

SAMPLING DETAILS - 1986

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- NB
1. Sampling extension for F.E.S. Queries is 2366
  2. These notes form part of F.E.S. Interviewer Instructions.
  3. Revisions have a black line in left hand margin

## FES SAMPLING DETAILS - 1986

### THE SAMPLE

#### Conversion to PAF

Each year we call on about 11,400 addresses in Great Britain taken at monthly intervals. Until 1985 the addresses were drawn from the Electoral Register but commencing this year they are being taken from the Post Office's list of addresses: the Postcode Address File (PAF). This brings the FES in line with the other continuous surveys carried out by OPCS.

#### Effect of ineligible addresses on quota size

The PAF is the Post Office's list of addresses (or 'delivery points', as they call them) and postcodes for Great Britain. It is a good sampling frame in that it is as nearly as possible a complete list of addresses and, being held on computer tapes, it is relatively easy to use for drawing a sample. The addresses on your list have been selected at random from the 'small user' Postcode Address File, that is the file of delivery points which receive fewer than 25 articles of mail per day. By using only the small user file we hope to avoid sampling large institutions and businesses. However, some small businesses or commercial premises may be sampled and appear on your address list. Therefore you may find a slightly higher proportion of ineligible addresses than in an Electoral Register sample, particularly in quotas in city centres, where shops could be sampled (Note, however, that you must call at all the sampled addresses to check for residential accommodation). In anticipation of the higher number of ineligible addresses, the FES quotas have been increased from 16 addresses to 17 addresses.

As in the past the FES relates only to domestic households (which satisfy the conditions in sections A1 to A10 of Interviewer Instructions) which are in residence at the given address at the time of the interviewers first call.

#### Address List

An example of a PAF address list, reduced in size, is included for reference on page 2. The top two lines give general information about the quota. Working from left to right they give the following details:

##### TOP LINE

Survey Number	The survey number, name and year will be consistent throughout 1986 but, obviously, the quarter and month will change.
Survey Name	
Year Quarter	
Month	
Interviewer	The interviewer's name and number will be written in by hand in Field Branch.
Office Use	This gives HQ the date on which the address list was printed.

AREA NO: 004 POSTTOWN : NORWICH

SECTOR: NR3 1 / NORWICH NORTH EAST

REGION 05

ADD SERIAL NO	ADDRESS	POSTCODE	MO	LA	W	GRID REF
01	7 MANDELLS ROAD	NR3 1AA		19G	10	62310/30930
02	13 LOWES YARD ST GEORGES STREET	NR3 1AW		19G	10	62320/30880
03	23A CHURCH LANE	NR3 1BP	2	19G	10	62310/30910
	DIVIDED ADDRESS BOXED PART ONLY					
	*****					
	* 23A CHURCH LANE *					
	*****					
	23 CHURCH LANE					
04	14 GRANGEWOOD AVENUE	NR3 1DE		19G	10	62290/30930
05	23-25 LONG ROW	CANWICK NR3 1DY		19G	10	62300/30930
06	59 RED LION STREET	NR3 1EE		19G	10	62290/30990
	DIVIDED ADDRESS BOXED PART AND ANY PARTS NOT LISTED ON ADDRESS LIST					
	FLAT 1/59 RED LION STREET					
	FLAT 3/59 RED LION STREET					
	*****					
	* 59 RED LION STREET *					
	*****					
07	THE GATE HOUSE/ ST MARTINS ROAD	NR3 1EP		19G	11	62320/30870
08	2B PRINCETON GARDENS	NR3 1HG		19G	11	62320/30880
	DIVIDED ADDRESS BOXED PART ONLY					
	BASEMENT FLAT/2 PRINCETON GARDENS					
	*****					
	* 2B PRINCETON GARDENS *					
	*****					
	2 PRINCETON GARDENS					
09	149 BARRACK STREET	HAZEL GROVE NR3 1JD		19G	12	62310/30940
10	THE COTTAGE/BEECH ROAD	SWANLAND NR3 1PW		19G	12	62390/30950

\*\*\*\*\* LA 19G IS NORWICH

2

P2

7

## SECOND LINE

- Area Number** This consists of a 3 digit number which should be entered on all documents.
- Post Town** This shows the post town in which the addresses are located but bear in mind that this is not always the same as the geographical location. Often small towns or villages are included in the post town of the nearest large town or city.
- Sector** This shows the postcode sector in which all the addresses are located; It will consist of one or two letters and two or three digits. It is followed by the sector name. (The name has been allocated by OPCS and is not meaningful to the Post Office). All the sampled postcodes on the address list will start with the same letters and numbers as the sector printed here. A postcode is, in fact, completed by the addition of two final letters to the postcode sector. Thus, the sector may be shown as NR3 1 and the postcodes as NR3 1AA etc.
- Region Number** This is a 2-digit number indicating the Region.

## MAIN BODY OF LIST

The information in the main body of the address list is presented in 8 columns.

1. **Add Serial Number** This is the 2-digit address number (often called the serial number). It should be entered in the 'SER' box on all documents.
2. **Address** Normally this will be the full postal address. Very occasionally, the house name or number will be omitted and replaced by an asterisk. If no extra information has been written in please telephone Sampling for instructions.  
  
At some addresses on the list you will see the words "DIVIDED ADDRESS" (See page 8)
3. **Postal District** There is no heading to this column which shows the postal district of the sampled address. This information is not always given on the PAF, and therefore on many address lists it appears only intermittently. Note that entries in this column are linked only to the address on that line (eg on the example address list 'Canwick' applies only to 23-25 Long Row' and not to any other address on the list).
4. **Postcode** This column lists the postcode (up to 7 characters) for each sampled address.
5. **M.O. (Multi-Occupancy Indicator)** If an entry appears in this column it is an indication that the address may be multi-occupied, ie more than one household may be living there. The number in the column should be treated only as a rough guide to the number of households you may expect to find at the address. There is no guarantee that this number is correct, and you will still have to call at the address and identify the number of households living there. See section on MULTI-HOUSEHOLD ADDRESSES (Page 10).

6. L.A. (Local Authority) This is the Local Authority code number on the PAF and is converted into the LA name at the bottom left of the sheet. If more than one is listed you must call at each for rateable values, concessionary fares etc.
7. W (Ward) This gives a code number for the electoral ward in which each address is located (for office use only).
8. Grid Reference This gives the grid reference of the first address in the postcode shared by the sampled address. There are, on average, 17 addresses in each postcode so although the grid reference may not be the precise one for the sampled address, it will only be in an unusually widespread postcode area that the sampled address is far from the grid reference.

Most quotas, ie 17 addresses should fit onto one page of A3 size computer printout. However, if the quota contains a number of 'divided addresses' it may continue onto a second or even third page. Furthermore if the quota covers more than one postal sector the sampled addresses in each sector will be printed on a separate page.

If you have any difficulty in interpreting the computer listing or in finding an address (after following the recommended procedure) please telephone Sampling for further information (Ext 2366). Make sure you have the address to hand when telephoning!

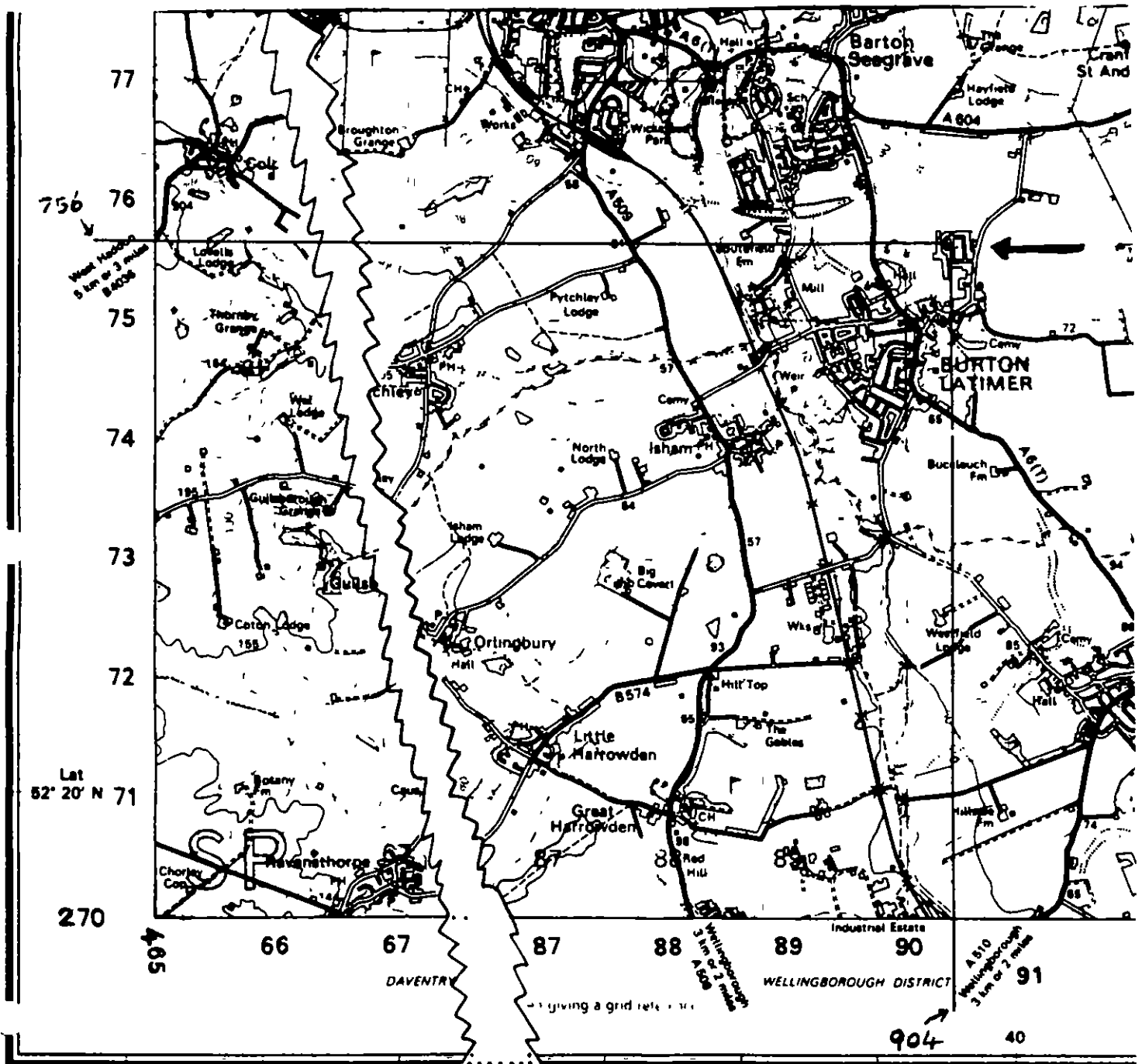
#### Using grid references on PAF samples

All PAF addresses have an Ordnance Survey grid reference attached to them. This is printed out on your address list. They are useful in planning your work in rural areas, particularly as addresses do not always fall in the Post-town given on the address list.

A word of caution - not all the grid references will be completely accurate. There may be occasional errors in them and since the reference is for the first address in the post-code containing the sampled address, rather than the specific sampled address, it is a guide to the locality of your sampled address rather than an accurate location. However, we understand that 90% of addresses are within 400 metres of the grid referenced address.

Grid references may still leave you unable to find some rural addresses and they are not as useful in urban areas where a street map would be more useful. If you still have problems locating an address, please refer to the section "Addresses difficult to find", page 6.

You need an Ordnance Survey map of your area, which is fairly large-scale - 1 : 50,000 or 1 : 63,000 are best.



The sampled address is, 30 Woodland Drive, Burton Latimer and the grid reference is given as two sets of five digit numbers - 49040/27560.

You should ignore the first and last digits of each number (4 and 0, 2 and 0)

The first set of three digits (904) gives the reference along the bottom of the map (Easting). The second set of three digits (756) gives the reference up the side of the map (Northing).

EASTING:- the numbers 90 4 indicate that the address is 4/10 of the distance between reference points 90 and 91.

NORTHING:- the numbers 75 6 indicate that the address is 6/10 of the distance between reference points 75 and 76.

### Addresses difficult to find

The PAF address list does not supply names of occupiers of each address. Names from the Electoral Register sample were often used in rural areas to help locate obscure addresses. We want you to make the best use of your time in trying to locate vague or obscure addresses. Experience has shown that the most effective methods of locating difficult addresses are:

1. Asking local people including the postman
2. Phoning local Post Code Enquiries (Tel No in Blue Postcode book).
3. Phoning local Sorting Office (before 11 am)
4. Asking at local Post Office
5. Asking police

If after consulting maps, visiting the area and enquiring locally you still cannot locate an address, there are two alternatives:

1. Telephone Sampling 2366 who may be able to provide extra information either from the PAF or from the Electoral Register.
2. Check the address on the Electoral Register, to obtain a surname, yourself. Copies are usually held at libraries and some post offices.

You should decide which is cheaper. Obviously if locating an odd address in the Electoral Register involves a long journey, parking expenses etc, it would be better to telephone HQ. If, however, you have several obscure addresses and there is a copy of the Electoral Register locally, it would probably be cheaper for you to check this yourself. Please note this is only permissible when all other methods have been exhausted and it should only be necessary in a very small number of cases in rural areas. Make a note of any such calls on your claims form. Some Sub Post Offices have a copy of the Electoral Register to hand and may be willing to help you.

### Blue Postcode Books

You may also find it useful to obtain local postcode books. Local Post Offices, in theory, can supply these free on request, so it should be possible to collect one when you call to post work etc. If you have any problems with this, we will supply an introductory letter for you to hand in at the Post Office. Don't make a special journey to collect a Blue Book!

### Counting Households at Address

At each address you should try to find out how many households are present at your first call. If the address contains more than one household you should list all the households according to the procedure described on page 11.

The total number of households you have listed should be the total number at the address.

### Address Empty at First Call

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.

ADDRESS LABELS

In addition to your addresss lists you will be given a set of sticky labels - one for each address in your quota.

You should stick the labels in your notebook which will save you copying out the address by hand.

All the information given on the label will also appear on your address list but in a different format.

An example of the label you will be given is shown below.

00359/03	MO 4
244 LONDON ROAD	
HADLEIGH	*****
BENFLEET	WARNING
SS7 2DE	DIVIDED
	ADDRESS
	*****
HADLEIGH	/ WD11
CASTLE POINT CD	/GR58110/18690

Details shown on label

LEFT HAND COLUMN

- 00359/03 - Area No, and Address Serial No
- 244 London Road - Address
- Hadleigh - Postal District
- Benfleet - Post Town
- SS7 2DE - Postcode
- Hadleigh - Sector name (allocated by OPCS)
- Castlepoint CD - Local authority name



RIGHT HAND COLUMN

- MO 4 - Multi-occupancy indicator. This will appear only if the figure in the M.O. column on your address list is 3 or more
- \*\*\*\*\*  
WARNING - This will appear only if the address is, in fact, a  
DIVIDED 'Divided Address'  
ADDRESS  
\*\*\*\*\*
- WD 11 - Ward code
- GR58110/18690 - Grid reference of the first address in the postcode shared by the sampled address.

NON-DIVIDED AND DIVIDED ADDRESSES

Most addresses are listed only once on your address list; these are non-divided addresses. (See address serial nos. 01, 02, 04, 05, 07, 09 and 10 on your example address list). A few addresses have more than one part listed on the PAF; these are divided addresses. (See address serial nos 03, 06 and 08 on your example address list). However, the PAF is not necessarily complete so one or more parts of the address may not be listed. This can happen both at non-divided addresses and divided addresses. For example, at a divided address the PAF may show a gap in a sequence of numbers (eg in a block of 5 flats where only flats 1, 3 and 4 are listed) or there may be a part with an alpha suffix that is not listed (eg '69 Main Street' and '69B Main Street' are listed but '69A Main Street' is not).

Clearly we wish to ensure that those parts of an address that are not listed on the PAF are given a chance of selection, but we also want to ensure that those parts that appear on the PAF do not get a further chance of selection. This is the purpose of the 'DIVIDED ADDRESS' procedure.

1. Non-divided addresses

In most cases there will be only one household at the address which you should attempt to interview. However, there are two exceptions:

- (i) You may find more than one household at the address on the address list. As in previous years you should list all such households on the form provided and follow the appropriate multi-household procedure to determine which household(s) to interview. In England & Wales you should always use the Concealed Multi-household procedure. In Scotland you should use the Concealed Multi-household procedure unless the address has a Multi-occupancy indicator of 3 or more in which case the Pre-sampled Multi-household procedure should be used.
- (ii) You may find a separate flat or building with the same number as the address on your address list but which is not listed on your address list. For example when you go to '7 Mandells Road' (see address serial No 01 on your example address list) you find:-

'Upper flat, 7 Mandells Road' and  
'7A Mandells Road'

Then, in these cases, you should telephone Sampling for further instructions.

NB (ii) ABOVE IS A CHANGE FROM THE PROCEDURE BRIEFED RECENTLY

2. Divided addresses

There are two types of 'Divided Address' procedure:

- i. BOXED PART AND ANY PARTS NOT LISTED ON ADDRESS LIST  
(See address serial no. 06 on your example address list).
- ii. BOXED PART ONLY  
(See address serial nos 03 and 08 on your example address list)

Please be careful to follow the instructions for each procedure as given below.

1. Boxed part and any parts not listed on address list

Check first to see if there are any unlisted parts at the address. For example, if you find a Flat 2, Flat 4 and a Flat 5 at 59 Red Lion Street as well (see address serial no 06). You should list the household(s) at '59 Red Lion Street' and the household(s) at the three flats (Flats 2, 4 and 5) which were not listed on your address list. Then follow the appropriate multi-household procedure to determine which households should be interviewed.

If there are no unlisted parts of the address then you should attempt to interview the household at the address in the boxed part. If you find more than one household at the address in the boxed part you should follow the appropriate multi-household procedure.

ii. Boxed part only

Here you should not check to see if there are any unlisted parts at the address. Where there is only one household at the address in the boxed part, interview that household. If you find more than one household at the address in the boxed part you should follow the appropriate multi-household procedure.

If there are any queries please contact Sandy Stefan (ext 2347).

## MULTI-HOUSEHOLD ADDRESSES

Most sampled addresses will contain just one household, but sometimes you may come across a multi-household address. This may occur, for example, when the sampled address is divided into flats which are not separately listed on the PAF. About 2% of all addresses are multi-occupied but the proportion will be higher in Scotland and large cities.

The PAF identifies some probable multi-household or multi-occupied addresses; these are indicated on the address list in the column headed 'M.O'. (Multi-occupancy indicator). However, not all multi-household addresses can be identified in this way as some addresses may contain more than one household even though the M.O. column is blank. Also the M.O. indicator may differ from the actual number of households at the address.

## ENGLAND AND WALES

In England and Wales you should use the CONCEALED MULTI-HOUSEHOLD procedure (see page 11) for ALL multi-household addresses you find whether the M.O. column is blank or not. (Interviewers who have worked on the survey in previous years should note that this is a departure from the procedure used in the past).

## SCOTLAND

In Scotland however you should use the PRE-SAMPLED MULTI-HOUSEHOLD procedure (see page 15) at all addresses with an M.O. indicator of 3 or more, and the CONCEALED MULTI-HOUSEHOLD procedure (see page 11) for all other multi-household addresses you find.

CONCEALED MULTI-HOUSEHOLD PROCEDURE  
(ENGLAND, WALES AND SCOTLAND)

You should familiarise yourself with the procedure before visiting any addresses as there may not be any indication on your address list (ie the M.O. column may be blank) that an address is multi-occupied.

In this case you should take the top sheet off your pad of pink CONCEALED MULTI-HOUSEHOLD SELECTION SHEETS (see example on page 13). On the front of the sheet insert the serial number of the address concerned and after talking to a responsible adult at the address 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 is a block 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 or a converted house, you should list the flats in a systematic way, starting with the first on the left on the lowest floor and working in a clockwise manner on each floor.

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

If the address on your address list is marked as a 'DIVIDED ADDRESS', you should list households only at those parts as instructed on your address list. ie 'BOXED PART ONLY' or 'BOXED PART AND ANY PARTS NOT LISTED ON ADDRESS LIST'.

On the back of the sheet 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. (These numbers are not the household numbers that you will eventually use on your schedules.

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 Outcome for the first completed household at that serial number and return it to the office.

Extra Households per address and quota

ENGLAND AND WALES ONLY (FOR SCOTLAND SEE PAGE 20)

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

For practical reasons (ie to prevent a quota of addresses containing a lot of multi-households from becoming unmanageable in the field), there is a ceiling of 21 on the number of households/addresses to be dealt with.

In counting these 21 you should include all addresses already reported on your Weekly Progress Return (S836H) (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 21 any addresses returnable as 2 (no sample selected at address), since

over the whole sample they would in theory, counterbalance the extra households selected at multi-household addresses.

So in any one quota no more than four extra households should be chosen from 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, ie you should take the first household that your Concealed Multi-Household Selection sheet instructs you to interview.

#### Interviewers arrangements

When 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.

#### Queries

If you have any problems in applying these multi-household procedures, please ring Sampling for advice (Ext 2366).

(FOR USE IN ENGLAND, WALES AND SCOTLAND)

CONCEALED MULTI-HOUSEHOLDSELECTION SHEET

Area	1	0	6
Ser. No		1	2

List of Households

H/hld No.	DESCRIPTION OF HOUSEHOLDS eg. Location and Surnames 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	1 <sup>st</sup> floor / 2 <sup>nd</sup> 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 - Ext 2366Procedure

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

EXAMPLE

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	4,6,10
21	7,14,19
22	1,17,20

2. PRE-SAMPLED MULTI-HOUSEHOLD PROCEDURE

(SCOTLAND ONLY)

Any address with a multi-occupancy (M.O.) indicator of 3 or more is treated as a pre-sampled multi-household address. However we cannot pre-select the households for you at these addresses because, flats in tenement blocks are not often listed separately on the PAF. Usually only the house number and street name are given. Therefore at each address with an M.O. indicator of 3 or more we are asking you to sample one rateable unit using the valuation lists held at the Rating Office. You should visit the Rating Office to obtain the required information before calling on any of these addresses.

For each pre-sampled multi-household address you will be issued with two forms:

- i. A blue 'RATEABLE UNIT SELECTION SHEET' for the selection of rateable units (see page 17)
- ii. A white 'PRE-SAMPLED MULTI-HOUSEHOLD SELECTION SHEET' for the selection of households (see page 21). You will need to use the sheet only if the number of rateable units at the address is too small for one to be selected.

The Area Number and the Address Serial No for that address will be entered in the boxes provided at the top of both the blue and white sheets. It is essential that you use the correct sheets for each pre-sampled multi-household address so that households are given their correct chance of selection.

A. Rateable Unit Selection Procedure

(SCOTLAND ONLY)

On the valuation lists each rateable unit at an address is listed separately and is described as 'house', 'apartment house' or 'service flat'.

Example:

Entries on valuation list:

House	Gordon	Gr 1
House	Kane	Gr 2
House	McKendrick	1/1
Service flat	Haydon	1/2

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 blue Rateable Unit Selection Sheet. (See example page 17). 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(s) that will be selected.



On the back of the blue sheet is a selection table with 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.

In the example (see serial number 06) four rateable units were found. Referring to the selection table we see that rateable unit number 1 has been chosen so you should interview the household occupying the 'house' at Gr 1 (Ground Floor 1). Ring the number of the rateable unit selected in this case number 1, in the left-hand column on the front of the blue sheet.

You might find that the number of rateable units is too small for one to be selected. In this case an instruction printed on the blue sheet will tell you:

- either
- i. to visit the address and carry out the usual pre-sampled multi-household procedure (see Household Selection procedure on page 19).
- or
- ii. to 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.

If the address is a non-divided address and the valuation list shows that it has more than one part (ie rateable unit) you should list the rateable units at the address on the Rateable Unit Selection Sheet as usual. (This will avoid having to make a further visit to the Rating Office) then telephone Sampling to check whether any of these rateable units are already listed on the PAF.

#### Special Cases

- a. If the address on your address list is marked 'DIVIDED ADDRESS', you should list rateable units only at those parts as instructed on your address list, ie 'BOXED PART ONLY' or 'BOXED PART AND ANY PARTS NOT LISTED ON ADDRESS LIST.'
- b. 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, workshops) should be excluded from your listing.

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

- c. 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 within a pre-sampled multi-household address. In this case you should follow the procedure described on page 11.

(FOR USE IN SCOTLAND ONLY)

RATEABLE UNIT SELECTION SHEET

Area	1	7	2
Ser. No		0	6

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

Rateable unit no.	Entries on Rating List	OUTCOME CODE Transfer from C&C/C&O sheet
①	House Gordon Gr 1	9
2	House Kane Gr 2	
3	House McKeandrick 1/1	
4	Service Flat Haydon 1/2	
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		

IF MORE THAN 22 RATEABLE UNITS,  
CONTINUE ON SAMPLING SHEET

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

Rateable Unit Selection Table

MULTI OCCUPANCY (MO) INDICATOR = 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

Procedure

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

If more than 19 rateable units are found, telephone Sampling - Ext 2366.

B HOUSEHOLD SELECTION PROCEDURE  
[SCOTLAND ONLY]

You will need to carry out this procedure only if the number of rateable units you have listed on the blue sheet is too small for one to be selected and the instructions on the blue sheet tell you to visit the address (see page 16). After talking to a responsible adult at the address, list all the households living there at your first call.

The households should be listed on the front of the white 'PRE-SAMPLED MULTI-HOUSEHOLD SELECTION SHEET' using the listing procedure described on page 11 (see example on page 21).

On the back of the white sheet is a selection table with a range of numbers corresponding to the number of households you may have found. Against each number in the range is the number of the household(s) at which you are to interview.

In the example (see serial number 05) three households were found. Referring to the selection table we see that household number 2 has been chosen so you should interview the household occupying the flat on the first floor, left hand side. Ring the number of the household selected, in this case number 2, in the left hand column on the front of the white sheet. (This number is not the household number you will be using on your schedules).

If there was only one household at serial number 05, no interview would be required and you would simply return an Interviewer Record and Record of Calls and Outcome for serial number 05, coding outcome - 'No sample selected at the address'.

If there were eight households at this serial number you would have to interview two households, numbers 1 and 4 on your list.

However it is rare for you to be instructed to complete no interviews at an address, or more than one interview. 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

- a. If the address on your address list is marked as a 'DIVIDED ADDRESS', you should list households only at those parts as instructed on your address list. ie 'BOXED PART ONLY' or 'BOXED PART AND ANY PARTS NOT LISTED ON ADDRESS LIST'.

- b. Selected flat is empty or ineligible: As far as you can, you should avoid including empty accommodation on your list, but 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 required.

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

- c. Selected flat 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 on page 11.

#### Returning Scottish Selection Sheets

Please return all blue and white selection 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 Households per address and quota

##### SCOTLAND ONLY

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

For practical reasons (ie to prevent a quota of addresses containing a lot of multi-households from becoming unmanageable in the field), there is a ceiling of 21 on the number of households/addresses to be dealt with.

In counting these 21 you should include all addresses already reported on your Weekly Progress Return (S836H) (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 21 any addresses returnable as 2 (no sample selected at address), since over the whole sample they would in theory, counterbalance the extra households selected at multi-household addresses.

So, in any one quota no more than four extra households should be chosen whether they come from concealed or pre-sampled 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.

- i. at concealed multi-household addresses you should take the first household that your Concealed Multi-household Selection Sheet instructs you to interview.
- ii. 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 you should take only the first.

#### Interview arrangements

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.

#### Queries

If you have any problems in applying these multi-household procedures please ring Sampling for advice (Ext 2366).

(FOR USE IN SCOTLAND ONLY)

PRE-SAMPLED MULTI-HOUSEHOLDSELECTION SHEET

Area	1	5	6
Ser. No		0	5

List of Households

H/hld No.	DESCRIPTION OF HOUSEHOLDS eg. Location and Surnames if available	OUTCOME CODE  Transfer from C&C/C&O sheet
1	<i>Ground floor</i>	
(2)	<i>1st floor, left hand side</i>	9
3	<i>1st floor, right hand side</i>	
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		

IF MORE THAN 22 HOUSEHOLDS,  
CONTINUE ON SEPARATE SHEETProcedure

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

SELECTION TABLE (B)

MULTI OCCUPANCY (MO) INDICATOR = 5

NUMBER OF H/HLDS FOUND AT THAT ADDRESS	INTERVIEW AT HOUSEHOLDS NUMBERED
1	NO INTERVIEW
2	1
3	2
4	4
5	3
6	2
7	4
8	1, 4,
9	3, 8
10	2, 9
11	5, 9
12	7, 10
13	7, 9, 11
14	4, 9, 11
15	7, 9, 11
16	8, 10, 12
17	2, 4, 9
18	8, 14, 16
19	1, 4, 8
20	5, 8, 13

If the number of households found is more than 20 please telephone Sampling for instructions: (Ext 2366).

## FAMILY EXPENDITURE SURVEY 1986

## COLLECTION, EXAMINATION AND PROCESSING OF INFORMATION

## 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 1986 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, e.g. 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.

2. Fieldwork for the survey in Great Britain is carried out by interviewers of the Social Survey Division of the Office of Population Censuses and Surveys, and in Northern Ireland the interviewing is undertaken by the Policy, Planning and Research Unit of the Department of Finance & Personnel. 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, i.e. 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 and 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 (for the 1986 survey using the SIR database management system). The system provides for conversion where necessary of recorded amounts of expenditure and income to a standard period of one week. It also provides for the calculation of composite information for each household, e.g. 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.

IMPORTANT NOTE concerning CHANGES in the PROCESSING of the FES between 1985 and 1986 and notification of changes to the sampling frame and sample design.

