

OPCS

OFFICE OF POPULATION CENSUSES AND SURVEYS

SOCIAL SURVEY DIVISION

Family Expenditure Survey

INSTRUCTIONS TO INTERVIEWERS

1987

ADDITIONAL NOTES ON FES CALLS AND OUTCOME SHEETS AND H FORMS

Please clip these into your Instructions at page 98.

There is sometimes confusion as to which code on the C & O sheets and H forms applies to different types of ineligible addresses and non responding households. This has been aggravated by a long-standing but undetected misprint at code 2 which will be corrected on the 1987 2nd print.

Please use the following points as a guideline. If in doubt telephone the Field Officer.

Remember to ring the main code and the subsidiary letter where applicable.

CODE 1 Excluded/ineligible . These are addresses where there are residents but they do not form a private household because.

a. The address is a hotel, public house, guest house or commercial boarding house and there is no private household (ie. unconnected with the business) living separately at the address.

ACTION Call at the address to establish whether or not there is a separate part containing a private household not connected with the business. If so interview.

b. Other premises where business and private expenditure cannot be split, eg. a cafe from which the household takes most of its food and where household bills (gas, electricity, etc) cannot be separated.

ACTION As at (a).

c. Institutions - hospitals, schools, old peoples homes, etc.

ACTION Check - there could be a private household within the selected address - caretaker, headmaster, etc, and it could be a separate house in the grounds. Check with S.I.U if in doubt.

d. Household contains a diplomat of a foreign country or a USA serviceman. They are excluded because their expenditure is unusual for various reasons: US servicemen can shop very cheaply at their PX shop on the base.

CODE 2 'No sample at selected address' is a mis-print : it should read 'No sample selected at address'. This will only be used following discussion with the Sampling Implementation Unit

ACTION If two or more houses, flats or household units have merged etc to change the selected address telephone the SIU who will tell you whether or not further selection is required.

CODE 3

No Household at Address -

- g. Household (address) empty at first call - ie. no one living there. Would also include piers a terre and holiday homes. GHS has separate code for these.
- h. House demolished - also include derelict properties but explain what they are.
- i. Not yet built : PAF addresses are often allocated to new developments before they are built.
- j. Other specify : please give full notes on the reverse of the form. PAF includes addresses which no longer exist or which are not as listed: business premises only: change of use - eg. house which contained flats has become an old persons home etc. Note what you find listed for the address at the rates office.

Also include any untraced addresses with a note of the action you took to find them.

ACTION

Check with neighbours etc. at the earliest opportunity.

CODE 4

Household Away and Not Expected to Return Until After Placing Month: Take care with these: they will normally be addresses where you do not contact anyone at the address but call late in the month and learn of the households absence. There is a borderline situation between a code 4 and a refusal where you actually contact a member of the household so close to their starting their holiday that it is difficult to make a placing appointment before they leave.

ACTION

If you are in doubt as to how to code telephone the field officers.

If only part of the household is going away the rest is eligible and B schedules should be completed (as far as possible) for absent spenders.

CODE 5

Household about to leave District within 3 weeks of First Contact: this is where the household is moving too far (ie. 30 miles) for you to make a follow-up call.

CODE 6

Non-contact: this is where you have never been able to contact a household member. Check carefully to establish that there is someone living at the address: also that it is their main residence. (See 'A handbook for Interviewers' page 60, item 4) once a household member has been seen it cannot then be called a non-contact.

CODE 7

Refusal - covers all cases where a member of an eligible household has been contacted but it does not result in an interview. In some cases they do not actually refuse but are just not available to be interviewed during the field period. However, once contact has been made unless the household comes under one of the categories above then it has to be returned as a refusal.

Complete this section fully and note that this year we are asking you to code whether or not you actually started the interview before the refusal occurred. If YES please return the partially completed schedules as per the interviewers instructions. Ring codes 7 and (b) on the calls and Outcome.

Please remember to complete all relevant sections on the reverse of the calls and outcome sheet.

