entered at 195 excluding any element for video recorders, which should be entered at Q 49.
3. Combined gross rebate should be entered at 194 excluding any element for video recorders.
4. If there are differing rental arrangements use the following code frame at code A106.

A. Regular payments	= code 1
B. Slot meter	= code 2
C. Other	= code 3
A & B	= code 4
A & C	= code 5
B & C	= code 6
A, B & C	= code 7
5. A shared TV set etc should be shown in all sharing households schedules.
6. Gross slot meter rebates should be shown at code 194. Slot meter payments in diaries should not be abated.
7. If interviewer notes that items are being bought on credit by slot meter payment check Qs 69-76
8. If rent of TV aerial is included code at 195.

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 48 (Cont'd)

POINTS TO NOTE:

9. If no rent is being paid because the set is broken, the situation should be coded as 'no TV set'.
10. Where a TV set which is owned is broken it should be accepted as TV set in accommodation if a TV licence has been purchased in last 12 months. If licence not purchased code as 'no TV set'.
11. Where a TV set is owned but rediffusion service is provided, Q48 (a) should be coded 'No ... X'. Any payments for the service which are shown in the record books should be coded 799. However, if one payment covers both the rent of a set and the service provided, the full amount should be coded as rent of TV.
12. At times of writing any monthly amount of £25.00 should be taken to include video amount and budget referred.
13. Where a TV rental is paid by someone outside the household a code 1, 2 or 3 should be entered at code A106 on the assumption that the rental agreement was signed by the spender in the household. If the payment is made direct to rental company by someone outside household there should be no entry at codes 194 or 195. If interviewer notes that TV was rented on spenders behalf by someone outside household and is paid for direct by someone outside household then there should be no entry at codes A106, 194 or 195.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 49

SUBJECT. Video Recorder Rental

REFER ALSO TO Q: 48

CODE

1. At A141 code '1' if video recorder in accommodation
2. At A142 code '1' or '2' depending on method of rental payment
3. At 254 code last rental payment

POINTS TO NOTE:

This is a new question for 1985.

Video rental should no longer be recorded in diary.

Rental for TV set, TV game, Home Computer or video tape should not be included at this question.

A shared video should be included on each sharing households schedule.

If no rent is paid because video recorder is broken then code as no video

Where a video rental is paid by someone outside the household a code '1' or '2' should be entered at A142 on the assumption that the rental agreement was signed by spender in household. If the payment is made direct to the rental company by someone outside the household there should be no entry at 254.

If the interviewer notes that video recorder was rented by someone outside household on spenders behalf, and the rental is paid direct by the person outside the household, there should be no entries at A142 or 254

ADDITIONAL NOTES (gives date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 50

SUBJECT: Possession of telephone, and telephone account payment.

REFER ALSO TO Q:

CODE: _____

At A102 code '1' if the answer to this question is 'Yes'.

At 166 code (household's share of) last telephone account.

POINTS TO NOTE:

If the answer to this question is 'Yes', a '1' should be entered at code A102. A shared telephone should appear only in the subscriber's schedule. An extension should not be considered as an installed telephone.

If the amount of the last telephone account was shared by anyone outside the household then the amount shown at Q50(a) should be entered at code 166: if the amount was shared the interviewer should have entered the informant's household's share at code 166.

Telephone installation charges should be coded at this question and not in diaries.

If at part (c) the interviewer has noted that informant received money for part (or all) of the account from someone outside the household who did not in fact have any use of the telephone (eg mother's account paid for by son) the whole of the account should be entered at code 166. The amount given for payment of account by someone outside household should be entered at Q81 on Income Schedule.

If account is paid direct by employer or someone else outside household do not enter at 166. (If paid direct by a private individual it should have been entered at Q81 on Income Schedule).

If the informant has answered Yes at (c) (iii) check questions 26, 29, 35, 41 and 42 on the B Schedule to see if this is a refund of expenses for paid or unpaid work. If so accept the informant's share at code 166. If not refer to supervisor.

If bill has not been paid at sampled address the bill from previous address should be coded - if not given, an imputation should be made.

Where a bill is the initial bill and covers past short term rental and calls as well as installation charge and three months rental in advance, the period code should be 6.

Some telephone accounts are paid by budget account. Code amount of last account if given. If budget account payment only given, code this.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE A

Q- 51

SUBJECT: Licences

REFER ALSO TO Q: 93

CODE:

At 181 code fees for TV licences bought in the last 12 months.
At 186 code fees for driving licences bought in the last 12 months.
At 185 code fees for any other licences bought in the last 12 months.

POINTS TO NOTE.

No action should be required at this question as interviewers will have entered the amount, and the period codes are pre-printed: however a check should be made that the amount given is consistent with the current licence charge (bearing in mind that an amount given could be for more than one licence).

Only statutory licences should be accepted at this question. Marriage certificates should also be accepted.

Some local authorities provide vouchers towards a TV licence for retired persons not wanting travel vouchers (Q98). Where this occurs the total cost of licence less the value of voucher should be entered.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 52

SUBJECT: Possession of washing machine, refrigerator/deep freezer, central heating, payments for oil for central heating.

REFER ALSO TO Q:

CODE:

1. At A108 code "1" if there is a washing machine
2. At A164 code "1" if there is a refrigerator with a freezer unit attached (ie separate doors)
3. At A165 code "1" if there is a separate refrigerator
4. At A166 code "1" if there is a separate deep freeze
5. At A150 code "1" if there is central heating by electricity
6. At A151 code "1" if there is central heating by gas
7. At A153 code "1" if there is central heating by solid fuel
8. At A152 code "1" if there is central heating by oil
9. At A154 code "1" if there is central heating but the fuel is unknown
10. At 017 code the total expenditure on oil for central heating in the last 12 months.

POINTS TO NOTE:

The following definitions should be followed:

A washing machine is a machine which has an electricity operated agitator/pulsator. The water may be heated within the machine either by electricity or gas or it may be unheated. It may be with or without a wringer or any drying mechanism.

Therefore, a wash boiler with hand agitator should not be considered as a washing machine.

Where a washing machine is not owned by the household but is available for continuous use "1" should be coded at A108 provided the machine is owned by a household in the accommodation and is not a communal one as for example in a block of flats.

Where a refrigerator and/or deep freeze is not owned by the household but is available for continuous use "1" should be coded at A164, A165, A166 as appropriate.

Central Heating includes partial or background systems and night storage heaters. The type of central heating should be based on the type of the source of heat energy, eg. electricity, gas, oil and solid fuel.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85 .

SCHEDULE. A

Q: 52 (cont'd

POINTS TO NOTE.

In any multi-household blocks of flats where the source of heating for central heating is situated outside the household it might be possible for the informant to know the type of the source of heat (fuel) and this should be coded. Usually it will not be known in which case the DK code applies.

In a multi-household rateable unit where the source of heating is situated in one of the households, the type of central heating as reported by informant should be accepted.

CENTRAL HEATING OIL

1. If amount paid is not known check Q76 to see if paid by standing order. If standing order payments are made, gross up to annual amount and enter this at Q71.
2. If standing order is not used refer to supervisor for estimate. Do not use 'D' Schedule entries for estimate.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 53

SUBJECT: FUEL MAINLY USED FOR ROOM HEATING IN WINTER

REFER ALSO TO Q:

CODE:

At All6 code fuel mainly used.

POINTS TO NOTE:

In the majority of cases there will be only one code to enter in box All6. If multicoding is necessary then use the code frame below.

Include as coke the following:

Smokeless fuel; Coke; Anthracite; Coalite; Dry Steam Nuts; Homefire; Phurnacite; Rexco; Sunbrite; DK brand name but know it is a smokeless coal. Small nuts; Welsh boiler nuts; nuts (nes); Fireglo; Cleanglo; Gloco; stove nuts; Sebrits; No 2 gas coke; Phimax; Burnbrite; Homefire; Room heat; Wonderco, etc.

If more than one code ringed, code as follows:

Coal, Electricity, Gas	8	Coal, Electricity, Gas, Oil	21
Electricity, gas	9	Coal, Coke, Electricity	22
Coke, electricity	10	Coal, Coke, Other	23
Coal, electricity	11	Coal, Gas, Oil	24
Coal, coke	12	Coal, Electricity, Other	25
Coal, gas	13	Electricity, Gas, Oil	26
Coke, gas	14	Electricity, Other	27
Coal, other	15	Coal, Coke, Gas, Other	28
Coal, oil	16	Gas, Other	29
Electricity, oil	17	Oil, other	30
Gas, oil	18	Coal, Gas, Other, Oil	31
Coke, other	19	Coal, Oil, Other	32
Coke, electricity, gas	20	Coal, gas and other	33
		Coal, electricity, oil	34
		Electricity, Gas, Oil and other	35

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 54

SUBJECT. Gas and electricity supply

REFER ALSO TO Q. 55-61

CODE:

1. At A103 code 5-8 according to whether gas, electricity, both or neither is supplied.
2. At A128 code 1-4 according to how gas is paid for.
3. At A130 code 1-4 according to how electricity is paid for.

NB IN NORTHERN IRELAND ONLY A CODE 5 CAN BE ENTERED AT A130.

POINTS TO NOTE:

1. If two or more methods of payment are coded for gas enter code 4 at A128. Similarly for electricity at A130.
2. A board Budgeting scheme is one where the informant pays a regular amount to the gas/electricity board and settles up the balance of his account once a year.
3. Where an informant has a slot meter and a key with which to open it this should be treated as an account payment.
4. Where informant has a slot meter which is emptied by landlord treat as slot meter payments
5. Where a budget scheme is run by a local authority it should be treated as an account.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 55

SUBJECT: Gas and Electricity slot meter rebates and payments from rebates

REFER ALSO TO Q: 54

CODE:

1. At 173 code last gross rebate from gas meter
2. At 178 code last gross rebate from electricity meter

POINTS TO NOTE:

1. Installation charges are 'A' schedule items
2. Rebates at 173 and 178 should be the full rebate before any deductions for rental or maintenance
3. Where an informant has not put enough money into the meter to pay for the electricity or gas consumed, any balance paid in cash should be shown in 'D' schedule provided it was paid during record keeping.
4. If the informant is new to the accommodation and has not received a rebate then the last rebate received at previous address should be coded if given.
5. If last rebate is not known it should be imputed.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q: 56

SUBJECT. Gas and electricity paid for by account.

REFER ALSO TO Q. 54, 60 & 61

CODE.

1. At code 170 code last gas account payment
2. At 175 code last electricity account payment

For period codes, see Q.60.

POINTS TO NOTE.

1. If Q56 has been answered check that Qs 55, 57-59 have not been answered unless Q54 coded 4 because more than one method of payment used.
2. Where an informant has only recently moved to his present address it may be that no account has been received. In these circumstances the interviewer should have noted the last account paid at the previous address and this should be coded. If payment at the previous address was by slot meter, the interviewer should have obtained an estimate of the amount put in the slot meter, less the amount of rebate for a given period and this should be coded as the last account. If the informant has never had a supply of any kind before then an estimate should be coded.
3. Amounts at 170 and 175 should include non-standard items eg repairs, installations but not regular items such as maintenance (D schedule) or HP (Q69 etc).
4. Credits should not be accepted at this question, ie a payment or amount charged should have been recorded.
5. Where an informant is in credit and no amount has been entered at codes 170/175 an amount should be entered. The amount should be:
 - a. That stated in a note by the interviewer as being the amount that would have been paid if not in credit.or
 - b. An estimate from the tables supplied.
6. Where an informant is paying off an account by weekly or monthly payments this would be taken as last account payment.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 57-59

SUBJECT: Payments to Gas and Electricity Boards by households having Board Budgeting Scheme arrangements.

REFER ALSO TO Q: 54-56, 60 & 61

CODE:

1. At 221 code last payment under Gas Board Budgeting Scheme.
2. At 222 code last payment under Electricity Board Budgeting Scheme.
Period for codes 221 and 222 are given at Q58.
3. At 223 code amount shown on last gas account or advice.
4. At 224 code amount shown on last electricity account or advice.
Period for codes 223 and 224 are given at Q60.

POINTS TO NOTE:

1. The amount given at 221 or 222 can be smaller or larger than amounts given at 223 and 224 respectively.
2. If Qs 57-59 (coded 3 at Q54(a)) have been answered then Qs 60 and 61 should be answered. (Qs 55 and 56 should not be answered unless Q54(a) coded 4).
3. If the answer to Q57 is Don't Know impute payments on basis of Q59.
4. If the answer to Q59 is Don't Know impute payments on basis of Q57.
5. Credits should not be accepted at Q57 and 59 - see Q56.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 60 & 61

SUBJECT. Period covered by and date of last account/advice.

REFER ALSO TO Q: 56 & 59

CODE:

1. At A138 code date of last gas account/advice.
2. At A139 code date of last electricity account/advice.

POINTS TO NOTE:

1. The coding of the date of last account/advice should be according to standard frame at beginning of these instructions.
2. The period covered by account/advice at Q60 is used for coding purposes at Qs 56 and 59.
3. The date of last account/advice MUST be coded.

ADDITIONAL NOTES (give date and reference)

SUBJECT: Ownership and use of motor vehicles
Expenditure on vehicle licences and insurance

REFER ALSO TO Q: 65-67, 69-76. A Schedule, 16, 25 26-29, 35, 41 and 42 B Schedule

CODE:

1. At A124 code total number of cars and vans currently owned or available for continuous use (Q62).
2. At A160 code total number of CARS currently owned or available for continuous use (Q62).
3. At A162 code total number of motorcycles and mopeds currently owned or available for continuous use (Q62).
4. At 187 code total gross road fund licence paid in last 12 months (Q62 & 64).
5. At 188 code total net vehicle insurance paid in last 12 months (Q62 & 64).
6. At A149 code number of cars owned at Q62 (see below).
7. At A285 on front page of Income Schedule code provision of continuous use of car (Q62(g)).
8. At A286 on front page of Income Schedule code amount of petrol supplied for private motoring (Q63).
9. At 246 code amount of road fund tax actually paid on currently owned cars and vans before abatement.
10. At A143 code number of cars and vans currently owned (Q62).

POINTS TO NOTE:

N.B. Codes 246 and A143 are new for 1985. At code 246 enter the actual correct amount of road fund tax recorded as paid for currently owned cars and vans BEFORE ABATEMENT. At A143 enter the number of currently owned cars or vans. A143 should be equal to or less than A124.

1. A 'car' includes three wheel car and invalid car (ie conversion). An invalid tricycle should be treated as 'other vehicle'. A van includes lorry, land-rover, and jeep.
2. The gross amount of road fund licence is required at 187 and net amount of insurance at 188. This means that:
 - a. Where a refund of licence fee has been received this should NOT be deducted from licence fee at 187;
 - b. Where a refund of insurance has been received this SHOULD be deducted from insurance at 188.
3. The amount of road fund licence should be checked against lists provided before entry at 187. Insurance payments should be accepted as given (except for refund action).
4. Insurance against damage to a windscreen should be included in 188. As such insurance is often in the form of a separate policy from other car insurance, the premium may have been entered at Q47 in which case it should be deleted there and added onto the amount at code 188.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q: 62-64 (cont'd)

POINTS TO NOTE (CONT'D):

5. A car should be treated as owned if coded 0 at Q62(a) and provided that none of the following are refunded by employer at Q26 on the income schedule, a. Road fund tax, b. Vehicle insurance, c. Vehicle purchase, the number at A149 should equal or be less than the number at A160.
6. Disabled drivers can be exempted from payment of road fund tax.
7. If tax or insurance paid by an employer or someone else outside the household do not enter at 187 or 188.
8. Q62(g) refers only to cars for continuous use. Code on Income Schedule of spender concerned. If informant is not an employee refer budget to RO. If supplier is not an employee refer budget to RO.
9. Q63 applies to all cars. Code on Income Schedule for spender concerned. If informant or spouse not an employee refer budget.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 65

SUBJECT: Purchase of vehicles

REFER ALSO TO Q: 62-64, 69-76 A Schedule, and 16 B Schedule

CODE:

1. At 244 code net cost of new cars and vans acquired by cash.
2. At 245 code net cost of secondhand cars and vans acquired by cash.
3. At 247 code net cost of other new and secondhand vehicles acquired by cash.
4. At 181 code net cost of new vehicles acquired on credit (Q74 & 75).
5. At 182 code net cost of secondhand vehicles acquired on credit (Q74 & 75).
6. At A117 code total of new cars/vans acquired by cash or credit.
7. At A118 code total of secondhand cars/vans acquired by cash or credit.

POINTS TO NOTE:

Net cost of vehicle is cash price less trade in, part exchange, tax or insurance.

Vehicles bought by means of loan from bank or finance house, second mortgage, HP or credit sale (ie codes 1-4 at Qs 74-75) should not be entered at Q65. Other means of instalment buying eg. loan from friend or relative are acceptable.

A vehicle purchased by means of a loan from an employer (Q69 code 7) is acceptable at Q65 if the employer is someone to whom the general public CANNOT apply for a vehicle loan eg local authority. Enter net cost of vehicle at Q65 and delete details at Q69 and 74 etc.

Where the interviewer has not been able to give an amount for road tax but has noted that it is included in a purchase price given to Q65 and has given how many months the tax had to run at the date of purchase a proportionate amount should be transferred to code 187 (Q62 & 64). If the interviewer has not noted how many months the tax had to run the budget should be referred. Where an unknown amount of insurance has been included in the purchase price the budget should be referred.

Where instalments are being paid for the credit purchase of a car/van at Q74-75 and the car/van has been acquired in the 12 months before interview then the net cash price should be entered at 181 (new) or 182 (secondhand).

The total of cars/vans to be entered at A117 and A118 is the total of cars/vans acquired in previous 12 months by cash or credit.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 66

SUBJECT: Vehicles sold in last 12 months

REFER ALSO TO Q: 64

CODE: _____

At 172 code amount received for vehicle sold.

POINTS TO NOTE

This question applies to private vehicles sold. Vehicles sold as a business or in part exchange should be excluded.

Only monies received by cash, cheque or giro (Q66(b)) in twelve months before interview (See Q66(a)) should be coded at 172.

Where vehicle purchase price had been or would have been abated for business expenditure the sale price of vehicle should be abated.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 67

SUBJECT: Refund of vehicle licence fee

REFER ALSO TO Q: 62 & 64

CODE: _____

At 179 code total amount of refund a year.

POINTS TO NOTE:

1. Refunds at this question should EXCLUDE business refunds.
2. The refund should be accepted and coded without any referral.
3. Refund should not be deducted from licence fee at Q62 & 64 (code 188).
4. Refund should be abated for business expenses if necessary - see Q25, 26-29, 35, 41 & 42 'B' Schedule.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 68

SUBJECT: Season tickets for transport

REFER ALSO TO Q: 82

CODE:

1. For rail only season tickets (Excluding London Regional Transport enter code 219.
2. For combined rail/tube/bus season tickets (Including London Regional Transport) enter code 255 (see below).
3. For all other season tickets enter code 191

POINTS TO NOTE.

NOTE CHANGES FOR 1985

Include in 255 any of the following combinations

1. Rail/tube/bus
2. Rail/tube
3. Rail/bus
4. Tube/bus

Do not include single transport tickets at 255. Rail only should be coded 219. Tube only or bus only should be coded 191

There should be no duplication between Q's 68 and 82.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 69-73

SUBJECT: Types of credit arrangements.

REFER ALSO TO Q: 65, 74-76 & 78 'A' SCHEDULE, 16 'B' SCHEDULE

CODE:

N/A

POINTS TO NOTE:

The purpose of these questions is to establish what types of credit arrangements are being paid for.

For agreements coded 1-3 at Q69 full details should have been recorded at Q74.

For agreements coded 4 at Q70 full details should have been recorded at Q75.

For agreements coded 7 at Q69 full details should have been recorded at Q74 (SEE SPECIAL INSTRUCTIONS at A 74).

For agreements coded 6, 8-10, 12 & 13 at Q71 full details should have been recorded at Q76.

Where a credit card is held there should be a S835C sheet if account paid OR an entry on front of 'D' record stating that account not paid.

If Yes Y is coded at Q73 there should be an entry in next column at Qs 69-71.

There should only be one entry per column for Qs 69-73.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q. 74

SUBJECT. Credit arrangements coded 1-3 & 7 at 67

REFER ALSO TO Q. 65, 69, 75 & 78 'A' SCHEDULE, 16 'B' SCHEDULE

CODE: _____

N/A

POINTS TO NOTE.

The purpose of this question is to record information regarding loans in a way that is understood by informants. The data recorded is transferred as detailed below.

Agreements coded 1-3 at Q69. Transfer data directly to 75.

Agreements coded 7 at Q69: Where the employer is an organisation that grants credit direct to the public eg bank, finance house, as a normal part of its business, transfer data to Q75 BUT AMEND Q69 CODE FROM 7 TO 1-3 as appropriate. If the employer is one that does not grant credit to the public as part of its business, do not transfer data unless the loan is for a vehicle. Where the loan is for a vehicle and the loan was obtained within twelve months of the date of interview then code the cash price of vehicle at Q65, the cash price being as specified at Q65, delete entry at Q74.

NB. Where a loan is for a season ticket enter the cash price of ticket at Q68. and delete at Q74.

NB. When transferring data to Q75, the date loan was obtained becomes date item was obtained.

ADDITIONAL NOTES (give date and reference)

175

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 75

SUBJECT: Credit arrangements coded 4 at Q70. Items transferred from Q74

REFER ALSO TO Q: 69 - 73, 74, 76 & 78 "A" Schedule & 16 "B" Schedule

CODE:

1. At 239-1 code cash price of item being purchased
2. At (e) enter in OFFICE USE box the item code and period code for the last instalment.
3. At 241-6 enter the amount allowed in part exchange
4. At 242-6 enter amount of downpayment EXCLUDING part EXCHANGE
5. At A101 enter number of agreed instalments
6. At 243 enter amount and period of originally agreed instalment

POINTS TO NOTE:

These notes refer to entries entered directly by interviewers or transferred by PAB staff.

1. Ensure that correct reference number has been entered at top of page.
2. Ensure that correct person numbers and codes from Q68 have been entered at top of each column.
3. Interviewers or you should have entered each item in a separate column. If items in different columns are covered by a combined instalment the instalment should have been entered in the first related column and C.I. written in the remainder of columns. The instalment should be apportioned between columns on basis of cash prices.
4. Where two or more items are entered in a column no action is required if they all have the same item code. If there are different item codes, enter items with differing item codes in separate columns and apportion instalments, down payments, etc, on basis of cash prices.
5. The item and type of firm should be used to check entries in record books: such entries should be deleted from record books.
6. Use date at (g) to check whether items were obtained within three months of interview. If obtained more than three months prior to interview then (h)-(l) should be blank.
7. Car leasing is to be treated as car hiring and not car purchase on credit.
8. Where a loan has been transferred from Q74 ensure that a check of the cash price plus part exchange and down payment accounts for the total amount of the loan.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q. 76

SUBJECT. Credit arrangements coded 6, 8-10, 12 & 13 at 71

REFER ALSO TO Q:

CODE:

N/A

POINTS TO NOTE:

1. Check that correct reference number has been entered at top of page.
2. Check that correct person number and code from Q71 has been entered at top of each column.
3. Use date given to check that items were obtained on or after a date exactly one CALENDAR month before date of interview. Items acquired more than a calendar month before interview should be deleted as should items obtained ON date of interview.
4. Use normal record book item codes for coding items entered in grid.
5. Use the following alpha codes for coding type of arrangements.

(6) Budget or option account	C
(8) Other shop running a club	E
(9) Mail order club as agent or through friend or relative	F
(10) Any other Mail Order organisation	G
(12) Check trader	J
(13) Any other arrangement	K
6. The item, and name of firm should be used to check entries in record books: such entries should be deleted from record books.
7. Some budget or option accounts now cover several shops in some chains eg Readycredit is in Rymans, Top Shops and Burtons.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 77

SUBJECT: Domestic bank charges

REFER ALSO TO Q:

CODE:

At 180 code total amount of DOMESTIC bank charges in previous 12 months.

POINTS TO NOTE:

1. High street banks refer to normal banks of a local nature eg Barclays, Lloyds, Midlands, National Westminster, Williams and Glynns, Yorkshire, Clydsdale, Royal Bank of Scotland, Bank of Scotland, Co-operative, Trustee Savings Bank.
2. The total amount of bank charges should be coded at 180.
3. If the amount of bank charges recorded by interviewer includes a business element (see 77(ai)) this should be removed before amount is entered at code 180.
4. Deposit accounts should not be accepted at this question. Income from these is shown in 'B' schedule Q72, Q73.
5. This question should exclude interest on loans or bank budget accounts.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE A

Q: 78

SUBJECT: Items not already covered by 'A' schedule questions, paid for by standing order, or direct debit, through a bank or National (Post Office) Giro account. Bank budget account or building society which is not allocated a code elsewhere on A schedule.

REFER ALSO TO Q:

CODE:

The codes to use are described below. NB From 1984 fewer items should appear at this question because interviewers will not have entered previously mentioned 'A' schedule items here.

POINTS TO NOTE:

Where an item paid for by standing order, direct debit, bank budget account or Secure Homes, etc, should appear elsewhere on the schedule (eg. insurance premium, mortgage interest, oil for central heating), the item should be deleted from Q78 and transferred to the appropriate question if it is not already entered there. On the other hand, where a payment in the record book is made under a standing order, direct debit or bank budget account listed at Q78 it should be deleted from the record book. It may happen that an item paid by standing order, direct debit or bank budget account is entered in the record book but not on the A schedule at Q78 (this would occur if the order were only signed during the record keeping period). In these cases the entry should be deleted from the D book, if it is indicated that the payment is by standing order, direct debit or bank budget account but no entry should be made at Q76 on the A schedule.

Building societies can pay bills by standing order but the number of cases is very small.

Service charge made by Secure Homes etc should be coded at Q69 as well as interest on bank budget account.

Item code for Bankers' order etc

Description

270

A.A. and R.A.C. subscriptions - coverage identical with code 546 in record book.

271

Subscriptions to sports clubs - coverage identical with code 764 in record book.

273

Subscriptions to Trade Unions, professional associations - coverage identical with code 796 in record book.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 78 (cont'd)

POINTS TO NOTE (CONT'D):

- 274 Subscriptions to periodicals, magazines - coverage identical with code 723 in record book.
- 275 Other subscriptions - coverage identical with code 797 in record book.
- 276 Savings - coverage identical with code 803 in record book.
- 278 Monetary gifts - coverage identical with code 802 in record book.
- 279 Charitable gifts - coverage identical with code 798 in record book.
- 280
1. Fuel oil not for central heating - coverage identical with code 261 in record book.
 2. Maintenance charges.
 3. Any other items not covered by the above.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q: 79

SUBJECT Items free on prescription

REFER ALSO TO Q.

CODE:

At A198 code total number of items obtained free on prescription during the past seven days.

POINTS TO NOTE:

No referrals will be made back to informant.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 80

SUBJECT: Free liquid welfare and school milk and free school milk

REFER ALSO TO Q: Q4 and 6.

CODE:

1. At 263 enter the total imputed value of free liquid welfare milk obtained in past seven days.
2. At 259 enter the total imputed value of free school milk obtained in past seven days.

POINTS TO NOTE:

1. Free liquid welfare milk

Free milk is available for

- a. Expectant mothers and all children under school age in families in receipt of supplementary benefits, family income supplement or in special need because of low income.
- b. An expectant mother who already has two children under school age, regardless of family income.
- c. All but the first two children under school age in families with three or more children under school age, regardless of family income.
- d. Handicapped children aged 5 to 16 who are not attending an educational establishment.

2. Free School Milk

Every child up to the summer holiday following their 7th birthday (11th in some L.E.A.'s) at a registered day nursey, playgroup, or with an approved child minder or at a state primary school, is entitled to one third of a pint of milk per day free of charge. It is possible in certain circumstances for children up to school leaving age (i.e. - sometime between their 16th - 17th birthday) to obtain free milk. It is also possible for some children to get more than one third of a pint.

After checking for consistency with the household box, calculate the total imputed value of the school milk taken in the lat 7 days and enter this at code 259.

IMPUTED VALUES are at current market values.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q. 81

SUBJECT: School meals at State schools

REFER ALSO TO Q: Q5 and 7

CODE: _____

1. At 260 enter the total amount paid by informants for school meals in past seven days.
2. At A196 code number of paid school meals had in past seven days.
3. At A197 code number of free school meals had in past seven days.

POINTS TO NOTE:

In certain cases school meals may be free. When such cases arise leave code 260 blank. The number of such meals will be recorded at code A197.

This question refers only to children at state schools. All other meals at school (eg staff meals) are meals out and should be coded in the D records (if the informants have entered them there). Free staff meals should be entered at Q30 'B' Schedule.

Note that amount paid in last 7 days is required at 260 regardless of period covered by payment.

Meals obtained from school cafeteria should be included at this question. Food obtained from school tuck shop that is run by student or parents organisation should be excluded.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 82

SUBJECT: Travel to state schools

REFER ALSO TO Q: 6 & 68

CODE: _____

1. at A157 code '1' if free, code '2' if paid for, '3' if some free and some paid.
2. at 158 code amount paid in last 7 days.
3. at A167 code total number of children travelling to state school.

POINTS TO NOTE:

Only children travelling to state schools should be entered at this question.

Where one child in family travels to school without payment then all children in family normally travel without payment if at same school or a school a similar distance from home.

Note that amount paid in last 7 days is required at 158 regardless of period covered by payment.

There should be no duplication between Q82 and Q68.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 83

SUBJECT. Educational grants received

REFER ALSO TO Q: 6, 84-87 'A' schedule. Code 361, 392, and A252 'B' schedule.

CODE.

1. At 210 enter current annual value of grants currently being received from state.
2. At 209 enter current annual value of grants currently being received from non-state source.
3. At 207 enter amount of current grant being received by cash or cheque.
4. At 361 (income schedule) code the annual difference between 209/210 and 207 (for spenders page 37, for under 16 page 39).
5. At 392 (income schedule) code annual amount of grant at 209 and 210 (for spenders page 37, for under 16 page 39).
6. At A252 code level, source of grant and establishment. See instructions on income schedule.

POINTS TO NOTE.

This question relates to spenders and any children aged under 16.

The amount shown at 210 is for state grants currently being received and therefore excludes fees which are paid direct to educational establishment by state.

The amount shown at 209 is for grants currently received from overseas states and private sources in U.K. or overseas. These grants include fees.

The amount at 207 is the annual amount of current grant received by cheque or cash.

Any state grant received in past twelve months but not currently being received should not be entered at 210.

Amounts shown at 210 or 209 should be shown on income schedule at 392 and source, level and establishment coded at A252 (see notes on income schedule).

ADDITIONAL NOTES (give date and reference)

185

POINTS TO NOTE:

Courses up to and including 'A' level include:

Ordinary National Diploma
Ordinary National Certificate
Technical Education Council) ordinary or general
Business Education Council) courses
(including Scottish T.E.C. or B.E.C.)
City and Guilds
General Certificate of Education 'O' & 'A' levels
Scottish Certificate of Education
Certificate of Secondary Education (CSE)
Certificate of Extended Education (CEE)

Courses above 'A' level include:

Teacher Training
Degrees
Higher National Certificate
Higher National Diploma
TEC, BEC, SCOT.TEC, SCOT. BEC - Higher courses
Diploma in Higher Education

ADDITIONAL NOTES (give date and reference)

SUBJECT Educational fees paid for people in household

REFER ALSO TO Q: 6, 83, 85-92. Page 36 (coding frame).

CODE.

1. At 160 code fees paid in last twelve months for educational course.
2. At A193 code 1-7 as detailed below.
3. At 162 code fees paid in last twelve months for 'other' course.
4. At A195 code 1-7 as detailed below.
5. Code page 36

POINTS TO NOTE.

Codes 160 & 162, A193 & A195 are concerned with spenders own courses and courses for children aged under 16.

Codes to be used at A193 and A195.

Courses at State establishment	1
" " Private " 	2
" by Individual	3
" at State and Private establishment	4
" at State establishment and by individual	5
" at Private establishment and by individual ..	6
" at State and private and by individual	7

Where an employee has their own fees partly refunded by an employer the fee paid should be abated by amount of refund. Where an employee has their dependents fees refunded by an employer fees should be treated as private expenditure ie amount refunded is added to income and amount of expenditure coded as such.

NEW FOR 1985 (Q84 (a))

If a person is currently attending the course, Yes ... Y at 84(a) (vi), code as follows on page 36.

1. Person number
2. Amount at 84 (a)(ii)
3. Type of establishment and course at 84 (a) (iii) and (iv) using the following frame

State establishment	:	'A' level or below	-	1
" "	:	Above 'A' lev-1	-	2
" "	:	DK/Other	-	3
Private establishment	:	'A' level or below	-	4
" "	:	Above 'A' level	-	5
" "	:	DK/other.....	-	6

NEW FOR 1985 (Q84 (b))

If a person is currently attending the course, Yes Y at 84 (b)(v), code the person number, amount at 84 (b)(ii) and code at 84 (b)(iii) on page 36

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 85

SUBJECT: Part-time courses at state establishment where no fees are paid

REFER ALSO TO Q: Page 36

CODE:

Page 36

POINTS TO NOTE:-

This question is new for 1985, and is asked of spenders only. Parts (a), (b) and (c) should have been answered if Q85 answered 'yes'. Transfer person number and code at 85(b) to page 36

ALTHOUGH DATA ON THIS QUESTION IS NOT PUNCHED IT SHOULD BE FULLY CHECKED BEFORE TRANSFER TO PAGE 36

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 86

SUBJECT: Attendance at courses under the TECHNICAL AND VOCATIONAL EDUCATIONAL INITIATIVE

REFER ALSO TO Q: 6 and page 36

CODE:

Page 36

POINTS TO NOTE:

This question is new for 1985. It is asked only of those aged 14-18 years of age who are coded 4 or 9 at Q6

Technical and Vocational Education Initiative is a scheme whereby children in the age groups 14-18 can have their education so designed that it includes trade and business related elements. This helps them prepare for work on leaving school. It is currently available in 50% of educational authority areas.

The person number and code at the question should be transferred to page 36

There is no reference back on this question

ALTHOUGH DATA ON THIS QUESTION IS NOT PUNCHED IT SHOULD BE FULLY CHECKED BEFORE TRANSFER TO PAGE 36

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 87-91

SUBJECT: Grants for children aged 16 to 24 who are not household members.

REFER ALSO TO Q: 83-86 & 92

CODE: _____

No coding action required but normal checks for consistency must be made.

POINTS TO NOTE:

Data collected at these questions is to be hand tabulated by household reference number and parent/guardian person number.

Tabulated data to be passed to Dept. of Education and Science for analysis with data collected on rest of schedules.

Tabulation will be by FES Research Unit on receipt of pages 35 and 36 from P.A.B.

There is no reference back to informant on these questions.

Full or part time will depend upon informants registration status at the educational establishments.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. A

Q: 92 & CODE 164(P37)
Grid for Q84-86

SUBJECT: Educational fees paid for children aged 16 to 24 who are not household members or any other non-household member.

REFER ALSO TO Q: 83-91

CODE.

At code 164 (page 37) enter the total amount of fees in last twelve months entered at (a) (1).

POINTS TO NOTE:

In addition to coding expenditure at code 164 the data at Q92 is to be tabulated with that for Q87-91 and forwarded to the Dept. of Education and Science for analysis.

Full consistency checks are to be made.

There is no reference back to informant on this question.

GRID AT FOOT OF PAGE 36

This is new for 1985. Details regarding its completion are recorded at notes on Q84-86

A line must be drawn through the box if there is no data to be transferred from Q84-86. Where there is no entry or line, Research Branch will return the page to PAB for completion.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 93

SUBJECT: Type of accommodation occupied by household

REFER ALSO TO Q: 97

CODE: _____

1. At A123 code the type of accommodation as recorded by interviewer.

POINTS TO NOTE:

Ensure that at least one code is ringed.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE A

Q 94

SUBJECT: Other rooms in the Rateable Unit not covered by Q13 or 14.

REFER ALSO TO Q: 11, 12, 13, 18 - 30, 96 & 97 'A' Schedule. 26 & 41
B Schedule

CODE: _____

NO CODING ACTION REQUIRED

POINTS TO NOTE:

The answer to this question should be used when appropriate in apportioning the rateable value shown at Q96 between business element and private element and between household units occupying the same rateable unit. The rules for apportioning the rateable value are given in the notes covering Q96 A Schedule and Qs 26, 36 & 41 B Schedule.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: 95-97

SUBJECT: Rateable Value and description of property

REFER ALSO TO Q: 12, 13, 14, 18 - 30, 94

CODE:

1. At 070 code the Net Rateable Value of the rateable unit(s) covering the household.

POINTS TO NOTE:

Interviewers will have entered the net rateable value at code 070. However, this may have to be abated at the coding stage for one of two reasons.

1. Other households occupy the rating unit: at the coding stage only part of the total rateable value should be accepted at Q96 for each household. The proportion of the total rateable value accepted at Q96 should be the same as the proportion of the rooms in the rating unit occupied by the household.

The number of rooms in the rating unit is counted as the total number of "left-hand box" rooms plus bathrooms, garages and rooms used entirely for business (but not rooms listed under "other-specify") owned or occupied by the households interviewed, plus any other rooms in the rating unit (the number of these can be worked out from the answers to Q94).

The number of rooms occupied by the individual household is the number of rooms (that is "left-hand box" rooms, bathrooms, garages and rooms used entirely for business, but not rooms listed under "other-specify") that are occupied solely by that household plus a proportion of those it shares.

This calculation should be done after it has been decided whether rooms entered as "other-specify" count as any of the other types of rooms and after any alteration to the garage entry at Q12 or 13 and the RV at Q96 because of the information at Q14. A check should be made that the information at Qs 12, 13 and 94 for all households interviewed at the address is consistent. Where all the households in the rateable unit have been interviewed the abated rateable values should combine to the total rateable value for the unit, otherwise the abated rateable values of the interviewed households will combine to less than the total rateable value for the unit.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

2. Part of the rating unit is used for business purposes: in this case the rateable value should be abated in the same proportion as rates payments or rent payments including rates at Qs18-30(except for farms on which a 100% claim is noted at Q41 B Schedule on rent, mortgage, rates, etc - in which case the RV is abated by 1/3rd). The rules for abatement are given in the notes covering Qs 26 and 41 B Schedule .

Further Points:

A. On occasions it will not have been possible for interviewer or research to establish a rateable vaue (eg some crown land property, newly constructed property not yet assessed). In such cases where there is no more satisfactory method of estimation, rateable value should be calculated at the rate of £40 per room occupied by the household taking into account "right-hand box" rooms.

The rateable value of a caravan should be calculated in the following way. Total rateable value of site divided by number of caravans. The maximum rateable value of a caravan is £25. If rateable value of site is unknown then a notional value of £25 should be entered.

B. The Gross Value is entered at Q95 for editing purposes and must be more than Net Rateable Value (see notes at Q41 B schedule).

Because queries arising on rateable values and decription of property, etc. normally require contact with local authorities or water authorities it is essential that queries for one area should be dealt with together. This will not only mean that a more economical use of time is made but also that relationship with local bodies is kept on a good footing. It may also mean that when several queries are brought together an answer may be found to the query without reference to local body (ie information on one schedule may provide a clue to queries on other schedules).

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

C. Check that the description of the property has been given at Q.97.

The description should be consistent with any information recorded elsewhere, the greatest inconsistency will be found with garages.

1. If after coding Q14, a garage is entered at code A 115 but no payment for it is shown at code 189, the NRV at Q96 code 070 should include the garage.

a. If the description from the valuation list does not include a garage, and if it is noted that there is a separately rated garage, as well as the property described on the valuation list, the rateable value of the garage should be added to the amount at 070. (A check should be made that any rates payment at Qn.24 agrees with this adjusted RV).

b. If it is not specifically noted that there is a separately rated garage, it should be assumed that the RV at 070 covers the garage.

2. If after coding Q14 a garage is recorded at 115 and an amount is coded at 189, the RV at code 070 should NOT cover the garage. If the description at Q97 includes a garage the budget should be queried.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q. 98

SUBJECT OAP CONCESSIONARY BUS TRAVEL PROVIDED IN HOUSEHOLD'S AREA

REFER ALSO TO Q "B" SCHEDULE Q 84

CODE

1. At A129 code type of concessionary bus travel provision.
2. At 163-8 code annual value of tokens/tickets coded 4 at A129.

POINTS TO NOTE:

This question should only be coded IF THERE IS A HOUSEHOLD MEMBER AGED 65 AND OVER IF A MAN, AND 60 AND OVER IF A WOMAN. (Over 65 for men and women in N. Ireland).

Code

1. Free bus pass or permit. This means that informant does not pay a fare when travelling.
2. Half fare bus pass or permit. This means that informant pays half fare when travelling.
3. Flat fare bus pass or permit. This means that informant pays a flat or standard rate per trip when travelling within a specified distance.
4. Bus tokens or bus tickets. These occur when informant receives tokens or tickets with a face value (eg £10.00 per year) and gives these up when travelling eg similar to luncheon voucher.
5. Any other type of concessionary OAP bus pass.

Normally if this question is answered then Q84 in 'B' schedule will be answered. If this question is answered and Q84 'B' schedule answered No or DK this may be accepted. If this question is not answered but Q84 'B' schedule is answered Yes, then omission should be referred to supervisor.

This question can have been used to prompt Q82 on income schedule.

ADDITIONAL NOTES (give date and reference)

FES. JAN 85

SCHEDULE: A

Q: 99

SUBJECT: Background information

REFER ALSO TO Q:

CODE:

N/A

POINTS TO NOTE:

This question is for information only.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Code 267 p 39

SUBJECT. Certain types of "hidden" income from self-employment

REFER ALSO TO Q: 41 'B' schedule

CODE.

N/A

POINTS TO NOTE:

See the notes on Q41 'B' schedule

N.B. Referred to as expenditure on base tape. This data used by CSO.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: Code A174 (p39)

SUBJECT: Imputed expenditure

REFER ALSO TO Q: 'A' Schedule expenditure questions

CODE: _____

At A174 code 1 if any expenditure has been imputed.

POINTS TO NOTE:

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: A

Q: Page 40 (Office Use)

SUBJECT: Domestic, water, sewerage and environmental rate poundages

REFER ALSO TO Q: 25 and rates poundages list supplied by Research

CODE:

1. At 080 code yearly domestic rate poundage.
 2. At 231 code yearly water rate poundage.
 3. At 234 code annual standing charge for water.
 4. At 232 code yearly sewerage rate poundage (England and Wales only).
 5. At 235 code annual standing charge for sewerage service (E. & W. only).
 6. AT 233 code yearly environmental rate poundage (England and Wales only).
-

POINTS TO NOTE:

Entries made by P.A.B. from list supplied by Research.

1. All poundages coded must be exclusive ie
 - a. Domestic poundage must not include water, sewerage, environmental poundages (see Scotland below)
 - b. Water poundage must not include sewerage or environmental poundages
 - c. Sewerage poundage must not include environmental poundage
 2. All poundages must be yearly.
 3. Where accommodation is not connected to mains sewerage (Q 25) do not enter sewerage rate poundage or standing charge. Environmental poundage etc should be entered.
 4. In Scotland there is no environmental or sewerage rate.
 5. Standing charge (or fixed charge) is a flat payment in addition to payment based on poundage.
-

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

7. Minimum charge is the lowest charge that can be made on household, normally at or just above standing charge.
8. Round poundages to nearest 1/2 p.

ADDITIONAL NOTES (give date and reference)

'B' SCHEDULE CODING NOTESTHESE MUST BE READ IN CONJUNCTION WITH INTERVIEWER INSTRUCTIONSGeneral

The layout of the Income schedule is designed to record details for two persons on the same schedule. It is, therefore, important that details related to the specific person should be identified and coded separately. Extreme care should be taken to enter the person number(s) at the head of the coding columns at the right hand side of each page; and information coded in these columns should be related to the right person.

Interviewers have been instructed to follow the same order of person numbering throughout the schedule. In coding operations the same order of person numbers should be maintained while recording person numbers at the head of the coding columns at the right hand side of each page. For example, if on page one person 1 has been entered at the head of the 1st tabular type answer box and at the head of the first coding column, and person 2 at the head of the second column in both sets of columns, then person 1 should always be entered at the head of the first column in the rest of the schedule. You should be very careful on those pages where details for only one person are recorded. For example, if person 1 is retired and person 2 is an employee then, on pages 2 and 3, details will only be given for 2 and care should be taken to enter details for person 2 in the second column all through, if person 1 has been entered in the first column of page 1.

It is most important that person numbers at the head of coding columns on each page containing information to be punched correspond with the appropriate information, and person numbers recorded in the body of the form where answers have been recorded.

Interviewers have been instructed to enter both husband and wife on the same income schedule when they are both members of the households. So it is necessary to check whether the husband and wife are on the same B schedule. A check should also be made that the correct Area, Serial and Household numbers have been entered in the appropriate spaces in the top right hand corner of page 1.

Joint incomes should be divided between the recipients on the basis of equal shares unless the interviewer has indicated that a different arrangement exists. State benefits should not be divided as these are paid to recipient, and non-recipient (eg child) is considered a dependent.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 1

SUBJECT: Employment status. This question is also a very important signposting question, its answer decides which part of the schedule will be asked during the interview.

REFER ALSO TO Q: 8-41, 86

CODE: _____

At A201 enter code ringed in column

(For codes A285 and A286 see Q62(g) and Q64 on household schedule).

POINTS TO NOTE:

In general the code ringed by the interviewer can be accepted. However, occasionally it will need to be amended for one of the following reasons.

1. Because when a person has two (or more) jobs, it is the most remunerative one which should govern whether he is coded as an employee or self-employed at Q1. In these cases the informant might state his most remunerative job to be that which he considers to be his "main" job or "usual" occupation; if an examination of the schedule shows his other job to be the more remunerative then Q1 should be coded in accordance with his status in this other job. This will also entail recoding the questions governed by the signposting at Q1.

2. Because an informant may answer that he is out of work or retired, because this is the situation pertaining to what he considers to be his "main" job. However, if it is apparent from other questions on the schedule that he has some job at which he is currently working, then Q1 should be coded 1 or 2 depending on whether he is an employee or self-employed. The questions governed by the signposting at Q1 will also need to be recoded.

For example it may happen that a person who said initially that he had no job reports at Q86 a job he currently holds. In this case the coding at Q1 will have to be amended and details of the job must be entered at either Qs 9 to 30 or Qs 9, 36 to 41 as appropriate.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D).

Note that if the code at Q1 etc. has to be altered because of an entry at Q86 the budget should always be referred to the supervisor (see the notes on Q86).

3. Because the coding of the informant's status conflicts with the following definitions:

- a. At present means at the time of interview.
- b. Employee: there are two basic problems in deciding whether someone is an employee:
 - i. Is he/she an employee as opposed to not working?
 - ii. Is he/she an employee as opposed to being self-employed?

This section deals with the definition of "employee" problem (i). Problem (ii) is dealt with in section (c) after the definition of self-employed.

An "EMPLOYEE" is someone who at the time of interview has an arrangement with an employer (another person or an organisation) to work for the latter for a wage or salary. (see below)

This definition does not incorporate a time limit, so it applies irrespective of the interval between the time of interview and the date when the informant next begins to work. It therefore includes anyone on holiday, on strike or locked out or unable to work through illness or injury as long as he has job to return to.

The definition applies regardless of the number of hours worked per week.

It does not apply where employment has been terminated before or immediately before time of interview.

Someone who is unemployed at time of the interview and who has an arrangement to start work with an employer IS NOT AN EMPLOYEE but should be coded 3 or 4.

Casual or seasonal workers - should be coded as employees if on the day of interview they are working for an employer. If on an employers books but not working they should be coded 3 or 4, ie. not employed. (This mainly applies to occupations like market research interviewers and agricultural workers etc).

People with a regular but intermittent arrangement to work for the same employer (such as many school kitchen staff) should be coded as employees even during the periods they are not working.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

Working students - such as sandwich course students, should be coded at Q1 according to the situation at the time of interview - ie if working they should be coded as "employees", if at college and not receiving a wage/salary they should be coded as "none of these". However if a student is attending college at the time of interview but is also being paid a wage/salary he should be coded as an employee at Q1 although he will be shown as a student on the front page of the A schedule.

Resident Employees - Au pairs and domestics who are members of the household should be classified as working the same way as any other employee even though in this situation payment is made from one member of the household to another. The HOH's record books should show the wages paid as a expenditure item - code 771.

Shop Assistants - Shop assistants, including demonstrators should be treated as employees.

Government Financed Trainees receiving a wage - Where an informant is employed by private concern, charity, etc, under a Manpower Services Commission scheme AND is paid local wage rates he/she is an employee. At time of writing this would include people on the Community Programme.

Government Financed Training receiving an allowance - Where an informant receives an allowance instead of a wage they are to be treated as unemployed. This would include Youth Training Scheme (GB), Youth Training Programme (NI).

Employment outside the United Kingdom (Paid in UK or Non-UK currency) - Code as 'None of these' (see Q80 and 86).

Employment in United Kingdom (Paid in Non-UK currency) - Code as employee (see Q11).

c. SELF-EMPLOYED: in general someone is self-employed if they work on their own account instead of drawing a wage/salary from an employer. Also included are people who are temporarily sick but would be working at a self-employed job if they were well.

As in the case of employees people can be accepted as self-employed regardless of number of hours worked per week.

In general an individual's own assessment of whether he is self-employed or an employee should be accepted. However the following are some specific points:

1. The sole owner or part-owner of a business, a partner in business or private practice, a director receiving fees only, would all be self-employed. However someone working for a private (or public) company as a working director or a manager is an employee. In this case the salary he draws should be entered at the questions on income from employment; any dividends he received should be entered at Q77, any undistributed profits of the company should not be entered at all since they are not part of his income.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

ii. Mail order agents and baby sitters are not to be considered self-employed: see Q85.

iii. Child minders are treated as self-employed.

iv. Home-workers are assumed to be employees.

v. Clergy:-

In general treat as below but there may be some exceptions to rules eg. where a Church of England curate is considered to be an employee he should be accepted as such.

1. Roman Catholic Priest - Budget to be referred to supervisor (although these will normally have been rejected at the field stage as being unsuitable because of house-keeping arrangements).

2. Church of England Clergy - Treat as employees.

3. Non-conformist Ministers - Treat as employees.

4. Jehovahs Witnesses - Treat as self-employed.

vi. Local authority elected members:-

Local authority councillors should be treated as self-employed.

d. "Out of employment but seeking work or about to start work" - this classification should include informants who do not at the time of interview have an arrangement with an employer to work for a wage or salary but who are seeking work (whether or not they have worked before, eg school leavers). It also includes informants who are unemployed but have an arrangement to start work for wage or salary (whether or not they have worked before, eg school leavers).

The definition 'seeking work' coincides with the standard Social Survey definition ie registered at an employment exchange or other employment agency, answering advertisements or advertising for a job.

Government financed trainees receiving an allowance are classified as unemployed. This includes an allowance received from the UK government or EEC funds.

Include as unemployed informants who are currently unemployed but whose last job was abroad (see Q11).

e. "Out of employment because of sickness or injury but intending to seek work or about to start work" - this classification applies to informants who are actually sick or injured at time of interview and have been so for up to five years. If informant has been out of work because of sickness or injury for more than five years, he should be recoded as sick or injured but not intending to seek work.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

f. "Sick or injured but NOT intending to seek work" - this classification includes those who do not intend to seek work and those who have been unemployed because of sickness or injury for more than five years.

g. "Retired". It is difficult to provide a precise definition of who is to be included in this category. In general the informant's word should be accepted; however it should be born in mind that the intention is to include only those who at the time of interview, have retired from their full-time occupation, are of the approximate retirement age for that occupation and are not seeking further employment of any kind. Thus women who at a comparatively early age cease work to become housewives are precluded from this category.

An informant receiving unemployment pay or an informant who has volunteered the information that he/she left their employment early on a voluntary basis to obtain early private pension is to be treated as unemployed. (NB. it is possible to receive unemployment pay after retirement age if 'retirement' has been waived).

An informant who has left work early on a Government Job Release scheme should be treated as retired.

Where an informant is considered not to be retired, coding throughout schedule should be amended accordingly.

h. "None of these" includes:

- i. all persons never in employment and not seeking employment;
- ii. persons of independent means;
- iii. women engaged in unpaid domestic duties (even if they had paid work at some time).
- iv. continuing students over 16 who are not employed at the time of interview unless receiving a wage (see employees).
- v. persons out of employment for more than five years and not retired, sick or injured even though they claim to be seeking or intending to seek work.
- vi. an informant working overseas and receiving wage or salary in a currency other than the United Kingdoms.
- vii. Prisoners.
- viii. Informant's working abroad (paid in UK or Non-UK currency) - see also Q11, 78 and 84.

CODES A285 and A286 are coded from Qs 62(g) and 64 on household schedule.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. B

Q: 2

SUBJECT: Number of weeks regular paid work in last 12 months

REFER ALSO TO Q: 1(a)

CODE: _____

At A215 code number of weeks.

POINTS TO NOTE:

This question applies to those coded 1 or 2 at Q 1(a).

The number of weeks should include paid holidays, paid sick leave, statutory sick pay. The number of weeks should exclude weeks on strike.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 3

SUBJECT: Absence from work: more than last three working days: reason and pay
- employees.

REFER ALSO TO Q: 1(a), 2

CODE:

At A207 code reason for absence.

At A209 code whether full pay, part pay or made up pay, or no pay received.

At A208 code number of weeks (currently) away from work.

POINTS TO NOTE:

Where a person has been absent from work for more than the last 3 working days for any reason other than unemployment, the appropriate code 1, 2, 3 or 4 should be entered at A207. If the reason for absence is "other" the reason should be examined to see if it should be more appropriately coded 1-3. (Code 3 "strike" includes a strike in which the informant takes part and occasions where he/she is unable to work because of a strike by others).

At Q2(a) (ii) the appropriate code 1, 2 or 3 should be transferred to code A209.

At code A208 the interviewer will have entered the number of weeks that the informant has been currently away from work. A week is intended to mean 4-7 days. However, if question is answered because the informant is unemployed (ie. shown at Q1) then the first week away from work (ie. a "1" at code A208) includes anything from 1 day to 10 days.

NB. If a person has been away from work for reasons other than sickness or injury for more than 260 weeks he is to be coded "None of these" at Q1.

If a person has been away from work because of sickness or injury for more than 5 years (260 weeks) he should be coded as "Sick or injured but not intending to seek more work" at Q1.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 4

SUBJECT. Number of weeks away from work - unemployed

REFER ALSO TO Q. 1, 55, 57

CODE.

At A208 code number of weeks (currently) away from work.
At A215 code number of weeks paid work in last 12 months.

POINTS TO NOTE.

This question excludes students and school leavers yet to start their first job.

At code A208 the interviewer will have entered the number of weeks that the informant has been away from work. A week is intended to mean 4-7 days. However, if question is answered because the informant is unemployed (ie. shown at Q1) then the first week away from work (ie a "1" at code A208) includes anything from 1 day to 10 days.

The weeks entered here should include time on government training schemes if allowance received or weeks in rehabilitation units.

NB. If a person has been away from work for reasons other than sickness or injury for more than 260 weeks he is to be coded "None of these" at Q1.

If a person has been away from work because of sickness or injury for more than 5 years (260 weeks) he should be coded as "Sick or injured but not intending to seek more work" at Q1.

Q4 (a) which is asked of those who have been unemployed for less than 52 weeks.

At 4 (a) the number of weeks should include weeks on paid holiday, paid sick leave, statutory sick pay but exclude weeks on strike.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 5

SUBJECT: Informants coded as retired (6) at Q1.

REFER ALSO TO Q: Q1, 45, 60, 65 and 'A' Schedule front page.

CODE:

1. At A206 code number of weeks since retired, provided less than two years (ie 1-103 weeks).
2. At 302 code income in year prior to retirement, provided that retired in last two years.

POINTS TO NOTE:

RETIRED:

In calculating weeks, 3 or less days should be ignored but 4-6 days counted as full week. However if person retired WITHIN the last 3 days treat as one week.

A D.K. can be accepted and no entry made at 302.

A retired person will normally be receiving a retirement pension (Q45) or Supplementary Pension (Q60) or other state benefit (Q65).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 6-8

SUBJECT: DETAILS OF LAST JOB FOR THOSE WHO HAVE WORKED IN LAST 12 MONTHS

REFER ALSO TO Q

CODE

POINTS TO NOTE

For those answering yes at Q8 and giving a number of weeks at 8(a) then Qs 8(b) & (c) should be answered.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 6

SUBJECT: Informants currently 'None of these' or 'sick or injured' not intending to seek work who are looking after a sick or aged relative.

REFER ALSO TO Q: 1

CODE:

At A217 code 1 if looking after a sick or aged relative and '2' if not looking after a sick or aged relative.

POINTS TO NOTE:

Asked only if men under 65 and women under 60 coded 5 or 7 at 1(b).

A relative for the purpose of this question is a legal or blood relative eg. husband and wife, mother and daughter.

An adopted child is a legal relative.

A foster child is not a legal relative.

A couple who are cohabiting are not considered to be legally related at this question although coded as husband and wife on household schedule.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 7

SUBJECT. Informants permanently unable to work

REFER ALSO TO Q. 1

CODE: _____

At A221 code '1' if permanently unable to work and '2' if inability to work is not permanent.

POINTS TO NOTE:

Asked only of men under 65 and women under 60 coded 5 or 7 at 1(b).

Informants reply is to be accepted at this question.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 8

SUBJECT: Informants currently 'None of these' or 'Sick or injured not intending to seek work', who have worked in the twelve months prior to interview.

REFER ALSO TO Q: 1 and 'A' Schedule front page.

CODE:

At A215 code the total number of weeks worked in the twelve months prior to interview.

At 380 code usual pay and period covered after all deductions (new in 1984).

POINTS TO NOTE:

Asked only of men under 65 and women under 60 coded 5 or 7 at 1(b).

Accept informants reply to this question.

If period of work is three days or less ignore. If 4-7 days count as one week.

Include paid holiday, paid sick leave, statutory sick pay but exclude weeks on strike.

Informants who have worked in the last 12 months should have been asked (b) & (c).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q. 9 & 9(b)

SUBJECT: Type of job - all coded 1-4 at Q1

REFER ALSO TO Q. 1, 10 - 41, 86

CODE:

At A210 code occupation in most remunerative occupations.

At A211 code industry of most remunerative occupations.

Subsidiary occupations should be coded '1' at A212 if employee or '1' at A214 if self-employed.

At A276 code '1' if director in main occupation.

At A277 code '1' if director in subsidiary occupation.

POINTS TO NOTE:

Code A210 should be used for coding the informant's current occupation if coded 1 or 2 at Q1 or last occupation if coded 3 or 4 at Q1. The code to be entered is based on the OPCS Classification of Occupations, 1980 - and it is the manuscript number written on the left of the page headed "Occupation Unit Groups" which should be used.

Code A211 is for coding industry and this is based on the CSO's Standard Industrial Classification (revised 1980) and it is the amended order number written in manuscript for each other in the Classification which should be used.

Where 2 or more jobs are shown at Q9 the rest of the schedule should be check to ensure that the most remunerative has been coded first. A person should only be coded as having more than one job provided the jobs are held concurrently (ie. the person is or will be paid concurrently). Thus a person who has one job during the week and a second job at weekends is to be regarded as having two jobs but a person who is working at one job at time of interview but has an arrangement to start a different job at a future date (ie. he is going to change jobs) is not to be regarded as having two jobs.

If it is in the nature of a person's employment to work for more than one person or organisation eg domestic help, jobbing gardener etc., this should be treated as one job as employee or self-employed according to circumstances.

If a part-time job has been entered at this question and there are no codes to cover the job, code as though it were a full-time job (eg. Territorial Army Officer).

This question must be coded if Q1 is coded 1-4 (unless the informant has not worked before, eg school leaver).