A. PROCESSING

1 The annual survey has been in existence since 1957 (with an earlier large scale survey in 1953/54) and was one of the first Department of Employment (DE) systems to be computerised in the early 1960s. For the surveys from 1969 to 1985 a computer system dating from 1968 was used. In 1984 a decision was taken to develop a new computer system for the FES to replace the life-expired 1968 system. The package chosen for the new system was 'SIR'.

2 SIR offered the opportunity of capturing and validating the data as well as providing a database, a retrieval system and linkages to other statistical and analysis packages, all in a single system.

THE FORMAT AND SIZE OF THE DATABASES

3 There will be a database for each year's survey. The 1986 survey is the first to be processed by SIR, but, in addition, SIR databases have been set up for the surveys for the years 1983, 1984 and 1985 by converting data from the earlier PLAN/COBOL system. There is also a 1982 SIR FES database from the pilot system. To permit reliable analyses at a regional level selected items will be carried into two-year databases. The first such two-year database will be for 1985-86.

4 Under the database system, data are taken on, validated, and passed to a working database on which weekly equivalents are calculated, credibility checks carried out, and errors corrected. (See Appendix 1 for a schematic representation of the FES processing system). At the end of each quarter "derived" data (such as total household expenditure, personal disposable income, and the household composition codes) are produced and added to the database which is then split into

(a) the 'raw' database - containing every item keyed from the questionnaires

(b) the 'DE derived' database - containing only the raw and derived data needed by the DE for its own analyses.

5 The working database is not retained. Other users (mainly other Government Departments) of the FES can either take the 'raw' database and convert it into whatever derived form they need for their own purposes, or use the 'DE derived' database, or they may decide to take both.

6 In 1986 each quarter's working database was about 60 megabytes in size, with the full year 'raw' database amounting to 120 megabytes, the annual 'DE derived' database to 60 megabytes and the 'two-year' database to 40 megabytes. In summary the 3 user databases can be sized as follows:

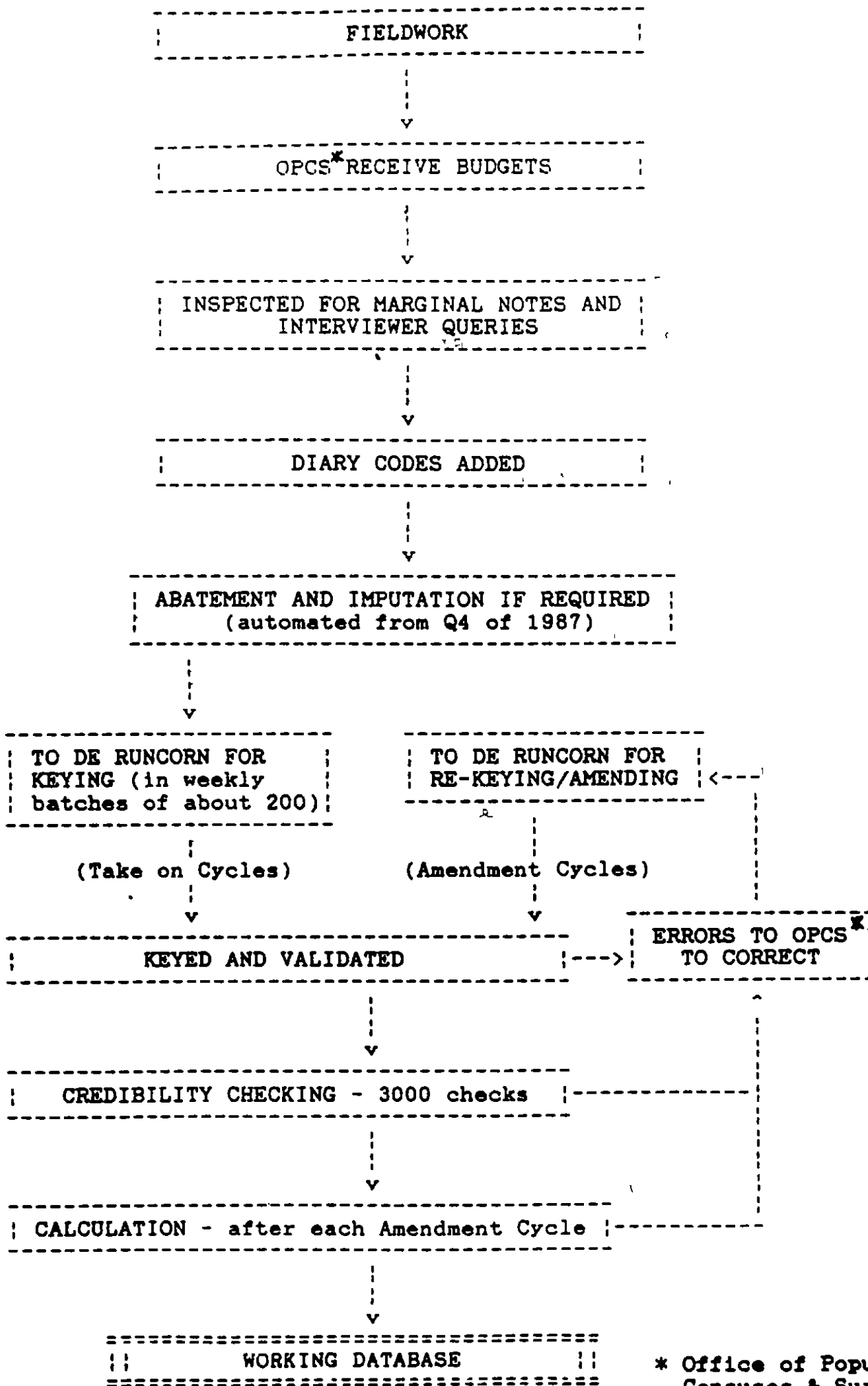
	1986 Databases		
	Raw	Derived	2-year
Size	120mb	60mb	40mb
Record Types	43	45	27
Variables	3114	888	436

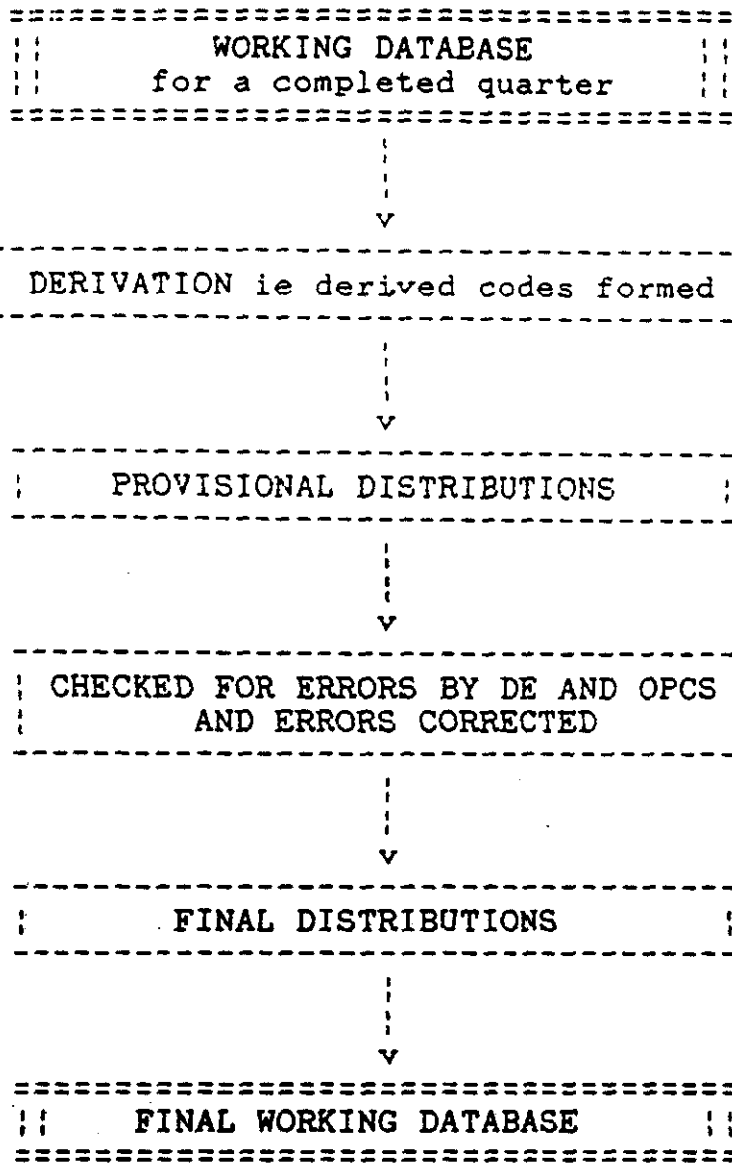
7 Clearly the above changes will have consequences for recipients of non-aggregated (source) FES data. This information pack cannot answer all the questions or solve all the problems that might arise as a result of the changeover to the new system. This pack should therefore be regarded as providing a link between the "old" and the "new" systems and being, to some extent, transitional. (Users are invited to complete the comments form at item 10 of the pack and return it to the DE in due course). However, it includes a selection of "in-house" documentation which should go a long way towards providing an adequate understanding of the origins and end-products of the data provided by the FES.

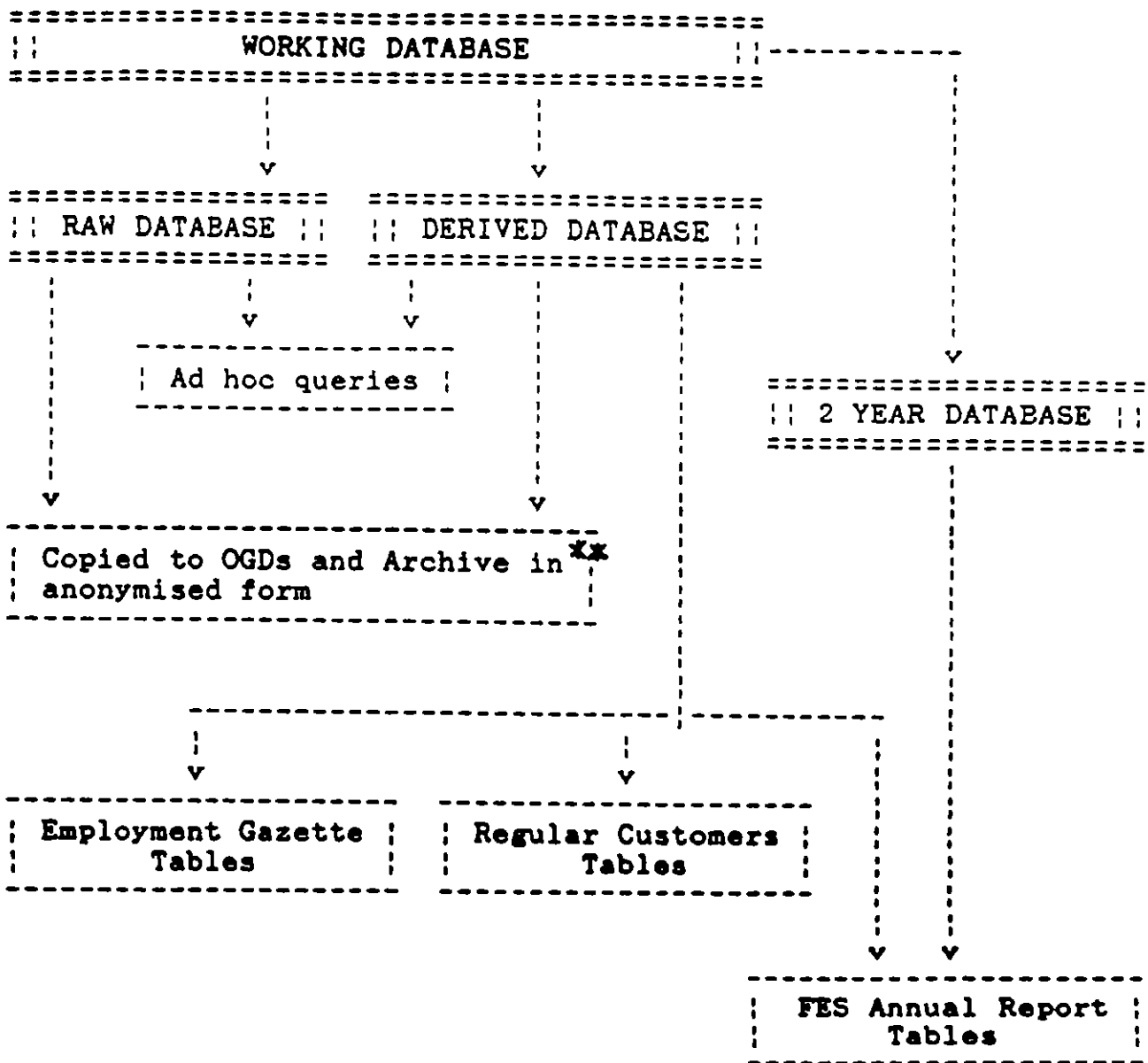
8 Since there were so many changes in codes between 1985 and 1986 the usual "list of changes of codes" has been replaced by the document "Comparison of Codes 1985 - 1986". Users will need to take into account the large number of code changes when first embarking on using the 1986 FES.

#### B. SAMPLING FRAME AND SAMPLE DESIGN

9 In 1986 the Postcode Address File (PAF) was used for the first time as the sampling frame in place of the Parliamentary Electoral Register. At the same time the sample design was changed to give a less clustered sample. A brief summary of the changes to the sampling frame and sample design is given in the Introduction to the 1986 FES report (paragraphs 11-14) at item 2 of this pack. See also FES Sampling Details at item 5a.







**\*\* Other Government Departments and the Economic and Social Research Council's Data Archive**

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 18 and 19 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).

(vi) Some FES data are subject to under-recording and non-response bias (see FES Report, Introduction, paras 21 and 23 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 Labour Force 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 87, 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 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 sampling and 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).



OPCS

OFFICE OF POPULATION CENSUSES AND SURVEYS

SOCIAL SURVEY DIVISION

Family Expenditure Survey

INSTRUCTIONS TO INTERVIEWERS

1986

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Sampling instructions are contained in a separate book entitled 'SAMPLING DETAILS'  
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NB: A line to the left of page indicates a change to instructions for 1986

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.

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**Useful Points to Get over to the Public**

 1.2
 

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- 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).
- ii. 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).

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Sections 3.2 - A1-A10 are concerned with definitions related to households, individuals and changes within households etc.

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Excluded Addresses and Households

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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/Commercial 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 addresses 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.

---

SPACING OF PLACING CALLS OVER THE FIELDWORK PERIOD

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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:-

<u>Placing Week</u>	<u>All months except February</u>	<u>February</u>
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

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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, page 93 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.

**PROCEDURE WITH EACH CO-OPERATING HOUSEHOLD**

5.1

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 A3, page 28).
- b. how many eligible people there are aged 16 and over within each household. (FES 'spender' defined para A5, page 29).

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.

- 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.
- 

Starting record keeping

5.4

---

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.

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Before the first checking call:

5.5

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- 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.

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 (S836C) 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 obtain.

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

IN 1986 THE FES SAMPLE WILL BE DRAWN FROM THE POST CODE ADDRESS FILE (PAF). SURNAMES ARE NOT GIVEN ON PAF AND THEREFORE YOU WILL HAVE TO ASK FOR DETAILS OF

SURNAME(S) - SEE (b). YOU MUST ASK YOUR INFORMANT FOR THIS INFORMATION AND ENTER IT CORRECTLY ON THE APPROPRIATE E FORM (See page 93). Addresses given on the postcode address file are often incomplete. 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.

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The purpose Leaflet

5.8

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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. You may also leave an 'Ask the People' leaflet, supplies of which are available on your general non-survey stationery orders.

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Payments to co-operating household members (16+)

5.9

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£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. (ie no questions refused).
- b. Keeping records for 14 days, and
- c. Completing S836C 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. THIS MUST BE RETURNED AS A REFUSAL EVEN IF THE TWO WEEKS DIARIES ARE COMPLETE, AND INFORMANTS MUST BE TOLD THAT THE PAYMENT OF £5 WILL 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.

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.

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

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.

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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.

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### Layout and signposting

6.2

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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:
1. Plain type for questions and answer codes,
  11. Bold type for question numbers, instructions, notes, signposting and important points within questions.
- b. As far as possible, signposts are located to the right of the punching columns.
1. Whenever there is no signpost next to a code, go on to the next question.
  11. 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.
  111. 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).
  - 1v. 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.

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### Wording of questions

6.3

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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

Q55 '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

- b. Boxes under questions where precise wording is not used, eg. the Box under Q. 47 on Household Schedule.

Example

Per No paying	Item No	Purpose of policy	Insurance company	OFF USE	Enter period code	If Code 9 specify period	£	p
1	1	Animal sickness	Animal welfare		8		30	00
1	2	Sickness	Union Friendly Society		9	4 c/mths	80	00

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.

The design of schedules has been changed for 1986 to meet the requirements of a new data processing system.

The schedules should be completed in the following way.

1. Leading zeros are required for dates, reference number, person number. This is now standard SSD procedure as presented in Interviewers Handbook.
2. Reference number, date of interview, enter in boxes provided.
3. Amounts of money, specific details eg age, relationship to HOH, should be entered on dotted line inside or outside coding boxes as indicated.
4. In 1986 INTERVIEWERS ARE ASKED TO CODE PERIODS DIRECTLY INTO CODING BOXES.

This can be done in two ways, either by entering code in box provided or by ringing preprinted period code. The codes to be entered are shown in 'Period Code' box i.e.



PERIOD CODE -								
Week	-	1	Four weeks	-	4	Six months	-	7
Two weeks	-	2	Cal Month	-	5	Year	-	8
Three weeks	-	3	Three months	-	6	Other period	-	9

Period code boxes are to be found at foot of schedule pages.

If the period is not covered by the codes in 'Period Code Box' or in the coding column, then enter code '9' or ring code '9' as appropriate and specify period in box provided.

5. Apart from recording data (money or specification of an item) and periods you should record answers by ringing codes.
6. Several questions have an 'Item Number' code at the top of a column or near the beginning of a line. This should be ringed for each line or column used. (see 6.3).
7. At some questions (eg Q61, household schedule) you must account for each spender in the household. That means that for each spender there must be an item coded or a 'None of these' coded.
8. Some questions (eg Q72, income schedule) need a code ringed above a box and then an amount of money entered immediately below in a box

EXAMPLE

3	
200	00

9. Provision is made at several questions for a 'DK' code. In these cases a '1' should be ringed. If a DK answer is given at a question without this provision then write 'DK' beside coding column.
10. Where an estimate is given write 'E' beside answer but outside coding column.
11. Initials should not be used at all on schedules eg NFU should be written as National Farmers Union.
12. Prompt cards are to be used on the Household schedule at Qs 93-95 and on the Income schedule at Qs 19, 23, 44-55, 58-67, 69, 71, 73-77 and 89.
13. If a particular case does not seem to be dealt with on the schedule or in the following notes on individual questions, record full details in clear handwriting at the appropriate place on the schedules. It is useful to check over these notes when you check the schedules at home to ensure that the note is clear.

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.

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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 and one (Q15) asked of HOH only.

For definitions of H.O.H. and spender see Section A3-A7 below.

Where informants have recently moved or the household is newly formed bills for current accommodation may not be available (See A10 below).

---

### Households - Special cases for inclusion

A1

- a. Households which will be moving should be included in the survey provided either
1. the households will be living at the selected address for at least three weeks from the first contact,
  11. 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

A2

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

A3

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:-

1. 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

A4

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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 A3.

---

Spender Definition

A5

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. someone who is senile or otherwise mentally incapable of contributing to the survey (NB 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.

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

A7

---

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

(1) 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 78 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 78 on the Income Schedule.
- iii. Also note on the Income Schedule at Q 78 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'

A8

- 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 must be completed, as far as is practicable, (see para (c) page 58).
- 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 77. (EXCEPT WHERE THE NON-HOUSEHOLD MEMBER IS A SPOUSE OF A HOUSEHOLD MEMBER, IN WHICH CASE ALLOWANCE SHOULD BE ENTERED AT Q 78).

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

A9

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 38 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 38 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 38 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 38 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.

f. Death of a spender

- 1. 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.
- 11. 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

A10

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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.



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) beside the date of interview box.

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 boxes eg 4 May 1986. should be entered as 

0	4	0	5	8	6
---	---	---	---	---	---

Restarting Records

FRONT PAGE

If the household failed to start or keep up records but are still willing they should be restarted. Remember to recheck A & B schedules as they might have paid gas/elect/rates or other bills since the original interview, or have had a pay day, investment interest etc... Note the date the A & B were rechecked as this becomes the new date of interview and diaries should begin immediately after.

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 two zeros are to be inserted in the household box as in the following example:

Area	Ser	Hld							
<table border="1"><tr><td>4</td><td>9</td><td>9</td></tr></table>	4	9	9	<table border="1"><tr><td>0</td><td>1</td></tr></table>	0	1	<table border="1"><tr><td>0</td><td>0</td></tr></table>	0	0
4	9	9							
0	1								
0	0								

For addresses containing 2 or more households number the first 01, the second 02, etc. ie leading zeros required.

Person no/relationship to HOH

ITEM 1/2

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.

Note change for 1986. 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 A3).

Code 2 applies where husband or wife is not a household member (see A3).

Codes 3 Note change for 1986. Includes not only single people of all ages but also anyone who is widowed, divorced or separated. (This ruling applies whether the separation is legal or not). Children should be coded 3.

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

## Current full-time education

ITEM 6

To be asked of all regardless of age.

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 Q83-86).

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.

Code 7 Note change for 1986. Non-advanced further education up to 'A' level. Non-advanced further education courses are those up to and including the standard of GCE 'A' level or OND/ONC. They include; BTEC, ordinary national or general certificates and diplomas (ONC/OND), SCOTVEC national certificates, City and Guilds, most RSA courses, GCE, GCSE (General Certificate of Secondary Education), CPVE (Certificate for Pre-vocational Education) and SCE (Scottish Certificate of Education).

Codes 8 and 9. Note change for 1986. Higher education

Code 8 University includes all full-time degree courses at universities.

Code 9 All other advanced further education. Advanced Further Education courses are those full-time higher education courses held outside universities at polytechnics and colleges and institutes of higher education, which are above the standard of ONC/OND or GCE 'A' level. They include; Teacher training, first and higher degrees, BTEC (Business and Technician Education Council), HNC/HND (Higher National Certificate and Diploma), SCOTVEC (Scottish Vocational Educational Council HNC/HND), Diploma in Higher Education a variety of professional courses, and all other courses above GCE 'A' level or ONC/OND.

NOTE: The key differences between codes 8 and 9 is where the higher education course is being taken. If it is being taken at a polytechnic, institute of higher education or any institution other than university and it is a higher qualification (as defined) then it should be coded 9.

NB: Apprentices are treated as working and not receiving full-time education.

---

Age at which full-time education completed

ITEM 7

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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

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Ring code 9 for 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.

---

D Records completed for both weeks

ITEM 10

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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.

---

Number of other households at address

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 number 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.

---

Number of rooms

Qs 12 & 13

---

Question 12 applies where there is only one household at the address. Enter number of rooms in first column of grid.

Question 13 applies if there is more than one household at the address. Enter number of rooms in columns as applicable.

---

Other rooms specify

Qs 12 & 13

---

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

1. 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

---

Rooms in rateable unit not yet accounted for

Q.14

---

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 Q98 is matched in full by the total number of rooms at Q12 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 for Q98 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.

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HOH: Years lived at address

Q 15

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Asked of HOH only. If less than a year record the number of months.

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Type of tenure

Q 16(a)-16(d)

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

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Rented accommodation

Q 16 (a)

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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.

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Owned accommodation

Q 16(b)

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Someone who has fully paid off their mortgage is coded 6 ie owning outright.

---

Rent free accommodation

Q 16(c) & (d)

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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 CODED AS RENT-FREE, BUT AS RENTED

---

100% Housing Benefit/Rent Rebate/Rent Allowance

Q 17

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Note change for 1986.

Note: 1. Housing Benefit is a general term covering rent rebate/allowance or rate rebate. Q17/21 deal with rent element and Q25/26 deal with rate element.

2. This question is related to Housing Benefit and can cover (in addition to rent) rates, water rates, sewerage rates, environmental rates and heating, etc.

Please note: Housing Benefit covering rates only should be entered at Q.25.

We do not ask 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 rent payable from local housing or rent office and enter at Q17(a)(i)-(ii). Enter details of rates, water rates, heating, etc at 17(a)(iii) if included in rent. See page 56.

DO NOT TRY TO OBTAIN INFORMATION FROM HOUSING BENEFIT OFFICE

If the accommodation is rented from a housing association or someone else (code 2, 3 or 4 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 DHSS 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 amount covered by housing benefit at this question but rather at Q17, 21 or 25.

---

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 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.

Under the 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 an interim period some informants will receive housing benefit in the form of Supplementary Benefit (Income Schedule Q61).

Rebates 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.

NB. The amount recorded at Q21(d) should not include rates rebate (see Q25). If rates cannot be separated make note that amount includes rates rebate.

---

Services included in rent

Q. 22

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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)

---

This question applies to all except those whose rent includes rates.

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.

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Rates rebates/Housing benefit (ASKED OF ALL HOUSEHOLDS)

Q. 25-26

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The general term Housing Benefit includes rates rebate, however, respondents may still think in terms of rates rebate: so both terms are included in question.

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).
- iv. In a twelve month period a household can receive rebate by a reduction in rates and also a lump sum.

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).

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Housing benefit supplement

Q. 27

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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

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Mains sewerage

Q. 28

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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.



---

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.

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.

---

Additional payments for accommodation

Q. 30

---

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.

---

Source of mortgage

Q. 31

---

Q. 31 applies when Q. 16(b) is coded 5 (owns with mortgage). Someone who has paid a mortgage and no longer has one outstanding on his house is coded 6 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 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

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At this question we are interested in the arrangement covered by last payment not original mortgage arrangement. 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 the 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 1 at Q. 32.

b. Interest and Capital/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 2 at Q. 32.

Any arrangement that does not fit into either a. or b. requires full notes eg. where there are two mortgages for the purchase of the accommodation, i.e. main mortgage and smaller top-up mortgage, and one is interest only and one interest and principal.

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Interest only mortgage payment

Qs. 33-35

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Note change for 1986

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 mortgage payment

Qs. 36-38

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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.

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How many years has the mortgage run/to run

Qs 39 & 40

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

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Mortgage payment, standard tax relief deducted

Q. 41

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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. Now tax relief can be obtained by a reduction in mortgage payments. With interest only mortgages the interest payment will have been reduced by the current standard (or basic) tax rate (30% at time of writing). Where interest and principal payments have been made the reduction will have been on the interest element only.

---

Additions to mortgage in last payment

Q. 42

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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.

Structural insurance can also be included in a mortgage payment.

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

Q. 43(c)

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Note that provision (43(c)) is made for combined structural and contents insurance.

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Insurance on personal possessions

Q. 45

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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.

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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.

Please specify purpose of policy, eg. do not write "life policy" if it is an endowment.

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 Society policies for sickness, etc Friendly Society life and endowment policies go at Q46.

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.

---

**Your (part of this) accommodation**

Q's 48-54 etc

Starting with Q. 48 the phrase 'your (part of this) accommodation' is used. This phrase appears at questions 49 and 53. 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/Video recorders/Home computers and TV games**

Q48

From 1986 this question has been expanded to include video recorders.

A SEPARATE COLUMN SHOULD BE USED FOR EACH TV, VIDEO RECORDER, HOME COMPUTER OR TV GAME.

**TV sets**

Where a TV set is broken, it should be accepted as a TV set in the informants part of 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.'

Video recorders

Exclude video cameras.

Combined TV and Video rental

If the individual rentals cannot be separated then enter combined amount under TV and note that it includes video rental.

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.

TV games

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

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.

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TV Slot meters

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

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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).

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Telephone account payment

Q. 49

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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.49(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.

---

TV Licence

Q. 50

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Note that from 1986 this is the only licence for which information is wanted on the Household schedule.

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.

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.

Note change of format for 1986

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 normally follow the 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. Accounts based on board estimates should also be included.

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 for electricity applies only to Northern Ireland.

---

Rebate for gas/electricity - slot meter

Q. 54

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Enter the total amount of rebate at Q. 54(a). Where the household has HP commitments which are paid from the meter rebate, make certain that the amount at Q54(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 69-72.

---

Amount shown on account

Q. 55

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It is the cost shown on the account which should be entered at Q55 ie the actual cost of fuel and standing charge during the period of the account plus meter rent and installation.

If last account was a credit ENTER LAST ACTUAL PAYMENT OF MONEY.

The period covered should be shown at Q59.

NOTE SIGNPOSTING TO Q59.

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Board budgeting scheme - agreed payments

Q. 56-58

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At Q's 56 and 57 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. 58

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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.59

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Period of account/ advice

Q. 59

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This question applies to Board Budgeting Schemes (Q.58) AND account payments (Q. 55).

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

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"

---

NB There must be an entry for every spender in the household even if they are all 'none of these.'

Ask Q.61 (a) - (f) for vehicles currently owned or made use of. Ask Q. 63(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 Q65 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.

Q61 (g). This question only applies to cars for continuous use. Do not include cars purchased from employer.

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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.



---

Vehicles purchased

Q. 64

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Asked of all who have owned a vehicle in last 12 months (Q61 or 63)

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.69-72.

Check that vehicles mentioned at this question are accounted for at Q 61 or 63.

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Vehicles sold

Q. 65

---

Asked of all who have owned a vehicle in last 12 months (Q61 or 63)

This question applies to all vehicles sold for cash.

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

Check that vehicles mentioned at this question are accounted for at Q63.