CODE 8

Refusal after promising to keep diaries.

ACTION

Continue with your efforts to keep these to a minimum and try to re-start informants with ie. record books if at all possible make extra calls if they are necessary or the informant needs help to keep the diary.

To: FES Interviewers

From: June Langham

FES Quota covering Multi Local Authority Areas

We are getting more quota than anticipated where the PAF address list straddles 2, 3 or occasionally 4 Local Authority Areas. To avoid excessive time and mileage spent travelling to the offices to collect rateable values, and other information including concessionary travel, you should follow the new guide lines set out below.

1. If the L.A. offices are close to your FES or other survey working area continue to call to collect the rating information.
2. If any office is some distance from your area (and not en route) you should telephone the rates office to try to get the required information for each address.

We will issue you with letters to send to the L.A. offices (copy attached): it will be for you to decide when and where you need to use them, and to find out the name/position of the person/s to whom the letter should be sent.

Several copies of the letter will be sent out with your materials (from February) and can be used for rents and rates offices.

3. Council house rent for recipients of 100% housing benefit: as above, this should be collected in person if you are close to the relevant offices, or by telephoning the rent offices in other cases.

It is helpful if you can obtain in advance the name of the person to contact should you need rent information.

4. If telephoning does not work and it is necessary to travel long distances to call in person please telephone the Field Officers to discuss the costs and other possible options. (There could be another interviewer with a quota partly or wholly within the same L.A. who is also visiting the offices).

Summary: If the rating offices and rents offices are not close to the area obtain the required information by telephone.

If this is not possible then make a personal call to obtain it.

Ring the field office if you have problems.

.....

Distance: This has been left undefined because your FES area could be a long way from the L.A. offices, but you may be able to get the information quite cheaply if you are working on another survey close to them.

However, as a guide, if you have to travel more than 5 miles (single journey) then it is definitely worth telephoning: for journeys less than this you can also opt to telephone if you prefer to.

We hope you will find this a constructive way of reducing time spent rushing to and hanging around council offices.

Telephone calls: Claim the cost of the call as per the claims handbook, using the current rates.

Time: Claim the amount of time taken. If this is excessive please put a note on your claim as to why it took so long.

Please keep us informed as to how well this revised system works.

James Laughman
17/12/86

Please clip these notes into your FES instructions book.

GENERAL INDEX (IMPROVED DECEMBER 1986)

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NB: A line to the left of page indicates a change to instructions for 1987

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

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

Useful Points to Get over to the Public

- a. This survey is carried out in connection with the annual revision of the expenditure weights for the Index of Retail Prices. It provides a list of goods and services used by most households and the proportions ('weights') each represents in the 'average family' budget. To compile the RPI, a representative selection of items is priced each month by the Department of Employment and the 'average family' budget is recalculated to see how much more it is costing to buy the same quantity of goods and services.
- b. The RPI is an essential component of the Tax and Price Index (the TPI) which combines into a single index the changes in both direct tax and retail prices. The quantity of goods and services which people can buy depends on two factors, namely (i) their residual income after paying income tax and national insurance contributions and (ii) retail prices. The TPI encompasses both these factors whereas the RPI reflects only price changes.
- c. Of particular interest to the elderly is the fact that the survey provides data on pensioner household expenditure, ie, the two Retail Price Indices for one-person and two-person pensioner households of limited means. These indices show how pensioner households are affected by price changes and help form the basis for policy decisions to improve pensioner benefits. Pensioner benefits are updated 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.

- i. 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 will be provided on request to the field officer. These can be shown to informants if you feel that they will be of use or interest to them.

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).

Publicity folder

1.3

Various documents are available for interviewer's reference and in most cases these can be shown to informants who are interested or need to be persuaded of the value of the survey. A current list is sent as a part of the 'list of contents' in your materials parcel. Further copies of any documents can be re-ordered from your field officer.