Mail Order agents and baby sitters should not be entered at this question (see Q85).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 10

SUBJECT: Last pay date

REFER ALSO TO Q: 3, 12

CODE: _____

At A204 code FES week and year in which informant was last paid, using Appendix A.

At A250 code "1" if the date on which the informant was last paid a wage or salary was within the pay period as given at Q.11.

POINTS TO NOTE:

If the date was not within the last pay period, a check should be made to ensure that an adequate reason is contained within the schedule data - eg. a reason for absence at Q3. The date of the last wage/salary received sometimes appears to be out of the pay-period at Q12 because of various reasons but in fact is not, some of the reasons are enumerated below:

1. The informant was sick on the last pay-day or absent for some other reason. This may include a period of sickness up to 12 months.
2. The informant had an advance of pay before going on holiday before last pay date.
3. The informant has changed his job and has not yet been paid.
4. The informant is a part-time school teacher or school worker.
5. The informant had an unpaid holiday before joining a new job or coming back to his job.
6. Although wage/salary was actually received in the last pay period details given at Q10-16 are for an earlier date. This could arise because informant had lost relevant pay slip and given details from earlier one in order to provide best estimate.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE

Considering the situation it may be necessary to change the normal pay-period into actual incidence of pay period. When the informant's last pay or salary period falls within the actual pay-period (when necessary to be found out after adjustment) '1' should be entered at code A250. For example if a respondent works every alternate week then his earnings at alternate weeks should be considered as earnings for two weeks and the actual frequency of earnings as a fortnight.

Any discrepancy in pay dates should be referred to supervisor.

CODING DATE OF LAST PAY

The code to be entered at A204 is a two part four digit code.

The first two digits should be the code for the week in which the day and month of pay date occurred (see Household Schedule Appendix A 'Week Codes'). The third and fourth digits should indicate the year eg. 84, 85.

Example

If the date of last pay is given as 25th January 1985 the code to be entered should be 0485.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 11

SUBJECT: Last wage/salary after all deductions

REFER ALSO TO Q: 3, 10, 12-16, 23, 26-29, 52-55

CODE:

At 303 code the last wage/salary after all deductions and period from Q12.

At A234 code '1' if last wage or salary is known to include statutory sick pay.

POINTS TO NOTE:

The amount of wage or salary entered by the interviewer at code 303 may have to be amended because the period shown at Q12 is not covered by any of the period codes specified in the general instructions.

For a person temporarily (ie. less than 12 months) not working for any reason, the wage or salary required is the last sum received from any employer whether or not the informant expects to return to the same employer.

Where someone has recently started work at his current job and not yet received any pay, the object is to code details of the pay, in his current (new) job. The interviewer has been asked to obtain details of the first pay, if this is received during the record keeping period; she may however have recorded details of pay in the last job and what the informant expects to be paid in this one. If she has recorded details of the first pay these should be entered at the codes on page 6. If she has not the budget should be referred for more information. If no more information can be obtained an estimate should be made, based on what the informant expected to receive. If the interviewer has not recorded this, pay details of the informant's previous job should be accepted, and the previous job coded at question 9.

Part/made-up pay - If part pay (ie. that which is paid by an employer to supplement statutory or N.I. sickness benefit) is indicated, the details of Qs 11-16 should be accepted and coded without amendment. In all such cases details of usual pay should be entered at Q23; if these details have not been given, usual pay should be taken to be the made-up pay shown at Q11 plus the netted statutory sickness benefit if shown as being received at Q52, N.I. sickness benefit at Q53 or invalidity pension plus allowance at Q54.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D)

Allowances/refunds - See notes on Qs 26-29 which explain how the pay details on this page should be adjusted to take account of these.

Maternity pay under the Employment Protection Act should not be entered at this question. See Q63.

If pink self completion sheets have been used the interviewer should have transcribed the information onto the schedule.

Non-UK currency - Where an informant is working in the UK but paid in a Non-UK currency the income remitted to the UK should be shown at Q11-16.

Last income when abroad - Where an informant's last job was abroad and they are now unemployed enter last income abroad at Q11-16 (see also 'None of these').

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 12

SUBJECT: Period covered by last wage/salary

REFER ALSO TO Q: 10, 11, 13-16

CODE: _____

At A213 enter the period code.

POINTS TO NOTE:

The period given is required for the period coding at codes 303, 304, 305, 306 and item codes at Q16. Note, however, that the period codes 1, 2, 4 and 5 given at Q12 are not the only codeable periods and if, for example, the period is specified as 3 weeks then period code 3 should be used.

In general, the period given by interviewers should be accepted.

The coding of this question should relate to the actual period and not to the normal one if the two differ. For example, if the interviewer has noted that a person last received 3 weeks wages in 1 week because, say, he was about to start a holiday, the period code should be 3 and not 1. However, periods of less than a week should be coded as "weekly".

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q 13

SUBJECT: Refunds of income tax

REFER ALSO TO Q: 10-12, 14-16, 23

CODE: _____

At 304 code the number refunded and period from Q12.

POINTS TO NOTE:

If a refunded is shown at this question it should be accepted unless a tax payment is shown at Q14 when reference should be made to supervisor.

A refund of tax indicates that pay is not normal pay.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 14

SUBJECT: Income tax deducted under PAYE

REFER ALSO TO Q: 10-13, 15, 16, 23

CODE: _____

At 305 code the amount deducted and period from Q12.

POINTS TO NOTE:

In general the amount of tax shown as deducted should be accepted. However if a tax refunded has been shown at Q13 and a deduction is given at this question, then reference should be made to supervisor.

If a tax deduction has not been made but at 14(a) code Yes ... Y has been ringed then the pay at Q10-16 is not normal pay and normal pay should be shown at Q23.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. B

Q. 15

SUBJECT: National Insurance Contribution

REFER ALSO TO Q. 10-14, 16 and pay slip code (page 7).

CODE:

At 306 code the amount deducted as a National Insurance Contribution and period from Q12.

POINTS TO NOTE.

IT IS NO LONGER NECESSARY TO CHECK N.I. CONTRIBUTION AMOUNTS WHERE A PAYSLIP HAS BEEN CONSULTED BY INTERVIEWER OR INFORMANT. WHERE AN AMOUNT IS MISSING HOWEVER IT WILL BE NECESSARY TO IMPUTE.

Where an informant has two or more jobs as an employee, National Insurance contributions (as an employed person) may appear, and can be accepted, at this question and at Q34.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 16

SUBJECT: Other deductions from pay

REFER ALSO TO Q: 10-15, 23

CODE:

Enter code 318 against superannuation, private pensions and Widow and Orphans Insurance (not charity) and add period code from Q12.
Enter code 422-429 from code frame below for other deductions and add period code from Q12

POINTS TO NOTE:

OTHER DEDUCTIONS FROM CODING FRAME (EXCLUDING CODE 318)

'B' SCHEDULE CODE	Description of Item	Examples
422	Participant sports and specialised pastimes	Athletic clubs; Sports and Social clubs; Band levy; Camera Club
424	Subscriptions to Trade Union, Professional Associations etc	Union fee; Police Federation; Shop Stewards Fund; Checkweigh
425	Other subscriptions	Aged Business Levy; Welfare Levy; Social Club; PO Fellowship
426	Charitable gifts	Police Fund; Widows and Orphans Charity; Widows Fund
427	Miscellaneous expenditure on services	Legal Aid; Additional voluntary contributions
428	Cash gifts not allocated elsewhere	Testimonial fund; General purpose; Collection for cash gifts
429	All other codes not specified above	THE AMOUNT MUST BE TRANSFERRED TO 'D' SCHEDULE AND GIVEN RELEVANT ITEM CODE IF NOT ALREADY ON 'A' SCHEDULE

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE.

- a. If an item deducted at this question is an 'A' schedule item the relevant 'A' schedule question should be checked to ensure that there is an entry there. An 'A' schedule item should not be transferred to 'D' schedule. Entry on 'B' schedule should be coded 429.
- b. If an item deducted at this question is a 'D' record item the 'D' record should be checked to see if there is an entry there. If there is an entry in the 'D' record it should be deleted to avoid duplication. (SEE 'd' below for exception).
- c. An item should only be transferred if there is a code '1' at A250 (Q10).
- d. Where there is a code 429 deduction from salary, the amount should also be shown in 'D' record with the appropriate item code.

Items transferred to the record books should be entered on page 7 of the books. If pay is received weekly, the item should be entered in each book, if pay is received for any other period then the weekly equivalent should be entered in each record book.

Care must be taken to avoid duplications and if the informant has already entered an amount in the record books which was a deduction from pay, the item should not be entered again in the record book.

- e. If the informant has given the total amount of deductions and what items this covers but has not been able to apportion the amount as between the items, the proportions should be estimated as realistically as possible, eg. if an amount covered superannuation and firm's sports club, most of the deduction is almost certainly for superannuation and only say 10p-50p per week is likely for the sports club.

If there is no basis for an estimate of this kind then simply divide. code the amount equally between the items. Where nature of deductions is not known, code as 429 on 'B' schedule and 797 on 'D' schedule.

- f. It may be that a particular deduction is not made from every payment of wage or salary. An example of this could be an insurance premium deducted quarterly although the pay period is monthly eg. the deduction is made from one payment in three.

These circumstances will usually only be apparent from the interviewers notes at Q16.

1. If the deduction is entered at Q16 it must be accepted and not apportioned so that it is spread over all pay periods.
2. If the deduction is not entered at Q16 but an interviewer's note shows that such a situation exists, a proportion of the deduction must not be entered at Q16.

New in 1985 is Q16(a), (replacing old instruction) where gross salary is asked for if pay slip consulted by informant or interviewer. The gross salary should be used as a check on Q9-16. Also see 'K' schedule.

PAY SLIP CONSULTED

A single code should be entered at A235. If no code ringed by interviewer treat as pay slip not consulted. If codes 3 & 4 ringed code 5.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 17

SUBJECT: Hours usually worked in a week excluding meal breaks and all overtime.

REFER ALSO TO Q: 10-16, 18-23

CODE: _____

1. at A220 number of hours.

POINTS TO NOTE:

Note that this question excludes all overtime.

In some cases it will not have been possible for the informant to answer this question due to the nature of his or her job (eg casual, professional or seasonal workers). In such cases code '0' should be entered at A220.

If hours excluding overtime vary within a regular pattern (eg 40 hours one week on day shift and 48 hours next week on night shift) code average weekly hours (eg 44).

Where necessary, hours given at this and Q18-21 should be rounded:

1. $\frac{1}{2}$ hours should be rounded to nearest even hour
2. Fractions other than $\frac{1}{2}$ hours should be rounded to nearest whole number.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 18

SUBJECT Average number of hours of paid overtime

REFER ALSO TO Q: 10-17, 19-23

CODE: _____

1. at A244 number of hours.

POINTS TO NOTE:

Note that this question refers only to paid overtime.

Fractions of an hour should be rounded as instructed at Q17.

If question not answered because of irregular hours code '0' at code A220 Q17.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 19

SUBJECT: Actual hours worked for last pay where the pay covered a week

REFER ALSO TO Q: 10-18, 20-23

CODE: _____

At A216 code number of hours.

POINTS TO NOTE:

This question relates to paid hours worked. Meal intervals should not be included, nor should unpaid overtime.

The number of hours worked as paid overtime should be included. This is not necessarily the number of hours pay received for it; thus one hour paid at time and a half should only count as one hour.

Working hours at this question and at Q20 should include any paid hours (except meal breaks) away from work because of holiday or sickness.

If question not answered because of irregular hours code '0' at code A220 Q17.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q: 20

SUBJECT Weekly hours worked for last pay where pay covered a different period than a week.

REFER ALSO TO Q 10-19, 21-23

CODE

At A216 code number of hours.

POINTS TO NOTE

See notes at Q19.

It is necessary to ensure that the number of hours worked per week have been given and not the total hours for the period covered by the pay.

If question not answered because of irregular hours code 0 at code A220, Q17.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 21

SUBJECT: Number of hours of paid overtime in hours included in answer at 19 or 20.

REFER ALSO TO Q: 17-20, 22 & 23

CODE:

1. at A219 code number of hours.

POINTS TO NOTE:

Only paid overtime hours are required at this question.

Where pay is for period other than a week it may be necessary to adjust hours to a weekly figure.

- a. If two weeks overtime given adjust by dividing by two.
- b. If four weeks overtime given adjust by dividing by four.
- c. If calendar months overtime is given, calculate the number of working days in the month at or near last pay date and take from this five parts and apportion accordingly.

If question not answered because of irregular hours code 0 at code A220, Q17.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q. 22

SUBJECT: Items that could affect pay

REFER ALSO TO Q: 10-16, 23, 51

CODE: _____

N/A

POINTS TO NOTE

This question is an editing guide to the reason that last pay could not be considered usual pay.

If Q22 has a code ringed it is to be expected that Q23 will be answered 'No' and an amount entered at (a) and (b).

Tax adjustment for previous unemployment benefit/supplementary benefit came into effect in April 1982.

Payment of Statutory Sick Pay could effect last pay (see Q52).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 23

SUBJECT: Usual wage/salary

REFER ALSO TO Q: 10-22

CODE: _____

At A254 code "1" if the wage/salary mentioned at Q11 is usually received (ie. "Yes I" has been answered).

At 329 code usual net pay (if A254 not coded "1").

At 315 code usual gross pay (if A254 not coded "1").

POINTS TO NOTE:

1. If Q22 has items coded it is to be expected that this question will be coded "No".

2. The term "usually receive" in this context is, of course, subjective and the answer to the question will depend largely on what the informant understands the term "usual" to mean. In general the informant's answer should be accepted without question. However in cases where it is in the nature of the employment to receive for a number of weeks each year a different rate of pay than for the other weeks of the year, then an average weekly (monthly, etc.) pay should be calculated at Q23 based on one year's income. The most common examples of this are ancillary workers at educational institutions (eg. school meals attendants) who receive 41 weeks full pay and 11 weeks part pay. Another case in point is a supply teacher who usually receives a higher rate of pay than ordinary teachers whilst working but no pay at all in the holidays. The circumstances of these cases are normally only apparent through an interviewer's note on the schedule: however, if there is no such note and Q23 has been answered unequivocally, then that answer should be accepted and no attempt made to adjust the average pay at Q23.

3. However if the interviewer appears to have entered the "basic pay" at Q23 the budget should be queried.

4. It is no longer necessary to check the relationship between usual pay and last pay and usual hours (Q17) and hours associated with last pay (Qs 19 and 20). However it is necessary to check difference between Qs 23(a) and (b) and refer to supervisor if net pay at 329 is greater than gross pay at 315.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE

5. If the interviewer has only shown the net figure, then this, together with the calculated tax payable and National Insurance contributions and any other standard deductions shown at Q16 should be used by supervisor to obtain an estimated gross figure.

Similarly, if only the gross figure has been given, then this minus the calculated tax payable and National Insurance contributions and any other standard deductions at Q16, should be used by supervisor to obtain an estimated net figure.

The following points are important when estimating these figures.

- a. Tax payable should be calculated on basis of personal allowances and reference to Daily Mail tax guide PLUS any amendments arising from later legislation.
- b. In assessing the tax-liability all taxable gross income should be added together. From this grand total of gross incomes all tax allowances should be deducted.

The tax liability will then be calculated on the basis of current tax rates.

- c. Any tax paid at source or direct to Inland Revenue (as shown at other parts of the schedule) should be subtracted from the total tax payable, and it is the remainder which should be used for estimating the gross (or net) figure at Codes 315 or 329. If the income shown is a net figure instead of gross amount, an allowance will have to be made in the calculation of the gross amount.

- d. National Insurance contributions vary with income and the appropriate rate for the usual income must be used.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 24

SUBJECT: Occasional additions to pay

REFER ALSO TO Q: 10-23

CODE:

At 330 code the net annual amount of any occasional additions to pay.
At 312 code the gross annual amount of any occasional additions to pay

POINTS TO NOTE:

The amount shown at this question should be actual money income (eg. cash, cheques, bank credit, G.P.O payment orders): therefore such entries as the cash value of vouchers issued to spend in shops, shares in the company, and any income in kind, should be deleted. It is not intended at this question to include any windfall income and therefore income coded here must have some periodicity and expectancy associated with it even though this may be only once a year or conceivably even longer.

Interviewers have been instructed to ask informants whether any bonus, commission etc., has been included in the usual/average pay at Q23. The nature of the answer recorded at the right hand corner of the box below Q24(a) will provide a check for the inclusion or exclusion of bonus, commission etc. regularly or frequently received. Bonus, commission, etc., received on a regular and frequent basis, such as with every other pay, should properly have been included with details of usual/average pay at Q23. However, if at Q24(a) it is shown that such a bonus has not been included at Q23, there is no need to re-code Q23:

Where it is shown at Q24(a) that a bonus has been included at Q23 then that bonus should be ignored in the coding of Q23.

To code Q24 the following procedure should be used:-

a. If the bonus was meant for a part of the year only, then calculate the total amount of bonus that the informant would have earned for the whole year.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE.

b. If the informant was paying any income tax as would appear from Qs 14 or 85, then the tax should be assessed (if the bonus shown was before tax) according to the current rate of tax. If on the other hand the bonus was net of income tax then the gross amount of bonus should be calculated from the following formula (for basic tax rate)

$$\text{NET BONUS} \times \frac{100}{100 - \text{CURRENT RATE OF TAX}}$$

c. If it appears that the informant is not paying any income tax at Q's 14 or 85, then the total gross bonus for the whole year should be added on to the gross earnings for the year. Income tax should be assessed on the total of these amounts and this tax deducted from the gross bonus in 312 to give the net bonus to be coded at 330.

d. If the informant does not know whether the amount of bonus is net or gross, an assessment should be made based on tax liability, tax paid, occupation, industry, etc., of whether it is likely that tax would be payable or not and also, if it is likely that tax would be payable, whether the amount of bonus shown is net or gross. All such cases should be referred to supervisor.

NB Income as dividends of company should be entered at Q77.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 25

SUBJECT: Amount allowed for tax relief to employees for work expenses

REFER ALSO TO Q: 1(a)

CODE:

At 370 code the total amount entered in the grid.

POINTS TO NOTE:

APPLIES ONLY TO THOSE CURRENTLY EMPLOYED OR WHO HAVE BEEN UNEMPLOYED THIRTEEN WEEKS OR LESS.

The amounts shown should not be used to amend any entries in the budget, except when tax relief for car expenses is noted. In that case

- a. the amount shown should be referred to Q27 as a "fixed allowance" and used to abate car expenditure.
- b. the budget should be referred to supervisor in order that income tax and net wage can be amended ie. tax allowance will be reduced, tax increased and net wage reduced.
- c. the tax relief for car expenses should not be included in the total entered at 370.

The following figures, based on 1978 analysis, should be used for imputing unknown amounts:

Clothing (incl. footwear)	£16.00 PA
Tools	£24.00 PA.
Professional societies	£13.00 PA
Clothing/tools combined	£28.00 PA
Books	£25.00 PA
Others	£25.00 PA

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q- 26-29 GENERAL
NOTES

SUBJECT Refunds and allowances received in connection with the most remunerative job, where this is a job as an employee.

REFER ALSO TO Q- 1, 2, 'B' schedule Q1 on page 20 of the D schedule.

CODE:

The amounts given at these questions are not entered at any codes but are used to adjust entries at certain codes in the A and B schedules, and in the D books.

POINTS TO NOTE:

APPLIES ONLY TO THOSE CURRENTLY WORKING OR WHO HAVE BEEN UNEMPLOYED FOR THIRTEEN WEEKS OR LESS.

PURPOSE

These questions have three purposes.

1. to edit business expenditure out of the A (and in some cases D) schedules,
2. to make it possible to adjust the pay details on page 6 and Q23 on the B schedule,
 - a. so that they do not contain refunds/allowances for business expenses
 - b. so that Q23 gives the usual net and gross pay including the average amount of private (non-business) expenses refunded by' (or covered by an allowance from) the employer - if this gives a different net and gross from the amounts on page 6. However this pay on page 6 should not be altered to include private expenses refunded/allowed if it doesn't do so already ie, the last pay on page 6 should be as stated by informant in regard to private expenses refunded/allowed.
3. NB. PAYMENTS MADE DIRECTLY BY AN EMPLOYER ARE NOT TO BE TREATED AS REFUNDS OR ALLOWANCES.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE:DISTINGUISHING BUSINESS AND PRIVATE EXPENSES

Rules are needed to decide when an allowance or refund covers business expenses and when it is for private expenses. The following general rules apply for jobs as an employee (but not for self-employed jobs). Their detailed application is dealt with in the notes on the individual questions

1. Car expenses refunded (or covered by an allowance) always count as business expenses.
2. Telephone expenses refunded (or covered by an allowance) always count as business expenses.
3. Expenditure (other than telephone expenditure) referred to at Q26, incurred on the sample address and refunded (or covered by an allowance) counts as business expenditure if part of the rateable unit is used for business - so long as the amount of the refund/allowance is not disproportionate. Where the rateable unit is not used for business, expenditure covered by a refund/allowance counts as private.
4. Expenditure on lodging refunded (or covered by an allowance), when it is for a member of the household who has to live away from the household some of the week on business, counts as business expenditure.
5. Expenditure on transport (other than on cars) refunded, or covered by an allowance, counts as business expenditure if it is for travelling on the job, or for getting to work where the nature of the job is such that the place of work varies (as in the building trade), however, if it is for getting to work otherwise, it counts as private expenditure.
6. Meal allowances are private unless they are only received occasionally, in which case they count as refunds of business expenditure.
7. Other items refunded (covered by an allowance) count as business expenditure if they could be used in connection with the informant's work.

In general whether an amount covered by a refund/allowance counts as business or private expenditure depends on the type of expenditure. It does not depend on the regularity of the refund/allowance.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D).AMENDING DETAILS OF PAY AND EXPENDITUREA. General

A very important feature of Qs 26-29 is the amount of money they ask for in connection with each refund/allowance.

i. Q26 asks for amount refunded against a specified amount shown at a question in the expenditure question.

This question also obtains details of the amount of that refund included in last pay.

ii. Q27(a) asks for amount in last pay of fixed or mileage allowance.

iii. Q27(b) asks for amount in usual pay of fixed or mileage allowance.

iv. Q28 asks for amount of other motoring expenses refunded in last pay.

v. Q29 asks for amount and description of general expenses refunded in last pay.

These amounts should be treated differently when amending schedules (see below).

B. Amending Details of Pay

NOTE THAT ACTION TO BE TAKEN HAS BEEN AMENDED FOR 1983.

1. Where it is noted at Q26-29 that a refund/allowance covering a business expense has been included in the pay on pages 6 and 7 and Q23.

a. The amount included in last pay should be deducted from both the gross and the net pay on pages 6 and 7.

b. At 27(b) the amount included in usual pay should be deducted from usual net and gross at Q23. If an amount has been included in usual net and gross but the amount is not known use the amount included in last pay.

NB Qs 26, 27(a), 28 and 29 affect last pay only. Q27(b) affects usual pay only.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

These rules have implicitly assumed that refunds/allowances that have to be added to or taken from pay are not taxed - which means that the same amount can be added to, or taken from the gross and the net pay. If the interviewer has noted that a refund/allowance is taxed or that its gross and net value are different, the budget should be referred.

Examples

a. A monthly paid employee gets £10 allowance per quarter for telephone expenses, and his last gross pay included £9.50 telephone allowance. His pay at page 6 is £300 before deductions, £200 after. Then the gross and net at pages 6 & 7 should be altered to £290.50 and £190.50.

b. An employee's monthly pay is given as £200 gross and £140 net on pages 6 & 7 and code 1 is ringed at Q23. His gross pay did not include an allowance of £20 a month towards renting the sampled address, which is not used for business. His pay figures on pages 6 & 7 should not be altered.

C. Amending Expenditure Recorded in the A Schedule

If the refund/allowance covers private expenditure no action should be taken. If the refund/allowance covers business expenditure the amount, brought to the same time period, should be deducted from the entry in the A Schedule.

Example A manager received £3 per month telephone allowance. His last quarterly phone bill came to £20. The abated amount to enter at Q50 (A Schedule) is £11 per quarter.

D. Amending Expenditure Recorded in the D books

In general the information recorded at Qs 26-29 should not be used to abate D schedule items, which should be abated using Q1 on page 20 of the D books. However

1. Refunds/allowances for car expenses and for slot meter payments are an exception to this rule - see notes on Qs26 and 27.

2. Entries at Q29 may suggest that expenses recorded in the D book are in fact business expenses for which the informant gets an allowance or which he will have refunded - even though no entry is made on page 20 of the D schedules. These cases should be referred.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. B

Q. 26

SUBJECT Refunds and allowances for "household expenditure" received in connection with the most remunerative job, where this is a job as an employee.

REFER ALSO TO Q. 1 page 20 (D schedule), Qs 12, 13, 94-97 'A' schedule.

CODE

POINTS TO NOTE.

See the general notes on Qs 26-29.

The amounts given here are used to adjust entries at certain codes in the A and B schedules, and in the D bookso.

The following refunds/allowances should be treated as being for business expenditure

1. refunds/allowances for telephone expenditure, road fun tax, vehicle insurances, vehicle purchase.
2. refunds/allowances for expenditure on lodgings for a household member who has to be away from the sampled address for some of the week in connection with his work, if mentioned at this question (but remember (i) to be careful that the informant really is a member of the household (ii) an entry at this question should not be used directly to abate D book expenditure).
3. help with items of "household expenditure" (other than phones) for the sampled address if part of the household's share of the rateable unit described at Q97 (A schedule) is used for business (see Qs 12 and 13 A schedule). In that case work out what percentage of rooms are used for business, counting a room partly used for business as half a room used for business. (For this purpose rooms' means rooms occupied by the household as defined in the notes on Q97 A schedule). We would expect the refund to cover roughly this percentage of expenditure on the item. Then work out the percentage by which expenditure on the item would be reduced if it were abated by the amount given at Q26. If this percentage is within 10% of the "expected percentage" abate by the amount given at Q26. If it is not within 10% the budget should be referred. (eg. Suppose the "expected percentage" is 30%, then the item should be abated by the amount at Q.26 if this leads to a reduction in expenditure on the item of anything between 20% and 40% inclusive. Otherwise the budget should be referred to supervisor).

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

Where expenditure on rates (or rent including rates) is abated the rateable value should be abated by the same proportion.

Where none of the household's share of the rateable unit is used for business, amounts refunded or covered by an allowance (for items other than phones) should be treated as being for private expenditure.

Please note the following points:

- a. Subsidised Rents: Where an employee is paying a subsidised (ie. reduced) rent, there is no need to amend either the rent at Q19 A schedule, or the wage/salary at Qs 10 and 23 'B' schedule.
- b. If a rent allowance is being paid in respect of an accommodation which is owner-occupied, the tenancy should still be regarded as owner-occupied.

Examples

An owner-occupier has a house with an RV of £300. It has 10 rooms (of the types indicated in note 3 above). He pays £300 rates (not including water rates) per year and £80 a month on a mortgage. At Q26 it is noted that he has allowances from his employer of £6 a month for his rates and £20 a month for his mortgage. At Q26 it is also noted that these amounts were included in his last pay.

- i. If no rooms in this house are used for business these allowances are treated as refunds of private expenditure and no action should be taken.
- ii. However, if 2 rooms (say) are used for business these allowances should be treated as refunds of business expenditure. The "expected percentage" is 20% ($2/10 \times 100\%$). If the payments were abated by the amounts at Q26 the reduction would be by 24% for the rates and 25% for the mortgage. As these amounts are within 10% of the "expected percentage" they need not be referred and should be used to abate the rates and mortgage respectively. Thus the abated rates payment will be £228 (£300 - £72) a year and the abated mortgage payment will be £60 a month. Since the rates payment has been abated by 24% the RV must be as well, so the RV at Q96 becomes £228. Since the allowances now count as refunds of business expenditure they must not be included in the informant's pay details - which should be adjusted in the way described in the general notes on Q26-29.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):Gas, Electricity and Telephone

Where gas or electricity is paid by slot meter the D book entries should be abated on the basis of the entry at this question (provided abatement is indicated by above rules), not on the basis of page 20 in the D book. The two weeks record keeping should be taken together when abating. Any rebates entered at Q.55 on the A schedule should also be abated in the same proportion as the slot meter payments. In the case of telephones, amounts at this question should be used to abate entries at Q50 on the A schedule. D book entries concerning telephones should be abated on the basis of amounts given at page 20 of the D books.

Road fund tax, vehicle insurance, vehicle purchase

Entries in 'A' schedule should be abated by amounts shown at this question. See Q27 or 28 regarding running costs of vehicle.

Garages

Where the interviewer has noted that the informant receives a refund/allowance covering rent or rates on his accommodation, this should not be taken to refer to rent or rates on a garage unless they are paid in with those for the sampled address.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 27 & 28

SUBJECT: Refunds/allowances for motoring expenses in connection with the most remunerative job, where this is a job as an employee.

REFER ALSO TO Q: 14, 62-67, 69-76 A schedule, Q1 on page 20 of D books.

CODE:

The amounts given at these questions are used to adjust entries in the A, B, and D schedule

POINTS TO NOTE:

See the general notes on questions 26-29.

Motoring expenses refunded, or covered by an allowance, always count as business expenses.

Fixed and Mileage Allowances

For the purposes of abatement these are taken to cover:

- Petrol & motor oil
- Road fund tax (net)
- Insurance
- Maintenance
- Repairs
- Leasing of vehicle
- Depreciation

Rent & rates of a garage, where these are paid separately unless the interviewer has noted that garage is used solely by other members of the household. (If two or more members of the household receive motoring allowances which would go towards the rent/rates of a garage, the payment at Q14, A schedule, should be split between them for abatement purposes).

Other motoring expenses coded 549 in the record books.

NB If road fund tax, vehicle insurance and vehicle purchase are shown at Q26 it should be assumed that they are excluded from amounts at this question.

A rule is needed to decide how much the allowance is as a percentage of expenditure and how it should be divided between the different items for the purpose of abatement. This is done by the "car sheet" calculations in which all motoring expenditure is brought to an annual basis. In the case of entries in the D books this is done by multiplying the fortnight's expenditure by 26, except for annual items eg. MOT which are costed at value entered in diary. The allowance entered at Q27 (ai) is also brought to an annual basis and the following percentage is calculated.

$$\frac{\text{average annual allowance}}{\text{estimated annual expenditure on items covered}} \times 100 \%$$

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D)

This percentage is used to abate the items on the A and D schedules covered by the allowance.

In making this calculation the following points should be noted.

1. the expenditure used in the calculation should be that in the informant's own D book, and the entries specifically referring to him in the A schedule (but see the note above about garages).
2. If the informant has not recorded purchasing any petrol in the D books the budget should be referred.
3. Repairs should be included only if they appear in the D schedule. If they do appear, multiply expenditure in the two weeks record period by 26 to obtain an estimate of annual expenditure on repairs.
4. Depreciation should be taken as the cost of the vehicle (after deduction for trade-in) at Q65 'A' schedule as defined at that question, for a vehicle purchased for cash or informal loan (ie a loan which doesn't count as 1-4 or 7 at Q69 or 70 'A' schedule,) or as the annual repayments plus four times the downpayment for a vehicle being purchased at Q75 'A' schedule.

Where an entry is made on page 20 of the D schedule (in the case of Fixed and Mileage Allowances)

In these cases abatement of the D schedule motoring expenses should still be on the basis of Q27 B-schedule, NOT page 20 D schedule. However in the case of fixed allowances if the amount at page 20 is different from the fixed weekly amount the budget should be referred.

Where an entry at page 20 D schedule covers both (fixed or mileage) motoring expenses and some other expenditure without saying how much is for each, then the motoring expenses should be abated as outlined above. The amount abated for motoring expenses in that week's D schedule should be taken from the amount at page 20 and the remainder should be used to abate the other types of expense.

Refunds for other car expenses

Where it is noted at Q28 that the allowance takes this form the 'D' schedule entries are abated in a different way and the refund is assumed to cover petrol only unless there is a refund for other motoring expenses in 'D' schedule in which case those items should be treated as also being refunded at Q28.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

D schedule petrol entries should be abated by the amounts entered at page 20. The information at Q28 should not be used unless no entry has been made at page 20. In that case the petrol expenditure should be abated by amount of Q28.

Where the informant has both a fixed or mileage allowance and gets refunds for other motoring expenses.

The petrol expenditure should be abated first and the "car sheet" calculations should then be applied to the motoring expenditure remaining after this initial abatement.

Monthly accounts paid during record keeping

Where petrol or other motoring expenses are paid for by monthly account (including credit card) the payment should be treated as a normal D or A schedule item when making car sheet calculations ie. grossed up by a factor of 26.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 29

SUBJECT. Other refunds or allowances received in connection with the most remunerative job, where this is a job as an employee.

REFER ALSO TO Q. 25-28 (B schedule), Q1 page 20 D schedule

CODE

POINTS TO NOTE.

The amounts given at this question are used to adjust entries at certain codes in the A and B schedules.

See the general notes on questions 26-29.

The purpose of this question is to make it possible to adjust A schedule entries and pay details for allowance/refunds not covered by Qs 26-28.

Entries at this question should not be used to abate D book items. However they may suggest that certain D entries are in fact business expenses which are refunded or covered by an allowance, even though no entry has been made at page 20 of the D book. In that case the budget should be referred.

Meal allowances

If an allowance for meals is recorded here treat as private expenditure unless the interviewer has recorded that it is only received occasionally when it should be treated as business expenditure and the D books abated on the basis of information at p20 D schedule.

Where the allowance is treated as one for private expenditure, the D books should not be abated, but refer the budget if there is an entry at p20 D schedule relating to meal expenses.

Refunds/allowances for expenditure on lodgings. see the paragraph relating to this at Q26. These allowances may also be recorded at this question.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 30

SUBJECT. Luncheon vouchers, free meals and other free food received from employer in main job.

REFER ALSO TO Q: 1, 2

CODE: _____

At 316 enter total value of luncheon vouchers used in last seven days.

At 320 enter total imputed value of free meals supplied in last seven days.

At 320 enter total imputed value of other free food supplied in last seven days.

POINTS TO NOTE:

APPLIES ONLY TO THOSE CURRENTLY EMPLOYED OR WHO HAVE BEEN UNEMPLOYED THIRTEEN WEEKS OR LESS.

a. Luncheon Vouchers This refers only to free vouchers supplied by the informant's employer. Total value of vouchers used in last seven days should be entered at code 316.

b. Meals supplied free The total imputed value of the meals should be entered at code 320 even if the actual value of the meal has been given; the current values to be used in calculating the total imputed value are shown in Table 1. The first 5 meals should be valued at a higher rate and the remainder at the lower rate; all meals described as tea or breakfast should be valued at the lower rate. See Table 1 page 133.

Any free meals to resident employees such as au pair girls or farm workers should be deleted from this question.

c. Other food supplied free The total imputed value of other foods (including potatoes but excluding eggs and milk) in the last 7 days should be entered at code 320. If imputed value not available enter the estimated retail value. The current market price of eggs and milk should be entered at 320, unless supplied by farm when imputed farm gate prices should be entered. See Table 1 page 133.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D).

TABLE 1
(DATA SUPPLIED BY CSO
TO PAB)

Current Imputed Value of Benefits in Kind Obtained from Employers

As these values are liable to change from time to time, space has been provided for entering changed values.

Commodity	As at Jan 85	Imputed Value					
		Change	Date	Change	Date	Change	Date
Meals	Higher Value						
	a						
	meal						
	Longer Value						
	a						
	meal						
Potatoes	per						
	ton						
Bacon	each						
Pigs							
Piglets	each						
Coal	per						
	ton						
Milk -	per						
Farm Gate	gallon						
Eggs -	dozen						
Farm Gate							
							251

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 31-34

SUBJECT: Subsidiary job(s) as an employee

REFER ALSO TO Q: 1, 9-30, 36-41, 86

CODE:

1. At A255 code "1" if the last pay is in the current pay period.
2. At 309 code the last pay after all deductions plus period.
3. At 310 code any tax deducted plus period.
4. At 311 code any National Insurance contribution paid plus period.
5. At 319 code any deductions shown at Q34 plus period.

POINTS TO NOTE:

1. These questions are essentially replicas of Qs 10-16, but are for coding details of a subsidiary job where this is held as an employer.
 2. A "1" should be entered at code A255 if the last wage or salary was paid within the period shown at Q33.
 3. The amount shown at Q32 should be compared with the amount shown at Q11 (or Q36/7 if the main job is as a self-employed person), and if the amount shown at Q31 is greater (ie. the subsidiary job is more remunerative) for the equivalent period, then the details recorded at Qs 31-34 should be transferred to Qs 10-30 and the details recorded at Qs 10-30 (if applicable) should be transferred to Qs 31-35. The details at Q9(a) and Q9(b) should also be changed.
- Also the coding at Q1 (if the most remunerative job has previously been shown as self-employed) should be changed from "2" to "1".
4. Comments regarding period at Q33 are exactly the same as those already given against Q12.
 5. P.A.Y.E. tax and National Insurance contributions may or may not be entered at Q34. If they are, the coding principles are exactly the same as at Qs 14 and 15 (see previous instructions). However, the tax deduction should be entered at code 310, and the National Insurance contribution at code 311.
 6. Any other deduction shown at Q34 should be entered at code 319. These amounts should also be transferred to other parts of the schedules or record books as indicated in the instructions for Q12 if A255 is code "1".

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 35

SUBJECT Refunds and allowances received in connection with subsidiary jobs as an employee.

REFER ALSO TO Q 1 on page 20 of the D schedule

CODE:

POINTS TO NOTE·

This question is used

1. to edit business expenditure out of the A (and in some cases D) schedules,
2. to adjust the net and gross pay for subsidiary jobs as an employee so that it does not contain refunds/allowances for business expenses.

If the pay last received includes an allowance/refund for private expenses it should be accepted as it stands. However it should not be altered to include private expenses refunded/allowed if it does not do so already. ie. ENTRIES AT THIS QUESTION REFERRING TO ALLOWANCES/REFUNDS FOR PRIVATE EXPENSES CAN BE IGNORED.

When abating entries in the A (and D) schedules, entries at this question should be treated in the same way as comparable entries at questions 26-29.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 36-40

SUBJECT: Income from self-employment (excluding mailorder agents and Baby Sitters)

REFER ALSO TO Q: 1 & 9

CODE:

1. At 326 code net profit from the main self-employed job on an annual or annual equivalent basis. (NB maximum value to be entered = £8340) (See below)
2. At 307 code net loss from the main self-employed job on an annual or annual equivalent basis. (see below)
3. At 327 code the value of self-supplied goods recorded in the two weeks' record keeping.
4. At 328 code net profit from any subsidiary self-employed job on an annual or annual equivalent basis.
5. At 313 code net profit received so far from the main self-employed job if the informant started it less than a year before interview.
6. At A226 code the period ending date for which figures are available.
7. At A227 code the number of months covered by period (see below).
8. At A203 code according to the coding frame.

POINTS TO NOTE:

1. Code 326 The following points should be noted.
 - A. If a figure for net annual profit has been entered at part Q36 or 37, then this is the amount which should be coded. In this connection the following points are relevant:
 - a. Only an annual figure or an annual equivalent should be coded: thus if the informant has only been in business for a few months, the net profit for those months should be grossed up to an annual equivalent and this should be coded. There is a maximum value of £8340.00 which can be entered at this question. Where annual value exceeds this amount convert amount to shorter time period (eg 6 months).
 - b. Profits ploughed back into the business should be included in the amount at code 326.
 - c. If a loss has been sustained over the last 12 months, code 326 should be left blank and loss coded at 307.
 - d. Q37 is asked if the answer to Q36 is a loss. The amounts at Q37 should be used to calculate profit and coded at 326. This means that a profit can be shown at 326 and loss at 307.
 - e. Q37 is also asked if the answer to Q36 is nil profit. The amounts at Q37 should be used to calculate profit and coded at 326. To show that the original answer to Q36 was nil profit, £1.00 should be entered at 307.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D).

f. If 36 and 37 not answered and 38 answered the amount to be entered at 326 is an estimated profit based on turnover.

B. If any partners' shares have been included in the net profit figure given at Q36 the amount will be shown at Q39. Such an amount should be deducted from the figure shown at Q36 before it is coded.

C. Q38 is asked of all informants if Q36 or 37 have not been answered or the answer is nil profit or loss. The amount taken out of the business for the informant's own use and for domestic bills should be grossed up to obtain an annual figure, and it is this, plus any residual net profit shown at Q37(d) which should be entered at code 326.

D. If the informant was unable to answer Qs 36-37, Q38 will have been asked and an estimate of annual net profit will have to be made, based on any known (or estimated) information about profit margins for that type of enterprise, and the level of expenditure as recorded in the informant's and his dependents' record books together with personal overheads recorded on the A schedule, such as rates, electricity, insurances, etc.

2. Code 307 If the informant has made a loss on his main self-employed job the amount of the loss should be entered at code 307. A loss might be given at Qs36 or 37 or, if DK is ringed, worked out from the answers to the subsequent questions. NB if loss given at Q36 then Q37 should have been asked to obtain a profit figure i.e. loss can be shown at 307 and profit at 326. Also if nil profit given at Q36, Q37 should have been asked to obtain a profit. In this case the profit from Q37 should be entered at 326 and £1.00 entered at 307 to indicate original answer of nil profit.

3. Code 327 Self Supply Goods Persons in their own business often supply themselves with produce from their own shop, farm, etc. They should have noted these items and given values for them in their record book. The total value for all such items (unless the equivalent cost was put in the till) should be entered at code 327 on the B schedule of the owner of the business only. If a husband or wife both supply themselves with produce from their shop, the value of these items should be combined and entered at code 327 in the same proportion as profit is shared.

4. Code 328 If the informant has two self-employed jobs, the interviewer should have recorded details of the less remunerative in the margin of the page. The net profit on an annual or annual equivalent basis (i.e. the same basis as code 326) from the subsidiary job should be entered at code 328 with period code 8 pre-printed. It therefore follows that where there are only 2 self-employed jobs the amount coded at 328 can never be more than the amount coded at 326. A check should also be made that details of the more remunerative job have been entered at codes A210 and A211 at Q9 and details of the less remunerative job at code A214.

Note that if there is only one self-employed job but this is subsidiary to an employee jobs, the profit from it should be recorded at code 326 and not 328.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

5. Code 313 If the informant has been working at his main self-employed job for twelve months or more nothing should be entered at this code. However if the informant started the job less than 12 months ago the amount arned as profit since he started should be entered (see also 326). If the informant has answered 37 or 38 the answers should be used to estimate this amount.

6. Code A226 Use the standard frame to code ending date of the most recent period for which figures are available. These may be given at 36(a), 37(d) (1) or 38(a). Leave blank if coded DK.

Code A227 Code number of months covered by period excluding the first month eg
December 1984 to December 1985 = 11 months NOT 12
April 1984 to Sept. 1984 = 5 months NOT 6

7. Code A203
One self-employed job only

More than 30 hours per week - code 10
30 hours a week or less - code 20

Two or more self-employed jobs.

Main job: more than 30 hours a week -] code 11
Sub job: more than 30 hours a week -]

Main job: more than 30 hours a week -] code 12
Sub job: 30 hours a week or less -]

Main job: 30 hours a week or less -] code 21
Sub job: more than 30 hours a week -]

Main job: 30 hours a week or less -] code 22
Sub job: 30 hours a week or less -]

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 41

SUBJECT. Expenditure claimed as a business expense for tax purposes by self-employed informants.

REFER ALSO TO Q 1 on page 20 D schedule, code 267 'A' schedule.

Only if Q36 is answered and actual percentages known at Q41, then the following action should be taken.

CODE.

At code 267 (page 39 A Schedule) enter annual expenditure after abatement on rent, mortgage, rates, water charges and structural insurance, where a 100% claim has been made.

At code 267 (page 39 A Schedule) enter annual expenditure after abatement on gas, electricity, oil for central heating, where a claim of 91% - 100% has been made.

POINTS TO NOTE

This question should not have been asked of people who have not been self employed for the last 13 weeks (ie. 13 week rule as for employers).

The purpose of this question is to enable the business element in any expenditure to be abated out of the A and D schedules. For this purpose "business expenditure" means expenditure claimed as a business expenses for tax purposes, unless 100% of expenditure on an item is claimed in which case different rules apply.

The question gives percentage claimed for tax on the following items:

- a. rent, mortgages, rates, water charges, structural insurance
- b. gas, electricity, telephone
- c. vehicle expenses.

Where amounts rather than percentages are given abate by these amounts. In the case of vehicle expenses and slot-meter payments for gas and electricity the information is used to abate both A and D schedule entries. Otherwise only A schedule entries are affected.

The interviewer may have recorded claims for other items at this question

- i. information referring to A schedule items should be used to abate them
- ii. if the information refers to D book items it should not be used for abatement. However it may suggest that certain D book entries are in fact business expenses which are claimed for tax, even though no entry has been made at page 20 of the D book. In that case the budget should be queried.

Where an entry on page 20 of one of the self-employed informant's D books refers to vehicle expenses, or slot-meter payments for gas or electricity, along with some

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

some other item, the vehicle or slot-meter expenses recorded in that D book should be abated by the percentage at Q41. The amount of abatement taken from these items should then be subtracted from the entry at page 20 and the balance used to abate the other items covered by the entry.

a. Rent, mortgage, rates, water charges, structural insuranceWhere less than 100% of expenditure on an item is claimed for tax

Abate the appropriate entries in the A schedule by the percentage given.

The rateable value at Q96 'A' Schedule should be abated by the same proportion as rates and rent payments.

In the case of claims of relief on mortgages, only claims for a business element should be used for abatement, the relief on mortgage interest that an individual not in business can also get does not count.

Water charges for agricultural establishments are usually too high for the usual method of abatement to result in a true domestic element.

Abatement should therefore be in two stages

- i. multiply Rateable Value by Water Rate poundage
- ii. abate the answer to (i) by the percentage at Q41 and enter the abated answer at the appropriate question.

Where 100% of expenditure on an item is claimed for tax

Different principles are applied to these cases, since expenditure that is really private would be deleted altogether if we followed the rules above and abated by the percentage claimed. Instead, expenditure is abated in ways described below to take out the business element.

These methods of abatement mean that some expenditure which is accepted as private and coded in the A schedule is paid for by the business. In effect this subsidy from the business is income that is not recorded in the B schedule. For rent, mortgage, rates, water charges and structural insurance, gas, electricity we record this 'hidden' income at code 267.

(See below).

a. Rent, mortgage, rates, water charges, structural insurance

- i. Mixed premises other than farms (eg shop/flat, house with rooms used for business).

The number of rooms used (or partly used) for business is given at Q12 or 13 on the A schedule. The number of rooms used for business (counting a room partly used for business as $\frac{1}{2}$ a room used for business) should be divided by the total number of rooms (that is "included" rooms, bathroom, garage, and rooms used entirely for business) shown at Q12 or 13 A schedule after coding. This percentage is used to abate relevant expenditure eg. if there is a total of ten rooms and one is used for business then expenditure is abated by 10% ie. 1/10th.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONF'D)

If no rooms are noted at Q12 or 13 as used, or partly used, for business, the number of rooms used for business should be referred for estimation which should take into account the type of business, profit, total number of rooms, composition of household by age and sex. The maximum number of rooms estimated should be two.

The rateable value at Q96 should be abated by the same proportion as rates and rent payments.

ii. Farms An abatement of 1/3rd should be made for rates, rateable value at Q96, and structural insurance.

Where rent or mortgage payments are shown separately for the farmhouse they should be abated by 1/3rd. If rent or mortgage payment includes farm buildings etc then GAV, abated by 1/3rd, should be substituted to cover domestic element. The Gross Annual Value should be shown at Q96, but if it has not been given it can be obtained from Table 2 which is based on the following formulae (effective from 1/4/74).

- | | | |
|--|---|---------------|
| 1. Where R.V. is £36 or less |] | with maximum |
| G.A.V. = RV X 1.81 |] | difference |
| 2. Where R.V. is £37-£80 |] | between GAV |
| G.A.V. = £13.57 + (R.V. X 1.43)] |] | and RV of £80 |
| 3. Where R.V. is £81-£247 |] | on 1, 2 or 3. |
| G.A.V. = (£26.68 + RV) X 1.2 |] | |
| 4. Where R.V. is over £247 (G.A.V over £327) | | |
| G.A.V = (£26.68 + RV) X 1.2 | | |

Water charges for farms should be abated in the way used when less than 100% is claimed - except that in the second stage abatement should be by 1/3rd.

iii. Code 267 Where a 100% claim is made on rent, mortgage, rates, water charges or structural insurance, the amounts of expenditure after abatement on the items covered are brought to an annual amount and totalled. This total is entered at code 267, page 39 on the A schedule, with period code 8 only if Q36 is answered. This represents the 'hidden' income received from the business.

eg a businessman pays a rent of £1000 a year, rates of £200 a year and water rates of £40 a year. He claims all of the rent and rates as a business expense but does not claim on the water rates. Two out of eight rooms are used for business.

Rent and rates after abatement are £750 and £150 respectively. Water rates are not abated. £900 = £750 + £150 (the amounts, after abatement, paid for the items covered by the 100% claim) is entered at code 267.

ADDITIONAL NOTES (give date and reference)

TABLE OF NET RATEABLE VALUES AND EQUIVALENT GROSS VALUES

RV	GV	RV	GV	RV	GV	RV	GV	RV	GV	RV	GV
£	£	£	£	£	£	£	£	£	£	£	£
31	57	71	115	111	165	151	213	191	261	231	309
32	59	72	117	112	167	152	215	192	263	232	311
33	60	73	118	113	168	153	216	194	264	233	312
34	62	74	120	114	169	154	217	194	265	234	313
35	64	75	121	115	170	155	218	195	266	235	314
36	65	76	122	116	171	156	219	196	267	236	315
37	67	77	124	117	173	157	221	197	269	237	317
38	68	78	125	118	174	158	222	198	270	238	318
39	70	79	127	119	175	159	223	199	271	239	319
40	71	80	128	120	176	160	224	200	272	240	320
41	72	81	129	121	177	161	225	201	273	241	321
42	74	82	131	122	179	162	227	202	275	242	322
43	75	83	132	123	180	163	228	203	276	243	323
44	77	84	133	124	181	164	229	204	277	244	324
45	78	85	134	125	182	165	230	205	278	245	325
46	80	86	135	126	183	166	231	206	279	246	326
47	81	87	137	127	185	167	233	207	281	247	327
48	82	88	138	128	186	168	234	208	282		
49	84	89	139	129	187	169	235	209	283		
50	85	90	140	130	188	170	236	210	284		
51	87	91	141	131	189	171	237	211	285		
52	88	92	143	132	191	172	239	212	287		
53	90	93	144	133	192	173	340	213	288		
54	91	94	145	134	193	174	241	214	289		
55	92	95	146	135	194	175	242	215	290		
56	94	96	147	136	195	176	243	216	291		
57	95	97	149	137	197	177	245	217	293		
58	97	98	150	138	198	178	246	218	294		
59	98	99	151	139	199	179	247	219	295		
60	100	100	152	140	200	180	248	220	296		
61	101	101	153	141	201	181	249	221	297		
62	102	102	155	142	203	182	251	222	299		
63	104	103	156	143	204	183	252	223	300		
64	105	104	157	144	205	184	253	224	301		
65	107	105	158	145	206	185	254	225	302		
66	108	106	159	146	207	186	255	226	303		
67	110	107	161	147	209	187	257	227	305		
68	111	108	162	148	210	188	258	228	306		
69	112	109	163	149	211	189	259	229	307		
70	114	110	164	150	212	190	260	230	308		

POINTS TO NOTE (CONT'D)

Where the percentage of expenditure claimed for tax on an item is not known

This situation arises when an informant states that he is claiming business expenses but does not know the amount. Rent, mortgages, rates, water charges and structural insurance should be treated as a 100% claim and abated on the basis of the number of rooms used for business (or as described at (a1) above for a farm). Abated expenditure should not be entered at code 267.

Where no rooms are recorded as used for business at Q12 the budget should be checked with the informant. If the informant does not reply, the number of rooms used for business should be estimated by the procedure described above for mixed premises.

b. Telephone

Where less than 100% of expenditure is claimed for tax

Abate by the percentage given at Q41.

Where 100% of expenditure is claimed for tax

Abatement should be according to the number of rooms used for business in the same way as at (a1) above (or by 1/3 in the case of a farm (see a11)). Rebates should be abated in the same proportion as payments.

Where the percentage of expenditure claimed for tax is not known abate by 66 2/3%

NB Abated telephone expenditure is not entered on 'A' schedule at code 267

c. Fuel expenditure (Gas, Electricity and Central Heating oil)

Where 90% or less of expenditure is claimed for tax

Abate by the percentage claimed.

Where 91% or more is claimed for tax

Abate by 90% in all cases. The total annual expenditure AFTER abatement should be entered at code 267 on page 39 of the A Schedule with period code 8 if Q36 has been answered.

Where the percentage of expenditure claimed for tax is not known

Treat as 100% claims and abate on the basis of the number of rooms used for business (or by 1/3 in the case of a farm). Abated expenditure should not be entered at code 267 for 'don't know' cases.

d. Vehicles

Where less than 100% of expenditure is claimed for tax

Expenditure on all entries referring to vehicles should be abated. This includes rent and rates of a garage where these are paid separately (if two or more members of H/H receive vehicle allowances the payment at Q14, A Schedule should be split between them for abatement purposes).

POINTS TO NOTE (CONT'D):

Where 100% of expenditure is claimed for tax

All the self-employed informant's entries concerning expenditure on cars in the A and D schedules are deleted. In other words all this expenditure is considered to be business expenditure, not private expenditure subsidised by the business. (This means that there is assumed to be no 'hidden' income so there is no need for a code to record it).

Refund of vehicle licence at Q67, and sale of vehicles Q66 A schedule, should be deleted in same manner.

Where the percentage of expenditure is not known

Car expenditure should be abated by 1/3rd. The abated expenditure should not be entered at code 267.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 42

SUBJECT Expenses refunded by an organisation for which the informant does unpaid work.

REFER ALSO TO Q: 1 on page 20 of the D schedules.

CODE

The amounts given at this question are used to adjust entries at certain codes in the A and D schedules.

POINTS TO NOTE.

Where the informant has stated what is covered by the allowance this should be used to abate A (and sometimes D) schedule entries in the same way as a comparable allowance at questions 26-29. In particular, except in the case of car allowances and slot meter payments, entries at this question should not be used to abate D book items - which should in general be abated on the basis of entries at page 20 (D schedule). However entries at this question may suggest that certain items in the D records are covered by an allowance/refund even if this has not been noted on page 20. In that case the budget should be queried.

Where the informant has not stated what is covered the budget should be referred.

An honorarium should be transferred to Q86 and entered at code 381.

The purpose of sub-question (b) is to confirm that the entry does cover unpaid work, by identifying the type of organisation.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 43

SUBJECT: Regular National Insurance Contributions by people who are not employees

REFER ALSO TO Q: 89

CODE: _____

At 336 code the regular amount of National Insurance contributions paid by self-employed and non-employed.

POINTS TO NOTE:

All employed and self-employed persons (earning more than specified minimum amounts) are required to pay a National Insurance contribution and some non-employed persons may also do so.

The amount to enter at code 336 is the total, brought to the same time period if necessary, of the following amounts:

- a. Flat rate contributions only, paid on main and subsidiary self-employed jobs,
- b. Regular voluntary contributions paid as a non-employed person.

If a self-employed person pays their regular (ie. class 2) contribution as a lump sum, the interviewer may enter it at Q89. In this case the amount excluding percentage based on profits and adjusted to an appropriate time period, should be transferred to this question.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. B

Q. 44-65 GENERAL NOTES

SUBJECT Social Security Benefits

REFER ALSO TO Q

CODE. _____

POINTS TO NOTE

1. The interviewer's entry at these questions should exclude Supplementary Benefit and should normally be accepted. These means that an amount at a question should only cover the benefits mentioned at question.
2. It is no longer necessary to check the amounts given informants at certain Benefit questions. However checking is still necessary at other Benefit questions. The following table shows the procedure at each Benefit question.

<u>Do not check amount</u>	<u>Check amount</u>
Q44 (code 337)	Q45 (code 338)
Q46 (' 339)	Q49 (' 418)
Q47 (' 340)	Q52 (' 388)
Q48 (" 317)	Q53 (' 363)
Q50 (" 421)	Q54 (' 369)
Q51 (' 323)	Q58 (' 362)
Q51 (' 324)	Q60 (' 365)
Q56 (' 382)	
Q57 (' 325)	
Q59 (' 368)	
Q61 (' 341)	
Q62 (' 406)	
Q64 (' 407)	
Q65 (' 367)	
Q66 (' 394)	

The checks are carried out for the following reasons

1. To ensure that the amount has not been set against the wrong benefit eg. Non-contributory Invalidity benefit entered against Contributory Invalidity benefit.
11. That supplementary benefit has not been included.

The only case where Appendices should be used to change the original amount is where an interviewer notes that an informant had difficulty. However Appendices should be used to impute missing amounts.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

3. At each question the interviewer will indicate which benefit(s) were received. This information is not coded - it is recorded to make editing easier.
4. Where benefits are for a maximum period eg sickness benefit, the number of weeks benefit received should be checked to ensure that maximum has not been exceeded.
5. The following notes on the benefits asked for at each question should be supplemented by the information in social security leaflets.
6. Reference should be made to other relevant benefits where necessary to clarify individual situations.
7. Informants are asked for their last payment of benefit received and the period covered, as benefits can now be received for other than weekly periods. This means that the period must be coded. NB. the period must be a week or multiples of a week, eg. 4 weeks, 13 weeks.
8. Qs 61-63 are asked of women aged under 51 only.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 44

SUBJECT Childs benefit, one parent benefit

REFER ALSO TO Q page 1 A schedule

CODE:

At 337 code amount last received and period.

POINTS TO NOTE

See general notes on Qs 44-65.

Child's benefit will normally be entered in the Mother's column but it can appear in the Father's column.

One parent benefit is paid to single parents whatever the reason for them being a single parent provided that they are not receiving widow's benefit and certain other benefits.

It is no longer necessary to check and change original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

SUBJECT: NI. retirement pension, old person's pension

REFER ALSO TO Q: page 1 A schedule

CODE: _____

At 338 code amount last received and period.

POINTS TO NOTE: See the general notes on Qs 44-65.

Where a husband and wife are both over their respective retirement ages and therefore receive separate pensions, each pension should be entered separately at code 338 in the columns for husband and wife respectively. Where the wife is under the normal retiring age for a woman (ie. 60 years) and the husband receives an increase in his pension in respect of his wife, then the total pension should be entered at code 338 in the column for the husband.

Pension can include a graduated amount (additional pension) as well as a basic flat rate amount.

Allowance for Job Release Scheme should be entered at Q65.

At retirement age a person who is receiving Invalidity Pension can continue to receive this (up to 70 if man, 65, if woman) if it is higher than the Retirement Pension they would have been entitled to. If they decide to take Retirement Pension Invalidity Allowance will continue as part of this.

Where the recorded recipient of pension at Q45 is NOT the H.O.H., the amount recorded at 338 should be checked to see if it equals the non-householder Supplementary Benefit scale rate. If it does then it should be assumed to be Supplementary Benefit and transferred to Q60.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 46

SUBJECT NI Widow's benefits

REFER ALSO TO Q 6 A schedule, Q65 B schedule

CODE _____

At 339 code the amount last received and period.

POINTS TO NOTE.

See the general notes on Qs 44-65.

All forms of widow's National Insurance benefits, should be entered at this question, ie code 339.

NI Widows benefits comprise Widows allowances, Widowed mothers allowance or Widows pension.

War Widows Pension should be shown at Q65.

It is no longer necessary to check amounts given by informants against Appendix C.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 47

SUBJECT: War disability pension, related state allowances

REFER ALSO TO Q: 65

CODE: _____

At 340 code the amount last received and period.

POINTS TO NOTE:

See the general notes on Qs 44-65.