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Refunds of vehicle licence

Q. 66

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

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Season ticket

Q. 67

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

All modes of transport covered by the ticket should be recorded eg train/bus.

EXCLUDE passes that enable informant to obtain reduced fares on buses or trains etc. These ARE NOT season tickets.

---

Credit cards

Q. 68

---

Note change for 1986.

This question should be coded Yes ... 1 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 S836C.

Code 1 on front page of diaries for each spender with a credit card.

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

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Acquisitions by credit

Q. 69-75

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These questions cover acquisitions by different forms of credit.

Qs. 69-72 are designed to establish the different forms of credit being used.

Q. 73 is concerned with details of credit purchases for agreements coded 1-4 at Q. 69

Q. 74 is concerned with details of credit purchases for agreements coded 1 at Q.70.

Q. 75 is concerned with details of credit purchase for agreements coded 1-6 at 71

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

- i. When recording details of repayments, always ask to see loan documents or repayments card. This is particularly important at Q's 73 and 74.
- ii. A single code only should be ringed in each column of Q. 69-72 combined.

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Bank, finance house direct (code 1 or 2)

Q. 69

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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:

- i. overdrafts - these should not be shown at Q. 69 at all (if used to purchase car see Q. 64 otherwise ignore).
- ii. 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

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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 4)

Q. 69

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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 1)

Q. 70

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

---

Budget or option account (code 1)

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 Shop.

---

Shop running a club (code 2)

Q. 71

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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 3) (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.

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 Q81).

An HP or credit sale agreement arranged by a mail order firm should be coded 1 at Q70.

---

Other mail order organisations direct (code 4)

Q. 71

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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 5)

Q. 71

---

HP agreements with a check trader should be coded 1 at Q.70.

Loan agreements with a check trader should be coded 2 at Q69.

---

Other schemes (code 6)

Q. 71

---

Other credit arrangements should be described fully.

Include loans from relatives and friends.

Do not include arrangements with trade unions or social clubs etc, whereby goods are bought at reduced prices. These are not credit arrangements.

---

Newly-acquired credit agreements

Q. 72

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If the answer to Q.72 is Yes, ring code Y in the next blank column on page. When recording details at Q. 69-71 for this new agreement, they should be entered in the next blank column after the column just coded Y.

If there is no new agreement, code No .....X.

---

Credit agreements coded 1-4 at Q 69 and 1 at 70

Q. 73 & 74

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Q. 73 is concerned with loans coded 1-4 at Q 69 and Q 74 is concerned with hire purchase and credit sale coded 1 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 73(e) and 74(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. It is essential that all money borrowed is accounted for even if only as a cash residue.

---

Credit agreements coded 1-6 at Q.71

Q. 75

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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.

---

Bank charges

Q. 76

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THIS QUESTION IS NOT CONCERNED WITH DEPOSIT ACCOUNTS, ETC WHICH ARE SAVINGS ACCOUNTS AND DEALT WITH ON THE INCOME SCHEDULE. (Q.71)

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. 75.

---

Standing orders and direct debits

Q. 77

---

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. 68 and instructions on credit card account payments sheet (S836C).

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Prescriptions - items acquired free of charge

Q. 78

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Enter 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.

Note change for 1986

a. Liquid Welfare Milk (Q79)

The individual receiving the milk should be entered in the person number box.

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 (Q80)

The individual receiving the milk should be entered in person number box.

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(d)(i) 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 67 (season tickets).

Note that at 82(c)(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.

Q85. This question is to be asked of all spenders.

Q86. 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 89 EXCLUDE parental contribution towards making up a grant to full amount set.

At Q's 84 and 88 INCLUDE parental contribution towards making up a grant to full amount set.

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.

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'A' schedule expenditure refunded by employer (prompt card 'A' ) Q.93

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This question was previously on the Income Schedule

It will be necessary to refer back to earlier 'A' schedule amounts when promoting.

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Money received for items of regular household expenditure Q.94  
(prompt card 'B')

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This question was previously on income schedule.

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.95.



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

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Q.95

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 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.61 Income Schedule).

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Visits to local authority office

Qs. 17, 96-99

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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. Q96-98
2. Details on O.A.P. concessionary bus fares Q99.

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 full name, position and address of the person who can give authority for information to be released and pass this immediately to Mr R Redpath or Mr T Kenney at HO along with sampled address details

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Rateable values and description

Q. 96-98

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It is essential that rateable value at Q. 96 and Q. 97 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 Qs. 12, 13 & 14).

This information obtained from the Local Authority office should be coded on all 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 38 should be completed and details of special circumstances recorded.

SECTION INDEX

Income schedule introduction..... 46  
Income schedule Q1-Q89..... 43-63

NOTE THAT FOR 1986 THE LAYOUT PROVIDES FOR UP TO THREE SPENDERS TO BE RECORDED ON EACH SCHEDULE

- 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 Qs.88 & 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 as far as possible for absent members of the household (See A7) 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.38-41 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 or third spender is entered on an Income Schedule he or she must be the one with the next Person Number, irrespective of the order of the interview. There must be no gap between the 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, P2 and P4 1st schedule  
Or P1 and P2 1st schedule  
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, P2 and P3 1st schedule  
P4 on 2nd schedule  
or each spender on a separate schedule

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

Please ensure that person numbers in the form of double digit numbers (eg 01, 02, 03) are entered at the top of each column.

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## B Schedule Questions

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Detailed points on questions are as follows

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### Employment Status

Q.1

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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. ie. he is an employee of his company.

Occupation therapy. Informants who work at a therapy centre etc for physically or mentally handicapped should not be coded as employees. They should be coded as 4, 5 or 7 depending on degree of sickness, etc. The benefit from the centre should be entered at Q.77 and treated as allowance from an organisation.

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 81 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

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 unemployed<sup>o</sup> regarding

1. Where last job was as an employee\*
  - a. Unemployed for 13 weeks or less.  
Ask Q4, 4(a), 9-31.
  - b. Unemployed for more than 13 weeks but less than 52 weeks.  
Ask Q4, 4(a), 9-16, 21-27.

- c. Unemployed for 52 weeks or more.  
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), 38-44 as appropriate.
- b. Unemployed for more than 13 weeks but less than 52 weeks.  
Ask Q4, 4(a), 9, 9(a), 9(b) 38-43 as appropriate.
- c. Unemployed for more than 52 weeks.  
Ask Q4, 9, 9(a), 9(b), 38-43 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.

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Permanently sick or injured (code 5)

Q. 1(b)

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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.

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Retired (code 6)

Q. 1(b)

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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.



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None of these (code 7)

Q.1 (b)

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"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).

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Paid work in last 12 months

Q.2

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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 87.

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

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Away from work

Q.3

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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

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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 87.

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

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Retirement in last twelve months

Q.5

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Note change for 1986

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

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Informants unable to work etc

Q.6-8

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

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Looking after sick or aged relative

Q.6

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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).

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Permanently unable to work

Q.7

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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

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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 87 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.

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Most remunerative and subsidiary employment

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

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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. If, on probing at this question, it is found that Q1(a) has been wrongly coded, ensure that Q1(a) is recoded.

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.

Ensure that if informant is a director then Code 1 has been ringed.

---

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.

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Last pay details

Q's.10-16

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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 be total gross pay before any deductions.

Maternity pay: if last pay was Maternity Pay this should be ignored and last full pay entered. See Q.64 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 3/5/85. They state that they were last paid on 19/4/85 ie over two weeks before interview. The reason given for this is, that when last paid on 19/4/84 they were paid three weeks money to cover their holiday period and therefore they were not paid on 26/4/85 or 3/5/85.

---

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.53).

---

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

---

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.

---

NI Contributions

Q.15

---

Note that from 1986 you should code '1' if there was no deduction from wage for National Insurance. You should also ask new question 15(a).

---

Other deductions from wage/salary

Q. 16

---

**NOTE CHANGE FOR 1986.**

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.

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.

---

Thirteen week rule

Qs.17-20,28-31

---

These questions do not apply if informant is coded 3 or 4 at Q1(b) and has been sick, injured or unemployed for more than 13 weeks at time of interview.

See Q4 for number of weeks unemployed or sick.

---

Expenditure refunded by employer

Qs.17-20,27

---

Note changes for 1986

Please note that questions on expenses are restricted to those received from the current (or last) employer.

Where an informant states at Qs 17-20 or 27 that 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.

---

Mileage or fixed allowance

Q. 17

---

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.

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

The amount included in last net pay should be entered.

---

Specified car expenses

Q. 18

---

The amount included in last net pay should be entered.

This covers such items as parking fees, repairs, etc.

---

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

Q. 19

---

Note change for 1986

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

See also Q93 on Household Schedule.

Record type and amount of refund included in last net pay.

---

Other refunds/allowance from employer

Q. 20

---

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

---

Hours worked

Q.21-22

---

Note that for 1986 the question on hours have been reduced to two questions asking about usual hours worked and usual overtime worked. These must be asked of all answering Qs 10-16.

---

Usual hours

Q. 21

---

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. 22

---

Note this question refers only to paid overtime.

---

Items affecting last pay (prompt card 'C')

Q. 23

---

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.

NB: For 1986, Business Refunds (code 8) have been added

---

Usual pay

Q. 24

---

If a code has been ringed at Q.23, the informant would be expected to answer No ...X at Q.24 and usual pay given at Q.24(a) and (b).

---

Occasional additions to pay in last twelve months

Q. 25

---

Note change for 1986.

This amount should cover the total additions to pay received in the last 12 months.

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.

---

Occasional addition to pay included in usual net pay

Qs.26 & 27

---

These are asked of those whose last pay was not usual.

Record amount of addition to pay included in net usual pay.

---

Amount of tax relief

Q. 28

---

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.

---

Luncheon vouchers/meals/food supplied free

Q. 29-31

---

NOTE CHANGES FOR 1986.

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 milk, eggs or potatoes were supplied in quantities other than those on the schedule, please note this fact.

---

Subsidiary employment

Q. 32-37

---

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.

---

Refunds of expenses - subsidiary employment

Q. 37

---

See notes at Qs 17-20.

---

Self employed

Q. 38-43

---

NOTE CHANGES FOR 1986.

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 (Q43). 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. 38 ASK Q. 39.

At Q.43 enter 12 month period covered by income information.

---

---

Total turnover

Q. 40

---

Is asked of all not giving an answer to 38 or answering 'Don't know' to Q. 39 (a) or Q. 39 (d).

---

Self employed - sole ownership/partnership

Q. 41

---

Is asked of those answering Q. 38 or Q. 40. If informant unable to give a figure, then obtain a percentage or proportion of the amount he expects to receive.

---

Dates of most recent twelve months

Q.43

---

NEW FOR 1986.

This question was previously a dependent question at Q38, 39 and 40.

---

'A' schedule expenditure claimed for tax purposes (prompt card 'D') Q. 44

---

NOTE CHANGE FOR 1986.

Q. 44 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.

---

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

Qs.45-67

---

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

SEE GLOSSARY FOR INFORMATION REGARDING BENEFITS AND ADDITIONS TO BENEFITS.

---

It is important that the amount entered against each benefit is the actual amount for that benefit and is not the total for a combination of benefits eg Retirement



pension and Attendance Allowance. Always check for combinations of benefits. If you are aware that an amount is a combination of benefits which cannot be separated, please make a note giving the names of the combined benefits.

The most likely benefit to be included with other benefits is Supplementary Benefit (Q61). The inclusion of Supplementary Benefit with another benefit is noted at the front of the payment book or notification of entitlement form.

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. 46

---

Job release allowance should not be treated as NI retirement pension and should be entered at Q. 67

We have been asked by the DHSS that Retirement Pension at Q46 be probed especially for the possible inclusion of Attendance Allowance, which ideally should be separately entered at Q51. We have been told that Attendance Allowance is shown separately in the Retirement Pension payment book.

---

Severe Disablement Allowance

Q. 50

---

From November 1985 Severe Disablement Allowance replaces Non-Contributory and Housewives Non-Contributory Invalidity Pension.

---

Housing Benefit/rebate/allowance

Q.52

---

This question is asked of all spenders 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. 53-55

---

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)

---

SSP is paid through an employer while NI Sickness Benefit and Contributory Invalidity Pension are paid by DHSS.

They are paid to employees in the following order. Statutory Sick Pay usually paid by employer (8 weeks) - NI Sickness Benefit (20 weeks) - Contributory Invalidity Pension (period unlimited). From April 1986 the order will be SSP(28 weeks) - 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.

An unemployed person who becomes sick or an employed person who does not qualify for SSP receives NI sickness Benefit (28 weeks) followed by Invalidity Pension (unlimited period).

---

Sick pay by employers

Q.56

---

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.

---

Government training schemes

Q.57

---

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. 59(a).

Income from CP is a wage. Enterprise allowance should go at Q67.

---

Unemployment benefit/currently received

Q. 59

---

If informant is currently receiving Unemployment Benefit at time of interview check that they are coded 3 at Q. 1(b). unless on short time. If not coded 3, recode Q.1(b) 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 in last 12 months before or after attendance on a TOPS or YTS scheme, etc should be entered at this question.

If an informant is on short time they can receive a wage and Unemployment Benefit.

---

Supplementary benefit

Q. 61

---

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

Household bills paid directly by supplementary benefit should be shown at appropriate Household Schedule question with an explanatory note. The payment of Supplementary Benefit at Q61 should include an amount for the bill paid direct with a note to this effect.

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

---

Maternity pay

Q. 64

---

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.

---

Christmas bonus

Q. 66

---

NOTE THAT THIS QUESTION HAS CHANGED ITS ORDER ON SCHEDULE FOR 1986.

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.

---

OTHER STATE OR NI BENEFITS

Q. 67

---

NOTE THAT THIS QUESTION HAS CHANGED ITS ORDER ON SCHEDULE FOR 1986.

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.

---

Pension from Employer, Trade Union, Friendly Society,  
Annuity or Personal Pension or Covenant (Prompt card 'E' )

Q.69

---

This is a new question for 1986 and is a filter for Qs 69(a)-(d). which appear on page 27.

Note that reference number should be entered at the top of page 27.

There is no longer any need to specify industry for pension from previous employer.

Do not include pension from a previous employer at Q69(b) or 69(c). 69(b) refers to pension as member of trade union or friendly society and Q69(c) refers to personal pension.

100

---

Other deduction from an employee pension

Q. 70

---

Normally income tax is deducted from an employee pension (Q 69(a)). 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).

---

Savings Accounts (prompt card 'E')

Qs. 71 & 72

---

NOTE CHANGES FOR 1986.

Q71 asks which types of savings accounts have been held over the past 12 months.

Q72 is concerned with interest received or credited to the account over the past 12 months. If interest not known or cannot be estimated then ring code above box and make notes eg. the informant may volunteer the amount in account.

At Q72 Show joint accounts in one column with the second column left blank. Note that this has happened.

Where a person has an account at Q71 but has not received or been credited with interest at Q 72, write 'NIL' in box AND DO NOT RING CODE ABOVE BOX.

---

Holdings of Nat Sav. certs/SAYE/premium bonds, etc (prompt card 'F' & 'G') Q. 73

---

NOTE CHANGES FOR 1986. NOTE PARTICULARLY THAT CHILDREN UNDER 16 HOLDINGS ARE NOW ASKED FOR AT Q89.

At 73(b) enter the value code shown on prompt card G eg if informant has £150.00 of Premium Bonds enter code 3.

Holdings of certain National Savings investments are asked for two reasons. first to help the DHSS determine whether informants would be 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 cards 'H')

Q. 74

---

NOTE CHANGES FOR 1986.

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. 74(c1) the amount should be after deduction of tax at source. In rare cases, where only the gross before tax is available, then record this amount and a note stating 'gross only available'.

At Q74(d1) the amount should be before deduction of tax.

At Q74(e) note that what is wanted is interest from a private loan ie interest on loan made by informant in a private, not commercial, capacity.

---

Rent from property

Q. 75

---

Include here all rent from let or sublet property except that connected with self employment, which should be entered at Q. 38 Income Schedule.

---

Other unearned income

Q.76

---

NEW FOR 1986

Includes such income as;

1. Income as sleeping partner if declared as unearned income to Inland Revenue.
2. Income from owner of business who no longer takes an active part and has installed a manager. Only record if declared to Inland Revenue as unearned income.

---

Regular allowances received (prompt card 'K')

Q. 77

---

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 1986 an allowance for a foster child should be coded 4 if from local authority and coded 5 if from another source.

Exclude allowance from spouse who is not a member of household or who is an absent spender (see Q. 78)

SEE ALSO 3.10(b)

---

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

Q.78

---

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

SEE ALSO A8(b).

---

Coal or coke from employer

Q. 79

---

NOTE CHANGE FOR 1986

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. 80

---

Exclude weekly or season tickets mentioned in household schedule. Data collected for Q. 99 household schedule can, if necessary, be used to prompt this question. If the area does not have concessionary bus pass travel, then code 3.

---

Mail order agents/baby sitters

Q. 81

---

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 Q38)

Income in the form of goods acquired from a mail order club should not be entered.

---

Tax paid direct to Inland Revenue

Q. 82

---

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. 74(a) and (c).

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

---

Income tax refunded direct by Inland Revenue or DHSS

Q. 83

---

Note that from 1986 refunds from DHSS are included. DHSS can refund Income Tax if informant is or was unemployed.

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.

---

National Insurance (NI contributions)

Q.84

---

NOTE FILTER BASED ON AGE AND EMPLOYMENT STATUS

Q.84 is asked for everyone coded 2-7 at Q1 on the B schedule.

Do not include lump sum payments of NI contributions by self-employed, non-employed or those making up contributions, these should appear at Q.85.

---

Payment of NI contribution direct to Inland Revenue

Q. 85

---

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. 85.

---

Voluntary contributions when they are paid regularly (ie not a lump sum), should be entered at Q. 84 and not at this question.

---

Money sent abroad

Q. 86

---

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 'don't know'.

Amount recorded should be in £ sterling.

---

Income from occasional jobs

Q.87

---

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 9-31 for employee main jobs; Qs 32-37 for employee subsidiary job or Qs 38-44 for self-employed jobs. If necessary recode Q1.

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

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

NB. A separate line should be used for each time odd job is carried out

---

Childrens income - children under 16. (Prompt cards 'F' and 'G' ) Qs.88 & 89

---

Income of children under 16 is asked of the parent/guardian, to ensure that we get income of the whole household.

Q88. Include any regular income, however small, eg from newspaper round.

Do not include Child Benefit (enter at Q45). Do not include cash gifts or pocket money.

Q89. This was previously included at Q73. Record answers in the same way as at Q73.

CREDIT CARD S-BET  
DIARY RECORD  
CHECKING SCHEDULE

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- a. Credit card account payment sheets should be left with each informant who has a credit card (code 1 ringed at Q. 68 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, including the person number. Ring the seven day period ie '1' for first week, '2' for second week. DO NOT CODE CREDIT CARD NUMBER.
- 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:

1. 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 or services 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 S836C 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. 1.) 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 must be completed.

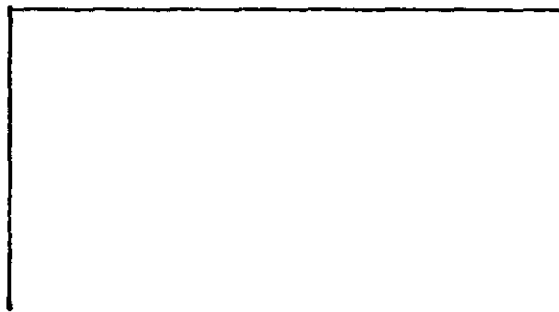
- 2.) Acquisitions by credit card during the two weeks record keeping period should not be recorded in diaries, with the following exception. If the large weekly shop is acquired on a credit card it would not be possible for the informant to remember all the items and prices when the credit card account is paid a month or so after the shopping has been done. In this case AND THIS CASE ONLY, acquisition should be recorded in diary with the words 'CREDIT CARD' written beside entry.

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 86

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

2. ACCESS

Date	Reference number	Description	Previous Balance
			389.01
12 08 86	J4645X	MUSIC DISCOUNT CENTRE, LONDON W1	4.50
02 09 86	K47DMO	WORDS AND MUSIC, LONDON SW15	17.90
03 09 86	K76M03	MUSIC DISCOUNT CENTRE, LONDON W1	4.50
04 09 86	LBXSSY	PAYMENT - THANK YOU	100.00 -
05 09 86	LLDIHT	B R WATERLOO, LONDON SE1	11.15
		INTEREST	8.64
			New Balance
			335.70
			Minimum Payment
			50.36

∅

\*

\*

\*

∅

\*

∅

∅

MINIMUM PAYMENT TO REACH US BY 16/10/86

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 (S836C)

\* = 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, household numbers and person numbers, remember the leading zero.

- 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

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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.

- 1. 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).
- 11. 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. 'Weekly shop' acquired on credit card. If the informant acquires his or her 'weekly shop' 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.

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

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

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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.

---

Fuel and light, household goods, cleaning materials, furniture D8

---

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

D9

---

a. Expenditure

State whether by bus, rail, tube, etc. Season tickets: state mode(s) of transport involved, then check if shown at Q. 67 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, question 93 on household schedule and questions 19, 20, 27, 28, 37 and 44 on income schedule.

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

---

Clothing, clothing materials and footwear

D10

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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.

---

Lessons, gifts, play schools, deposits, instalments and credit card payments, etc.

D11

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a. Lessons

If payments are recorded for lessons, eg driving, keep fit, aerobics, music, check whether this is FIRST lesson; if not ask Q. 84(b) 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.



11. 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.

111. 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 S836C.

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

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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:

1. Total amount spent, per day converted to sterling if possible. (Do not itemise purchases).
11. 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.
11. Amount of commission paid on traveller's cheques/foreign currency.
111. 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.

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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.

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. 93 household schedule and 19, 20, 27, 28, 37 and 44 income 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.

NOTE CHANGES FOR 1986

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.

FRONT PAGE

From 1986 the full name of the local authority covering the address at which interview took place must be entered on this page.

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 S836C.

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 (including postcode) so that there can be no mistake about the despatch of the £5 payment. Also obtain the informant's telephone number.
- 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<br>Schedule | Did any peculiar or unusual circumstances exist? If so, add notes regarding them at Q100 on the schedule.  |
| Income<br>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> . Has income for under 16 year olds been recorded at Q88 and 89? |

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

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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.

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

---

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 H) 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 6) 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.

'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 INCLUDING POSTCODE. 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:



**Office of Population Censuses and Surveys**  
*Social Survey Division*  
 St Catherines House 10 Kingsway London WC2B 6JP  
 Telephone 01-242 0262 ext

---

.....

.....

.....

.....

our ref.

--	--	--

---

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

NB: Some pre-carbonised copies have been made illegible due to constantly being overwritten. Before writing a set of 'E' forms, either detach from pad or use a card between sets in the pad.

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.

---

MOH	Area	<table border="1" style="border-collapse: collapse; width: 100px; height: 40px;"> <tr> <td style="width: 33%; text-align: center;">Area</td> <td style="width: 33%; text-align: center;">Ser</td> <td style="width: 33%; text-align: center;">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	No of households selected at address									
Postal Code	No of E forms from household									
Starting date of records										
Interviewer's signature			Auth No							

---

- 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 38 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 informants do not wish to be paid, you should suggest that they may wish to give the postal orders to charity. If money is to be given to charity, it must be sent to the charity by the informant. Monies cannot be given to charities by a government department.

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 your regional office. 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 for persons 1-3 followed by D schedules for person 1, D continuation pages for person 1, credit card sheets for person 1, D schedules for person 2, D continuation pages for person 2, credit card sheets for person 2, D schedule for person 3, D continuation pages for person 3, credit card sheets for person 3 etc.

Example - 3 spender household

1. B schedule for persons 1-3.
2. D schedule week 1 person 1.
3. D schedule week 2 person 1.
4. D schedule continuation page, week 1 person 1.
5. D schedule continuation page, week 2 person 1.
6. Credit card sheet, person 1.
7. D schedule week 1 person 2.
8. D schedule week 2 person 2.
9. D schedule continuation page, week 1 person 2.
10. D schedule continuation page, week 2, person 2.
11. Credit card sheet, person 2.

12. D schedule, week 1 person 3.
13. D schedule, week 2 person 3
14. D schedule continuation page, week 1 person 3.
15. D schedule continuation page, week 2 person 3.
16. Credit card sheet person 3.

b. Refusal, non-contacts - ineligibles

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.

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Study time

8.6

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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.

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Clerical time

8.7

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For checking each fully cooperating household - 1<sup>1</sup>/<sub>2</sub> 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.

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.

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Contact with HQ during field work period

8.9

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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:-

Your Regional Office - for any matters related to availability or non-availability and acceptance of quota and briefing dates.

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 2306

This is also the number to ring re; extensions to field period, changes to placing pattern and queries on schedules, instructions and interviews.

## FIELD TRAINING

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.

### First quota with trainers

Before your trainer joins you, transfer your address labels to your notebook, one to a double page. Record area number, serial number, gross and net rateable values etc. The example page shows the sort of records made for each address during the course of the survey (SEE NEXT PAGE).

Prepare a list of points to include in your introduction - ie purpose of FES and some of its uses.

EXAMPLE OF NOTEBOOK RECORD

AREA NO 322

02 27 STOATLEY RISE  
SALISBURY  
SP1 4AG

Checking call Monday 13 1900

4) Monday 13 19.10 -1930  
Checking call.

House & garage

Appt for final call Thursday 23.1 20.30

Gross Rateable value	£340
Nett rateable value	£250

NAME OF LA COVERING ADD: LONDON BOROUGH OF  
HAVERING

5) Thurs 23/1 20.30-21.00  
Final call

1) Thurs 2/1/86 14.00 NR

Telephone No: Salisbury 597621

2) Monday 6/1/86 18.15

Mr J S MATTHEWS  
Mrs S K MATTHEWS

Saw H/W (c.35) explained self, SSD,  
sample. Checked nos of 16s-(2)

27 STOATLEY RISE  
HARNHAM  
SALISBURY  
WILTS SP1 4AG

Explained will take an hour, and that  
it's to do with RP1

Appt - Thursday 9/1 - 18.30

3) Thursday 9/1 18.35 - 20.00

Placing interview. Record books start 9/1 (Thurs)  
Second week to start 16.1 (Thurs)



SPECIMEN FORM  
METHOD OF BENEFIT  
PAYMENT  
GLOSSARY

SECTION INDEX

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SPECIMEN HOUSING BENEFIT  
NOTIFICATION FORM

Dear Sir/Madam,

Housing Benefit Regulations 1982

Your application has now been examined, and on the basis of the information contained therein, it has been determined that your rent and rates should be rebated, as per the under-noted details.

- |     |   |   |                      |
|-----|---|---|----------------------|
| (a) | Rent Rebate   | £ | per week from Monday |
| (b) | Rate Rebate   | £ | per week from Monday |
| (c) | Housing Benefit Supplement £<br>(provisional) award |   | per week from Monday |
- (d) In accordance with the provisions of the above Regulations you may, within one month, make representation against this determination.
- (e) You are required to inform the Rebates Office staff of any change in the circumstances stated on your application form e.g. re. - members of the household, income, change of address.

Yours faithfully,

Director of Housing.

## METHOD OF PAYING 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	"
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
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.

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## GLOSSARY

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- 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. With a budget account 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. With an option account, goods are also 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  
(IE SHOP'S OWN CREDIT  
CARD - NOT GENERAL  
CREDIT CARD SUCH AS  
VISA, ACCESS ETC)**
- 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 households 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 -  
(SEE ALSO BUDGET/  
OPTION ACCOUNTS)

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.

Plastic cards issued by shops for their budget, option or monthly accounts ARE NOT CREDIT CARDS IN THE SAME SENSE AS BARCLAYCARD ETC.

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,

1. 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.

**FIXED INTEREST SAVINGS CERTIFICATES -** The value of the savings certificates remains the same during the life of the certificates. Interest is paid on the value of the certificates with an additional amount.



paid after five years. (See also Index linked savings certificates).

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).

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 111)
- ii. Rate Rebate (See page 111)
- 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 bonus. The age bar was lowered and with the second issue, the certificates became available to anyone. (see also Fixed Interest Savings Certificates).
- 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, Statutory Sick Pay).
- 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.

- 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 2-2<sup>1</sup>/<sub>2</sub> 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. From April 1986 it will be paid only to those not qualifying for SSP (See Statutory Sick Pay).

OLD PERSONS PENSION/  
OVR 80s 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.
- 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 - (SSP)** Employees receive SSP from their employer for the first 8 weeks of sickness in a tax year. This is followed by NI Sickness Benefit paid by DHSS. From April 1986 SSP will be paid for 28 weeks followed by Invalidity Pension.
- 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.
- TECHNICAL AND VOCATIONAL EDUCATIONAL INITIATIVE (TVEI) -** TVEI is the name given to a scheme whereby at 14 years of age children can drop some academic subjects and replace these with work orientated subjects eg information technology. The idea of the scheme is to better prepare children for work.
- '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 (YTS) Training can cover up to two years and takes place on the job or at college or school.

Payment is by allowance.

Known as Youth Training Programme in N Ireland.

## NOTE

### COMMUNICATION FROM THE DEPARTMENT OF EMPLOYMENT MAY 2, 1986

#### "Diary Codes

Expenditure shown in diary records covers cash and cheque payments only. Each diary code may occur for any spender in the household. The code may also occur in both weeks of record keeping and more than once within one person's weekly diary record.

Diary expenditure is aggregated into a personal product code which in turn becomes part of the household product code eg the value of code 122P for each spender forms part of code 373P

When we take on budgets onto the computer the procedure adopted to work out the weekly figure is as follows:-

- (a) All diary record books are punched separately for each week.
- (b) The computer divides the value of each item for each week by two and then sums the total for each individual item thus reducing all values to weekly equivalents.