To FES INTERVIEWERS

FAMILY EXPENDITURE SURVEY

MAJOR CHANGES TO SCHEDULES FOR 1987

This paper outlines the major changes to schedules for 1987. For detailed information regarding questions you should consult your copy of the interviewer instructions (page numbers are noted below in third column).

Probably the first thing you will notice about the schedules is that they are thicker than in previous years. The prime reason for the increased size of the Household and Income schedules is that we have increased the print size and this has necessitated carrying questions that once filled a page on to a second page. Secondly we have reformatted some questions, eg gas and electricity, to make them easier. Thirdly there are some additional questions. Another change you will notice on both schedules but especially the Household schedule is that we have simplified the wording of some questions.

The diary now covers fourteen days. Each diary includes two credit card sheets. Where a person has more than two credit cards then credit card continuation pages should be left with them. This change reduces the amount of paperwork you have to handle at the interview and checking calls.

HOUSEHOLD SCHEDULE

<u>Q</u>	<u>Schedule Page No.</u>	<u>Interviewer Instructions Page No</u>	<u>Change</u>
14	3	23	There is now an interviewer check at this question. The question is no longer asked of all households. You need to check the description you have obtained from the local authority offices for entry at Q117 to see if the rateable unit area is larger than that occupied by the household. If it is then Q14 <u>must be asked</u> . This change should ease workload.
17	5	24	The collection of rent data for local authority tenants with 100% Housing Benefit now occurs only at the end of the fieldwork period.
21 & 25	6 & 7	25 & 26	These are examples of simplified wording. Note that there is no change in concept.
28	9	27	Now refers to mains water as well as mains sewerage. This is for OPCS editing.
35(d)	10	29	Year when insurance taken out is now required. This is for DHSS.
40 & 41	11	29	Another example of simplified wording. There is no change in concept.

<u>Q</u>	<u>Schedule Page No.</u>	<u>Interviewer Instructions Page No.</u>	<u>Change</u>
42	12	30	The layout of this question has changed but there is no change in concept. The year insurance was taken out is required by DHSS.
43	13	30	This is now a new layout of what was previously three questions.
44	14	30	Year insurance taken out now required for DHSS.
51-70	18-21	33-34	Layout now changed so that electricity and gas questions are divided into two separate sets of questions.
71 & 73	22 & 24	34 & 35	The vehicle use and ownership series of questions now have a filter question. This means that each spender does not have to be accounted for individually in every household.
78	28	36	You are now asked to record the number of credit cards each spender has. This will let you know how many credit cards to account for when leaving diaries Note that diaries include two credit card sheets and that if a spender has more than two cards then continuation sheets should be left.
83 & 84	29 & 30	40	The three dependent questions regarding original instalments have been dropped as has the three months rule.
86-95	32-44	42-44	There are ten new questions on expenditure over the last twelve months. These questions have been requested by the Retail Price Index Committee in order to improve data on non frequent items (see Bob Redpaths item in the September 1986 Interviewer Quarterly News Bulletin). There is some duplication between these questions and questions 83 and 84 but this can be used for checking purposes. Remember that it is not necessary to read out all prompts, merely show the prompt card.

<u>Q</u>	<u>Schedule Page No</u>	<u>Interviewer Instructions Page No.</u>	<u>Change</u>
97	46	44	At the request of many of those working in the field we are changing back to the old procedure at this question ie <u>all</u> payments by standing orders, etc should be recorded at this question
104A & 104B	50 & 51	46 & 47	The question on educational expenditure has been divided into two separate questions to ease interview.
112	56	47	There is now an introductory question which asks if any members of household are or have been an employee in the last 13 weeks This means that dependent questions no longer have to be asked of all spenders.
118(b)	59	49	The charge made for passes and permits is now asked for
<u>INCOME SCHEDULE</u>			
1	1	51-55	Please note that 'Out of employment but seeking work' now includes people unemployed for up to ten years This change from the previous five years rule is at the request of DHSS
3	2	56	This question now asks 'Have you been to work today?' This is a change in concept from previous years Question (a) is now asked of those who have not been to work ie coded 2 at Q3.
4	3	56	The wording of this question has been changed to 'When did you last do any regular paid work' and is not asked of those who are seeking their first job.
9(a)	5	57	You are now asked to code the informants occupation. You are also asked to record for employees whether they are managers supervisors or other employee as well as the number of employees in the establishment. For self employed you are asked to record the number of people they employ.
		AND CODE BOOK	