A War Disability Pension or Allowance is paid to people who were disabled either through war service or because of injuries received as a civilian due to enemy activities. It can be paid to a person whether or not he/she is working but it is subject to periodic review by the authorities when the amount paid might be adjusted. As the pension/allowance received is variable, the amount shown at Q47 should be accepted. Again any extra benefits should be included with the War Disability pension. Only benefits paid to the person actually suffering the war disability should be entered at this question.

War widows pension should be shown at Q65.

It is no longer necessary to check amounts given by informants against Appendix C.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. B

Q. 48-50

SUBJECT Mobility allowance, non contributory invalidity pension, housewives non-contributory invalidity pension, severe disablement allowance, attendance allowance.

REFER ALSO TO Q.

CODE

1. At 417 code the amount of mobility allowance last received and period.
2. At 418 code the amount of non-contributory invalidity pension or housewife's non-contributory invalidity pension, severe disablement allowance last received and period.
3. At 421 code the amount of attendance allowance last received and period.

POINTS TO NOTE

See the general notes on Qs 44-65.

Mobility allowance is a benefit for disabled people. Invalid tricycles also continue to be available instead of the allowance for those who prefer them. This should not be mistaken for MOTABILITY which is a payment for car hire/purchase by disabled people. There is no provision for MOTABILITY on schedules but if interviewer has made a note that payments are made to that organisation the following action should be taken

1. Ensure an amount for Mobility Allowance is entered at Q48.
2. Treat any expenditure on MOTABILITY as normal motoring expenditure in 'A' or 'D' schedule.

Non-contributory invalidity pension (November 1984 - November 1985) is primarily a benefit for people of aged 35-49 (other than married women who can receive housewives non-contributory invalidity pension) who have not been able to work for some time, but who do not qualify for much sickness or invalidity benefit because they do not have enough national insurance contributions. See also severe disablement allowance.

Housewives non-contributory invalidity pension (November 1984 - November 1985) is a benefit for housewives aged 35-49 of working age who because of sickness, etc. are unable to do paid work or normal household duties and who, because they have no national insurance qualification, cannot receive any other benefit. See also severe disablement allowance.

Severe disablement allowance. Paid to people aged 16-34, and 50 to retirement age who cannot work because of long term sickness and who do not qualify for Contributory Invalidity pension.

N.B This benefit started in November 1984 and for those aged 16-34, 50 to retirement will run until November 1985. It will then replace non-contributory invalidity pension etc. for those aged 35-49 and become one benefit.

Non-contributory, housewives non-contributory invalidity pension, severe disablement allowance should be checked to ensure that the amount is not contributory invalidity pension (Q54).

Attendance allowance is payable to an adult who is in need of constant attendance or to the parents or guardian of a child in need of constant attention. The amount of attendance allowance does not vary according of financial circumstances.

ADDITIONAL NOTES (give date and reference)

271

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 51

SUBJECT: Housing Benefit / Housing Benefit supplement

REFER ALSO TO Q: 17, 21, 28 & 29 'A' Schedule

CODE:

At 323 code last payment of housing benefit and period

At 324 code last payment of housing benefit supplement and period

POINTS TO NOTE:

See the general notes on Q44-65

This is a new question for 1985. It should be asked of all spenders except the HO. The HOH will have been asked the question on the household schedule

Delete H.O.H's data if entered.

Do not check amounts. Impute amounts if informant did not know the amount.

See Q17 household schedule notes for details of housing benefit.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 52

SUBJECT. STATUTORY SICK PAY

REFER ALSO TO Q 1, 10-23

CODE.

At A278 code number of weeks benefit received in last 12 months.

At 388 code last full gross payment and period.

At 279 code '1' if benefit received at present.

POINTS TO NOTE

See the general notes on Qs 44-65.

The benefit is paid to employees by their employer for a maximum period of eight weeks in a tax year. It is replaced in ninth week by NI sickness benefit.

Gross payment is payment before deductions for tax and NI.

The amount of benefit to be paid will be at flat rates.

For 1985 we are no longer recording details of net statutory sick pay.

Informants are no longer asked the amount of gross SSP that they receive. This should be imputed from Appendix C using the informants usual pay as a reference.

As the payment is paid for eight weeks in a tax year it is possible to have up to 16 weeks benefit in a twelve month period covering two tax years.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 53

SUBJECT: NI Sickness Benefit,

REFER ALSO TO Q: 1, 3

CODE:

At A224 code the total number of weeks benefit received in the last 12 months.
At 363 code the last payment received and period.
At A225 code "1" if benefit received at present.

POINTS TO NOTE: See general notes on Qs 44-65.

A "1" should be entered at A225 if sickness benefit is currently being received. Whenever this benefit is shown as currently being received the informant should currently not be working and a "1" should have been coded at A207 at Q3. Of course it is possible that a person is working but is not revealing the fact to the authorities.

Industrial Injury benefit is no longer paid.

Sickness benefit is normally replaced by an invalidity pension after 20 weeks.

The amount received should be checked with Appendix C.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 54

SUBJECT Contributory invalidity pension, invalidity allowance

REFER ALSO TO Q 1, 3

CODE

At A258 code the total number of weeks benefit received in the last 12 months.

At 369 code the last payment and period.

At A259 code '1' if benefit received at present.

POINTS TO NOTE

See also the general notes on Qs 44-65.

Contributory invalidity pension and allowance. Invalidity pension normally replaces sickness benefit after 20 weeks. Invalidity allowance is paid in addition to invalidity pension and the amount paid depends upon age of recipient at time invalidity commenced. At retirement age invalidity pension is replaced by retirement pension, unless it is more beneficial to receive invalidity pension, invalidity allowance continues combined with retirement pension or invalidity pension.

Additional pension is paid with Invalidity Pension.

See notes on Retirement Pension (Q45).

Ensure that contributory invalidity pension is not confused with the two non-contributory pensions, statutory sick pay or NI sickness benefits by checking amounts.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 55

SUBJECT: Payments by employer while in receipt of sickness benefit,
industrial injury benefit or contributory invalidity benefit.

REFER ALSO TO Q: 52, 53 & 54

CODE: _____

1. At A272 whether paid every week (1) or for some weeks (2)
 2. At A267 number of weeks paid.
-

POINTS TO NOTE:

This question should only be answered by those answering "Yes Y to 51, 52
or 53"

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q 56

SUBJECT Government training schemes

REFER ALSO TO Q. 1

CODE.

At A246 code training course attended
At A249 code number of weeks on training scheme in last 12 months
At 382 code last payment of allowance and period.
At A273 code '1' if allowance being received at present.

POINTS TO NOTE:

This question applies only to government training schemes where an allowance is paid.
If a wage was paid delete entry.

The following is a list of government schemes and the form of remuneration

<u>SCHEME</u>	<u>REMUNERATION</u>
UNITED VOCATIONAL PROGRAMME	WAGE
TRAINING FOR SKILLS PROGRAMME	WAGE
YOUNG WORKERS SCHEME	WAGE
TEMPORARY SHORT TIME	
WORKING COMPENSATION SCHEME	WAGE
COMMUNITY PROGRAMME	WAGE
ACTION FOR COMMUNITY EMPLOYMENT (NI)	
YOUNG TRAINING SCHEME	ALLOWANCE
YOUTH TRAINING PROGRAMME (NI)	
TRAINING OPPORTUNITIES SCHEME	ALLOWANCE
COMMUNITY INDUSTRY PROGRAMME	ALLOWANCE

If at time of interview informant is on scheme the number of weeks completed should be entered at A249.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 57

SUBJECT: Industrial injury disablement pension

REFER ALSO TO Q: 65

CODE:

At A205 code the total number of weeks benefit received in last 12 months.
At 325 code the last payment and period.
At A238 code "1" if benefit received at present.

POINTS TO NOTE:

Usually a Disablement Pension replaces an Industrial Injury Benefit after 26 weeks, if the effects of the injury last longer than 26 weeks. The pension can be received by a person who is working full-time, part-time, or who is not working at all. The amount received varies with the degree of disablement and therefore it is not possible to check that the correct amount has been shown at Q57. The maximum basic rate of benefit is shown in Appendix C. ANY extra benefit associated with Disablement benefit should be included at code 325 (eg hardship allowance, unemployment/supplement, constant attendance allowance, hospital treatment allowance).

Industrial widows benefit should be entered at Q65.

It is no longer necessary to check and change original amounts given by informant.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 58

SUBJECT Unemployment Benefit

REFER ALSO TO Q 1 and 56

CODE

At A222 code the total number of weeks benefit received in last 12 months.

At 362 code the last payment and period.

At A223 code 1 if benefit received at present.

POINTS TO NOTE See general notes on Os 44-65

In most cases information given at this question will correspond to the coding at Q1 so that if a person is shown as unemployed at Q1 he will probably (but not necessarily) be shown as currently receiving unemployment benefit at Q58 and vice versa. However, not all persons unemployed according to the FES definition claim benefit, and they may in fact earn some money (they are allowed to earn a specified amount but may earn more than this and simply not reveal the fact to the authorities).

The rates of unemployment benefit, including the earnings related short-term supplement, for various classes of persons are shown in Appendix C

The number of weeks for which benefit received (A222) will normally be less than the number of weeks unemployed (Q4).

From April 1982 any tax chargeable against unemployment benefit should have been stopped from wages after return to work.

Amounts at this question should be checked against Appendix C.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 59

SUBJECT: Family income supplement

REFER ALSO TO Q: 2 'A' Schedule

CODE:

At A256 code the total number of weeks benefit received in last 12 months.

At 368 code the last payment and period.

At A257 code "1" if benefit received at present.

POINTS TO NOTE: See general notes on Qs 44-65.

To obtain FIS there must be at least one dependent child in family.

It is no longer necessary to check and change original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 60

SUBJECT Supplementary benefit (including Supplementary Pension and Supplementary allowance)

REFER ALSO TO Q 44-59

CODE. ---

At A228 code the total number of weeks for which benefit received in last 12 months before interview.

At 365 code the last payment and period.

At A229 code '1' if benefit being received at time of interview.

POINTS TO NOTE.

See general notes on Qs 44-65.

This question is intended to identify and record separately from other NI benefits, receipt of any supplementary benefit, including supplementary pension.

There are two kinds of supplementary benefit. supplementary pension for people over retirement age (65 for men, 60 for women) and supplementary allowance for people from age 16 to retirement age.

Nb. Informants have been asked at questions 44-59 to give amounts excluding Supplementary Benefit. These excluded amounts should have been shown at this question.

As well as paying benefits to the informant the Supplementary Benefit Commission sometimes pays for certain items of expenditure on his behalf. Where the interviewer has noted that an item of A schedule expenditure is partly or entirely paid for the informant by the SBC, the full amount paid (including the amount paid by the SBC) should be coded at the A schedule question. The amount paid by the SBC should also be included in the amount you code at code 365. If the interviewer has not made notes explaining whether or not she has included it the budget should be referred.

For men aged 60 or over the higher Supplementary Benefit rate is paid if they are unemployed and agree not to register for work.

From April 1982 any tax chargeable against supplementary benefit should have been stopped from wages after return to work.

Please continue to check original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 61

SUBJECT: Maternity allowance (ASKED OF WOMEN AGED UNDER 51 ONLY)

REFER ALSO TO Q: 4 A schedule

CODE:

At A239 code the total number of weeks benefit received in last 12 months.

At 341 code the last payment and period.

At A240 code "1" if benefit received at present.

POINTS TO NOTE:

See general notes on Qs 44-65.

Maternity benefit is of two kinds:

- a. A maternity grant is paid for each birth (including some stillbirths). In the case of twins, triplets etc a grant is paid for each child who lives more than 12 hours (at least one grant is always paid). The grant is payable in nearly all cases of confinement although there are exceptions where contribution conditions have not been satisfied. This should be entered at Q62.
- b. In addition to the maternity grant, a maternity allowance may be paid to mothers who were working and paying full national insurance contributions at some time during the 15 months before the baby was born. This allowance is normally paid for 18 weeks starting with the 11th week before the week in which the baby is expected.

It is possible for maternity grant and maternity allowance to be received even though there are no children aged less than 1 year in the household. The child may be out of the household OR the benefit is being received prior to the birth of the child.

It is no longer necessary to check and change original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 62

SUBJECT NI Maternity grant (Asked of women aged under 51 only)

REFER ALSO TO Q 61 & 63 and 4 'A' schedule.

CODE

1. at 406 code amount of NI Maternity grant received in the 12 months before interview.

POINTS TO NOTE

See general notes on Qs 44-65.

A maternity grant is paid for each birth (including some stillbirths). In the case of twins, triplets etc a grant is paid for each child who lives more than 12 hours (at least one grant is always paid). The grant is payable in nearly all cases of confinement although there are exceptions where contribution conditions have not been satisfied.

It is possible that maternity grant has been received even though there are no children aged less than one year in the household. The child may be out of the household OR the benefit is being received prior to the birth of the child

It is no longer necessary to check and change original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 63

SUBJECT. MATERNITY PAY (ASKED OF WOMEN AGED UNDER 51 ONLY)

REFER ALSO TO Q. 61 & 62 and 4 'A' schedule

CODE:

At A274 code '1', if Maternity pay has been received in the 12 months before interview.

POINTS TO NOTE:

This question refers only to pay received under the Employment Protection Act. Under this act a woman having a baby who normally works for her employer eight hours a week or more and has worked continuously for at least the previous two years is entitled to this pay from her employer so long as she continues working up to the 11th week before the baby is due.

Payment is in cash, for the first six weeks after the woman stopped work.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES JAN 85

SCHEDULE B

Q 64

SUBJECT DEATH GRANT

REFER ALSO TO Q

CODE

At 407 code amount of NI Death Grant received in the last 12 months before interview.

POINTS TO NOTE

On the death of an adult or child a death grant may be payable, subject to contribution conditions being satisfied, to the person paying funeral expenses or to the next of kin. No grant is payable for the death of a person over normal retirement age on 5th July 1948 and a reduced grant is paid for the death of a person who was within 5 years of retirement age on 5th July 1948.

It is no longer necessary to check and change original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 65

SUBJECT: NI or State Benefits not mentioned at previous questions
(INCLUDES JOB RELEASE ALLOWANCE)

REFER ALSO TO Q:

CODE:

At A232 code the total number of weeks for which benefit received.

At 367 code the last payment and period.

At A233 code "1" if benefit being received at time of interview.

POINTS TO NOTE:

See general notes on Qs 44-65.

A "1" should be entered at code A233 if any National Insurance or State Benefit not covered by previous questions is currently being received. Eg. War Widows pension, War dependents pension, War clothing allowance, Disabled persons petrol allowance, Industrial death benefit, Childs special allowance, Guardian allowance, Invalid care allowance, Job release allowance.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE. B

Q 66

SUBJECT Christmas Bonus

REFER ALSO TO Q 44-60

CODE

At 394 code the total Christmas bonus received in 12 months before interview.

POINTS TO NOTE

It is no longer necessary to check and change original amounts given by informants.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 67

SUBJECT: Redundancy payment under Redundancy Payments Act

REFER ALSO TO Q:

CODE:

At 356 code lump sum payment received in the last 12 months.
At 357 code amount received per completed year of service.

POINTS TO NOTE:

Under the Redundancy Payments Act of 1965, a lump sum payment may be paid to certain persons in the event of their being made redundant. This payment can only be made to persons who have completed at least 2 years service with the firm since their eighteenth birthday. Therefore it is only payable to persons who are aged 20 or over.

The amount of the payment depends upon the age of the person when he is made redundant, the number of completed years service (over the age of 18) with the firm (with a maximum of 20 used for the calculation) and the weekly earnings at the time of redundancy (with a maximum of £100 used for the calculation).

The redundancy payment is calculated on the following basis:

1. For each year between 18 and 21 inclusive, half a week's pay per year of service.
2. For each year between 22 and 40 inclusive, one week's pay per year of service.
3. For each year between 41 and 64 inclusive, one and a half week's pay per year of service.

Example: For a man aged 62 with twenty five years of service his last twenty years would count, ie 20 years x 1½ weeks pay. If he earned £145 per week on redundancy he would receive:

$$20 \times 1\frac{1}{2} \times £145 = £4,350$$

The amount of redundancy payment should be divided by the number of completed years of service with the firm (ie. 3½ years counts as 3 years) and the resulting average figure should be entered at code 357. Where more than 20 completed years of service are shown the amount should still be divided by 20.

If payment is more than £4350 refer to R0.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D)

On occasions the interviewer may have noted that a severance payment or money in lieu of notice has been received.

1. Severance pay or money in lieu of notice is paid for loss of office and is not covered by the Redundancy Payment Act.
2. The payment is normally in the form of a lump sum but reference is usually made to the period of compensation eg month, three months.
3. In some large industries (eg coal mining) the payment is made on a weekly basis to those near retirement age. In such cases it should be treated as a pension.

State as an employer

Lump sum payments from the State as an employer should be deleted as windfall unless Redundancy Payment.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 68

SUBJECT: Various non-State benefits

REFER ALSO TO Q: 70

CODE:

At A230 code the total number of weeks for which benefit received in last 12 months before interview.

At 366 code the last payment and period.

At A231 code "1" if benefit being received at time of interview.

POINTS TO NOTE:

A "1" should be entered at code A231 if temporary Trade Union or Friendly Society benefits are currently being received. However, where the benefit is of a permanent nature it should be regarded as a pension and entered at code 366 in the 21st column.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 69

SUBJECT. Pension from previous employers

REFER ALSO TO Q. 73

CODE

Net Pension amounts, deducted Income Tax and a code indicating whether the informant has the pension in his own right (code 3) or from his or her spouse (code 4 this will normally apply only to widows) should be coded as follows.-

<u>Public Sector</u>	<u>Code</u>
*Last net of tax, payment of Pension	342
Tax deducted, if any	343
Whether own or spouse	A236
 <u>Private Sector</u>	
*Last net of tax, payment of Pension	344
Tax deducted, if any	345
Whether own or spouse	A237

*See the asterisked note below about payments where tax has not been deducted at source.

POINTS TO NOTE

Special care is needed while transferring information related to a specific person to see that it is entered in the correct column for that person.

Each pension is to be classified according to whether it is paid by the Public sector or the Private sector. All entries in Q69(a) or (b) should be in the Public sector since they should relate to previous employer ie. Central Government, Local Government, Armed Forces.

Entries in Q69(c) may relate to pensions in either the Public or Private sector. Nationalised industries such as National Coal Board, Gas and Electricity Boards are in Public sector but so are many smaller organisations. See Appendix E. Any public sector pensions at this question should be transferred to 69(a) or (b). Doubtful cases should be referred to supervisor.

See Q73 for deductions other than tax. This is new in 1985

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

If one informant has several pensions, each is to be classified under Public or Private sector, and the total amount in each sector entered in the appropriate boxes.

The coding of A236 or A237 should not present a problem since code 3 or 4 applies to the individual and usually both cannot apply at the same time. In the unusual case of a conflict eg. a widow who gets one pension in her own right from her former employer in the Public sector and also a pension as a widow from her husband's former employer in the Public sector, enter code 3 or 4 according to whichever pension is the larger.

If the last payment is shown as "before tax" and an amount of tax deducted at source is shown, then the tax should be subtracted from the last payment and the resulting net figure and tax coded separately.

*If no tax was deducted at source, then the amount shown as last payment should be coded and the tax code left blank.

Pensions from overseas governments or companies should be treated as unearned income and entered at code 384 (page 37) if in foreign currency, but accept at Q69(a) or (b) if sterling.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 70

SUBJECT Pensions as Member of Trade Union or Friendly Society

REFER ALSO TO Q 1

CODE

At 344 code the last payment and period covered.

POINTS TO NOTE

This is pension as member of trade union or friendly society, NOT as employee.

Note that questions regarding tax are not asked in relation to this income.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 71 and 72

SUBJECT: Annuities and payments from trusts or covenants

REFER ALSO TO Q:

CODE:

Coding of amounts from 'Annuity' or 'Trust' or 'Covenant' and tax deducted should be as follows:-

<u>Annuities</u>	<u>Code</u>
*Last net payment	346
Tax deducted, if any	347
 <u>Trust or Covenant</u>	
*Last net payment	346
Tax deducted, if any	347

*See the asterisked note below about payments where tax has not been deducted at source.

POINTS TO NOTE:

If the last payment is shown "before tax" and an amount of tax deducted at source is shown, then the tax should be subtracted from the last payment and the resulting net figure and tax coded separately.

*If no tax was deducted at source, then the amount shown as last payment should be coded and the tax codes left blank.

ADDITIONAL NOTES (give date and reference)

SUBJECT OTHER DEDUCTIONS FROM PENSION AT Q69

REFER ALSO TO Q 69

CODE

At 351 code total amount of other deductions

POINTS TO NOTE -

This is a new question for 1985. The other deductions could include BUPA, PPP, SAYE etc.

Where a deduction has been made at source and the last pension payment at Q69 was after deduction then the amount should be added back to the pension to give a pension net only of tax.

The deductions should also be treated as an item of expenditure and transferred to 'A' or 'D, schedule as well as being coded at 351. See Q16 on deductions from salary and treat in the same way.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 74 and 75

SUBJECT: Interest from NSB, TSB, Building Society,
High Street Banks and other savings banks or societies

REFER ALSO TO Q:

CODE:

1. At 269 code accounts held. See code frame below.
2. At 373 annual income from National Savings Ordinary Savings Account.
3. At 333 annual income from National Savings, Investment Account.
4. At 371 annual income from Trustee Savings Bank.
5. At 376 annual income from Building Society.
6. At 374 annual income from high street bank or other savings accounts.

POINTS TO NOTE:

Amounts at 373, 333, 371 and 374 are gross. Amount at 376 is net.

Tax is deducted from Building Society interest at source and code 376 is therefore net. When estimating basic liability, reference should be made to Daily Mail Income Tax Guide for method of treatment.

Where interest is not known but amount deposited has been noted, estimate interest at current rate.

Impute from investment tables if amount not known.

Code A260 is new for 1985.

Use the following code frame for code A260

	<u>Code</u>
National Savings Bank Ordinary Account.....	1
" " Investment Account	2
TSB	3
Building Society	4
High Street Bank	5
Any other savings banks or societies	6
Combinations of :	
1 & 2	7
1 & 4	8
1 & 5	9
2 & 4	10
2 & 5	11
4 & 5	12
1, 2 & 4	13
1, 2 & 5	14
1, 4 & 5	15
2, 4 & 5	16
1, 2, 4 & 5	17

Additional codes will be issued with the agreement of DNS and DE.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 76

SUBJECT Investment in National Savings Certificates, Save As You Earn, Premium Bonds, National Savings Income Bonds and National Savings Deposit Bonds

REFER ALSO TO Q.

CODE

At A218 code type of investment (see code list below)

At A284 code 1 - 13 according to total investment held by spender.

At A261 code 1 - 13 according to total investment held by child under 16.

POINTS TO NOTE

The code to be entered at A284 should be that for total investment held by spender.

The code to be entered at A261 should be that for total investment held by child under 16. Enter in column for child's parent.

When entering the totals for A284 and A261 it will be necessary to add the totals of investments for each person. When doing this use the mid point value of the ranges.

EXAMPLE

If P1 has £501-1000 invested in NSC and £1-50 in premium bonds then add £750 to £25 to give £775 which is code 5. Enter code 5 at A284.

When coding A 218, only the following codes or combinations of these codes need be entered at A218

Index linked National Savings Certificates	1
Other National Savings Certificates	2
Premium Bonds	5
National Savings Income Bonds	6
Combinations of above.-	
1 & 2	7
1 & 5	8
1 & 6	9
2 & 5	10
2 & 6	11
5 & 6	12
1, 2 & 5	13
1, 2 & 6	14
1, 5 & 6	15
2, 5 & 6	16
1, 2, 5 & 6	17

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 77 & 78

SUBJECT: Interest, dividends and rent

REFER ALSO TO Q: 13 'A' schedule

CODE: _____

1. at 408 annual income from British Savings Bonds and War loan (Q77(a)).
2. at 378 annual income from stocks, shares, bonds, debentures and local authority securities etc. (Q77(c), unit trusts (Q77(a))).
3. at 360 annual income from property (including sub-letting) (Q78).

POINTS TO NOTE:

1. Amounts at 360 include income from sub-letting.
2. Where interest is not known but amount deposited has been noted estimate interest at current rate.
3. Rent may be abated because of sub-tenants payment of part of landlords expenses eg gas, electricity and rates. See notes at 'A' schedule Q13 etc.
4. Impute from investment tables if amount not known.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 79

SUBJECT A regular allowance from a friend or relative outside the household, a regular allowance from an organisation, maintenance allowance, or separation allowance, an allowance from a local authority or any other source for a foster child. EEC Training allowance

REFER ALSO TO Q 81

CODE

At 352 code the last payment

POINTS TO NOTE

New for 1985 EEC Training Allowance. This is paid to people made redundant in large numbers from a 'dying' industry eg steel, coal.

This question relates only to monies received by the household. It does not refer to direct payments of bills, etc. on behalf of the household by individuals in other households (see Q82).

This question relates to allowances from persons in the armed forces, merchant navy, divorced or separated spouses. Allowances from a spouse not a member of the household or who is an absent spender should not be included at this question (See Q80)).

Where alimony or separation allowance is not paid regularly a weekly equivalent based on amounts actually received and noted by interviewer should be entered.

Any income received at Q81 should be added to code 352.

Past situation in last twelve months accepted at this question.

Exclude regular allowance from spouse who is temporarily not a member of household (see Q80).

Exclude educational grants which should be entered at 392.

Include payments from the EEC social fund paid to ex-workers. These are allowances for resettlement etc when changing home on obtaining a new job.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 80

SUBJECT. Allowances received from a spouse who is not a member of the household or who is an absent spender.

REFER ALSO TO Q: 5, 8 A schedule

CODE: _____

At 385 code the amount of the allowance.

POINTS TO NOTE:

1. If the respondent gives full details of pay or a reasonable estimate or pay for absent spender.
 - a. Code income at Qs 10 - 16, 31 - 34, 36 - 38 and 86.
 - b. Do not code allowance at 80.
2. If pay details are not available or respondent can only guess.
 - a. Do not code anything at 10 - 16, 31 - 34, 36 - 38 or 86.
 - b. Code allowance at 80 at 385.
3. If the allowance entered at 385 in more than five times the average normal weekly wage or salary the budget should be referred. For 1985 the average normal weekly income is £99.00. Five times this figure is £495. This figure is to be updated annually from Table 23 of the FES report.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 81

SUBJECT Money received regularly from someone outside household to pay for items of expenditure.

REFER ALSO TO Q RELEVANT EXPENDITURE QUESTIONS

CODE

Income received at this question should be coded as an allowance at code 352 (Q79).

POINTS TO NOTE

Any items listed at this question should be accepted as expenditure by sampled household and entered at appropriate expenditure question.

The monies received should be brought to a common time period and entered at code 352 (Q79).

Where a note has been made at this question or elsewhere on schedules that an item is paid for by someone outside household (but in another household) ie money IS NOT GIVEN TO HOUSEHOLD, refer to Q82.

This question relates to private individuals giving money, not organisations, employers or government agencies.

Regularly paid items only are covered by this question, eg. cooker rental. A once off item, eg cooker installation, is not covered.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 82

SUBJECT: Regular items of household expenditure paid for directly by someone outside the household.

REFER ALSO TO Q: RELEVANT EXPENDITURE QUESTIONS

CODE:

No coding action required.

POINTS TO NOTE:

This is an editing question designed to remove from the household expenditure any regular items paid for by someone outside the household.

Check the last payment for the item as noted at this question against the last payment shown on the 'A' schedule. If the two amounts agree delete the amount on 'A' schedule. If the two amounts do not agree assume that payment is not regular and do not delete amount. The period of payment will assist in checking regularity.

If the item is not an 'A' schedule item (ie is a diary item) delete amounts for that item in D schedule provided it is a regular item, eg cooker rental. Do not delete once off items, eg cooker installation.

This question refers to individuals, not organisations, employers or government agencies, etc making payments.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. IAN 85

SCHEDULE B

Q 83

SUBJECT This question is designed to pick up details of free or concessionary coal or coke from an employer to employees, retired employees and their widows.

REFER ALSO TO Q

CODE

At 247 code number of cwts of coal/coke received in the last 12 months.

At 321 code amount paid by informant in the last 12 months.

At 322 code imputed value minus amount paid by informant in the last 12 months.

POINTS TO NOTE

1. Imputed values

Coal - the value shown in Appendix 1 (at Q30)

Coke - As the price of coke varies from area to area the imputed value from any particular area should be obtained from the DE, giving the nearest town (to sampled address) as shown on DE list.

11. Coal/Coke supplied free

If supplied free no entry should be made at code 321 and the full imputed value should be shown at code 322.

111. Haulage charge should be considered as part of the amount paid by the informant for coal/coke.

ADDITIONAL NOTES (give date and reference)

FES. JAN 85

SCHEDULE: B

Q: 84

SUBJECT: OAP concessionary bus travel

REFER ALSO TO Q: 'A' schedule 98

CODE:

1. at A266 code type of concessionary bus travel

POINTS TO NOTE:

This question applies only to men aged 65 or over and women aged 60 or over.

The type of concessionary travel used on buses should be the same as recorded at Q98 on 'A' schedule.

If there is a 'Don't know' answer to the type of pass code 5, and check that there is an entry at Q98, on 'A' schedule.

(In Northern Ireland these schemes apply only to men and women aged 65 and over).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 85

SUBJECT INCOME AS MAIL ORDER AGENT OR BABY SITTER

REFER ALSO TO Q 36

CODE

At 383 code the amount earned as a mailorder agent or baby sitter in the 12 months before interview.

At A275 enter 1 if the work is being done at present.

POINTS TO NOTE

- i. Check that income has not been entered anywhere else on the schedule
- ii. Income from mail order agency and baby sitting should be combined at 383
- iii. If the income is £260.00 per year (in 1985) or above, entries at 383 and 275 should be deleted and informant treated as self employed at Q's 1, 9, 36 etc. Number of hours worked per week should be assumed to be 30 hours a week or less at Q40.
- iv. If mail order agent and baby sitter code occupation, if treated as self-employed, on basis of highest income. If highest income not known code as mail order agent.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 86

SUBJECT. Income from "odd jobs". This question will also pick up information on continuing jobs as an employee or self-employed person that should have been recorded elsewhere in the schedule

REFER ALSO TO Q: 1, 9, 10-29, 30-34, 36-41

CODE:

The total received from "odd jobs" over the 12 months before the interview should be entered at code 381. Other items should be transferred elsewhere in the schedule or deleted altogether.

POINTS TO NOTE:

The amount to be entered at code 381 consists of those sums of money which are received for odd jobs undertaken during the past 12 months, and which if they were currently being undertaken, would not be accounted for in the employee or self-employed questions. These jobs would be jobs undertaken at a point of time without any regularity or continuity or repetition attached to them, so that a person could never regard himself as being "currently" employed or self-employed in them. However if similar odd jobs are repeatedly done (even if they are done at irregular intervals) they should be treated not as odd jobs but as jobs as a self-employed person or as a casual employee (see below)

If the description of the job and the dates when it took place indicate that a continuing job is currently being held the details should be transferred to the employees or self-employed questions..

The description of the job, the dates when it took place and its duration, may also show that a continuing job was held during the past 12 months but is no longer held because the person has either stopped working altogether or has changed jobs. This constitutes a change of situation because if the interview had occurred during the time the job was held, details would have been picked up at the employee or self-employed questions; such amounts should be deleted.

ADDITIONAL NOTES (give date and reference)

POINTS 10 NOTE (CONT'D)

In the following situations the budget should always be referred to the supervisor.

1. if transferring an entry details changing the code at Q1 B schedule
2. if additional information is required to code the entry adequately at the question to which it has been transferred.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 87

SUBJECT: Income tax paid direct to Inland Revenue

REFER ALSO TO Q: See below

CODE:

At 387 code total of Income Tax paid direct in the 12 months before interview

POINTS TO NOTE:

In general the amounts shown at this question should be accepted. However, in spite of the wording of Q87 it is possible that amounts of income tax may be shown which are duplicating tax payments elsewhere on the schedule or are in respect of interest from stocks, shares, etc at Q77. Where it is clear that this has occurred, the entry should be deleted from code 387.

Also any income tax or surtax paid direct should be accompanied by a source of a current income elsewhere on the B schedule on which it is possible that tax is paid direct (eg. self employment income at Q36, income from property at Q78, other unearned income at Code 384, and income from pensions, etc where tax is not deducted at source). If there is no such source of current income recorded on the B schedule it must be assumed that the tax paid relates to income received in the last 12 months but not at the time of the interview, in which case the tax payment should be deleted as relating to a past situation.

Tax reserve certificates should not be shown at this question; the weekly equivalent should be transferred to each record book and coded as short-term savings.

Amounts set aside for payment of tax should not be coded here or in the record books.

Capital gains tax is required only for editing purposes. No coding action is required.

Payments recorded at this question should EXCLUDE NI payments (see notes on Q89).

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 88

SUBJECT Income Tax refunded directly by Inland Revenue

REFER ALSO TO Q See below

CODE

At 390 code total Income Tax refunded direct in last 12 months.

At A241 code 1 if PAYE refund, code 3 if unemployment or redundancy refund, and code 2 for Other refunds..

At 391 code total amount of refund deleted.

POINTS TO NOTE

1. All refunds should be accepted if there is a current source of income.
2. A PAYE refund is a refund received while employed and due to changed circumstances eg. marriage or code number.
- 3 A refund due to unemployment or redundancy is self explanatory.
4. A refund for other reasons covers all situations other than those in 2 or 3 above.
5. If a refund is deleted at 390 because there is no current income ie. past situation the amount of deleted refund should be entered at 391.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Code 361, 392, A252 (Pg 37)

SUBJECT: Income from an education grant, scholarship etc

REFER ALSO TO Q: 83 A schedule

CODE: _____

If any person aged 16 or over received income from an education grant, scholarship etc during the past 12 months, and there has not been a change of situation, the annual value at Q83 on the A schedule should be coded here.

Code at A252 the source of grant, level of education and establishment attended from Q83 'A' schedule.

At 361 code the difference between the annual value of grant currently received and amount of grant received in cash. (Q83 'A' schedule)

POINTS TO NOTE:

The amount that should be entered at 392 is the amount entered for the person concerned at code 209 or 210 at Q83 'A' schedule.

The source, level of education and establishment should be coded from the following frame:

CODE	SOURCE	LEVEL	ESTABLISHMENT
1	State!	Up to 'A' Level	State
2	"	"	Private
3	"	Above 'A' Level	State
4	"	"	Private
5	"	DK / Other	State
6	"	"	Private
7	Private	Up to 'A' Level	State
8	"	"	Private
9	"	Above 'A' Level	State
10	"	"	Private
11	"	DK / Other	State
12	"	"	Private

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Code 384 (Page 37)

SUBJECT Regular unearned income not accounted for elsewhere in the schedule.

REFER ALSO TO Q The amounts to be entered here may have been recorded in various places throughout the B Schedule.

CODE

Enter the annual total at code 384.

POINTS TO NOTE

Although there is no question which is explicitly designed to cover the amounts that should be entered at code 384, such information may appear erroneously at other questions or may be covered by an interviewer's note. It is not expected that there will be many instances where an amount has to be entered at this code but the following are examples of the type of income which should be shown here if it does appear

- a. interest from private loans
- b. income received by a sleeping partner if the interviewer has noted that it is declared as unearned income to the Inland Revenue. If the interviewer has not made such a note it should be entered at Q36.
- c. income received by the owner of a business who no longer takes any active part in running the business but who has placed a manager in charge and simply draws a flat rate sum from the profits for example £30 per week, if the interviewer has noted that it is declared as unearned income to the Inland Revenue. If the interviewer has not noted this, this income should be entered at Q36.
- d. interest on stocks, shares, bonds, debentures and other securities where tax is not deducted at source. This will apply mainly to foreign investments.

Education grants should not be entered here but at 392.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 89

SUBJECT: NI Contributions paid direct to Inland Revenue or DHSS

REFER ALSO TO Q: 43

CODE:

At 386 code the total paid in the year before interview of

- i. self-employed graduated contributions
- ii. voluntary contributions (when they are paid in a lump sum)

POINTS TO NOTE:

Voluntary contributions when they are paid regularly (ie. not in a lump sum) and self-employed flat-rate contributions should all be recorded at Q43 and not at this question. If it appears that the interviewer has entered them at this question the budget should be referred. Reference should be made to reason specified for payment.

It is possible that the interviewer may have entered National Insurance payments at Q85. If she has made a note to this effect the amounts should be transferred to this question.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE B

Q 90 + code A245

SUBJECT Money sent abroad to individual or charity. Imputed income

REFER ALSO TO Q

CODE

At 334 money sent abroad to private individual or charity.
At A245 if income anywhere on schedules has been imputed. (See code frame below).

POINTS TO NOTE

Money sent to an individual who had not lived abroad for more than 12 months should not be coded.

Only money sent directly abroad to individual or charity should be coded.

Money sent to individual or charity in this country which eventually goes abroad is to be excluded.

This can include money sent to someone who has now returned to this country.

IMPUTATION CODING FRAME (CODE 245)

Imputed self employment income (codes 326, 307 328 313) (Q36).....	Code 1
Interest from Ordinary Savings A/C (373) (Q74)....	2
Interest from Investment A/C (333) (Q74)....	3
Interest from TSB A/C (371) (Q74).....	4
Interest from Building Society (376) (Q74).....	5
Interest from Other Savings A/C (374) (Q74).....	6
Interest from British Savings Bond (408) (Q77).....	7
Interest from Unit Trusts (378) (Q77).....	8
Interest from Stocks and Shares (378) (Q77).....	9
Other imputed income	10

Only one code should appear in box. If two items are imputed use second box etc.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE: B

Q: 91 & codes 392, 361, A252

SUBJECT: Income of dependents under 16

REFER ALSO TO Q: 83 'A' schedule

CODE:

1. At 396 code any income other than that from educational grants, scholarships etc.
2. At 397 code income disposed of by child itself (see below).
3. At 392 code income from educational grants, scholarships etc. coded at 209 or 210 at Q83 'A' schedule.
4. At 361 code difference between annual value of grant currently received and amount received in a cash (Q83 'A' schedule).
5. At A252 code source of grant, level of education; establishment attended from Q83 'A' schedule.

POINTS TO NOTE:

Details of the income of a dependent under 16 years of age should be entered on the B schedule of the parents at Q91.

A different set of codes 392 to 397 should be used for each dependent under 16 who receives income and the appropriate person numbers should be entered in the spaces provided above each of the 392 codes.

Any entry at code 209 or 210 at Q83 on the A schedule (ie education grants, scholarships, etc) relating to a person under 16 should be repeated at code 392. The source of grant, level of education and establishment attended should be coded at A252 (see code 392).

Any other income received by the child should have been detailed at Q91 and should be entered at code 396.

If the income entered at code 396 is disposed of by the child then that amount should also be entered at code 397; if part of it is disposed of by the child then half the amount should be entered at code 397; if the child gives all the income to the parents then code 397 should be left blank.

If a child has income from more than one source or job (apart from education grant, scholarship etc) the combined amount from all sources should be entered at code 396.

Note If there are more than four children under 16 years, interviewers have been instructed to use a further B schedule to record information. Coder given by informant. Coders should check and code such cases as above.

ADDITIONAL NOTES (give date and reference)

CODING NOTES

FES. JAN 85

SCHEDULE C

Q N/A

SUBJECT Credit card account payments.

REFER ALSO TO Q Q72 'A' schedule, D schedule

CODE

1. Items and services shown on schedule.
2. Interest shown on schedule.
- NB Do not code balance brought forward or account payment.

POINTS TO NOTE

1. Interviewers will have indicated at Q72 'A' schedule and on front of 'D' records whether informant has a credit card or not.
2. Interviewers will have left with each informant 2 credit card sheets for each credit card held.
3. Interviewers will have indicated whether a credit card account has been paid or not paid during record keeping by coding front page of diary.
4. A completed credit card sheet should have been returned for each credit card account paid.

Treatment of completed credit card sheets

1. Check that person number and reference number have been entered.
11. Check that date of payment (item 9) falls within record keeping period. If not in record keeping period take no further action except to ensure that there are no entries in punching columns on page 2.
111. Check that amounts on page one (items 2-7) and page two (items purchased) agree arithmetically, ie.
 - a. Item 2) less item 3) equals item 4).
 - b. Item 4) plus item 5) plus total of items acquired (page 2) equal item 7).
- NB A credit balance (marked CR) must be taken into account in calculations.
 - iv. Transfer interest at item 5 to page two below last purchase recorded in box.
 - v. Check that items or services shown on sheet are recorded as being acquired during the expected period of paid account. Delete any outside this period.

ADDITIONAL NOTES (give date and reference)

POINTS TO NOTE (CONT'D):

- vi. Code each item or service to 'D' item code.
- vii. Code interest to 'D' item code 789.
- viii. Items or services refunded should be deleted or abated before coding.
- ix. Cash advances should be deleted.

ADDITIONAL NOTES (give date and reference)

'D' SCHEDULE

CODING NOTES ISSUED BY FES UNITINTRODUCTION

The 'D' schedule is a record book of payments made over a period of seven consecutive days.

Each member of the household who is 16 years or over and a spender completes two record books, thus making a record of payments over a period of fourteen consecutive days. The record keeping period normally starts on the day of interview or the day following.

Points of importance to note regarding 'D' schedule are

- 1 The 'D' schedule is a record of payments NOI acquisitions. (See 10 below)
2. There should be no duplication with items in 'A' 'B' or 'C' schedules other than those given below.
3. No business payments should be included in 'D' schedule.
4. These notes should be read in conjunction with interviewer instructions.

GENERAL CODING INSTRUCTIONS

1. There should be two 'D' schedules for each member of the household aged 16 or over who is a spender.
- 2 Where schedules are missing or incomplete the interviewer should have given an explanation somewhere on the budget.
3. Reference number on front page of 'D' schedule should agree with that for same household member in the 'B' schedule.
4. Week numbers on front page of 'D' schedule, dates and name of day at top of pages 6-19 of each schedule should be checked for consistency, eg, If Sunday has been omitted and page used for Monday, records will cover 15 (or 16) days and the last day (2 days) should therefore be deleted, provided there has been no expenditure omitted on the Sunday(s).
5. Page 23 of 'D' (and page 37 of 'A') schedules should be checked to see if explanatory note is given regarding payments. Where necessary, action should be taken.
6. When deleting entries in 'D' schedule ensure all information regarding entry is deleted ie, item, price and code if entered.
7. When abating or deleting an entry a line should be drawn through original entry. No entry should be erased.
8. The amount paid for an item and the item code must both be entered against each item.
9. Except for meals, alcoholic drinks and soft drinks it does not matter where items appear on the page. Meals, alcoholic drinks and soft drinks are coded according to the section in which they appear (see page 206).
10. Where an informant uses a credit card for grocery purchases these should be coded in the normal way. This is the only case where credit card acquisitions are acceptable in diaries.

ACTION FOR "A" SCHEDULE ITEMS

The 'A' schedule contains details of regular commitments. If any of these are not deleted from 'D' schedule they will give rise to one or other of the following errors.

1. Duplication: Where payment is shown in 'A' and 'D' schedule.
2. Extension of time period: Where commitment is entered into after completion of 'A' schedule and recorded in 'D' schedule.

All entries in 'D' schedule should therefore be scrutinised to ensure that they are not 'A' schedule items.

Where an 'A' schedule item is recorded in 'D' schedule it will normally have:

1. already been shown in 'A' schedule.
2. not been shown in 'A' schedule.

When this occurs the budget should be inspected for explanatory note. If query cannot be cleared by inspection information must be obtained from informant confirming whether commitment was in existence at time of interview or not.

If in existence at time of interview the amount should be entered in 'A' schedule and deleted from 'D' schedule.

If commitment was entered into after interview the entry in 'D' schedule should be deleted and not transferred to 'A' schedule.

ACTION FOR "B" SCHEDULE ITEMS

The 'B' schedule contains details of income both in terms of money and goods in kind.

Income will not normally appear in 'D' schedule but goods obtained from informant's own business may. Where such goods are shown they must have a value shown.

If the informant indicates that he obtains items from his own business which are not paid for at the time, (this will be indicated by a note "own shop"/"own farm" ect. against each item), check that at least one member of the household has been coded 2 at Q1 B schedule or has a subsidiary self-employed job at Q9. Add together the values of all such items shown for the household and enter the total values at code 327 opposite Q36 B schedule of the person who owns the business. The items should also be coded in the D schedule. If members of the household are partners in the business the value of the self-supply goods should be totalled for both partners and them split between their B schedules in the same proportion as their profits.

Where an item has been coded 429 shown at Q16 B schedule it should be shown also in each of the D schedules on page seven (coded to 'D' item code). The amount at Q16 may need to be converted to a weekly equivalent. No entry should be made in the D books if the informant is temporarily off work and not being paid at the time of the interview.

Relationship with B schedule expenses questions (Qs 26-29, 35, 41, 42)

Entries at the B schedule questions should not be used to abate D schedule entries except in the case of a fixed or mileage allowance for car expenses and slot-meter payments for gas and electricity (in the case of Employees) or claims for car expenses and slot-meter payments for gas and electricity (in the case of the Self-Employed). In these cases the D schedules should be abated as instructed in the notes for Qs 26, 27 & 28 and 42 B schedule and not by the entries at page 20 of the D schedule.

Where an entry at page 20 D schedule covers gas or electricity slot-meter payments or car expenditure (where there is a fixed or a mileage allowance) and one or more other items without saying how much is for each item the following action should be taken. Abate the car (or slot-meter) expenditure on the basis of the B schedule questions. The amount abated for these items should be taken from the total at page 20 and the remainder (if any) used to abate the other items covered by the entry at page 20.

When abating D book entries on the basis of the B schedule expenses questions, care should be taken to adjust amounts claimed to cover the correct period.

Where a car allowance is given as a refund for particular expenses at Q26 or Q27/28 B schedule the above three paragraphs do not apply, instead car expenditure in the D schedules should be abated on the basis of page 20 in the same way as other D schedule items.

Where the informant both has a fixed or mileage allowance and gets particular expenses (assumed to be petrol only unless otherwise indicated (see Q28 B schedule)), refunded, the motoring expenditure should be abated for the particular expenses first - the motoring expenditure remaining after this should then be abated, using a car sheet, for the fixed/mileage allowance.

Information on page 20 of the D schedules should not be used to abate entries in the A schedule. However an entry at page 20 D schedule may suggest that an allowance has been missed at the B schedule expenses questions. In that case the budget should be referred.

Refunds from an organisation for which the informant does unpaid work (see Q1 page 20, and Q42 B schedule) should be treated in the same way as refunds of business expenditure but not transferred to the detailed business expenditure codes.

BETTING WINNINGS

All winnings from betting should be shown at Q2 on page 20 of schedule against the appropriate source of winnings.

Any winnings shown elsewhere in schedule should be deleted and transferred to page 20 after checking that they are not already included there.

TRANSFER OF MONIES WITHIN HOUSEHOLD

Transfer of money between members of the household (eg. Husband giving Wife housekeeping money) should be deleted. This does not include payments to au pairs, domestic servants, etc or children who are not spenders (pocket money), such payments should be coded. If items bought with pocket money are known the expenditure should be coded to the appropriate item code.

Any item recorded at Q25 B schedule (Tax relief to employees for expenses incurred as a result of employment) should be deleted from page 20 of the D book. It should not be used to abate any entries (but see the notes at Q25 B schedule about tax relief for car expenses).

Coal or coke entered in 'D' schedule should be deleted if it is shown in 'B' schedule that this is concessionary.

TREATMENT OF REFUNDS

Because the 'D' schedule should contain only non-business expenditure some of the entries will have to be deleted or abated to remove any business element. Page 20 of the 'D' schedule should show any amount which is to be refunded by an employer or claimed as a business expense for tax purposes by a self-employed person - on account of expenditure during the week of the schedule. This information should be used to abate 'D' schedule entries (except gas and electricity slot-meter payments and some car expenditure - see paragraph below on relationship with B schedule expenses questions).

The payment for which a refund is to be received, or which will be claimed as a business expense by a self-employed person should be abated by the amount shown on Q1 page 20. The following points are to be noted when making abatements:

1. For the purposes of abating entries because of refunds, the two 'D' schedules should be considered as one. This means that if there is an excessive refund in one week's schedule, that excess should be used to abate the other week's entries for that item of expenditure.
2. Where the refunds shown exceed the payments over the two week period ignore excess.
3. If refund is less than payment to be abated leave difference in 'D' schedule and code as normal.
4. Where refund covers a combination of payments abate items by a proportional amount (except for the cases described below in the "Relationship with B schedule expenses questions" section).
5. Where an allowance is recorded for an informant living away from home (eg. lodging allowance) abate amount spent on lodgings and meals away from home. If the allowance is in excess of amount spent then abate other items which could be related to informant being away from home, ie . entertainment, drinks and cigarettes.
If allowance is smaller than amount, abate lodgings and meals away from home by allowance and code balance of expenditure in normal way.
When an allowance is shown but no record is shown of expenditure away from home, information should be obtained from informant regarding duration of period and expenditure covered by allowance.
6. If one member of the household makes a business claim for an item which is owned by another member of the household (eg car) the owners car expenditure in the 'A' schedule should be abated by the amount stated by claimant, D schedule expenditure by the claimant should be abated by the amount stated.

Where a car is owned by one person in household but another person claims expenses for business purposes on it, the following action should take place.

1. Abate 'A' schedule expenditure on car concerned.
2. Abate claimant's car expenditure in 'D' schedule.

MONIES RECEIVED FROM SUB-TENANTS FOR 'D' RECORD ITEMS

If a sub-tenant has contributed towards a service in 'A' schedule then the landlord's payment for this service should be abated accordingly.

CREDIT CARDS

Items bought on credit card account, should be deleted with the exception of grocery items.

Where grocery items are bought on credit card it is unrealistic to expect informants to itemise their acquisitions on the credit card sheet some 6-8 weeks after purchase. Informants are therefore allowed to record credit card acquisitions of groceries (normally large weekly shop) in the diaries. 'Credit card' should have been written beside entry. NO OTHER ACQUISITIONS BY CREDIT CARD SHOULD BE ACCEPTED.

Monthly payments to credit card accounts should be deleted as a 'C' schedule item.

COMPOSITE ENTRIES (see also meals out)

Divide unlike items into separate entries where possible and code accordingly.

OWN PRODUCE

Food from own garden (including eggs) should be deleted.

Code expenditure on seeds, fertilizers, chicken food etc except where produce is sold as a business in which case delete as business expense.

INSURANCE POLICIES

Normally the ~ ~ 'A' schedule items but where they refer to a particular event eg. holiday they should be coded as 'D' record items if they appear there. Fridge, freezer and TV maintenance should be coded in 'D' record (see notes at Q45 'A' schedule). Friendly Societies and Sick Clubs are 'A' schedule items.

LOANS AND CREDIT PURCHASES

Delete all loan repayments and desposits on credit agreements. All instalment payments covered by 'A' schedule Q69-76 should be shown there and deleted in 'D' schedule.

PAYMENTS ON BEHALF OF OTHER HOUSEHOLD

Where an informant states that they pay directly any bills, etc. for another household those should be treated as expenditure on that item and coded accordingly.

PAYMENTS TO OTHER HOUSEHOLD

Any payment of money to another household should be considered a cash gift eg son gives mother money to pay telephone account.

EXPENDITURE ABROAD

Expenditure in the Channel Islands and Isle of Man should be coded 757.

For the purposes of FES, non-business expenditure abroad falls into two categories; they are, expenditure in preparation for visit abroad (eg. deposit on holiday, commission on purchase of travellers cheques etc) and actual expenditure incurred during time spent abroad in the fourteen days covered by 'D' schedule.

Expenditure abroad for business purposes and/or purchase of capital items such as houses etc are not to be included and should be deleted.

In order to code correctly the country concerned should have been shown in 'D' schedule.

MONTHLY BILLS COVERING A NUMBER OF ITEMS

i. If a bill is paid and all the items covered have been listed with their separate prices, code the items in the normal way. To avoid duplication, do not code the total amount of the bill.

ii. If the monthly bill has not been itemised, but the informant has listed items bought on account from that store over the 2 weeks record keeping period and has noted their cost to the left of the coding column, code these items after the cost of each item has been increased by the following formula:-

Cost of item		Value of bill		Amount to enter
bought on a/c	x		=	in coding column
		Value of goods bought on		for that item
		a/c from shop in 2 weeks		

This gives a proportionate estimate of the value of the goods in the monthly bill. Delete the original monthly bill.

iii. If no bill is paid during the fortnight's record keeping, items shown on the days they are acquired but not paid for should be deleted.

iv. If a non-itemised monthly bill is paid but items bought on account have not been listed, refer.

LESSONS/NURSERY SCHOOLS/PLAY SCHOOLS

Check with Q84 'A' schedule to see if items mentioned there. If not, refer budget unless diary entry has 'first lesson' written beside it. If item mentioned at Q84 delete diary entry. Playgroups should be coded in diary not 'A' schedule.

GIFTS AND PRESENTS

An attempt should be made to identify actual item bought.

PURCHASES FOR DEEP FREEZE

Where purchases of goods for deep freeze are made during the record keeping period they should be coded, provided payment was made during the period. If payment was not made the goods should be deleted.

If payment is made during the record keeping period for goods purchased previously this should be treated as monthly bill and details of items and cost of each ascertained and coded.

MOTOR VEHICLES

Vehicles purchased during record keeping period should be deleted.

Cars on lease to be coded as car hire.

Petrol, oil etc should be coded, but see notes on abatement of business expenditure.

Petrol and diesel oil is to be coded as motor fuel. Other oil eg. gear box or engine oil should not be included with petrol.

POSTAL ORDERS

Poundage on postal orders should be coded 751.

The postal order itself should be coded according to the item purchased (eg. football pools).

If postal order is purchased during the record keeping period but not used the poundage should be coded at 751 but the value of postal order deleted.

If a postal order has been entered but its use is not specified in record book either on day of purchase or after then delete postal order value but code poundage.

TIPS

Tips and service charge shown separately should be given same code number as service or item supplied.

TOBACCO

Code as pipe tobacco unless there is evidence on the 'D' schedule that informant purchases cigarette papers.

SAVINGS

All sums of money put aside should be deleted. Transfers from a deposit account at a bank to another long-term savings account/shares etc should also be deleted. Transfers from a current account to a deposit account, or to another long-term savings account or to buy shares etc, should be coded.

FORTIFIED WINE

Wines must be coded to item codes for fortified, unfortified and unspecified wines. There will be no reference back on type of wine.

VIDEO RECORDERS/CASSETTES, ETC

From 1985 video rental is an 'A' schedule item and should be deleted in diary. Purchase of video recorders, cassettes and rental of video cassettes continue to be recorded in diary.

MEALS OUT, TAKE-AWAY MEALS, ALCOHOLIC DRINKS AND SOFT DRINKS

Since May 1984 VAT has been chargeable on hot take away food. Informants are asked to state whether these items were bought hot or not. If hot code to appropriate code. If there is no indication that food was bought hot code as cold unless the item is obviously one that is served hot eg coffee, hamburger. Do not refer.

1. Take-away meals brought home

These should have been entered on left hand page of diaries and should be coded as per coding frame. This includes food taken to someone else's home.

Note non-itemisation of fish and chips.

2. Meals out NOT brought home

These are shown at top of right hand page of diaries and should be coded as per coding frame.

Note especially the itemisation of entries except for fish and chips.

New in 1985. Where a meal costs £10.00 or over and there is no indication whether alcoholic drink was or was not included then refer budget. Below £10.00 assume no alcoholic drink was included.

Alcoholic drinks bought and consumed away from home

These should have been entered on right hand page of diary.

If taken with meal the words 'with meal' should have been written beside entry.

If taken with meal but amount not known the words 'amount for alcohol not known' should have been written next to meal out entry.

If alcoholic drinks were not taken with meal then words 'no alcohol' should have been written beside the meal out entry.

4. Alcoholic drinks brought home

These should have been entered on left hand page of diary.

5. Soft drinks

If bought and consumed away from home these should have been entered in meals out section on right hand page.

If brought home soft drinks should be coded 184.

WEDDING RECEPTIONS

Refer if not itemised. If entry states food and drink these proportion on the basis of $\frac{1}{3}$ alcoholic drink and $\frac{2}{3}$ food.

FAMILY EXPENDITURE SURVEY

COLLECTION, EXAMINATION AND PROCESSING OF INFORMATION 1985

Collection of information

1 Information on expenditure is collected partly by interview and partly by records kept by individual members of the household. Details of income, with minor exceptions, are obtained by interview. The three basic forms used in the 1985 survey were:-

Household Schedule used to obtain general information about the household and about certain types of regularly recurring expenditure such as payments for housing (and receipts from sub-letting), account payments for the supply of gas and electricity, for the hire and maintenance of gas and electrical appliances and for telephone charges. Expenditure by individual members of the household on licences, season tickets, insurance premiums, education and training is recorded on this schedule, as is expenditure on credit transactions of all types and the purchase of motor vehicles. The survey covers expenditure in the personal sector only. Business expenses are not usually recorded, but the Income Schedule and the Diary Record-Book contain questions asking whether any business or other recoverable expenses were included in the amounts recorded in order that appropriate adjustments may be made.

Income Schedule used to obtain information about the employment status, earnings and other sources of income of each member of the household aged 16 and over. Details of deductions from income, eg income tax, national insurance and superannuation contributions and miscellaneous other deductions, are also obtained.

Diary Record-Book on which each "spender" maintains a detailed record of expenditure during 14 consecutive days.

& Personnel

2 Fieldwork for the survey in Great Britain is carried out by interviewers of the Social Survey, and in Northern Ireland the interviewing is undertaken by the Policy, Planning and Research Unit of the Department of Finance. At each selected address, calls are first made to ascertain who is living there, to explain the purpose of the survey and to seek the co-operation of the household members; they are assured that all the information they provide will be treated as confidential. If, in a household, all members aged 16 or over, ie spenders, agree to co-operate, they are asked to provide the information required for each of the three schedules. The interviewer completes the Household and Income Schedules from information provided by the head of the household or the housewife, or both, and by each spender in the household. A copy of the Diary Record-Book covering seven days is left with each spender. Further calls are made to ensure that the records are being kept satisfactorily and in sufficient detail, to deal with any queries that may have arisen, to supply the record-books for the second seven-day period and finally to collect the completed records.

Examination and processing of information

3 When the completed documents for each household are received at the headquarters of the Social Survey, or in Northern Ireland at the Policy, Planning & Research Unit, they are scrutinised in detail, edited and coded. Where necessary, further details are obtained from individual household members either by correspondence or by an interviewer re-visiting the household. Part of the editing process is to delete payments which are business expenses and also any expenditure reported in the Diary Record-Books which duplicates information collected on the interview schedules.

4 Names and addresses of household members do not appear on the fieldwork documents, but since they are necessary in connection with the payment of £5 to each spender, and in order to obtain any further information required, a record of the names and addresses is kept with the household documents while checking is in progress. When this stage is complete, the record of the names and addresses is removed and the documents are identified subsequently only by a reference number; the identity of those who co-operate in the survey is therefore known only to the Social Survey or (in the case of Northern Ireland) the Policy, Planning and Research Unit; the names and addresses are subsequently destroyed.

5 The coding process ensures that each item of expenditure, income or other information is recorded correctly against the code number which represents the particular item and, since the results of the survey are expressed in weekly values, that the appropriate divisor is applied to entries on the records relating to periods other than one week.

6 Family Expenditure Survey data are processed by computer. The programs provide for conversion where necessary of recorded amounts of expenditure and income to a standard period of one week. They also provide for the calculation of composite information for each household, eg gross household expenditure, from the details appropriate for each member of a household. This information is then combined to produce the average weekly household expenditure or income of all households in the survey, or of selected groups of households, with the related standard errors of the averages and the number of households recorded as having contributed to the aggregate from which each average is calculated.