I can also confirm that this is the standard procedure and that the data for all previous years including the year 1977 was recorded on the same basis."

Date of interview: Day [ ] Month [ ] 8 6  
 Starting date of records: Day [ ] Month [ ] 8 6

INTDAT(4) Q008  
 STARTOAT(5) Q009

Household Schedule

SEND(1) Q001  
 AREANUM(2A) Q003  
 SERNUM(2B) Ref No Q004  
 HHNUM(3) Q005  
 CHECKOIG(1B) Q002  
 LACODEA(5D) Q007  
 Off Use 86  
 Week LA

YEARA(5B) Q0010  
 WEEKA(5C) Q006

Ring	Personal No	(1) Relationship to HOH	(2) Sex	(3) Age	(4) Marital Status	(5) Current Full Time Education										(6) Income Unit		(7) Off Use	(8) Off Use	(9) Do not ring if an exception	(10) D records received for both weeks
						Primary Nursery School Play School	State schools	Private and independent schools	Higher Education	Off Use	Off Use										
1		HOH 0	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
2		WIFE 1	1	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
3		CHILD 2	2	1	3	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
4		PERSON-IN-LAW	3	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
5		DAUGHTER-IN-LAW	3	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
6		FATHER   MOTHER	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
7		FATHER-IN-LAW OR MOTHER-IN-LAW	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
8		BROTHER   SISTER	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
9		GRANDSON   DAUGHTER	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
10		OTHER RELATIVE	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	
		OTHER NON-RELATIVE	0	1	2	1	2	3	4	5	6	7	8	9	1	2	3	0	1	2	

If household member aged 16 or over not ringed give reasons and dates if absent

To all households (Ask hoh or wife)

OTHHOLIV (17A) Q11

11 Do any households besides your own household live at ..... (quote address)

Yes .....  
No .....

1
2

- Ask (a)  
- Go to 12

NOHHATAD (18) Q11A

(a) How many other households live at this address? .....

.....
-------

- 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 and enter number in first column (a) of grid below

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 and enter number in columns (a)-(c) of grid below

Individual prompt

		(a)	(b)	(c)
		Q.12 or 13(a)	Q.13(b)	Q.13(c)
	LINE NO.	USED SOLELY BY HOUSEHOLD	ROOMS SHARED	ROOMS LET OR SUBLET
Bedroom	1	NOBED(19) Q13A1	NOSHED (21)Q13B1	NOSLBED (39)Q13C1
Kitchen	2	NOKIT(20) Q13A2	NOSHKIT(30) Q13B2.	NOSLKIT(40) Q13C2.
Scullery used for cooking	3	NOSCU(21) Q13A3	NOSHSCUL (31)Q13B3	NOSLSCUL (41)Q13C3
Living room	4	NOLIVR(21A) Q13A4	NOSHLIVR (32)Q13B4	NOSLLIVR (42)Q13C4
Rooms partly used for business	5	NOPARB(22) Q13A5	NOSHPARB (33)Q13B5	NOSPARB (43)Q13C5
Rooms used only for business	6	NOSOLB(23) Q13A6	NOSHOLB (34)Q13B6	NOSLSOLB (44)Q13C6
Bathroom	7	NOBATH(24) Q13A7	NOSHBATH (35)Q13B7	NOSLBATH (45)Q13C7
Garage	8	NOGAR(25) Q13A8	NOSHGAR (36)Q13B8	NOSLGAR (46)Q13C8
Other rooms (specify below)	9	NOOTR(26) Q13A9	NOSHOTR (37)Q13B9	NOSLOTR (47)Q13C9

- Ask 14

To all households (Ask hoh or wife)

14 In addition to the rooms you have just told me about, are there any other rooms in this rateable unit (describe unit from 98)?

ROOMNOOC (60A)  
Q14

Yes →	1	- Ask (a)
No →	2	- Go to 15

(a) How many other rooms? \_\_\_\_\_

NOROOMNO (371) Q14A	- Ask 15
------------------------	----------

To all households (Ask hoh only)

15 How many years have you lived at this address?

Years →	LTRESYRS (60B) Q15 1	- Ask 16
---------	-------------------------	----------

If less than one year, probe for no. of months, if known

Months (if less than one year)	LTRESMTH (60C) Q15 2	- Ask 16
--------------------------------	-------------------------	----------

To all households (Ask hoh or wife)

16 Do you rent or do you own this accommodation? E P

Include caravan, mobile home or houseboat

Rents → X - Ask (a)  
 Owns → Y - Go to (b)  
 Neither → Z - 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
2
3
4
5
6
7
8

INAI21(61)Q16

Go to (d)

Go to 24

Probe to make certain not codes 1-6 then ask (d)

(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 6

(c) Do you receive your accommodation rent free? Yes No

(d) Does anyone outside your household pay rent on this accommodation on your behalf? (Exclude local authority or D.H.S.S. rent rebate/rent allowance/housing benefit - see 17-27)

Yes No

REPAYOH
(62) 2 Q160

Ask (I)-(III)  
Go to (e)

(I) How much rent did they pay last time?

RENTPAY
(63) Q16 0 1

(II) How long a period did this cover?

Enter Period code

PERCO63(64)
Q16 0 2

If code 9, specify period then ask (III)

(III) Does your employer pay this rent on your behalf?

Specify arrangement and rent paid .....

Yes No

WPRENT
(65) Q16 0 3

Ask (e)  
Specify arrangement on left then ask (e)

To renters coded X at 16 or rent free coded 7 at 16(c)

(e) Is your tenancy dependent on your job?

Yes No

INA110
(66) 2 Q16E

See 17

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all with rented accommodation (Ask hoh or wife)

DNA Rent free

Form with 'N' in a box, with 'L' and 'D' above it.

- Go to 24

17 Are you receiving a 100% housing benefit (rebate or allowance) for your rent from your local authority or your local Dept of Health and Social Security office?

Yes  
No

RR10PC (67) 2 Q17

See (a) or (b)  
- Go to 18

(a) For all local authority tenants with 100% housing benefit obtain (i)-(iii) below from the local authority office

DNA Non-council tenants

Form with 'N' in a box.

- Go to (b)

RR10LA (67A) Q17 A0

(i) Rent payable -

Include rates, water rates, heating etc if included in rent payable

(ii) How long a period does this cover?

Enter Period code

PERC067A (67B) Q17 A1

If code 9, specify period

(iii) Rent includes

Individual prompt

Rates?

Yes  
No

RR1010R (67K) 2 Q17A2

Specify amount

RR10DRAT (67C) Q17A 3

W Rates & S Rates?

Yes  
No

RR10DW (67D) 1 Q17 2 A4

Specify amount

RR10WR (67E) Q17A 5

Heating?

Yes  
No

RR10OH (67M) 1 Q17 2 A6

Specify amount

RR10OH EA (67E) Q17A 7

Other (specify)?

Yes  
No

RR10OT (67N) 1 Q17 2 A8

Specify on left and enter amount below

RR10OTH (67F) Q17 A9

Go to 23

(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

INA168 (67I) Q17B2 DK

RR10PA (67H) Q17B1

- Go to (ii)

Form with '1' in a box.

- Go to 23

(ii) How long a period does this cover?

Enter Period code

PERC067H (67J) Q17B3

If code 9, specify period

Go to 23

PERIOD CODES -					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9



To all with rented accommodation who pay all or part of their rent (code 2 at 17) (Ask hoh or wife)

18 How much rent did you actually pay last time (including any rooms you sublet)?

Include rent paid for caravan, mobile home and houseboat

RENT Q18	(70)
-------------	------

19 How long a period did this cover?

Enter Period code

PERCOT0 (11) Q19	(71)
---------------------	------

If code 9, specify period

20 Do you have a rent holiday?

Yes  
No

RENTHDAY (11A) 2 Q20	(11A)
-------------------------	-------

- Ask (a)  
- Go to 21

(a) For how many weeks of the year?

RENTHOL (12) Q20A	(12)
----------------------	------

21 Did you receive housing benefit/rent rebate/rent allowance from your local authority or your local Dept. of Health and Social Security office in connection with your last rent payment?

Yes  
No

RENTREB (13) 2 Q21	(13)
-----------------------	------

- Ask (a)  
- Go to 22

(a) How much was the housing benefit/rent rebate/rent allowance?

[Exclude rates rebate - see 25]

RRAMTDK (14A)  
Q21A2. DK

RRAMT (14) Q21A1	(14)
---------------------	------

- Ask (b)

1	(1)
---	-----

- Go to (c)

(b) How long a period did this cover?

Enter Period code

PERCOT4 (15) Q21B	(15)
----------------------	------

If code 9, specify period

(c) Was the housing benefit/rent rebate/rent allowance

deducted from the last rent payment?

or returned direct to you in a lump sum, that is by cash, cheque or giro?

RRRETMET (16) Q21C	(16)
-----------------------	------

- Ask (f)

- Go to 22

(f) Is the amount for rent you mentioned earlier before or after deduction of the housing benefit/rent rebate/rent allowance?

Before  
After

RENTBAR (17) 2 Q21C1	(17)
-------------------------	------

- Ask 22

22 Does the rent you mentioned include any services such as:

- |                  |                        |     |                                 |
|------------------|------------------------|-----|---------------------------------|
| Running lighting | cleaning               | Yes | Specify below and enter amounts |
| Prompt heating   | lift                   |     |                                 |
| hot water        | gardener               |     |                                 |
| T.V. licence     | or any other services? |     |                                 |

RENTINSV (17A) 2 Q22 1	(17A)
---------------------------	-------

- Go to 23

Exclude gas/electricity budget/credit schemes which would appear at 53

Type of service

SERVINC1 (17B) Q22 2	(17B)
-------------------------	-------

SERVINC2 (180) Q22 3	(180)
-------------------------	-------

SERVINC3 (18C) Q22 4	(18C)
-------------------------	-------

Ask 23

PERIOD CODES:-

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all with rented accommodation (coded X at 18) (Ask hoh or wife)

23 Does the rent include rates?

Yes \_\_\_\_\_  
No \_\_\_\_\_

INA 1173 (79) 2 Q23
------------------------

- Go to 25  
- Ask 24

To all households except those coded 1 at 23 (Ask hoh or wife)

24 Do you pay rates on this accommodation?

Yes \_\_\_\_\_  
No \_\_\_\_\_

RATES (80) Q24 2
---------------------

- Ask (a) and (b)  
- Go to 25

(a) How many times a year do you pay rates?

No of times \_\_\_\_\_

RATESPER (82) Q24A
-----------------------

(b) How much did you actually pay last time in rates?

RATES PAY (81) Q24B
------------------------

- Ask 25

To all households (Ask hoh or wife)

25 Did you receive any housing benefit/ rates rebate from your local authority or your local Department of Health and Social Security office in connection with your last rates/rent payment?

Yes \_\_\_\_\_  
No \_\_\_\_\_

INA 1140 (90) 2 Q25
------------------------

- Ask (a)  
- Go to 26

(a) Was the housing benefit/rates rebate deducted from your last rates/rent payment?

Yes \_\_\_\_\_  
No \_\_\_\_\_

DEDRFLP (91) 2 Q25A1
-------------------------

- Ask (i)-(iii)  
- Go to 26

(i) How much was deducted?

RRDED AMT (92) Q25A2
-------------------------

RRDOAMDK(92A) →  
Q25A3 DK →

1
---

- Go to (ii)

(ii) What period did this housing benefit/ rebate cover?

Enter Period code \_\_\_\_\_

PERC92 (93) Q25A4
----------------------

If code 9, specify period.

RRDOPEDK(93A) →  
DK Q25A5 →

1
---

- Ask (iii)

(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?

Before \_\_\_\_\_  
After \_\_\_\_\_

RATESBAR (94) 2 Q25A6
--------------------------

Code at left and ask 26

Specify documents

Interviewer to code whether documents	Seen by interviewer	1
	Consulted by informant	2
	Not consulted	3

PERIOD CODES -

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all households (Ask hoh or wife)  
(Check that 25 has been asked)

26 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 \_\_\_\_\_  
No \_\_\_\_\_

E	P
RATESLSR (95) 2 Q26	

- Ask (a)  
- See 27

(a) How much was the amount refunded?

RALSRA	AMT
(96) Q2	6A1

- Ask (b)

RLSRAMOK(96A) →  
Q26A2 DK →

1
---

- See 27

(b) What period did the housing  
benefit/rebate cover?

Enter  
Period code →

PERC96	(97) Q26 B1
--------	-------------

If code 9,  
specify period

RLSRPEDK(97A) →  
Q26B2 DK →

1
---

- Ask (c)

(c) In which month and year did you  
receive it?

Enter month  
and year as  
two digit code

Month

1NA	127
-----	-----

Year. 19

(98) Q26c
-----------

- Ask (d)

(d) Have you received more than  
one lump sum rebate in the  
last 12 months?

Yes \_\_\_\_\_  
No \_\_\_\_\_

MTOARREB	(99) 2 Q26D1
----------	--------------

- Ask (a)-(c) and  
record answers in  
left hand margin  
- See 27

LASLSRAR(100)  
Q2602 →

PERC100(101) Q2603 →

OFF. USE	

To all with housing benefit (coded 1 at 17  
or 1 at 21) and/or rate rebate (coded 1 at 25  
or 1 at 26) (Ask hoh or wife)

DNA Others →

N
---

- Go to 28

27 Did the rebate/allowance include  
Housing Benefit Supplement?

Yes \_\_\_\_\_  
No \_\_\_\_\_  
DK \_\_\_\_\_

1NA	1 155
(102) 2	Q27
3	

- Ask (a) & (b)  
- Go to 28

(a) How much Housing Benefit  
Supplement was included?

HBSAMT	(103) Q27 A1
--------	--------------

- Ask (b)

DK HBSAMTOK  
(103A) Q27 A2 →

1
---

- Go to 28

(b) What period did this cover?

Enter  
Period code →

PERC103	(104) Q27 B
---------	-------------

If code 9,  
specify period

Interviewer to code whether documents:	Housing benefit supplement.	Specify documents
	Seen by interviewer .....	1 .....
	Consulted by informant .....	2 .....
	Not consulted .....	3 .....

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

Code at left end  
ask 28

To all households (Ask hoh or wife)

28 Is your accommodation connected to the mains sewerage?

Yes → **MAINSEW (83) 2 Q28** → Ask 29  
 No →

29 Do you pay separate water and/or sewerage rates?

Yes → **WAOSRATE (84) 2 Q29** → Ask (a) and (b)  
 No → Go to 30

(a) How many times a year do you pay water and/or sewerage rates?

No of times → **WRATEPER (86) Q29A**

(b) How much did you actually pay last time in water and/or sewerage rates?

**WRATEPAY (85) Q29B**

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 → **OTH PAY (104A) 2 Q30 1** → Specify below and enter amounts  
 No to all → See 31

Type of charge and amount	What period did this cover?	Code period	<b>OTH PY Am 1 (104D) Q30 2</b>	
			<b>PERC104D (104G) Q30 3</b>	If code 9, specify period
Type of charge and amount	What period did this cover?	Code period	<b>OTH PY Am 2 (104E) Q30 4</b>	
			<b>PERC104E (104H) Q30 5</b>	If code 9, specify period
Type of charge and amount	What period did this cover?	Code period	<b>OTH PY Am 3 (104F) Q30 6</b>	
			<b>PERC104F (104I) Q30 7</b>	If code 9, specify period

See 31

**PERIOD CODES -**

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all who own with mortgage or loan (Ask hoh or wife)  
(coded 5 at 16(b))

Exclude second mortgages not for the purchase  
of this accommodation (see 69)

DNA Coded 1-4 at 16(a), 6 at 16(b), or 7 & 8 at 16(c) → 

E	N	P

 - Go to 43

31 Did you get the mortgage or loan to purchase your accommodation from a ..... Building Society → 0 1  
Local Authority → 3 2  
Bank → 1 3  
Insurance company → 4 4  
Other source? → 5 5  
INAI 19  
- Specify on left

Running prompt

Specify .....

32 Did the last mortgage or loan payment you made cover ..... Prompt interest only? → MORTTYPE  
Interest and capital/principal? → (118) 2 Q32 - Ask 33-35  
- Go to 36

If more than one mortgage for purchase of accommodation, record details of other mortgages in left-hand margin

To those where last payment covered interest only (coded 1 at 32) (Ask hoh or wife)

33 How much did you pay last time as interest on the mortgage or loan? → MORIN PAY (119) Q 33

34 How long a period did this cover? Enter Period code → PERC119 (120) Q 34 - If code 9, specify period

35 Is there an endowment policy covering the repayment of the capital/principal of the mortgage or loan? Yes → MEN POL (121) 2 Q35 - Ask (a)-(d)  
No → 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? → MENPO LAM (122) Q 35A

(b) How long a period did this cover? Enter Period code → PERC122 (123) Q35B1 - If code 9, specify period

(c) Has this insurance premium been included in the amount of interest you mentioned earlier (see 33)? Yes → MENPTOUT (123A) 2 Q35B2  
No →

(d) Was the insurance taken out before April 1984? → INCININT (124) Q35C - Go to 41  
April 1984 or later? →

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To those where last payment covered interest and capital/principal (coded 2 at 32)

(Ask hoh or wife)

36 How much was your last instalment on the mortgage or loan?

INTPR PAY  
(125) Q 36

- Ask 37

37 How long a period did this cover?

Enter Period code

PERC125  
(126) Q 37

If code 9, specify period

38 How much interest did you pay over the 12 months for which you have figures?

INTL12M  
(127) Q 38 1

- Ask (a)

INL12MOK  
(127A) Q 38 2 DK →

1

- Go to 39

(a) What dates does this cover?

Enter month and year as two digit code

Beginning

Month

INA 158

Year 19

(128) Q 38 A1

Ending

Month

INA 159

Year 19

(129) Q 38 A2

- Ask 39

39 For how many years have you had the mortgage/loan you have just told me about?

INA133  
(129A) Q 39 1

- Ask 40

MLTRUNDK (129B) Q 39 2 DK →

1

- Ask 40

40 How many years does the mortgage/loan still have to run?

INA134  
(129C) Q 40 1

- Ask 41

MLTORNDK (129D) Q 40 2 DK →

1

- Ask 41

Code at left and ask 41

	Mortgage payments	Specify documents
Interviewer to code whether documents	Seen by interviewer	1
	Consulted by informant	2
	Not consulted	3

PERIOD CODES -					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

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

E	P
INA 1 163	
(130) <sup>2</sup> Q41	
3	

Ask 42

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

MOTHAMIN	
(130A) <sub>2</sub> Q42	

- Ask (a)  
- Code at foot of page and go to 43

(a) How much of your last payment was for:

Individual prompt

Insurance of structure?

Period covered?

Enter period code

INCSTAMT	
(132) Q 42A1	

- Ask period covered

PERC132	
(133) Q42A2	

If code 9, specify period

Mortgage protection policy?

Period covered?

Enter period code

IWCMP	AMT
(135) Q	42A3

- Ask period covered

PERC135	
(136) Q42A4	

If code 9, specify period

Now ask when policy taken out

Policy taken out

before April 1984?

April 1984 or after?

INCM DAT	
(137) Q42A5	

Ask 43

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all households (Ask hoh or wife)

43 Do you pay any (other) insurance premium on the structure of this accommodation?

Yes  
No

STR<sub>1</sub>INS  
(140)<sub>2</sub>Q43

- Ask (a)-(c)  
- Go to 44

(a) How much was the last premium?

STRIN AMT  
(141)Q 43A

(b) How long a period did this cover?

Enter Period code

PERC141  
(142)Q43 B

If code 9, specify period

(c) Does this premium also cover contents insurance?

Yes  
No

SAMTINCC  
(142A)Q43 C

- Ask (i)-(ii)  
- Go to 44

If premium covers structure and contents, and items cannot be separated, ask

(i) Insured value of house

ACCOM VAL  
(146)Q 43C1

(ii) Insured value of contents

CONTV AL  
(147)Q 43C2

- 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

CONT PREM  
(148)<sub>2</sub> Q44

- Ask (a) and (b)  
- Go to 45

(a) How much was the last premium on the furniture and contents?

CONPR AMT  
(149)Q 44A

(b) How long a period did this cover?

Enter Period code

PERC149  
(150)Q44 B

If code 9, specify period

45 Do (any of) you pay an (additional) insurance premium on any kind of personal possessions?

Yes  
No

INPE<sub>1</sub>RP  
(151)<sub>2</sub> Q45

- Ask (a) and (b)  
- 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?

PERPAA Y  
(152)Q 45A

(b) How long a period did this cover?

Enter Period code

PERC152  
(153)Q45 B

If code 9, specify period

Ask 46

PERIOD CODES -

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal month	- 5	Year	8
Three weeks	- 3	Three months	- 6	Other period	- 9



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

Exclude:  
National Insurance

RECORD 25

Yes \_\_\_\_\_  
No \_\_\_\_\_

LIFE INS  
(154) 2 Q46

Record details in grid below  
Go to 47

RECORD 71

LINSPNO (154A) Q46 2.

Per No paying	Item No	Purpose of policy eg House purchase endowment mortgage protection	OFF. USE.	When taken out before		Enter period code	If code 9, specify period	Amount paid	
				April '84	April '84 or later			£	p
	1	MORTGAGE PROTECTION - 1 POLICY		1	2				
	2	HOUSING ENDOWMENT POLICY - 2		1	2				
	3	ENDOWMENT POLICY - 3	4	1	2				
	4	LIFE OR DEATH POLICY - 4	(154E) Q46	1	2				
	5	OTHER POLICIES - 5	(154F) Q46	1	2				
	6		LINS TYPE	1	2				
	7		LINS TYPE	1	2				
	8		LINS TYPE	1	2				

Ask 47

47 Do (any of) you regularly pay premiums on other policies such as personal accident or private medical insurance?

Include:  
Friendly Societies sickness insurance, sick clubs, Private medical insurance schemes such as BUPA, PPP etc, Animal insurance

Exclude:  
Car, motor cycle, house contents or personal possessions insurance, holiday insurance, works sick clubs

RECORD 25

Yes \_\_\_\_\_  
No \_\_\_\_\_

MEDINETC  
(164) 2 Q47 1

Record details in grid below  
Go to 48

RECORD 72

Per No paying	Item No	Purpose of policy	Insurance company	OFF. USE.	Enter period code	If code 9, specify period	Amount paid	
							£	p
	1	PERSONAL ACCIDENT - 1						
	2	PRIVATE MEDICAL - 2						
	3	FRIENDLY SOCIETY - 3						
	4	SICK CLUB - 4						
	5	OTHER POLICIES - 5						

Ask 48

PERIOD CODES:-

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all households

Ask all spenders

48 In your (part of this) accommodation do (any of) you have a TV set video recorder home computer or TV game?

RECORD 25

Yes \_\_\_\_\_  
No to all \_\_\_\_\_

TVVIDEO  
(11A)<sub>2</sub>Q481

- Ask (a)  
- Go to 49

RECORD 73

Use separate column for each item and person

Per No	TVPERNO (171B)	Q48 2	
--------	----------------	-------	--

Item No	TV 1 ITEM NO (11C)	Q48 3	4
---------	--------------------	-------	---

(a) Do you have a television set? video recorder? home computer? TV game?

Use separate column for each item and person

1	1	1	1
TV 2 TYPE (11 2 D)	Q48 2 A		2
3	3	3	3
4	4	4	4

- Ask (b)

(b) Do you rent it? Yes No

TVR RENTED (11E) <sub>1</sub>	Q48 B	1	1
2		2	2

- Ask (i)-(ii)  
- Go to 49

(i) Do you pay the rent by regular payments to a rental company? slot meter? other (Specify)?

Prompt

1	1	1	1
TV H2D W PAY (11F) <sub>2</sub>	Q48 C	2	2
3	3	3	3

- Ask (ii)-(iii)  
- Go to (c)  
Specify on left and ask (ii)-(iii)

Specify 1) 2) 3) 4)

£ P £ P £ P £ P

(ii) How much did you pay last time

TV PAY AMT (11G)	Q48 D		
------------------	-------	--	--

- Ask (iii)

(iii) How long a period did this cover?

PERC 11 G	(171H)	Q48 E	
-----------	--------	-------	--

Enter period code

If code 9, specify period  
- Go to 49

Slot meter (coded 2 at (b(i)))

(c) Did you get a rebate when the meter was last cleared? Yes No

TVS <sub>1</sub> MR	(11 I)	Q48 <sub>2</sub> F	1
2			2

- Ask (i)-(ii)  
- Go to 49

(i) How much was the rebate before any deductions for hire purchase or credit purchase?

TVSMR AMT (11J)	Q48 G		
-----------------	-------	--	--

- Ask (ii)

(ii) How long a period did this cover?

PERC 11 J	(171K)	Q48 H	
-----------	--------	-------	--

Enter period code

If code 9, specify period  
- Ask 49

PERIOD CODES -			
Week	- 1	Four weeks	- 4
Two weeks	- 2	Cal month	5
Three weeks	3	Three months	- 6
		Six months	- 7
		Year	8
		Other period	- 9

To all households (Ask hoh or wife)

49 Is there a telephone installed in your (part of this) accomodation?

Exclude disconnected telephones.

Yes	→	<b>INA 1102</b>	- Ask (a)-(c)
No	→	<b>(258) Q 49</b>	- Go to 50

(a) How much was the last account/ advice you paid to British Telecom 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

.....  
.....

<b>TELEB ILL</b>
<b>(259) Q 49A</b>

(b) How long a period did this cover?

Enter Period code	→	<b>PERC259</b>	If code 9, specify period
		<b>(260) Q 49B</b>	

(c) Did anyone outside the household share the cost of the account?

Yes	→	<b>TELDISCON</b>	- Ask (i)-(iii)
No	→	<b>(261) Q 49C</b>	- Go to 50

(i) What was your share of the account?

<b>TELSH AMT</b>
<b>(261A) Q 49C</b>

(ii) How long a period did this cover?

Enter Period code	→	<b>PERC261A</b>	If code 9, specify period
		<b>(261B) Q 49C2</b>	

(iii) Was the other part paid by a business or organisation?

Yes	→	<b>TELSH BUS</b>	- Ask 50
No	→	<b>(261C) Q 49C3</b>	

To all spenders

Ask all spenders

50 In the last 12 months, that is since ....., have (any of) you bought a T.V. licence?

Yes	→	<b>TVL 1 IC</b>	- Ask (a)
No	→	<b>(265) Q 50</b>	- Go to 51

(a) How much have you paid for your T.V. licence(s) in the last 12 months?

<b>TVLIC FEE</b>
<b>(266) Q 50A</b>

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all households (Ask hoh or wife)

51 In this accommodation do you have

Include items owned, rented, supplied by employer or available for continuous use

Individual prompt

a washing machine?

Yes No

INA 1108 (180A) Q51 1

a fridge-freezer (that is a deep freeze with its own door combined with a refrigerator also with its own door)?

Yes No

INA 1164 (180B) Q51 2

a separate refrigerator?

Yes No

INA 1165 (180C) Q51 3

a separate deep freeze?

Yes No

INA 1166 (180D) Q51 4 - Ask 52

52 In this accommodation do you have full or partial central heating by

Individual prompt

electricity? Include storage heaters

Yes No

INA 1150 (181A) Q52 1

gas?

Yes No

INA 1151 (181B) Q52 2 - See (a)

solid fuel?

Yes No

INA 1153 (181C) Q52 3

oil?

Yes No

INA 1152 (181D) Q52 4 - Ask (a)

Yes but DK fuel? INA 1154 (181E) Q52 5

1

To all with oil central heating

DNA (Others)

N

- Go to 53

(a) Have you purchased any oil for the central heating in the last 12 months?

Yes No

OILPURCH (182) Q52A1

- Ask (l)

- Go to 53

(l) What was the total expenditure on oil in the last 12 months?

OILEXP (183) Q52A 2

OILEXPDK (183) Q52 A 3

1 - Ask 53

To all households (Ask hoh or wife)

53 Do you have gas, electricity or both supplied to your (part of this) accommodation?

Gas only	→	1	INA103 (184A)	- Ask (a) - Go to (b) - Ask (a) for gas and then (b) for electricity - Go to 61
Electricity only	→	2		
Both	→	3		
Neither	→	4		

(a) Do you pay for your gas by

Running Prompt

Slot meter*	→	1	INA128 (186)	- Go to 54 - Go to 55 - Go to 56 - Specify on left and go to 55
Account	→	2		
Board Budgeting Scheme	→	3		
Or by some other method?	→	4		

Specify.....

\*Include meter owned by landlord, but exclude meter with own key

(b) Do you pay for your electricity by

Running Prompt

Slot meter*	→	1	INA130(196)	- Go to 54 - Go to 55 - Go to 56 - Specify on left and go to 55
Account	→	2		
Board Budgeting Scheme	→	3		
Or by some other method?	→	4		
(N. Ireland only) C.O.C.D.	→	5		- Go to 55

Specify.....

\*Include meter owned by landlord, but exclude meter with own key

To those paying by slot meter (coded 1 at 53(a) or 53(b))

54 In the last 12 months, that is, since ..... have you received a rebate for gas/electricity?

Gas.	Yes	→	GASSM(187) Q54 2 1	- Ask (a) & (b) for gas
	No	→		

Elec.	Yes	→	ELEC SM(191) Q54 2 2	- Ask (a) & (b) for electricity - Go to 61
	No	→		

(a) How much was the last rebate before any deductions for hire purchase or credit purchase?

Gas	→	GASSM REB OFF Q54 A1
Electricity	→	ELEC M REB (18) Q54 A2

(b) How long a period did this cover?