<u>Q</u>	<u>Schedule Page No.</u>	<u>Interviewer Instructions Page No.</u>	<u>Change</u>
43	19	63	The number of hours worked by self-employed people now includes both main and subsidiary self-employed jobs.
45-52	23-31	64-69	Each group of benefits has a leading filter question to speed interview. Also the wording mentions relevant prompt card. Please made certain that if the answer to the filter is 'Yes' that you have coded each of the dependent benefit questions as 'Yes' or 'No' otherwise PAB staff will not know if question has been asked.
45(b) 46(a)	23 & 24	65 & 66	These questions now have dependent questions regarding documents referred to and component parts of pension. These have been added at the request of the DHSS. Since the introduction of the Housing Benefit the FES has shown a more than expected drop in Supplementary Benefit receipts especially amongst Retirement Pensioners and Widows. As Supplementary Benefit is paid on a buff payment book it is felt that a question asking about documents consulted will provide a check on benefit receipts. At the same time as providing a check on Supplementary Benefit these questions provide a means of providing the DHSS with a check on some of the component parts of Retirement Pension and Widows Benefit. This component parts are shown only in yellow payment books. You should have been supplied either in this quota or during the last twelve months with copies of buff and yellow payment books. Remember that there is an interviewer check above these questions so the dependent questions will not be asked of

<u>Q</u>	<u>Schedule Page No</u>	<u>Interviewer Instructions Page No.</u>	<u>Change</u>
			all recipients of these benefits. These questions were successfully piloted in 1986.
51(d)	30	68	Statutory Maternity Benefit is a new benefit in 1987 and will gradually replace Maternity Allowance and Maternity Pay from Employer under the Employment Protection Act.
54(a)-(d)	30	69	These questions have been re-ordered.
54(1)	33(50)	69	This question should now be coded Yes .Y or No . X for each person in receipt of a pension at 54(a)
55 & 56	36-39	70	These questions now have a new layout with a leading filter to speed interview.
57	40 & 41	70	This question now has a leading filter to speed interview.
60	43	71	You are now asked to record whether allowance is received at time of interview.
72	52 & 53	73	This question now has a leading filter and layout to speed interview.
73(a)-82	54-59	74-76	<p>This is a new series of questions on ' liquid assets' at the request of the DHSS. PLEASE READ YOUR INSTRUCTIONS CAREFULLY. The purpose of the questions is to provide information on which an estimate of likely benefit take up can be calculated.</p> <p>The list of assets at Q.73(a) is primarily intended to define precisely which assets are to be considered at Qs 73(b) and (c).</p> <p>Information on assets such as value of house are <u>not</u> to be included.</p>

Q

Schedule
Page No.

Interviewer
Instructions
Page No.

Change

Based on the pilot study carried out in 1986 only one in five households will be asked Qs 74 onwards. The other four in five households will have either less than £1,000 in assets or more than £10,000.

If you have a refusal at any of these asset questions carry on with the interview and placement of diaries but phone the field officer as soon as possible afterwards. This is a new procedure which only applies at this series of questions. If a refusal occurs elsewhere then this constitutes non-response on the FES as in the past.

DIARY (INTERVIEWER INSTRUCTIONS PAGE 77-89)

The two weekly diaries have now been combined into one document covering fourteen days.

The separate credit card sheets have now been incorporated with the diary at pages 6 and 24. If an informant has more than two credit cards then continuation pages should be left.

You will notice on the left hand pages of diary and on credit card pages that there is an additional column for the name of shops or store. This has been added at the request of the Index of Retail Prices Committee and it's purpose is to identify purchases of food, soft drinks and alcoholic drinks brought home which has been purchased at supermarket chains and at other shops. As mentioned by Bob Redpath in the September Bulletin the information is to be used to amend the weights obtained from the FES.