The sample design and selection of addresses, 1985

Introduction

1 The Family Expenditure Survey (FES) seeks to cover a nationally representative sample of all private households in the United Kingdom. Since 1967, an effective sample of about 10,400 households, approximately 0.05% of all UK households, has been selected each year to be invited to participate in the survey and of these about 70% agree to co-operate fully. The results of the survey, therefore, are based on data from an annual total of some 7,000 UK households, which provide a large enough sample to give sufficiently accurate estimates of the main components of expenditure and income, and the main characteristics of households. The co-operating sample is also big enough to support more detailed analysis where a large number of households is involved but it is insufficient to give (nor is the FES intended to give) accurate, detailed information about small sections of the household population.

GREAT BRITAIN

Composition of the sample

2 A four-stage stratified rotating design with a uniform overall sampling fraction is used in which the primary sampling units (PSUs) are 455 administrative areas of Great Britain.¹ The secondary units are wards. The third stage comprises addresses within chosen wards or parishes drawn from the Electoral Register—the registers maintained for Parliamentary and Local Government elections. These show names of registered electors by address. The interviewer converts addresses into lists of existing households when visiting each address at the final stage.

Stratification of the sampling frame

3 In Great Britain, the sampling frame of PSUs is stratified by three factors

- (i) A regional factor forming 16 major strata, namely
 - (a) Eight standard regions of England, but treating the Greater London Council area as a separate and additional stratum,
 - (b) Wales divided into three groups of counties,
 - (c) Scotland divided into four groups of sub-regions
- (ii) A secondary stratification factor distinguishes the areas in (i) above by type, with the London Boroughs, Metropolitan County Districts and the Central Clydeside Conurbation forming separate sub-strata. Excluding these areas, the remaining Districts are divided by population density into three

bands with boundaries at 3.2 persons per acre and 0.9 persons per acre. These two population densities were chosen so as to yield approximately equal numbers of Districts in each band. The various categories are

- (a) for England
 - (1) in Greater London, the London Boroughs,
 - (2) outside Greater London, the Metropolitan County Districts, other administrative areas in England having
 - (3) higher density population (3.2 or more persons per acre),
 - (4) medium density (0.9 or more persons per acre but less than 3.2 persons per acre),
 - (5) lower density (less than 0.9 persons per acre)
- (b) for Wales

Within the three groups of counties at (i)(b), districts with

 - (6) higher density,
 - (7) medium density,
 - (8) lower density
- (c) for Scotland
 - (9) the Central Clydeside Conurbation,

Within the four groups of sub-regions at (i)(c), districts with

 - (10) higher density,
 - (11) medium density,
 - (12) lower density

4 The two area stratifying factors (i) and (ii) produce 365 primary sampling units in England, 53 in Scotland and 37 in Wales.

5 The third stratification factor used is an economic indicator based on the rateable value and this is applied to the PSUs identified within each of the sub-strata determined by the first and second stratification factors (i) and (ii) above. For England and Wales, the PSUs are arranged within strata according to the proportion (by value) of domestic property having a rateable value of over £400.

6 The first stage in selecting the sample of addresses is to divide the sampling frame into 168 minor strata of approximately equal size, one PSU being selected from each of these minor strata using random numbers and with the probability of selection of a PSU being proportional to its size. The choice of the number 168 was

¹ The Isles of Scilly and the three Scottish island districts (Orkney, Shetland and Western Isles) as well as the island parts of Cunningham, Argyll and Bute, Lochaber and Skye and Lochalsh districts are not included in the sample because of excessive travel costs and difficulty of accessibility.

governed by various considerations of which the following were the most important:

(a) The total quarterly sample had to be about 2,500 (to give an overall annual sample of some 10,000 households in the UK).

(b) The number of final units selected from each minor stratum had to be such, and clustered in such a way, that a single interviewer could deal with the preliminary fieldwork in a month.

These factors argued in favour of a constant number of final units from each stratum and this number was fixed at 16. These figures therefore yield a quarterly sample of 168×16 namely 2,688 addresses.

The rotating system

7 A further factor in the choice of the number 168 was that a rotating design is used for the sample, in which successive selections are made from the strata in the sampling frame, in such a way as to provide a gradual replacement of PSUs quarter by quarter. Each selected PSU is used four times in successive quarterly periods and then, after the fourth quarter, replaced by another PSU selected from the same stratum. Each selection is made at random and independently of previous selections in that stratum and independently of selections in other strata. Consequently the number of PSUs used in any period of twelve months is $168 + 42 + 42 + 42$ namely 294.

8 Other advantages in the choice of the number 168 are:

(a) it is divisible by 4 to permit quarterly rotation;

(b) it is divisible by 3 to allow each quarterly selection of PSUs to be split into three separate months; it is divisible by a further 2 so that each monthly sample could be divided into two parallel samples if required.

The second stage of sampling

9 A second stage is introduced into the sampling so that fieldwork can be confined to an area of reasonable size for a single interviewer to handle, bearing in mind that co-operating households need to be revisited while record keeping during the survey is in progress. For this purpose each selected PSU is divided into secondary units, i.e. the electoral wards; if a ward contains less than 2,500 electors, it is grouped with a neighbouring ward. Four second stage units are chosen using random numbers with the probability of selection being proportional to the size of each unit. The four units are allocated at random to the four occurrences when the parent PSU appears in the sample.

The third and fourth stages of sampling

10 The third stage is the selection of addresses within the chosen wards. These are obtained by random selection from the Registers of Electors referred to in paragraph 2. A sample of electors is first drawn, using a random start and a constant interval; the addresses selected for the sample are those where the selected elector happens to be the first entry on the register for that address, thus giving an equal chance of selection to each address in the area, with the exception of multi-household addresses (see paragraph 11). In each ward selected

at the second stage 16 addresses are drawn by this procedure, making a total sample of 2,688 in a quarter, or 10,752 in a year.

11 The procedure described produces a sample of addresses some of which contain more than one private household, while some contain no household at all. A special procedure is adopted for sampling multi-household addresses. This involves attempting to identify multi-household addresses at the sampling stage, using different surnames as an indicator. At these addresses the interviewer lists all the households found there, and in the great majority of cases selects one household from the list according to a table of random numbers. At some addresses, however, there is no indication on the Electoral Register that more than one household may be found, but extra households are discovered when the interviewer calls. At such addresses interviewers are instructed to interview all the eligible households up to a maximum of three. There is no deletion of addresses later in the quota to compensate for these extra interviews, although for practical reasons a maximum of four extra interviews are taken in any one quota.

12 The preliminary visits to the 16 addresses in an area, to deal with the interview questionnaires and obtain co-operation, are spread over a calendar month. These preliminary visits are arranged so that as far as possible there is an even flow of budgets throughout the month. Since there is a constant number of areas each month, namely 56, there is a constant flow of budgets throughout the year apart from slight variations in response rate, and at the time of a General Election when interviewing is suspended for some three weeks up to and including polling day.

NORTHERN IRELAND

Composition of the sample

13 Each of the 26 District Councils is subdivided into wards for electoral purposes and these wards are used as the primary sampling units. These units are stratified by a sub-regional factor which divides the wards into three areas, (a) the Belfast District Council area; (b) the remainder of the eastern part of the province covering most of the counties of Antrim and Down and part of Armagh; and (c) the rest of the province;

The next stage of sampling

14 The next stage is the selection of wards which is done by simple random sampling. The selected wards are then allocated to quarters over the year in such a way that the sample is representative of Northern Ireland in any given quarter.

The final stage of sampling

15 The final stage is the selection of address by simple random sampling in each of the three strata.

The total sample size for the Northern Ireland survey is 1200 addresses and a sub-sample of 300 is chosen from it for incorporation into the UK sample .

handbook on the survey ' Additional information on the sample design in Great Britain can also be obtained from the Office of Population Censuses and Surveys, Social Survey Division, Sampling Branch, St Catharines House, 10 Kingsway, London WC2B 6JP and for Northern Ireland from the Department of Finance and Personnel Policy, Planning and Research Unit, Stormont, Belfast, BT4 3SW.

Further information

16 A more detailed description of the sample design and selection of addresses is given in the technical

1 Family Expenditure Survey, Handbook on the sampling, fieldwork coding procedures and related methodological experiments by W F F Kersley, R U Redpath and M Holmes, HMSO 1980

FAMILY EXPENDITURE SURVEY

NOTE ON INTERPRETING INFORMATION ON THE BASE DATA TAPE, 1985

1 Much of the information on the FES annual base tape is secondary data derived from the answers to basic questions. Individual items are obtained in various ways and this note is intended as a guide to the sources and methods used in compiling the coded items as they are eventually recorded on the base tape.

2 Information is first collected from co-operating households by OPCS interviewers. For many of the questions on the household and income schedules, answers are entered directly in the appropriate coding boxes by the interviewers. Other coded entries are made subsequently by OPCS coding and editing staff from the information obtained by the interviewers. Coding boxes which are completed directly by interviewers are indicated on the questionnaires by a dotted line in the £ column; those for completion at the coding and editing stage contain a solid line. The diary record-books, giving details of payments during the 14 days record-keeping period, are completed by each spender, the information recorded being subsequently coded, and where necessary edited, by OPCS staff. OPCS Instructions to Interviewers contain a number of definitions (household, members, spenders, rooms etc) together with detailed instructions on the completion of particular questions.

3 The next stage in the processing of FES data is coding and editing. Here, after any adjustments which may be required to eliminate duplication, business expenditure etc, the information collected by interviewers is entered in the appropriate coding boxes on the questionnaires and code numbers added to the entries in the diary record-books.

4 After coding and editing are completed, the data are transferred to computer files and a number of derived variables, known as product codes, are calculated and added to the tape. A list of the product codes, with a description of the method of calculation, is given in appendix 5 of the paper describing the annual base tape.

5 The final operation in the creation of the FES base tape is the calculation of a further series of computer derived codes. These codes are identified by an asterisk in the lists of codes in appendices 3 and 4 of the paper describing the base tape. For many of these derived codes the values assigned are in themselves code numbers, and, to interpret these, users are referred to the Coding Frames given in appendix 7 of the base tape paper. Neither the product codes nor the other derived codes appear in the interview schedules; they are calculated during computer processing and are written directly on to the base tape.

6 Users of the FES base tape may be faced with two types of problem in interpreting the data. First, to ascertain how the answer to a particular question on the interview schedules is processed, coded, and eventually entered on the base tape. Secondly, to ascertain how a particular coded item for the base tape is built up from the answers to questions. For the first problem, users will need to identify the particular question or questions from the household or income schedule and then to trace the action which has been taken on it, through the Interviewers Instructions, Coding Notes, and the Lists of Product Codes and Information Codes. In the second problem, the way in which a particular code is built up may be ascertained by identifying the code from the lists contained in the paper describing the base tape, and tracing it, and its components, through the Coding Notes and Interviewers Instructions.

7 An example of the tracing action which may be required to resolve each of the two types of problem mentioned in paragraph 6 is given below.

EXAMPLE A. QUESTION 69 ON THE INCOME SCHEDULE (PUBLIC SECTOR PENSIONS)

Reference to the questionnaire shows that the interviewer is required to enter the person number of the recipient of the pension; whether it is by virtue of the former employment of the informant or of the spouse; the amount and the period covered by the last payment; whether tax was deducted at source and, if so, the amount of tax and whether the last payment was gross or net of tax. The Coding Notes for question B 69 show that, at the coding stage, the last payment, after deduction of any tax, entered at code 342 with the appropriate period code; the amount of tax, if any, at code 343 with the period code; and numeral 3 or 4 at code A 236 to indicate the source of the pension. Those pensions identified at the coding stage as being in the public sector are transferred to question 69 before the amounts are entered in the appropriate coding boxes. Reference to the document describing the base tape shows that the amount recorded at these codes, reduced to weekly values, are recorded on the base tape in the personal income record of the recipient of the pension. Examination of the list of product codes also shows that the basic codes are used as components of a number of product codes which are recorded on the base tape in the household or personal product code records, as appropriate. The product codes incorporating public sector pension data number more than seventy and include, on a personal basis, codes 040P, 041P, 049P, 051P, 053P, 079P, 087P and 107P, with household aggregates at codes 328P, 329P, 330P and 331P.

EXAMPLE B. CODE A 070. LOCAL AUTHORITY DWELLING

The description of this code on page 13 of the base tape document shows that this is a computer-derived item which is formed for each household which is recorded at code A120, value 1: type of tenure - Council or New Town Corporation, rented unfurnished.

Reference to code A120 on page 15 shows that this coding is obtained from question 16 of the household schedule (A). The Coding Notes relating to question 16 give definitions of various types of tenure, together with instructions on special groups such as where a house is being purchased from a local authority. Similar definitions are given on page 34 of the Interviewers' Instructions.

FAMILY EXPENDITURE SURVEY 1985

Common problems encountered in the use of data from the survey

The following are comments on some problems frequently met in analysing FES data; some of them are referred to elsewhere in the Information Pack. Criticisms of existing procedures and suggestions for improvement will be considered and may be made in writing to DE or OPCS at the addresses in the contents and Introductory Note.

- (i) Despite its name, the Family Expenditure Survey collects data from households, not families, and members of a household need not be related. The term "family unit" as used in the survey does not refer to the nuclear family, but rather to a unit approximating to the Income Tax Unit as defined by Inland Revenue. (See FES Report, Annex A, definition 1.)
- (ii) The FES does not record intra-household transactions. If the household contains a lodger, there will be no entry of income or expenditure to cover his or her payments for board and lodging. If expenditure is incurred on the lodger's behalf by another member of the household (for instance where the head of household pays the electricity bill for all members) there is no way of identifying this expenditure and allocating it wholly or in part to the lodger. Similarly there is no way of telling if expenditure by one household member has been incurred on behalf of another who has then made a compensatory payment (for instance if a housewife buys clothes on behalf of an elderly parent or teenager). For these reasons, it is not possible to make a meaningful analysis of expenditure or income at a level below that of the household, for instance at a 'family-unit' level; such an analysis could sensibly cover only certain limited types of income such as wages and salaries.
- (iii) In the FES, figures of both expenditure and income are built up from data covering different time periods. For this reason, little is achieved by attempting to compare FES income and expenditure for groups of households. A further point is that, although all household expenditure is in theory included in the survey, some types of income are explicitly excluded. (See FES Report, Annex A, definition 15.) A particular consequence is that savings ratios cannot be obtained by comparing FES income and expenditure figures.
- (iv) FES data are collected throughout the calendar year, to spread the interviewing load evenly. A household interviewed at the beginning of the year will in general be spending less than one interviewed at the end of the year because of intervening price rises. The aggregate figures published may therefore be considered as relating to about the middle of the year.
 - (v) For a variety of reasons such as refusal to give income, refusal to keep records, refusal of at least one adult member of a household, the response rate achieved by the survey is about 70 per cent. The achieved sample is therefore subject to a number of biases. These are described in the FES Report, Introduction, paras 16 and in more detail in articles by W F F Kemsley in Statistical News (November 1975) and by R U Redpath in Statistical News (February 1986). and 17
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- (vi) Some FES data are subject to under-recording and non-response bias (see FES report, Introduction, paras 19 and 21 and Chapter 14, FES Handbook by W F F Kemsley, R U Redpath and M Holmes).

(vii) The FES sample is relatively small in total (about 7,000 households co-operate every year), and for particular groups of households it can be very small. There are obvious dangers in drawing firm conclusions from the results for small groups of households because of the sampling error involved.

(viii) Economic activity rates may be calculated from the FES. However these are likely to be different from those calculated from other surveys such as the General Household Survey. The FES asks "Are you working at present?" whereas most other surveys have a fixed reference period such as a week. The main purpose of the FES activity question is to pick up all possible sources of income and it is closely linked to the income questions. Indeed, after the main question about earnings on the Income Schedule a further enquiry, Question 86, asks "During the last 12 months, have you received any money for odd jobs or any occasional fees for work or professional advice which we have not yet covered?". If the answer is "Yes", the answer to the economic activity question may be amended. The consequence of these special factors is that the FES tends to show higher economic activity rates than other surveys.

(ix) The fullest source of information about FES sampling, fieldwork and coding procedures is the technical handbook "Family Expenditure Survey Handbook - Sampling fieldwork, coding procedures and related methodological experiments" by W F F Kemsley, R U Redpath and M Holmes, HMSO, 1980. Enquiries about correct procedures should be directed to OPCS at the address or telephone numbers mentioned in the Contents and Introductory Note.

(x) Although a continuous survey, the FES is not static in content. To some extent this is reflected in the changes made in codes from the previous year (see Contents and Introductory Note, item 8).

Personal Gross Income (normal), 13 week rule applied
(Code 051P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment:</u> (not included if informant has been away from work without pay for more than 13 weeks)	
B11 or B23	Last take-home pay, if normal, otherwise normal take-home pay	303 or 329
B14	PAYE tax	305
B15	NI conts	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B24	Gross Bonus	312
	<u>Wage/Salary from subsidiary employment:</u>	
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI conts	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income</u>	326, 328
	<u>Investment income:</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, unit trusts, LA securities, etc - net	376
B77	Interest from stocks, shares, unit trusts, LA securities, etc - calculated tax	044P

Schedule and Question No.	Source of Income	Code
B78	Income from property	360
B75	Interest on Nat Savings	373
B75	Interest on Nat Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net includes TU, FS Pension	344
B69	Private sector pensions - tax	345
B70/71	Annuity, trust/covenant - net	346
B70/71	Annuity, trust/covenant - tax	347
	<u>Social Security benefits (a)</u>	
B59	Family income supplement, if current	368
-	Unemployment, sickness/industrial injury, invalidity and supplementary benefits, if received concurrently with earnings	028P
B65	Other Social Security benefits, if current	367
B44	Family Allowance/child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47, B57	War disability pension/NI Disablement	340, 325
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non-contributory invalidity pension	418
B50	Attendance allowance	421

Schedule and Question No.	Source of Income	Code
B61	Maternity allowance, if current	341
B66	Lump sum Christmas Bonus to pensioners	394
	<u>Social Security benefits (b) (included only if informant has been away from work without pay for more than 13 weeks)</u>	
B58	Unemployment benefit, if current	362
B56	TOPS/YOPS allowance, if current	382
B53	Sickness/industrial injury benefit, if current	363
B60	Supplementary benefit, if current	365
B54	Invalidity pension, if current	369
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly Societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

Personal Gross Income (current) Code 053P

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment: (not included if informant was not paid last week or month)</u>	
B11	Take-home pay	303
B14	PAYE tax	305
B15	NI conts	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B13	<u>Less</u> PAYE refunds	304
	<u>Wage/salary from subsidiary employment:</u>	
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI conts	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income:</u>	326, 328
	<u>Investment income</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, unit trusts LA securities, etc - net	378
B77	Interest from stocks, shares, unit trusts LA securities, etc - calculated tax	044P
B78	Income from property and sub-letting	300

337

Schedule and Question No.	Source of Income	Code
B75	Interest on National Savings	373
B75	Interest on National Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net now includes TU, FS pension	344
B69	Private sector pensions - tax	345
B70/71	Annuity - net	346
B70/71	Annuity - tax	347
	<u>Social Security benefits:</u>	
B59	Family Income Supplement, if current	368
B58	Unemployment benefit, if current	362
B52	Statutory Sick Pay - last gross payment	388
B56	TOPS/YOPS allowance, if current	382
B53	Sickness/Industrial Injury benefits, if current	363
B60	Supplementary benefit, if current	365
B54	Invalidity pension, if current	369
B65	Other Social Security benefits, if current	367
B44	Family Allowance/Child's benefit	337
B45	Retirement pension	338
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non- contributory invalidity pension	418
B50	Attendance allowance	421
B61	Maternity allowance, if current	341
B47, B57	War disability pension/NI disablement	340, 325

Schedule and Question No.	Source of Income	Code
B46	Widow's benefits	339
B66	Lump sum Christmas Bonus to pensioners	394
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

Gross Household Income, based on normal earnings
13-week rule applied (Code 344P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment: (not included if informant has been away from work without pay for more than 13 weeks)</u>	
B11 or B23	Last take home pay, if normal, otherwise normal take home pay	303 or 329
B14	PAYE tax	305
B15	NI contributions	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B24	Gross bonus	312
	<u>Wage/salary from subsidiary employment:</u>	
B32	Last take home pay	309
B34	PAYE tax	310
B34	NI contributions	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income</u>	326, 328
	<u>Investment income:</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, LA securities, etc - net	378
B77	Interest from stocks, shares, LA securities, etc - calculated tax	044P

Schedule and Question No.	Source of Income	Code
B78	Income from property and sub-letting	360
B75	Interest on National Savings	373
B75	Interest on National Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net includes TU, FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity - trust/covenant - net	346
B70/71	Annuity - trust/covenant - tax	347
	<u>Social Security benefits (a):</u>	
B59	Family Income Supplement, if current	368
-	Unemployment, sickness/industrial injury, invalidity and supplementary benefits, if received concurrently with earnings	028P
B65	Other Social Security benefits, if current	367
B44	Family Allowance/Child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47, B57	War disability pension/NI Disablement	340, 325
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non contributory invalidity pension	418
B50	Attendance allowance	421
B66	Lump sum Christmas Bonus to pensioners	394

Schedule and Question No.	Source of Income	Code
	<u>Social Security benefits (b); (include only if informant has been away from work without pay for more than 13 weeks)</u>	
B58	Unemployment benefit, if current	362
B56	TOPS/YOPS allowance, if current	382
B53	Sickness/industrial injury benefit, if current	363
B60	Supplementary benefit, if current	365
B54	Invalidity pension if current	369
B61	Maternity allowance, if current	341
	<u>Income from occupation of owned/rent-free dwellings</u>	
-	Rateable value, updated	267P, 268P 269P
	<u>Income from other sources:</u>	
B68	Benefit from TUs, Friendly Societies, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

Current Gross Household Income (Code 352P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment:</u> (not included if informant was not paid last week or month)	
B11	Take-home pay	303
B14	PAYE tax	305
B15	NI conts	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B13	<u>less</u> PAYE refunds	304
	<u>Wage/salary from subsidiary employment:</u>	
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI conts	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income:</u>	326, 328
	<u>Investment income:</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, unit trust LA securities, etc - net	378
B77	Interest from stocks, shares, LA securities, etc - calculated tax	044P

Schedule and Question No.	Source of Income	Code
B78	Income from property and sub-letting	360
B75	Interest on Nat Savings	373
B75	Interest on Nat Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net includes TU, FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity - trust/covenant - net	346
B70/71	Annuity - trust/covenant - tax	347
	<u>Social Security benefits:</u>	
B59	Family income supplement, if current	368
B58	Unemployment benefit, if current	362
B52	Statutory Sick Pay - last gross payment	388
B56	TOPS/YOPS allowance, if current	382
B53	Sickness/industrial injury benefits, if current	363
B60	Supplementary benefit, if current	365
B54	Invalidity pension, if current	369
B65	Other Social Security Benefits, if current	367
B44	Family Allowance/Child's benefit	357
B45	Retirement pension	338
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non-contributory invalidity pension	418
B50	Attendance allowance	421
B47, B57	War disability pension/NI disablement	340, 325
B46	Widow's benefits	339

Schedule and Question No.	Source of Income	Code
B61	Maternity allowance, if current	341
B66	Lump sum Christmas bonus to pensioners	394
	<u>Income from occupation of owned/rent-free dwellings:</u>	
-	Rateable value, updated	267P, 268P 269P
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly Societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

Gross Household Income, based on normal earnings
Last time paid (Code 385P)

FES 1985

Schedule and Question No.	Source of Income	Code
<u>Wage/salary from main employment:</u>		
B11 or B23	Last take-home pay, if normal, otherwise normal take-home pay	303 or 329
B14	PAYE tax	305
B15	NI contributions	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B24	Gross bonus	312
<u>Wage/salary from subsidiary employment:</u>		
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI contributions	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income:</u>	326, 328
<u>Investment income:</u>		
B75	Building Society Interest - net	376
B75	Building Society Interest - calculated tax	046P
B77	Interest from stocks, shares, unit trusts LA securities, etc - net	378
B77	Interest from stocks, shares, unit trusts LA securities, etc - calculated tax	044P

Schedule and Question No.	Source of Income	Code
B78	Income from property and sub-letting	360
B75	Interest on National Savings	373
B75	Interest on National Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net includes TU, FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity - net	346
B70/71	Annuity - tax	347
	<u>Social Security benefits</u>	
B59	Family income supplement, if current	368
-	Unemployment, sickness, industrial injury, invalidity and supplementary benefits, if received concurrently with earnings	028P
B57	Industrial injury disablement pension, if current	325
B65	Other Social Security benefits, if current	367
B44	Family allowance/child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47	War disability pension	340
B48	Mobility allowance	417
B49	Non-contributory invalidity allowance and Housewives' non-contributory invalidity allowance	418
B50	Attendance allowance	421

Schedule and Question No.	Source of Income	Code
B66	Lump sum Christmas Bonus to pensioners	394
	<u>Income from occupation of owned/rent-free dwellings:</u>	
-	Rateable value, updated	267P, 268P 269P
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly Societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

Gross Household Income, based on actual earnings
13 week rule applied (Code 386P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment (not included if informant has been away from work without pay for more than 13 weeks)</u>	
B11	Last take-home pay	303
B14	PAYE tax	305
B15	NI contributions	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B13	<u>less</u> PAYE refunds	304
	<u>Wage/salary from subsidiary employment:</u>	
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI conts	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income:</u>	326, 328
	<u>Investment income:</u>	
B75	Building Society interest - net	376
B75	Building society interest - calculated tax	046P
B77	Interest from stocks, shares, LA securities, etc - net	378
B77	Interest from stocks, shares, LA securities, etc - calculated tax	044P

Schedule and Question No.	Source of Income	Code
B78	Income from property and sub-letting	360
B75	Interest on National Savings	373
B75	Interest on National Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net now includes TU or FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity - net	346
B70/71	Annuity - tax	347
	<u>Social Security benefits (a)</u>	
B59	Family income supplement, if current	368
-	Unemployment, sickness and supplementary benefits, if received concurrently with earnings	028P
B65	Other Social Security benefits, if current	367
B44	Family allowance/child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47, B57	NI disablement/War disability pension	340, 325
B49	Non-contributory invalidity allowance and Housewives' non- contributory invalidity allowance	418
B50	Attendance allowance	421
B48	Mobility allowance	417
B66	Lump sum Christmas Bonus to pensioners	394

Schedule and Question No.	Source of Income	Code
	<u>Social Security benefits (b) (included only if informant has been away from work without pay for more than 13 weeks)</u>	
B58	Unemployment benefit, if current	362
B56	TOPS/YOPS allowance, if current	382
B53	Sickness/industrial injury benefits, if current	363
B60	Supplementary benefit, if current	365
B54	Invalidity pension, if current	369
B61	Maternity allowance, if current	341
	<u>Income from occupation of owned/rent-free dwellings:</u>	
-	Rateable value, updated	267P, 268P, 269P
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly Societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances, for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

Gross Household Income, based on actual earnings
last time paid (Code 387P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment:</u>	
B11	Last take-home pay	303
B14	PAYE tax	305
B15	NI contributions	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B13	<u>less</u> PAYE refunds	304
	<u>Wage/salary from subsidiary employment:</u>	
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI conts	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income:</u>	326, 328
	<u>Investment income:</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, LA securities, etc - net	378
B77	Interest from stocks, shares, LA securities, etc - calculated tax	044P
B78	Income from property and sub-letting	360

Schedule and Question No.	Source of Income	Code
B75	Interest on Nat Savings	373
B75	Interest on National Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annunities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net now includes TU and FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity - net	346
B70/71	Annuity - tax	347
	<u>Social Security benefits</u>	
B59	Family income supplement, if current	368
-	Unemployment, sickness/industrial injury, invalidity and supplementary benefits, if received concurrently with earnings	028P
B52	Statutory Sick Pay - last gross payment	388
B57	Industrial injury disablement pension, if current	325
B65	Other Social Security benefits, if current	367
B44	Family allowance/Child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47	War disability pension	340
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non-contributory invalidity pension	418
B50	Attendance allowance	421
B66	Lump sum Christmas Bonus to pensioners	394

Schedule and
Question No.

Source of Income

Code

Schedule and Question No.	Source of Income	Code
	<u>Income from occupation of owned/rent-free dwellings:</u>	
-	Rateable value, updated	267P, 268P, 269P
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly Societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396

CSO Net Household Income (Code 456P)

FES 1985

Schedule and Question No.	Source of Income	Code
<u>Wage/salary, main and subsidiary employment</u> (if the informant has received unemployment, sickness or invalidity benefits, TOPS/YOPS allowance in the last 12 months, the amount of wage/salary is abated in proportion to the number of weeks in the year for which these benefits were received).		
B11 or B23	Last take home pay, if normal, otherwise normal take home pay	303 or 329
B32	Last take home pay from subsidiary employment	309
B16, B34	Superannuation contributions	318, 319
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B24	Net bonus	330
B30	Value of luncheon vouchers	316
B36	<u>Self-employment income</u>	326, 328
<u>Investment income:</u>		
B75	Building Society interest - net	376
B77	Interest from stocks, shares, unit trusts, LA securities, etc - net	378
B78	Income from property and sub-letting	360
B75	Interest on Nat Savings	373
B75	Interest on Nat Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408

Schedule and Question No.	Source of Income	Code
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Private sector pensions - net includes TU, FS Pension	344
B70/71	Annuity trust or covenant - net	346
	<u>Social Security benefits (a)</u>	
B44	Family Allowance/Child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47	War disability pension	340
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non-contributory invalidity pension	418
B50	Attendance allowance	421
B64/62	Death grant/Maternity grant	407/406
B60	Supplementary benefit, if current	365
B65	Other social security benefits, if current	367
B66	Lump sum Christmas Bonus to pensioners	394
	<u>Social Security benefits (b) (the last weekly payment of these benefits is average over the number of weeks in the last 12 months for which they have been received).</u>	
B58/56	Unemployment benefit, YOPS/TOPS allowance	362, 382
B53	Sickness/Industrial injury benefits	363
B54	Invalidity pension	369
B59	Family Income supplement	368
B61	Maternity allowance	341
B57	Industrial injury disablement pension	325

Schedule and Question No.	Source of Income	Code
	<u>Income from owner-occupation:</u>	
-	Rateable value, updated	267P, 266P
	<u>Income from other sources:</u>	
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B68	Benefits from TUs, Friendly Societies (the last weekly payment is averaged over the number of weeks in the last 12 months for which the benefit has been received)	366
B85	Earnings from mail order agent, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B67	Redundancy pay averaged over years of service	357
B91	Other income of child under 16	396
A83	Value of private scholarships	209
A83	Value of public scholarships	210
	<u>Imputed income:</u>	
B30	Free meals from employer and other free food from employer	320
B83	Value of concessionary coal and coke	322
B36	Value of self-supply goods	327
A80	School milk	259
A80	NHS Milk	263
	<u>Tax and insurance:</u>	
B13	Refunds of PAYE tax	304
B88	Refunds of tax other than PAYE	390
B87	<u>less</u> direct tax payments	387
-	<u>less</u> NI contributions paid by non-employees	029P

CSO Original Household Income (Code 459P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary, main and subsidiary employment (if the informant has received unemployment, sickness or invalidity benefits, TOPS/YOPS allowance in the last 12 months, the amount of wage/salary is abated in proportion to the number of weeks in the year for which these benefits were received).</u>	
B11 or B23	Last take home pay, if normal, otherwise normal take-home pay	303 or 329
B32	Last take home pay from subsidiary employment	309
B14, 34	PAYE tax	305, 310
B15, 34	NI conts	306, 311
B16, 34	Superannuation contributions	318, 319
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B24	Gross bonus	312
B30	Value of luncheon vouchers	316
B36	<u>Self-employment income</u>	326, 328
	<u>Investment income</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, unit trusts LA securities - net	378
B77	Interest from stocks, shares, unit trusts, LA securities - calculated tax	044P
B78	Income from property and sub-letting	360

Schedule and Question No.	Source of Income	Code
B75	Interest on Nat Savings	373
B75	Interest on Nat Savings Bank Investment Account	333
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net includes TU or FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity trust/covenant - net	346
B70/71	Annuity trust/covenant - tax	347
	<u>Income from owner-occupation</u>	
-	Rateable value, updated	267P, 268P
	<u>Imputed income</u>	
B30	Free meals from employer and other free food from employer	320
B83	Value of concessionary coal and coke	322
B36	Value of self-supply goods	327
	<u>Income from other sources</u>	
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children, etc	352
B85	Earnings from mail order agents, baby sitter	383
B86	Other earned income	381
B80	Married woman's allowances from absent husband	385
B91	Other income of child under 16	396
A83	Income from private scholarships	209
B68	TU or Friendly Society Benefits, averaged over number of weeks received	366

Gross Household Income, based on normal earnings
2 week rule applied (Code 491P)

FES 1985

Schedule and Question No.	Source of Income	Code
	<u>Wage/salary from main employment</u> (not included if informant has been away from work without pay for more than 2 weeks)	
B11 or B23	Last take-home pay, if normal, otherwise normal take-home pay	303 or 329
B14	PAYE tax	305
B15	NI contributions	306
B16	Superannuation	318
B16	Participant sports	422
B16	Subs to TUs, Professional Associations etc	424
B16	Other subs	425
B16	Charitable gifts	426
B16	Misc expenditure on services	427
B16	Cash gifts not allocated elsewhere	428
B16	All other deductions not specified above	429
B24	Gross bonus	312
	<u>Wage/salary from subsidiary employment:</u>	
B32	Last take-home pay	309
B34	PAYE tax	310
B34	NI contributions	311
B34	Superannuation and other deductions from pay	319
B36	<u>Self-employment income:</u>	326, 328
	<u>Investment income:</u>	
B75	Building Society interest - net	376
B75	Building Society interest - calculated tax	046P
B77	Interest from stocks, shares, unit trusts LA securities, etc - net	378
B77	Interest from stocks, shares, unit trusts LA securities, etc - calculated tax	044P

Schedule and Question No.	Source of Income	Code
B78	Income from property and sub-letting	360
B75	Interest on Nat Savings	373
B75	Interest on TSB deposits	371
B75	Interest on other savings	374
B77	Interest on British Savings Bonds, War Loan	408
B88	Other unearned income	384
	<u>Annuities and pensions:</u>	
B69	Public sector pensions - net	342
B69	Public sector pensions - tax	343
B69	Private sector pensions - net includes TU, FS Pensions	344
B69	Private sector pensions - tax	345
B70/71	Annuity - net	346
B70/71	Annuity - tax	347
	<u>Social Security benefits (a)</u>	
B59	Family income supplement, if current	368
-	Unemployment, sickness/industrial injury, invalidity and supplementary benefits, if received concurrently with earnings	028P
B52	Statutory Sick Pay - last gross payment	388
B65	Other Social Security benefits, if current	367
B44	Family allowance/Child's benefit	337
B45	Retirement pension	338
B46	Widow's benefits	339
B47, B57	War disability pension/NI Disablement	340, 325
B48	Mobility allowance	417
B49	Non-contributory invalidity pension and Housewives' non-contributory invalidity pension	418
B50	Attendance allowance	421
B66	Lump sum Christmas Bonus to pensioners	394

Schedule and Question No.	Source of Income	Code
	<u>Social Security benefits (b) (included only if informant has been away from work without pay for more than 2 weeks)</u>	
B58	Unemployment benefit, if current	362
B56	TOPS/YOPS allowance, if current	382
B53	Sickness/industrial injury benefit, if current	363
B60	Supplementary benefit, if current	365
B61	Maternity allowance, if current	341
B54	Invalidity pension, if current	369
	<u>Income from occupation of owned/rent-free dwelling:</u>	
-	Rateable value, updated	267P,268P,269P
	<u>Income from other sources:</u>	
B68	Benefits from TUs, Friendly Societies, etc, if current	366
B30	Value of meal vouchers	316
B79	Alimony, allowances from friends, relatives, members of HMF, allowances for foster children etc	352
B86	Other earned income	381
B80	Married woman's allowance from absent husband	385
B91	Scholarship income (cash) - spender or child under 16	392 minus 361
B91	Other income of child under 16	396
B85	Earnings from mail order agent, baby sitter	383

FAMILY EXPENDITURE SURVEY-1985

Person No	
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PAYMENT OF CREDIT CARD ACCOUNT

A payment made to a credit card company (e.g. Access or Barclaycard) is a different type of payment to the other payments recorded by you in the weekly personal spending diary.

As you know, the payment normally covers several items and can also include an amount towards an outstanding balance plus interest.

If you pay part or all of your account during the 7 days of record keeping, we would like you to copy the following details from your account

As shown on account	{	1. Name of credit card company		
		2. Balance from previous statement (if any) £.. .. .*	}	
		3. Previous payment made		£.
		4. Balance brought forward (if shown on the statement)		£..
		5. Interest		£.....
		6. Items shown on account - enter over page		
		7. Present or New } balance outstanding		£.....*
				* If you have a credit balance shown on your account please write CR next to the amount when you copy it onto this form.
	↓			
		8. Payment made to credit card company during the week	£.....	
		9. Date of payment		

PLEASE TURN OVER

INT USE
7 DAY PERIOD
1
2

INTERVIEWERS USE			
Area	Ser	Mid	Card type
			2

ITEMS SHOWN ON CREDIT CARD ACCOUNT

Please write below, the description and cash price of the goods or services included in this account (eg Petrol £7.00)

If you cannot remember the goods purchased please enter type of firm from which they were acquired eg garage, chemist, department store

If any of the expenses are to be claimed as business expenses, or will be refunded, please add "to be claimed or refunded" beside entry

Should you have any problems filling in this form please let the interviewer know.

Date acquired	Description of items bought If clothing please give sex of wearer, and if child the age	Cash price of item		PLEASE LEAVE BLANK
		£	P	
				L
				L
				L
				L
				L
				L
				L
				L
				L
				L
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CHANGES IN INFORMATION CODES 1985

CODE NO	CODE DESCRIPTION	COMBINED WITH CODE NO
1984 CODES DELETED FOR 1985		
A003	Housewife	
A096	Standard Region (see Coding Frame 10)	
A161	Number of vans in household	
NEW CODES INTRODUCED IN 1985		
A131	Head of household years at address	
A132	Items included in rent	
A133	Years mortgage has run	
A134	Years mortgage has to run	
A135	Don't know years mortgage has run / has to run	
A136	Possession of TV games	
A137	Possession of home computers	
A141	Possession of video recorder	
A142	Method of rental	
A143	Number of cars and vans currently owned	
A260	Type of savings held (coding frame 21)	
A261	Amount of savings held under 16s	
CODES WITH A CHANGE OF DESCRIPTION OR CONTENT BETWEEN 1984 AND 1985		
A105	1984 - TV set in household 1985 - No of TV sets in household	
A106	1984 - Rented TV - paid by slot meter - paid by regular payments - other means of payment 1985 - Rented TV - paid by regular payments - paid by slot meter - other means of payment - paid by regular payments and slot meter - paid by regular payments and other means of payment - paid by slot meter and other means of payment - paid by regular payments, slot meter and other means of payment	

CODE NO	CODE DESCRIPTION	COMBINED WITH CODE NO
A125	1984 - Car ownership position (the value is one more than the number of cars in household) 1985 - Car ownership position (the value is one more than the number of cars and vans in the household)	
A168	1984 - Amount of unified Housing Benefit not known 1985 - Amount of 100% Housing Benefit not known	

Changes in Schedule Codes 1985

Code No

B Schedule

Code Description

1984 codes deleted for 1985

171 Lump sum payment from insurance in respect of a motor vehicle

PAYMENT BY BANKERS STANDING ORDER

281 Fuel oil other than for central heating

New Codes introduced in 1985

197 Life assurance taken out April 1984 or later

198 House purchase endowment taken out April 1984 or later

211 Heating cost included in rent

212 Other service costs included in rent

213 Mortgage Protection taken out April 1984 or later

246 Road fund tax paid in the last 12 months on cars and vans currently owned

254 Last video rental payment

323 Amount of housing benefit for all except HoH

324 Amount of housing benefit supplement for all except for HoH

351 Other deductions (excluding tax) from last pension payment

Codes with a change of description or content

between 1984 and 1985

196 Life assurance (1984)
Life assurance taken out before April 1984 (1985)

199 Insurance premiums on mortgage endowment policies (1984)
Insurance premiums on mortgage endowment policies taken out before April 1984 (1985)

208 Mortgage Protection Premiums (1984)
Mortgage Protection Premiums Policy taken out before April 1984 (1985)

219 Season tickets - tube rail or mixed tube\rail (1984)
Season ticket - rail only (1985)

CHANGES IN PRODUCT CODES 1985

CODE NO	CODE DESCRIPTION
1984 Codes deleted for 1985	
059P	Age of housewife, if code A003 is coded, code A005
251P	Gross Value Tenure type 1 = code 241P multiplied by 52
252P	" " Tenure type 2 = code 242P " " "
253P	" " Tenure type 3 = code 243P " " "
254P	" " Tenure type 4 = code 244P " " "
255P	" " Tenure type 5 = code 245P " " "
256P	" " Tenure type 6 = code 246P " " "
291P	Rateable Value Tenure type 1 = code 071 multiplied by 52
292P	" " Tenure type 2 = code 072 " " "
293P	" " Tenure type 3 = code 073 " " "
294P	" " Tenure type 4 = code 074 " " "
295P	" " Tenure type 5 = code 075 " " "
296P	" " Tenure type 6 = code 076 " " "
359P	Age of housewife

CODE NO

CODE DESCRIPTION

CODES WITH A CHANGE OF DESCRIPTION OR CONTENT
BETWEEN 1984 AND 1985

122P	<p>Durable Household Goods - Sum of codes 4010 to 4360, 6010, 6030, 6040, 7840, and 7860 (1984)</p> <p>Durable Household Goods - Sum of codes 4010 to 4200, 4220 - 4360, 6010, 6030, 6040, 7840, and 7860 (1985)</p>
124P	<p>Transport and Vehicles - Sum of codes 5010 to 5590 (1984)</p> <p>Transport and Vehicles - Sum of codes 5010 to 5030, 5050 to 5590 (1985)</p>
125P	<p>Services - Sum of codes 334, 2270 to 2290, 4210, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, plus, if code A250 is coded, sum of codes, 422, 424 to 428 (1984)</p> <p>Services - Sum of codes 334, 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, plus, if code A250 is coded, sum of codes 422, 424 to 428 (1985)</p>
195P	<p>Head of Tax Unit - If code A009 has a value of 1, sum of codes 009P to 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 394, 396, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P (1984)</p> <p>Head of Tax Unit - If code A009 has a value of 1, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032p, 071P, 179P, 337, 340, 356, 394, 417, 418, 421, and if code A201 has a value of 3, minus code 025P (1985)</p>
196P	<p>Wife of Head of Unit - If code A009 has a value of 2, sum of codes 009P to 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 396, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P (1984)</p> <p>Wife of Head of Unit - If code A009 has a value of 2, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032p, 071P, 179P, 337, 340, 356, 381, 394, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P (1985)</p>

CODE NO.	CODE DESCRIPTION
197P	<p>Other Members of Unit :- If code 009 has a value of 3, sum of codes 009P to 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 396, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P (1984)</p> <p>Other Members of Unit :- If code A009 has a value of 3, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 396, 417, 418, 421, and if code A201 has a value of 3, minus code 025P (1985)</p>
368P	<p>Fuel, light and power (negative answers acceptable) :- Sum of codes 117P, 017, 027, 170, 175, 221, 222, 281, item codes 2250, 2260, 2400 to 2610, if suffixed A to L, minus sum of codes 173 and 178 (1984)</p> <p>Fuel, light and power (negative answers acceptable) :- Sum of codes 117P, 017, 027, 170, 175, 221, 222, item codes 2250, 2260, 2400 to 2610 if suffixed A to L, minus sum of codes 173 and 178 (1985)</p>
373P	<p>Durable Household Goods :- Sum of codes 122P, 168, item codes 4010 to 4360, 6010, 6030, 6040, 7840, 7860, if suffixed A to L (1984)</p> <p>Durable Household Goods :- Sum of codes 122P, 168, item codes 4010 to 4200, 4220 - 4360, 6010, 6030, 6040, 7840, 7860, if suffixed A to L (1985)</p>
375P	<p>Transport and Vehicles (negative answers acceptable) :- Sum of codes 124P, 158, 186 to 189, 191, 219, 244, 245, 247, 255, 270, item codes 5010 to 5590, if suffixed A to L minus code 179 (1984)</p> <p>Transport and Vehicles (negative answers acceptable) :- Sum of codes 124P, 158, 186 to 189, 191, 219, 244, 245, 247, 255, 270, item codes 5010 to 5030, 5050 - 5590, if suffixed A to L, minus code 179 (1985)</p>
376P	<p>Services (negative answers acceptable) Sum of codes 125P, 160, 162, 164, 166, 180, 181, 185, 195, 271, 273, 275, 278 to 280, item codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L, minus code 194 (1984)</p> <p>Services (negative answers acceptable) :- Sum of codes 125P, 160, 162, 164, 166, 180, 181, 185, 195, 254, 271, 273, 275, 278 to 280, item codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L minus code 194 (1985)</p>

CODE NO.

CODE DESCRIPTION

197P

Other Members of Unit :-

If code 009 has a value of 3, sum of codes 009P to 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 396, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P (1984)

Other Members of Unit -

If code A009 has a value of 3, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 396, 417, 418, 421, and if code A201 has a value of 3, minus code 025P (1985)

368P

Fuel, light and power (negative answers acceptable) .-

Sum of codes 117P, 017, 027, 170, 175, 221, 222, 281, item codes 2250, 2260, 2400 to 2610, if suffixed A to L, minus sum of codes 173 and 178 (1984)

Fuel, light and power (negative answers acceptable) -

Sum of codes 117P, 017, 027, 170, 175, 221, 222, item codes 2250, 2260, 2400 to 2610 if suffixed A to L, minus sum of codes 173 and 178 (1985)

373P

Durable Household Goods :-

Sum of codes 122P, 168, item codes 4010 to 4360, 6010, 6030, 6040, 7840, 7860, if suffixed A to L (1984)

Durable Household Goods .-

Sum of codes 122P, 168, item codes 4010 to 4200, 4220 - 4360, 6010, 6030, 6040, 7840, 7860, if suffixed A to L (1985)

375P

Transport and Vehicles (negative answers acceptable) .-

Sum of codes 124P, 158, 186 to 189, 191, 219, 244, 245, 247, 255, 270, item codes 5010 to 5590, if suffixed A to L minus code 179 (1984)

Transport and Vehicles (negative answers acceptable) .-

Sum of codes 124P, 158, 186 to 189, 191, 219, 244, 245, 247, 255, 270, item codes 5010 to 5030, 5050 - 5590, if suffixed A to L, minus code 179 (1985)

376P

Services (negative answers acceptable)

Sum of codes 125P, 160, 162, 164, 166, 180, 181, 185, 195, 271, 273, 275, 278 to 280, item codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L, minus code 194 (1984)

Services (negative answers acceptable) -

Sum of codes 125P, 160, 162, 164, 166, 180, 181, 185, 195, 254, 271, 273, 275, 278 to 280, item codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L minus code 194 (1985)

CODE NO

CODE DESCRIPTION

379P	<p>Other Payments (negative answers acceptable) -</p> <p>Sum of codes 128P, 131 to 135, 201 to 205, 196, 199, 206, 208, 229, 276, item codes 2160 to 2230, 8030, if suffixed A to L (1984)</p> <p>Other Payments (negative answers acceptable) -</p> <p>Sum of codes 128P, 131 to 135, 196, 197, 198, 199, 201 to 206, 208, 213, 229, 276, item codes 2160 to 2230, 8030, if suffixed A to L (1985)</p>
397P	<p>Household has rented TV, paid for by regular payments to rental company .-</p> <p>If code A106 has a value of 2, the product code has a value of 1 (1984)</p> <p>Household has rented TV, paid for by regular payments to rental company -</p> <p>If code A106 has a value of 1, 3, 4, 5, 6 or 7, the product code has a value of 1 (1985)</p>
438P	<p>Durable Household goods .-</p> <p>Sum of codes 4010 to 4360, 6010, 6030, 6040, 7840, 7860, if suffixed A to L (1984)</p> <p>Durable Household Goods -</p> <p>Sum of codes 4010 to 4200, 4220 to 4360, 6010, 6030, 6040, 7600, 7840, 7860, if suffixed A to L (1985)</p>
440P	<p>Transport and Vehicles -</p> <p>Sum of codes 5010 - 5590, if suffixed A to L (1984)</p> <p>Transport and Vehicles -</p> <p>Sum of codes 5010 to 5030, 5050 - 5590, if suffixed A to L (1985)</p>
441P	<p>Services -</p> <p>Sum of codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L (1984)</p> <p>Services .-</p> <p>Sum of codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L (1985)</p>

CHANGES IN EXPENDITURE CODES FROM DIARY RECORD-BOOKS 1985

CODE NO	CODE DESCRIPTION	COMBINED WITH CODE NO
1984 CODES DELETED FOR 1985		
421	Rental of video recorders	(became schedul code 254 in 19
504	Second-hand motor cycles	503
NEW CODES INTRODUCED IN 1985		
408	Purchase of TV games	
410	Purchase of Home Computers	
760	Cable TV line rental, wired TV and radio, piped TV	
CODES WITH A CHANGE OF DESCRIPTION OR CONTENT BETWEEN 1984 AND 1985		
149	1984 - Lard, cooking and other oils and fats 1985 - Lard, cooking and other oils and fats soya margarine	
173	1984 - Proprietary food drinks and non-prop- rietary food drinks other than baby milk foods 1985 - Proprietary food drinks and non-prop- rietary food drinks, other than baby milk foods, soya milk	
503	1984 - New motor cycles 1985 - New and second-hand motor cycles	

FAMILY EXPENDITURE SURVEY

ANNUAL BASE TAPE

1985

FAMILY EXPENDITURE SURVEY
ANNUAL BASE TAPE 1985

This note gives details of the contents and layout of the FES annual base tape for 1984. Information about the tape is given in seven appendices, as follows -

<u>Appendix</u>		<u>Page No</u>
1	Description of annual base tape	1
2	Tape layout in diagrammatic form, with sizes of records	7
3	List of Information Codes	10
4	List of Income/Expenditure Codes	22
5	List of Product Codes	31
6	List of Expenditure Codes from Diary Record - books	66
7	Coding Frames	75

The 1985 tape is consistent with the "Option A" tape for 1984

Department of Employment
Statistics Division

May 1986

Family Expenditure SurveyAnnual Base Tape, 1985

1 FES data are recorded on ICL $\frac{1}{4}$ " magnetic tape in standard ICL 2900 DME standard GCK format. Copies of the annual base tape are supplied to other Depts in 9-track format with packing densities of 1,600 bits per inch.

2 Each tape starts with a standard tape header label of 20 words. The first word of the label contains the characters HDDR; the next word contains the tape serial number; the next three words hold the file name (FES 84 AN V AB V V) and the next four words hold, respectively, the reel sequence number, file generation number, retention period and date written. The remaining words in this label are not used for FES purposes.

3 The next record consists of a single word, called a "tape-mark". This is followed by a standard twenty-word record known as a "start-of-data" sentinel. This is not used for FES purposes.

4 Data for FES households are recorded in household reference number (or serial number) order, each household being treated as a number of small records. Several complete records may be included in a tape block provided the total number of words in the block does not exceed 512. Records are not, however split between blocks. The sequence of records is the same for each household. Diary expenditure records are created for all persons aged 16 or over, irrespective of whether the records contain data.

5 The records within a household are arranged in the following sequence:-

```

Household Ident
Household Characteristics
Household Data
Household Product Codes
Credit/HP Ident
Credit/HP Data
Personal Ident )
Personal Characteristics )
Personal Income )
Personal Expenditure Week 1 ) For person No 1, followed by similar records
Personal Expenditure Week 2 ) For person No 2, and so on
Personal Product Codes )

```

6 Data records consist of a series of code numbers and values, codes being recorded as four characters with the related value in the next word in binary. Numeric values of information codes (but not product codes - see note 3, App 5) are recorded on tape in this form. Sterling values are reduced to weekly equivalents during initial processing and the weekly equivalents are recorded on tape in tenths of pence. The period codes which are used to reduce the sterling values to weekly terms, and the multipliers used in processing, are as follows:-

<u>Period Code</u>	<u>Multiplier</u>
1 (1 week)	1.000
2 (2 weeks)	0.500
3 (3 weeks)	0.333
4 (4 weeks)	0.250
5 (calendar month)	0.231
6 (quarter)	0.077
7 (half-year)	0.039
8 (year)	0.019
9 (ten times per annum)	0.192

Except for certain items in the credit/HP data record, period codes are not recorded on tape. Items in the personal expenditure records are treated as covering a 2-week period and the values are divided by 2 before being recorded on tape. Goods acquired through credit schemes, other than credit cards, are treated as covering a calendar month. From 1979, credit card acquisitions cover a 2-week period. Within each record, codes are recorded in ascending order, information codes with prefix A preceding numeric codes. In general, zero values are not recorded on tape, but exceptions to this rule are mentioned in the detailed descriptions of each record given in the following paragraphs.

7 The tape ends with another standard tape-mark and sentinel. The sentinel contains the trailer identification in the first word in which the most significant binary digit is always 1, the next is 0 to indicate the end of the file and the next is 1 to indicate the end of the reel. The second word of the sentinel holds a count of the data blocks recorded. The remaining words in the sentinel are not used for FES purposes.

8 Household Ident Record

This appears once for every household and is always the first record in the household. It is a fixed length record of six words:-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count (6)	1 (24)
2	H/H V	X (4)
3)	Household Reference	X (4)
4)	or Serial number	X (4)
5	Year/Week	X (4) 2 characters for year 2 for week
6	Zero	X (4)

The first character in the household reference number is always R and the second is always zero. Word 6 is not used from 1972 onwards.

9 Household Characteristics Record

This appears once for every household and follows the household ident record. It is a variable length record, as follows:-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0007)	X (4)
3	Code number	X (4)
4	Value	1 (24)

and so on in pairs of words to the end of the record which is indicated by two zero words. The code numbers appearing in this record range from A 016 to A198 inclusive.

10 Household Data Record

This is a variable length record which appears once for every household.-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0002)	X (4)
3	Code number	X (4)
4	Value	1 (24)

and so on in pairs of words to the end of the record which is indicated by two zero words. The codes in this record range from 011 V to 281 V. Code numbers 010, 020, 030, 040, 050, 060, 070, 080, 110, are amended before they are recorded on tape by the addition of the value of code A 120 (type of tenure). If, for example, a household has a value of 2 for code A 120, then code 010 is amended and recorded on tape as 012 V. A similar procedure is used to add the value of code A 119 to codes 130, 150 and 200.

11 Household Product Codes Record

This appears once for every household and is a variable length record.-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0006)	X (4)
3	Product code number	X (4)
4	Value	1 (24)

and so on in pairs of words to the end of the record, indicated by two zero words. Codes appearing in this record are in the range 200P to 592P. Codes in this record may have negative values.

12 Credit/HP Ident Record

This appears only if there is a credit/HP data record to follow. It is a fixed length record of four words.-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count (4)	1 (24)
2	Record Type (HIRE)	X (4)
3)	Household reference	X (4)
4)	number	x (4)

13 Credit/HP Data Record

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0003)	X (4)
3	Zero	1 (24)
4	Transaction type	X (4)
5	Code and suffix letter	X (4)
6	Weekly Value	1 (24)
7	Person number	X (4)
8	Identifier/Transaction type	X (4)
9	Code/Period code	X (4)
10	Value of instalment	1 (24)
11	Transaction type code (A 100)	X (4)
12	Value	1 (24)
13	Cash price code (2391)	X (4)
14	Cash price value	1 (24)
15	Part exchange code (2416)	X (4)
16	Part exchange value	1 (24)
17	Down payment code (2426)	X (4)
18	Down payment value	1 (24)
19	Code A 101	X (4)
20	Number of instalments	1 (24)
21	Code 243/period code	X (4)
22	Value of agreed instalment	1 (24)
23	Code from word 9, suffixed A	X (4)
24	Weekly value of word 10	1 (24)
25	Code from word 9, suffixed B	X (4)
26	Weekly value of word 18	1 (24)

Words 1 and 2 appear once only in the record. Words 3 to 6 are repeated for each credit transaction, but do not appear if there are no credit transactions by the household. Words 7 to 26 are repeated for each HP transaction but do not appear if there are no HP transactions. Word 5 contains codes in the range 101 to 999, from the list of diary record-book codes, with suffix letter C, E, F, G, J, K or L in the fourth position. Word 4 (transaction type) is derived by subtracting 29 from the binary equivalent of the suffix letter in word 5. Word 8 contains an identification letter in the range A to Z and the transaction type (1 to 5). The codes in word 9 are diary record-book codes in the range 101 to 999, with the period code in the fourth position. The value in word 10 is the actual value of the instalment, the weekly value being held in word 24. The value in words 16, 18, 20 and 22 will be zero if the goods were not obtained within the last 3 months. The weekly equivalent of word 18 is held in word 26. Zero values may occur for words 14, and 26. The end of the record is indicated by two zero words.

14 Personal Ident Record

This appears once for each person and is a fixed length record of 5 words:-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count (5)	1 (24)
2	Record Type (PERS)	X (4)
3)	Household reference	X (4)
4)	number	X (4)
5	Person number	X (4)

The person number is held in the third and fourth character positions of word 5.

15 Personal Characteristics Record

This appears once for each person and is a variable length record:-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0001)	X (4)
3	Code	X (4)
4	Value	1 (24)

and so on in pairs of codes and values to the end of the record, which is indicated by two zero words. The codes in this record are in the range A 001 to A 015. Zero values may appear for codes A 002, A 003, A 005, A 007, A 010, A 011, A 012.

16 Personal Income Record

This record appears once for each person aged 16 or over and may occur for persons under 16. The record is of variable length:-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0004)	X (4)
3	Code	X (4)
4	Value	1 (24)

and so on in pairs of codes and values to the end of the record, indicated by two zero words. This record contains codes in the range A 201 to A 288 and 301 V to 429 V. The records of persons under 16 years of age contain only codes 361 V, 392 V, 396 V, 397 V and A 252.

17 Personal Expenditure Record

Two of these records appear for each person aged 16 or over. They are of variable length and contain data from the diary record books separately for week 1 and week 2.

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0015) - Week 1	X (4)
2	" " (0025) - Week 2	X (4)
3	Code/Week/Day	X (4)
4	Value	1 (24)

and so on in pairs of codes and values to the end of the record, indicated by two zero words. Word 3 contains code numbers in the range 101 to 999 with the week/day number held in the fourth position of the word in octal. The day number is not now used and as from 3rd quarter of 1974, all day numbers are recorded on tape as day 1. All values from the diary record books are treated

as covering a 2-week period and are divided by 2 before being recorded on tape in tenths of pence. Some personal expenditure records may not contain any data and in these records the two zero words indicating the end of the record immediately follow word 2.

18 Personal Product Codes Record

This appears once for each person with a personal income record and is always the last record for that person. It is a variable length record:-

<u>Word</u>	<u>Contents</u>	<u>Cobol Picture</u>
1	Word count	1 (24)
2	Record Type (0006)	X (4)
3	Product code number	X (4)
4	Value	1 (24)

and so on to the end of the record, indicated by two zero words. Code numbers appearing in this record are in the range 001P to 199P. The values of some product codes in this record may be negative.