Gas.	Enter period code	→	PERC188 (189) Q54 B1	If code 9, specify period
Elec.	Enter period code	→	PERC198 (189) Q54 B2	If code 9, specify period

Check to see if 55-60 apply. If not, go to 61.

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To those paying by account or some other method (coded 2 or 4 at 53(a) or (b))  
(Ask hoh or wife)

55 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 charges

Gas

Electricity

GASA	CC
(192)Q5	51
ELECA	CC
(202)Q5	52

Go to 59

To those paying by board budgeting scheme (coded 3 at 53(a) or (b)) (Ask hoh or wife)

56 How much was your last payment under this scheme?

Gas

Electricity

GASBBS	S
(190)Q5	61
ELEC BBS	S
(200)Q5	62

Ask 57

57 How long a period did this cover?

Gas

Enter period code

Elec

Enter period code

PERC190	
(191)Q5	71

If code 9, specify period

PERC200	
(201)Q5	72

If code 9, specify period

Ask 58

58 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 and regular maintenance charges

Gas

Electricity

GASCH	AR
(191A)Q5	81
ELECH	AR
(201A)Q5	82

Ask 59

To all paying by account or some other method (coded 2 or 4 at 53(a) or (b))  
To all paying by board budgeting scheme (coded 3 at 53(a) or (b))

59 How long a period did this cover?

Gas

Enter period code

Elec

Enter period code

PERC192	
(193)Q5	91

If code 9, specify period

PERC202	
(203)Q5	92

If code 9, specify period

60 What was the date of your last account/advice (as shown on the account/advice)?

Enter month and year as two digit code

Gas

Month

Year 19

Elec

Month

Year 19

INA	138
-----	-----

(194)	Q601
-------	------

1
---

INA	139
-----	-----

(204)	Q603
-------	------

1
---

Code below then ask 61

A1380k(194)Q602

A1390k(204)Q604

	Gas	Specify documents	Electricity	Specify documents
Interviewer to code whether 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 and person

Use separate column for each vehicle and person

Per No	CPERSON 0 (206)	Q 61 1		
--------	-----------------	--------	--	--

Item No	CIT 1 EM NO 2 (206A)	Q 3 61 2		4
---------	----------------------	----------	--	---

61 Do (any of) you at present own or have the continuous use of a:

- Car
- Van
- Motor cycle
- Moped
- Other motor vehicle specify?
- None of these

Running prompt

Per. No. Specify

VEH TYPE	1	1	1	1
	2	2	2	2
	3	3	3	3
	4	4	4	4
	5	5	5	5
	6	6	6	6

Ask (a)-(f)

- Go to 63

(a) How much have you paid in vehicle licence(s) (Road Fund Tax) during the last 12 months for the (type of vehicle)?

CARTAX (208)	Q 61 A 1			
--------------	----------	--	--	--

If nil, code below and go to (d)

Nil	CARTAX NL 9 (208A)	Q 61 A 2		9
-----	--------------------	----------	--	---

(b) How long a period(s) did the amount(s) cover (eg year, six months)?

Enter period code	PERC 208 (209)	Q 61 B		
-------------------	----------------	--------	--	--

If code 9, specify period

(c) When was the vehicle licence last renewed by you?

Enter month and year as two digit code

Month	CARTX DAT (210)	Q 61 C		
Year. 19				

(d) How much have you paid in vehicle insurance during the last 12 months for the (type of vehicle)?

CAR INS (211)	Q 61 D 1			
---------------	----------	--	--	--

If nil, code below and go to (f)

Nil	CAR INS NL 9 (211A)	Q 61 D 2		9
-----	---------------------	----------	--	---

(e) How long a period(s) did the amount(s) cover (eg year, 3 months, calendar month)?

Enter period code	PERC 211 (212)	Q 61 E		
-------------------	----------------	--------	--	--

If code 9, specify period

(f) Did you own the or did you have continuous use of it?

- Own
- Continuous use

CONTUSE (213)	Q 61 F	1	1
		2	2

- See 62  
- See (g)

To all who have continuous use of car DNA. Others (owned cars: all vans, motorcycles, mopeds etc.)

N	N	N	N
---	---	---	---

- See 62

(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?

CAR PROV (214)	Q 61 G	1	1
		2	2
		3	3

Ask 62

To all with cars

DNA. Others (vans, motorcycles, mopeds etc.)

N	N	N	N
---	---	---	---

- Go to 63

62 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

PETROL (215)	Q 62 1	1	1
		2	2

- Ask (i)  
- Go to 63

(i) Does the employer provide some or all of the petrol expenditure for your private motoring?

- Some
- All

PET RPR OV (215A)	Q 62 2	1	1
		2	2

Ask 63

To all households

Ask all spenders

63 (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

Use separate column for each vehicle and person

OCITEMNO (217A) Q 63 2

Per No. →

Item No. →

Use separate column for each vehicle and person			
OC PERS	NO (217)	Q 63 1	

1	2	3	4
1	2	3	4
2	3	4	5
3	4	5	6
4	5	6	
5	6		
6			

Running prompt

- Car →
- Van →
- Motor cycle →
- Moped →
- Other motor vehicle specify? →
- None of these →

Per No Specify

Ask (a)-(f)

- See 64

(a) How much have you paid in vehicle licence(s) (Road Fund Tax) during the last 12 months for the

OCARTAX (219) Q 63 A 1

£	p	£	p	£	p	£	p

If nil, code below and go to (d)

OCARTXNL (219A) Q 63 A 2

Nil →

9	9	9	9
---	---	---	---

(b) How long a period(s) did the amount(s) cover (eg year, six months)?

Enter period code →

PERC 219 (220)	Q 63 B.		

If code 9, specify period

(c) When was the vehicle licence last renewed by you?

OCTAXDAT (221) Q 63 C

Month →


Enter month and year as two digit code

Year 19

(d) How much have you paid in vehicle insurance during the last 12 months for the

OCARINS (222) Q 63 D 1

--	--	--	--	--	--	--	--

If nil, code below and go to (f)

OCARINNL (222A) Q 63 D 2

Nil →

9	9	9	9
---	---	---	---

(e) How long a period(s) did the amount(s) cover (eg year 3 months calendar month)?

Enter period code →

PERC 222 (223)	Q 63 E.		

If code 9, specify period

(f) Did you own the or did you have continuous use of it?

OCCONT (224) Q 63 F

- Own →
- Continuous use →

1	1	1	1
2	2	2	2

See 64

PERIOD CODES -			
Week	- 1	Four weeks	- 4
Two weeks	- 2	Cal month	- 5
Three weeks	- 3	Three months	- 6
		Six months	- 7
		Year	- 8
		Other period	- 9



To all spenders who own or have owned a vehicle during the last 12 months (coded 1 at 61(f) or 63(f))

DNA \_\_\_\_\_ N - Go to 66

Use separate column for each vehicle and person

CPITEMNO (226A)  
Q642

64 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?

Use separate column for each vehicle and person			
CPPERSNO (226)	Q641		

Per. No. →

Item No. →

1	2	3	4
---	---	---	---

Yes →  
No →

CAR <sub>2</sub> PUR (226 <sub>2</sub> <sup>1</sup> B)	Q64 <sub>2</sub> <sup>1</sup> 3	1
		2

Code vehicle below - Go to 65

Include bank overdrafts  
Exclude Loan from organisation, bank, finance house or H.P. (enter at 68, 69)

Car →  
Van →  
Motor cycle →  
Moped →  
Other motor vehicle specify? →

Q64 <sup>1</sup> TYPE	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5

Ask (a)-(e)

Per. No. Specify

(a) Was it new or secondhand?

New →  
Secondhand →

NO CARP (226 <sub>2</sub> <sup>1</sup> )	Q64 <sub>2</sub> <sup>1</sup> A.	1
		2

(b) When was the vehicle acquired?

CARPDAT (229)  
Q64B

Month

→									
---	--	--	--	--	--	--	--	--	--

Enter month and year as two digit code

Year. 19

--	--	--	--	--	--	--	--	--	--

(c) What was the total cash price of the vehicle?

CARPAMT (230)  
Q64C

→									
---	--	--	--	--	--	--	--	--	--

(d) Was Road Fund Tax/Vehicle insurance included in the cash price?

CARPTINS (230A)  
Q64D1

Yes →  
No →

1	1	1	1
2	2	2	2

Ask (f)  
Go to (e)

(f) How much was included for

CPCTAXAM (232)  
Q64D2  
Road fund tax?

→									
---	--	--	--	--	--	--	--	--	--

Running prompt

CPINSAMT (234)  
Q64D3  
Vehicle Insurance?

→									
---	--	--	--	--	--	--	--	--	--

(e) Was anything allowed for part exchange/trade in?

CPPARTEX (234A)  
Q64E1

Yes →  
No →

1	1	1	1
2	2	2	2

Ask (f)  
Go to 65

(f) How much was allowed for part exchange/trade in?

CPPARAMT (235)  
Q64E2

→									
---	--	--	--	--	--	--	--	--	--

Ask 65

To all spenders who own or have owned a vehicle during the last 12 months (coded 1 at 61(f) or 83(f))

DNA \_\_\_\_\_ N \_\_\_\_\_

Go to 66

Use separate column for each vehicle and person

Use separate column for each vehicle and person			
CSPERS	NO (235A)	Q65 1	

CSITEMNO (235 B) Q65 2.

Per No →	1	2	3	4
Item No →	1	2	3	4

65 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 →	CARSOLD (236) Q65	3	1	1
No →		2	2	2

Code vehicle below  
Go to 66

Running prompt

Car →  
Van →  
Motor cycle →  
Moped →  
Other motor vehicle specify? →

CSOLDTYP (236A) Q65 4	1	1	1
	2	2	2
	3	3	3
	4	4	4
	5	5	5

Ask (a) & (b)

Per No Specify

(a) When did you sell the vehicle? (237) Month  
Enter month and year as two digit code Year 19  
CSOLDDAT (237) Q65 A

Month	Year 19				
-------	---------	--	--	--	--

(b) Did you receive payment by cash cheque or giro? CRECPAY (238) Q65 B 1  
Yes →  
No →

Yes →	1	1	1	1
No →	2	2	2	2

Ask (i)  
Go to 66

CRECAMT (239) Q65 B 2.  
(i) How much did you receive?

£	p	£	p	£	p	£	p
---	---	---	---	---	---	---	---

Ask 66

To all households

Ask all spenders

RECORD 84

66 Have you received any refund(s) of vehicle licence during the last 12 months?

VETAXREF (241) Q66 2.

Per No →	YTRPERNO (240 A) Q66 1	
----------	------------------------	--

Yes →	1	1	1	1
No →	2	2	2	2

Ask (a)  
Go to 67

(a) How much was (were) the refund(s)? VETXRFRAM (242) Q66 3 →

£	p	£	p	£	p	£	p
---	---	---	---	---	---	---	---

Ask 67

67 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?

RECORD 25

SEASONTK (245) Q67 1

Yes →	1
No →	2

Record details in grid below  
Go to 68

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 80 on income schedule)

RECORD 85

STPERNO (245A) Q67 2.

Per No	Item No	Mode of transport eg rail only bus only rail/bus/tube combined	Enter period code	If code 9 specify period	Amount paid		OFF USE
					£	p	
	STLT (245B) Q67 3	TRAIN ONLY - 1	(245C) Q67 4		STAMT (245D) Q67 5		STM OOE (245E) Q67 6
	STLT (245B) Q67 3	TUBE ONLY - 2	50				
	STLT (245B) Q67 3	TRAIN+TUBE - 3	4				
	STLT (245B) Q67 3	BUS ONLY - 4					
	STLT (245B) Q67 3	BUS+TUBE - 5					
	STLT (245B) Q67 3	TRAIN+BUS - 6					
	STLT (245B) Q67 3	TRAIN,BUS,TUBE - 7					
	STLT (245B) Q67 3	OTHER - 8					

Ask 68

67

To all households

Ask all spenders

CREDCARD

(210 A)

Q681

Per. No.

Yes

No

Use separate column for each person						
Per. No.						
Yes	1	1	1	1	1	1
No	2	2	2	2	2	2

Ask 69

68 Do (any of) you at present have a credit card such as Access, American Express, Barclaycard, Diners Club, Trustcard, etc?

CREDCARD (210 B)  
Q682

DO NOT KEY

Q.69-72

Code all that apply using separate column for each arrangement

Use separate column for each arrangement							
Per. No.							
	No	Yes	Yes	Yes	Yes	Yes	Yes
Individual Prompt							
a bank for a personal loan, (that is a loan given originally for specific goods or services)?	X	1	1	1	1	1	1
a finance house?	X	2	2	2	2	2	2
an organisation granting a second mortgage?	X	3	3	3	3	3	3
your employer as repayments of a loan?	X	4	4	4	4	4	4
<i>(Include repayments deducted from salary)</i>							
70 Are (any of) you at present paying instalments under a hire purchase or credit sale agreement?	X	1	1	1	1	1	1
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	1	1	1	1	1	1
Individual Prompt Any other shop running a club?	X	2	2	2	2	2	2
A Mail Order club as an agent or through a friend or relative?	X	3	3	3	3	3	3
Any other Mail Order organisation?	X	4	4	4	4	4	4
A Check Trader?	X	5	5	5	5	5	5
<i>Exclude loans, h.p. and credit sale</i>							
Other person or organisation?	X	6	6	6	6	6	6
Specify .....							
.....							
<i>Exclude credit card arrangements</i>							
72 Have (any of) 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

Ask 72

Reprompt 69-71 and specify type of arrangement in next column

Interviewer note

Check back to 69 to see if 73 applies  
 Check back to 70 to see if 74 applies  
 Check back to 71 to see if 75 applies  
 Check back to 68 to see if S836C to be left with informant

To all spenders with instalments coded 1 4 of 69

Use separate column for each item/service			
LPERSNO (272)	Q73 1		
Per No →	1	2	3
LITEMNO (272A) Q732	Item No →		
LOAN CODE (272B) Q73 3	Code from 69 →		
LOAN AMT (274) Q73 A	£	p	£
73 (a) How much was the loan? Exclude interest			
LOAN REP (275) Q73 B			
(b) How much was your last repayment on the loan?			
(c) How long a period did this cover?	PERC275 (276)	Q73 C	
Enter period code →			
LOAN DAT (282) Q73 O1	Month →		
Enter month and year as two digit code			
Year 19			
(i) How many repayments did you originally agree to pay?	LINSTA LN (283)	Q73 O2	
LORIG PAY (284) Q73 O3			
(ii) How much was the originally agreed repayment?			
(iii) How often did you originally agree to make each payment?	PERC284 (285)	Q73 O4	
Enter period code →			
(e) What items or services did you obtain with the loan?	OFF USE		
Use a separate column for each item/service covered by loan	OFF USE		
(f) Was the item new or second hand?	LNO ITEM (278) Q73 F		
New	1	1	1
S/hand	2	2	2
DNA	3	3	3
(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)?	LCASH P (279) Q73 H		
Include Down payment Part exchange			
(i) How much was allowed in part exchange?	LPARTEX (280) Q73 i		
(j) How much if anything did you have to put down in addition to the amount borrowed? (exclude part exchange)	LOAN DEP (281) Q73 J		

LITEMNO (272A) Q732  
LOAN CODE (272B) Q73 3  
Suggest consulting agreement or payments card before asking 73

LOAN AMT (274) Q73 A  
73 (a) How much was the loan? Exclude interest  
LOAN REP (275) Q73 B  
(b) How much was your last repayment on the loan?

LOAN DAT (282) Q73 O1  
Enter month and year as two digit code  
Year 19

(i) How many repayments did you originally agree to pay?  
LORIG PAY (284) Q73 O3  
(ii) How much was the originally agreed repayment?

(iii) How often did you originally agree to make each payment?  
(e) What items or services did you obtain with the loan?

(f) Was the item new or second hand?  
LNO ITEM (278) Q73 F  
New  
S/hand  
DNA

(h) How much was the cash price of (the goods or service)?  
LCASH P (279) Q73 H  
Include Down payment Part exchange

(i) How much was allowed in part exchange?  
LPARTEX (280) Q73 i

(j) How much if anything did you have to put down in addition to the amount borrowed? (exclude part exchange)  
LOAN DEP (281) Q73 J

- Ask (b)  
Ask (c)  
If code 9, specify period  
If more than 3 months before interview go to (a)-(j)  
If less than 3 months before interview ask (i)-(iv) then (e)-(j)

LTEMPUR (277) Q73 E1  
LQUAL (277A) Q73 E2

Ask 74

Loan details		Specify documents	
Interviewer to code whether documents	Seen by interviewer	1	
	Consulted by informant	2	
	Not consulted	3	

PERIOD CODES			
Week	1	Three months	6
Two weeks	2	Six months	7
Three weeks	3	Year	8
Four weeks	4	Other period	9
Cal month	5		

To all spenders with instalments coded 1 at 70

Use separate column for each item/service				
HPPERS	NO (287)	Q74 i		
1	2	3	4	

HPITEMNO (287A) Q74 2

Suggest consulting agreement or payments card before asking 74

Note: Where a downpayment (or part exchange) has been made but instalment not yet paid, please complete all questions except 74(e) and (f).

74 (a) What (items or services) did you obtain under the hire purchase/credit sale agreement?

HPITEMA (288) Q74A1  
HPQUAL (288A) Q74A2

Item/service				
OFF. USE	7			
OFF. USE	7			

(b) What is the type of firm from which the item or service was obtained?

(c) Did you buy it new or second hand? HPNEWOLD (289) Q74 c

New	1	1	1	1
S/hand	2	2	2	2
DNA	3	3	3	3
	E	p	E	p

(d) How much was the cash price of (the item/service)? HPCASH PR (290) Q74 D

--	--	--	--	--

Exclude: Interest  
Include: Down payment  
Part exchange

(e) How much was the last instalment you actually paid? HPINSTAL (291) Q74 E

--	--	--	--	--

(f) How long a period did this instalment cover? PERC (291) (292) Q74 F

PERC (291)	(292)	Q74 F		
------------	-------	-------	--	--

If code 9, specify period

(g) When did you obtain the item or service? HPDAT (293) Q74 G

Month				
Year, 19				

If obtained within last 3 months, ask (h)-(l), others go to 75

(h) How much was allowed in part exchange? HPPARTEX (294) Q74 H

--	--	--	--	--

(i) How much was the down payment (excluding part exchange allowed)? HPDEPOS (295) Q74 I

--	--	--	--	--

(j) How many instalments did you originally agree to pay? HPORIGIN (296) Q74 J

--	--	--	--	--

(k) How much was the originally agreed instalment? HPORIGPA (297) Q74 K

--	--	--	--	--

(l) How often did you originally agree to pay each instalment? PERC 297 (298) Q74 L

PERC 297	(298)	Q74 L		
----------	-------	-------	--	--

If code 9, specify period

See 75

Credit details

Specify documents

Interviewer to code whether documents	Seen by interviewer	1
	Consulted by informant	2
	Not consulted	3

**RECORD 79**

To all spenders with arrangements coded 1 6 at 71

27

Use separate column for each arrangement

Per No	CLUBFEAS (300)	Q75 1		
Item No	→ 1	2	3	4
Code from 71	CLUBCO DE (300)	Q75 3		
75 (a) What is the name of the firm to which your payments are made (through an agent)?				
	£	p	£	p
(b) How much was your last payment?	→			
(c) How long a period did this payment cover?	Enter period code	PERC302 (303)	Q75c	
(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 →	1	1	1
	No →	2	2	2

CLUBITNO (300A) Q75 2

CLUBLAPA (302) Q75B

CLUBGLM (304) Q7501

If 'Yes', complete box below using a separate line for each item obtained. If 'No' ask 76

**RECORD 80**

Per No	Item No	Code from 71	Description of goods obtained Name as far as possible. If clothing state whether for adult or child. If sex of child give age.	Date obtained		Cash price		OFFICE USE
				Day	Month	£	p	
	1							
	2							
	3							
	4							
	5							
	6							
	7							
	8							
	9							
	10							

CLUBGPNO (304A) Q75 02.

CLUB GINO (304) Q75 D3

CLUB FTYP (306) Q75 D4

CLUB DAT (305) Q75 D5

CLUB SCOS (307) Q75 D6.

CLUB 1fut (308) Q75 D7

CLUBQUAL (308A) Q75 D8

**PERIOD CODES**

Week	1	Four weeks	4	Six months	7
Two weeks	2	Cal month	5	Year	8
Three weeks	3	Three months	6	Other period	9

Ask 76

To all households

Ask all spenders

RECORD 25

BANKACS (309) Q761

76 Do (any of) you have current accounts or bank budget accounts?

Yes  1  
 No  2

- Ask (a) + (b)  
 - Go to 77

RECORD 81

Use separate column for each account and person

BANK	PNO	(309A)	Q762.
------	-----	--------	-------

BANK ITNO (309B) Q763

Per. No. Item No.

1	2	3	4
---	---	---	---

(a) Do you have a current account?  a bank budget account?

BAC TYPE (309C) (Q76A) 1 2

- Ask (b) for each account

Prompt: All current and bank budget accounts at high street banks and National (Post Office) Giro

BANKSERC (310) Q76B1

(b) Have you paid any bank service charges on any of these accounts in the last 12 months?

Yes  1 1 1 1  
 No  2 2 2 2

- Ask (i) and (ii)  
 - Go to 77

(i) How much were your bank service charges, excluding interest, from this account in the last 12 months, that is since.....?

£	p	£	p	£	p	£	p

Include all accounts

BANSCAMT (312) Q76B2

(ii) Was any part of this amount for business purposes?

BSCBUSP (313) Q76B3

Yes  No

1	1	1	1
2	2	2	2

- Ask (ai)  
 - Go to 77

(ai) About what proportion would be for business?

%

BSCBUS PR (315) Q76B4
-----------------------

- Ask 77

77 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?

RECORD 25

Yes  1  
 No  2

Record details in grid below  
 - Go to 78

BANKSTOR (316) Q771

Exclude credit transfers

RECORD 82.

Per. No.	Item No.	Purpose (Automobile Association membership, etc.)	OFF. USE	Enter period code	If code 9, specify period	£	p
	1						
	2		4	5			
	3		QT1	QT1			
	4		(318)	(318A)			
	5		UR	UA			
	6		ORP	ORQ			
	7		BST	PRC			
	8		BST	ORQ			
	9						

BSTORPNO (316A) Q772

BSTORITN (316B) Q773

- Ask 78

To all households

(Ask hoh or wife)

RECORD 25

78 Has any member of your household acquired anything free of charge on prescription during the past seven days ending yesterday?

PRES (319A) Q78

Yes  
No

2
---

- Ask (a) & (b)  
- Go to 79

Exclude items acquired on prescription season tickets

RECORD 91.

(a) Who acquired the items?

Per No

PRESNO	(319B)	Q78A	
PRESNO	(320)	Q78B	

(b) How many items did they acquire?

79 Has any member of your household had any free welfare milk during the past seven days ending yesterday?

RECORD 25.

FREEWELF (321)

Yes  
No

Q79

1
2

- Ask (a) & (b)  
- Go to 80

RECORD 92.

(a) Who received the milk?

Per No

WELFRNO	(321A)	Q79A	
WELFMI	LK (322)	Q79B	

(b) How many pints did they receive during the seven days ending yesterday?

80 Has any member of your household had any free school milk during the past seven days ending yesterday?

RECORD 25.

FRSCMILK (322A)

Yes  
No

Q80

2
---

- Ask (a) & (b)  
- See 81

RECORD 93.

(a) Who received the milk?

Per No of child

SCHMFRNO	(322B)	Q80A	
SCHMILK	(323)	Q80B	

(b) How many pints did they receive during the seven days ending yesterday?

- See 81



RECORD 25

To all with children at state schools

DNA. No state school children

N

- Go to 83

81 Have any of your children at state schools had any school meals during the past 7 days ending yesterday?

SCHMEALS (324)

Q 81

Yes → 1  
No → 2

- Ask (a)-(c)  
- Go to 82

RECORD 94

(a) Which child? → Per. No. of child

SMPERNO (324A)	Q81A		
----------------	------	--	--

(b) How many meals has each child had?

SMNOHD LW (324B)	Q81B		
------------------	------	--	--

(c) Were the meals free? SMFREE (324) Q81c

Yes → 1	1	1	1
No → 2	2	2	2

- Go to 82  
- Ask (d)

(d) During the last seven days did you pay for any of the meals? SMPAIDLW (328) Q81D1.

Yes → 1	1	1	1
No → 2	2	2	2

- Ask (I) & (II)  
- Go to 82

(I) How much did you pay for each child during the past seven days ending yesterday? SMPDAMT (329) Q81D2

£	p	£	p	£	p	£	p
---	---	---	---	---	---	---	---

(II) How many meals does this cover? SMNDPDLW (330) Q81D3

SMNDPDLW (330)	Q81D3		
----------------	-------	--	--

- Ask 82

Include: school cafeteria and fixed priced meals  
Exclude: school tuck shop

RECORD 25

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? RECORD 96

SCHTRAV (331)

Q82.

Yes → 1  
No → 2

- Ask (a)-(b)  
- Go to 83

(a) Which child? → Per. No. of child

SCTRANO (331A)	Q82A		
----------------	------	--	--

(b) Did he/she travel free? SCTRFREE (331B) Q82B

Yes → 1	1	1	1
No → 2	2	2	2

- Go to 83  
- Ask (c)

(c) During the past seven days ending yesterday did you actually pay for any of the travel? STPAIDLW (331C) Q82C1

Yes → 1	1	1	1
No → 2	2	2	2

- Ask (I) & (II)  
- Go to 83

(I) How much did you pay for each child during the past seven days ending yesterday? STPAYM (333) Q82C2.

£	p	£	p	£	p	£	p
---	---	---	---	---	---	---	---

(II) How many days does this cover? STDAYCOV (333A) Q82C3

STDAYCOV (333A)	Q82C3		
-----------------	-------	--	--

- Ask 83

To all households

Ask all spenders

RECORD 25

GRANTS (335)

Q83

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 \_\_\_\_\_  
No \_\_\_\_\_

1
2

- Ask (a)  
- Go to 84

Exclude parental contribution

RECORD 83.

Use separate column for each grant and person							
GRANT	PNO	(336)	Q33A1				
(a) Who is/was receiving the grant _____ Per No							
GRITEMNO (336A) Q83A2							
1	2	3	4				
(b) Is/was the source of the grant							
GRANTSOU (337) Q83B							
State?	1	1	1	1			
Private?	2	2	2	2			
Overseas?	3	3	3	3			
£	p	£	p	£	p	£	p
(c) What is/was the current annual value of the grant excluding fees? GRVEXFE (338) Q83C							
(d) What is/was the current annual value of the grant including fees? GRVINCF (339) Q83D							
(e) Are you (or your children) still receiving the grant or scholarship? GRANTSRE (340) Q83E							
Yes	1	1	1	1			
No	2	2	2	2			
(f) How much of this was/is being/will be paid direct to you (or your children) by cash or cheque? GRANTDIR (341) Q83F							
(g) Is the grant for attendance at a state or private establishment? ESTTYPE (342) Q83G							
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? CORTYPE (343) Q83H							
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

To all 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 to 24 and currently living away from home and receiving full- or part-time education, enter details at 87-92.

(a) Have you paid any fees or maintenance for any educational courses at any level but excluding leisure classes?

RECORD 25

EDUCFEES (344) Q84A1.

Yes -> 1 - Ask (i)-(vi)
No -> 2 - Go to (b)

RECORD 97

Use separate column for each course and person

Table with columns: EDUCNO (344A) Q84A2

(i) Who is/was attending the course? -> Per. No.

EDUCITNO (344B) Q84A3 -> Item No.

Table with columns: 1, 2, 3, 4 and rows: £, p, £, p, £, p, £, p

(ii) What was the annual amount paid? -> EDUCFAMT (345) Q84A4

Table with 4 columns for annual amount

(iii) Is/was the course at a state or private establishment? -> State? Private? -> EDCESTTY (346) Q84A5

Table with columns: 1, 2, 1, 2, 1, 2, 1, 2

(iv) Is/was the course you (or your children) are/were attending

EDUCCO TY (346A) Q84A6 -> Up to and including 'A' level, Above 'A' level, DK?

Table with columns: 1, 2, 3, 1, 2, 3, 1, 2, 3, 1, 2, 3

(v) What is the name of the examination you (or your children) will take?

Table with 4 columns for examination name

(vi) Are you (or your children) currently attending the course? -> EDUCSTAT (346B) Q84A7

Table with columns: 1, 2, 1, 2, 1, 2, 1, 2

(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?

RECORD 98

RECORD 25

LEISCFEE (347) Q84B1

Yes -> 1 - Ask (i)-(v)
No -> 2 - Go to (85)

Use separate column for each course and person

Table with columns: LEISCP NO (347A) Q84B2

(i) Who is/was attending the course? -> Per. No.

LEISCITN (347B) Q84B3 -> Item No.

Table with columns: 1, 2, 3, 4 and rows: £, p, £, p, £, p, £, p

(ii) What is the total amount paid in the last 12 months? -> LEISCAMT (348) Q84B4

Table with 4 columns for total amount

(iii) Is/was the course: At a state establishment? At a private establishment? or an individual giving private tuition? -> LEISCEST (349) Q84B5

Table with columns: 1, 2, 3, 1, 2, 3, 1, 2, 3

(iv) What is the subject being studied? -> LEISCSAT (349A) Q84B6

Table with 4 columns for subject

(v) Are you (or your children) currently attending the course? -> LEISCSAT (349A) Q84B6

Table with columns: 1, 2, 1, 2, 1, 2, 1, 2

To all households

Ask all spenders

RECORD 25

PTCOURSE(349B).

Q85

Yes →  1  
 No →  2

- Ask (a)-(c)  
- See 86

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?

RECORD 99.