Where informants are worried about obtaining or spelling the name of the local corner shop, etc. there is no need to worry as 'corner shop' will suffice.

PROMPT CARDS

Please note that all prompt cards are now contained in one book.

STOP PRESS !!

There is a new National Savings scheme called 'Yearly Plan', certificates issued under the scheme are National Savings Certificates and any income from this scheme should be treated as 'Fixed Interest National Savings Certificates'.

R U Redpath
T B Kenney

5 December 1986

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Section 3.2 and sections A1-A10 (pages 14-18) are concerned with definitions related to households, individuals and changes within households etc.

Excluded Addresses and Households

3.2

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

Public Houses

Hotels of all types

Guest Houses/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

1. 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 your field officer/assistant BEFORE COMMENCING THE INTERVIEW.

PLACING PATTERN OVER THE FIELDWORK PERIOD

4.1

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

<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 continues for another two weeks after the end of the placing month assigned to the area, while the intermediate and final calls are completed.

- a. Five addresses should be dealt with in the first or second week of the fieldwork period. Four addresses should be dealt with in each of the remaining weeks.
- 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 sixth address and if necessary to subsequent addresses, until fifth 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. Neighbours should be approached at an early stage to establish the best time to call to contact the informants, assuming the accommodation is still occupied.

Extension of Placing Interviews beyond the month

4.2

All serial numbers must be called on before the end of the field period. If any serial number cannot be contacted or interviewed during the field dates but is likely to be available within the first week after the end of the field period, it maybe possible for an interviewer to carry on up to a maximum of 7 days: permission must be obtained from your regional manager and is only meant to be used in exceptional cases as it can alter the overall placing and expenditure pattern. It must not be used to cover lack of availability (other work, etc) during the proper placing month.

Weekly quota of four (five) - 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.
- h. an address which H.Q. told you not to call on because informants refused following the H.Q. letter.

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(5) does not include a household which was originally treated as co-operating in an earlier week but subsequently refused.

Advance letters to informants 5.1

From January 1987 an advance letter will be sent to all addresses advising residents that an interviewer will be calling. You will need to amend your introduction to take this into account.

See page 104 for copy of letter.

PROCEDURE WITH EACH CO-OPERATING HOUSEHOLD 5.2

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 5.3

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

- a. how many households live at the selected address (FES household definition) (section A3, page 14).
- b. how many eligible people there are aged 16 and over within each household. (FES 'spender' defined section A5, page 15).

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 £5.00
- 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 record books (D schedules) until all spenders have been interviewed.

Starting record keeping

5.5

Record keeping should normally begin on the day of the interview or the following day.

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 record keeping period must form a continuous period of 14 days. If this is not possible or in doubt phone field officer as soon as possible.

Before the first checking call:

5.6

- 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) above, note any items which need further probing, so that these can be asked about at the first checking call.

First checking call - made on or before the fifth day. To allow for public holidays and other commitments this might occasionally need to be as early as the second or as late as the seventh 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. Diary entries including regular commitments should be checked against checking schedule as appropriate.

Further checking calls - These are left to the interviewers discretion. Such calls normally occur where the respondent requires help and the calls become essential (see Calls and Outcome record - page 98).

Final call

5.8

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 officer must be told. THIS FINAL CALL MUST NOT BE DELAYED by more than a few days.

All record books are to be checked thoroughly when collected, and queries resolved if possible. Remember particularly the checks against the checking schedule.

During the final call, after checking that all documents are complete, it is essential to explain further about the payment of £5.00. 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. initials and surname of each household member who has kept records.
- b. the household's current postal address (with postal code)

THE FES SAMPLE IS DRAWN FROM THE POST CODE ADDRESS FILE (PAF). SURNAMENAMES ARE NOT GIVEN ON PAF AND THEREFORE YOU ARE ASKED TO OBTAIN 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. You are also asked to obtain correct postal address. If informant is moving within 8 weeks also note new address on the bottom of yellow and pink pages of 'E' form.