Family Expenditure Survey 1984Records on annual base tape

1 Record name : Household Ident Record size : Min 6; average 6; max 6 Records per file . Average 7000 Record length . Fixed	Word count (6)	1(24)
	H / H Y	X(4)
	Household Ref	X(4)
	Number	X(4)
2 Record name : Household Characteristics Record size : Min 4; Average 108, max 512 Records per file . Average 7000 Record length . variable	Year	X(4)
	Week	X(4)
	0 0 0 0	X(4)
	Word count	1(24)
	0 0 0 7	X(4)
	Code	X(4)
3 Record name : Household data Record size . Min 4; Average 40; max 512 Records per file . Average 7000 Record length . variable	Value	1(24)
	Code	X(4)
	Value	1(24)
	ETC	
	0	1(24)
	0	1(24)
	Word count	1(24)
	0 0 0 2	X(4)
	Code	X(4)
	Value	1(24)
Code	X(4)	
Value	1(24)	
4 Record name : Household product codes Record size : Min 4, Average 168, max 512 Records per file : Average 7000 Record length : variable	ETC	
	0	1(24)
	0	1(24)
	Word count	1(24)
	0 0 0 6	X(4)
	Code	X(4)
	Value	1(24)
	Code	X(4)
	Value	1(24)
	ETC	

5 Record name : Credit/HP Ident
 Record size : Min 4; average 4; max 4
 Records per file: Average 3000
 Record length : Fixed

Word count (4)	1(24)
H I R E	X(4)
Household Ref	X(4)
Number	X(4)

6 Record name : Credit/HP data
 Record size : Min 8; Average 32; max 512
 Records per file : Average 3000
 Record length : variable

Word count	1(24)
0 0 0 3	X(4)
0	1(24)
0 0 0 Trans	X(4)
Type	X(4)
Code C to L	X(4)
Value	1(24)
ETC	
Person number	X(4)
0 0 A to Z Trans	X(4)
Type	X(4)
Code Period	X(4)
Value	1(24)
A 1 0 0	X(4)
Value	1(24)
2 3 9 1	X(4)
Value	1(24)
2 4 1 6	X(4)
Value	1(24)
2 4 2 6	X(4)
Value	1(24)
A 1 0 1	X(4)
Value	1(24)
2 4 3 Period	X(4)
Value	1(24)
Code A	X(4)
Value	1(24)
Code B	X(4)
Value	1(24)
ETC	
0	1(24)
0	1(24)

7 Record name : Personal Ident
 Record size : Min 5; average 5; max 5
 Records per file: Average 20,000
 Record length : Fixed

Word count (5)	1(24)
P E R S	X(4)
Household Ref	X(4)
Number	X(4)
0 0 Person	X(4)
Number	X(4)

8 Record name Personal Characteristics
 Record size Min 28, Average 32; max 34
 Records per file : Average 20,000
 Record length . variable

Word count	1(24)
0 0 0 1	X(4)
Code	X(4)
Value	1(24)
Code	X(4)
Value	1(24)
ETC	
0	1(24)
0	1(24)

9 Record name : Personal Income
 Record size . Min 4, Average 28; max 512
 Records per file : Average 15,000
 Record length variable

Word count	1(24)
0 0 0 4	X(4)
Code	X(4)
Value	1(24)
Code	X(4)
Value	1(24)
ETC	
0	1(24)
0	1(24)

10 Record name . Personal Expenditure
 Record size Min 4, Average 92,
 Max 521
 Records per file : Average 28,000
 Record length : variable

Word count	1(24)
0 0 1 5	X(4)
Code	X(4)
Value	1(24)
Code	X(4)
Value	
ETC	
0	1(24)
0	1(24)

Wk 1
 Wk 2

11 Record name : Personal Product codes
 Record size . Min 6, Average 68; max 512
 Records per file . Average 20,000
 Record length variable

Word count	1(24)
0 0 0 6	X(4)
Code	X(4)
Value	1(24)
Code	X(4)
Value	1(24)
ETC	
0	1(24)
0	1(24)

FAMILY EXPENDITURE SURVEY 1985

LIST OF INFORMATION CODES

Note: (1) Information codes are prefixed with letter A. They are used for data which have numerical (not sterling) values. Period codes are not applicable to these items.

(2) Codes marked * are not printed on the schedules, but are derived from other data by the computer.

(3) Codes A 001 to A 015 and A 201 to A 288 relate to persons. Codes A 016 to A 198 relate to households.

(4) Except for codes A 056 and A 058, children are defined as unmarried persons aged under 18. Adults are married persons irrespective of age or unmarried persons aged 18 and over.

Information from Household Schedule (Schedule A)

Code	Value	Question Number	Item
A 001*		Q 1	Personal Number
A 002*		Q 2	Relationship to Head of Household (see Coding Frame 20)
A 003			Not used in 1985
A 004*	1	Q 3	Sex - Male
A 004*	2	Q 3	Sex - Female
A 005*		Q 4	Age
A 006*	1	Q 5	Marital status - married, husband/wife a household member
A 006*	2	Q 5	" " - married, husband/wife not a household member
A 006*	3	Q 5	" " - not married, aged 18 or over
A 006*	4	Q 5	" " - not married, aged under 18
A 007*	1	Q 6	Education - Not yet attending school
A 007*	2	Q 6	" - State Primary and Nursery School, fewer than 10 sessions per week
A 007*	3	Q 6	" - State Primary and Nursery School, 10 or more sessions per week
A 007*	4	Q 6	" - State Secondary School
A 007*	5	Q 6	" - State Special School
A 007*	6	Q 6	" - Private and Independent Schools, Primary, Preparatory or Secondary
A 007*	7	Q 6	" - University
A 007*	8	Q 6	" - Teacher Training College or advanced further education
A 007*	9	Q 6	" - Non advanced further education up to 'A' level

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 008*		Q 8	Income Unit - Ref number of unit
A 009*	1	Q 8	" " - Head of unit
A 009*	2	Q 8	" " - Wife of head of unit
A 009*	3	Q 8	" " - Young dependant under 25
A 010*		Q 7	Age at which full-time education ceased
A 011*	9	Q 9	Spender
A 012*	1	Q 10	D Schedules completed for both weeks
A 013*			Not used in 1984
A 014*	1		Wife of head of household (derived from Code A002, value 1 and Code A004, value 2)
A 015*	1		Employment position - working (all persons coded 1 at Code 021P)
A 015*	2		Employment position - retired or unoccupied and of minimum NI pension age (males aged 65 and over not coded at Code 021P and females aged 60 and over not coded at Code 021P)
A 015*	3		Employment position - full-time education (all persons coded 3 to 9 at code A 007, and not coded 1 or 2 at code A 015)
A 015*	4		Employment position - other (all persons not coded 1, 2 or 3 at code A 015)
A 016*			Number of single males in household - aged 16 but under 18
A 017*			Number of single females in household - aged 16 but under 18
A 018*			Number of single persons in household - aged 16 but under 18
A 019*			Not used from 1975
A 020*			Number of male children in household - aged under 2
A 021*			" " " " " " - aged 2 but under 5
A 022*			" " " " " " - aged 5 but under 18
A 023*			Number of male adults in household - aged under 45 (see note 4)
A 024*			" " " " " " - aged 45 but under 60
A 025*			" " " " " " - aged 60 but under 65
A 026*			" " " " " " - aged 65 but under 70
A 027*			" " " " " " - aged 70 and over
A 028*			Number of males in household - working
A 029*			" " " " " " - total

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 030*			Number of female children in household - aged under 2
A 031*			" " " " " " - aged 2 but under 5
A 032*			" " " " " " - aged 5 but under 18
A 033*			Number of female adults in household - aged under 45 (see note 4)
A 034*			" " " " " " - aged 45 but under 60
A 035*			" " " " " " - aged 60 but under 65
A 036*			" " " " " " - aged 65 but under 70
A 037*			" " " " " " - aged 70 and over
A 038*			Number of females in household - working
A 039*			" " " " " " - total
A 040*			Number of children in household - aged under 2
A 041*			" " " " " " - aged 2 but under 5
A 042*			" " " " " " - aged 5 but under 18
A 043*			Number of adults in household - aged under 45 (see note 4)
A 044*			" " " " " " - aged 45 but under 60
A 045*			" " " " " " - aged 60 but under 65
A 046*			" " " " " " - aged 65 but under 70
A 047*			" " " " " " - aged 70 and over
A 048*			Number of persons in household - working
A 049*			" " " " " " - total
A 050*			" " " " " " - retired or unoccupied and of minimum NI pension age
A 051*			Number of persons in household - retired or unoccupied but under minimum NI pension age
A 052*			Code for households with married women (see Coding Frame 12)
A 053*			Not used
A 054*			Sampling Group - No. of times primary sampling unit used
A 055*			Month of sampling
A 056*			Household composition - 16 year old adult basis (see Coding Frame 2)
A 057*			Household composition (DE) - (see Coding Frame 2)
A 058*			Household composition (CSO) - (see Coding Frame 15)
A 059*			Ranges of Gross Household Income (Code 344P ranged as in Coding Frame 6)
A 060*			Ranges of Gross Head of Household Income (Code 345P ranged as in Coding Frame 7)
A 061			Not used from 1984
A 062			Not used from 1984
A 063			Not used from 1984
A 064			Not used from 1984
A 065*			Age of head of household by ranges (see Coding Frame 19)
A 066*			Age of wife of head by ranges (see Coding Frame 19)

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 067*			Ranges of total expenditure (DE) - (Code 378P ranged as in Coding Frame b)
A 068			Not used from 1984
A 069*			Type of household (see Coding Frame 5)
A 070*			Local Authority dwelling (Code A 120, value 1)
A 071*	1		Retired households (CSO) - (Households in which the percentage of pensioner income - Code 452P - is 50% or more)
A 071*	2		Non-retired households (CSO) - (Households in which the percentage of pensioner income - Code 452P - is less than 50%)
A 072*			Not used from 1984
A 073*			Not used from 1984
A 074*			Not used from 1984
A 075*			Head of household out of a job (see Coding Frame 27)
A 076*			Number of persons not yet attending school
A 077*			Number of persons at - State Primary and Nursery School, fewer than 10 sessions per week
A 078*			- State Primary and Nursery School 10 or more sessions per week
A 079*			- State Secondary School
A 080*			- State Special School
A 081*			- Private and Independent Schools, Primary, Preparatory or Secondary
A 082			- (not used from 1983)
A 083*			- University
A 084*			- Teacher Training College or advanced further education
A 085*			- Non advanced further education up to 'A' level
A 086			- (not used in 1984)
A 087*			Number of persons, aged 16 or over, at - State Secondary Schools
A 088*			- Private and Independent Secondary Schools
A 089*	1		One-adult households (Code A 057, values 1 and 2)
A 089*	2		Two-adult households (Code A 057, values 7 and 8)
A 090*			Economic position of wife of head of household (see Coding Frame 23)

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 091			Not used from 1984
A 092*			Occupation of head (see Coding Frame 3)
A 093*			Industry of head (see Coding Frame 4)
A 094*			Economic position of head (see Coding Frame 23)
A 095			Not used from 1983
A 096*			Not used in 1985
A 097*			Type of Administrative Area (see Coding Frame 1)
A 098*			Standard Region (see Coding Frame 18)
A 099*			Quarter number
A 100*	1	Q 74/75	Hire purchase - Bank
A 100*	2	Q 74/75	" " Finance house
A 100*	3	Q 74/75	" " Second mortgage
A 100*	4	Q 74/75	" " HP/Credit Sale agreement
A 101		Q 75	Hire Purchase - Number of instalments
A 102	1	Q 50	Telephone in household
A 103	5	Q 54	Household has - gas only
A 103	6	Q 54	" " - electricity only
A 103	7	Q 54	" " - gas and electricity
A 103	8	Q 54	" " - neither gas nor electricity
A 104*			Code for number of workers (the value is one more than the number of workers in the household)
A 105	1-9	Q 48	No. of TV sets in household
A 106	1	Q 48	Rented TV - paid by regular payments
A 106	2	Q 48	- paid by slot meter
A 106	3	Q 48	- other means of payment
A 106	4	Q 48	- paid by regular payments and slot meter
A 106	5	Q 48	- paid by regular payments and other means of payment
A 106	6	Q 48	- paid by slot meter and other means of payment
A 106	7	Q 48	- paid by regular payments, slot meter and other means of payment
A 107*			Ranges of Disposable Income (code 389P ranged as in Coding Frame 6)
A 108	1	Q 52	Washing machine available in household
A 109	7	Q 16	Type of tenure - housing association, rented unfurnished
A 110	1	Q 16	Tenancy dependent on job
A 111		Q 13	Number of rooms in this accommodation solely occupied
A 112		Q 13	Number of rooms in this accommodation shared
A 113		Q 13	Number of rooms in this accommodation sub-let
A 114		Q 13	Total number of rooms in this accommodation
A 115		Q 14	Number of garages owned/rented/occupied rent-free
A 116	1-42	Q 53	Type of fuel used for room heating (see Coding Frame 13)
A 117		Q 65	Number of new cars/vans bought in last 12 months
A 118		Q 65	Number of second hand cars/vans bought in last 12 months
A 119	1	Q 31	Source of mortgage - Building Society
A 119	2	Q 31	- Local Authority
A 119	3	Q 31	- Bank
A 119	4	Q 31	- Insurance Company
A 119	5	Q 31	- Other Source

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 120	1	Q 16	Type of tenure - Council or New Town Corporation, rented unfurnished
A 120	2	Q 16	- Other rented, unfurnished
A 120	3	Q 16	- Rented, furnished
A 120	4	Q 16	- Owned with mortgage
A 120	5	Q 16	- Owned outright
A 120	6	Q 16	- Rent-free
A 121			Not used from 1984
A 122			Not used from 1983
A 123	1/12	Q 93	Type of accommodation occupied (see Coding Frame 25)
A 124		Q 64	Number of cars and vans in household
A 125*			Car ownership position (the value is one more than the number of cars and vans in the household)
A 126			Not used from 1984
A 127		Q 28	Month/Year of most recent lump sum rates rebate
A 128	1	Q 54	Gas paid by - slot meter
A 128	2	Q 54	- account
A 128	3	Q 54	- Board Budgeting scheme
A 128	4	Q 54	- Other method or 2 or more methods
A 129	1	Q 93	Local Authority concessionary bus travel provisions for OAP
			- Free bus pass or permit
A 129	2	Q 98	- Half fare bus pass or permit
A 129	3	Q 98	- Flat fare bus pass or permit
A 129	4	Q 98	- Bus tokens or bus tickets
A 129	5	Q 98	- Any other type of concessionary OAP bus pass
A 129	7	Q 98	- Local Authority does not operate a concessionary scheme
A 130	1	Q 54	Electricity paid by - slot meter
A 130	2	Q 54	- account
A 130	3	Q 54	- Board budgeting scheme
A 130	4	Q 54	- other method or 2 or more methods
A 130	5	Q 54	- COCD (N. Ireland only)
A 131	1/99	Q 15	HOH years at address
A 132	1/15	Q 17	Items included in rent
A 133	1/24	Q 39	Years mortgage has run
A 134	1/24	Q 40	Years mortgage has to run
A 135	1	Q 39/40	DK
A 136	1	Q 48	Possession of TV games
A 137	1	Q 48	Possession of home computers
A 138		Q 61	Gas - Month/Year of last account
A 139		Q 61	Electricity - Month/Year of last account
A 140	1	Q 28	Rate rebate received in last 12 months

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 141	1	Q 49	Possession of video recorder
A 142	1/2	Q 49	Method of rental
A 143	1/3	Q 64	Number of cars and vans currently owned
A 144			Not used from 1983
A 145			" " " "
A 146			" " " "
A 147			" " " "
A 148		Q 28	Tens = Period code for rates payment; Units = Period code for rates rebate
A 149		Q 64	Number of privately owned cars in household (special OME definition, see Coding Notes)
A 150	1	Q 52	Central Heating by electricity
A 151	1	Q 52	Central Heating by gas
A 152	1	Q 52	Central Heating by oil
A 153	1	Q 52	Central Heating by solid fuel
A 154	1	Q 52	Central Heating by fuel not known
A 155	1	Q 29	DK if housing rebate/allowance includes Housing Benefit Supplement
A 156	1	Q 29	Amount of Housing Benefit Supplement not known
A 157	1	Q 82	Free travel to State School by bus or train
A 157	2	Q 82	Travel to State School is not free
A 157	3	Q 82	Travel to State School is free for some but not all
A 158		Q 38	Mortgage Interest - Month/year period started
A 159		Q 38	" " " " " ended
A 160		Q 64	Number of cars in household
A 161			Not used in 1985
A 162		Q 64	Number of motorcycles etc in household
A 163	1	Q 41	Mortgage payment - net of tax
A 163	2	Q 41	" " - gross of tax
A 163	3	Q 41	" " - DK
A 164	1	Q 52	Household has - fridge/freezer
A 165	1	Q 52	" " - fridge
A 166	1	Q 52	" " - freezer
A 167		Q 82	Number of children travelling to State School by bus or train
A 168	1	Q 17	Amount of 100% Housing Benefit not known
A 169	1	Q 21	Amount of rent rebate not known
A 170			Not used from 1984
A 171	1	Q 28	Amount of rate rebate not known
A 172	1	Q 28	Amount of lump sum rate rebate not known
A 173	1	Q 23	Rates included in rent

Information from Household Schedule (Schedule A) (contd)

Code	Value	Question Number	Item
A 174	1	Q 99	Household where an expenditure item has been imputed
A 175*			Range of Chief Economic Supporter's Normal Gross Income (ranged as Coding Frame 6)
A 176*			Age of Chief Economic Supporter by ranges (see Coding Frame 19)
A 177*			Occupation of Chief Economic Supporter (see Coding Frame 3)
A 178*			Economic Position of Chief Economic Supporter (see Coding Frame 23)
A 179*	1		Chief Economic Supporter is male and head of household (A 251 coded 1, A 001 coded 1)
A 179*	2		Chief Economic Supporter is male and not head of household (A 251 coded 1 or 2, A 004 coded 1, A 002 coded 2 to 8)
A 179*	3		Chief Economic Supporter is female and head of household (A 251 coded 2, A 001 coded 1)
A 179*	4		Chief Economic Supporter is female and not head of household (A 251 coded 1 or 2, A 004 coded 2, A 002 coded 1 to 8)
A 180			Not used from 1984
A 181			" " " "
A 182			" " " "
A 183			" " " "
A 184			" " " "
A 185			" " " "
A 186			" " " "
A 187			" " " "
A 188			" " " "
A 189			" " " "
A 190*			Combination of durables owned (see Coding frame 24)
A 191*	1		Household does not have a telephone
A 191*	2		Household has a telephone
A 192			Not used from 1981
A 193	1-7	Q 84	Educational courses - type of establishment attended -
A 193	1	Q 84	State only
A 193	2	Q 84	Private only
A 193	3	Q 84	Individual only
A 193	4	Q 84	State and private
A 193	5	Q 84	State and individual
A 193	6	Q 84	Private and individual
A 193	7	Q 84	State, private and individual
A 194			Not used from 1983
A 195	1-7	Q 84	Any other course or private tuition - type of establishment attended: coded as in A 193
A 196		Q 81	Number of 'paid for' school meals in past 7 days
A 197		Q 81	Number of free school meals in past 7 days
A 198		Q 79	Number of items free on prescriptions in past 7 days

Information from Income Schedule (Schedule B)

Code	Value	Question Number	Item
A 201	1	Q 1	At present working as employee
A 201	2	Q 1	Self-employed or employer
A 201	3	Q 1	Out of employment but seeking work
A 201	4	Q 1	Sick or injured but intending to seek work
A 201	5	Q 1	Sick or injured but not intending to seek work
A 201	6	Q 1	Retired
A 201	7	Q 1	Unoccupied
A 202*	1		Self-employed or employer (persons coded 2 at code A 201 and coded 1 at code 021P)
A 202*	2		At present working as full-time employee (persons coded 1 at code A 201, coded 2 or not coded at code A 207 and coded 31 or more at code A 220)
A 202*	3		At present working as part-time employee (persons coded 1 at code A 201, coded 2 or not coded at code A 207 and coded less than 31 at code A 220)
A 202*	4		Full-time employee temporarily away from work (persons coded 1 at code A 201, coded 1, 3 or 4 at code A 207 and coded 31 or more at code A 220)
A 202*	5		Part-time employee temporarily away from work (persons coded 1 at code A 201, coded 1, 3 or 4 at code A 207 and coded less than 31 at code A 220)
A 202*	6		Retired and of minimum NI pension age (males aged 65 and over, females aged 60 and over, coded 6 at code A 201)
A 202*	7		Retired but under minimum NI pension age (males aged less than 65, females aged less than 60, coded 6 at code A 201)
A 202*	8		Unoccupied and of minimum pension age (males aged 65 and over, females aged 60 and over, coded 5 or 7 at code A 201 or coded 1 to 4 at code A 201 and not coded at 021P)
A 202*	9		Unoccupied but under minimum NI pension age (males aged less than 65, females aged less than 60, coded 5 or 7 at code A 201 or coded 1 or 2 at code A 201 and not coded at 021P)
A 202*	10		Employee out of a job - worker (persons coded 3 or 4 at code A201 and coded at code 021P)
A 202*	11		Employee out of a job - non worker (persons coded 3 or 4 at code A201 and not coded at code 021P)
A 203	1	Q 40	Self-employed - value 1 = full time; value 2 = part time
A 203	2	Q 40	(1st self-empt is coded in tens position; 2nd in units position)
A 204		Q 10	Employee earnings - week/year last time paid
A 205		Q 57	Industrial injury disablement pension - no. of weeks received
A 206		Q 5	Number of weeks retired
A 207	1	Q 3	Away from work because of - illness or accident
A 207	2	Q 3	- holiday
A 207	3	Q 3	- strike
A 207	4	Q 3	- other reason
A 208		Q 3/4	Number of weeks away from work

Information from Income Schedule (Schedule B) (contd)

Code	Value	Question Number	Item
A 209	1	Q 3	Away from work - on full pay
A 209	2	Q 3	- on part pay
A 209	3	Q 3	- without pay
A 210		Q 9	Main occupation (see Coding Frame 3)
A 211		Q 9	Main industry (see Coding Frame 4)
A 212	1	Q 9	Subsidiary occupation as an employee
A 213		Q 12	Code for period covered by last wage or salary
A 214	1	Q 9	Subsidiary occupation as self-employed
A 215		Q 2/4/8	Number of weeks worked in last year
A 216		Q 19/20	Actual hours worked for last pay
A 217	1	Q 6	Not seeking work - looking after sick relatives
A 217	2	Q 6	" " " - not looking after sick relatives
A 218	1-45	Q 76	Type of investment (see Coding Frame 9)
A 219		Q 21	Paid overtime hours worked
A 220		Q 17	Usual weekly hours
A 221	1	Q 7	Permanently unable to work
A 221	2	Q 7	Not permanently unable to work
A 222		Q 58	Unemployment benefit - number of weeks received
A 223	1	Q 58	" " - receiving at present
A 224		Q 53	Sickness/Industrial injury benefit - number of weeks received
A 225	1	Q 53	Sickness/Industrial injury benefit - receiving at present
A 226		Q 36	Self-employment income - month/year period ended
A 227		Q 36	" " " - no. of months for which figures available
A 228		Q 59	Supplementary benefit - number of weeks received
A 229	1	Q 59	" " - receiving at present
A 230		Q 68	Benefits from TUs, Friendly Societies etc - no. of weeks received
A 231	1	Q 68	" " " " " " - receiving at present
A 232		Q 65	Other State Benefits - number of weeks received
A 233	1	Q 65	" " " - receiving at present
A 234	1		Last net wage/salary includes Statutory Sick Pay
A 235		Q 16	Pay slip seen/consulted/not consulted
A 236	3	Q 69	Public sector pension from own employment
A 236	4	Q 69	Public sector pension from spouse's employment
A 237	3	Q 70	Private sector pension from own employment
A 237	4	Q 70	Private sector pension from spouse's employment
A 238	1	Q 57	Industrial injury disablement pension - receiving at present
A 239		Q 61	Maternity allowance - no. of weeks received
A 240	1	Q 61	" " - receiving at present
A 241	1	Q 88	Tax refunded directly was PAYE
A 241	2	Q 88	Tax refunded directly was other than PAYE
A 241	3	Q 88	Tax refunded directly was by reason of unemployment or redundancy

Information from Income Schedule (Schedule B) (contd)

Code	Value	Question Number	Item
A 242			Not used from 1984
A 243			Not used from 1984
A 244		Q 18	Number of hours paid overtime usually worked per week
A 245	1-10	Q 90	Person for whom item of income has been imputed (see Coding Frame 29)
A 246	1	Q 56	Type of Government Training Scheme - TOPS
A 246	2	Q 56	" " " " " - YOP
A 246	3	Q 56	" " " " " - YTS
A 246	4	Q 56	" " " " " - Other
A 247		Q 83	Cwts of concessionary coal/coke in last year
A 248*			Ranges of personal gross employee earnings (Code 199P ranged as in Coding Frame 22)
A 249		Q 56	Number of weeks on TOPS/YOPS course in last year
A 250	1	Q 10	Last wage/salary from main occupation was received last week/month
A 251*	1		Chief Economic Supporter in household with male head
A 251*	2		Chief Economic Supporter in household with female head
A 252		Q 88	Education Grants - Spender or child under 16 - source of grant, level and establishment (see Coding Frame 26)
A 253			Not used in 1984
A 254	1	Q 23	Last wage/salary is normal
A 255	1	Q 31	Last wage/salary from subsidiary occupation was received last week/month
A 256		Q 59	Family Income Supplement - number of weeks received
A 257	1	Q 59	" " " " - receiving at present
A 258		Q 54	Contributory invalidity pension/allowance - no. of weeks weeks received
A 259	1	Q 54	" " " " - receiving at present
A 260	1-46	Q 74	Type of savings held (coding frame 21)
A 261		Q 76	Amount of savings held under 16s
A 262			Not used from 1983
A 263			" " " "
A 264			" " " "
A 265			" " " "
A 266		Q 84	Concessionary bus travel pass, permit etc held by OAP (coded as A 129 except value 6 = value of token or ticket not known)

Information from Income Schedule (Schedule b) (contd)

Code	Value	Question Number	Item
A 267		Q 55	Number of weeks paid by employer while at the same time in receipt of Statutory Sick Pay, NI Sickness Benefit etc.
A 268			Not used from 1983
A 269			" " " "
A 270			" " " "
A 271			" " " "
A 272	1	Q 55	Receipt of payment from employer while at the same time in receipt of Statutory Sick Pay, NI Sickness Benefit etc. - payment every week by employer - payment for some of the weeks
A 272	2	Q 55	
A 273	1	Q 56	TOPS/YOPS Allowance - receiving at present
A 274	1	Q 63	Maternity pay received from employer
A 275	1	Q 85	At present working as mail order agent or baby-sitter.
A 276	1	Q 9	Director in main occupation
A 277	1	Q 9	Director in subsidiary occupation
A 278		Q 52	Statutory Sick Pay - no. of weeks received
A 279	1	Q 52	" " " - receiving at present
A 280			Not used from 1984
A 281			Not used from 1984
A 282			Not used from 1984
A 283			Not used from 1984
A 284	1-13	Q 76(a)	Amount of SAYE, Nat. Savings Certs. and Premium Bonds held (See Coding Frame 28)
A 285	1		Car provided by - employer
A 285	2		- spouse's employer
A 285	3		- other
A 286	1		Employer supplies some petrol for private motoring
A 286	2		" " all " " " "
A 287*	1		Employee without company car
A 287*	2		Employee with company car
A 288*	1		Director without company car
A 288*	2		Director with company car

FAMILY EXPENDITURE SURVEY 1985

LIST OF INCOME/EXPENDITURE CODES

Note: (1) Codes marked * are not printed on the schedules but are derived from other data by computer

(2) All values are converted to weekly terms during initial processing and are recorded on tape as tenths of pence (1,000 = £1)

 Items from Household Schedule (Schedule A)

Code	Question Number	Item
001 to 009		Not used
		<u>Net rent/rates</u>
010	Q18	- all rented dwellings
011*		- Council, rented unfurnished
012*		- Other rented, unfurnished
013*		- Rented, furnished
014	Q28	Rates rebate - Most recent lump-sum refund
015		Not used from 1980
016		Not used from 1980
017	Q52	Expenditure on fuel oil for central heating
018 to 019		Not used
		<u>Net rent/rates including non-separable service element</u>
020	Q22	- all rented dwellings
021*		- Council, rented unfurnished
022*		- Other rented, unfurnished
023*		- Rented, furnished
024		Not used from 1982
025		Not used from 1983
026		Not used from 1982
027	Q22	Service element paid with rent
028 to 029		Not used
		<u>Net rates if paid separately</u>
030	Q24/27	- all tenure types
031*		- Council, rented unfurnished
032*		- other rented, unfurnished
033*		- rented, furnished
034*		- owned with mortgage
035*		- owned outright
036*		- rent-free
037 to 039		Not used
		<u>Rates rebate/relief</u>
040	Q28	- all tenure types
041*		- Council, rented unfurnished
042*		- other rented, unfurnished

Items from Household Schedule (Schedule A)

Code	Question Number	Item
	043*	- rented, furnished
	044*	- owned with mortgage
	045*	- owned outright
	046*	- rent-free
048 to 049	Q28	Lump sum refunds of rates rebate/relief Not used
		<u>Water charges</u>
	050	- all tenure types
	051*	- Council, rented unfurnished
	052*	- other rented, unfurnished
	053*	- rented, furnished
	054*	- owned with mortgage
	055*	- owned outright
	056*	- rent-free
057 to 059		Not used
		<u>Other regular housing payments</u>
	060	- all tenure types
	061*	- Council, rented unfurnished
	062*	- other rented, unfurnished
	063*	- rented, furnished
	064*	- owned with mortgage
	065*	- owned outright
	066*	- rent-free
067 to 069		Not used
		<u>Rateable value for portion of dwelling occupied</u>
	070	- all tenure types
	071*	- Council, rented unfurnished
	072*	- other rented, unfurnished
	073*	- rented, furnished
	074*	- owned with mortgage
	075*	- owned outright
	076*	- rent-free
077 to 079		Not used
		<u>Rate poundage</u>
	080	- all tenure types
	081*	- Council, rented unfurnished
	082*	- other rented, unfurnished
	083*	- rented, furnished
	084*	- owned with mortgage
	085*	- owned outright
	086*	- rent-free
087 to 089		Not used
090 to 096		Not used from 1981
097 to 099		Not used
100 to 106		Not used from 1981
107 to 109		Not used

Items from Household Schedule (Schedule A)

Code	Question Number	Item
		<u>Insurance on structure of dwelling</u>
110	Q43	- all tenure types
111*		- Council, rented unfurnished
112*		- other rented, unfurnished
113*		- rented, furnished
114*		- owned with mortgage
115*		- owned outright
116*		- rent-free
117 to 129		Not used
		<u>"Interest only" mortgages - interest paid</u>
130	Q33	- all sources
131*		- Building Society (derived from Code A119)
132*		- Local Authority (derived from Code A119)
133*		- Bank (derived from Code A119)
134*		- Insurance Company (derived from Code A119)
135*		- Other source (derived from Code A119)
136 to 148		Not used
149	Q54	Electricity - amount shown on COCD account (N Ireland only)
		<u>"Interest/Principal" mortgages - interest paid</u>
150	Q38	- all sources
151*		- Building Society (derived from Code A119)
152*		- Local Authority (derived from Code A119)
153*		- Bank (derived from Code A119)
154*		- Insurance Company (derived from Code A119)
155*		- Other source (derived from Code A119)
156		Not used from 1982
157		Not used from 1983
158	Q82	Amount paid for travel to state schools in last 7 days
159		Not used from 1983
160	Q84	Education fees
161		Not used from 1983
162	Q84	Fees paid for other courses
163	Q98	Value of OAP concessionary bus tokens or tickets
164	Q93	Education fees paid for person outside the household
165		Not used
166	Q50	Telephone account - own telephone
167		Not used from 1982
168	Q44/45	Insurance on contents of dwelling
169		Not used from 1980
170	Q56	Gas - amount paid in last account
171		Not used in 1985
172	Q66	Cash received from sale of vehicles
173	Q55	Gas - slot meter rebate
174	Q17	100% rent rebate/rent allowance/housing benefit

Items from Household Schedule (Schedule A)

Code	Question Number	Item
175	Q56	Electricity - amount paid in last account
176		Not used from 1981
177		Not used from 1981
178	Q55	Electricity - slot meter rebate
179	Q67	Refund of Road Fund Tax
180	Q75	Bank charges
181	Q51	Licences - Television
182	Q65	Credit purchases - second hand cars/vans
183	Q65	Credit purchases - new cars/vans
184		Not used from 1983
185	Q51	Licences - Other licences (except driving)
186	Q51	Licences - Driving
187	Q64	Motor vehicle tax
188	Q64	Motor vehicle insurance
189	Q14	Garage rent
190	Q29	Amount of Housing Benefit Supplement
191	Q68	All other season tickets including bus and tube only - other (see codes 219 and 255)
192		Not used from 1982
193		Not used from 1981
194	Q48	TV slot meter rebate
195	Q48	TV rental - amount paid on last account
196	Q46	Life assurance taken out before April 1984
197	Q46	Life assurance taken out April 1984 or later
198	Q46	House purchase endowment taken out April 1984 or later
199	Q46	Insurance premiums on mortgage endowment policies taken out before April 1984
		<u>"Interest/Principal" mortgages - last instalment</u>
200	Q36	- all sources
201*		- Building Society (derived from Code A119)
202*		- Local Authority (derived from Code A119)
203*		- Bank (derived from Code A119)
204*		- Insurance Company (derived from Code A119)
205*		- Other source (derived from Code A119)
206	Q47	Other (not life) insurances including friendly society premium
207	Q83	Income from scholarships - household total
208	Q46	Mortgage Protection Premiums: Policy taken out before April 1984
209	Q83	Value of private scholarships
210	Q83	Value of public scholarships
211	Q17	Heating cost included in rent
212	Q17	Other Services costs included in rent
213	Q46	Mortgage protection taken out April 1984 or later
214 to 218		Not used from 1981
219	Q68	Season ticket - rail only
220		Not used from 1981

Items from Household Schedule (Schedule A)

Code	Question Number	Item
	221	Q57 Gas - last payment under Board Budgeting Scheme
	222	Q57 Electricity - last payment under Board Budgeting Scheme
	223	Q59 Gas - amount shown on last account
	224	Q59 Electricity - amount shown on last account
225 to	228	Not used from 1981
	229	Q47 Medical insurance
	230	Q21 Partial rent rebate/rent allowance/housing benefit
	231	Water rate poundage
	232	Sewerage rate poundage
	233	Environmental service charge poundage
	234	Standing charge on water rates
	235	Standing charge on sewerage rates
	236	Not used from 1982
	237	Not used from 1981
	238	Not used from 1981
	239	Q75 Hire purchase - cash price
	240	Not used
	241	Q75 Hire purchase - part exchange allowance
	242	Q75 Hire purchase - down payment
	243	Q75 Hire purchase - original agreed instalment
	244	Q65 Outright purchases - new cars
	245	Q65 Outright purchases - second-hand cars
	246	Q64 Road fund tax paid in last 12 months on cars and vans currently owned.
	247	Q65 Outright purchases - new and second-hand motor cycles
248 to	253	Not used from 1983
	254	Q49 Last video rental payment
	255	Q68 Season tickets mixed - rail/bus/tube/combinations
	256	Not used from 1983
	257	Not used from 1983
	258	Not used from 1981
	259	Q80 School milk - imputed value
	260	Q81 School meals - cost
	261	Not used from 1981
	262*	Income of Chief Economic Supporter
	263	Q80 NMS liquid milk - imputed
	264*	Age of Chief Economic Supporter (f1 = 10 years)
	265	Not used from 1982
	266	Not used
	267	Q99 Imputed costs for certain business expense cases
	268	Not used from 1983
	269	Not used from 1979

Items from household Schedule (Schedule A)

Code	Question Number	Item
PAYMENTS BY BANKERS STANDING ORDER:		
270	Q78	AA/RAC subscriptions
271	Q78	Subs to golf clubs, sports clubs etc
272		Not used from 1984
273	Q78	Subs to TUs, professional organisations
274	Q78	Subs to magazines, periodicals
275	Q78	Other subscriptions
276	Q78	Savings
277		Not used from 1978
278	Q78	Cash gifts
279	Q78	Charitable gifts
280	Q78	Other payments by Bankers Order (except Fuel Oil used in central heating)
281		Not used in 1985
282 to 299		Not used

Items from Income Schedule (Schedule B)

Code	Question Number	Item
300,	301	Not used
	302	Q5 Gross earned income before retirement
	303	Q11 Last net wage/salary - main occupation
	304	Q13 PAYE Income tax refund - main occupation
	305	Q14 PAYE income tax deduction - main occupation
	306	Q15 NI contribution deducted from pay - main occupation
	307	Q36 Net loss from self-employment
	308	Not used from 1983
	309	Q32 Last net wage/salary - subsidiary occupation
	310	Q34 Tax deducted from last net wage/salary - subsidiary occupation
	311	Q34 NI contribution deducted from pay - subsidiary occupation
	312	Q24 Occasional additions to pay - bonuses etc (gross)
	313	Q36 Self-employment income if period covered is less than 12 months
	314	Not used from 1983
	315	Q23 Normal (gross) wage or salary, if different from last - main occupation only
	316	Q30 Value of luncheon vouchers used in last 7 days
	317	Not used from 1983
	318	Q16 Superannuation contributions deducted from pay - main occupation
	319	Q34 Superannuation conts and other deductions from pay - subsidiary occupation
	320	Q30 Value of free meals and food from employer in last 7 days
	321	Q83 Concessionary coal and coke - cost
	322	Q83 Concessionary coal and coke - imputed value
	323	Q51 Amount of housing benefit for all except HOH
	324	Q51 Amount of housing benefit supplement for all except for HOH
	325	Q57 Industrial injury disablement pension - last payment
	326	Q36 Self-employment income
	327	Q36 Value of self-supply goods
	328	Q36 Income from second self-employment
	329	Q23 Normal (net) wage or salary, if different from last - main occupation only
	330	Q24 Occasional additions to pay - bonuses etc (net)
	331	Not used from 1984
	332	Not used from 1984
	333	Q75 Interest on National Savings Bank Investment Account
	334	Q90 Money sent abroad to private individual and charity
	335	Not used from 1983
	336	Q43 NI contributions for self-employed and non-employed
	337	Q44 Family allowance; children's interim payment; child's benefit - current rate
	338	Q45 NI Retirement, old person's pension - current rate
	339	Q46 NI widow's benefits - current rate
	340	Q47 War disability pension and allowances - current rate
	341	Q61 Maternity allowance - last payment

Items from Income Schedule (Schedule B)

342	Q69	Current pension from public sector - last net payment
343	Q69	Current pension from public sector - amount of tax deducted
344	Q69	Current pension from private sector or TU - last net payment
345	Q69	Current pension from private sector - amount of tax deducted
346	Q70/71	Current annuity, trust/covenant/last net payment
347	Q70/71	Current annuity, trust/covenant/amount of tax deducted
348		Not used from 1984
349		Not used from 1984
350		Not used from 1983
351	Q73	Other deductions (excluding tax) from last pension payment
352	Q79	Allowances from friends, relatives, members of Armed Forces or Merchant Navy, alimony; separation allowances, allowances for foster children
353		Not used from 1982
354		Not used from 1982
355		Not used from 1983
356	Q67	Amount of redundancy pay received in last 12 months
357	Q67	Redundancy pay averaged over years of reckonable service
358		Not used from 1980
359		Not used from 1980
360	Q78	Income from property
361	Q88	Spender or child under-16 difference between annual value of education grant (Codes 209 & 210) and amount received in cash (Code 207)
362	Q58	NI Unemployment benefit - last payment
363	Q53	NI Sickness benefit/NI Industrial Injuries benefit - last payment
364		Not used from 1982
365	Q60	Supplementary benefit - last payment
366	Q68	Benefits from TUs, Friendly Societies etc - last payment
367	Q65	Other State benefits - last payment
368	Q59	Family Income Supplement - last payment
369	Q54	Contributory invalidity pension and allowance - last payment
370	Q25	Amount of tax relief claimed for employment expenses
371	Q75	Interest on Trustee Savings Bank deposits
372		Not used from 1979
373	Q75	Interest on National Savings Bank Ordinary Savings Account
374	Q75	Interest on other savings or bank deposits
375		Not used from 1983
376	Q75	Interest on Building Society shares and deposits
377		Not used from 1981
378	Q77	Interest on stocks, shares, bonds, debentures, unit trust LA securities etc
379		Not used from 1979
380	Q86	Net usual pay before becoming sick or un-occupied

Items from Income Schedule (Schedule b)

381	Q86	Other earned income from odd jobs, occasional fees etc
382	Q56	TOPS, YOPS allowance - last payment
383	Q85	Earnings as mail order agent, baby sitter
384	Q88	Other unearned income
385	Q80	Married man's/women's allowance from absent wife/husband
386	Q89	NI contributions paid direct
387	Q87	Tax paid direct to Inland Revenue - income tax
388	Q52	Statutory Sick Pay - last gross payment
389		Not used from 1984
390	Q88	Income tax refund - other than PAYE
391	Q88	Income tax refund deleted (from Code 390)
392		Income from scholarships - spender or child under 16
393		Not used from 1981
394	Q66	Lump sum Christmas bonus to pensioners
395		Not used in 1984
396	Q91	Other income of child under 16
397	Q91	Expenditure by child under 16
398		Not used from 1982
399		Not used
400		Not used from 1982
401		Not used from 1984
402		Not used from 1982
403		Not used from 1982
404		Not used from 1982
405		Not used from 1979
406	Q62	NI Maternity grant
407	Q64	NI Death grant
408	Q77	Interest on British Savings Bond, War Loan
409		Not used from 1982
410		Not used from 1982
411		Not used from 1981
412		Not used from 1981
413		Not used from 1982
414		Not used from 1982
415		Not used from 1984
416		Not used from 1982
417	Q48	Mobility allowance
418	Q49	Non-contributory and housewives non-contributory invalidity pension
419		Not used from 1983
420		Not used from 1983
421	Q50	Attendance allowance

Items from Income Schedule (Schedule B)

DEDUCTIONS FROM PAY: MAIN OCCUPATION

422	Q16	Participant sports and specialised pastimes
423		Not used from 1984
424	Q16	Subscriptions to TUs, Professional Associations etc
425	Q16	Other subscriptions
426	Q16	Charitable gifts
427	Q16	Miscellaneous expenditure on services
428	Q16	Cash gifts not allocated elsewhere
429	Q16	All other codes not specified above

FAMILY EXPENDITURE SURVEY 1985

LIST OF PRODUCT CODES

Notes

1. Unless stated otherwise, product codes are formed for positive results only.
2. For product codes having values in sterling, results are recorded on tape in tenths of pence. Therefore when multiplying together two monetary values (eg codes 211P to 216P) it is necessary to divide the product by 100 to keep the results in tenths of pence.
3. For product codes having numerical values, results are multiplied by 10 when recorded on tape (eg product codes having a value of one are recorded on tape with a value of 10; age of head 25 is recorded as 250).
4. Codes 001P to 199P are calculated for each person. Codes 200P and above are calculated for each household.
5. Items from the diary record books, aggregated over the 14 days of record keeping, are shown in this list as 4-digit code numbers ending in zero. These codes are recorded on tape with a number in the fourth position to indicate the week. An explanation of the suffix letters used with these codes is given in Appendix 6.
6. Unless stated otherwise (eg codes 251P to 256P) all monetary values appear as weekly equivalents. Rateable values (codes 071 to 076) appear on the household schedule as annual values but are recorded on tape as weekly equivalents; rate poundages (codes 081 to 086) appear on both the schedule and tape as weekly values.

FAMILY EXPENDITURE SURVEY 1985

LIST OF PRODUCT CODES

Unless stated otherwise, product codes are formed¹ for positive answers only.

Code	Description
<u>Personal Product Codes (calculated for each individual)</u>	
001P	Take home pay, less tax refund, last time paid (main employment) - code 303 minus code 304.
002P	Take home pay, less tax refund, last week/month (main employment).- if code A 250 has a value of 1, code 001P.
003P	Gross wage/salary last time paid (main employment):- sum of codes 001P, 305, 306, 318, 422, 424 to 429.
004P	Gross wage/salary last week/month (main employment):- if code A 250 has a value of 1, code 003P.
005P	Gross wage/salary last time paid (main employment), 13 week rule applied - if code A 208 is not coded or has a value of less than 14, or code A 209 has a value of 1 or 2, code 003P.
006P	Normal take home pay (actual pay for persons working less than 8 hours per week):- if code 329 is coded, sum of codes 329 and 330, if code 329 is not coded, sum of codes 001P and 330.
007P	Normal gross wage/salary:- sum of codes 006P, 305, 306, 312, 318, 422, 424 to 429 minus code 330.
008P	Normal gross wage/salary, 13 week rule applied.- if code A 208 is not coded or has a value of less than 14, or code A 209 has a value of 1 or 2, code 007P.
009P	Current contributory invalidity pension/allowance - If code A 259 is present, code 369.
010P	Current TOPS/YOPS allowance.- If code A 273 is present, code 382.
011P	Not used from 1984.
012P	Take home pay last week/month (subsidiary employment).- if code A 255 is present, code 309.

Code	Description
013P	Current Family Income Supplement:- If code A 257 is present, code 368.
014P	Gross wage/salary last week/month (subsidiary employment):- if code A 255 is present, sum of codes 309, 310, 311, 319.
015P	Gross wage/salary last time paid (subsidiary employment):- sum of codes 309, 310, 311, 319.
016P	Current industrial injury disablement pension:- If code A 238 is present, code 325.
017P	Male child aged under 18:- If sex is male, if age is less than 18, if marital status is 3 or 4 (single), the product code has a value of 1.
018P	Female child aged under 18:- If sex is female, if age is less than 18, if marital status is 3 or 4 (single), the product code has a value of 1.
019P	Male adult:- If sex is male, if 017P is not coded, the product code has a value of 1.
020P	Not used from 1984.
021P	Person working (new definition as from 1982):- If code A 201 has a value from 1 to 4, code A 210 is coded and code A 208 has a value of less than 53, the product code has a value of 1, unless code A 201 has a value of 2, code 326 has a value of greater than 1 and less than £5.00 and code A 203 has a value of 20 or 22.
022P	Current unemployment benefit:- If code A 223 is present, code 362.
023P	Current sickness/industrial injury benefit:- If code A 225 is present, code 363.
024P	Female adult:- If sex is female, if code 018P is not coded, the product code has a value of 1.
025P	Current Supplementary allowance:- If code A 229 is present, code 365.
026P	Current TU sick/strike pay, Friendly Society benefits etc, included in income calculation:- If code 008P is not coded, if code A 231 is present, code 366.
027P	Current Other Social Security benefits:- If code A 233 is present, code 367.

Code	Description
028P	Social Security benefits concurrent with earnings:- If code A 250 has a value of 1, and either code A 208 is not coded or code A 209 has a value of 1 or 2, sum of codes 009P, 022P, 023P, 025P.
029P	NI contributions paid by non-employees:- Sum of codes 336 and 386, minus sum of codes 306 and 311.
030P	Social Security and other benefits excluded from income calculation by operation of 13 week rule.- If code 008P is coded, sum of codes 009P, 010P, 022P, 023P, 025P minus 028P, plus, if code A 231 is present, code 366, plus, if code A 240 is present, code 341.
031P	Social Security benefits included in income calculation:- Sum of codes 013P, 016P, 027P, 028P, 337, 338, 339, 340, 394, 417, 418, 421 plus if code 008P is not coded, codes 009P, 010P, 022P, 023P, 025P, plus, if code A 240 is coded, code 341.
032P	Current maternity allowance:- If code A 240 is present, code 341.
033P	Social Security Retirement, Old Age, Widows pensions:- Sum of codes 338 and 339.
034P	Industrial injury disablement pension; family allowance/child benefit, war disability pension; lump sum Christmas bonus to pensioners; mobility allowance, non-contributory invalidity pension, attendance allowance sum of codes 016P, 337, 340, 394, 417, 418, 421.
035P	Retired and of minimum NI pension age:- If code A 201 has a value of 6 and sex is male and age greater than 64, or sex is female and age greater than 59, the product code has a value of 1.
036P	Unoccupied and of minimum NI pension age:- If code 021P is not coded and code A 201 is not coded value 6, and sex is male and age greater than 64, or sex is female and age greater than 59, the product code has a value of 1.
037P	Income from subsidiary self-employment:- If code A 214 is coded and code A 201 has a value of 1, 3 or 4, sum of codes 326 and 328. If code A 214 is coded and code A 201 has a value of 2, code 328.

Code	Description
038P	Head seeking work not previously employed:- If code A 001 has a value of 1, if code A 201 has a value of 3 or 4, if code A 210 is not coded, the product code has a value of 1.
039P	Not used from 1984.
040P	Public sector pension from own employment (gross):- If code A 236 has a value of 3, sum of codes 342 and 343.
041P	Public sector pension from spouse's employment (gross):- If code A 236 has a value of 4, sum of codes 342 and 343.
042P	Private sector pension from own employment (gross):- If code A 237 has a value of 3, sum of codes 344 and 345.
043P	Private sector pension from spouse's employment (gross):- If code A 237 has a value of 4, sum of codes 344 and 345.
044P	Tax on interest/dividends from stocks, shares, LA securities etc:- Code 378 multiplied by factor 0.4286.
045P	Self-supply goods:- Code 327.
046P	Tax on interest from Building Society shares and deposits:- Code 376 multiplied by 0.3378
047P	Income from self-employment (main or only occupation):- If code A 201 has a value of 2, sum of codes 326, 328, minus code 037P.
048P	Income from investments:- Sum of codes 044P, 046p, 333, 360, 371, 373, 374, 376, 378, 384, 408.
049P	Income from pensions, annuities:- Sum of codes 342, 343, 344, 345, 346, 347.
050P	Income from other sources:- Sum of codes 026P, 316, 352, 381, 385, 392, 396 minus codes 361, plus, if code A 275 is coded, code 383.
051P	Total personal gross income (normal):- Sum of codes 008P, 015P, 031P, 037P, 047P, 048P, 049P, 050P.
052P	Person seeking work, not previously employed:- If code A 201 has a value of 3 or 4, if code A 210 is not coded, the product code has a value of 100 for males, 200 for females.

Code	Description
053P	Total personal gross income (current).- Sum of codes 004P, 015P, 030P, 031P, 037P, 047P, 048P, 049P, 050P plus, if code A279 is present, code 388.
054P	Subsidiary job held.- If either code A 212 or code A 214 is coded, the product code has a value of 1.
<u>Betting, payments less winnings (negative answers acceptable).-</u>	
055P	Football pools - code 8110 minus code 8210
056P	Bookmaker - code 8120 minus code 8220
057P	Lotteries - code 8130 minus code 8230
058P	Other betting - code 8140 minus code 8240
059P	Not used in 1985
<u>Pensioner income:-</u>	
060P	a. If sex is male, if age is greater than 59 but less than 65, sum of codes 016P and 340, 394 plus, if either code 016P or code 340 is coded and code 008P is not coded, code 025P.
061P	b. If sex is female and age is greater than 59, or if sex is male and age is greater than 64, sum of codes 016P, 028P, 338, 339, 340, 394, 417, 418, 421.
062P	c. If code 008P is not coded, if sex is female and age is greater than 59, or if sex is male and age is greater than 64, sum of codes 022P, 023P, 025P, 009P.
<u>Components of normal gross wage/salary, 13 week rule applied</u>	
063P	NI employees contribution.- Code 311, plus, if code 008P is coded, code 306.
064P	(Check code for use within DE).
065P	PAYE tax deduction.- Code 310, plus, if code 008P is coded, code 305.
066P	PAYE tax refund.- If code A 208 is not coded, or has a value of less than 14, or code A 209 has a value of 1 or 2, code 304.
067P	Income tax, payments less refunds, 13 week rule applied (negatives acceptable) - Sum of codes 044P, 046P, 065P, 343, 345, 347, 387, minus sum of codes 066P, 390.

Code	Description
068P	TV slot meter payments:- Code 7680.
069P	Gas slot meter payments:- Code 2540.
070P	Electricity slot meter payments:- Code 2550.
071P	Current superannuation contributions:- If either code A 250 or code A 255 is coded, sum of codes 318, 319.
072P	Male, single, aged 16 to 18:- If code 017P is coded and code A 005 is greater than 15, the product code has a value of 1.
073P	Female, single aged 16 to 18:- If code 018P is coded and code A 005 is greater than 15, the product code has a value of 1.
074P	Not used from 1984.
075P	Current NI employees contribution:- If either code A250 or code A 255 is coded, sum of codes 306 and 311.
076P	Not used from 1984.
077P	Current PAYE tax deduction:- If either code A 250 or code A 255 is coded, sum of codes 305 and 310.
078P	Current PAYE tax refund:- If code A 250 is coded, code 304.
079P	Income tax payments less refunds (negative answers acceptable):- Sum of codes 044P, 046P, 077P, 343, 345, 347, 387, minus sum of codes 078P, 390.
<u>Product Codes for Head of Household</u> (calculated for persons where code A 001 has a value of 1)	
080P	Normal gross wage/salary (13 week rule applied):- Code 008P
081P	Head of household unemployed:- If code A 201 has a value of 3, the product code has a value of 1.

Code	Description
082P	Gross wage/salary last week/month (subsidiary employment) - Code 014P.
083P	Gross wage/salary last time paid (subsidiary employment)- Code 015P.
084P	Head of household economically active:- Code 021P.
085P	Self-employment income - Sum of codes 037P and 047P.
086P	Income from investments.- Code 048P.
087P	Income from pensions, annuities.- Code 049P.
088P	Social Security retirement, Old Age, Widows pensions - Code 033P.
089P	Other Social Security benefits:- Code 031P minus code 033P.
090P	Income from other sources:- Code 050P.
091P	Total personal gross income (normal).- Code 051P.
092P	Occupation of head.- Code A 210.
093P	Total personal gross income (current):- Code 053P.
094P	Age of head of household:- Code A 005.
095P	Income in kind from Schedule B.- Sum of codes 320, 322, 327.
096P	Head of household retired and of minimum NI pension age - Code 035P.
097P	Head of household unoccupied and of minimum NI pension age.- Code 036P.
098P	Male head of household.- If Code A 004 has a value of 1, the product code has a value of 1.

Code	Description
099P	Sex of spouse of head of household:- If code A 002 has a value of 1, code A 004.
	<u>Product Codes for Wife of Head of Household</u> (calculated for persons where relationship (code A 002) has a value of 1 and sex (code A 004) has a value of 2)
100P	Normal gross wage/salary (13 week rule applied):- Code 008P.
101P	Wife of head unemployed:- If code A 201 has a value of 3, the product code has a value of 1.
102P	Gross wage/salary last week/month (subsidiary employment):- Code 014P.
103P	Gross wage/salary last time paid (subsidiary employment):- Code 015P.
104P	Wife of head economically active:- Code 021P.
105P	Self-employment income:- Sum of codes 037P and 047P.
106P	Income from investments:- Code 048P.
107P	Income from pensions, annuities:- Code 049P.
108P	Social Security Retirement, Old Age, Widows pensions:- Code 033P.
109P	Other Social Security benefits:- Code 031P minus code 033P.
110P	Income from other sources:- Code 050P.
111P	Total personal gross income (normal):- Code 051P
*112P	Person with company provided car:- If code A285 has a value of 1 or 2, the product code has a value of 1.
*	Code 112P applies to all persons, it is not restricted to Wife of Head of Household.

Code	Description
113P	Total personal gross income (current):- Code 053P.
114P	Age of wife of head - Code A 005.
115P	Income in kind from Schedule B.- Sum of codes 320, 322, 327.
<u>Personal Expenditure items from record books and Schedule B</u>	
116P	Housing:- Sum of codes 2240, 2310 to 2360, 2390, 7850.
117P	Fuel, light, power.- Sum of codes 321, 2250, 2260, 2400 to 2610.
118P	Food:- Sum of codes 1010 to 1990, 8400 to 8570.
119P	Alcoholic Drink:- Sum of codes 2800 to 2990. --
120P	Tobacco.- Sum of codes 2110 to 2130.
121P	Clothing and Footwear.- Sum of codes 3010, 3030 to 3210, 3230 to 3490
122P	Durable Household Goods.- Sum of codes 4010 to 4200, 4220-4360, 6010, 6030, 6040, 7600, 7840, 7860.
123P	Other Goods.- Sum of codes 6110 to 6480, 7210 to 7490.
124P	Transport and Vehicles:- Sum of codes 5010 to 5030, 5050 to 5590.
125P	Services:- Sum of codes 334, 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, plus, if code A250 is coded, sum of codes 422, 424 to 428.
126P	Miscellaneous.- Sum of codes 397, 7500, 8010.
127P	Total personal expenditure:- Sum of codes 116P to 126P.
128P	Other payments (negative answers acceptable) - Sum of codes 029P, 055P to 058P, 071P, 075P, 079P, 2160 to 2230, 8030.

Code	Description
129P	Expenditure on permanent second dwelling:- Sum of codes 2250 to 2290.
<u>CSO Personal Product Codes</u>	
130P	Unemployment benefit, TUPS/YOPS allowance averaged over number of weeks received:- Code 362, multiplied by code A 222, divided by 52, plus code 382, multiplied by code A 249, divided by 52.
131P	Sickness/Industrial Injury benefit, averaged over number of weeks received:- Code 363, multiplied by code A 224, divided by 52.
132P	Superannuation contributions averaged over number of weeks at work in last 12 months:- Sum of codes 318, 319, multiplied by (52 minus sum of codes A 222, A 224, A 249, A 258) divided by 52.
133P	Invalidity pension averaged over number of weeks received:- Code 369, multiplied by code A 258, divided by 52.
134P	Family Income Supplement, averaged over number of weeks received:- Code 368, multiplied by code A 256, divided by 52.
135P	Industrial Injury disablement benefit averaged over number of weeks received:- Code 325, multiplied by code A 205, divided by 52.
136P	"Usual" weekly employer's contribution to Nat Insurance (main and subsidiary employment):- Sum of codes 306 and 311, multiplied by 1.87.
137P	TU/Friendly Society benefits, averaged over number of weeks received:- Code 366, multiplied by code A 230, divided by 52.
138P	Maternity allowance averaged over number of weeks received:- Code 341 multiplied by code A 239 divided by 52.
<u>Abatement from employment income</u>	
139P	PAYE tax deduction (main and subsidiary employment):- Sum of codes 305 and 310, multiplied by sum of codes A 222, A 224, A 249, A 258, divided by 52.
140P	NI contribution (main and subsidiary employment):- Sum of codes 306 and 311, multiplied by sum of codes A 222, A 224, A 249, A 258, divided by 52.

Code	Description
141P	Normal take-home pay, including net bonus (main and subsidiary employment):- Sum of codes 006P and 309, multiplied by sum of codes A 222, A 224, A 249, A 258 divided by 52.
142P	Other deductions from pay (main and subsidiary employment).- Sum of codes 422 to 429, multiplied by sum of codes A 222, A 224, A 249, A 258, divided by 52.
143P	Meal vouchers.- Code 316 multiplied by sum of codes A 222, A 224, A 249, A 258, divided by 52.
144P	NOT USED FROM 1984
145P	NOT USED FROM 1984

Personal expenditure on house repairs/maintenance

146P	Payments to contractors = code 2240, 7850.
147P	Paint and distemper = code 2310....
148P	Wallpaper = code 2320.
149P	Timber and hardboard = code 2330.
150P	Other materials = code 2340.
151P	Fittings = code 2350.
152P	Tools = code 2360.
153P	Composite purchases of materials = code 2390.
154P)
)
155P)
)
156P)
) Check codes for use within DE
157P)
)
158P)
)
159P)
)

Code	Description
160P	Current supplementary benefit received by head or wife of family unit No. 1:- If code A 008 has a value of 1, if code A 009 has a value of 1 or 2, code 025P.
161P	Economic activity of head of household:- If code A001 has a value of 1, code A 201.
162P	Pensioner Income (CSO):- If age (code A 005) is greater than 59, if code A 201 has a value of more than 4 (ie retired/unoccupied), code 051P.