(a) Who is attending the course? → Per No

PTITEMNO(349D) Item No  
Q85A2

PTPERNO (349C)	Q85A1		
1	2	3	4
1	1	1	1
2	2	2	2
3	3	3	3

(b) Is the course  
 PRTYPE(349E) Q85B  
 Up to and including 'A' level →  
 Above A level →  
 DK? →

(c) What is the name of the examination you will take?

- See 86

RECORD 100

To all households with a member aged 14-18 who is coded 4 (state secondary) or 7 (non-advanced further education up to 'A' level) at Q 6, front page

DNA. Others aged below 14 or over 18 →  N - Go to 87

TVEITNO (349G) Item No  
Q862

86 Is the course you (or your children) are attending part of the technical and vocational educational initiative?

TVEI(349H) Yes →  
 No →  
 DK →  
 Q863

TVEIPNO (349F)	Q861		
1	2	3	4
1	1	1	1
2	2	2	2
3	3	3	3

- Ask 87

Ask all spenders

Educational income and expenditure for non household members

OUTGRANT(350) Q 87

87 Have you a child aged 16 to 24 outside this household who is currently receiving full or part-time education?

Yes -> 1 - Ask (a)-(f)
No -> 2 - Go to 83

RECORD 28

Table with 4 columns (31-34) and 1 row: Use separate column for each course and person

(a) Ring person number OSPERSNO(351) Q 87A

(b) Enter relationship to HOH

Table with 4 columns and 1 row: \* OS PER HOH(355) Q 87 B. OFF. USE

\* CODING FRAME AS AT Q02 PAGE A01

(c) Sex OS PERSEX (352) Q 87c
Male -> 1
Female -> 2

Table with 4 columns and 2 rows: 1 1 1 1 / 2 2 2 2

(d) Age now OS PERAGE (353) Q 87d

Table with 4 columns and 1 row: (empty)

(e) Full or part-time education OS PEREST (354) Q 87E
Full time -> 1
Part time -> 2
DK -> 3

Table with 4 columns and 3 rows: 1 1 1 1 / 2 2 2 2 / 3 3 3 3

(f) Enter person number of parent/guardian giving details at (a)-(e) OSPARENT (356) Q 87F

Table with 4 columns and 1 row: (empty)

88 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? OSEDFAMT (365) Q 88A
Yes -> 1
No -> 2

Table with 4 columns and 2 rows: 1 1 1 1 / 2 2 2 2

(i) What was the annual amount paid? OSEDCFEE (364) Q 88A1

Table with 4 columns and 1 row: (empty)

(ii) Was the course at a state or private establishment? OSEDESTT (366) Q 88A2
State -> 1
Private -> 2

Table with 4 columns and 2 rows: 1 1 1 1 / 2 2 2 2

89 Has your child received any education grants, maintenance grants or scholarships during the last 12 months, that is since ...? Yes/No? OSGRANTR (357) Q 89

Table with 4 columns and 2 rows: 1 1 1 1 / 2 2 2 2

(a) Is your child still receiving the grant or scholarship? OSGSREC (358) Q 89A
Yes -> 1
No -> 2

Table with 4 columns and 2 rows: 1 1 1 1 / 2 2 2 2

(b) Is/was the source of the grant ...? State? Private? Overseas? OGSOURCE (359) Q 89B

Table with 4 columns and 3 rows: 1 1 1 1 / 2 2 2 2 / 3 3 3 3

(c) What is/was the current annual value of the grant excluding fees? OQEXFEE (360) Q 89C

Table with 4 columns and 1 row: (empty)

(d) What was the current annual value of the grant including fees? OGINCFEE (361) Q 89D

Table with 4 columns and 1 row: (empty)

90 Is your child attending a ...? University? another state establishment? or private establishment? OSESTTYP (362) Q 90

Table with 4 columns and 3 rows: 1 1 1 1 / 2 2 2 2 / 3 3 3 3

91 Is the course ...? up to and including 'A' level? or above 'A' level? DK? ODCORTYP (363) Q 91

Table with 4 columns and 3 rows: 1 1 1 1 / 2 2 2 2 / 3 3 3 3

92 What is the name of the examination your child will take?

Table with 4 columns and 1 row: (empty)

To all households

Ask all spenders

RECORD 25

PAGE A35

Show prompt card A

BUSREF (363A) Q93

93 Do you have (have you had) any of these items of household expenditure, which you have mentioned refunded by your employer (main or subsidiary)?

Yes → 1 Ask (a)  
No to all → 2 Go to 94

(a) For each item refunded ask (i) and (ii) and enter details in grid below

RECORD 103

- (i) How much of the expenditure you mentioned did you have refunded?
- (ii) How long was the period covered by the refund?

Prompt amounts entered at relevant questions	Yes	No	Per No	Amount refunded		Period covered by refund	If code 9 specify period
				£	p		
Rent (18)	1	X					
Rates (24)	2	X					
Water/sewerage rates (29)	3	X					
Mortgage payment (33 or 36)	4	X					
Insurance on structure (42 or 43)	5	X					
Gas (53 60)	6	X					
Electricity (53-60)	7	X					
Telephone (49)	8	X					
	8	X					
Road fund tax (61(a) and 63(a))	9	X					
	9	X					
Vehicle insurance (61(d) and 63(d))	10	X					
	10	X					
Vehicle purchase (64 and 69-74)	11	X					
	11	X					

BUSEXPEN (435) Q93 1  
 BUSPERNO (435A) Q93 2  
 BUSERAMT (436) Q93 A 1  
 CPERCH36 (437) Q93 A 2

Week	1	Four weeks	4	Six months	7
Two weeks	2	Cal month	5	Year	8
Three weeks	3	Three months	6	Other period	9

Ask 94

To all households

Ask all spenders

Show prompt card B

94 Did anyone from outside the household give you the money to pay for any of the household expenditure you have mentioned?

RECORD 25

EXPQIVN (589A) Q 941

Yes  1  
No  2

- Ask (a)-(d)  
- Go to 95

RECORD 101.

Use separate column for each item and person																	
Per. No.		EXPQVP NO (589C) Q94 2															
Item No.		1				2				3				4			
(a) What was (were) the item(s) of expenditure?																	
(b) Who gave you the money for the .....																	
(c) How much was the amount .....		EXPQVITN (589C) Q 943															
(d) How long a period did this cover?		PERC590 (591)				Q940											

EXPQVITN (589C) Q 943  
EXPQVNAM (590) Q 94c  
PERC590 (591) Q 940

If code 9, specify period  
- Ask 95

95 Were any of the items of household expenditure which you mentioned paid direct by someone else outside the household?

RECORD 25 (EXPQDIR (591A) Q 951

Yes  1  
No  2

- Ask (a)-(d)  
- Go to 96

Exclude direct payment of bills by Supplementary benefit

RECORD 102.

Use separate column for each item and person																	
Per. No.		EXPDIR PN (591B) Q95 2															
Item No.		1				2				3				4			
(a) What were the items of expenditure?																	
(b) Who paid for the .....																	
(c) How much was the amount paid?		EXPQDIRIN (591C) Q 95 3															
(d) How long a period did this cover?		PERC592 (593) Q 950															

EXPQDIRIN (591C) Q 95 3  
EXPQDIRAM (592) Q 95c

If code 9, specify period  
- Ask 96

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Cal. month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

The information on this page should be obtained from local authority office and entered below

96 Gross Value of rateable unit(s) covering the household → **GRV (372) Q96** →

£	P
	00

97 Net Rateable Value of rateable unit(s) covering the household → **NRV (373) Q97** →

£	P
	00

98 Copy from valuation lists

Description (Flat, Shop with flat, house with garage etc)	Location in building

For all households containing men aged 65 and over and women aged 60 and over

DNA → 

N
---

 - Go to 100

99 What concessionary bus travel provisions are provided for OAP -

Free bus pass or permit	1	INA129 (374) Q99.	Ask 100 and go to next document - Ask (a) Ask 100 and go to next document
Half fare bus pass or permit	2		
Flat fare bus pass or permit	3		
Bus tokens or bus tickets	4		
Any other type of concessionary OAP bus pass? Specify	5		
No concessionary bus travel provision in area	6		

(a) Annual value of tokens/tickets → **CONBUSAM (375) Q99A** →

£	P

- Ask 100 and go to next document



To all households at end of record-keeping period (Ask hoh or wife)

100 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

X
Y

Specify special circumstances below

Go to next document

Specify special circumstances

IN CONFIDENCE

Family Expenditure Survey

CI									
Interviewer Use									
Area			Ser			Hid			

Check that these spenders have been asked these questions on S 836A 44-48 50, 61-77 81-94

Income Schedule  
AREANUMB(382)  
Q003

SERNUMB(383) Q004 HHNUMB(384) Q005

To all

Per No	Per No	Per No
PERSN	OB(385)	Q006

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	Y	Ask (a)
No	X	X	X	Go to (b)

(a) Are you

Working [ an employee (inc CP ACE t) ]  
[ self employed or employer ]

\*Employee includes all working regularly for an employer irrespective of hours worked per week (include short time working), directors of limited companies

\*\*Self employed includes all working regularly irrespective of number of hours worked per week, also include childminders

Exclude mail order agents and baby sitters

(b) Probe the situation and code below

Intending to work	Out of employment but seeking or about to start work (inc TOPS ATS YTS/YTP o)	3	3	3	Go to 4
	Out of employment because of sickness or injury but intending to seek or about to start work	4	4	4	
Not Working	Sick or injured but not intending to seek work	5	5	5	See 6
	Retired (incl Job Release Scheme)	6	6	6	Go to 5
	None of these	7	7	7	See 6

1	2	3	4	5	6	7

IN A201 (386) Q01

† 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)

To all Employees (code 1 at 1(a)) and Self-Employed (code 2 at 1(a))

Per. No.	Per. No.	Per. No.

2 For how many weeks have you done regular paid work in the last 12 months, that is since \_\_\_\_\_ ?

WKSWE	MP (381)	Q02
-------	----------	-----

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(a))

3 Have you been away from work today?

AWFRWRK (388)

Yes \_\_\_\_\_

No \_\_\_\_\_

1	1	1
2	2	2

Ask (a)

Go to 9

Probe to find out whether day of interview is a normal working day - if normal working day and away from work, code 1

Q03

(a) Have you been away from work for more than the last 3 working days?

AWLS3DAY (389)

Yes \_\_\_\_\_

No \_\_\_\_\_

Q03A

1	1	1
2	2	2

Ask (i)-(iii)

Go to 9

(i) What is the reason for your absence:

Running prompt

illness or accident \_\_\_\_\_

holiday \_\_\_\_\_

strike \_\_\_\_\_

other? \_\_\_\_\_

Q03A1 INA207 (390)	1	1
	2	2
	3	3
	4	4

Ask (ii)

Specify on left and ask (ii)

Per. No. .... Specify .....

Per. No. .... Specify .....

Per. No. .... Specify .....

(ii) Are you receiving

Running prompt

full pay from your employer? \_\_\_\_\_

part pay, or made up pay \_\_\_\_\_

no pay? \_\_\_\_\_

INA209 (391) Q03A2		
1	1	1
2	2	2
3	3	3

(iii) How many weeks in all have you been away from work during this spell of absence?

If less than one week, give days

NOWKSA	W (392)	Q03A3
--------	---------	-------

Go to 9

To all intending to work (coded 3 or 4 at 1(b))

Exclude students, school leavers yet to start first job

DNA Others

N	N	N
X	X	X

Go to 9

Go to 45

4 How many weeks is it since you did any regular paid work?

WKSSIN	CW (393)	Q04
--------	----------	-----

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

WkSWu	NEM (394)	Q04A
-------	-----------	------

Go to 9

To all retired (coded 6 at 1(b))

5 Have you retired in the last 12 months that is since

RETL12M (394A) Q05  
 Yes  No

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)  
 - Go to 45

(a) How much did you earn from your job (before tax) in the 12 months just before you retired?

RETEARN (396) Q05A

--	--	--	--	--	--

- Go to 45

To men aged under 65 and women aged under 60 and coded 5 or 7 at 1(b)

DNA Men 65 and over & Women 60 and over

INA217 (397) Q06

6 Are you prevented from seeking work because you are looking after a sick or aged relative?

Yes  No

1		1		1	
2		2		2	

- Go to 8  
 - Ask 7

7 (As far as you know) are you permanently unable to work?

INA221 (398) Q07

Yes  No

1		1		1	
2		2		2	

- Ask (a)  
 - Go to 8

(a) Could you tell me why you are permanently unable to work?

Per No Reason  
 Per No Reason  
 Per No Reason

8 Have you done any regular paid work during the last 12 months that is since

REGWORK (399) Q08

Yes  No

1		1		1	
2		2		2	

- Ask (a)-(c)  
 - Go to 45

(a) For how many weeks did you work?

Include Paid holiday, paid sick leave  
 Exclude strike periods

REGWKS (399A) Q08A

(b) What wage/salary did you usually receive each time you were paid after all deductions?

REGPAY (400) Q08B

--	--	--	--	--	--

(c) How often were you usually paid?

Weekly   
 Fortnightly   
 Four weekly   
 Calendar monthly   
 Some other period

1		1	
2		2	
4		4	
5		5	
9		9	

- Go to 45

If code 9, specify period

- Go to 45

Per No.	Per No.	Per No.
N	N	N

To all employees (coded 1 at 1(a))  
 self employed (codes 2 at 1(a))  
 unemployed (coded 3 or 4 at 1(b))

DNA Codes 5,  
 6, or 7 at 1(b)

- Go to 45

9 Do did you have more than  
 one job (for pay or profit)?

one job only

more than one job

Y	Y	Y
X	X	X

- Enter details at (a)

- Enter details at (a)  
 then (b)

If coded  
 1 or 2  
 at 1(a)

List all jobs at which informant is currently  
 working and has already been paid except for  
mail order agents and baby sitters.

If an employee and currently working at time of  
 interview and not yet paid (i.e. new job) give  
 details of current job (and anticipated pay at 10  
 etc.)

If coded  
 3 or 4  
 at 1(b)

If unemployed and intending to work give  
 details of last job and pay at 10, 38 etc

(a) Most remunerative job

Per. No. ....

Occupation .....

Industry .....

(occupation)  
 OCCUP(402) Q09A1

OFF. USE

(INDUSTRY)  
 INA211(403) Q09A2

OFF. USE

INA246(404)  
 Q09A3 Director

1

Code  
 employment  
 status below

Per. No. ....

Occupation .....

Industry .....

OFF. USE

OFF. USE

1

Director

Code  
 employment  
 status below

Per. No. ....

Occupation .....

Industry .....

OFF. USE

OFF. USE

1

Director

Code  
 employment  
 status below

WORKSTAT (405)

Employee Q09A4

Self employed

1	1	1
2	2	2

- See (b)

(b) Subsidiary job

Exclude mail order agents and baby sitters

DNA →

Per No	Per No	Per No

N	N	N
---	---	---

See 10 or 38

Per No

Occupation

Industry

Code employment status below

Director →

1

INA 271(406)  
Q09B1

Per No

Occupation

Industry

Code employment status below

Director →

1

Per No

Occupation

Industry

Code employment status below

Director →

1

SUBWKSTA (401) Q09B2

Employee →

1	1	1
2	2	2

Self employed →

See 10 or 38

To all employees (coded 1 at 1(a))  
all unemployed (coded 3 or 4 at 1(b))

Per No	Per No	Per No

Most remunerative job (coded 1 at bottom of 9(a))

DNA. Coded 2, 5-7 at 1

£	p	£	p	£	p
N		N		N	

- Go to 38

10 On what date were you last paid a wage or salary?

Enter day, month & year  
as two digit numbers

Day

Month

Year. 19

PAY DAY		
(408)		
Q10		

If more than  
a year ago,  
no further  
details required  
Go to next  
job or 45

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?

PAY AMT	(409)	Q11
---------	-------	-----

12 How long a period did your  
last wage or salary cover?

- Week
- Fortnight
- Four weeks
- Calendar month
- Some other period

(410) Q12	PERCH09	1	1
		2	2
		4	4
		5	5
		9	9

- Specify period

13 Did this include a refund of income tax?

TAX REF (411)

Q13

- Yes
- No

1	1	1
2	2	2

- Ask (a)

- Go to 14

(a) How much was the refund?

TAX REF AM (411A)

Q13A

--	--	--

14 How much was deducted for  
income tax under PAYE?

NOTAX (412A) Q141  
No tax deducted

TAX (412)	(Q14)	
-----------	-------	--

If no tax deducted  
code below, then  
ask (a); others go  
to 15

(a) Do you usually pay any tax?

Yes

TAX USUAL (413)

No

Q14A

1	1	1
2	2	2

Specify on  
left reason  
why tax  
not paid

- Ask 15

Per. No. .... Specify reason

Per. No. .... Specify reason

Per. No. .... Specify reason

15 How much was deducted as National Insurance  
contribution?

MINO (414)

Q15

No N.I. deductions

MONINO (414A)

Q151

(a) Do you usually pay  
National Insurance contributions?

Yes

NI USUAL (414B)  
Q15A

1	1	1
2	2	2

If no N.I.  
deducted, code  
below then ask  
(a); others go to  
16.

- Go to 16

Most remunerative job (continued)

16 Were there any other deductions from your wage salary such as superannuation union fees Friendly Society sports clubs specialised pastimes or charities?

		Per No	Pa No	Per No
		£	p	£ p
DEDUCTS(414C) Q16		1	1	1
Yes		2	2	2
No				
DEOSUP(415A) Q161		1	1	1
Superannuation	DEOSUPAM(415B) Q16 2			
DEOUF(415C) Q16 3		2	2	2
Union fees	DEOUFAMT(415D) Q16 4			
DEDFS(415E) Q16 5		3	3	3
Friendly societies	DEDFSAMT(415F) Q16 6			
DEDESC(415G) Q16 7		4	4	4
Sports clubs and specialised pastimes	DEDESCAMT(415H) Q16 8			
DEOCH(415I) Q16 9		5	5	5
Charities	DEOCHAMT(415J) Q16 10			
DEOOTH(416A) Q16 11		6	6	6
Other deductions	DEONEAM(416B) Q16 12			
DEONE TY(416C) Q16 13				OFF USE
DEONE QU(416D) Q16 14				OFF USE
DEOTWOPAM(416E) Q16 15				
DEOTWOTY(416F) Q16 16				OFF USE
DEOTWOU(416G) Q16 17				OFF USE
DEOTHRAM(416H) Q16 18				
DEOTHRTY(416I) Q16 19				OFF USE
DEOTHRQU(416J) Q16 20				OFF USE
INA 235 (417) Q16 4 A.		1	1	1
consulted by interviewer		2	2	2
consulted by informant		3	3	3
not consulted		4	4	4
Was other pay slip consulted				
GROSSPAY(418) Q16 A1				

Record details below  
Go to 16(a)

Specify below and enter amounts

Per No	Purpose of deduction
	DEONEAM(416B) Q16 12
	DEOTWOPAM(416E) Q16 15
	DEOTHRAM(416H) Q16 18

(a) Interviewer to code  
Was the pay slip for the date shown at 10

consulted by interviewer  
consulted by informant  
not consulted

Was other pay slip consulted

Ask (i)  
See 17  
Ask (i)

(i) What was the gross wage salary including superannuation as shown on payslip?



Most remunerative job (continued)  
(coded 1 at 1(a), 3 or 4 at 1(b))

DNA. If unemployed for more than 13 weeks (see Q.4) →

Per No	Per No	Per No
£ p	£ p	£ p
N	N	N

Go to 21

17 Do you receive a mileage allowance or fixed allowance from your current (last) employer?

MALLREC (418A)  
Q17

Yes →  
No →

1	1	1
2	2	2

- Ask (a)  
- Go to 18

(a) Was any allowance for motoring included in the net pay of £..... (see 11) that you received on ..... (see 10)?

MALLINPAY (418B)  
Q17A

Yes →  
No →

1	1	1
2	2	2

- Ask (i)  
- Go to 18

(i) How much was included

MILEALL (440)  
Q17A1

--	--	--	--

18 (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)?

MOTEXREC (440A)  
Q18

Yes →  
No →

1	1	1
2	2	2

- Ask (i)  
- Go to 19

(i) How much was included

OTHMOTRE (442)  
Q181

--	--	--	--

Show prompt card A

19 Were there any refunds of household expenditure by your current (last) employer included in the net pay of £..... (see 11) that you received on ..... (see 10)?

HHEXPINC (442A)  
Q191

Yes →  
No →

1	1	1
2	2	2

Specify below and enter amounts  
- Go to 20

Per. No.	Describe what was covered by refund
	BUSERIN1 (439B) Q192 →
	BUSERIN2 (439C) Q193 →
	BUSERIN3 (439D) Q194 →


20 (In addition to the refunds you have already mentioned) did you receive any (other) refunds for business expenditure from your current (last) employer included in the net pay of £..... (see 11) that you received on ..... (see 10)?

OTHBUINC (439A)  
Q201

Yes →  
No →

1	1	1
2	2	2

Specify below and enter amounts  
- Ask 21

Per. No.	Describe what was covered by refund
	OTHBUSE1 (443A) Q202 →
	OTHBUSE2 (443B) Q203 →
	OTHBUSE3 (443C) Q204 →


Most remunerative job (continued)

(Coded 1 at 1(a) 3 or 4 at 1(b))

Per No	Per No	Per No
INA220	(419)	Q21
INA244	(420)	Q22.

21 How many hours a week do you usually work excluding meal breaks and all overtime?

22 On average how many hours (if any) paid overtime do you usually work in a week?

Ask 23

Most remunerative job (continued)

(Coded 1 at 1(a), 3 or 4 at 1(b))

Show prompt card C

23 Was your last wage or salary affected by any of the following:

- (a) Holiday pay or other pay in advance
- Back pay
- Different pay rate for unsociable hours/different shifts
- An occasional bonus
- Irregularly paid overtime
- Deductions from usual pay for N.I. Benefit received
- Tax refund
- Business refunds
- Tax adjustment for previous unemployment benefit/supplementary benefit received
- Absence from work because of sickness
- No to all

Per. No.	Per. No.	Per. No.
£	p	£
£	p	£
£	p	£
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11

PAY AFFEC (424) Q23A

- (b) Was your last wage or salary affected by anything else?
    - Yes
    - No
- Per. No. .... Specify
- Per. No. .... Specify
- Per. No. .... Specify

1	1	1
2	2	2

Specify on left and ask 24  
- Ask 24

OTH AFFEC (425) Q23B

24 Your last wage salary after all deductions was £ ..... (see 11). Is this the amount you usually receive (when at work)?

- Yes
- No

1	1	1
2	2	2

- Go to 25  
- Ask (a)-(c)

INA254 (426) Q24

- (a) What do you usually receive each time you are paid after all deductions?

--	--	--	--	--	--

- Ask (b)

USNETPAY (427) Q24A

and

- (b) What do you usually receive each time you are paid before all deductions?

--	--	--	--	--	--

- Ask (c)

USGROPAY (428) Q24B

- (c) How often are you usually paid?
  - Weekly
  - Fortnightly
  - Four weekly
  - Calendar monthly
  - Some other period

1	1
2	2
4	4
5	5
9	9

- Specify period and ask 25

PERC428 (429) Q24C

Most remunerative job (continued)  
(Coded 1 at 1(a) 3 or 4 at 1(b))

Per No	Per No	Per No

25 In the last 12 months have you received an occasional addition to pay such as Christmas or quarterly bonus or an occasional commission?

**BONUSES (430) Q25**

Yes    
 No

£	p	£	p	£	p
1		1		1	
2		2		2	

Specify below and enter amounts  
- See 26

Per No	Description
	BONUSAM1 (431A) Q251
	BONUSAM2 (431B) Q252
	BONUSAM3 (431C) Q253
	BONUSAM4 (431D) Q254


(a) Was this amount **BONBATA (432) Q25A** before tax  after tax?  DK

Running prompt

1	1	1
2	2	2
3	3	3

- See 26

To all whose last pay was not usual (coded 2 at 24)

DNA Others

N	N	N
---	---	---

- See 28

26 Did the usual net pay of £ (see 24(a)) include any of this bonus?

**BONUSPAY (432A) Q26**

Yes    
 No

1	1	1
2	2	2

- Ask (a)  
- Go to 27

(a) How much was included? **BONINUSP (433) Q26B**

--	--	--	--	--	--

Ask 27

27 Was any allowance for motoring included in your usual net pay of £ (see 24a)?

**MALLUSP (433A) Q27**

Yes    
 No

1	1	1
2	2	2

- Ask (a)  
- See 28

(a) How much was included? **MALLINNP (441) Q27A**

--	--	--	--	--	--

See 28

Most remunerative job (continued)  
(Coded 1 at 1(a), 3 or 4 at 1(b))

Per No		Per No		Per No	
£	p	£	p	£	p
N		N		N	

DNA. If unemployed for more than 13 weeks (see Q 4)

See 32

28 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?

**TAXRELAL (441A)**  
 Yes **Q28** →  
 No →

1	1	1
2	2	2

Ask (a)  
Go to 29

(a) What is the amount on which tax relief will be allowed?  
**TAXRELF (434) Q28A** →

--	--	--	--	--	--

Ask 29

29 Do you receive any luncheon vouchers from your current (last) employer?  
**LV (434A) Q 29**  
 Yes →  
 No →

1	1	1
2	2	2

Ask (a)  
Go to 30

(a) Have you used any luncheon vouchers in the last 7 days?  
**LVUSED (434B) Q29A**  
 Yes →  
 No →

1	1	1
2	2	2

Ask (i)-(ii)  
Go to 30

(i) How many have you used in the last 7 days?

<b>LVNOS (444)</b>	<b>Q29A1</b>
--------------------	--------------

(ii) What was the value of each voucher used?

<b>LVVAL (445)</b>	<b>Q29A2</b>
--------------------	--------------

30 Have you received any free meals from your employer in the last 7 days?  
**FREE MEAL (445A) Q30**  
 Yes →  
 No →

1	1	1
2	2	2

Ask (a)  
Go to 31

(a) How many free meals have you received in the last 7 days?

<b>EMPFRE EM (446)</b>	<b>Q30A</b>
------------------------	-------------

31 Has your employer supplied you with any free food e.g. milk, potatoes, in the last 7 days?  
**EMPFREEF (447) Q31**  
 Yes →  
 No →

1	1	1
2	2	2

Ask (a)  
Go to 27

(a) What was the free food supplied in the last 7 days, and how much was supplied?

Milk (gallons) →

<b>EMPFM 11x (448)</b>	<b>Q31A1</b>
------------------------	--------------

Eggs (dozens) →

<b>EMPFEG GS (449)</b>	<b>Q31A2</b>
------------------------	--------------

Potatoes (cwts) →

<b>EMPFPT S (450)</b>	<b>Q31A3</b>
-----------------------	--------------

**EMPFOTH (451) Q31A4** Other →

1	1	1
---	---	---

Specify on left

Per. no. specify food quantity

OFF USE	<b>EMPFVAL (452A) Q31A5</b>		
---------	-----------------------------	--	--

Per. no. specify food quantity

OFF USE	<b>EMPROVA 2 (452B) Q31A6</b>		
---------	-------------------------------	--	--

Per. no. specify food quantity

OFF USE	<b>EMPROV A3 (452C) Q31A7</b>		
---------	-------------------------------	--	--

See 32

Ask all those with subsidiary employment as employee (coded 1 at bottom of 9(b))

Per No	Per No	Per No

DNA - no subsidiary employment as employee

E	p	E	p	E	p
N		N		N	

- See 38

32 On what date were you last paid a wage or salary?

**SUBDAT (453) Q32**

Enter date as two digit figures

Day  
Month  
Year 19


Ask 33

33 What was your wage/salary including overtime bonus commission or tips after all deductions the last time you were paid?

**SUBSIOPY (454) Q33**

--	--	--	--

Ask 34

34 How long a period did this cover?

**PERCH54 (455) Q34**

Week  
Fortnight  
Four weeks  
Calendar month  
Some other period

1	1	1
2	2	2
4	4	4
5	5	5
9	9	9

- Specify period

35 Were any deductions made from your pay before you received it?

**SUBSOEDS (455A) Q35 1**

Remise composite deductions

**SUBSTAX (456) Q35 2**

Income tax under PAYE

**SUBTAXAM (456A) Q35 3**

**SUBSNI (457) Q35 4**

National Insurance contributions

**SUBNIAM (457A) Q35 5**

Other deductions **SUBSOth (458) Q35 6**

Yes

No

Ring code and enter amount

Ring code and enter amount

Code

1	1	1
2	2	2
1	1	1
2	2	2
3	3	3

Ask 35

- Record details below  
- See 36

Specify below and enter amounts

Per No	Purpose of deduction
	<b>SUBONEAM (458A) Q35 7</b>
	<b>SUBTWOAM (458B) Q35 8</b>
	<b>SUBTHRAM (458C) Q35 13</b>


36 What was your gross pay before all deductions including superannuation?

**SUBSGROS (461) Q36**

--	--	--	--

Ask 37

37 (In addition to the refunds you have already mentioned) did you receive any (other) refunds for business expenditure from your current (last) employer included in the net pay of £ you received on

**SUBBUSRE (461A) Q37 1**

(see 32)?

Yes  
No

1	1	1
2	2	2

Specify below and enter amounts - See 38

Per No	Purpose of deduction
	<b>SUBSBUS1 (462A) Q37 2</b>
	<b>SUBSBUS2 (462B) Q37 3</b>


5 2

To all self employed (coded 2 at 1)\*

\*Include unemployed (coded 3 or 4 at 1(b)) whose last job was as self-employed.

Exclude mail order agent or babysitter (see 81)

Per. No.	Per. No.	Per. No.

£	p	£	p	£	p
N		N		N	

DNA not self employed →

- Go to 45

38 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, N.I. contributions or money drawn for your own use?