Personal Components of Net Household Income

163P	Imputed income from Schedule B:- Sum of codes 320, 322, 327.
164P	Income from Schedule B:- Sum of codes 006P, 025P, 027P, 130P to 135P, 137P, 138P, 304, 309, 316, 326, 328, 333, 337 to 340, 342, 344, 346, 352, 357, 360, 371, 373, 374, 376, 378, 381, 383 to 385, 390, 394, 396, 406 to 408, 417, 418, 421, 422, 424 to 429 minus the sum of codes 029P, 141P to 143P, 387.
165P	Normal hourly earnings (main employment):- Code 008P divided by code A220.

Personal Components of Original Household Income

166P	Income from Schedule B:- Sum of codes 006P, 044P, 046P, 132P, 137P, 305, 306, 309 to 312, 316, 326, 328, 333, 342 to 347, 352, 360, 371, 373, 374, 376, 378, 381, 383 to 385, 396, 408, 422, 424 to 429 minus the sum of codes 139P to 143P, 330.
167P	Cash benefits from Schedule B:- Sum of codes 025P, 027P, 130P, 131P, 133P, 134P, 135P, 138P, 337 to 340, 357, 394, 406, 407, 417, 418, 421.
168P	Person aged 80 or over working or seeking work:- If code A 201 has a value of 1 to 4 and code A 005 is greater than 79, the product code has a value of 1.
169P	Current earnings from work as a mail order agent and/or baby sitter:- If code A275 is present, code 383.
170P	Tax Unit income from Schedule B:- Sum of codes 006P, 044P, 046P, 305, 306, 309 to 312, 326, 328, 333, 338, 339, 342 to 347, 360, 371, 373, 374, 376, 378, 381, 384, 396, 408, 422, 424 to 429, minus the sum of codes 139P to 142P, 330.

Code	Description
171P	Earned income before retirement:- If code A 206 has a value of 1, but less than 52, if code A 201 has a value of 6, 52 minus code A 206, divided by 52, multiplied by code 302.
172P	DE Check code.
173P	Current Statutory Sick Pay:- If code A279 is present, code 388.
174P	Consumers expenditure (personal expenditure from record books and Schedule B).- Sum of codes 071P, 127P.
175P	Social Security benefits received by employees away from work without pay more than 2 weeks - If code A 208 has a value of more than 2, and code A 209 is not coded or has a value of 3, sum of codes 009P, 010P, 022P, 023P, 025P, 032P, 173P.
176P	Total personal gross income (2 week rule):- Sum of codes 013P, -016P, 027P, 028P, -033P, -034P, 037P, 047P to 050P, 175P, if code A 208 is not coded or has a value of less than 3, or code A 209 has a value of 1 or 2, plus codes 007P and 015P.
177P	Personal gross income, less tax and NI conts (negative answers acceptable):- Code 051P minus sum of codes 029P, 075P, 079P.
178P	Person unemployed.- If code A 201 has a value of 3, the product code has a value of 1.
179P	Scholarship income from Schedule B:- Sum of code 392, minus code 361. <u>Deductions from Pay, if Current</u>
180P	Participant sports and specialised pastimes:- If code A250 is coded, code 422.
181P	Not used from 1984.
182P	Subscriptions to TUs, Professional Associations etc:- If code A250 is coded, code 424.

Code	Description
183P	Other subscriptions:- If code A250 is coded, code 425.
184P	Charitable gifts:- If code A250 is coded, code 426.
185P	Miscellaneous expenditure on services:- If code A250 is coded, code 427.
186P	Cash gifts not allocated elsewhere:- If code A250 is coded, code 428.
187P	All other codes not specified above:- If code A250 is coded, code 429.
188P	Normal gross wage/salary of employees at work:- If code 004P is coded, code 007P.
189P	Total personal gross income (current) using normal wage/salary of employees at work:- Sum of codes 015P, 030P, 031P, 037P, 047P, 048P, 049P, 050P, 188P.
190P	Tax Unit identifier:- If code A 009 has a value of 1 or if code A 006 has a value of 2 and code A 009 has a value of 2, the product code has a value of 100.

Inland Revenue Income

Income assessable to tax

191P	Head of Tax Unit:- If code A 009 has a value of 1, sum of codes 004P, 014P, 022P, 027P, 037P, 044P, 046P, 047P, 169P, 173P, 333, 338, 339, 342 to 347, 352, 360, 371, 373, 374, 376, 378, 381, 384, 385, 408, minus code 071P, plus if code A201 has a value of 3, code 025P.
192P	CHECK CODE.
193P	Wife of Head of Unit:- If code A 009 has a value of 2, sum of codes 004P, 014P, 022P, 027P, 037P, 044P, 046P, 047P, 169P, 173P, 333, 338, 339, 342 to 347, 352, 360, 371, 373, 374, 376, 378, 384, 385, 408, minus code 071P, plus if code A201 has a value of 3, code 025P.
194P	Other members of Unit:- If code A 009 has a value of 3, sum of codes 004P, 014P, 022P, 027P, 037P, 044P, 046P, 047P, 169P, 173P, 333, 338, 339, 342 to 347, 352, 360, 371, 373, 374, 376, 378, 384, 385, 408, minus code 071P, plus if code A201 has a value of 3, code 025P.

Code	Description
<u>Income not assessable to tax</u>	
195P	Head of Tax Unit - If code A 009 has a value of 1, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 394, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P.
196P	Wife of Head of Unit:- If code A 009 has a value of 2, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P.
197P	Other members of Unit:- If code A 009 has a value of 3, sum of codes 009P, 010P, 013P, 016P, 023P, 025P, 026P, 032P, 071P, 179P, 337, 340, 356, 381, 394, 396, 417, 418, 421, and, if code A201 has a value of 3, minus code 025P.
198P	DE check code.
199P	Normal gross weekly earnings of employees, main and subsidiary occupation.- Sum of codes 007P, 015P.
<u>Household Product Codes (calculated for each household)</u>	
200P	Number of rooms occupied (DE basis).- Code A 112 divided by 2, plus code A 111.
201P	Number of rooms occupied (CSO basis):- Code A 112 divided by 2, plus codes A 111 and A 115.
202P	Total number of rooms (CSO basis).- Sum of codes A 114 and A 115.
203P	Current Supplementary Benefit received by head or wife of head of household - Code 160P
204P	Housing Benefits for Certificated Claimants.- If codes 203P present, sum of codes 041 to 047, 174, 230. If code A173 is present, minus code 041 to 047.

Code

Description

Rates rebate:-

205P	Tenure type 1 = If code A 120 has a value of 1, sum of codes 041 and 047.
206P	Tenure type 2 = If code A 120 has a value of 2, sum of codes 042 and 047.
207P	Tenure type 3 = If code A 120 has a value of 3, sum of codes 043 and 047.
208P	Tenure type 4 = If code A 120 has a value of 4, sum of codes 044 and 047.
209P	Tenure type 5 = " " A 120 has a value of 5, sum of codes 045 and 047.
210P	Tenure type 6 " " " A 120 has a value of 6, sum of codes 046 and 047.

Calculated rates:-

211P	Tenure type 1 = Code 071 Multiplied by code 081 divided by 100.
212P	Tenure type 2 = Code 072 " " code 082 " "
213P	Tenure type 3 = Code 073 " " code 083 " "
214P	Tenure type 4 = Code 074 " " code 084 " "
215P	Tenure type 5 = Code 075 " " code 085 " "
216P	Tenure type 6 = Code 076 " " code 086 " "

Constants for adjusted rateable values:-

217P	Constant S (Northern Ireland). If code A 098 has a value greater than 11, the product code has a value of 5049 (1st quarter) 5258 (2nd quarter) 5342 (3rd quarter) 5583 (4th quarter)
218P	Constant T (Scotland). If code A 098 has a value of 11, the product code has a value of 1776 (1st quarter) 1821 (2nd quarter) 1839 (3rd quarter) 1890 (4th quarter)
219P	Constant U (England and Wales). If code A 098 has a value of less than 11, the product code has a value of 4256 (1st quarter) 4358 (2nd quarter) 4399 (3rd quarter) 4514 (4th quarter)
220P	Housing Benefit/Rent Rebate or Allowance/Rate Rebate:- Sum of codes 041 to 047, 174, 230. If A173 is present minus code 041 to 047.

Code

Description

Calculated rates, less rates rebate.-

221P	Tenure type 1 = Code 211P minus code 205P
222P	Tenure type 2 = Code 212P " " 206P
223P	Tenure type 3 = Code 213P " " 207P
224P	Tenure type 4 = Code 214P " " 208P
225P	Tenure type 5 = Code 215P " " 209P
226P	Tenure type 6 = Code 216P " " 210P

Housing Benefit/Rent Rebate or Allowance/Rate Rebate

227P	Tenure type 1 = If code A120 has a value of 1, code 220P
228P	Tenure type 2 = If code A120 has a value of 2, code 220P
229P	Tenure type 3 = If code A120 has a value of 3, code 220P
230P	Tenure type 4 = If code A120 has a value of 4, code 220P
231P	Tenure type 5 = If code A120 has a value of 5, code 220P
232P	Tenure type 6 = If code A120 has a value of 6, code 220P

100% Housing Benefit:-

233P	Tenure type 1 = If code A 120 has a value of 1, code 174.
234P	Tenure type 2 = If code A 120 has a value of 2, code 174.
235P	Tenure type 3 = If code A 120 has a value of 3, code 174.

Partial Housing Benefit

236P	Tenure type 1 = If code A120 has a value of 1, code 230
237P	Tenure type 2 = If code A120 has a value of 2, code 230
238P	Tenure type 3 = If code A120 has a value of 3, code 230

Owner-occupiers rateable value:-

239P	Tenure type 4 = Code 074 divided by code 200P multiplied by code A 114.
240P	Tenure type 5 = Code 075 divided by code 200P multiplied by code A 114.

Gross value (weekly values)

241P	Tenure Type 1 =
	a. RV less than £37 pa Code 071 multiplied by 1.32
	b. RV £37 but less than £81 pa Code 071 multiplied by 1.43, plus 26
	c. RV £81 but less than £238 pa Code 071 multiplied by 1.20, plus 61
	d. RV £238 " " " £248 pa Code 071 plus 154
	e. RV £248 " " " £331 pa Code 071 multiplied by 1.25, plus 33.7
	f. RV £331 and over Code 071 multiplied by 1.20, plus 65.4
242P	Tenure type 2 = Formula as for code 241P, but using code 072.
243P	Tenure type 3 = Formula as for code 241P, but using code 073.
244P	Tenure type 4 = Formula as for code 241P, but using code 074.
245P	Tenure type 5 = Formula as for code 241P, but using code 075.
246P	Tenure type 6 = Formula as for code 241P, but using code 076.
247P	Motor vehicle tax, less refunds (negative answers acceptable):- Code 167, minus code 179.
248P	TV Slot meter payments, less rebates (negative answers acceptable):- Code 068P minus code 194.
249P	Gas, slot meter payments less rebates (negative answers acceptable):- Code 069P minus code 173.
250P	Electricity, slot meter payments less rebates (negative answers acceptable):- Code 070P minus code 176.
251P	Not used in 1985
252P	" " " "
253P	" " " "
254P	" " " "
255P	" " " "
256P	" " " "

Gross rent (including rates if not paid separately)

257P	Tenure type 1 = If code A120 has a value of 1, sum of codes 011, 021, 174, 230.
258P	Tenure type 2 = If code A120 has a value of 2, sum of codes 012, 022, 174, 230.
259P	Tenure type 3 = If code A120 has a value of 3, sum of codes 013, 023, 174, 230.
260P	Not used from 1983

Code	Description
261P	Number of persons with company provided car(s) in Household:- Code 112P.
262P	Household with company provided car(s) and privately owned car(s)- If code 261P is present and code A149 is present, the product code has a value of 1.
263P)	
264P)	
265P)	NOT USED.
266P)	
	<u>Adjusted rateable values:-</u>
267P	Tenure type 4 = Code 239P, multiplied by sum of codes 217P, 218P, 219P, divided by 1,000.
268P	Tenure type 5 = Code 240P, multiplied by sum of codes 217P, 218P, 219P, divided by 1,000.
269P	Tenure type 6 = Code 076, multiplied by sum of codes 217P, 218P, 219P, divided by 1,000.
270P	NOT USED.
	<u>Calculated Gross Rent/Water Charges</u>
271P	Tenure type 1 = Sum of codes 011, 021, 031, 051, 227P, minus code 211P.
272P	Tenure type 2 = Sum of codes 012, 022, 032, 052, 228P minus code 212P.
273P	Tenure type 3 = Sum of codes 013, 023, 033, 053, 229P minus code 213P.
274P	Not used from 1981.
275P	Not used from 1981.
276P	NOT USED.
277P	Income from owner-occupation.- Sum of codes 267P, 268P, 269P.
278P	Not used from 1981.
279P)	
280P)	NOT USED.

Code	Description
<u>Net Housing Costs (including certificated rent and rates rebates and allowances):-</u>	
281P	Tenure type 1 = Sum of codes 011, 021, 031, 051, 061, 111.
282P	Tenure type 2 = Sum of codes 012, 022, 032, 052, 062, 112.
283P	Tenure type 3 = Sum of codes 013, 023, 033, 053, 063, 113.
284P	Tenure type 4 = Sum of codes , 267P, 034, 054, 064, 114.
285P	Tenure type 5 = Sum of codes , 268P, 035, 055, 065, 115.
286P	Tenure type 6 = Sum of codes , 269P, 036, 056, 066, 116.
287P) 288P)	NOT USED.
289P	Income in kind from Schedule A:- Sum of codes 259, 263.
290P	NOT USED.
291P	Not used in 1985
292P	" " " "
293P	" " " "
294P	" " " "
295P	" " " "
296P	" " " "
297P	Households with less than 3 rooms:- If code A 114 is less than 3 the product code has a value of 1.
298P	Households with 3 to 5 rooms:- If code A 114 has a value of 3, 4 or 5, the product code has a value of 1.
299P	Households with 6 or more rooms:- If code A 114 is greater than 5, the product code has a value of 1.
<u>Normal gross wages/salaries (main employment) 13 week rule applied:-</u>	
300P	Household = Code 008P.
301P	Head = Code 080P.
302P	Wife = Code 100P.
303P	Others = Code 300P, minus sum of codes 301P, 302P.

Code	Description
304P)	
305P)	
306P)	NOT USED.
307P)	
<u>Gross wage/salary last week/month (subsidiary employment):-</u>	
308P	Household = Code 014P.
309P	Head = Code 082P.
310P	Wife = Code 102P.
311P	Others = Code 308P, minus sum of codes 309P, 310P.
<u>Gross wage/salary last time paid (subsidiary employment).-</u>	
312P	Household = Code 015P.
313P	Head = Code 083P.
314P	Wife = Code 103P.
315P	Others = Code 312P, minus sum of codes 313P, 314P.
316P)	
317P)	NOT USED.
318P)	
319P)	
<u>Income from self-employment.-</u>	
320P	Household = Sum of codes 037P, 047P.
321P	Head = Code 085P.
322P	Wife = Code 105P.
323P	Others = Code 320P, minus sum of codes 321P, 322P.
<u>Income from investments:-</u>	
324P	Household = Code 048P.
325P	Head = Code 086P.
326P	Wife = Code 106P.
327P	Others = Code 324P, minus sum of codes 325P, 326P.
<u>Incomes from pensions, annuities:-</u>	
328P	Household = Code 049P.
329P	Head = Code 087P.
330P	Wife = Code 107P.
331P	Others = Code 328P, minus sum of codes 329P, 330P.

Code

Description

Social Security Retirement, Old Age, Widows pension:-

332P Household = Code 033P.
333P Head = Code 088P.
334P Wife = Code 108P.
335P Others = Code 332P, minus sum of codes 333P, 334P.

Other Social Security benefits:-

336P Household = Code 031P, minus code 033P.
337P Head = Codes 089P.
338P Wife = Code 109P.
339P Others = Code 336P, minus sum of codes 337P, 338P.

Income from other sources:-

340P Household = Code 050P.
341P Head = Code 090P.
342P Wife = Code 110P.
343P Others = Code 340P, minus sum of codes 341P, 342P.

Normal gross income:-

344P Household = Sum of codes 051P, 277P.
345P Head = Sum of codes 091P, 277P.
346P Wife = Code 111P.
347P Others = Code 344P, minus sum of codes 345P, 346P.

348P) NOT USED.
349P)

350P Social Security benefits:-
Sum of codes 332P and 336P.

351P Head and wife both unemployed:-
If code 081P and code 101P are coded, the product code has a value of 1.

Current gross income:-

352P Household = Sum of codes 053P, 277P.
353P Head = Sum of codes 093P, 277P.
354P Wife = Code 113P.
355P Others = Code 352P, minus sum of codes 353P, 354P.

356P Age of head:-
Code 094P.

Code	Description
357P	Age of wife:- Code 114P.
358P	Sex of head.- The product code has a value of 1 if code 098P is coded, 2 if code 098P is not coded.
359P	Not used in 1985
<u>Betting, payments less winnings (negative answers acceptable):-</u>	
360P	Football pools - Code 055P.
361P	Bookmaker - Code 056P.
362P	Lotteries - Code 057P.
363P	Other betting - Code 058P.
364P	Pensioner Income (DE definition) - Sum of codes 060P, 061P, 062P.
365P	Pensioner Household.- If code 364P, divided by code 344P, multiplied by 1,000, is greater than 749, the product code has a value of 1.
366P	Non-pensioner Household:- If code 365P is not coded, the product code has a value of 1.
<u>Expenditure:-</u>	
367P	Housing:- Sum of codes 116P, 281P to 286P, item codes 2240, 2310 to 2360, 2390, 7850 if suffixed A to L.
368P	Fuel, light and power (negative answers acceptable):- Sum of codes 117P, 017, 027, 170, 175, 221, 222, item codes 2250, 2260, 2400 to 2610 if suffixed A to L, minus sum of codes 173 and 178.
369P	Food.- Sum of codes 118P, 260; item codes 1010 to 1990, 8400 to 8570 if suffixed A to L.
370P	Alcoholic Drink:- Sum of codes 119P, item codes 2800 to 2990 if suffixed A to L.
371P	Tobacco:- Sum of codes 120P; item codes 2110 to 2130 if suffixed A to L.

Code	Description
372P	Clothing and Footwear:- Sum of codes 121P; item codes 3010 to 3490 if suffixed A to L.
373P	Durable Household Goods:- Sum of codes 122P, 168; item codes 4010 to 4200, 4220-4360, 6010, 6030, 6040, 7600, 7840, 7860, if suffixed A to L.
374P	Other goods:- Sum of codes 123P, 274; item codes 6110 to 6480, 7210 to 7490, if suffixed A to L.
375P	Transport and Vehicles (negative answers acceptable):- Sum of codes 124P, 158, 186 to 189, 191, 219, 244, 245, 247, 255, 270; item codes 5010 to 5030, 5050-5590 if suffixed A to L, minus code 179.
376P	Services (negative answers acceptable):- Sum of codes 125P, 160, 162, 164, 166, 180, 181, 185, 195, 254, 271, 273, 275, 278 to 280; item codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L, minus code 194.
377P	Miscellaneous:- Sum of codes 126P; item codes 7500, 8010, if suffixed A to L.
378P	Total Expenditure:- Sum of codes 367P to 377P.
379P	Other payments (negative answers acceptable):- Sum of codes 128P, 131 to 135, 196, 197, 198, 199, 201 to 206, 208, 213, 229, 276; item codes 2160 to 2230, 8030, if suffixed A to L.
380P	Total Expenditure, plus imputed values:- Sum of codes 163P, 289P, 378P, minus code 045P.
381P	Expenditure on permanent second dwelling:- Code 129P.
382P)	
383P)	NOT USED.
384P)	
385P	Gross Household income, based on "normal" earnings:- Sum of codes 007P, 013P, 015P, 027P, 028P, 033P, 034P, 037P, 047P to 050P, 277P.
386P	Gross Household income, based on "actual" earnings, if absent less than 14 weeks, or Social Security benefits if absent 14 weeks or more:- Sum of codes 005P, 015P, 031P, 037P, 047P to 050P, 277P.

Code	Description
387P	Gross Household income, based on "actual" earnings.- Sum of codes 003P, 013P, 015P, 027P, 028P, 033P, 034P, 037P, 047P to 050P, 173P, 277P.
388P	Current NI employees contribution.- Code 075P.
389P	Gross household income, less tax and NI conts (negative answers acceptable).- Sum of codes 177P, 277P.
390P	Current PAYE tax deduction - Code 077P.
391P	Current PAYE tax refund.- Code 078P.
392P	Income tax, payments less refunds, (negative answers acceptable) - Code 079P.
393P	Income tax, payments less refunds, 13 week rule applied (negative answer acceptable).- Code 067P.
394P	Current gross income based on normal wage/salary of employees at work:- Sum of codes 189P, 277P.
395P	Normal gross income, excluding tax and NI contributions, but including value of self supply goods and income in kind.- Sum of 163P, 289P, 344P, minus sum of codes 029P, 388P, 392P.
396P	Age of head of household (multiplied by 100 for use in expenditure tables):- Code 356P multiplied by 100.
397P	Household has rented TV, paid for by regular payments to rental company.- If code A 106 has a value of 1, 3, 4, 5, 6, or 7 the product code has a value of 1.
398P	NOT USED.
399P	Normal gross income, excluding tax and NI contributions, but including income in kind (not self supply goods) - Sum of codes 163P, 289P, 344P, minus sum of codes 029P, 045P, 388P, 392P.

Code

Description

CSO Household Product Codes

Rent/rates (including non-separable service element)

400P	Tenure type 1 = Code 257P, multiplied by code 201P, divided by code 202P.
401P	Tenure type 2 = Code 258P, multiplied by code 201P, divided by code 202P.
402P	Tenure type 3 = Code 259P, multiplied by code 201P, divided by code 202P.
403P)	Not
) used	
404P)	since
) 1983	
405P)	

Rates, if separate:-

406P	Tenure type 1 = sum of codes 031, 205P, multiplied by code 201P, divided by code 202P.
407P	Tenure type 2 = sum of codes 032, 206P, multiplied by code 201P, divided by code 202P.
408P	Tenure type 3 = sum of codes 033, 207P, multiplied by code 201P, divided by code 202P.
409P	Tenure type 6 = sum of codes 036, 210P, multiplied by code 201P, divided by code 202P.

Water charges:-

410P	Tenure type 1 = Code 051, multiplied by code 201P, divided by code 202P.
411P	Tenure type 2 = Code 052, multiplied by code 201P, divided by code 202P.
412P	Tenure type 3 = Code 053, multiplied by code 201P, divided by code 202P.
413P	Tenure type 6 = Code 056, multiplied by code 201P, divided by code 202P.
414P	Net rateable value, tenure types 4 and 5:- Sum of codes 239P and 240P, multiplied by sum of codes 217P, 218P, 219P, multiplied by code 201P, divided by code 202P, divided by 1,000.
415P	Ground rent, tenure types 4 and 5:- Sum of codes 064 and 065, multiplied by code 201P, divided by code 202P.

Code	Description
416P	Rates paid, tenure types 4 and 5:- Sum of codes 034, 035, 208P, 209P, multiplied by code 201P, divided by code 202P.
417P	Water charges, tenure types 4 and 5.- Sum of codes 054 and 055, multiplied by code 201P, divided by code 202P.
418P	Theoretical loss from sub-letting:- Sum of codes 257P to 259P, 267P, 268P, 031 to 036, 041 to 047, 051 to 056, 061 to 066, minus sum of codes 400P to 417P.
419P) 420P)	NOT USED.
421P	Costs of sub-let portion of dwelling:- Code 202P, minus code 201P, divided by code 202P, multiplied by sum of codes 257P to 259P, 267P, 268P, 031 to 036, 041 to 047, 051 to 056, 061 to 066.
422P	NOT USED.
423P	NOT USED FROM 1984.
424P	Income from owner-occupation:- Sum of codes 267P and 268P.
	<u>Main source of household income</u>
425P	Wages/salaries:- Sum of codes 300P and 312P, if greater than any of the other sources of income.
426P	Self-employment income - Code 320P, if greater than any of the other sources of income.
427P	Investment income:- Code 324P, if greater than any of the other sources of income.
428P	Annuities, pensions - Code 328P if greater than any of the other sources of income.
429P	Social Security benefits.- Sum of codes 332P and 336P, if greater than any of the other sources of income.
430P	Imputed income.- Code 277P, if greater than any of the other sources of income.

Code	Description
431P	Income from other sources:- code 340P, if greater than any of the other sources of income.
<u>Credit Expenditure</u>	
432P	Housing:- Sum of codes 2240, 2310 to 2360, 2390, 7850, if suffixed A to L.
433P	Fuel, light and power:- Sum of codes 2250, 2260, 2400 to 2610, if suffixed A to L.
434P	Food:- Sum of codes 1010 to 1990, 8400 to 8570, if suffixed A to L.
435P	Alcoholic Drink:- Sum of codes 2800 to 2990; if suffixed A to L.
436P	Tobacco:- Sum of codes 2110 to 2130, if suffixed A to L.
437P	Clothing and footwear:- Sum of codes 3010, 3030 to 3210, 3230 to 3490, if suffixed A to L.
438P	Durable household goods:- Sum of codes 4010 to 4200, 4220 to 4360, 6010, 6030, 6040, 7600, 7840, 7860, if suffixed A to L.
439P	Other goods:- Sum of codes 6110 to 6480, 7210 to 7490, if suffixed A to L.
440P	Transport and vehicles:- Sum of codes 5010 to 5030, 5050-5590 if suffixed A to L.
441P	Services:- Sum of codes 2270 to 2290, 7510 to 7710, 7730, 7750, 7810, 7820, 7880 to 7930, 7960 to 7990, 8020, if suffixed A to L.
442P	Miscellaneous:- Sum of codes 7500, 8010, if suffixed A to L.
443P	Credit component of total expenditure:- Sum of codes 432P to 442P.
444P	Other credit expenditure:- Sum of codes 2160 to 2230, 8030, if suffixed A to L.
445P)	
446P)	NOT USED.
447P)	
448P	Percentage ratio of gross income to disposable income (EI = 10%):- Code 344P divided by code 389P, multiplied by 1,000.

Code	Description
449P	Percentage ratio of total expenditure to disposal income (E1 = 10%) - a. Households with self-employed heads:- If code 161P for person 1 has value of 2, code 378P divided by code 389P, multiplied by 1000.
450P	b. Households with employee heads.- If code 161P for person 1 has a value of 1, 3 or 4, code 378P divided by code 389P, multiplied by 1000.
451P	c. Households with retired/unoccupied heads:- If code 161P for person 1 has a value of 5, 6 or 7, code 378P divided by code 389P multiplied by 1000.
452P	Percentage of pensioners income in household:- Code 162P multiplied by 100, divided by code 344P.
<u>Components of Net Household Income</u>	
453P	Imputed income from Schedule B:- Code 163P.
454P	Income from Schedule B Code 164P.
455P	Net income, excluding imputed income from Schedule B - Sum of codes 424P, 454P, 209, 210, 259, 263.
456P	Net Household income:- Sum of codes 453P and 455P.
<u>Components of Original Income</u>	
457P	Income from Schedule B:- Code 166P.
458P	NOT USED.
459P	Original income:- Sum of codes 424P, 453P 457P, 209.
460P	Original income including cash benefits.- Sum of codes 167P, 459P.
461P)	
462P)	Not
463P)	used
464P)	since
465P)	1983
466P)	
467P)	
468P	
469P	

Code	Description
470P)	Consumers expenditure:-
471P)	Sum of codes 071P, 378P, 196, 199, 206. (Each product code contains half the total expenditure).
<u>Social Grade of Head of Household (see Coding from 21):-</u>	
472P	NOT USED SINCE 1983.
473P	NOT USED SINCE 1983.
474P	NOT USED SINCE 1983.
475P	NOT USED SINCE 1983.
476P	NOT USED
477P	Code for number of workers (the value is one more than the number of workers):- Code 021P, plus 1.
478P	NOT USED.
479P	Number of Tax Units in household (£1 = 1 unit):- Code 190P.
<u>Ownership of certain durable goods.</u>	
480P	Colour TV licence:- If the value of code 181 is greater than 41 (pence per week) the product code is formed with values derived from code A 098 to indicate the Standard Region.
481P	Telephone:- If code A 102 is coded, the product code has a value of 1.
482P	Television:- If code A 105 is coded, the product code has a value of 2.
483P	Washing machine:- If code A 108 is coded, the product code has a value of 4.
484P	Refrigerator and/or freezer:- If any of codes A 164, A 165, A 166 is coded the product code has a value of 8.
485P	Central Heating:- If any of codes A 150 to A 154 is coded, the product code has a value of 16.

Code	Description
486P	Car:- If Code A124 is coded, the product code has a value of 32
487P	Combination of durables owned (see Coding Frame 24):- Sum of codes 481P to 486P
488P	Total expenditure, including life assurance, superannuation, sickness and accident insurance etc.- Sum of codes 470P and 471P
489P	Households with 2 cars:- If code A124 has a value of 2, the product code has a value of 32
490P	Households with 3 or more cars:- If code A124 has a value greater than 2, the product code has a value of 32
491P	Normal gross income (2 week rule):- Sum of codes 176P, 277P
492P	"Index" household:- The product code has a value of 1 if code 366P is coded and if code 345P has a value of less than - £350 (1st quarter) £350 (2nd quarter) (3rd quarter) (4th quarter)
493P	"Wealthy" Household:- If codes 365P and 492P are not coded, the product code has a value of 1.
<u>Supplementary Benefit Households</u>	
494P	Current SB received by head or wife of head of household - Code 160P.
495P	Households with partial rent rebates and current SB received by head or wife:- If code 494P is coded, code 230.
496P	Households with full rent rebates and current SB received by head or wife:- If code 494P is coded, code 174.
497P	Households with partial rent rebates but no current SB received by head or wife:- If code 494P is not coded, code 230.

Code	Description
<u>Calculated water rates:-</u>	
498P	Tenure type 1: If code A 120 = 1, code 231 multiplied by code 071, plus code 234.
499P	Tenure type 2: If code A 120 = 2, code 231 multiplied by code 072, plus code 234.
500P	Tenure type 3: If code A 120 = 3, code 231 multiplied by code 073, plus code 234.
501P	Tenure type 4: If code A 120 = 4, code 231 multiplied by code 074, plus code 234.
502P	Tenure type 5: If code A 120 = 5, code 231 multiplied by code 075, plus code 234.
503P	Tenure type 6: If code A 120 = 6, code 231 multiplied by code 076, plus code 234.
504P	Household has a gas supply:- If code A 103 has a value of 5 or 7 the product code has a value of 1.
505P	Households with full rent rebates but no current SB received by head or wife:- If code 494P is not coded, code 174.
<u>Household Product Codes - Department of the Environment</u>	
506P	NOT USED SINCE 1983.
507P	NOT USED SINCE 1983.
508P	NOT USED SINCE 1983.
509P	NOT USED SINCE 1983.
510P	NOT USED SINCE 1983.
511P	NOT USED SINCE 1983.
512P	Household comprising children only:- If neither code 019P nor code 024P is coded, the product code has a value of 1.
513P	Age difference of head and wife 25 years or more:- If code 356P minus code 357P or code 357P minus code 356P is greater than 24, the product code has a value of 1.

Code

Description

Interest/Principal mortgages - Last instalment where interest element is known

514P Building Society: if code 151 is coded, code 201.
515P Local Authority: If code 152 is coded, code 202.
516P Bank: If code 153 is coded, code 203.
517P Insurance Co: If code 154 is coded, code 204.
518P Other source. If code 155 is coded, code 205.
519P NOT USED FROM 1984.
520P NOT USED " 1984.
521P NOT USED " 1984.
522P NOT USED " 1984.

Mortgages - Interest/Principal arrangements

523P Last instalment where interest is known.-
If codes 151 to 155 are coded, sum of codes 201 to 205.
524P)
525P)
526P)
527P) Check code for use within DE.
528P)
529P)
530P)

- Net housing costs, including contractors and maintenance charges -

531P Tenure type 1 If code A 120 has a value of 1, code 367P.
532P Tenure type 2 If code A 120 has a value of 2, code 367P.
533P Tenure type 3. If code A 120 has a value of 3, code 367P.
534P Tenure type 4 If code A 120 has a value of 4, code 367P.
535P Tenure type 5. If code A 120 has a value of 5, code 367P.
536P Tenure type 6. If code A 120 has a value of 6, code 367P.
537P to 547P Check codes for use within DE.
548P)
549P) NOT USED.
550P)

Code	Description
<u>Expenditure on house repairs/maintenance by owner occupiers</u>	
Tenure type 4, calculated if A 120 has a value of 4:-	
551P	Payments to contractors: Sum of codes 146P and 224A to 224L, 7850 A-L.
552P	Paint and distemper: Sum of codes 147P and 231A to 231L.
553P	Wallpaper: Sum of codes 148P and 232A to 232L.
554P	Timber and Hardboard: Sum of codes 149P and 233A to 233L.
555P	Other materials: Sum of codes 150P and 234A to 234L.
556P	Fittings: Sum of codes 151P and 235A to 235L.
557P	Tools: Sum of codes 152P and 236A to 236L.
558P	Composite purchases: Sum of codes 153P and 239A to 239L.
Tenure type 5, calculated if A 120 has a value of 5:-	
559P	Payments to contractors: Sum of codes 146P and 224A to 224L, 7850 A-L.
560P	Paint and distemper: Sum of codes 147P and 231A to 231L.
561P	Wallpaper: Sum of codes 148P and 232A to 232L.
562P	Timber and Hardboard: Sum of codes 149P and 233A to 233L.
563P	Other materials: Sum of codes 150P and 234A to 234L.
564P	Fittings: Sum of codes 151P and 235A to 235L.
565P	Tools: Sum of codes 152P and 236A to 236L.
566P	Composite purchases: Sum of codes 153P and 239A to 239L.
<u>Calculated sewerage rates:-</u>	
567P	Tenure type 1: If code A 120 = 1, code 232 multiplied by code 071, plus code 235.
568P	Tenure type 2: If code A 120 = 2, code 232 multiplied by code 072, plus code 235.
569P	Tenure type 3: If code A 120 = 3, code 232 multiplied by code 073, plus code 235.

Code	Description
570P	Tenure type 4 If code A 120 = 4, code 232 multiplied by code 074, plus code 235.
571P	Tenure type 5. If code A 120 = 5, code 232 multiplied by code 075, plus code 235.
572P	Tenure type 6 If code A 120 = 6, code 232 multiplied by code 076, plus code 235.

Calculated environmental rates.-

573P	Tenure type 1: If code A 120 = 1, code 233 multiplied by code 071.
574P	Tenure type 2: If code A 120 = 2, code 233 multiplied by code 072.
575P	Tenure type 3. If code A 120 = 3, code 233 multiplied by code 073.
576P	Tenure type 4: If code A 120 = 4, code 233 multiplied by code 074.
577P	Tenure type 5 If code A 120 = 5, code 233 multiplied by code 075.
578P	Tenure type 6. If code A 120 = 6, code 233 multiplied by code 076.

Calculated domestic, sewerage and environmental rates, less rates rebate:-

579P	Tenure type 1 = codes 221P, 567P, 573P.
580P	Tenure type 2 = codes 222P, 568P, 574P.
581P	Tenure type 3 = codes 223P, 569P, 575P.
582P	Tenure type 4 = codes 224P, 570P, 576P.
583P	Tenure type 5 = codes 225P, 571P, 577P.
584P	Tenure type 6 = codes 226P, 572P, 578P.

Calculated Gross Rent -

585P	Tenure type 1 = Code 271P, minus sum of codes 498P, 567P, 573P.
586P	Tenure type 2 = Code 272P, minus sum of codes 499P, 568P, 574P.
587P	Tenure type 3 = Code 273P, minus sum of codes 500P, 569P, 575P.
588P)
589P)
590P) Check codes for use within DE.
591P)
592P)

LIST OF EXPENDITURE CODES FROM DIARY RECORD-BOOKS

Notes. 1 These codes are used for items of expenditure from the diary record-books. They are recorded on tape as 4-character codes, the fourth character indicating the week/day number.

2 These codes are also used for credit/HP acquisitions. These entries also are recorded on tape as 4-character codes, the fourth character being a suffix letter indicating the type of transaction. The suffix letters used are as follows:-

A	=	HP	Instalment
B	=	HP	down payment
C	=	Goods	acquired under budget account scheme.
E	=	"	" through other shop club.
F	=	"	" " mail order agent.
G	=	"	" " other mail order organisation.
J	=	"	" " check trader.
K	=	"	" " other credit arrangements (except credit cards)
L	=	"	" " credit cards.

3 All values are reduced to weekly equivalents during initial computer processing and are recorded on tape in tenths of pence.

Code	Description
<u>FOOD</u>	
101	Bread, milk loaves, rolls
102	Flour, plain and self-raising
103	Biscuits, shortbread, wafers, etc
104	Cakes, currant bread, fruit pies, pastries, scones, etc
105	Composite purchases of bread, flour, biscuits and cakes
108	Dry cereals
111	Beef and veal, including minced meat
112	Mutton and lamb
113	Pork
114	Bacon and ham, uncooked
115	Offal
121	Cooked (including canned) ham
122	Sausages (uncooked), sausage meat
123	Cooked meats and meat products, canned and bottled meat
127	Poultry, rabbit, game, venison - cooked, uncooked, frozen, bottled
129	Meat not otherwise defined
130	Protein meat substitute
131	Fish - fresh
132	Fish - canned
133	Fish - frozen
138	Fish and chips
140	Eggs, fresh and dried
141	Butter
142	Margarine
143	Fresh milk
144	Fresh cream, skimmed milk, canned and dried milk and cream, yoghurt, other milk products, baby milk foods
146	Cheese, including processed
149	Lard, cooking and other oils and fats, soya margarine
150	Canned/bottled baby foods (not milk)
151	Vegetables - fresh
154	Vegetables - canned, bottled, dried
155	Vegetables - frozen

Code	Description
<u>FOOD (contd)</u>	
156	Potato products and processed potatoes
158	Potatoes (raw)
<p><u>Note</u> If specific fruit and vegetables are not distinguished as between fresh, canned, bottled, etc, they are treated as fresh</p>	
160	Fresh fruit -
163	Fruit - canned, bottled, frozen, dried, juices
165	Tomatoes - fresh, canned, bottled
171	Tea
172	Coffee, coffee essence
173	Proprietary food drinks and non-proprietary food drinks, other than baby milk foods, soya milk
181	Sugar
182	Syrup, lemon curd, honey, jam, marmalade
183	Ice cream
184	Soft drinks (squashes, cordials, crystals)
185	Sweets and chocolates
191	Packaged and canned foods
192	Flavourings, colourings, additives
195	Pickles, sauces, chutneys
196	'Take-away' food (cold) consumed at home, cold sandwiches, cold rolls with filling, cold meat pies, cold sweet pies
197	'Take-away' food (hot) consumed at home, toasted sandwiches, hot rolls with filling, hot meat pies, hot sweet pies
199	Food undefined

Code	Description
<u>TOBACCO</u>	
211	Cigarettes, cigarette tobacco and papers
212	Pipe tobacco
213	Cigars, snuff
<u>SPACE HEATING (STRUCTURAL)</u>	
216	Space heating, (structural)
<u>HOUSING</u>	
221	House purchase including deposits
222	Caravan purchase including deposits
223	Structural additions and enlargements
224	Repairs, decorations and replacements
225	Second dwelling - electricity a/c
226	Second dwelling - gas a/c
227	Second dwelling - telephone a/c
228	Second dwelling - rent, rates, etc
229	Second dwelling - TV licence
<u>Purchase of materials and tools for house maintenance</u>	
231	Paint and distemper
232	Wallpaper
233	Timber and hardboard
234	Other materials
235	Fittings
236	Tools
239	Composite or undefined of item codes 231-236
<u>FUEL, LIGHT AND POWER</u>	
240	House coal, anthracite and boiler fuel (excluding premium smokeless fuels)
242	Coke and premium smokeless fuels
253	Paraffin
254	Gas, slot meter payments
255	Electricity, slot meter payments
259	Other fuel and light and fuel <u>undefined</u>
261	Fuel oil other than for central heating

Code	Description
<u>ALCOHOLIC DRINK</u>	
<u>a) Alcoholic drink brought home</u>	
280	Beer, stout, ale, shandy
281	Cider, perry
283	Fortified Wines
284	Non-fortified wines
285	Wine, unspecified
286	Spirits, liqueurs
289	Alcoholic drink incompletely described
<u>b) Alcoholic drink bought and consumed away from home</u>	
290	Beer, stout, ale, shandy
291	Cider, perry
293	Fortified wines
294	Non-fortified wines
295	Wine, unspecified
296	Spirits, liqueurs
299	Alcoholic drink incompletely described, eg "rounds of drink"
<u>CLOTHING AND FOOTWEAR</u>	
301	Men's outerwear (including shirts)
303	Men's underwear
304	Men's hosiery
311	Women's outerwear
313	Women's underwear
314	Women's hosiery
321	Boys' outerwear (including shirts)
323	Boys' underwear
324	Boys' hosiery
325	Girls' outerwear
327	Girls' underwear
328	Girls' hosiery
329	Infants' clothing
330	Clothing materials
331	Men's and boys' headgear
332	Women's and girls' headgear and headgear not fully described; haberdashery
334	Other clothing charges
341	Men's footwear
342	Women's footwear
343	Children's including infant's footwear
349	Footwear undefined

Code	Description
<u>DURABLE HOUSEHOLD GOODS</u>	
401	New and second-hand furniture
404	Floor coverings including making up charges
405	New and second-hand household textiles, including making up charges
407	New and second-hand mattresses
408	Purchase of TV games
409	Radios, televisions, gramophones, tape recorders (New and second hand)
410	Purchase of home computers
411	New and second-hand gas cookers
412	Gas and electric durables not coded elsewhere
413	New and second-hand electric cookers
414	Telephones and answering machines
417	New and second-hand electric washing/drying machines
419	New and second-hand electric fridges, freezers
420	Purchase of video recorders
421	Not used in 1985
422	Spare parts for radios, televisions, gramophones, tape recorders, videos
423	Spare parts for gas and electric durables
431	China and glassware, pottery
434	Major household appliances excluding parts other than fittings not powered by gas/electricity
436	household items not coded elsewhere
<u>VEHICLES</u>	
501	New cars) Hire-purchase,
502	Second-hand cars) credit transactions
503	New and second-hand motor cycles) only.
504	not used in 1985
505	Other new and second-hand vehicles
508	Repairs and other service charges to vehicles other than cars and motor cycles
509	Car accessories, parts and replacements new and second-hand
510	Motor-cycle accessories, parts and replacements new and second-hand
511	Other vehicle accessories, parts and replacements, new and second-hand
541	Petrol and diesel oil
542	Other motor oils
546	AA and RAC subscriptions
548	Car and motor cycle repairs and servicing
549	Other car and motor cycle costs

Code	Description
<u>TRAVEL</u>	
551	Rail or tube fares other than season tickets
552	Bus, coach fares other than season tickets
553	All air travel
554	Water travel other than season tickets
555	Taxis, including hired cars with driver
556	Hire of self-drive cars
557	Monetary contribution towards cost of travel in friends' etc vehicle
559	Other travel and transport and transport undefined
<u>OTHER GOODS</u>	
601	New and second-hand musical instruments and parts
603	New and second-hand records audio and home computer cassettes
604	Purchase and rental of video cassettes, discs and accessories
611	Non NHS spectacles, but not sunglasses
612	NHS spectacles
621	Drugs and medicines (other than NHS) including items undefined as to NHS or other
622	Cosmetics
623	Toilet paper
624	Other toilet requisites
625	Charges for items bought on NHS prescriptions and payments for NHS appliances
631	Toys
632	Photographic goods, optical goods
634	Hobbies
641	Sports goods (not clothes)
642	Leather and travel goods, umbrellas, walking sticks
643	Jewellery, watches and clocks, silverware
644	Decorative fancy goods, smokers requisites
648	Stationery
721	Books (not library subscriptions) including school and text books
722	Newspapers
723	Magazines/Periodicals
731	Food for animals and pets, not normally for human consumption
732	Other expenditure on animals and pets
733	Seeds, plants, flowers
734	Plant fertilizers
741	Matches
745	Toilet soap
746	Other soap and soap products
749	Other cleaning materials
750	Miscellaneous expenditure on goods not assigned to any other code

Code	Description
<u>SERVICES</u>	
751	Postage, including parcel post and poundage
752	Telephone (not telephone account), telegrams
756	Hotels and boarding houses
757	Holidays in Channel Islands and Isle of Man and abroad
759	Holiday expenses not allocated elsewhere
760	Cable TV line rental, wired TV and radio, piped TV
761	Cinemas
762	Dances (admission)
763	Theatres, concerts, circus
764	Participant sports and pastimes - subscriptions and admissions
766	Football matches - (admission)
767	Other spectator sports (admission)
768	Radio/TV rental - slot meter payments, TV game console
769	Miscellaneous entertainment not assignable to specific item codes
770	Stamp duties to Central Authorities
771	Domestic services
773	NHS payments - dentists
775	Private medical, dental, optician, etc fees, Excluding non-NHS spectacles Including items undefined as to NHS or other
781	Sweeps and window cleaners
782	Repairs to footwear and materials for home repairs
784	Repairs and maintenance to tape recorders, radio, television and musical instruments, video, TV game, home computers
785	Repairs and maintenance to central heating appliances
786	Repairs and maintenance to other gas and electric appliances
788	Repairs to personal goods, excluding medical repairs and other repairs
789	Interest on Credit Card (used with suffix L only)
790	Cleaning and dyeing
791	Laundrette and hire of washing machine, laundry
793	Hairdressing, manicure, beauty treatment
796	Subscriptions to Trade Union, Professional Associations, etc
797	Other subscriptions
798	Charitable gifts
799	Miscellaneous expenditure on services not assignable to any other code
<u>MISCELLANEOUS</u>	
801	Children's pocket money, the expenditure of which cannot be assigned to a particular code
802	Cash gifts (not donations) and tips not allocated elsewhere
803	Savings

Code	Description
<u>BETTING</u>	
811	Stakes - football pools
812	Stakes - bookmaker, betting shop, tote
813	Stakes - lotteries
814	Stakes - other betting
821	Winnings - football pools
822	Winnings - bookmaker, betting shop, tote
823	Winnings - lotteries
824	Winnings - other betting
<u>MEALS OUT</u>	
<u>a) Workplace meals</u>	
840	Fish and chips; other meals out; soft drinks; ice cream; sweets and chocolates; specified other foods
841	Sandwiches, rolls with filling, cakes, currant bread, fruit pies, pastries, scones, etc
842	Non-alcoholic drinks other than soft drinks and fruit juices
<u>b) All other meals out eaten on premises</u>	
843	Fish and chips; other meals out
844	Sandwiches, cakes etc
845	Non-alcoholic drinks
846	Soft drinks excluding fruit juices; ice cream; sweets and chocolates; specified other foods
<u>c) All other meals out eaten off premises (not at home)</u>	
847	Fish and chips
848	Meals out including salad
849	Cakes etc
850	Non-alcoholic drinks
851	Soft drinks exc fruit juices
852	Ice cream
853	Sweets and chocolates
854	Specified other foods
855	Hot meals eg. Breakfast, lunch, dinner, supper, snack etc
856	Toasted sandwiches, hot rolls with filling, hot meat and sweet pies etc
857	Cold food eg. cold sandwiches, cold rolls with filling, cold meat and sweet pies etc

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Coding Frame	Description
1	Type of Administrative Area
2	Household Composition (DE)
3	Occupation
4	Industry
5	Type of Household
6/7	Ranges of Gross Income/Disposable Income/Total Expenditure
8	Type of Tenure (DE)
9	Type of investment
10	Not used
11	Week Numbers
12	Households with married women
13	Type of fuel used for room heating
14	Not used
15	Household Composition (CSU)
16	Not used
17	Not used --
18	Standard Regions (code A098)
19	Age of Head of Household/Wife of head of Household/Chief Economic Supporter
20	Relationship to Head of Household
21	Type of Interest
22	Ranges of Personal Gross Earnings
23	Economic Position
24	Combination of durable goods available
25	Type of accommodation occupied by the household
26	Education Grant, Scholarship etc - Source, Level, Establishment
27	Head of Household out of a job
28	Amount of SAYE, National Savings Certificates or Premium Bonds held
29	Imputation of Income
30	Items included in rent

Family Expenditure Survey 1985

Coding frame 1 Type of Administrative Area
(Information Code A097)

Value	Type of Administrative Area	Remarks
1	Greater London	
2	Metropolitan Districts and Central Clydeside Conurbation	
	<u>Non-Metropolitan Districts:</u>	
3	Areas with population density of 3.2 or more persons per acre. (7.9 or more persons per hectare)	
4	Areas with population density of 0.9 but less than 3.2 persons per acre. (2.2 but less than 7.9 persons per hectare)	
5	Areas with population density of less than 0.9 persons per acre (2.2 persons per hectare)	

FAMILY EXPENDITURE SURVEY 1985

CODING FRAME 2

HOUSEHOLD COMPOSITION (Information Codes A056 and A057)

Value	Composition of Household	Remarks
1	One man	For code A057, children are defined as unmarried persons under 18. Men, women and adults are married persons irrespective of age, or unmarried persons aged 18 or over.
2	One Woman	
3	One man, 1 child	
4	One woman, 1 child	
5	One man, 2 or more children	
6	One woman, 2 or more children	
7	One man and 1 woman	
8	Two men or 2 women	
9	One man, 1 woman and 1 child	
10	Two men or 2 women, and 1 child	For code A056, children are persons aged under 16. Men, women and adults are persons aged 16 or over.
11	One man, 1 woman, 2 children	
12	Two men or 2 women, and 2 children	
13	One man, one woman, 3 children	
14	Two men or 2 women, and 3 children	
15	Two adults, 4 children	
16	Two adults, 5 children	
17	Two adults, 6 children	
18	Two adults, 7 or more children	
19	Three adults	
20	Three adults, 1 child	
21	Three adults, 2 children	
22	Three adults, 3 children	
23	Three adults, 4 or more children	
24	Four adults	
25	Four adults, 1 child	
26	Four adults, 2 or more children	
27	Five adults	
28	Five adults, 1 or more children	
29	Six or more adults	
30	All other households with children*	

* For code A057, this group includes households comprising children only.

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Occupation (Information codes A092, A177 and A210)

Coding Frame 3

Value	Occupation	Remarks
1	Professional and technical workers	
2	Administrative and managerial workers	
3	Teachers	
4	Clerical workers, eg clerks, commercial travellers, agents	
5	Shop assistants	
6	Manual workers - skilled	
7	" " - semi-skilled	
8	" " - unskilled	
9	Members of HM Forces	
10	Retired	
11	Unoccupied	

Note Values 1 to 9 are entered at code A210 on Schedule B and are based on the Social Classes used in OPCS Classification of Occupations. Values 10 and 11 at code A210 are allocated by the computer for persons coded 5 to 7 at code A201 of Schedule B. For codes A092 and A177 values 1 to 9 are allocated by computer only to workers (ie persons coded 1 at code A015). Non workers, including spenders without a recording at code A210, are allocated to values 10 or 11 at codes A092 and A177.

Family Expenditure Survey 1985

Coding Frame 4

Industry (Information codes A093 and A211)

Value	Industry	SIC Class No.
1	Agriculture, forestry, fishing	01-03
2	Extraction, processing and production of coal, coke, mineral oil, natural gas and nuclear fuel	11-15
3	Gas, electricity and other forms of energy; water supply	16-17
4	Metal extraction and manufacture	21-22
5	Extraction of minerals nes; manufacture of non-metallic mineral products	23-24
6	Chemicals and allied industries; production of man-made fibres	25-26
7	Mechanical engineering; manufacture of metal goods nes	31-32
8	Electrical and electronic engineering; office machinery	33-34
9	Manufacture of vehicles, inc parts, and other transport equipment	35-36
10	Instrument engineering	37
11	Food, drink and tobacco manufacture	41-42
12	Textiles	43
13	Leather and leather goods	44
14	Clothing, footwear, household textiles and fur	45
15	Timber, furniture etc	46
16	Paper, printing and publishing	47
17	Processing of rubber and plastic; other manufacturing industries	48-49
18	Construction	50
19	Distributive trades, wholesale and retail	61-65
20	Hotels and catering	66
21	Repair of consumer goods and vehicles	67
22	Rail transport	71
23	Other transport and misc transport services	72-77
24	Postal services and communications	79
25	Insurance, banking, finance, real estate and business services	81-85
26	Justice; Social Security; National defence; National Government nes	91 Part (9111, 9120, 9150, 9190)
27	Police and Fire Service	91 (9130, 9140)
28	Sanitary services; Local Government service nes	91(9112), 92
29	Education; Research and Development	93-94
30	Medical, other health and veterinary services; Other services provided to the general public	95-96
31	Recreational and cultural services	97
32	Personal and domestic services	98-99
33	Diplomatic representation and international organisations	00

Note At code A211 an industry coding is allocated to some non workers.
At codes A093 an industry coding is only allocated to workers (ie persons coded 1 at code A015).

Family Expenditure Survey 1985

Coding Frame 5

TYPE OF HOUSEHOLD
(Information Code A069)

Value	
1	Pensioner Household (DE definition - see below)
2	"Index" household - (non-pensioner household, where income of Head of household is less than £*)
3	"Wealthy" Household (non-pensioner household, where income of Head of household is £* or more)

Pensioner households are those in which the following sources of income amount to at least three-quarters of the total household income (code 344P):-

- a) NI Disablement/war disability pensions received by men aged 60 or more.
- b) Current supplementary benefit received in conjunction with NI Disablement/war disability pensions by men aged 60 or more who are not in employment or who have been away from work without pay for more than 13 weeks.
- c) NI Retirement pensions or current invalidity Pensions received by men aged 65 or more.
- d) Current unemployment, sickness, industrial injury or supplementary benefit received by men aged 65 or more who are not in employment or who have been away from work without pay for more than 13 weeks.
- e) NI Retirement, Widows, War disability or current invalidity pensions received by women aged 60 or more.
- f) Current unemployment, sickness, industrial injury or supplementary benefit received by women aged 60 or more who are not in employment or who have been away from work without pay for more than 13 weeks.

*£350 per week (1st and 2nd quarters)
~~£300~~ per week (3rd and 4th quarters)
~~£400~~

Family Expenditure Survey 1985

Coding Frames 6/7

Ranges of Gross Income of Household (Information code A059)

Ranges of Gross Income of Head (Information code A060)

Ranges of Gross Income of Chief Economic supporter (Information code A175)

Ranges of total expenditure (Information code A067)

Ranges of Disposable Income (Gross household income, less tax and NI Conts. Information code A107)

Range No.	From £'s per week	To £'s per week
1	0.000	39.999
2	40.000	44.999
3	45.000	49.999
4	50.000	54.999
5	55.000	59.999
6	60.000	64.999
7	65.000	69.999
8	70.000	79.999
9	80.000	89.999
10	90.000	99.999
11	100.000	109.999
12	110.000	119.999
13	120.000	124.999
14	125.000	139.999
15	140.000	149.999
16	150.000	159.999
17	160.000	174.999
18	175.000	179.999
19	180.000	199.999
20	200.000	224.999
21	225.000	249.999
22	250.000	274.999
23	275.000	299.999
24	300.000	324.999
25	325.000	349.999
26	350.000	374.999
27	375.000	399.999
28	400.000	449.999
29	450.000	499.999
30	500.000	Infinity

Family Expenditure Survey 1985

Coding Frame 8

TYPE OF TENURE (Information Code A120)

Value	Type of Dwelling	Remarks
1	Rented from a Council or New Town Corporation (including Scottish Housing Associations)	
2	Other rented dwellings, unfurnished	
3	Other rented dwellings, furnished	
4	Owner occupied dwellings on which mortgage payments are being made	
5	Owner occupied dwellings - purchase completed	
6	Rent-free dwellings	

Family Expenditure Survey 1985

Coding Frame 9

Type of investment

(Information Code A218)

Value	Description
1	Index Linked National Certificate (ILNSC)
2	Other National Savings Certificates (ONSC)
3	Save As You Earn - National Savings (SAYE-NS)
4	Save As You Earn - Building Society (SAYE-BS)
5	Premium Bonds (PB)
6	National Savings Income Bonds (NSIB)
7	National Savings Deposit Bonds (NSDB)
8	ILNSC + ONSC
9	ILNSC + PB
10	ILNSC + NSIB
11	ONSC + PB
12	ONSC + NSIB
13	PB + NSIB
14	ILNSC + ONSC + PB
15	ILNSC + ONSC + NSIB
16	ILNSC + PB + NSIB
17	ONSC + PB + NSIB
18	ILNSC + ONSC + PB + NSIB
19	ILNSC + SAY NS + PB
20	ILNSC + ONSC + SAYE-NS + PB
21	ILNSC + SAYE-NS
22	ONSC + SAYE-NS
23	SAYE-NS + PB
24	SAYE-BS + PB
25	ILNSC + ONSC + PB + NSDB
26	ONSC + SAYE-BS
27	SAYE-NS + NSIB
28	ONSC + SAYE-NS + PB
29	SAYE-NS + SAYE-BS + PB
30	ONSC + SAYE-NS + SAYE-BS + PB

continued on page 83A

Value	Description
31	ILNSC + ONSC + SAYE-NS + SAYE-BS+PB
32	ONSC + SAYE-BS+PB
33	ONSC + PB + NSDB
34	ILNSC + SAYE-BS + PB
35	PB + NSDB
36	ILNSC + ONSC + SAYE-NS
37	SAYE-NS + SAYE-BS
38	ILNSC + SAYE-NS + SAYE-BS + PB
39	ILNSC + ONSC + NSDB
40	ILNSC + ONSC + SAYE-BS + PB
41	ILNSC + ONSC + SAYE-BS
42	SAYE-NS + PB + NSDB
43	ILNSC + SAYE-NS
44	ILNSC + ONSC + SAYE-BS PB + NSDB
45	ILNSC + SAYE-NS+SAYE-BS

Family Expenditure Survey 1985

CODING FRAME 11

WEEK NUMBERS (Allocated according to the date on which households commenced record-keeping)

Week No.	STARTING DATES (All dates inclusive)	Week No.	STARTING DATES (All dates inclusive)
01	January, 1 to 7	25	July, 1 to 7
02	" 8 to 15	26	" 8 to 15
03	" 16 to 23	27	" 16 to 23
04	" 24 to 31	28	" 24 to 31
05	February, 1 to 7	29	August, 1 to 7
06	" 8 to 14	30	" 8 to 15
07	" 15 to 21	31	" 16 to 23
08	" 22 to end	32	" 24 to 31
09	March, 1 to 7	33	September, 1 to 7
10	" 8 to 15	34	" 8 to 15
11	" 16 to 23	35	" 16 to 23
12	" 24 to 31	36	" 24 to 30
13	April, 1 to 7	37	October, 1 to 7
14	" 8 to 15	38	" 8 to 15
15	" 16 to 23	39	" 16 to 23
16	" 24 to 30	40	" 24 to 31
17	May, 1 to 7	41	November, 1 to 7
18	" 8 to 15	42	" 8 to 15
19	" 16 to 23	43	" 16 to 23
20	" 24 to 31	44	" 24 to 30
21	June, 1 to 7	45	December, 1 to 7
22	" 8 to 15	46	" 8 to 15
23	" 16 to 23	47	" 16 to 23
24	" 24 to 30	48	" 24 to 31
		49	after December 31

Family Expenditure Survey 1985

Coding frame 12

Households with married women
(Information code A052)

Value

- | | |
|----|--|
| 1 | Household with a working married woman with no children |
| 2 | Household with a working married woman with one child |
| 3 | Household with a working married woman with two children |
| 4 | Household with a working married woman with three children |
| 5 | Household with a working married woman with four children |
| 6 | Household with a working married woman with five children |
| 7 | Household with a working married woman with six or more children |
| 8 | Household with a married woman, not working, with no children |
| 9 | Household with a married woman, not working, with one child |
| 10 | Household with a married woman, not working, with two children |
| 11 | Household with a married woman, not working, with three children |
| 12 | Household with a married woman, not working, with four children |
| 13 | Household with a married woman, not working, with five children |
| 14 | Household with a married woman, not working, with six or more children |

Note This code is formed by a computer program which identifies the first working married woman in each household (Code A004, value 2; Code A006, value 1 or 2 and Code A015 value 1). Where a working married woman is identified the number of children aged under 18 within the same family unit (Code A008) is then counted and Code A052 with values 1 to 7 above is formed for the household. Values 8 to 14 are formed for all other households with a married woman, the number of children again being determined by the number of children aged under 18 within the same family unit.

Family Expenditure Survey 1985

Coding Frame 13

TYPE OF FUEL MAINLY USED FOR ROOM HEATING
(Information Code A116)

Value	Types of Fuel
1	Coal
2	Coke
3	Electricity (including oil - filled radiators)
4	Gas/calor gas
5	Oil or paraffin
6	Other
7	Don't know
8	Coal, electricity, gas
9	Electricity, gas
10	Coke, electricity
11	Coal, electricity
12	Coal, coke
13	Coal, gas
14	Coke, gas
15	Coal, other
16	Coal, oil
17	Electricity, oil
18	Gas, oil
19	Coke, other
20	Coke, electricity, gas
21	Coal, electricity, gas, oil
22	Coal, coke, electricity
23	Coal, coke, other
24	Coal, gas, oil
25	Coal, electricity, other
26	Electricity, gas, oil
27	Electricity, other
28	Coal, coke, gas, other
29	Gas, other
30	Oil, other
31	Coal, gas, other, oil
32	Coal, oil, other
33	Coal, gas, other
34	Coal, electricity, oil
35	Gas, electricity, oil, other
36	Coal, Coke and gas
37	Electricity, oil and other
38	Coke and oil
39	Coal, electricity, oil and other
40	Coal, electricity, gas and other
41	Gas, oil and other
42	Coke, electricity and oil

Family Expenditure Survey 1985

Coding Frame 15

CSO Basic Household Composition
(Information Code A058)

CSO Codes	DE Codes (see Coding Frame 2)
1 (Pensioner Households)	1 + 2
2 (Non-Pensioner Households)	1 + 2
3 (All Households)	3 + 4
4 (Pensioner Households)	7 + 8
5 (Non-Pensioner Households)	7 + 8
6 (All Households)	9 + 10
7 " "	11 + 12
8 " "	13 + 14
9 " "	15
10 " "	16
11 " "	17
12 " "	19
13 " "	20
14 " "	21
15 " "	22
16 " "	24
17 " "	5, 6, 18, 23, 25, 26, 27, 28, 29, 30

Note. This Coding Frame is derived from code A056 (ie children are persons aged under 16, adults are persons aged 16 or over).

Family Expenditure Survey 1985

Coding Frame 18

Standard Regions
(Information code A098)

Value	Standard Region
1	Northern
2	Yorks and Humberside
3	North Western
4	East Midlands
5	West Midlands
6	East Anglia
7	Greater London
8	South East (except Greater London)
9	South Western
10	Wales
11	Scotland
12	N Ireland

Family Expenditure Survey, 1985

Age of Head of Household (Information Code A065)

Coding frame 19

Age of Wife of Head (Information Code A066)

Age of Chief Economic Supporter (Information code A176)

Range Nos.	Age	Remarks
3	15 but under 20 years	The range number is obtained by dividing the age by 5 and ignoring any fraction remaining.
4	20 " " 25 "	
5	25 " " 30 "	
6	30 " " 35 "	
7	35 " " 40 "	
8	40 " " 45 "	
9	45 " " 50 "	
10	50 " " 55 "	
11	55 " " 60 "	
12	60 " " 65 "	
13	65 " " 70 "	
14	70 " " 75 "	
15	75 " " 80 "	
16	80 " " 85 "	
17	85 " " 90 "	
18	90 " " 95 "	
19	95 and over	

Family Expenditure Survey 1985

Coding Frame 20

Relationship to Head of Household
(Information Code A002)

Value	Relationship
0*	HOH
1	Wife or husband
2	Son or daughter
3	Son-in-law or daughter-in-law
4	Father or mother
5	Father-in-law or mother-in-law
6	Brother or sister
7	Grandson or grand-daughter
8	Other relative
9	Non-relative

Family Expenditure Survey 1985

Coding Frame 21

Type of Interest

(Information Code A260)

<u>Value</u>	<u>Type of Interest</u>
1	National Savings Bank Ordinary Account (NSB-OA)
2	National Savings Bank Investment Account (NSB-IA)
3	Trustee Savings Bank (TSB)
4	Building Society (BS)
5	High Street Bank (HSB)
6	Any other Savings Banks or Societies (AOSBS)
7	NSB-OA + NSB-IA
8	NSB-OA + BS
9	NSB-OA + HSB
10	NSB-IA + BS
11	NSB-IA + HSB
12	BS + HSB
13	NSB-OA + NSB-IA + BS
14	NSB-OA + NSB-IA + HSB
15	NSB-OA + BS + HSB
16	NSB-IA + BS + HSB
17	NSB-OA + NSB-IA + BS + HSB
18	NSB-OA + TSB
19	TSB + BS
20	TSB + HSB
21	TSB + BS + HSB
22	HSB + AOSBS
23	NSB-OA + NSB-IA + TSB
24	NSB-OA + TSB + BS
25	NSB-OA + TSB + HSB
26	BS + AOSBS
27	BS + HSB + AOSBS
28	NSB-OA + TSB + BS + HSB
29	NSB-IA + TSB
30	NSB-IA + AOSBS
31	NSB-OA + BS + AOSBS

continued on page 91A

Value	Type of Interest
32	NSB-OA + BS + HSB + AOSBS
33	NSB-OA + NSB-IA + BS + HSB + AOSBS
34	NSB-IA + TSB + BS
35	TSB + BS + AOSBS
36	NSB-OA + NSB-IA + TSB + BS
37	NSB-OA + NSB-IA + TSB + BS + HSB
38	NSB-OA + TSB + HSB + AOSBS
39	NSB-IA + TSB + BS + HSB
40	NSB-IA + HSB + AOSBS
41	NSB-OA + TSB + BS + AOSBS
42	NSB-OA + AOSBS
43	NSB-IA + BS + HSB + AOSBS
44	TSB + AOSBS
45	TSB + BS + HSB + AOSBS
46	NSB-IA + BS + AOSBS

FAMILY EXPENDITURE SURVEY 1985

Coding frame 22

Ranges of Personal Gross Employee Earnings
(Information code A248)

Range No.	From £'s per week	To £'s per week
1	0.000	29.999
2	30.000	34.999
3	35.000	39.999
4	40.000	44.999
5	45.000	49.999
6	50.000	59.999
7	60.000	69.999
8	70.000	84.999
9	85.000	99.999
10	100.000	114.999
11	115.000	134.999
12	135.000	164.999
13	165.000	194.999
14	195.000	224.999
15	225.000	254.999
16	255.000	284.999
17	285.000	334.999
18	335.000	384.999
19	385.000	434.999
20	435.000	534.999
21	535.000	634.999
22	635.000	Infinity

Family Expenditure Survey 1985

Coding Frame 23

Economic Position

(Information codes A090, A094, A178 and A202)

Value	Economic Position	Remarks
1	Self-employed	These values are formed by computer from information codes A004, A005, A201, A207 and A220 and product code U21P
2	Full-time employee at work	
3	Part-time employee at work	
4	Full-time employee temporarily away from work	
5	Part-time employee temporarily away from work	
6	Retired and of minimum NI pension age	
7	Retired but under minimum NI pension age	
8	Unoccupied and of minimum NI pension age	
9	Unoccupied but under minimum NI pension age	
10	Employee out of a job - worker	
11	Employee out of a job - non worker	

Family Expenditure Survey 1985

Coding Frame 24

Combination of durable goods available
(Product code 487P and information code A190)

Value	Durables owned						Value	Durables owned					
1	T	-	-	-	-	-	32	-	-	-	-	-	C
2	-	TV	-	-	-	-	33	1	-	-	-	-	C
3	T	TV	-	-	-	-	34	-	TV	-	-	-	C
4	-	-	W/M	-	-	-	35	1	TV	-	-	-	C
5	T	-	W/M	-	-	-	36	-	-	W/M	-	-	C
6	-	TV	W/M	-	-	-	37	1	-	W/M	-	-	C
7	1	TV	W/M	-	-	-	38	-	TV	W/M	-	-	C
8	-	-	-	R	-	-	39	1	TV	W/M	-	-	C
9	1	-	-	R	-	-	40	-	-	-	R	-	C
10	-	TV	-	R	-	-	41	T	-	-	R	-	C
11	1	TV	-	R	-	-	42	-	TV	-	R	-	C
12	-	-	W/M	R	-	-	43	1	TV	-	R	-	C
13	T	-	W/M	R	-	-	44	-	-	W/M	R	-	C
14	-	TV	W/M	R	-	-	45	T	-	W/M	R	-	C
15	1	TV	W/M	R	-	-	46	-	TV	W/M	R	-	C
16	-	-	-	-	C/H	-	47	T	TV	W/M	R	-	C
17	T	-	-	-	C/H	-	48	-	-	-	-	C/H	C
18	-	TV	-	-	C/H	-	49	1	-	-	-	C/H	C
19	1	TV	-	-	C/H	-	50	-	TV	-	-	C/H	C
20	-	-	W/M	-	C/H	-	51	1	TV	-	-	C/H	C
21	1	-	W/M	-	C/H	-	52	-	-	W/M	-	C/H	C
22	-	TV	W/M	-	C/H	-	53	T	-	W/M	-	C/H	C
23	T	TV	W/M	-	C/H	-	54	-	TV	W/M	-	C/H	C
24	-	-	-	R	C/H	-	55	1	TV	W/M	-	C/H	C
25	T	-	-	R	C/H	-	56	-	-	-	R	C/H	C
26	-	TV	-	R	C/H	-	57	T	-	-	R	C/H	C
27	T	TV	-	R	C/h	-	58	-	TV	-	R	C/h	C
28	-	-	W/M	R	C/H	-	59	1	TV	-	R	C/h	C
29	T	-	W/M	R	C/H	-	60	-	-	W/M	R	C/h	C
30	-	TV	W/M	R	C/H	-	61	T	-	W/M	R	C/H	C
31	T	TV	W/M	R	C/h	-	62	-	TV	W/M	R	C/h	C
							63	T	TV	W/M	R	C/h	C
							*64	-	-	-	-	-	-

T = Telephone; TV = television; W/M = Washing Machine,
R = Refrigerator; C/H = Central Heating, C = Car

* Value 64 can only appear at code A190

FAMILY EXPENDITURE SURVEY 1985

Coding Frame 25

Type of accommodation occupied by
the household
(Information Code A123)

Value	Type of Accommodation
1	Whole house detached
2	Whole house semi-detached
3	Whole bungalow detached
4	Whole bungalow semi-detached
5	Whole house/bungalow, terraced or end terraced
6	Purpose built flat or maisonette in block - with lift
7	Purpose built flat or maisonette in block - without lift
8	Part of house/converted flat or maisonette/rooms in house - with lift
9	Part of house/converted flat or maisonette/rooms in house - without lift
10	Dwelling with business premises
11	Mobile home/caravan/houseboat
12	Any other type of accommodation

FAMILY EXPENDITURE SURVEY 1985

Coding frame 26

Income from education grants, scholarships etc -
source of grant, level of education and type of
establishment attended

(Information codes A252)

Value	Source	Level	Establishment
1	State	Up to 'A' Level	State
2	"	" " " "	Private
3	"	Above 'A' Level	State
4	"	" " "	Private
5	"	DK/Other	State
6	"	" "	Private
7	Private	Up to 'A' Level	State
8	"	" " " "	Private
9	"	Above 'A' Level	State
10	"	" " "	Private
11	"	DK/Other	State
12	"	" "	Private
13	Overseas	All Levels	Either

FAMILY EXPENDITURE SURVEY 1985

Coding Frame 27

Head of Household out of a job
(Information code A075)

Value	Description	Remarks
1	Unemployed - worker	Heads coded value 3 at code A201 and value 1 at code A015
2	Unemployed - non worker, away from work for more than one year	Heads coded value 3 at code A201 and greater than 52 at code A208
3	Unemployed - non worker, has never worked	Heads coded value 3 at code A201 and not coded at code A210
4	Sick but intending to seek work - worker	Heads coded value 4 at code A201 and value 1 at code A015
5	Sick but intending to seek work - non worker, away from work for more than one year	Heads coded value 4 at code A201 and greater than 52 at code A208
6	Sick but intending to seek work - non worker, has never worked	Heads coded value 4 at code A201 and not coded at code A210

FAMILY EXPENDITURE SURVEY 1985

Coding frame 28 Amount of Save As You Earn, National Savings Certificates and Premium Bonds held
 (Information code A2b4 and A2b1)

Value	Range of holdings of SAYE, NSC, Premium Bonds
1	£ 1.00 to £ 50.00
2	£ 51.00 to £ 100.00
3	£ 101.00 to £ 250.00
4	£ 251.00 to £ 500.00
5	£ 501.00 to £1,000.00
6	£1,001.00 to £1,500.00
7	£1,501.00 to £2,000.00
8	£2,001.00 to £2,500.00
9	£2,501.00 to £3,000.00
10	£3,001.00 to £5,000.00
11	£5,001 to £10,000.00
12	£10,001 or over
13	D. K.

FAMILY EXPENDITURE SURVEY 1985

Coding Frame 29 Imputation of Income
(Information code A245)

Value	Item of Income which has been Imputed
1	Self-employment income (codes 326, 307, 328, 313)
2	Interest from Ordinary Savings A/C (code 373)
3	" " Investment A/C (code 333)
4	" " T.S.B. A/C (code 371)
5	" " Building Society (code 376)
6	" " Other savings A/C (code 374)
7	" " British Savings Bonds (code 408)
8	" " Unit Trusts (code 415)
9	" " Stocks, shares etc (code 378)
10	Any other imputed income

NB The code can appear more than once, depending on how many items of income have been imputed.

FAMILY EXPENDITURE SURVEY 1985

Coding Frame 30 Items included in rent
(Information code A132)

Value	Description
1	Rent + WR + SR + ER
2	Rent + WR + SR + ER + heating costs (amounts not known)
3	Rent + WR + SR + ER + other services (amounts not known)
4	Rent + WR + SR + ER + heating costs and other services (amounts not known)
5	Rent only
6	Rent only + heating costs (amounts not known)
7	Rent only + other services (amounts not known)
8	Rent only + heating costs and other services (amounts not known)
9	Rent + WR + SR + ER + heating costs (amounts known)
10	Rent + WR + SR + ER + other services (amounts known)
11	Rent + WR + SR + ER + heating costs and other services (amounts known)
12	Rent only + heating costs (amounts known)
13	Rent only + other services (amounts known)
14	Rent only + heating costs and other services (amounts known)
15	Not used

NB If some 'other services' costs are known and some are not, treat as 'amount not known'.

Check that these spenders have been asked these questions on S 835A
 14, 44-49, 51, 62-76, 81-82

Income Schedule
MASTER SCHEDULE

Area	Ser	Hid
3 digit	2 digit	UR 1-3

To all

1 Are you doing any kind of paid work at present?

Include person absent due to holidays, strikes, sickness, injury, or temporarily laid off as long as they have a job to return to. Include student 16 or over if working at present.

Yes Y Y - Ask (a)
 No X X - Go to (b)

(a) Are you

Working [an employee* (inc CP/ACE †)
 self-employed** or employer

1 1 - Go to 2
 2 2 - Go to 2

*Employee includes, all working regularly for an employer irrespective of hours worked per week; directors of limited companies

**Self employed includes all working regularly irrespective of number of hours worked per week, also include childminders.

Exclude mail order agent and baby sitter

(b) Probe the situation and code below

Intending to work [Out of employment but seeking or about to start work (inc TOPS/ATS YTS/YTPs)
 Out of employment because of sickness or injury but intending to seek or about to start work
 Not Working [Sick or injured but not intending to seek work
 Retired (incl Job Release Scheme)
 None of these

3 3 - Go to 4
 4 4 - Go to 4
 5 5 - See 6
 6 6 - Go to 5
 7 7 - See 6

† Receiving a wage
 CP = Community Programme (Great Britain)
 ACE = Action for Community Employment (N Ireland)

‡ Receiving an allowance
 TOPS = Training Opportunity Scheme (Great Britain)
 ATS = Attachment Training Scheme (N Ireland)
 YTS = Youth Training Scheme (GB)
 YTP = Youth Training Programme (NI)

Economic position who supplied for private matching

1-7	1-7
A201	A201
1-3	1-3
A285	A285
1-2	1-2
A286	A286

See Q 62 (g) A schedule
See Q 63 A schedule

To all Employees (code 1 at 1) and Self-Employed (code 2 at 1)

2 For how many weeks have you done regular paid work in the last 12 months that is since ?

Per No		Per No		Per No	Per No
£	p	£	p		
Person number					
1-52					
A215					

Employees ask 3
Self-employed go to 9

Include Paid Holidays and Paid Sick Leave Exclude strike periods

To all Employees (coded 1 at 1)

3 Have you been away from work today?

Probe to find out whether day of interview is a normal working day - if normal working day and away from work code Y

Yes	Y	Y
No	X	X

Ask (a)
Go to 9

(a) Have you been away from work for more than the last 3 working days?

Yes	Y	Y
No	X	X

Ask (I)-(III)
Go to 9

(i) What is the reason for your absence

illness or accident	1	1
holiday	2	2
strike	3	3
other?	4	4

Ask (II)

Running prompt

Per No	Specify	1-4	1-4
Per No	Specify	A207	A207

Specify on left and ask (II)

(ii) Are you receiving

full pay from your employer	1	1
part pay or made up pay	2	2
no pay?	3	3

Running prompt

1-3	1-3
A209	A209

(III) How many weeks in all have you been away from work during this spell of absence?

If less than one week, give days

Number of Weeks away from work (limit 260)	1-3	1-3
A208	A208	A208

Go to 9

To all intending to work (coded 3 or 4 at 1)

DNA Others	N	N
Exclude students school leavers yet to start first job	S	S

Go to 9
Go to 42

4 How many weeks is it since you did any regular paid work?

Number of Weeks away from work (limit 260)	A208	A208
--	------	------

If less than 52 weeks ask (a)
If 52 weeks or more go to 9

(a) For how many weeks have you done regular paid work in the last 12 months that is since ?

Include Paid Holidays and Paid Sick Leave Exclude strike periods

Number of Weeks worked in last 12 months (1-52)	A215	A215
---	------	------

Go to 9

To all retired (coded 6 at 1)

5 In what year did you retire?

Year 19

If less than 2 years ago ask (a) and (b) If 2 years or more go to 42

(a) What was the exact date of your retirement?

Per No		Per No		Per No	Per No
£	p	£	p		
Person		number			
A206		A206			
302		8			
302		8			

(b) How much did you earn from your job (before tax) in the 12 months just before you retired?

- Go to 42

To men aged under 65 and women aged under 60 and coded 5 or 7 at 1

DNA

N N

- Go to 42

6 Are you prevented from seeking work because you are looking after a sick or aged relative?

Yes

1

- Go to 8

No

2

- Ask 7

Whether looking after sick/aged relative.

7 (As far as you know) are you permanently unable to work?

Yes

1

- Ask (a)

No

2

- Go to 8

(a) Could you tell me why you are permanently unable to work?

Whether permanently unable to work

Per No

Reason

1 or 2		1 or 2			
A217		A217			
A221		A221			

Per No

Reason

8 Have you done any regular paid work during the last 12 months that is since ?

Yes

Y

- Ask (a)-(c)

No

X

- Go to 42

(a) For how many weeks did you work? Include Paid holiday paid sick leave Exclude strike periods

Number of weeks worked in last 12 months (1-52)	
A215	
A215	

(b) What wage/salary did you usually receive each time you were paid after all deductions?

Net take home pay	
380 P	
380 P	

(c) How often were you usually paid?

Week

1

fortnight

2

four weeks

4

calendar month

5

some other period

0

Per No

Specify

Per No

Specify

Specify on left and go to 42

(b) Subsidiary job

Exclude mail order agents and baby sitters

Per No
Occupation
Industry

Per No
Occupation
Industry

Per No	Per No	Per No	Per No
Person number			
E	P		
		N	N
1	if employee		
A212			
1	if self-employed		
A214			
1	if director		
A277			
1	if employee		
A212			
1	if self-employed		
A214			
1	if director		
A277			
		(E)	(E)
		(S)	(S)

DNA

See 10 or 36

Employee

Self employed

See 10 or 36

To all coded 1, 3 or 4 at 1

Most remunerative job (coded E at 9(a))

DNA

10 On what date were you last paid a wage or salary?

If currently working at time of interview and not yet paid (ie new job) give details of current job and anticipated pay

11 What was your wage/salary including overtime bonus commission or tips after all deductions the last time you were paid?

12 How long a period did your last wage or salary cover?

- week _____
- fortnight _____
- four weeks _____
- calendar month _____
- other _____

Period covered by last pay
 Per No Specify last pay
 Per No Specify

13 Did this include a refund of income tax?

- Yes _____
- No _____

(a) How much was the refund?

14 How much was deducted for income tax under PAYE?

(a) Do you usually pay any tax?

- Yes _____
- No _____

Per No Specify

Per No Specify

15 How much was deducted as National Insurance contribution?

Per No	Per No	Per No	Per No
Person number			
£	p	£	p
		N	N
FES week and year when last paid			
A204	A204		
1 or blank			
A250	A250		
Net take home pay			
303 p	303 p		
code if last pay includes: Statutory Sick Pay			
A234	A234		
		1	1
		2	2
		4	4
		5	5
		0	0
1-5	1-5		
A213	A213		
		Y	Y
		X	X
Income tax refund			
304 p	304 p		
PAYE tax deduction			
305 p	305 p		
		Y	Y
		X	X
NI deduction			
306 p	306 p		

- Go to 36

If more than a year ago, no further details required. Go to next job or 42

- Specify on left

- Ask (a)
 - Go to 14

if no tax deducted ask (a). Others go to 15

Specify on left reason why tax not paid

- Ask 15

- Ask 16

Most remunerative job (continued)

16 Were there any other deductions from your wage/salary such as sports club subscriptions to hospitals and charities superannuation or private pension funds?

Yes _____> Y Y
No _____> X X

Itemise composite deductions and enter amounts in correct column

Record details in grid below
Code below and go to 17

Per No	Purpose of deduction (probe fully)	£	P	£	P
	codes to be entered for deductions from pay				
318	superannuation, private pension		P		P
422	Participant sports and specialised pastime		P		P
424	Subscriptions to Trade Union, Professional Associations etc.		P		P
425	Other subscriptions		P		P
426	Charitable gifts				
427	Miscellaneous expenditure on services		P		P
428	cash gifts not allocated elsewhere				
429	All other cases not specified above ALSO TO BE CODED IN A OR D SCHEDULES		P		P

Interviewer to code

Pay slip for pay date at 10

consulted by interviewer
consulted by informant
not consulted

Other pay slip consulted

1
2
3
5
4

Ask (a)
Go to 17
Ask (a)

1-5		1-5	
A235		A235	

S = 3 and 4 ringed

(a) What was the gross wage/salary including superannuation?

£ | £ |

Ask 17

Most remunerative job (continued)

17 How many hours a week do you usually work excluding meal breaks and all overtime?

Per No	Per No	Per No	Per No
Person number			
E	P	E	P
Number of hours a week usually worked (excl. meals and overtime)			
A220	A220		

18 On average how many hours (if any) paid overtime do you actually work in a week?

Average number of hours paid overtime worked per week			
A244	A244		

- See 19 or 20

Ask weekly paid only

19 For how many actual hours work (excluding meal intervals but including paid overtime) were you paid in the weekly pay you told me about?

WEEKLY PAID

Number of hours worked for last pay (incl overtime)			
A216	A216		

- Go to 21

Ask all other pay periods

20 How many hours a week (excluding meal intervals but including paid overtime) did you work during the (Give period at 12) for which you have given me the details of your pay?

OTHER PAY PERIOD

Number of hours worked per week (incl overtime)			
A216	A216		

Ask 21

Ask all employees

21 How many hours paid overtime a week were included in the hours you have just mentioned?

Number of hours paid overtime included			
A219	A219		

If any question cannot be answered because of the irregular nature of the job describe the situation in full

- Ask 22

Most remunerative job (continued)

Show prompt card A

22 Was your last wage or salary affected by any of the following

	Per No		Per No	Per No
	£	p		
(a) Holiday pay or other pay in advance			1	1
Back pay			2	2
Different pay rate for unsociable hours/different shifts			3	3
An occasional bonus			4	4
Irregularly paid overtime			5	5
Deductions from usual pay for NI Benefit received			6	6
Tax refund			7	7
Tax adjustment for previous unemployment benefit/supplementary benefit received			8	8
Absence from work because of sickness			9	9
No to all			X	X

(b) Was your last wage or salary affected by anything else?	Yes		Y	Y
	No		X	X

Specify on left

Specify

23 Your last wage/salary after all deductions was £ (see 11) Is this the amount you usually receive(when at work)?

Yes		1	1
No		X	X

- Go to 24
- Ask (a)-(c)

Whether pay at code 303 is usual

1 or blank A254	1 or blank A254
--------------------	--------------------

(a) What do you usually receive each time you are paid after all deductions?*	Usual net pay 329 p	Usual net pay 329 p
---	------------------------	------------------------

and

(b) What do you usually receive each time you are paid before all deductions?	Usual gross pay 315 p	Usual gross pay 315 p
---	--------------------------	--------------------------

(c) How often are you usually paid?

week	1	1
fortnight	2	2
four weeks	4	4
calendar month	5	5
some other period	0	0

- Specify on left

Per No Specify

Per No Specify

- Ask 24

Most remunerative job (continued)

Per No		Per No		Per No	Per No
Person		number			
£	p	£	p		
				Y	Y
				X	X

24 Do you ever get an occasional addition to pay such as Christmas or quarterly bonus or an occasional commission?

Yes No - Ask (a)
 - See 25

(a) What payments of this kind have you had in the last 12 months? Please itemise below

Per No	Description	Total amount in last 12 months			Is this amount			If last pay not usual pay ("No" to 23) ask		
		£	p	DK	Does your usual/average pay of £ (23a) include any of this bonus?		NO	YES how much?		
					Before tax	After tax		£	p	
					1	2	3	X		
					1	2	3	X		
					1	2	3	X		
					1	2	3	X		
					1	2	3	X		
					1	2	3	X		

- See 25

Occasional net additions to pay		330	8	330	8
Occasional gross additions to pay		312	8	312	8

DNA. If unemployed for more than 13 weeks (Q4.)

N N - See 31

To all employees (coded 1 at 1)

25 Has Inland Revenue allowed you or will you be claiming tax relief for expenses incurred as a result of your employment such as overalls clothing tools subscriptions to professional societies?

Yes No - Record details in grid below
 - Go to 26

Per No	Description of expenses claimed as tax relief	Period	Amount on which tax relief allowed
			£
			£
			£
			£
			£

Total amount on which tax relief claimed/allowed.		370	8	370	8
---	--	-----	---	-----	---

Ask 26

Most remunerative job (continued)

Show prompt card B

26 Do you have (have you had) any of these items of household expenditure which you have mentioned refunded by your employer?

(a) For each item refunded ask (i)-(iii) and enter details in box below

(i) How much of the £ you mentioned did you have refunded?

(ii) Was any of the refund for this item included in your net pay of £ (See 11) received on (See 10)

(iii) How much was included?

Prompt amounts from A schedule	Yes		No		Per No	Amount refunded		Period covered by refund	Included in net pay			
	Yes	No	£	p		Yes	No		Amount included			
									£	p		
Rent (18)	Y	X			Expenses refunded by employer (editing purposes only)							
Rates (24)	Y	X										
Water/sewerage rates (26)	Y	X										
Mortgage payment (33 or 36)	Y	X										
Insurance on structure (42 or 43)	Y	X										
Gas (54-61)	Y	X										
Electricity (54-61)	Y	X										
Telephone (50)	Y	X										
	Y	X										
Road fund tax (62(a) and 64(a))	Y	X										
	Y	X										
Vehicle insurance (62(d) and 64(d))	Y	X										
	Y	X										
Vehicle purchase (65 and 69-75)	Y	X										
	Y	X										

No refunds → X

Most remunerative job (continued)

27 Do/did you receive a mileage allowance or fixed allowance from your current (last) employer?

Yes _____
No _____

Y Y - Ask (a)
X X - Go to 28

(a) Was any allowance for motoring included in the net pay of £ (see 11) that you received on (see 10)?

Yes _____
No _____

Y Y - Ask (i)
X X - See (b)

(i) How much was included _____

£ I £ I - See (b)

To all giving usual pay at 23(a)

Others DNA

MOTORING EXPENSES REFUNDED BY EMPLOYER (editing purposes only)

(b) Was any allowance for motoring included in your usual net pay of £ (see 23(a))

Yes _____
No _____

Y Y - Ask (i)
X X - Go to 28

(i) How much was included _____

£ I £ I - Ask 28

Employees most remunerative job

28 (In addition to the mileage/ fixed allowance) were there any refunds for motoring expenses included in the net pay of £ (see 11) that you received on (see 10)?

Yes _____
No _____

Y Y - Ask (i)
X X - Go to 29

(i) How much was included _____

£ I £ I Ask 29

29 Did you receive any (other) refunds for business expenditure from your current (last) employer included in the net pay of £ (see 11) you received on (see 10)?

Yes _____
No _____

Y Y - Record details in grid below
X X - Go to 30

Per No	Describe what was covered by refund	Amount refunded			
		£	p	£	p
	Other refunds/allowances received from employers (editing purposes only)				

Ask 30

Ask all those with subsidiary employment as employee (coded "E" at 9(b))

DNA - no subsidiary employment as employee

31 On what date were you last paid a wage or salary?

Per No		Per No		Per No		Per No	
<i>Person</i>		<i>number</i>					
£	p	£	p				

N N

- See 36

32 What was your wage/salary including overtime bonus commission or tips after all deductions the last time you were paid?

<i>1 of blank</i>	<i>1 of blank</i>
A255	A255

<i>last take home pay</i>	<i>last take home pay</i>
<i>309 p</i>	<i>309 p</i>

Pay Period

33 How long a period did this cover?

34 Were any deductions made from your pay before you received it?

Yes No

Y X Y X

Record details in grid below - Go to 35

Itemise composite deductions

Per No	Purpose of deduction	£	p

<i>PAYE Deductions</i>
<i>310 p 310 p</i>
<i>NI deductions</i>
<i>311 p 311 p</i>
<i>Superannuation Private pension widows and dependants</i>
<i>319 p 319 p</i>
<i>other deductions</i>
<i>319 p 319 p</i>

If pay slip consulted enter gross wage of salary inc Superannuation from pay slip

£ .1 £ .1

- Ask 35

35 Were any refunds of allowances for business expenditure from your current employer included in the net pay you received on [SEC 311]

Yes *Refunds/allowances from subsidiary employer (for editing)* No

Y X Y X

- Ask(a) - See 36

(a) How much was included

£ .1 £ .1

- See 36

To all self employed

DNA not self employed
Exclude mail order agent
or babysitter (see 85)

36 How much net profit (or loss) did you receive from your business or profession in the last 12 months for which you have information That is after deducting all expenses and wages but before deducting income tax, NI contributions or money drawn for your own use?

Income covering less than a year is acceptable if business is newly established

If self-employed less than 12 months →
(a) Dates of most recent 12 months for which information is available

Include periods of less than twelve months if business is newly established

Per No		Per No		Per No	Per No
£	p	£	p		
Person		number			
				N	N
Annual net profit from main self-employed job		326 8			
Annual net loss from main self-employed job		307 8			
Value self-supply goods recorded in 'D' books		327 2			
Annual profit from subsidiary self-employed jobs		328 8			
Net profit so far from main self-employed job		313 8			
Ending date for period for which information available		A226			
Number of months covered by period		A227			

Go to 42

Ask (a)

Go to 37

If loss or nil profit is given at 36 ask 37 Others code below and go to 38

Interviewer to code whether documents at 36

S/E business profit

- Consulted by interviewer 1
- Consulted by informant 2
- Not consulted 3

Specify documents

To self employed-
except those giving a profit at 38

37 Do you draw sums of money or cheques regularly
from the business for your own use?

Yes _____
No _____

Per No		Per No		Per No	Per No
£	p	£	p		
<i>Person number</i>					
				Y	Y
				X	X
				£	£
				Z	Z
				Y	Y
				X	X
				£	£
				£	£
				Z	Z
				£	£
				Z	Z
				Z	Z
				Z	Z

- Ask (a)-(d)
- Go to 38

(a) How much on average do you take out each week/month?

DK _____

- Go to 38

(b) How long a period did this cover?

Period _____

(c) In addition to the amount you have
just told me about, do you draw sums
of money or cheques from your business for
the payment of any domestic bills?

Yes _____
No _____

- Ask (I) and (M)
- Ask (d)

*Figures on withdrawals
and yield entered at 32b*

(i) How much on average do you take out
each week/month?

(ii) How long a period did this cover?

Period _____

(d) After deducting the amount you withdrew and
other expenses how much profit (or loss) before
tax did your share of the business yield in the
most recent 12 months for which you have figures?

Profit _____

Loss _____

DK _____

- Ask (I)

- Go to 38

Loss entered at 30f

(i) Dates of most recent 12 months
for which figures are available

Beginning [Month _____
Year _____

Ending [Month _____
Year _____

*Ending date
entered at A 22b*

DK _____

- Code below
then see 40

interviewer
to code
whether
documents
at 37

S/E Income

- Consulted by interviewer 1
- Consulted by informant 2
- Not consulted 3

Specify documents

To self employed
except those answering 36 & 36(a) or 37(a)-(d)(1)

Per No	Per No	Per No	Per No
Person	number	Person	number
E	P	E	P
Turnover used to			
impute answer			
or 326/307			
Beginning	Month		
	Year		
Ending	Month		
	Year		
	DK	Z	Z
Sole owner		S	S
In partnership		P	P
Partnership information used for editing			
Yes		Y	Y
No		X	X
(I) How much was included?		E	E
Single code			
10-12 or 20-22			
A203			

38 What was the total turnover of the business during the most recent 12 month period for which you have figures?

(a) Dates of most recent 12 months for which figures are available

Beginning [Month Year]

Ending [Month Year DK]

- Ask (a)

- Ask 39

To all answering 36 or 38

39 Are you the sole owner of your business or are you in partnership with someone else?

Sole owner
In partnership

(a) Have your partners shares been included in the net profit loss or turnover you gave me?

Yes
No

(I) How much was included?

- Go to 40

- Ask (a)

- Ask (I)

- Go to 40

Ask 40

To all self employed

40 Apart from meal breaks do you usually work

Running more than 30 hours a week?
prompt or 30 hours a week or less?

(1)
(2)

1 job only > 30 hrs per wk = 10
Main job & Subsidiary both > 30 hrs = 11
Main job > 30 hrs, Subsidiary < 30 hrs = 12
1 job only < 30 hrs per wk = 20
Main job < 30 hrs, Subsidiary > 30 hrs = 21
Main job & Subsidiary both < 30 hrs = 22

- See 41

To all self-employed except those not self employed for last 13 weeks

DNA Not self employed for last 13 weeks →

Show prompt card C

41 What proportion of your expenditure relating to this accomodation only which you have already told me about have you claimed /will you be claiming as a business expense for tax purposes?

Per No		Per No	
Person		number	
N		N	
No	%	Nd	%
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	
X		X	

- Go to 42

Prompt amounts from A schedule

Relating to this accommodation only →

- Vehicle expenses (62 64 65 69-75) →
- Rent (18) →
- Mortgage payments (33 or 36) →
- Rates (24) →
- Water/sewerage rates (26) →
- Insurance on structure (42 or 43) →
- Gas (54-61) →
- Electricity (54-61) →
- Telephone (50) →
- Anything else →
- Specify _____
- Specify _____

Proportion % expenditure claimed as business expenses (for editing purposes only)

*Where 36 has been answered the proportions claimed in that year are preferable to future claims Actual amounts of expenses refunded can be given If proportions cannot

No expenditure claimed → X X

If subsidiary job as employee go back to 31

If subsidiary job as self-employed ask 36 etc using margin at left for answers

To all

42 Do you receive any refunds or allowances from an organisation for which you do unpaid work eg a club council or charitable organisation?

Yes → Y Y
No → X X

Ask (a) - (d) and record details in grid below - Go to 43

- (a) What does the refund/allowance cover?
- (b) What type of organisation gives the refund/allowance?
- (c) How much do you receive on average in a week/month/year?
- (d) What period did this cover?

Per No	(a)	(b)	(c)	(d)
	Covered by refund/allowance	Type of organisation	Amount received £ p	Period
	Refunds for unpaid work (for editing purposes)			

Per No	Per No
Y	Y
X	X

See 43

To all men under 66 coded 2-7 at 1 and all women under 61 coded 2-7 at 1

Per No	Per No	Per No	Per No
Person number E P E P			
		N	N
		Y	Y
		X	X
NI deductions for Self-employed & Non-employed 338 P 338 P			
Child Benefit (incl one parent benefit) 337 P 337 P			
		Y	Y
		X	X
NI Retirement Pension Old Person Pension 338 P 338 P			
		Y	Y
		Y	Y
		X	X
NI Widows Benefit 339 P 339 P			
		Y	Y
		X	X
War disability pension related state allowance 340 P 340 P			
		Y	Y
		X	X

43 Do you pay a regular National Insurance contribution?
Exclude lump sum payments which go at 88

DNA Employees
Yes
No

Go to 44
- Ask(a) & (b)
- Go to 44

(a) How much was the last contribution you paid?

(b) How long a period did this cover?

Period

To all
Are you at present receiving any of these state benefits?
Show prompt card 1 (benefits book)

Exclude Supplementary benefit from 44 to 51
Exclude Christmas bonus from 44 to 51

44 Child benefit
Include one parent benefit

Yes
No

- Ask(a) & (b)
- Go to 45

(a) What was the amount of benefit you last received?

(b) How long a period did this cover?

Period

45 NI retirement pension or
Old person's pension
Include additional pension
Exclude Attendance Allowance (See 50)
and Job Release Allowance (See 65)

Yes
Yes
No to both

- Ask (a) and (b)
- Go to 46

(a) What was the amount of benefit you last received?

(b) How long a period did this cover?

Period

46 NI Widows benefits
(Include earnings-related supplement)
Enter War Widow's benefit at 65

Yes
No

- Ask (a) and (b)
- Go to 47

(a) What was the amount of benefit you last received?

(b) How long a period did this cover?

Period

- Ask 47

47 War disability pension and related State allowance

Yes
No

- Ask(a) & (b)
- Go to 48

(a) What was the amount of benefit you last received?

(b) How long a period did this cover?

Period

Ask 48

To all
Show prompt card 2

48 Mobility allowance

Yes
No

Per No		Per No		Per No	Per No
£	p	£	p		
Person number					
				Y	Y
				X	X

- Ask(a) & (b)
- Go to 49

(a) What was the amount of benefit you last received?

Mobility allowance			
417	p	417	p

(b) How long a period did this cover?

Period

49 Severe Disablement Allowance or

Non-contributory invalidity pension or

Housewives' non-contributory invalidity pension

Yes
Yes
Yes
No to all

				Y	Y
				Y	Y
				Y	Y
				X	X

- Ask (a)&(b)
Go to 50

(a) What was the amount of benefit you last received?

Severe disablement allowance or Non-contributory invalidity pension or Housewives' non-contributory invalidity pension			
418	p	418	p

(b) How long a period did this cover?

Period

50 Attendance allowance

Yes
No

				Y	Y
				X	X

- Ask(a) & (b)
- Go to 51

(a) What was the amount of benefit you last received?

Attendance allowance			
421	p	421	p

(b) How long a period did this cover?

Period

Ask 51

To all except HoH

51 Housing benefit rebate/allowance from your local authority or local DHSS office

Yes
No
DNA, HoH

- Ask (a)-(c)
- Go to 52

(a) What was the amount of Housing benefit/rebate/allowance you last received?

Housing Benefit except received by HoH.			
323	p	323	p

(b) How long a period did this cover?

Period

(c) Did the amount you mentioned include Housing Benefit Supplement?

Yes
No

Housing Benefit Supplement			
Housing Benefit Supplement except received by HoH			
324	p	324	p

Y - Ask (f)
X - Go to 52

(f) How much was included?

324	p	324	p
-----	---	-----	---

Ask 52

To all

Show prompt card 3

52 In the last 12 months that is since have you received Statutory Sick Pay from your employer?

Yes No Y X Ask (a) & (b) Go to 53

STATUTORY SICK PAY

(a) For how many weeks did you receive Statutory Sick Pay?

Number of weeks received in last 12 months
A278

Imputed gross payment
388 P

(b) Are you receiving Statutory Sick Pay at present?

Yes No 1 X 1 X

Whether receiving benefit at present

1 or blank
A279

(In addition to Statutory Sick Pay) have you received any of these State benefits in the last 12 months that is since ?

Exclude Supplementary benefit from 53-54

Exclude Christmas bonus from 53-54

53 NI sickness benefit

Yes No Y X - Ask (a) - (d) - Go to 54

NI SICKNESS BENEFIT

(a) For how many weeks did you receive this benefit?

Number of weeks received in last 12 months
A224

(b) What was the amount of benefit you last received?

Last Payment
363 P

(c) How long a period did this cover?

Period

(d) Are you receiving benefit at present?

Yes No 1 X 1 X Ask 54

Whether receiving benefit at present

1 or blank
A225

To all

54 Contributory invalidity pension and
invalidity allowance
Include additional pension

Yes _____

Yes CONTRIBUTORY INVALIDITY

No PENSION

Per No	Per No	Per No	Per No
Person number			
£	p	£	p
		Y	Y
		Y	Y
		X	X
Number of weeks received in last 12 months			
A258	A258		
Last Payment			
369	P	369	P
Period			
Yes _____		1	1
No _____		X	X
1 or blank			
A259	A259		

- Ask (a) - (d)

- See 55

- See 55

(a) For how many weeks did you receive this benefit?
(b) What was the amount of benefit you last received?

(c) How long a period did this cover?
(d) Are you receiving benefit at present?

Whether receiving benefit at present

To those coded yes to 52 or 53 or 54

Others DNA _____

55 Are/were you being paid by your employer as well as receiving Statutory Sick Pay and/or NI Sickness Benefit/Contributory Invalidity Pension?

Yes _____

No _____

DK _____

(a) Are/were you being paid

Prompt every week by your employer
for only some of the weeks that you were receiving ?

Whether paid by employer all or some of weeks receiving benefit

(i) For how many weeks are/were you being paid?

		N	N
		Y	Y
		X	X
		Z	Z
		1	1
		2	2
1 or 2			
A272	A272		
Number of weeks paid by employer			
A267	A267		

- Go to 56

- Ask (a)

- Go to 56

- Go to 56

- Ask (i)

- Ask 56

To all men aged under 66
women aged under 61

56 Have you taken part in a government training scheme in the last 12 months?

DNA Others

Per No Per No

- Go to 57

Yes

Y Y

- Ask (a) - (e)

No

X X

- Go to 57

(a) Was it

Training Opportunities Scheme (TOPS)

1 1

or Youth Training Scheme (YTS)?

2 2

Other

3 3

Specify on left

Specify scheme

Type of Government Training Scheme

1-3 or blank A246	1-3 or blank A246
-------------------------	-------------------------

(b) For how many weeks did you take part in the scheme/programme?

Number of Weeks of Training Scheme in last 12 months A249	Number of Weeks of Training Scheme in last 12 months A249
--	--

(c) What was the amount of allowance you last received?

Last Payment 382 P	Last Payment 382 P
-----------------------	-----------------------

(d) How long a period did this cover?

Period

(e) Are you receiving benefit at present?

Yes

1 1

No

X X

Ask 57

Whether receiving benefit at present

1 or blank A273	1 or blank A273
--------------------	--------------------

To all

Show prompt card 4

In the last 12 months have you received any of the following benefits?

Exclude Supplementary benefit from 57-59

Exclude Christmas bonus from 57-60

57 Industrial injury disablement pension

Yes

Y Y

- Ask (a)-(d)

(Enter Industrial Widow's pension at 65)

No

INDUSTRIAL INJURY

X X

- See 58

DISABLEMENT PENSION

(a) For how many weeks did you receive this benefit?

Number of weeks received in last 12 months A205	Number of weeks received in last 12 months A205
--	--

(b) What was the amount of benefit you last received?

Last Payment 325 P	Last Payment 325 P
-----------------------	-----------------------

(c) How long a period did this cover?

Period

(d) Are you receiving benefit at present?

Yes

1 1

No

X X

See 58

Whether receiving benefit at present

1 or blank A238	1 or blank A238
--------------------	--------------------

Ask 58

		Per No	Per No	Per No	Per No
		Person number E P E P			
58	N I Unemployment Benefit Exclude TOPS/YTS and other training allowances	Yes	UNEMPLOYMENT BENEFIT	Y	Y - Ask (a)-(d)
		No		X	X - Go to 59
(a)	For how many weeks did you receive N I unemployment benefit?	Number of weeks received in last 12 months A222			
(b)	What was the amount of benefit you last received?	Last Payment 362 P			
(c)	How long a period did this cover?	Period			
(d)	Are you receiving benefit at present?	Yes		1	1
		No		X	X
		1 or blank A223		1 or blank A223	
59	Family income supplement	Yes	FAMILY INCOME SUPPLEMENT	Y	Y - Ask (a)-(d)
		No		X	X - Go to 60
(a)	For how many weeks did you receive this benefit?	Number of weeks received in last 12 months A256			
(b)	What was the amount of benefit you last received?	Last Payment 368 P			
(c)	How long a period did this cover?	Period			
(d)	Are you receiving benefit at present?	Yes		1	1
		No		X	X
		1 or blank A257		1 or blank A257	
60	Supplementary benefit Exclude Housing Benefit Include direct payment of gas and electricity	Yes	SUPPLEMENTARY BENEFIT	Y	Y - Ask (a)-(d)
		No		X	X - See 61
(a)	For how many weeks did you receive this benefit?	Number of weeks received in last 12 months A228			
(b)	What was the amount of benefit you last received?	Last Payment 365 P			
(c)	How long a period did this cover?	Period			
(d)	Are you receiving benefit at present?	Yes		1	1
		No		X	X
		1 or blank A229		1 or blank A229	

Check that coded 3 at 1(b) and then ask 59

Whether receiving benefit at present

Whether receiving benefit at present

Whether receiving benefit at present

To women aged under 51 only

Show prompt card 5

In the last 12 months have you received any of the following benefits?

DNA Men and women 51 and over

61 Maternity allowance

Yes

MATERNITY ALLOWANCE

Y

- Go to 64

- Ask (a)-(d)

Exclude maternity pay (see 63)

No

X

X

- Go to 62

(a) For how many weeks did you receive this benefit?

Number of weeks received	
In last 12 months	
A238	A239

(b) What was the amount of benefit you last received?

Last Payment	
341 p	341 p

(c) How long a period did this cover?

Period

(d) Are you receiving benefit at present? Yes

No

(1) (1)
X X

- Ask 62

Whether receiving benefit at present

1 or blank	1 or blank
A240	A240

62 NI Maternity grant

Yes

Y

Y

- Ask (a)

No

X

X

- Go to 63

(a) What was the total amount of grant you have received in the last 12 months?

NI MATERNITY GRANT	
408 8	408 8

63 Maternity pay from your employer under the Employment Protection Act

Yes

(1) (1)
X X

- Ask 64

No

Whether maternity pay received

1 or blank	1 or blank
A274	A274

To all
 Show prompt card 8
 In the last 12 months
 have you received any
 of the following benefits?

84 NI Death grant

Yes	→	Y	Y
No	→	X	X

- Ask (a)
 - Go to 85

(a) What was the total amount of grant you have received in the last 12 months?

NI DEATH GRANT			
407	8	407	8

85 Any NI or State benefit not mentioned earlier? Include Job Release Allowance

Yes	→	Y	Y
No	→	X	X

Specify on left and ask (a) - (d)
 - Go to 86

Per No Specify
 Per No Specify

OTHER NI OR STATE BENEFIT

(a) What was the total number of weeks you have received this benefit?

Number of weeks received in last 12 months	
A232	A232

(b) What was the amount of benefit you last received?

Last Payment	
367	367

(c) How long a period did this cover?

Period

(d) Are you receiving benefit at present? Yes
 No

1	1
X	X

- Ask 86

Whether receiving benefit at present?

1 or blank	1 or blank
A233	A233

86 Christmas Bonus?

Yes	→	Y	Y
No	→	X	X

- Ask (a)
 - Go to 87

(a) What was the total payment in the last 12 months?

CHRISTMAS BONUS			
394	8	394	8

Ask 87

To all
In the last 12 months have you received any of the following benefits?

67 Redundancy payments under Redundancy Payments Act?

Yes

No

Y

X

Y

X

- Ask (a) and (b)

- Go to 68

(a) What was the total amount you have received in the last 12 months?

Redundancy Payments Received in last 12 months
356 8 356 8

(b) How many years were you working with the firm?

- Ask 68

Amount received per completed year of service
357 8 357 8

68 Trade union sick pay or strike pay Friendly Society benefits benefits under private sickness scheme accident insurance hospital savings scheme? (Exclude lump sum benefits and pension)

Yes

No

Y

X

Y

X

- Ask (a) - (d)

- Go to 69

(a) For how many weeks did you receive this benefit?

Number of weeks received in last 12 months
A230 A230

(b) What was the amount of benefit you last received?

Last Payment
366 p 366 p

(c) How long a period did this cover?

Period

(d) Are you receiving benefit at present?

Yes

No

1

X

1

X

- Ask 69

Whether receiving benefit at present

1 or blank
A231 A231

To all

INDIVIDUAL PROMPT

Are you at present receiving

Employee pension from	Per No	If No ring	Own pension Spouse's	Last payment		Period	Was tax deducted at source?		Was last payment before tax? after tax?
				£	p		No	If yes How much? £ p	
69 (a) Central or Local Govt or Armed Forces	X		3 4				X		B A
	X		3 4				X		B A
	X		3 4				X		B A
	X		3 4				X		B A
(b) Nationalised Industry?	X		3 4				X		B A
	X		3 4				X		B A
(c) or Other Previous employers? Specify Industry fully	X		3 4				X		B A
	X		3 4				X		B A
70 Pension as a member of a Trade Union or Friendly Society	X		3 4				X		B A
	X		3 4				X		B A
71 Annuity and personal pension	X						X		B A
	X						X		B A
72 Payment from trust or covenant?	X						X		B A
	X						X		B A

Per No	Per No
Person	Number
£ p	£ p
Public Sector pension net of tax	
342 p	342 p
Tax deducted	
343 p	343 p
344	344
A236	A236
Private Sector pension net of tax	
344 p	344 p
Tax deducted	
345 p	345 p
346	346
A237	A237
Last annuity/personal pension net of tax	
348 p	348 p
Tax deducted	
347 p	347 p
Last trust or covenant payment net of tax	
346 p	346 p
Tax deducted	
347 p	347 p
OTHER DEDUCTIONS	
351 p	351 p

See 73

To all at present receiving an employee pension (coded 3 or 4 at 69(a), (b) or (c))

ALSO INCL IN NET PENSION

73 (Apart from tax) were there any other deductions from your last pension payment?

Per No	Purpose of deductions (probe fully)	Amount		Was deduction made at source?		Was last pension payment	
		£	p	Yes	No	before deductions?	after deductions?
				Y	X	B	A
				Y	X	B	A
				Y	X	B	A
				Y	X	B	A
				Y	X	B	A

Ask 74

To all

Show prompt card D

74 Do you have now or have you had in the last 12 months private savings accounts with any of the banks or societies shown on this card

(a) National Savings Bank (Post Office)

(i) Ordinary Account(s)

Per No	
Yes	1
No	X

(ii) Investment Account(s)?

Yes	2
No	X

(b) Trustee Savings Bank?

(Ordinary Saving Account(s) and Investment Deposit Account(s))

Yes	3
No	X

(c) Building Society?

Yes	4
No	X

(d) High Street Banks?

(Deposit and Savings Account(s))

Yes	5
No	X

(e) Any other savings banks or societies?

Yes	6
No	X

Per No Specify

Per No Specify

If yes, ask 75 for each type of savings

Type of investments
See coding frame

Per No		Per No	
£	p	£	p
Person number			
1-17		1-17	
A260		A260	
ANNUAL INTEREST			
ORDINARY SAVINGS A/c		NATIONAL SAVINGS BANK	
373	8	373	8
INVESTMENT A/c		NATIONAL SAVINGS BANK	
333	8	333	8
TRUSTEE SAVINGS BANK			
371	8	371	8
BUILDING SOCIETY A/c			
376	8	376	8
ANY OTHER SAVINGS A/c			
374	8	374	8

Do not split joint accounts

Per No

Code from 74 (a)-(e)

75 How much interest have you received or been credited with from all your account(s) past and present with the over the last 12 months?

Use separate column for each type of savings							
£	p	£	p	£	p	£	p
	1		1		1		1
Interviewer to code Documents consulted?	Yes	Y	Y	Y	Y	Y	Y
	No	X	X	X	X	X	X

Show prompt card E

76 At present do you (or any of your children under 16) have any money in any of the following

Per No		Per No		Per No	Per No
Person number		Person number		Person number	Person number
E	D	E	D		
				1	1
				X	X
				2	2
				X	X
				3	3
				X	X
				4	4
				X	X
				5	5
				X	X
				6	6
				X	X
				7	7
				X	X
				X	X

Index linked National Savings Certificates

Yes

Other National Savings Certificates

Yes

Save As You Earn (National Savings) Include all issues

Yes

Save As You Earn (Building Societies) Include all issues

Yes

Premium Bonds

Yes

National Savings Income Bonds

Yes

National Savings Deposit Bonds

Yes

No to all

If Yes to any ask (a)

Go to 77

Show prompt card F

Use separate column for each type of savings			
Per No	Code from 76	Per No	Code from 76
1-17		1-17	
A218		A218	
1-13		1-13	
A284		A284	
1-13		1-13	
A261		A261	
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10		10	
11		11	
12		12	
13		13	

TYPE OF INVESTMENTS SEE CODING FRAME

(a) How much money do you and/or your children have in (Prompt savings coded above at 76)

Exclude interest

- £ 1 - 50 → 1
- £ 51 - 100 → 2
- £ 101 - 250 → 3
- £ 251 - 500 → 4
- £ 501 - 1000 → 5
- £ 1001 - 1500 → 6
- £ 1501 - 2000 → 7
- £ 2001 - 2500 → 8
- £ 2501 - 3000 → 9
- £ 3001 - 5000 → 10
- £ 5001 - 10000 → 11
- £10001 or over → 12
- OK → 13

Spender

Child under 16

Ask 77

To all
Show prompt card G

77 In the last 12 months that is since have you received or been credited with any of the following

Interest on

(a) British Savings Bonds or War loan?

Yes

No

(i) What was the total interest over the last 12 months?

Interest and dividends on

(b) Unit trusts?

Yes

No

(i) What was the total interest and dividends over the last 12 months?

Interviewer - Documents consulted? to code

Yes

No

(c) Stocks shares bonds debentures, local authority securities or any other securities after deduction of tax at source?

Yes

No

(i) What was the total interest and dividends over the last 12 months?

Interviewer - Documents consulted? to code

Yes

No

78 In the last 12 months that is since have you received rent from property (including the part of your accommodation you sub-let which you told me about earlier*)?

*at 13 Household Schedule

Yes

No

(a) How much did you receive in the last 12 months before deducting income tax but after deducting all allowable expenses?

Per No		Per No		Per No	Per No
Person number		Person number		Person number	Person number
£	p	£	p		
				Y	Y
				X	X
408	8	408	8		
				Y	Y
				X	X
378	8	378	8		
				1	1
				2	2
				Y	Y
				X	X
378	8	378	8		
				1	1
				2	2
				Y	Y
				X	X
360	8	360	8		

- Ask (i)
- Go to (b)

- Ask (i)
- Go to (c)

Ring documents consulted

- Ask (i)
- Go to 78

Ring documents consulted

- Ask (a)
- Go to 79

- Ask 79

To all

Show prompt card H

79 In the last 12 months that is since have you received any of the following allowances shown on this card that is

- a regular allowance from a friend or relative outside the household
- a regular allowance from an organisation
- maintenance allowance or separation allowance
- an allowance from a local authority or any other source for a foster child
- EEC training allowance?

Yes
No

Y
X

Y
X - Ask (a)&(b)
- See 80

Include - Allowance from member of the armed forces or merchant navy

Exclude - Allowance from spouse not a member of household or who is an absent spender

Regular allowance			
352	P	352	P
from person outside household			
352	P	352	P

(a) How much was the last payment?

(b) How long a period did it cover?

- See 80

To a married person whose spouse is not a member of household or who is an absent spender (it coded 2 in col 5 or not ringed in column 9 of Schedule A page 1)

DNA

N

N - Go to 81

80 How much in total allowances have you received from your husband/wife while he/she has been away?

385	P	385	P
Allowance from spouse not a member of household or an absent spender			
385	P	385	P

(a) How long a period does this amount cover?

(b) (In addition to the allowance mentioned) does your husband/wife pay direct any household expenses?

Yes
No

Y
X

Ask (a) and (b)

Record details in grid below
- Go to 81

Per No	Household expenses paid

- Ask 81

To all

Show prompt card J

81 (In addition to the allowances you have mentioned) are there any items of regular household expenditure which someone outside this household regularly gives you money for?

Yes

No

(a) What was the item(s) of expenditure?

(b) Who gave you the money to pay for the ?

(c) How much was the amount gave you ?

(d) How long a period did it cover?

82 Are there any items of regular household expenditure which someone* outside this household regularly pays directly for you?

Yes

No

(a) What was the item(s) of expenditure?

(b) Who paid for the ?

(c) How much was the amount paid?

(d) How long a period did it cover?

Person E P	Person E P	Per No	Per No
		Y	Y
		X	X
		£	£
		£	£
		£	£
		£	£
		Y	Y
		X	X
		£	£
		£	£
		£	£
		£	£

No be coded at 3j2

for editing purposes

- Ask (a) - (d)

- Go to 82

- Ask (a) - (d)

- Go to 83

- Ask 83

To all

Per No		Per No		Per No	Per No
£	p	£	p		
Person		number			
Yes				Y	Y
No				X	X

83 In the last 12 months that is since have you received any coal or coke from your present (or former) employer?

Yes _____
No _____

Record details in grid below - See 84

Per No	Fuel	Quantity received in last 12 months Tons or cwt	Brand of coke or smokeless fuel	Free	Reduced price	Amount paid (if not free) including haulage costs	
						£	p
	Coal	/	/	X	Y		
	Coal			X	Y		
	Coke			X	Y		
	Coke			X	Y		

- See 84

cwt			
Number of coal/coke received in last 12 months		A247	
A247	A247		
Amount paid by informant			
321	8	321	8
Debated Value minus amount paid by informant			
322	8	322	8

To all men aged 65 & over and women aged 60 & over

DNA Others _____

- Go to 85

84 At present do you have an OAP concessionary pass permit tokens or tickets for bus travel (other than the weekly or season ticket you mentioned)?

Yes _____
No _____

- Ask (a)

No concessionary bus travel provision in area _____

- Go to 85

(a) Is it a free bus pass or permit? _____

half-fare bus pass or permit? _____

flat-fare bus pass or permit? _____

bus tokens or bus tickets? _____

Any other type of concessionary OAP bus pass _____

- Go to 85

Per No Specify

Per No Specify

Specify on left and ask 85

NB If more than one scheme in local authority area establish which one informant has

of male 65 + female 60 +
Type of concessionary travel

1-7	1-7		
A286	A286		

To all

85 During the last 12 months that is since _____ have you received any money as a

mail order agent _____

or as a baby sitter? _____

No to both _____

Per No		Per No		Per No	Per No
E	P	E	P		
Person		Number			

Ask (a) and (b)

- Go to 86

(a) How much did you earn? _____

Earnings as mail order agent or baby sitter in last 12 months			
383	8	383	8

(b) Are you doing this work at present?