SEPROAT (464)  
Q38 1

Profit →

--	--	--	--	--	--

- Go to 41

SENILPRO (464A)  
Q38 2

Nil Profit →

1		1		1	
---	--	---	--	---	--

SELOSS (470A)  
Q38 3

Loss →

--	--	--	--	--	--

- Go to 39

Income covering less than a year is acceptable if business is newly established

SEPRLOOK (470B)  
Q38 4

DK →

1		1		1	
---	--	---	--	---	--

SESUBINC (471) Q38 5

						OFF. USE
--	--	--	--	--	--	----------

\* SESUBHRS (471A)  
Q38 6

						OFF. USE
--	--	--	--	--	--	----------

\* CODING FRAME

MORE THAN 30 HRS PER WEEK - 1

30 HRS PER WEEK OR LESS - 2.

To self employed -  
except those giving a profit at 38

30 Do you draw sums of money or cheques regularly  
from the business for your own use?

Per No	Per No	Per No

SEREGS(471B)Q39

Yes →  
No →

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)-(d)  
- Go to 40

SEREGSUM(465)Q39A

(a) How much on average do you take out each week/month?

--	--	--	--	--	--

SERSUMDK(465A)

DK →

1		1		1	
---	--	---	--	---	--

- Go to 40

Q39A1

(b) How long a period did this cover?

PERC465(466)

Enter period  
code →

7					
---	--	--	--	--	--

If code 9,  
specify period.

Q39B

(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?

SEDOM(466A)  
Q39c

Yes →  
No →

1		1		1	
2		2		2	

- Ask (i)-(ii)  
- Go to (d)

SEDOMBIL(467)Q39c1

(i) How much on average do you take out  
each week/month?

--	--	--	--	--	--

PERC467(468)Q39c2

(ii) How long a period did this cover?  
Enter period  
code →

--	--	--	--	--	--

If code 9,  
specify period.

SERESPR(468A)

(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?

Q3901

SERESNPR(468B)Q3902

Profit →

Nil profit →

--	--	--	--	--	--

1		1		1	
---	--	---	--	---	--

- Go to 42

SERESLOS(468c)Q3903

Loss →

SERESDK(468D)Q3904

DK →

--	--	--	--	--	--

1		1		1	
---	--	---	--	---	--

- Ask 40

PERIOD CODES -					
Week	-1	Four weeks	-4	Six months	-7
Two weeks	-2	Calendar month	-5	Year	-8
Three weeks	-3	Three months	-6	Other period	-9



To all self employed except those not self employed for last 13 weeks

Per No	Per No	Per No

DNA Not self employed for last 13 weeks (see Q 4)

N	N	N
---	---	---

Go to 45

Show prompt card D

44 What proportion of your expenditure relating to this accommodation only which you have already told me about have you claimed /will you be claiming as a business expense for tax purposes?

\* Where 38 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

Relating to this accommodation only

SEBUSEX1(478A)Q44 1

Vehicle expenses (61 63 64 68-75)

Ring code and enter %

1	1	1
SEBEP A1(479A) Q44 2.		

SEBUSEX2(478B) Q44 3

Rent (18)

Ring code and enter %

2	2	2
SEBEP CA2(479B) Q44 4		

SEBUSEX3(478C)Q44 5

Mortgage payments (33 or 36)

Ring code and enter %

3	3	3
SEBEP CA3(479C) Q44 6		

SEBUSEX4(478D)Q44 7

Rates (24)

Ring code and enter %

4	4	4
SEBEP CA4(479D) Q44 8		

SEBUSEX5(478E)Q44 9

Water/sewerage rate (29)

Ring code and enter %

5	5	5
SEBEP CA5(479E) Q44 10		

SEBUSEX6(478F)Q44 11

Insurance on structure (42 or 43)

Ring code and enter %

6	6	6
SEBEP CA6(479F) Q44 12		

SEBUSEX7(478G)

Gas (53-60)

Ring code and enter %

7	7	7
SEBEP CA7(479G) Q44 14		

SEBUSEX8(478H) Q44 13

Electricity (53-60)

Ring code and enter %

8	8	8
SEBEP CA8(479H) Q44 16		

SEBUSEX9(478I)Q44 17

Telephone (49)

Ring code and enter %

9	9	9
SEBEP CA9(479I) Q44 18		

SEBUSE10(478J) Q44 19

Anything else

Ring code and enter %

10	10	10
SEBEP CA10(479J) Q44 20		

Specify on left and see below

Per No Specify  
Per No Specify  
Per No Specify

SEBUSE11(478K) Q44 21

No expenditure claimed

11	11	11
----	----	----

See below

If subsidiary job as employee go back to 32

If subsidiary job as self employed ask 38 etc using margin at left for answers

Ask 45

10

To all  
Are you at present receiving any of these state benefits?  
Show prompt card 1

Per. No.	Per No	Per. No.

Exclude Supplementary benefit from 45 to 52  
Exclude Christmas bonus from 45 to 52

**45 Child benefit** **CHILDBEN (484A) Q45**

Include one parent benefit

Yes  →

No  →

£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a) & (b)  
Go to 46

(a) What was the amount of benefit you last received? **CHILDBAM (485) Q45 A** →

--	--	--	--	--	--

(b) How long a period did this cover? Enter period code → **PERC485 (486) Q45 B**

If code 9, specify period

**46 N.I. retirement pension** **NI PEN (487) Q46**

Old person's pension

Include additional pension

Yes  →

Yes  →

No to both  →

£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	

Ask (a) & (b)  
Go to 47

(a) What was the amount of benefit you last received? **NI PENAMT (488) Q46A** →

--	--	--	--	--	--

(b) How long a period did this cover? Enter period code → **PERC488 (489) Q46 B**

If code 9, specify period

**47 N.I. Widow's benefits** **NI WIDOWS (489A) Q47**

(Include earnings-related supplement)

Enter War Widow's benefit at 67

Yes  →

No  →

£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a) & (b)  
Go to 48

(a) What was the amount of benefit you last received? **NI WIDAMT (490) Q47 A** →

--	--	--	--	--	--

(b) How long a period did this cover? Enter period code → **PERC490 (491) Q47 B**

If code 9, specify period

**48 War disability pension and related State allowance** **WARDIS (491A) Q48**

Yes  →

No  →

£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a) & (b)  
Go to 49

(a) What was the amount of benefit you last received? **WARDISAM (492) Q48 A** →

--	--	--	--	--	--

(b) How long a period did this cover? Enter period code → **PERC492 (493) Q48 B**

If code 9, specify period

PERIOD CODES:-

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Calendar month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

Ask 49

57

To all  
Show prompt card 2

49 Mobility allowance **MOBILITY (493A) Q49**  
 Yes    
 No    
 - Ask (a) & (b)  
 - Go to 50

Per No	Per No	Per No
£ o	£ p	£ p
1	1	1
2	2	2

(a) What was the amount of benefit you last received? **MOBLAMT (494) Q49A**

--	--	--

(b) How long a period did this cover? Enter period code **PERCH4 (495) Q49 B**  
 If code 9, specify period

--	--	--

50 Severe Disablement Allowance **SEVDISAL (495A) Q50**  
 Yes    
 No    
 - Ask (a) & (b)  
 - Go to 51

Per No	Per No	Per No
£ o	£ p	£ p
1	1	1
2	2	2

(a) What was the amount of benefit you last received? **SEVDAMT (495B) Q50 A**

--	--	--

(b) How long a period did this cover? Enter period code **PERCH495 B (495C) Q50 B**  
 If code 9, specify period

--	--	--

51 Attendance allowance **ATTENDNC (498A) Q51**  
 Yes    
 No    
 - Ask (a) & (b)  
 - See 52

Per No	Per No	Per No
£ o	£ p	£ p
1	1	1
2	2	2

(a) What was the amount of benefit you last received? **ATTENDAM (499) Q51A**

--	--	--

(b) How long a period did this cover? Enter period code **PERCH99 (500) Q51 B**  
 If code 9, specify period

--	--	--

To all except HoH  
 52 Housing benefit rebate/allowance from your local authority or local DHSS office **HBNOTHOH (500A) Q52**  
 Yes    
 No    
 DNA, HoH    
 - Ask (a)-(c)  
 - Go to 53

Per No	Per No	Per No
£ o	£ p	£ p
1	1	1
2	2	2
3	-	-

(a) What was the amount of housing benefit/rebate/allowance you last received? **HBNOTAMT (500B) Q52 A**

--	--	--

(b) How long a period did this cover? Enter period code **PERC500 B (500C) Q52 B**  
 If code 9, specify period

--	--	--

(c) Did the amount you mentioned include Housing Benefit Supplement? **HBSNOT (500D) Q52c**  
 Yes    
 No    
 - Ask (l)  
 - Go to 53

Per No	Per No	Per No
£ o	£ p	£ p
1	1	1
2	2	2

(l) How much was included? **HBSNOTAM (500E) Q52c**  
 Ask 53

--	--	--

To all  
Show prompt card 3

Per. No.	Per. No.	Per. No.

53 In the last 12 months, that is since ..... **SSP (500F) Q53**  
have you received Statutory Sick Pay  
from your employer?

Yes    
No

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a) & (b)  
- Go to 54

(a) For how many weeks did you receive Statutory Sick Pay? **INA 278 (501) Q53A**

(b) Are you receiving Statutory Sick Pay at present? **INA 279 (503) Q53B**  
Yes    
No

1		1		1	
2		2		2	

(In addition to Statutory Sick Pay), have you received any of these State benefits in the last 12 months, that is since .....?  
**\* ENTER 1 IF S.S.P IN LAST PAY**

<b>INA 234</b>	<b>(503A)</b>	<b>Q53 B1</b>	OFF. USE
----------------	---------------	---------------	----------

Exclude Supplementary benefit from 54 to 55  
Exclude Christmas bonus from 54 to 55

54 N.I. sickness benefit

**NI SICK (504) Q54**  
Yes    
No

1		1		1	
2		2		2	

- Ask (a)-(d)  
- Go to 55

(a) For how many weeks did you receive this benefit? **INA 224 (505) Q54A**

(b) What was the amount of benefit you last received? **NI BEN (506) Q54B**


(c) How long a period did this cover? Enter period code **PERC506 (507) Q54C**

<b>PERC506</b>	<b>(507)</b>	<b>Q54C</b>

If code 9, specify period

(d) Are you receiving benefit at present? **INA 225 (508) Q54D.**  
Yes    
No

1		1		1	
2		2		2	

Ask 55

PERIOD CODES:-					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Calendar month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all

CONPEN (509) Q55

55 Contributory invalidity pension (Include invalidity allowance and additional pension)

Yes    
 No

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)-(d)   
 - See 56

(a) For how many weeks did you receive this benefit?

INA258	(S10)	Q55A
--------	-------	------

(b) What was the amount of benefit you last received?

CONBREC (S11)   
 Q55B

N					
---	--	--	--	--	--

(c) How long a period did this cover?

Enter period code

PERCS11	(S12)	Q55C
---------	-------	------

If code 9, specify period

(d) Are you receiving benefit at present?

Yes    
 No

INA259 (S13)   
 Q55D

1		1		1	
2		2		2	

To those coded Yes to 53 or 54 or 55

Others DNA

N		N		N	
---	--	---	--	---	--

- See 57

56 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

PAIDSICK (S14) Q56

1		1		1	
2		2		2	
3		3		3	

- Ask (a)   
 - See 57

(a) Are you being paid every week by your employer or Running prompt for only some of the weeks that you were receiving?

1		1		1	
INA272	(S15)	Q56A			
2		2		2	

- See 57   
 - Ask (i)

(i) For how many weeks are/were you being paid?

INA267	(S16)	Q56A1
--------	-------	-------

See 57

PERIOD CODES -					
Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Calendar month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

To all men aged under 66  
women aged under 61

Per No		Per No		Per No	
£	p	£	p	£	p
N		N		N	

GOVTRSCH (516A) Q 57

57 Have you taken part in a government training scheme in the last 12 months?

DNA: Others →

Yes →

No →

1	1	1
2	2	2

- Go to 58

- Ask (a)-(e)

- Go to 58

(a) Was it

Training Opportunities Scheme (TOPS) or Youth Training Scheme (YTS)?  
Other

INA246 (517)

Q 57A

1	1	1
2	2	2
3	3	3

- Specify on left

Per. No. .... Specify scheme .....

(b) For how many weeks did you take part in the scheme/programme?

INA 249	(518)	Q 57 B
---------	-------	--------

(c) What was the amount of allowance you last received?

TRAINBEN (519)

Q 57c			
-------	--	--	--

(d) How long a period did this cover?

Enter period code

PERCS19	(520)	Q 57 D
---------	-------	--------

If code 9, specify period

(e) Are you receiving benefit at present?

Yes →

No →

INA273 (521) Q 57 E

1	1	1
2	2	2

Ask 58

To all

Show prompt card 4

In the last 12 months have you received any of the following benefits?

Exclude Supplementary benefit from 58 to 60  
Exclude Christmas bonus from 58 to 60

58 Industrial injury disablement pension  
(Enter Industrial Widow's pension at 67)

INDDIS (521A) Q 58

Yes →

No →

1	1	1
2	2	2

- Ask (a)-(d)

- Go to 59

(a) For how many weeks did you receive this benefit?

INA205	(522)	Q 58 A
--------	-------	--------

(b) What was the amount of benefit you last received?

INDDISBN (523)

Q 58 B

--	--	--	--

(c) How long a period did this cover?

Enter period code

PERCS23	(524)	Q 58 c
---------	-------	--------

If code 9, specify period

(d) Are you receiving benefit at present?

Yes →

No →

INA238 (525)

Q 58 D

1	1	1
2	2	2

Ask 59

PERIOD CODES:-

Week	- 1	Four weeks	- 4	Six months	- 7
Two weeks	- 2	Calendar month	- 5	Year	- 8
Three weeks	- 3	Three months	- 6	Other period	- 9

		Per No	Per No	Per No
		£ p	£ p	£ p
59 N I Unemployment Benefit Exclude TOPS/YTS and other training allowances	Yes <input checked="" type="checkbox"/>	1	1	1
	No <input type="checkbox"/>	2	2	2
	(a) For how many weeks did you receive N I unemployment benefit?	INA222	(526)	Q59A
	(b) What was the amount of benefit you last received?	UBPAYAMT (527) Q59B		
(c) How long a period did this cover?	Enter period code	PERC527	(528)	Q59c
(d) Are you receiving benefit at present? (If coded 1 at 1(a) check whether on short time working, or if coded 6 or 7 at 1(b) recode as 3 at 1(b))	Yes <input checked="" type="checkbox"/>	1	1	1
	No <input type="checkbox"/>	2	2	2
60 Family income supplement	Yes <input checked="" type="checkbox"/>	1	1	1
	No <input type="checkbox"/>	2	2	2
	(a) For how many weeks did you receive this benefit?	INA256	(530)	Q60A
	(b) What was the amount of benefit you last received?	FIS BEN (531) Q60B		
(c) How long a period did this cover?	Enter period code	PERC531	(532)	Q60C
(d) Are you receiving benefit at present?	Yes <input checked="" type="checkbox"/>	1	1	1
	No <input type="checkbox"/>	2	2	2
61 Supplementary benefit Exclude Housing Benefit Include direct payment of gas and electricity	Yes <input checked="" type="checkbox"/>	1	1	1
	No <input type="checkbox"/>	2	2	2
	(a) For how many weeks did you receive this benefit?	INA228	(534)	Q61A
	(b) What was the amount of benefit you last received?	SUPBAMT (535) Q61B		
(c) How long a period did this cover?	Enter period code	PERC535	(536)	Q61c
(d) Are you receiving benefit at present?	Yes <input checked="" type="checkbox"/>	1	1	1
	No <input type="checkbox"/>	2	2	2

UNEM BEN (525A) Q59

INA223 (529) Q59b

FIS (529A) Q60

INA257 (533) Q60D

SUPBEN (533A) Q61

INA229 (537) Q61D





To all  
Show prompt card 6

In the last 12 months  
have you received any  
of the following benefits?

65 N1 Death grant

DEAGRANT (543A) Q65

Yes →  
No →

Per No		Per No		Per No	
1	2	1	2	1	2

£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a)  
Go to 66

DEAGRANT (544) Q65A

(a) What was the total amount of  
grant you have received in  
the last 12 months?

--	--	--	--	--	--

Ask 66

66 Christmas Bonus?

PXMASBON (549A) Q66

Yes →  
No →

Per No		Per No		Per No	
1	2	1	2	1	2

£	p	£	p	£	p

Ask (a)  
Go to 67

PXMBONAM (550) Q66A

(a) What was the total amount of  
Christmas Bonus you have received in the  
last 12 months?

--	--	--	--	--	--

Ask 67

67 Any N1 or State benefit  
not mentioned earlier?

OTHBEN (545) Q67

Yes →  
No →

Include Job Release Allowance  
War Widows Benefit  
Industrial Widows Pension

Per No		Per No		Per No	
1	2	1	2	1	2

£	p	£	p	£	p

Specify on  
left and  
ask (a)-(d)  
Go to 68

Per No      Specify  
Per No      Specify  
Per No      Specify

(a) What was the total number of weeks  
you have received this benefit?

INA232	(546)	Q67A
--------	-------	------

(b) What was the amount of benefit  
you have last received?

OTHBENAM (547) Q67B

--	--	--	--	--	--

(c) How long a period did this cover?

Enter period  
code

PERCS47	(548)	Q67C
---------	-------	------

If code 9,  
specify period

(d) Are you receiving benefit at present?

INA233 (549) Q67D

Yes →  
No →

Per No		Per No		Per No	
1	2	1	2	1	2

Ask 68

PERIOD CODES -					
Week	-1	Four weeks	-4	Six months	-7
Two weeks	-2	Calendar month	-5	Year	-8
Three weeks	-3	Three months	-6	Other period	-9

To all

In the last 12 months have you received any of the following benefits?

Per No	Per No	Per No

TUSICKPY (553) Q 68

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

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)-(d)  
- Go to 69

(a) For how many weeks did you receive this benefit?

INA230	(554)	Q 68 A
--------	-------	--------

(b) What was the amount of benefit you last received? TUSICBEN (555) Q 68 B

--	--	--	--	--	--

(c) How long a period did this cover?

Enter period code

PERC555	(556)	Q 68 c
---------	-------	--------

If code 9, specify period

INA231 (557) Q 68 D

(d) Are you receiving benefit at present?

Yes  No

1	1	1
2	2	2

Ask 69

Show Prompt Card E

69 Are you at present receiving a pension from a previous employer, pension from a trade union or Friendly Society, an annuity or personal pension payment from a trust or covenant?

EMPPEN (557A) Q 69

Yes  No

1	1	1
2	2	2

Ask (a)-(d) and 70 on page 27  
Go to 71

PERIOD CODES:-		
Week	- 1	Four weeks - 4
Two weeks	- 2	Calendar month - 5
Three weeks	- 3	Three months - 6
		Six months - 7
		Year - 8
		Other period - 9

PAB To staple to page 40

27(40)

Interviewer Use		
Mr	Ms	His

69 (cont d)

Individuals

Record details of income received	Per No	Item No	Off Use	Last payment £ p	Enter period code	If code 9 spec f, period	Was tax deducted at source? Y N	Amount of tax deducted at source £ p	Was last payment before, after 1 2
<b>(a) Employee pension from</b> Central or Local Govt Armed Forces Nationalised Industry or other previous employers?		1	1				Y		1 2
		2	1				N		1 2
		3	1				Y		1 2
		4	1				Y		1 2
<b>(b) Pension as a member of a Trade Union or Friendly Society?</b>		1	2						1 2
		2	2						1 2
		3	2						1 2
<b>(c) Annuity and personal pension?</b>		1	3				1 2		1 2
		2	3				1 2		1 2
		3	3				1 2		1 2
<b>(d) Payment from trust or covenant?</b>		1	4				1 2		1 2
		2	4				1 2		1 2
		3	4				1 2		1 2

(551 B) Q691

EMPERNO

EMPTNO (551C) Q692

TYEMPPEN (558) Q693

EMPPENRV (560) Q694

PERC560 (561) Q695

EM PEN (561 A)

EM PEN T X (562) Q697

EMPPENTT (563) Q698

See 70

To all at present receiving an employee pension (coded Yes 1 at 69 (p 26) and answering at (a) above)

DNA Not receiving pension →

DO NOT KEY	DO NOT KEY	DO NOT KEY
Per No	Per No	Per No
N	N	N

70 (Apart from tax) were there any other deductions from your last pension payment?

INB351 (563A) Q701

Per No	Purpose of deductions (probe fully)	Amount		Was deduction made at source?		Was last pension payment before, after deductions?	
		£	p	Yes	No	before deductions?	after deductions?
				Y	X	B	A
				V	X	B	A
				Y	X	S	A

Ask 71

To all  
Show prompt card E

71 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?

SAVINGS (574)

Q71

Yes  
No to all

Per No	Pe No	Per No

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)  
- Go to 73

(a) What savings accounts did you have?

National Savings Bank (Post Office)

(i) Ordinary Account(s) SAVTYPE1 (575) Q71A1

(ii) Investment Account(s)? SAVTYPE2 (575A) Q71A2

Trustee Savings Bank? SAVTYPE3 (575B) Q71A3

(Ordinary Savings Account(s) and Investment Deposit Account(s))

Building Society? SAVTYPE4 (575C) Q71A4

High Street Banks? SAVTYPE5 (575D) Q71A5

(Deposit and Savings Account(s)) SAVTYPE6 (575E) Q71A6

Any other savings banks or societies?

1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6

Ask 72 for each account held

Specify on left and ask 72

Per No Specify  
Per No Specify  
Per No Specify

72 How much interest have you received or been credited with from each of your account(s) past and present in the last 12 months that is since?

Joint accounts - enter in one person number column only

SAVINT1 (575F) Q72A1

(a) National Savings Bank (Post Office)

(i) Ordinary Account(s)? SAVAMIN 1 (576) Q72A2

(ii) Investment Account(s)? SAVINT2 (575G) Q72A3

Trustee Savings Bank? SAVINT3 (575H) Q72B1

(Ordinary Savings Account(s) and Investment Deposit Account(s)) SAVAMIN 2 (576A) Q72A4

Building Society? SAVINT4 (575I) Q72C1

High Street Banks? SAVINT5 (575J) Q72D1

(Deposit and Savings Account(s)) SAVAMIN 3 (576B) Q72B2

Any other savings banks or societies? SAVINT6 (575K) Q72E1

SAVAMIN 4 (576C) Q72C2

SAVAMIN 5 (576D) Q72D2

SAVAMIN 6 (576E) Q72E2

1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6

Ask 73

Per No	Per No	Per No

Show prompt card F

73 At present do you have any money in any of the following?

INVEST (576F)  
Q73

Yes    
 No to all

1	1	1
2	2	2

Ask (a)  
Go to 74

(a) In which savings do you have money?

Prompt all

- Index linked National Savings Certificates
- Fixed Interest National Savings certificates
- Save As You Earn (National Savings) Include all issues
- Save As You earn (Building Societies) Include all issues
- Premium Bonds
- National Savings Income Bonds
- National Savings Deposit Bonds

INV TYPE 1	(576G)	Q73 A1
INVT TYPE 2	(576 H)	Q73 A2
INVT TYPE 3	(576 I)	Q73 A3
INVT TYPE 4	(576 J)	Q73 A4
INVT TYPE 5	(576 K)	Q73 A5
INVT TYPE 6	(576 L)	Q73 A6
INVT TYPE 7	(576 M)	Q73 A7

Ask (b) for each savings held

Show prompt card G

(b) How much money do you have in ..... ?  
(Prompt savings coded above at 73)

Exclude interest

Index linked National savings Certificates

Fixed Interest National savings Certificates

Save As You Earn (National savings) Include all issues

Save As You Earn (Building Societies) Include all issues

Premium Bonds

National Savings Income Bonds

National Savings Deposit Bonds

- Ring code
- Enter code from prompt card G
- Ring code
- Enter code from prompt card G
- Ring code
- Enter code from prompt card G
- Ring code
- Enter code from prompt card G
- Ring code
- Enter code from prompt card G
- Ring code
- Enter code from prompt card G

ENTER CODE FROM PROMPT CARD G		
1	1	1
INVAMT1	(576N)	Q73B1
2	2	2
INVAMT2	(576O)	Q73B2
3	3	3
INVAMT3	(576P)	Q73B3
4	4	4
INVAMT4	(576Q)	Q73B4
5	5	5
INVAMT5	(576R)	Q73B5
6	6	6
INVAMT6	(576S)	Q73B6
7	7	7
INVAMT7	(576T)	Q73B7

Ask 74

To all  
Show prompt card H

74 In the last 12 months, that is since \_\_\_\_\_ have you received or been credited with any of the following  
Interest on **WAR LOAN (S18A) Q74A**  
(a) British Savings Bonds or War loan? Yes  No

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)  
- Go to (b)

(i) What was the total interest over the last 12 months? **WAR AMT (S19) Q74A1**

Interest and dividends on **UNITTRST (S19A) Q74B**  
(b) Unit trusts? Yes  No

1		1		1	
2		2		2	

- Ask (i)  
- Go to (c)

(i) What was the total interest and dividends over the last 12 months? **UNTRSTIN (S80) Q74B1**

(c) Stocks, shares, bonds, debentures, local authority securities or any other securities after deduction of tax at source? Yes  No   
**STOCKSSH (S80A) Q74C**

1		1		1	
2		2		2	

- Ask (i)  
- Go to (d)

(i) What was the total interest and dividends over the last 12 months? **STDSHINT (S81) Q74C1**

Show prompt card J

(d) Stocks, shares, bonds, debentures, local authority securities or any other securities before deduction of tax at source? Yes  No   
**STSHBEF (S81A) Q74D**

1		1		1	
2		2		2	

- Ask (i)  
- Go to (e)

(i) What was the total interest over the last 12 months? **STSHBINT (S81B) Q74D1**

(e) Interest from private loans? **PRINT (S81C) Q74E**  
Yes  No

1		1		1	
2		2		2	

- Ask (i)  
- Go to 75

(i) What was the total interest over the last 12 months? **PRINTAM (S81D) Q74E1**

75 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)? **RENTREC (S81E) Q75**  
at 13 Household Schedule Yes  No

1		1		1	
2		2		2	

- Ask (a)  
- Go to 76

(a) How much did you receive in the last 12 months before deducting income tax but after deducting all allowable expenses? **RENRECAM (S82) Q75A**

76 In the last 12 months that is since \_\_\_\_\_ have you received any other unearned income? **UNEARNIN (S82A) Q76**  
Yes  No

1		1		1	
2		2		2	

- Specify on left and ask (a)  
- Go to 77

Include income as sleeping partner in business if declared to Inland Revenue  
Per No Specify  
Per No Specify  
Per No Specify

(a) How much have you received in the last 12 months? **UNEARNAM (S82B) Q76A**

--	--	--	--	--	--

Ask 77

To all  
Show prompt card K

77 In the last 12 months, that is since  
have you received any of the following  
allowances shown on this card?

ALLOW (582c) Q77

Yes   
No to all

	Per No	Per No	Per No
	£ p	£ p	£ p
1	1	1	1
2	2	2	2

- Ask (a)  
- See 78

(a) What allowances have you received

Running  
prompt

- 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 for a foster child
- an allowance from any other source for a foster child
- EEC training allowance?

Q77A. 1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6

- Ask (b) & (c)

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

(b) How much was the last payment?

ALLRECOM (584)	QT1B
----------------	------

(c) How long a period did it cover?

- Week
- Fortnight
- Four weeks
- Calendar month
- Some other period

Q77C (585) PERC584	1	1
2	2	2
4	4	4
5	5	5
9	9	9

- If code 9, specify period

To a married person whose spouse is not a member of household or who is an absent spender (if coded 2 in col 5 or not ringed in column 9 of Schedule A, page 1)

DNA

SPOUSEAL (585A)

78 Have you received any allowances from your husband/wife while he/she has been away?

Yes   
No

Q78

	N	N	N
1	1	1	1
2	2	2	2

Go to 79

- Ask (a) & (b)

- Go to (c)

(a) How much in total allowances have you received from your husband/wife while he/she has been away?

SPOUSALRE (586) Q78A

1			
2			

(b) How long a period does this amount cover?

- Week
- Fortnight
- Four weeks
- Calendar month
- Some other period

Q78B (587) PERC586	1	1
2	2	2
4	4	4
5	5	5
9	9	9

- If code 9, specify period

(c) (In addition to the allowance mentioned), does your husband/wife pay direct any household expenses?

Yes   
No

SPSALDIR (587A) Q78C

1	1	1
2	2	2

- Specify below

- Go to 79

Per. No.	Household expenses paid
SPALDIPD (588) Q78c1	

						OFF. USE
--	--	--	--	--	--	----------

To all

79 In the last 12 months that is since have you received any coke or coal from your present (or former) employer?

COAL (594)  
Q79

Yes Coke  
Yes Coal  
No to both

Per No	Per No	Per No
£ p	£ p	£ p
1	1	1
2	2	2
3	3	3

- Go to (a)  
- Go to (b)  
- See 80

(a) What is the brand of coke or smokeless fuel you have mentioned?

Per No Specify  
Per No Specify  
Per No Specify

--	--	--

(b) What quantity of have you received in the last 12 months?

Lbs  
Cwts  
Tons  
Other measure

COALLBS (594A)	Q79B1
COALCWT (594B)	Q79B2
COALTONS (594C)	Q79B3
COALOTH (594D)	Q79B4

- Specify on left

Per No Specify  
Per No Specify  
Per No Specify

(c) Was the provided free or did you have to pay something for it? Include haulage charges

FREECOAL (597) Q79c

Free  
Pay something

1	1	1
2	2	2

- See 80  
- Ask (i)

(i) How much did you pay including any haulage costs?