Yes _____

No _____

Whether work being done at present

1 or blank	1 or blank
A275	A275

86 During the last 12 months that is since _____ have you received any money for odd jobs or any occasional fees for work or professional advice which we have not yet covered?

If job is a regular commitment do not enter at 86 Instead relevant questions should be asked about employment or self-employment

Yes _____

No _____

Ask (a) - (d) and record details in grid below

- Go to 87

(a) Could you please describe the work or odd job you undertook?

(b) What was the total amount of the fee?

(c) What period did the fee cover?

(d) Dates job took place

Total amount received from odd jobs in last 12 months			
381	8	381	8

Per No	Description of work or advice	(b)		Period covered by fee	(d)			
		Total amount of fee			Dates when job took place			
		E	P		From Month	Year	To Month	Year

- Ask 87

To all

87 During the last 12 months that is since have you paid any income tax direct to Inland Revenue?

Yes
No

Per No		Per No		Per No	Per No
£	p	£	p		
Person		number			

Y Y - Ask (a)&(b)
X X - Go to 88

Exclude National insurance contributions, tax collected through PAYE deductions from wages or salary, or deducted at source from income on investments, pensions and annuities

(a) How much did you pay direct in income tax?

Amount of income tax paid direct		-	
387	8	387	8

- Ask (b) and specify on left

(b) What was the source of income on which you were taxed?

Per No Specify
Per No Specify

88 Has Inland Revenue refunded any income tax direct to you during the last 12 months? Exclude NI refunds and refunds included in wage or salary

Yes
No

Amount of income tax refunded direct			
390	8	390	8

Y Y - Ask (a)-(c)
X X - Go to 89

(a) How much was refunded?

(b) Was this a refund of tax deducted under PAYE?

Yes
No

Y Y
X X

(c) Was this refund received in respect of either unemployment or redundancy?

Yes
No

Y Y - Go to 89
X X - Ask (f)

(f) What was the reason for the refund?

Reasons for refund
1 = PAYE
2 = OTHER
3 = Unemployment

1-3		1-3	
A241		A241	

Per No Specify
Per No Specify

Total amount of refund deleted			
391	8	391	8

- Ask 89

Difference between annual value of grant and amount received cash			
361	8	361	8

Annual value of grant scholarship from A scale 209 or 210			
392	8	392	8

SOURCE - LEVEL - ESTABLISHMENT

1-13		1-13	
A252		A252	

Regular unearned income not elsewhere coded			
384	8	384	8

To all

89 Have you paid any N I Contributions direct to Inland Revenue or Department of Health and Social Security during the last 12 months?

Exclude Deductions from wage or salary or regular self employed non-employed contributions normally shown at 43

Include Lump sum payments by Self-employed (ii proportion of profits) and lump sum back payments by Non-employed

Yes

No

Y

X

Y

X

- Ask (a)

- Go to 90

(a) How much did you pay?

NI Contributions paid direct to I R & DHSS
386 8 386 8

- Ask (i)

(i) What was the reason for this direct payment?

Per No Specify

Per No Specify

- Ask 90

90 In the last 12 months that is since have you sent any money abroad to a private individual or to a charity?

Include both occasional gifts and regular allowances

Private individual

Charity

No to both

1

2

X

1

2

X

- Ask (a)

- See (a) & ask (b)

- Go to 91

To those coded 1 at 90

(a) Has/had the person(s) lived abroad for more than 12 months?

Yes

No

DK

Y

X

Z

Y

X

Z

- Ask (i)

- See (b)

- Ask (i)

(i) How much (in pounds) have you sent abroad to this person(s) in the last 12 months?

Total money sent abroad to individual in last 12 months
334 8 334 8

DK

Z

Z

- See (b)

To those coded 2 at 90

(b) How much (in pounds) have you sent abroad to this charity (charities) in the last 12 months?

Total money sent abroad to charity in last 12 months
334 8 334 8

DK

Z

Z

- See 91

Whether any income reported see coding frame

A245 A245
1-10 or blank 1-10 or blank
A245 A245

Punchers See Page 1 for Second Persons Data

Ask about each dependent under 16

DNA. No dependents under 16 → N - End of income schedule

91 Have any of your children received an income from any source such as earnings from a spare time job interest on a child's bank account or income from a trust fund within the past 12 months?

Prompt for each child

Person number of each child _____				
(a) No income received _____	X	X	X	X
(b) What kind of job or income? _____				
(c) Has he had this income throughout the past 12 months? Yes _____ No _____	Y X	Y X	Y X	Y X
(i) For how many weeks has he had it? _____				
(d) How much did he get last time? _____	£	£	£	£
(e) How often does he get it? _____				
(f) Does he usually dispose of (or save) it all himself _____ partly dispose of (or save) it and give the rest to you _____ give it all to you? _____	0 X Y	0 X Y	0 X Y	0 X Y

Ask (d)
Ask (i)

Fresh card for each person							
Per No		Per No		Per No		Per No	
Dependants under 16: Person number							
£	p	£	p	£	p	£	p
Income from grants/scholarship (A schd 209/2 10)							
392	8	392	8	392	8	392	8
Difference between annual value of grant and amount received in cash							
361	8	361	8	361	8	361	8
Source - level - establishment							
1-13		1-13		1-13		1-13	
A252		A252		A252		A252	
Any other income							
396	8	396	8	396	8	396	8
Amount disposed of by dependant							
397	8	397	8	397	8	397	8

Family Expenditure Survey (SES58)
INCOME SCHEDULE

Social Survey Division OPCS
St Catherine's House
10 Kingway
LONDON WC2B 6JP

→ Full amount
→ Half amount
→ Leave blank

Family Expenditure Survey

In confidence

Area

Date of Interview

Starting date of records

Household Schedule

MASTER SCHEDULE

Ref No	Area	Sex	Hid
	3dig	2dig	1dig
Card Type 1	Year	Week	
	05	2dig	00
Office Use			

Ring	Personal No	(1) Relationship to H O H	(2) Relationship	(3) Sex	(4) Age	(5) Marital Status				(6) Current Full Time Education								(7) Income Unit			(9) ON Use	(10) ON Use	
						Married	Single Widowed Divorced Separated	State schools		Higher Education				Head of unit	Wife of head	Spender (16 & over) Do not ring an exception							
								Both household members	Husband or wife not household member	18 or over	Under 18	Not yet attending school (include playgroups here)	Fewer than ten sessions per week				Ten sessions per week or more	Primary Nursery School Play School	Secondary	Special (eg for handicapped children)			Primary preparatory or secondary
①		H O H	0	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
②		Spouse	①	①		1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
③		Son/daughter/step child	②	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
④		Son-in-law/daughter-in-law	③	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
⑤		Father or mother	④	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
⑥		Father-in-law/Mother-in-law	⑤	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
⑦		Brother/Sister	⑥	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
⑧		Grandson/Granddaughter	⑦	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
⑨		Other relatives	⑧	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1
⑩		Non relative or former child	⑨	1	2	1	2	3	4	1	2	3	4	5	6	7	8	9	1	2	3	1	1

CODES INDICATED FOR CODING
 FRAMES COULD POSSIBLY CHANGE DURING
 THE YEAR. SEE UPDATED CODING NOTES

If household member aged 16+ not ringed give reasons and dates if absent.

P beside a printed code = period code

£	p	Code
Total no of rooms		A114
Total no of rooms occ. solely		A111
Total no of shared rooms		A112
Total no of let or sub let rooms		A113

11 Do any households besides your own household live at

(quote address)

Yes

No

Y - Go to (a)

X - Go to 12

(a) How many other households live at this address?

Number

- Go to 13

12 How many of the following rooms do you have in your accommodation (that is those rooms at this address which you own rent or occupy rent free)?

Prompt all rooms in both grids below and record numbers in single h/h column then go to 14

13 How many of the following rooms are

(a) Occupied solely by your household?

(b) Shared with other household(s)?

(c) Let or sublet?

Prompt all rooms in both grids below and record numbers in multi-h/h columns

Single h/h (12)

Multi h/h (13)

INDIVIDUAL PROMPT	Total No of rooms	Number of rooms		
		occupied solely (a)	shared (b)	let or sublet (c)
Bedroom				
Kitchen				
Scullery used for cooking				
Living room				
Rooms used partly for business				
Totals (incl)				

Single h/h (12)

Multi h/h (13)

INDIVIDUAL PROMPT	Total No of rooms	Number of rooms		
		occupied solely (a)	shared (b)	let or sublet (c)
Rooms used only for business				
Bathroom				
Garage				
Others specify				
Totals (excl)				

Ask 14

To all households

Ask all spenders

- 14 Do (any of) you have a garage (anywhere) which is
- | | | | |
|-------------------------------|----|-----|-----------|
| | No | Yes | How many? |
| rented? | X | Y | |
| Include garage(s) at 12 or 13 | | | |
| rent free? | X | Y | |
| Include car ports if rated | | | |
| owned? | X | Y | |
- If no garage go to 15

If more than one garage ask all relevant questions and note details on left

(a) Is the rent included in any rent you

pay a landlord for your accommodation

or is it paid separately?

Ask (a)
Go to (b)
Go to (b)

(i) How much rent did you pay last time?

(ii) How long a period did this cover?

Period

Garage rent if paid separately 189 p
Garage ground rent if paid separately 189 p

R - Go to (b)
S - Ask (i) and (ii)

Ask (b)

(b) Do you pay a separate rate and/or ground rent for the garage?

Yes

No

	Rates	Ground rent
Yes	Y	Y
No	X	X
(i) How much did you pay last time?	£ 1	£ 1
(ii) How long a period did this cover?		

Ask (i) and (ii)

Go to 15

Ask 15

To all households (Ask HOH only)

15 How many years have you lived at this address?

Years

Months

If less than one year probe for no. of months if known

One month 0100
two months 0200
three months 0300 etc.
one year 0001
two years 0002
three years 0003 etc.

No. of years or months lived at this address
A131

Ask 18

To all households (Ask hoh or wife)

16 Do you rent or do you own this accommodation?

Include caravan, mobile home or houseboat

- Rents → R - Ask (a)
- Owns → O - Go to (b)
- Neither → N - Go to (c)

(a) Do you rent your accommodation

Running prompt

from a Council or New Town Corporation (Include Scottish Special Housing Association, Northern Ireland Housing Executive)

from a housing association

from someone else unfurnished

or furnished?

- 1 → - Go to (d)
- 7 → - Go to (d)
- 2 →
- 3 →

(b) Do you own your accommodation

Running prompt with a mortgage or loan

or outright?

Caravans, mobile homes and houseboats being purchased to be coded 5

- 4 → - Go to 24
- 5 → - Go to 24

(c) Do you receive your accommodation rent free?

Yes

No

- 6 → Probe to make certain not codes 1-5 or 7 then ask (d)
- X →

1-6 A120

Blank on 7 A109

(d) Does anyone outside your household pay rent on this accommodation on your behalf? (Exclude local authority or D H SS rent rebate/rent allowance/housing benefit - see 17-23)

Yes

No

- Y - Ask (I)-(III)
- X - Go to (e)

(I) How much rent did they pay last time?

£ |

(II) How long a period did this cover?

Period

(III) Does your employer pay this rent on your behalf?

Yes

No

- Y - Ask (e)
- X - Specify arrangement on left then ask (e)

Specify arrangement and rent paid

To renters coded R at 16 or rent free coded 6 at 16(c)

(e) Is your tenancy dependent on your job?

Yes

No

- 11 → - See 17
- X →

Blank on 1 A110

To all with rented accommodation (Ask hoh or wife) DNA Rent free/owners → N - Go to 24

17 Are you receiving a 100% housing benefit (rebate or allowance) from your local authority or your local Dept of Health and Social Security Office?

Yes → Y - See (a) or (b)

No → X - Go to 18

(a) For all local authority tenants with 100% housing benefit obtain (I) and (II) below from the local authority office DNA. Non-council tenants → N - Go to (b)

(I) Weekly rent payable - →

Include rates, water rates, heating etc if included in rent payable

Housing Benefit		174 P
-----------------	--	-------

(II) Rent includes -

			How much	
	No	Yes	£	p
Rates	X	Y		
W Rates & S Rates	X	Y		
Heating	X	Y		
Other Specify	X	Y		
None of the above		Y		

Heating amount in rent		211 P
------------------------	--	-------

Other services amount in rent		212 P
-------------------------------	--	-------

1-8		A132
-----	--	------

Payments included in rent See Go to 23 coding clause

(b) To all non-local authority tenants with 100% housing benefit, ask (I) and (II) below

(I) How much rent does your local authority or DHSS pay on your behalf? →

include rates, water rates, heating etc if included in rent payable

Housing Benefit		174 P
-----------------	--	-------

DK → ① Go to 23

(II) How long a period does this cover? Period

Blank or 1		A168
------------	--	------

- Go to 23

To all with rented accommodation who pay all or part of their rent

18 How much rent did you actually pay last time (including any rooms you sublet?)

Include rent paid for caravan, mobile home and houseboat

19 How long a period did this cover?

Period

20 Do you have a rent holiday?

Yes

No

(a) For how many weeks of the year?

Weeks

21 Did you receive housing benefit/rent rebate/rent allowance from the Council in connection with your last rent repayment?

Yes

No

(a) Was the housing benefit (rent rebate or allowance)

deducted from the last rent payment?

or returned direct to you in a lump sum that is by cash cheque or giro?

(b) How much was the housing benefit/rent rebate/rent allowance?

DK

(c) How long a period did this cover?

Period

(d) Is the amount for rent you mentioned earlier before or after deduction of the housing benefit/rent rebate/rent allowance?

Before

After

22 Does the rent you mentioned include any services such as

Running lighting cleaning
Prompt heating lift
hot water gardener
TV licence
or any other services?

Yes

No

Exclude gas/electricity budget/credit schemes which would appear at 54(a)

Type of service	E	P

E	P	Code
Rent and rates etc 010 P		
Not paid separately but after any rebate has been deducted		
Rent Rebate 230 P		
Blank or 1 A169		
Any services included in rent 027 P		
Net rent or gross rent 020 P		

Y - Ask(a)
X - Go to 21

Y - Ask(a)-(d)
X - Go to 22

D
L

1 Go to (d)

B
A

Record details
Y - In grid
X - Go to 23

Ask 23

If unclear for services see known

		£	p	Code	
To all with rented accommodation (Ask hoh or wife)					
23 Does the rent include rates?	Yes	Blank or 1			① Go to 25
	No				X - Ask 24
<hr/>					
To all households except those coded 1 at 23 (Ask hoh or wife)					
24 Do you pay rates on this accommodation?	Yes				Y - Ask (a) and (b)
	No				X - Go to 25
(a) How many times a year do you pay rates?	No of times				
(b) How much did you actually pay last time in rates?		Last net rates payment	030	P	
<hr/>					
To all households (Ask hoh or wife)					
25 Is your accommodation connected to the mains sewerage?	Yes				Y
	No				X
} Ask 26					
26 Do you pay separate water and/or sewerage rates?	Yes				Y - Ask (a) and (b)
	No				X - Go to 27
(a) How many times a year do you pay water and/or sewerage rates?	No of times				
(b) How much did you actually pay last time in water and/or sewerage rates?		Water rates and sewerage rates paid separately	050	P	
27 Do you pay separate land drainage rates?	Yes				Y - Ask (a) and (b)
	No				X - Code at foot of page and go to 28
(a) How much was your last payment?		Drainage rates if paid separately	030	P	
(b) How long a period did this cover?	Period				Code below and ask 28

Interviewer to code whether documents	General rates		Specify documents		Water/sewerage rates		Specify documents	
	Seen by interviewer	Consulted by informant	1	2	Seen by interviewer	Consulted by informant	1	2
	Not consulted		3		Not consulted		3	

8.

To all households
(Ask hoh or wife)

28 In the past 12 months that is since
have you received any housing benefit
(rates rebate)?

DNA Others		£	p	Code
Yes	_____			
No	_____			

See 28
1 - Ask (a) and (b) and 29
X - See 29

(a) Was rates rebate/housing benefit deducted
from your last rates/rent payment?

Blank or 1			A140
Yes	_____		
No	_____		

Y - Ask (i) - (iii)
X - Go to (b)

(i) How much was deducted? _____

Rates rebate deducted		040 P
DK	_____	

1 - Go to (b)

P1 = Period code given at 010 (Q18) or 030 (Q24)

P2 = Period code given at 040 (Q28(a))

(ii) What period did this rebate/housing
benefit cover?

Blank or 1		A171
Period	P1 P2	A148

DK	_____	O
Before	_____	B
After	_____	A

(iii) Was the amount you paid last time in
rates/rent, that is (See 18 24)
before or after deduction of the rebate/
housing benefit?

(b) In the last 12 months that is since
have you had any housing benefit (rates
rebate) refunded direct to you that is a
lump sum in cash cheque or Giro?

Yes	_____	Y - Ask (i)-(iii)
No	_____	X - Go to 29

(i) How much was/were the amount(s) refunded?

Rebate 1	Total rates rebate	047 8
Rebate 2	rebate direct	047 8
DK	_____	

1 - Go to 29

(ii) What period(s) did the rebate(s)/housing benefit cover?

Rebate 1	Period	
Rebate 2	Period	
DK	_____	O

(iii) In which month(s) and year(s) did you
receive it/them?

Rebate 1	Date	/	
	(Month)	(Year)	
Rebate 2	Date	/	
	(Month)	(Year)	

Most recent direct rebate	014 P
Date of most recent rebate	A127

Ask 29

To all with housing benefit (coded Y at 17 or Y at 21) and/or rate rebate (coded 1 at 28)

29 Did the rebate/allowance include Housing Benefit Supplement?

DNA Others

N - Go to 30

Yes

Y - Ask (a)&(b)

No

DK

X } Go to 30
①

(a) How much Housing Benefit Supplement was included?

DK

① Go to 30

(b) What period did this cover?

Period

Code below then ask 30

	Housing benefit supplement	Specify documents
Interviewer to code whether documents.	Seen by interviewer	1
	Consulted by informant	2
	Not consulted	3

To all households (Ask hoh or wife)

30 In connection with this accommodation do you pay any of the following

Running Prompt ground rent
feu duty (Scotland)
chief rent
service charge
compulsory or regular
maintenance charges
site rent (caravans)
any other regular payments?

Yes to any

Y - Record details in grid below

No to all

X - See 31

Type of charge	Period covered by last payment		
		Other regular payments	060 P
		tax	060 F
		plus address	060 F

See 31

To all who own with mortgage or loan (Coded 4 at 18(b)
(Ask hoh or wife)

Exclude second mortgages not for the purchase
of this accommodation (see Q68)

DNA Coded 1-3, 5-7 at 18(a) & (b)

N - Go to 43

31 Did you get the mortgage or loan to
purchase your accommodation from a

Running prompt

- Building Society
- Local Authority
- Bank
- Insurance company
- Other source?

- 1
- 2
- 3
- 4
- 5 - Specify on left

Specify

£	p	Code
1-5		A119-

32 Did the last mortgage or loan
payment you made cover

Prompt

- interest only? 8 - Ask 33
- interest and capital/principal? 9 - Go to 36

To those where last payment covered
interest only (coded 8 at 32) (Ask hoh or wife)

33 How much did you pay last time
as interest on the mortgage or loan?

Outstanding	0-1	
Mortgage		130 P

34 How long a period did this cover? Period

35 Is there an endowment policy covering the
repayment of the capital/principal of the
mortgage or loan?

- Yes Y - Ask (a)-(c)
- No X - Specify on left how principal covered and go to 41

Specify

(a) How much was your last insurance premium on
the endowment policy covering the capital/
principal? £

(b) How long a period did this cover? Period

(c) Has this insurance premium been included in
the amount of interest you mentioned earlier?

- Yes Y
 - No X
- Go to 41

To those where last payment covered interest and capital/principal (coded 9 at 32) (Ask hoh or wife)

36 How much was your last instalment on the mortgage or loan?

E	P	Code
Last instalment on mortgage		200 P

37 How long a period did this cover? Period

38 How much interest did you pay over the last year for which you have figures?

Interest paid over last year	150 8
Starting date	A158

Interviewer give dates. From to

Finishing date	A150
----------------	------

39 For how many years have you had the mortgage/loan you have just told me about?

No of years mortgage has run	A133
------------------------------	------

DK

40 How many years does the mortgage/loan still have to run?

Number of years mortgage has to run	A134
-------------------------------------	------

DK

DK to 39 & 40

1-3	A135
-----	------

To all who own with mortgage or loan (Ask hoh or wife)

41 Has standard tax relief on the mortgage already been deducted from the payment you just mentioned?

Yes
No
DK

1	Ask 42
2	
3	

1-3	A163
-----	------

42 Did your last payment on the mortgage/loan which you mentioned earlier that is (see 33 or 36) include other amounts such as insurance on the structure of your accommodation or a mortgage protection policy?

Yes
No

Y - Ask(s)
X - Code at foot page and go

(a) How much of your last payment was for

Running Prompt		None	Amount included	
Insurance on structure	X	£	1	Period covered by this amount
Mortgage protection policy	X	£	1	
Other Specify?	X	£	1	

Mortgage payments

Specify documents

Interviewer to code whether documents	Seen by interviewer	1
	consulted by informant	2
	not consulted	3

Code at foot of page and ask 43

To all households (Ask hoh or wife)

43 Do you pay any (other) insurance premium on the structure of this accommodation?

Yes
No

Y - Ask (a) - (c)
X - Go to 44

£	p	Code

(a) How much was the last premium?

Premium for structure insurance	110	P
---------------------------------	-----	---

(b) How long a period did this cover?

Period

(c) Does this premium also cover contents insurance?

Yes
No

Y - Ask (i)-(iv)
X - Go to 44

If premium covers structure and contents, and items cannot be separated, ask

(i) Total premium paid £ |

(ii) Insured value of house £ |

(iii) Insured value of contents £ |

(iv) How long a period did premium cover? Period

Ask 44

To all households

Ask all spenders

44 Do (any of) you pay any (other) insurance premiums on the furniture and contents of this accommodation?

Yes
No

Y - Ask (a) and (b)
X - Go to 45

(a) How much was the last premium on the furniture and contents?

Premium on contents insurance	168	P
-------------------------------	-----	---

(b) How long a period did this cover?

Period

45 Do (any of) you pay an (additional) insurance premium on any kind of personal possessions?

Yes
No

Y - Ask (a) and (b)
X - Go to 46

Include

- jewellery furs
- cameras boats
- caravans (if not sampled address)
- TV (excluding maintenance contracts)

Exclude

- cars
- maintenance contracts

(a) How much was the last premium?

Premium on personal possessions insurance (add it to contents)	168	P
--	-----	---

(b) How long a period did this cover?

Period

Ask 46

To all households

Ask all spenders

46 Do (any of) you pay premiums on any life death or endowment policies?

Include

Personal pension, annuities, education, house purchase endowment, mortgage protection, fixed term assurance, death and burial

Yes _____

Record details
Y - In grid below

Exclude:

National Insurance, Friendly Societies

No _____

X - Go to 47

Person No paying	Purpose of policy eg House purchase endowment, mortgage protection	When taken out		Period covered by premium (eg cal month year)	£	p	Code
		before April 84	April 84 or later				
	LIFE ASSURANCE ENDOWMENT OR MORTGAGE PROTECTION POLICY TAKEN OUT BEFORE APRIL, 1984	B	A	HOUSE PURCHASE POLICY ENTER CODE 196			P
	LIFE ASSURANCE ENDOWMENT OR MORTGAGE PROTECTION POLICY TAKEN OUT IN APRIL, 1984 OR LATER	B	A	ENTER CODE 197			P
	HOUSE PURCHASE ENDOWMENT POLICY TAKEN OUT BEFORE APRIL, 1984	B	A	ENTER CODE 199			P
	HOUSE PURCHASE ENDOWMENT POLICY TAKEN OUT IN APRIL, 1984 OR LATER	B	A	ENTER CODE 198			P
	MORTGAGE PROTECTION POLICY TAKEN OUT BEFORE APRIL, 1984	B	A	ENTER CODE → 208			P
	MORTGAGE PROTECTION POLICY TAKEN OUT IN APRIL, 1984 OR LATER	B	A	ENTER CODE → 211			P
		B	A				P

Applicable codes to be entered

47 Do (any of) you regularly pay premiums on other policies such as personal accident or private medical insurance?

Include

Friendly Societies, Private medical insurance schemes such as BUPA, PPP etc, Animal insurance

Yes _____

Record details
Y - In grid below

Exclude

Car, motor cycle, house contents or personal possessions insurance, holiday insurance, works sick clubs

No _____

X - Go to 48

Person No paying	Purpose of policy	Insurance company	Period covered by premium (eg cal month year)	£	p	Code
						206 P
						206 P
						206 P
						206 P
						206 P
						229 P

Ask 48

To all households Ask all spenders

48 In your (part of this) accommodation do (any of) you have

a television set

No X Yes Y

IF YES How many?

E	p	Code
Total No. of T. v. Sets in this household		A105
1 or blank		A136
1 or blank		A137

Ask (a) for each

a television game

X (1)

a home computer

X (1)

(a) Do you rent your

	tv set	tv game	home computer
Yes	H	R	R
No	O	O	O
Reg Pay	1	1	1
Slot	2	2	2
Other	3	3	3

Y - Ask (l) for each

X - Go to 49

(l) Do you pay for the TV set and/or TV game and/or home computer by regular payments to a rental company or by slot meter?

1 - Ask 1(a) and 1(b)

2 - Ask 1(c)

3 - Specify on left and ask 1(a) and 1(b)

Specify

1-7		A106
-----	--	------

(1a) How much did you pay last time?

tv set	tv game	home computer
£	p	£
1		1
Period	Period	Period

Last (+total) slot payment 195 P

(1b) How long a period did this cover?

See foot of page and go to 49

If combined with video rental enter video rental £

DK

0

(1c) Did you get a rebate when the meter was last cleared?

Yes

Y Ask (ci) and (cii)

No

X - See foot of page and go to 49

(ci) How much was the rebate before any deductions for hire purchase or credit purchase?

Last gross slot meter rebate 194 P

(cii) How long a period did this cover? Period

See foot of page and go to 49

If more than one rented tv set/tv game/home computer, ask all relevant questions and note details on left

Regular Payments	1
Slot meter	2
Other	3
Regular payments & slot meter	4
Regular payments & other	5
Slot meter & other	6
Regular payments slot meter & other	7

To all households

Ask all spenders

49 Do (any of) you have a video recorder in your (part of this) accommodation?

Yes → 1 Ask (a)
 No → X - Go to 50

1 or blank	A141
------------	------

(a) Do you rent it?

Yes → Y - Ask (f)
 No → X - Go to 50

(f) Do you pay for the video recorder by regular payments to a rental company or by some other method?

Regular payments → 1 Ask (ii)-(iii)
 Other method → 2 Specify on left and go to 50

Specify

1-2	A142
-----	------

(ii) How much did you pay last time? _____

Last Video rent payment	254 P
-------------------------	-------

(iii) How long a period did this cover?

Period

Ask 50

To all households (Ask hoh or wife)

50 Is there a telephone installed in your (part of this) accommodation?

Exclude disconnected telephones.

Yes No 1 Ask (a)-(c)
X - Go to 51

(a) How much was the last account/advice you paid to the Post Office including any installation charge you may have paid?
If no account submitted or if account is less than minimum quarterly rental charge, specify why below

£ 1

£	p	Code
1 or blank		A102

(b) How long a period did it cover?

Period

(c) Did anyone outside the household share the cost of the account?

Yes No Y - Ask (I) - (III)
X - Go to 51

(I) What was your share of the account?

Last telephone account	166 P
------------------------	-------

(II) How long a period did it cover?

Period

(Household share)

(III) Was the other part paid by a business or organisation?

Yes No Y
X

To all households **Ask all spenders**

51 In the last 12 months that is since have (any of) you bought any of the following licences?

INDIVIDUAL PROMPT

TV licence?

If yes to any, enter total fees for each type of licence

No Yes

X Y

Driving licences?

X Y

Any other licences such as marriage dog HGV PSV gun etc?

X Y

Specify

FEES FOR -		
TV licence		181 8
DRIVING LICENCES		186 8
Other licences		185 8

Specify type on left and ask 52

To all households (Ask hoh or wife)

52 In this accommodation do you have

Include items owned, rented, supplied by employer or available for continuous use

INDIVIDUAL PROMPT

		No	Yes	1 or blank	Code
a washing machine?	X	(1)			A108
a fridge-freezer (that is a deep freeze with its own door combined with a refrigerator also with its own door?)	X	(1)			A164
a separate refrigerator?	X	(1)			A165
a separate deep freeze?	X	(1)			A186
Full or partial central heating by					
electricity? Include storage heaters	X	(1)			A150
gas?	X	(1)			A151
solid fuel?	X	(1)			A153
oil?	X	(1)			A152
DK fuel?		(1)			A154

If yes ask (a)

To all with oil central heating

DNA → N - Ask 53

(a) Have you purchased any oil for the central heating in the last 12 months?

Yes → Y - Ask (i)

No → X - Go to 53

(i) What was the total expenditure on oil in the last 12 months?

Cost of Central Heating Oil	017 8
-----------------------------	-------

DK → 0 - Ask 53

See (a)

To all households (Ask hoh or wife)

53 What type of fuel do you mainly use for room heating in winter?

MULTICODE IF NECESSARY

Coal?	→	(1)
Coke?	→	(2)
Specify Brand		
Electricity (incl. oil-filled radiators)?	→	(3)
Gas/Calor gas?	→	(4)
Oil or paraffin?	→	(5)
Other Specify?	→	(6)
DK	→	(7)

Specify brand if known on left

Specify left

Main fuel used for room heating (Type of fuel by coding)

1-36	A116
------	------

Ask 54 56

To all households (Ask hoh or wife)

54 Do you have gas electricity or both supplied to your (part of this) accommodation?

Gas only ———→ 5 Ask (a)
 Electricity only ———→ 6
 Both ———→ 7 Ask (a) for gas and then for electricity
 Neither ———→ 8 Go to 82

£	p	Code
5-8		
		A103

(a) Do you pay for your gas/electricity by

Running Prompt

Slot meter*
 Account
 Board Budgeting scheme
 Or by some other method?

Specify

N Ireland only
 C O C D

Code all that apply

Gas	Elec
1	1
2	2
3	3
4	4
	5

Ask 55
 Go to 56
 Go to 57
 Specify on left and go to 56

*Include meter owned by landlord, but exclude meter with own key

1-4		A128
1-5		A130

To those paying by slot meter (coded 1 at 54(a))

55 In the last 12 months that is since have you received a rebate for gas/electricity?

Yes ———→ Ask (a) and (b) for Y - gas then electricity
 No ———→ X - Go to 82

(a) How much was the last rebate before any deductions for hire purchase or credit purchase?

Gas ———→ Gas meter rebate 173 P
 Electricity ———→ Electricity meter rebate 178 P

(b) How long a period did this cover?

Period Gas ———→
 Period Electricity ———→

Go to 82

To those paying by account or some other method (coded 2 or 4 at 54(a))
(Ask hoh or wife)

56 How much did you pay for gas/electricity in your last account?

Include units consumed, standing charge, meter rent and installation

Exclude: rent of appliances
hire purchase, loans and regular maintenance

Gas

Electricity

I	P	Code
Last Acc paid	GAS	170 P
Last Acc paid	ELECTRICITY	175 P

Go to 60

To those paying by board budgeting scheme (coded 3 at 54(a))
(Ask hoh or wife)

57 How much was your last payment under this scheme?

Gas

Electricity

Board Budget	GAS	221 P
Board Budget	Electricity	222 P

58 How long a period did this cover?

Period Gas

Period Electricity

59 How much was the charge for gas/electricity in your last account/advice?

Include units consumed, standing charge, meter rent and installation

Exclude: rent of appliances, hire purchase, loans, regular maintenance charges

Gas

Electricity

Board Budget	Last GAS Acc	223 P
Board Budget	Last Elec Acc	224 P

Ask 60

To all paying by account or some other method (coded 2 or 4 at 54(a))
To all paying by board budgeting scheme (coded 3 at 54(a))

60 Was the last account/advice for a quarter or some other period?

Gas	Quarter	6	Electricity	Quarter	6
	Other	P		Other	P
	Specify			Specify	

Ask 61

61 What was the date of your last account/advice (as shown on the acc/adv)?

Gas -	Month	Year	Electricity -	Month	Year
		DK 0			DK 0

Date of last GAS Acc	A138
Date of last Elec Acc	A139

Code below then Ask 62

Interviewer to code whether documents.	<u>Gas</u>	Specify documents	<u>Electricity</u>	Specify documents
	Seen by interviewer	1	Seen by interviewer	1
	Consulted by informant	2	Consulted by informant	2
	Not consulted	3	Not consulted	3

To all households

Ask all spenders

Use separate column for each vehicle			
Per No	Per No	Per No	Per No
Person numbers		1-2 digits	
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
X	X	X	X
£	£	£	£
O	O	O	O
C	C	C	C
N	N	N	N
1	1	1	1
2	2	2	2
3	3	3	3
N	N	N	N
Y	Y	Y	Y
X	X	X	X
1	1	1	1
2	2	2	2

62 Do (any of) you at present own or have the continuous use of a

Running prompt

- Car
- Van
- Motor cycle
- Moped
- Other motor vehicle specify?
- None of these

Ask (a)-(f)

- Go to 64

(a) How much have you paid in vehicle licence(s) (Road Fund Tax) during the last 12 months for the (type of vehicle)

(b) How long a period(s) did the amount(s) cover (eg year six months)?

(c) When was the vehicle licence last renewed by you?

(d) How much have you paid in vehicle insurance during the last 12 months for the (type of vehicle)

(e) How long a period(s) did the amount(s) cover (eg year 3 months calendar month)?

(f) Do you own the (type of vehicle) or do you have continuous use of it?

- Owens
- Continuous use

- See 63

See (g)

To all who have continuous use of car

DNA Others (owned cars all vans motorcycles mopeds etc)

(g) Is the car provided* for your continuous use by

*Exclude cars purchased wholly or partly from employer

Running Prompt

- your employer
- spouses employer
- other specify?

Entered on page 1 (A285) of B Schedule

- See 63

Ask 63

To all with cars

DNA Others (vans motorcycles mopeds etc)

63 Does an employer provide* you with any petrol for private motoring** in this car?

*Provide = pay for supply free or refund expenditure

**Include in private motoring travel to and from normal place of work

- Yes
- No

- Go to 64

- Ask (i)

- Go to 64

(i) Does the employer provide some or all of the petrol expenditure for your private motoring?

- Some
- All

Entered on page 1 (A286) of B Schedule

Ask 64

all households

Ask all spenders

84 (Apart from the vehicles already mentioned) at any time during the last 12 months that is since have (any of) you owned or had the continuous use of a

Running prompt

Use separate column for each vehicle			
Per No	Per No	Per No	Per No
Person number	1-2 digits		
Car	1	1	1
Van	2	2	2
Motor cycle	3	3	3
Moped	4	4	4
Other motor vehicle specify?			
None of these	X	X	X
(a) How much have you paid in vehicle licence(s) (Road Fund Tax) during the last 12 months for the (type of vehicle)?	£	£	£
(b) How long a period(s) did the amount(s) cover (eg year six months)?			
(c) When was the vehicle licence last renewed by you?			
(d) How much have you paid in vehicle insurance during the last 12 months for the (type of vehicle)?	£	£	£
(e) How long a period(s) did the amount(s) cover (eg year 3 months calendar month)?			
(f) Did you own the (type of vehicle) or did you have continuous use of it?			
Owned	O	O	O
Continuous use	C	C	C

Ask (a)-(f)

See 65

Ask 65

	£	p	Code
Total cars and vans currently owned or used			A124
Total cars currently owned or used			A160
Total motor cycles or mopeds currently owned or used			A162
			187 8
TOTAL ROAD TAX			187 8
TOTAL NET VEHICLE INSURANCE			188 8
			188 8
(Special definition) TOTAL CARS CURRENTLY OWNED			A149
Amount of Road Tax paid on currently owned cars/vans before abatement			246 8
Number of cars/vans currently owned			A143

To all who own or have owned a vehicle during the last 12 months (coded 0 at 62(f) or 64(f))

65 During the last 12 months did you buy outright that is with cash or loan from a friend or relative (any of) the vehicle(s) you have mentioned?

Include bank overdrafts

Exclude Loan from organisation, bank, finance house or h p (enter at 69, 70)

Per No Specify type of vehicle

If more than one vehicle ask all relevant questions and note details on left for each additional vehicle

(a) Was it new or secondhand?

New → W
Secondhand → S

(b) When was the vehicle acquired?

Date (Month) / (Year)

COST of NEW CARS & VANS		244	8
COST of SECOND HAND CARS & VANS		245	8
COST of NEW and SECOND HAND motorcycles & mopeds		247	8

OUTRIGHT PURCHASES

(c) What was the total cash price of the vehicle?

£

(d) Was Road Fund Tax/Vehicle insurance included in the cash price?

Yes → Y - Ask (f)
No → X - Ask (e)

(f) How much was included for

Road fund tax? £
Vehicle Insurance? £

COST of NEW CARS & VANS		183	8
COST of SECOND HAND CARS & VANS		182	8
Number of New cars & vans bought		A	117
Number of Second hand cars & vans bought		A	118

CREDIT PURCHASES IN LAST 12 MONTHS
OUTRIGHT Ask 66 AND CREDIT PURCHASES IN LAST 12 MONTHS

66 In the last 12 months that is since have you sold any vehicles belonging to you (excluding the trade-in/ part-exchange you mentioned earlier)

Yes → Y - Ask (a) and (b)
No → X - Go to 67

If more than one vehicle ask all relevant questions and note details on left for each additional vehicle

Per no Type of vehicle

(a) When did you sell the vehicle?

Date (month) / (year)

(b) Did you receive payment by cash cheque or giro?

Yes → Y - Ask (i)
No → X - Ask 67

(i) How much did you receive?

Total cash received from the selling of any vehicles	172	8
--	-----	---

Ask 67

To all households

Ask all spenders

67 Have you received any refund(s) of vehicle licence during the last 12 months?

Yes → Y - Ask (a)
No → X - Go to 68

(a) How much was (were) the refund(s)?

£	p	Code
179	8	

Handwritten: Road Tax refund (Excl. Bus/mot)

Ask 68

68 Do (any of) you hold a current weekly or season ticket for any form of transport for which you yourself paid including any you have bought for a child?

Yes → Enter details Y - In grid below
No → X - Go to 69

Per no	Mode of transport	Period	£	p	Code
	FOR RAIL ONLY (EXCLUDE LONDON REGIONAL TRANSPORT)	ENTER } 219			P
	FOR MIXED RAIL/TUBE/BUS (INCL LONDON REGIONAL TRANSPORT (RAIL & TUBE, RAIL & BUS, TUBE & BUS))	ENTER } 255			P
	FOR ALL OTHER SEASON TICKETS (eg. TUBE ONLY OR BUS ONLY)	ENTER } 199			P

Ask 69

Applicable codes to be entered

Where season ticket is for combined modes of transport, specify modes, eg bus/tube, bus/rail etc

Exclude payments for railcards, school bus or train passes (see 82) and O.A.P. concessionary fare passes (see 84 on income schedule)

To all households

Ask all spenders

Enter per no

Use separate column for each arrangement

		Person numbers 1-2 digits							
		No	Yes	Yes	Yes	Yes	Yes	Yes	
69 Are (any of) you at present making regular payments to any of the following Individual Prompt a bank for a personal loan (that is a loan given originally for specific goods or services)? a finance house? an organisation granting a second mortgage? your employer as repayments of a loan? (include repayments deducted from salary)		X	1	1	1	1	1	1	1
70 Are (any of) you at present paying instalments under a hire purchase or credit sale agreement?		X	4	4	4	4	4	4	
71 Are (any of) you at present paying instalments to any of the following		No	Yes	Yes	Yes	Yes	Yes	Yes	
A budget or option account at a shop or store? (Exclude bank budget accounts)		X	6	6	6	6	6	6	
Any other shop running a club?		X	8	8	8	8	8	8	
A Mail Order club as an agent or through a friend or relative?		X	9	9	9	9	9	9	
Any other Mail Order organisation?		X	10	10	10	10	10	10	
A Check Trader? Exclude loans, h.p. and credit sale		X	12	12	12	12	12	12	
Other person or organisation? Specify		X	13	13	13	13	13	13	
Exclude credit card arrangements									
72 Do (any of) you at present have a credit card such as Access American Express Barclaycard Diners Club Trustcard etc?		X	14	14	14	14	14	14	
73 Have you made a down payment on anything on which you have not yet paid an instalment?		Yes	Y	Y	Y	Y	Y	Y	
		No	X						

Ask 70

Ask 71

ALPHA CODES
A TO T6

C

E

Ask 72
F

G

J

K

Ask 73

Reprompt 69-71 for type of arrangement

Interviewer note

Check back to 69 to see if 74 applies
 Check back to 70 to see if 75 applies
 Check back to 71 to see if 76 applies
 Check back to 72 to see if 8835C to be left with informant

PUNCHERS - DO NOT PUNCH

To fill with instalments coded 1 - 3 or 7 at 69

Suggest consulting agreement or payments card before asking 74

		Use separate column for each item/service							
Person Number									
Code from 69									
74(a)	How much was the loan? Exclude interest	£		£		£		£	
(b)	How much was your last repayment on the loan?	£		£		£		£	
	Office use	/							
(c)	How long a period did this cover?	Month Year		Month Year		Month Year		Month Year	
(d)	When did you obtain the loan? If more than 3 months before interview go to (e)-(j) If less than 3 months before interview ask (l)-(lll) then (e)-(j)	Month Year		Month Year		Month Year		Month Year	
(l)	How many repayments did you originally agree to pay?								
	Office use	A101							
(ll)	How much was the originally agreed repayment?	£		£		£		£	
	Office use	243							
(lll)	How often did you originally agree to make each payment?								
(e)	What items or services did you obtain with the loan? Use separate column for each item/service								
(f)	Was the item new or second hand?	Now S/hand DNA	W S N	W S N	W S N	W S N	W S N	W S N	W S N
(g)	What is the type of firm from which the item or service was obtained?								
(h)	How much was the cash price of (the goods or service)? Include Down payment Part exchange	£		£		£		£	
	Office use	239							
(i)	How much was allowed in part exchange?	£		£		£		£	
	Office use	241 6							
(j)	How much if anything did you have to put down in addition to the amount borrowed? (exclude part exchange)	£		£		£		£	
	Office use	242 6							

	Loan details	Specify documents
Interviewer to code whether documents	Seen by interviewer	1
	Consulted by informant	2
	Not consulted	3

To all with instalments coded 4 at 70

Area	Ser	Mid	Card type 3
Reference Number			Punch fresh card for each column

Ref no

Suggest consulting agreement or payments card before asking 75

		Use separate column for each item/service							
Person Number	Code from 70								
		Person No (2 dig)							
		Code from 2 69-70 1-4							
75(a) What (items or services) did you obtain under the hire purchase/credit sale agreement?		Item/service							
(b) What is the type of firm from which the item or service was obtained?									
(c) Did you buy it new or second hand?		New S/Hand DNA		W S N		W S N		W S N	
(d) How much was the cash price of (the item/service)?		£		£		£		£	
Exclude interest		Office use		Cash price					
Include Down payment				239 1		239 1		239 1	
Part exchange									
(e) How much was the last instalment you actually paid?		£		£		£		£	
		Office use		D book item code f					
(f) How long a period did this instalment cover?		Month Year		Month Year		Month Year		Month Year	
(g) When did you obtain the item or service?									
If obtained within last 3 months ask (h)-(l)									
(h) How much was allowed in part exchange?		Amount allowed in part exchange		£		£		£	
		Office use		241 6		241 6		241 6	
(i) How much was the down payment (excluding part exchange allowed)?		Down payment (exc part exchange)		£		£		£	
		Office use		242 6		242 6		242 6	
(j) How many instalments did you originally agree to pay?		No of agreed instalments		A101		A101		A101	
(k) How much was the original (agreed) instalment?		Original agreed instalment		£		£		£	
		Office use		243		243		243	
(l) How often did you originally agree to pay each instalment?									

	Credit details	Specify documents
Interviewer to code whether documents	Seen by interviewer	1
	Consulted by informant	2
	Not consulted	3

Punchers See page 28 over

To all with arrangements coded 6, 8-10, 12 or 13 at 71

Area	Ser	Hid	Card type 3
Reference number			

Use separate column for each arrangement

Enter person number	Person No 1-2 digits			
Code from 71	Code from Q 71			
76 (a) What is the name of the firm to which your payments are made (through an agent)?				
(b) How much was your last payment?	£	£	£	£
(c) How long a period did this payment cover?				
(d) Have you obtained any goods during the last month ie since (the date exactly a calendar month before interview) from (name of firm)?				
Yes	Y	Y	Y	Y
No	X	X	X	X

If "Yes", complete box below using a separate line for each item obtained If "No" ask 77

Per No	Code from 71	Description of goods obtained Itemise as far as possible If clothing state whether for adult or child Give sex If child give age	Date obtained		Cash price		Office use
			Day	Month	£	p	
		<p>If acquired within one month of interview, code item from j book item codes and alpha codes at Q. 71</p>					<p>ITEM CODES</p> <p>ALPHA CODES C - K</p>

Punchers See credit card page

To all households

Ask all spenders

77 Do you have any

Prompt: All current and bank budget accounts at high street banks and National (Post Office) Giro

current accounts? → Y } Ask (a) for each account
 bank budget accounts? → Y }
 no to both? → X - Go to 78

(a) Have you paid any bank service charges on any of these accounts in the last 12 months?

Yes → Y - Ask (i) and (ii)
 No → X - Go to 78

(i) How much were your bank service charges excluding interest, from all accounts in the last 12 months that is since ?

Include	Per No	£	1
all	Per No	£	1
accounts	Per No	£	1

(ii) Was any part of this amount for business purposes?

Yes → Y - Ask (ai)
 No → X - Ask 78

(ai) About what proportion would be for business?

Per No	%
Per No	%
Per No	%

Total domestic bank charges 180.8

Ask 78

78 Apart from any of the items I have already asked you about do (any of) you pay for anything by standing order or direct debit through a bank bank budget account National (Post Office) Giro or building society?

Yes → Y - Record details in grid below
 No → X - Go to 79

Exclude credit transfers

Payments by STANDING ORDER

Per 10	Purpose (Automobile Association membership etc)	Period covered by payment	
	AA/RAE	270	↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↓ ↓ ↓ ↓
	SPORTS CLUBS	271	
	TRADE UNIONS	273	
	PERIODICALS	274	
	OTHER SUBS	275	
	SAVINGS	276	
	GIFTS	278	
	CHARITY	279	
	OTHER FUEL OIL (EXCL CENTRAL HEATING OIL)	280	
	MAINTENANCE CHARGES		

Ask 79

To all with children at state schools

DNA No state school children

81 Have any of your children at state schools had any school meals during the past 7 days ending yesterday?

Yes

No

N - Go to 83

Y - Ask(a)-(c)

X - Go to 82

(a) How many meals has each child had?

(b) Were the meals free?

Yes

No

(c) During the last seven days did you pay for any of the meals?

Yes

No

(I) How much did you pay for each child?

(II) How many meals does this cover?

P	No	P	No	P	No
Y		Y		Y	
X		X		X	
Y		Y		Y	
X		X		X	
£	J	£	I	£	I

Go to 82

Ask (c)

Ask (I) & (II)

Go to 82

Ask 82

Include school cafeteria and fixed priced meals

Exclude school tuck shop

Amount paid for school meals in last 7 days	280 1
Amount paid for school meals in last 7 days	A196
No of free school meals in last 7 days	A197

82 Has/have your child(ren) at State school travelled to or from school by bus or train during the past 7 days ending yesterday?

Yes

No

Y - Ask (a) & (b)

X - Go to 83

(a) Did he/she travel free?

Yes

No

(b) During the past 7 days did you actually pay for any of the travel?

Yes

No

(I) How much did you pay (for each child)?

(II) How many days/weeks does this cover?

P	No	P	No	P	No
Y		Y		Y	
X		X		X	
Y		Y		Y	
X		X		X	
£	J	£	I	£	J

Go to 83

Ask (b)

Ask (I) & (II)

Go to 83

TRAVEL TO STATE SCHOOLS'

Whether paid for 1-3	A157
Amount paid for school travel in last 7 days	158 1
No of children travelling to school	A167

FREE = 1
PAID for = 2
SOME PAID, SOME FREE = 3
Ask 83

To all households

Ask all spenders

83 Have any of you (or your children under 16) received any education grants, maintenance grants or scholarships during the last 12 months that is since ?

Yes → Y - Ask (a) - (c)

Exclude parental contribution

No → X - Go to 84

	P No	P No	P No	P No	£	p	Code								
(a) Who is /was receiving the grant →															
(b) Are you (or your children) still receiving the grant or scholarship?															
Yes →	Y	Y	Y	Y											
No →	X	X	X	X											
(c) Is/was the source of the grant															
State? →	1	1	1	1			Ask (d)								
Private? →	2	2	2	2			Ask (e)								
Overseas? →	3	3	3	3											
(d) What is/was the current annual value of the grant excluding fees? →	£	£	£	£			Ask (f) - (h) if grant still being received. Others go to 84								
(e) What is/was the current annual value of the grant including fees? →	£	£	£	£											
(f) How much of this was/is being/will be paid direct to you (or your children) by cash or cheque? →	£	£	£	£			<u>IN LAST 12 MONTHS</u> <table border="1"> <tr> <th colspan="2">EDUCATION GRANT</th> </tr> <tr> <td>TOTAL VALUE OF STATE GRANT</td> <td>210 8</td> </tr> <tr> <td>TOTAL VALUE OF PRIVATE OR OVERSEAS GRANT</td> <td>209 8</td> </tr> <tr> <td>TOTAL AMOUNT RECEIVED IN CASH</td> <td>207 8</td> </tr> </table>	EDUCATION GRANT		TOTAL VALUE OF STATE GRANT	210 8	TOTAL VALUE OF PRIVATE OR OVERSEAS GRANT	209 8	TOTAL AMOUNT RECEIVED IN CASH	207 8
EDUCATION GRANT															
TOTAL VALUE OF STATE GRANT	210 8														
TOTAL VALUE OF PRIVATE OR OVERSEAS GRANT	209 8														
TOTAL AMOUNT RECEIVED IN CASH	207 8														
(g) Is the grant for attendance at a state or private establishment?															
State? →	1	1	1	1											
Private? →	2	2	2	2											
(h) Is the course you (or your children) are attending															
Up to and including A level →	1	1	1	1											
Above A level →	2	2	2	2											
DK →	3	3	3	3											
(i) What is the name of the examination you (or your children) will take? →							Ask 84								

1. Households

Ask all spenders

84 In the last 12 months that is since _____ have (any of) you paid any of the following for yourself or your children in this household?

Include parental contribution

If child aged 16 or over and currently living away from home and receiving full- or part-time education, enter details at 87 81

(a) Have you paid any fees or maintenance for any educational courses at any level but excluding leisure classes?

Yes _____ Y - Ask (i)-(vi)
No _____ X - Go to (b)

	P No	P No	P No	P No
(i) Who is/was attending the course? _____				
(ii) What was the annual amount paid? _____	£	£	£	£
(iii) Is/was the course at a state or private establishment?				
State _____	1	1	1	1
Private _____	2	2	2	2
(iv) Is/was the course you (or your children) are/were attending				
Up to and including 'A' level _____	1	1	1	1
above 'A' level _____	2	2	2	2
DK? _____	3	3	3	3
(v) What is the name of the examination you (or your children) will take?				
(vi) Are you (or your children) currently attending the course?				
Yes _____	Y	Y	Y	Y
No _____	X	X	X	X

£	p	Code
FEEES PAID IN LAST 12 MONTHS		
Educational course fees paid in last 12 months		160 8
1-7		A193

State	1
Private	2
Individual	3
State and Private	4
State and Individual	5
Private and Individual	6
State, Private and Individual	7

(b) Have you paid any fees for any (other) course or private tuition such as nursery school play school driving swimming music riding lessons weekend or evening courses or other leisure classes? Exclude membership fees, playgroup, day nursery

Yes _____ Y - Ask (i)-(v)
No _____ X - Go to 85

	P No	P No	P No	P No
(i) Who is/was attending the course? _____				
(ii) What is the total amount paid in the last 12 months? _____	£	£	£	£
(iii) Is/was the course				
At a state establishment?	1	1	1	1
At a private establishment?	2	2	2	2
or an individual giving private tuition? _____	3	3	3	3
(iv) What is the subject being studied? _____				
(v) Are you (or your children) currently attending the course?				
Yes _____	Y	Y	Y	Y
No _____	X	X	X	X

£	p	Code
OTHER COURSE FEEES PAID IN LAST 12 MONTHS		
		162 8
1-7		A195

Information also transferred to page 36

To all households Ask all spenders

85 (In addition to the courses you have told me about) are you at present attending any part-time courses at a state educational establishment for which you do not pay fees?

Yes → Ask (a)-(c)
 No → Go to 86

- (a) Who is attending the course?
- (b) Is the course up to and including
 - A level →
 - above A level →
 - DK →
- (c) What is the name of the examination you will take? →

P No	P No	P No	P No
1	1	1	1
2	2	2	2
3	3	3	3

(Information transferred to grid on page 36 for hand tabulation)

Ask 86

To all households with a member aged 14-18 who is coded 4 (state secondary) or 9 (non-advanced further education up to 'A' level) at Q 8

DNA Others → Go to 87

86 Is the course you (or your children) are attending part of the technical and vocational educational initiative?

- Yes
- No
- DK

P No	P No	P No	P No
1	1	1	1
2	2	2	2
3	3	3	3

(Information transferred to grid on page 36 for hand tabulation)

Ask 87

Ask all spenders

Educational income and expenditure for non household members

Area	Ser	Hid
Reference number		

Ref no

87 Have you a child aged 16 to 24 outside this household who is currently receiving full or part-time education?	Yes							Y - Ask (a)-(f)
	No							X - Go to 83
(a) Ring person number	31		32		33			
(b) Enter relationship to HOH								
(c) Sex	M	F	M	F	M	F		
(d) Age								
(e) Full or part-time education	F/T	P/T	DK	F/T	P/T	DK		
(f) Enter person number of parent/guardian answering Yes to 83	Details for hand tabulation						Ask 88	
88 Has your child received any education grants maintenance grants or scholarships during the last 12 months, that is since Exclude parental contribution	Yes	Y	Y	Y	Y	Y	Ask (a)&(b)	
	No	X	X	X	X	X	Go to 92	
(a) Is your child still receiving the grant or scholarship?	Yes	Y	Y	Y	Y	Y		
	No	X	X	X	X	X		
(b) Is/was the source of the grant	State?	1	1	1	1	1	Ask (c)	
	Private?	2	2	2	2	2	Go to (d)	
	Overseas?	3	3	3	3	3		
(c) What is/was the current annual value of the grant excluding fees?	£		£		£		Go to 89	
(d) What was the current annual value of the grant including fees?	£		£		£		Ask 89	
89 Is your child attending a	Prompt University	1	1	1	1	1		
	another state establishment	2	2	2	2	2		
	or private establishment?	3	3	3	3	3	Ask 90	
90 Is the course	up to and including A level	1	1	1	1	1		
	or above A level?	2	2	2	2	2		
	DK	3	3	3	3	3	Ask 91	
91 What is the name of the examination your child will take?							Ask 92	

Ask all spenders

Ring person number from 87(a)

92 In the last 12 months that is since have you paid any of the following for the child you have just mentioned

Include parental contribution

(a) fees or maintenance for any educational courses at any level but excluding leisure classes?

Yes
No

(i) What was the annual amount paid?

(ii) Was the course at a state or private establishment?

State
Private

	31	32	33
<i>Details for hand tabulation</i>			
Yes	Y	Y	Y
No	X	X	X
(i) £			
(ii) State	1	1	1
Private	2	2	2

Ask (i) and (ii)
Go to 93

Ask 93

DETAILS TRANSFERRED FROM PAGES 33 & 34

OFFICE USE

Pers No

Q84(a)
Code for (ii) & (iv) if (vi) is Yes

Amount at 84(a)(ii)

Q 84(b)
Code for (iii) if (v) is Yes

Amount at 84(b)(ii)

Q85
Code at (b)

Q 86
Code at question

The following information to be coded from observation If in doubt ask H O H or wife

93 Type of accommodation occupied by this household:

- Whole house detached _____ → 1
 - " semi-detached _____ → 2
 - Whole bungalow detached _____ → 3
 - " semi-detached _____ → 4
 - Whole house/bungalow terraced or end terraced _____ → 5
 - Purpose built flat or maisonette in block with lift _____ → 6
 - " without lift _____ → 7
 - Part of house/converted flat or maisonette/rooms in house - with lift _____ → 8
 - " without lift _____ → 9
 - Dwelling with business premises _____ → 10
 - Mobile home/caravan/houseboat _____ → 11
 - Any other _____ → 12
- Specify

1
2
3
4
5
6
7
8
9
10
11
12

Go to 95

Go to 94

Go to 95

Specify on left and go to 95

E	P	Code
<i>Type of accommodation</i>		
1-12	A	123
<i>Total fees</i>		
from Q 92	164	8

To those coded 6-10 at Q 93

DNA Others (coded 1-5 11&12)

N-Go to Q 95

94 Compare description at 97 with type of accommodation occupied by household at 93 Do they differ?

Yes _____ → Ask (a) of HOH or wife

No _____ → Go to 95

(a) Are there any rooms in the (description from 97) which this household does not occupy?

Yes _____ → Y - Ask (l)

No _____ → X - Go to 95

(l) How many rooms?

No of other rooms

Ask 95

The following information should be obtained from local authority office and entered below

95 Gross Value of rateable unit(s) covering the household → £

96 Net Rateable Value of rateable unit(s) covering the household →

97 Copy from valuation lists

Description (Flat Shop with flat house with garage etc)	Location in building

£	p	Code
NRV	00	070 8

For all households containing men aged 65 and over and women aged 60 and over

DNA

Go to 99

98 What concessionary bus travel provisions are provided for OAP-

Free bus pass or permit _____

1

Half fare bus pass or permit _____

2

Flat fare bus pass or permit _____

3

Bus tokens or bus tickets _____

4

Ask (a)

Any other type of concessionary OAP bus pass? Specify _____

5

No concessionary bus travel provision in area _____

7

If man 65+/women 60+ concessionary bus travel

1-7	A129
Annual value of token/tickets	163 8

(a) Annual value of tokens/tickets

If coded 4 or A129 →

Ask 99

To all households (Ask hoh or wife)

99 Were there any special circumstances, such as visitors staying with you or temporary absences of members of your household during the past two weeks?

Yes

No

£	p	Code

Y Specify special circumstances on left

X - Go to next document

Specify special circumstances

SELF EMPLOYED ONLY. SPECIFIED EXPENDITURES AFTER ABATMENT (SEE Q41, INCOME 30HD)	→		287 P
Whether any expenditure imputed	1 or blank		A174

Go to next document

OFFICE USE

E	P	Code
Domestic rate poundage	080	1
Water rate poundage	231	1
Annual standing charge	234	8
Sewerage rate poundage	232	1
Annual standing charge	235	8
Environmental services poundage	233	1

A Yearly domestic rate poundage for address

B Water rates for (address of household) are

collected by local authority

collected by water authority or water company

(a) Yearly water rate poundage for address
Exclude sewerage and environmental services poundages

(b) Yearly water supply standing (fixed) charge

C Yearly sewerage charge (rate poundage) for address

D Yearly sewerage standing (fixed) charge

E Yearly environmental services charge (poundage) for address

S835A

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