COALPAY (598)	Q79c1
---------------	-------

- See 80

INB322 (771)	Q79c2.	OFF USE
--------------	--------	---------

To all men aged 65 & over and women aged 60 & over DNA Others

N	N	N
---	---	---

- Go to 81

80 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)?

CONBUS (598A) Q80

Yes  
No

1	1	1
2	2	2
3	3	3

- Ask (a)  
- Go to 81

No concessionary bus travel provision in area

CONBUSTY (599) Q80A

(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

1	1	1
2	2	2
3	3	3
4	4	4
5	5	5

- Go to 81  
- Specify on left and ask 81

Per No Specify  
Per No Specify  
Per No Specify

NB If more than one scheme in local authority area establish



To all

81 During the last 12 months that is since ..... have you received any money as a mail order agent or baby sitter?

MAILBABY (599A)

Q 81

Yes

No

Per. No.		Per. No.		Per. No.	
£	p	£	p	£	p
1		1		1	
2		2		2	
1		1		1	
2		2		2	
1		1		1	
2		2		2	
1		1		1	
2		2		2	

- Ask (a)-(c)

- Go to 82

(a) Was this as a

MAILORDE (600) Q81A

mail order agent

or as a baby sitter?

Ask (b) and (c)

(b) How much did you earn?

MLBABAMT (601) Q81B

(c) Are you doing this work at present?

INA275 (602) Q81C

Yes

No

Ask 82

To all

**DIRTAX (606A) Q 82**

**82** During the last 12 months that is since **you** have you paid any income tax direct to Inland Revenue?

Yes    
 No

Per No		Pe No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a) & (b)   
 - Go to 83

**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?

**DIRTAXAM (607) Q 82A**

(b) What was the source of income on which you were taxed?

Per No Specify   
 Per No Specify   
 Per No Specify

**83** Has Inland Revenue or DHSS refunded any income tax direct to you during the last 12 months?

Yes    
 No

**DIRTAXR (607A) Q 83**

1		1		1	
2		2		2	

- Ask (a)-(c)   
 - See 84

**Exclude NI refunds and refunds included in wage or salary**

(a) How much was refunded?

**DIRTXRAM (608) Q 83A**

(b) Was this a refund of tax deducted under PAYE?

Yes    
 No

**PAYEREF (609) Q 83B**

1		1		1	
2		2		2	

(c) Was this refund received in respect of either unemployment or redundancy?

Yes    
 No

**REDNREF (610) Q 83c**

1		1		1	
2		2		2	

- See 84   
 - Ask (i)

(i) What was the reason for the refund? **Specify below**

Per No Specify   
 Per No Specify   
 Per No Specify

See 84

To all men under 66 and all women under 61 who are not employees (coded 2-7 at 1)

DNA

N		N		N	
---	--	---	--	---	--

- Go to 85

**NI CONT (482A) Q 84**

**84** Do you pay a regular National Insurance Contribution?

Yes    
 No

**Exclude lump sum payments, which go at 85**

1		1		1	
2		2		2	

- Ask (a) & (b)   
 - Go to 85

(a) How much was the last contribution you paid?

**NI CONTAM (483) Q 84A**

(b) How long a period did this cover?

Week    
 Fortnight    
 Four weeks    
 Calendar Month    
 Some other period

**PERC 483 (484) Q 84B**

1		1		1	
2		2		2	
4		4		4	
5		5		5	
9		9		9	

- If code 9 specify period

Ask 85

To all

Per. No.	Per. No.	Per. No.

85 Have you paid any NI Contributions direct to Inland Revenue or Department of Health and Social Security during the last 12 months? **NIDIRECT (610A) Q85**

Yes →  
No →

£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a)  
Go to 86

Exclude: Deductions from wage or salary, or regular self employed, non-employed contributions

Include: Lump sum payments by Self employed (if proportion of profits) and lump sum back payments by Non-employed.

(a) How much did you pay? **DIRNIAM (611) Q85A**

(i) What was the reason for this direct payment?

Per. No. .... Specify .....  
Per. No. .... Specify .....  
Per. No. .... Specify .....

--	--	--	--	--	--

Ask (i)

86 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

**CHARITY 1 (612A) Q861**

**CHARITY 2 (612B) Q862**

Private individual →  
Charity →

**CHARITY 3 (612) Q863**

No to both →

1	1	1
2	2	2
3	3	3

Ask (a)  
See (a): ask (b)  
Go to 87

To those coded 1 at 86

**TIMEABRD (613) Q86A**

(a) Has had the person(s) lived abroad for more than 12 months?

Yes →  
No →  
DK →

1	1	1
2	2	2
3	3	3

Ask (i)  
See (b)

(i) How much (in pounds) have you sent abroad to this person(s) in the last 12 months

**ABRDAMT (614) Q86A1**

**ABAMTDK (614A) Q86A2**

DK →

1	1	1			

See (b)

To those coded 2 at 86

**CHARAMT (615) Q86B1**

(b) How much (in pounds) have you sent abroad to this charity (charities) in the last 12 months?

**CHAMTDK (615A) Q86B1**

DK →

1	1	1			

Ask 87

To all

87 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 87 instead relevant questions should be asked about employment or self employment

ODDJOBS (603) Q87

Yes →  
No →

Per No	Per No	Per No
1	1	1
2	2	2

Record details in grid below - See 88

TO PUNCHERS	TO PUNCHERS	TO PUNCHERS
END KEYING THIS PERSON AND RETURN TO START OF SCHEDULE	END KEYING THIS PERSON AND RETURN TO START OF SCHEDULE	Key 87(a)

RECORD 57

(a) Record details below -

Enter each time job took place on a separate line

Per No	Item No	Description of work or advice	Amount of fee for each job		Period covered by fee ENTER PERIOD CODE	If code 9 specify period	Date(s) when job(s) took place Enter dates as two digit code			
			£	p			FROM Month Year	TO Month Year		
NO (603) Q87A1	1				PERC			AS	A6	
NO (603) Q87A2	2				604			Q87	Q87	
NO (603) Q87A3	3				(604A)			(605)	(606)	
ER NO (603) Q87A4	4				Q87A4			AR	D	
OP NO (603) Q87A5	5							ST	SEN	
	6							ODD	ODD	

See 88

OSITNO (603 B) Q87A2

OSAMT (604) Q87A3

PERIOD CODES -			
Week	- 1	Four weeks	- 4
Two weeks	- 2	Calendar month	- 5
Three weeks	- 3	Three months	- 6
		Six months	- 7
		Year	- 8
		Other period	- 9

RECORD 58

Ask about each dependent under 16.

Child's Per No.	Child's Per No.	Child's Per No.
CHPERSNO (617)	Q 88	
ε p	ε p	ε p
N	N	N
- End of income schedule		
CHILDINC (616) Q881		
Yes → 1	1	1
No → 2	2	2
- Ask (a)-(e) - Ask 89		
(a) What kind of job or income? →		
CHINCCON (616A) Q88B		
Yes → 1	1	1
No → 2	2	2
- Go to (c) - Ask (l)		
(l) For how many weeks has he/she had it? →		
CHINCWKS (618) Q88B1		
(c) How much did he/she get last time? →		
CHINCAMT (619) Q88C		
Weekly → 1	1	1
Fortnightly → 2	2	2
Four weekly → 4	4	4
Calendar monthly → 5	5	5
Yearly → 8	8	8
Some other period → 9	9	9
- If code 9, specify period →		
Q88D. PERC 619 (620)		
Ask (e)		
(e) Does he/she usually →		
CHINCDIS (621) Q88E		
dispose of (or save) it all him/herself → 1	1	1
partly dispose of (or save) it and give the rest to you → 2	2	2
give it all to you? → 3	3	3
- Ask 89		

Show prompt card F

89 At present do any of your children under 16 have any money in any of the following?

CHINVEST (621 B)  
Q 89

Yes →  
No to all →

Child's Per No	Child's Per No	Child's Per No
1	1	1
2	2	2
N	N	N

- Ask (a)  
End of income schedule

(a) In which savings do you have money?

- Index linked National Savings Certificates CHINVTY1 (621C) Q89A1 →
- Fixed Interest National Savings certificates CHINVTY2 (621D) Q89A2 →
- save As You Earn (National Savings) Include all issues CHINVTY3 (621E) Q89A3 →
- Save As You earn (Building Societies) Include all issues CHINVTY4 (621F) Q89A4 →
- Premium Bonds CHINVTY5 (621G) Q89A5 →
- National Savings Income Bonds CHINVTY6 (621H) Q89A6 →
- National Savings Deposit Bonds CHINVTY7 (621I) Q89A7 →

Ask (b) for each savings held

1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7

Show prompt card G

(b) How much money do your children have in (Prompt savings coded above at 89(a))

Exclude interest

Index linked National savings Certificates

Ring code →  
Enter code from prompt card G →

ENTER CODE FROM PROMPT CARD G		
1	1	1
CHINVA	m1 (621J)	Q89B1

Fixed Interest National savings Certificates

Ring code →  
Enter code from prompt card G →

2	2	2
CHINVA	m2 (621K)	Q89B2

Save As You Earn (National savings) Include all issues

Ring code →  
Enter code from prompt card G →

3	3	3
CHINVAM	3 (621L)	Q89B3

Save As You Earn (Building Societies) Include all issues

Ring code →  
Enter code from prompt card G →

4	4	4
CHINVAM	4 (621M)	Q89B4

Premium Bonds

Ring code →  
Enter code from prompt card G →

5	5	5
CHINVAM	5 (621N)	Q89B5

National Savings Income Bonds

Ring code →  
Enter code from prompt card G →

6	6	6
CHINVAM	6 (621O)	Q89B6

National Savings Deposit Bonds

Ring code →  
Enter code from prompt card G →

7	7	7
CHINVAM	7 (621P)	Q89B7

End of income schedule

TO PUNCHERS	TO PUNCHERS	TO PUNCHERS
END KEYING THIS CHILD KEY NEXT CHILD	END KEYING THIS CHILD KEY NEXT CHILD	END KEYING THIS CHILD KEY PAGE 40

'Blank page'

**PAB: Please staple  
page 27 to this page**

# FAMILY EXPENDITURE SURVEY-1986

## 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 } balance outstanding or New }	£.....*

\* 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**



AREANUMC (C02) Q003  
 SERNUMC (C03) Q004  
 HHNUMC (C04) Q005  
 PERSNDC (C05) Q006

Interviewer Use							EMP USE
Area	Ref. No.	Hld.	Est. No.	7	8	9	Employment No.
					1		
					2		

ITEMS SHOWN ON THIS CREDIT CARD ACCOUNT

CCNO (C07) Q008

CCTYPE (C06) Q007

Please write below, the description and cash price of the goods or services included in this account (eg Petrol £10.00) and the date acquired.

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 refunded or claimed as business expenses, please add "to be refunded or claimed" beside entry.

Should you have any problems filling in this form please let the interviewer know.

RECORD 116

Date acquired	Description of items bought If clothing please give sex of wearer, and if child the age	Item No.	Cash price of item		PLEASE LEAVE BLANK
			£	P	
	CCITEMNO (C08) Q009	1			
		2			
	CCASHPR (C09) Q0010	3			
		4			
		5			
	CCITCODE (C10) Q0011	6			
		7			
	CCQUAL (C11) Q0012	8			
		9			
		10			
		11			
		12			
		13			
		14			
		15			
		16			
		17			
		18			
		19			
		20			

FAMILY EXPENDITURE SURVEY - 1986

CI				
Interviewer use				
Area	Ser	Hid	Per No	7-day period
				1
				2

AREANUMD(002) Q003

SERNUMD(003) Q004

HHNUMD(004) Q005

PERSNOD(005) Q006

EXPAWK(006) Q007

Ref No

**IN CONFIDENCE**

All the particulars you give on this form will be treated in STRICT CONFIDENCE  
Please do not put your name and address on it.

The interviewer will call again on

DAY	DATE	TIME

PLEASE CHECK PAGE 20

FOR INTERVIEWERS USE	
NO	X
YES	Y →
Credit card at Q 68 (S836A)	Credit card account
	Paid
	Not paid
	1
	2

DCCACCPD(007) Q008

## HOW TO FILL UP THIS BOOKLET

1. This booklet should contain a complete record of everything which **you yourself** pay for: other members of your household have separate booklets.
  
2. Please include **everything** that you pay for during the seven days, whether it is paid for out of your own money, housekeeping, luncheon vouchers, money from a loan or any other source, and whether payment is by cash, cheque, postal order, giro cheque, or other means of payment.
  
3. Write down the actual payments you make during the seven days, even if the goods were obtained previously, or are going to be delivered later. Any goods ordered or delivered but **not** paid for during the seven days should not be included. If you buy anything by part exchange, please give the amount paid **after** deducting the amount allowed in part exchange.
  
4. Show each item, however small, **on a separate line** and the amount spent on it. Do not, for example, write 'vegetables' but show separately how much you spent on potatoes, cabbages, frozen beans, tinned peas and so on. Do not write £ and p. signs in columns.
  
5. If you ask someone else to buy things for you, and you pay for them, details of the purchases should be included in your own booklet.
  
6. **Hire Purchase.** If you **start** buying anything by instalments on any of the seven days, write down the amount and state that it is the first instalment, down payment, etc.  
If during the seven days you pay instalments on any goods which you are already buying by instalments, write down **what** the article is and how much you pay.
  
7. **Budget Accounts, Clothing Clubs, Mail Order Clubs, etc.** If you pay anything **into** a budget account, clothing club, etc. during the seven days, please write each payment down with a description of the account or club into which it is paid. There is no need to record any goods you **obtain** from these clubs.
  
8. **Credit Cards.** If you have a credit card, eg Access, American Express, Barclaycard, Diners Club (exclude bankers cheque cards), please see sheet provided by interviewer regarding **payment** of credit card accounts. **Do not** record acquisitions by credit card in this booklet.
  
9. **Postal Orders.** If you buy a postal order please record it, noting its value and poundage on separate lines. Note beside the postal order the purpose for which it is to be used and the date it will be posted. See example page 5.
  
10. **Shopkeepers, Farmers.** If your household obtains any food or other goods from its own shop or farm, please write down what is obtained each day with its approximate value. If these goods were not paid for at the time also write 'own shop' or 'own farm' against each item.

11 **Meals, snacks soft drinks and other non alcoholic drinks bought and consumed away from home** Include any food or non alcoholic drinks bought and consumed outside the home. Non-alcoholic drinks include tea, coffee, milk, Horlicks etc. as well as fruit juices and other soft drinks. Even if these are taken on their own please record them here. Also please include breakfast, lunch, dinner, snacks, cups of tea or coffee if these are bought and consumed away from home. Meals, snacks or drinks bought at a workplace should be recorded separately from other meals.

For meals and snacks purchased at places other than at a workplace, please state whether you ate the food on or off the premises. See example page 5.

If you bought a snack please state what it comprised. See example page 5.

12 **Beer, wine and spirits and other alcoholic drinks bought and consumed away from home** Please include alcoholic drinks taken on their own at pubs, wine bars, clubs, as well as alcoholic drinks taken with meals. Alcoholic drinks taken home should be entered on the left hand page see 'beer' example page 4.

If you have alcoholic drinks with a meal please list these separately and indicate that they are taken with a meal, see example page 5.

Please specify the type of alcoholic drink eg beer, wine, sherry, vermouth, port, spirits, cider, perry, etc.

13 **Take-away meals brought home** Please record on the left hand page any take-away food which you bring home to eat, see fish and chips in example, page 4. Also include Meals on Wheels.

Please note beside the entry if the meal was served hot.

14 **Take-away food consumed away from home** Any take-away food which is either consumed on the premises of the take-away food shop or off the premises but not taken home should be recorded in the Meals out section on the right hand page.

If consumed off the premises please note beside entry if the food was served hot.

15 **Holiday Expenses** Please say whether holiday is in this country or abroad. (a) If in England, Wales, Scotland or Northern Ireland give payments during the 7 days covered by this record in as much detail as possible, if it is impossible to give each item separately a single heading (eg hotel bill) will do. (b) If in the Channel Islands, the Isle of Man, the Irish Republic or abroad please do not itemise the expenses, but give the total amount spent in the days covered by this booklet and the country where the holiday is spent.

16 **Gifts and Presents** Please say what is bought, and record it on the day of purchase. If money is given say that it is a present of money and who received it, for example, 'Present of money to niece', 'Pocket money to son', or 'Money to daughter away at university'. In particular please distinguish whether money is given to a member of the household or to someone outside the household.

17 **Clothing** For any clothing or footwear including gifts to people please say for whom the item is bought, also the sex and age eg shoes for son aged 10 see example, page 5.

18 **Betting** If you make any bets during the seven days covered by this booklet please state what they are (sweepstake, bookmaker, totalisator, Bingo, lottery etc) and give the amounts. If you receive any winnings during the seven days please give details in question 2 on page 20.

Please look through the list shown at the end of this booklet it may remind you of items which you may have forgotten to record.

Please use page 23 for any notes you may wish to make for any explanation of your purchases.

EXAMPLE PAGE

FOOD and drink brought home (except take-away meals).  
Include alcoholic drinks and soft drinks brought home.

Lamb (fresh)

4 25

Peas (tinned)

25

Peaches (fresh)

42

Cod (frozen)

75

Apple Pie

45

Beer

1 96

Please leave blank

Take-away meals brought home, eg fish and chips, take-away Chinese food,  
Meals on Wheels, etc.

Fish and Chips (Hot)

1 85

EXAMPLE PAGE

Please write each item on a separate line

Meals, snacks and non-alcoholic drinks (including soft drinks) bought and consumed away from home Include tips and service charge

(1) Bought at workplace canteen staff dining room, etc

Snack Cheese Roll  
Cup of tea

(2) Bought at cafe, restaurant, hotel, fish and chip shop, sandwich bar, public house, school shop, tuck shop, cinema, etc

Meal out (incl tips)  
Bar of chocolate  
Toasted Cheese sandwich (hot)

CONSUMED	
ON PREMISES	OFF PREMISES
RING	
①	2
1	②
1	②
1	2

Beer, wine, spirits and other alcoholic drinks bought and consumed away from home

Wine (with meal)  
Beer

Cigarettes and tobacco, Newspapers, Magazines, Books, Postage

Matches

Fuel and Light (including payments into slot meters), Household goods, Cleaning materials, Furniture

Travel by rail, bus, air, taxi, Motor vehicles (purchase, petrol, oil and repairs), Cycles etc

Bus fare

Clothing, Clothing materials and Footwear

Jacket for self  
Shoes for son aged 10

Any other payments made to-day, with full details, e.g. domestic help, entertainment, hairdressing, holidays, toiletries

Postal Order - football pools - posted 15<sup>th</sup> Sept -  
Poundage  
Present - doll  
Video recorder - monthly rental

Amount paid		Please leave blank
£	p	
	30	
	20	
15	00	
	25	
	50	
4	50	
	90	
	07	
	50	
50	00	
17	99	
	50	
	20	
8	78	
16	00	
		ALSO SEE PAGE 20

If any of today's expenses are to be claimed as business expenses or will be refunded please add 'to be claimed or refunded



FIRST DAY (continued)

	Amount paid		Please leave blank														
	£	p															
<i>Please write each item on a separate line</i>																	
<b>Meals, snacks and non-alcoholic drinks (Including soft drinks) bought and consumed away from home</b> Include tips and service charge (1) Bought at workplace, canteen, staff dining room, etc  (2) Bought at cafe, restaurant, hotel fish and chip shop, sandwich bar, public house, school shop, tuck shop, cinema, etc																	
	<table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th colspan="2">CONSUMED</th> </tr> <tr> <th>ON PREMISES</th> <th>OFF PREMISES</th> </tr> <tr> <th>1</th> <th>2</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2</td> </tr> <tr> <td>1</td> <td>2</td> </tr> <tr> <td>1</td> <td>2</td> </tr> <tr> <td>1</td> <td>2</td> </tr> </tbody> </table>		CONSUMED		ON PREMISES	OFF PREMISES	1	2	1	2	1	2	1	2	1	2	
CONSUMED																	
ON PREMISES	OFF PREMISES																
1	2																
1	2																
1	2																
1	2																
1	2																
Beer, wine spirits and other alcoholic drinks bought and consumed away from home																	
Cigarettes and tobacco Newspapers, Magazines, Books, Postage																	
Fuel and Light (including payments into slot meters), Household goods, Cleaning materials, Furniture																	
Travel by rail, bus, air, taxi, Motor vehicles (purchase, petrol, oil and repairs), Cycles etc																	
Clothing, Clothing materials and Footwear																	
Any other payments made to-day, with full details, e.g domestic help, entertainment, hairdressing, holidays, toiletries																	

ALSO SEE PAGE 20

If any of today's expenses are to be claimed as business expenses or will be refunded please add to be claimed or refunded





SECOND DAY (continued)

Please write each item on a separate line

Meals, snacks and non-alcoholic drinks (including soft drinks) bought and consumed away from home Include tips and service charge

(1) Bought at workplace, canteen, staff dining room, etc

(2) Bought at cafe, restaurant, hotel, fish and chip shop, sandwich bar, public house, school shop, tuck shop, cinema, etc

CONSUMED	
ON PREMISES	OFF PREMISES
1	2
1	2
1	2
1	2

Amount paid		Please leave blank
£	p	

Beer wine, spirits and other alcoholic drinks bought and consumed away from home

Cigarettes and tobacco, Newspapers, Magazines, Books, Postage

Fuel and Light (including payments into slot meters), Household goods, Cleaning materials, Furniture

Travel by rail, bus, air, taxi, Motor vehicles (purchase, petrol, oil and repairs), Cycles etc

Clothing, Clothing materials and Footwear

Any other payments made to-day, with full details, e.g domestic help, entertainment, hairdressing, holidays, toiletries

ALSO SEE PAGE 20



THIRD DAY (continued)

<p style="text-align: center; margin-bottom: 5px;"><i>Please write each item on a separate line</i></p>	Amount paid		Please leave blank															
	£	p																
<p><b>Meals, snacks and non-alcoholic drinks (including soft drinks) bought and consumed away from home Include tips and service charge</b></p> <p>(1) Bought at workplace, canteen, staff dining room, etc</p>    <p>(2) Bought at cafe, restaurant, hotel, fish and chip shop, sandwich bar, public house, school shop, tuck shop, cinema, etc</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center;">CONSUMED</th> </tr> <tr> <th style="text-align: center;">ON PREMISES</th> <th style="text-align: center;">OFF PREMISES</th> </tr> <tr> <th style="text-align: center;">RING</th> <th style="text-align: center;">RING</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> </tr> </tbody> </table>	CONSUMED		ON PREMISES	OFF PREMISES	RING	RING	1	2	1	2	1	2	1	2				
CONSUMED																		
ON PREMISES	OFF PREMISES																	
RING	RING																	
1	2																	
1	2																	
1	2																	
1	2																	
<p><b>Beer, wine, spirits and other alcoholic drinks bought and consumed away from home</b></p>																		
<p><b>Cigarettes and tobacco Newspapers, Magazines, Books, Postage</b></p>																		
<p><b>Fuel and Light (including payments into slot meters) Household goods</b>  <b>Cleaning materials Furniture</b></p>																		
<p><b>Travel by rail, bus, air taxi, Motor vehicles (purchase, petrol, oil and repairs) Cycles etc</b></p>																		
<p><b>Clothing Clothing materials and Footwear</b></p>																		
<p><b>Any other payments made to day with full details, e.g domestic help, entertainment, hairdressing holidays toiletries</b></p>																		

ALSO SEE PAGE 20



FOURTH DAY (continued)

Please write each item on a separate line

Meals snacks and non-alcoholic drinks (including soft drinks) bought and consumed away from home Include tips and service charge  
 (1) Bought at workplace, canteen, staff dining room etc

(2) Bought at cafe, restaurant, hotel, fish and chip shop sandwich bar, public house, school shop, tuck shop, cinema, etc

CONSUMED	
ON PREMISES	OFF PREMISES
1	2
1	2
1	2
1	2

Beer, wine, spirits and other alcoholic drinks bought and consumed away from home

Cigarettes and tobacco Newspapers, Magazines, Books, Postage

Fuel and Light (including payments into slot meters), Household goods Cleaning materials, Furniture

Travel by rail bus, air, taxi, Motor vehicles (purchase, petrol oil and repairs), Cycles etc

Clothing Clothing materials and Footwear

Any other payments made to-day with full details, e.g domestic help entertainment, hairdressing holidays toiletries

Amount paid		Please leave blank	
£	p		

ALSO SEE PAGE 20















## 1. Expenses refunded or claimed

Please give particulars below of any expenditure (eg motor car, travelling, hotel expenses) shown on pages 6-9 in this booklet which:

- (a) have already been refunded by a business or organisation; or
- (b) have already been claimed as expenses from a business or organisation; or
- (c) will definitely be claimed by you in the future as expenses from a business or organisation; or
- (d) will be entered as expenses in making your income tax return.

Date expenditure incurred	Description of business expense refunded or claimed or to be claimed from business organisation	Amount refunded or claimed		Please leave blank	
		£	p		
					2
					2
					2
					2
					2
					2

## 2. Football pools and other betting

Please give details of any winnings you have received during the 7 days covered by this booklet.

	Winnings in last seven days			
	£	p		
Football pools .....			821	3
Bookmaker, betting shop, totalisator .....			822	3
Lotteries .....			823	3
Other betting (Bingo, sweepstake, etc) .....			824	3

## REFERENCE LIST OF IMPORTANT ITEMS OF EXPENDITURE

Of the hundreds of different things which it is possible to buy the following is only a list of examples. Please look through this list in case it reminds you of any purchase which you have forgotten to record.

### Food -

Bread cakes buns biscuits chocolate biscuits flour  
 Breakfast cereals rice spaghetti custard powders  
 Beef veal mutton lamb pork bacon ham poultry sausages tinned meat rabbit offal (hearts liver kidney etc)  
 Fresh or smoked cod haddock plaice herrings tinned salmon sardines  
 Milk (fresh dried condensed)  
 Margarine lard suet cooking fat  
 Eggs butter cheese  
 Tea coffee instant coffee cocoa  
 Sugar syrup jam marmalade honey lemon curd  
 Fresh dried frozen or tinned potatoes chips crisps tomatoes peas beans carrots  
 Fresh dried frozen or tinned apples oranges plums pears peaches pineapples, apricots  
 Bottled or tinned tomato juice grapefruit juice orange juice  
 Pickle- sauces soups jellies salt pepper  
 Mustard vinegar spices  
 Lemonade lemon squash fruit cordials soda water  
 Food for animals and pets

### Take-away meals -

Fish and chips Chinese food Indian food Fried chicken Meals on wheels

### Meals snacks and non-alcoholic drinks bought and consumed away from home -

Tea coffee snacks sandwiches and meals bought and consumed at work in restaurants cafes, hotels public houses, in parks in cinemas  
 Ice cream soft drinks sweets and chocolate

### Alcoholic drinks -

Beer ale stout wines spirits cider

### Cigarettes and Tobacco, Newspapers, Magazines, Books, Postage -

Cigarettes tobacco cigarette papers cigars pipes pouches lighters lighter fuel cigarette cases  
 Books newspapers magazines stationery  
 Stamps postal orders poundage telegrams telephone calls

### Fuel and light, Household goods, Cleaning materials, Furniture -

Coal coke gas electricity paraffin and other fuel oil firewood candles nightlights, matches  
 Soap soda cleaning powders detergents polishes  
 Paint distemper wallpaper  
 Dustbins pails brushes brooms tools screws nails  
 China glass bowls kettles saucepans  
 Suites or separate articles of furniture  
 Radio television sets or parts hi-fi cassettes pianos music  
 Mattresses pillows sheets blankets tablecloths towels curtains tea cloths  
 Carpets rugs linoleum mats floor covering  
 Fires cookers vacuum cleaners refrigerators wringers washing machines spin-driers sewing machines irons  
 electric lamps bulbs and fittings  
 Clocks watches jewellery cutlery suit-cases handbags sports goods  
 Repairs to furniture radio TV and watches

### Travel -

Journeys by rail bus air taxi including fares to and from work  
 Purchase repairs and running costs of cars motor cycles prams pushchairs carrycots

### Clothing, Clothing materials, Footwear -

Overcoats raincoats suits costumes, skirts sports coats trousers blazers, slippers overalls aprons, dresses, blouses hats gloves  
 Vests pants pyjamas shirts knickers slips corsets brassieres nightdresses socks, stockings, tights  
 Dress material knitting wool thread braces ribbons scarves patterns handkerchiefs  
 Boots shoes slippers sandals  
 Payments to clothing clubs

### Other payments -

Video rental hire of cassettes TV rental  
 Home computer TV games  
 Cameras photographic materials, developing and printing of films  
 Flowers seeds plants garden tools, lawnmowers  
 Animals and pets  
 Toys games playing cards  
 Shoe repairs laundry dyeing and cleaning domestic help  
 Football pools and other betting Bingo etc  
 Children's pocket money birthday presents money given to charities raffle tickets  
 Payments to chemists doctors dentists opticians chiropodists  
 Holiday expenses  
 Purchase of Savings Certificates Premium Bonds etc  
 House purchase and repairs  
 Cinemas theatres concerts football cricket dog-racing dances  
 Lipstick face powder face cream mascara perfumes talc shampoos sanitary towels, deodorant  
 Shaving cream after shave hair cream razors and blades, toilet paper  
 Hairdressing (including tips) sponges face cloths nail brushes  
 Maintenance alimony  
**N B -** Payment of credit card account to be entered on separate sheet provided by interviewer

**NOTES**

Please use the space below for any explanation of your purchases you may wish to make