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. You should make every attempt to arrange several collection calls together, especially those for the last week. A few days delay in collection will often not matter much, provided you explain the situation and make it clear when you will be returning. Obviously we must still rely on your judgement to decide when extra calls are needed. However, if you are worried by the conflict between quality and economy you should discuss the problem with the field officer.

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

Payments to co-operating household members (16+)

5.10

£5.00 will be paid to each eligible household member aged 16 or over provided that he and all other household members (16+) co-operate by:

- a. providing information for the household and income schedules.
- b. Keeping records for 14 days,

FAILURE OF ONE HOUSEHOLD MEMBER TO CO-OPERATE, FOR EXAMPLE BY REFUSING TO ANSWER ANY QUESTION EXCEPT ASSET QUESTIONS (WHICH MUST BE DISCUSSED WITH THE FIELD OFFICER BEFORE THE FIRST CHECKING CALL) OR REFUSING TO KEEP A DIARY 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 DIARIES ARE COMPLETE, AND INFORMANTS MUST BE TOLD THAT THE PAYMENT OF £5.00 WILL NOT BE MADE TO ANY MEMBER OF THE HOUSEHOLD. HOWEVER IF INFORMANT DOES NOT KNOW THE ANSWERS TO QUESTIONS THIS IS ACCEPTABLE AND DOES NOT CONSTITUTE A REFUSAL.

Method of Payment

5.11

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 to 5 weeks before the postal order arrives. Separate postal orders are sent where several members of the same household qualify, details of names and addresses for these being taken from the E form. All postal orders will be sent in one envelope unless the interviewer tells us this is inadvisable.

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

5.12

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. 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 you by telephone.

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Most 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 these instructions in the sections on individual questions. Background information on benefits, items of expenditure, etc are contained in the glossary at the end of these instructions.

Layout and signposting

6.2

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

- a. Type face is restricted to two types for simplicity:
 - i. Plain type for questions and answer codes,
 - ii. Bold type for question numbers, instructions, notes, signposting and important points within questions.
- b. As far as possible, 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.
 - ii. An 'Ask' direction occurs at a filter and signposts you to the next question, usually a dependent of the one just asked. It can also occur at the foot of a page as a guide to the next question to ask.
 - iii. A 'Go to' instruction directs you past one or more questions (ie the question after the next question or any question further on in the schedule).
 - iv. A 'See' instruction directs you to a question that may or may not apply to that spender. Bold type above the question to which you are signposted indicates the people or groups of people it applies to.
 - v. DNA N codes follow 'See' instructions, the 'N' 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 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.

Wording of questions

6.3

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

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

Example

Q56 'How much was your last payment under this scheme?

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

- b. Questions where precise wording is not used, eg. the Box under Q. 45 on Household Schedule.

Example

Per No	Ring Line No	Type of policy	Insurance company	OFF USE	Enter period code	If Code 9 specify period	Amount paid £ p	
01	①	Animal sickness	Animal welfare Union		8		30	00
01	②	Sickness	Friendly Society		9	4 c/mths	80	00

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

Completing the schedules

6.4

The schedules should be completed in the following way.

1. Use a pencil to record answers. Do not overwrite or rub out previous answers.
2. Leading zeros are required for dates, area number, serial number and person number. They are also required when recording number of weeks, years, percentages less than 100 etc. This is now standard SSD procedure as presented in Interviewers Handbook.
3. Reference number, date of interview and starting date of records should be entered in boxes provided.
4. Amounts of money, specific details eg age, relationship to HOH, should be entered on dotted line inside or outside coding boxes as indicated.
5. CODE PERIODS DIRECTLY INTO CODING BOXES.

A table of codes to be used is included on the back of each schedule as well as on the back of prompt card book. A leading zero is not required.

PERIOD CODE TO BE USED:-

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

If the period is not covered by the codes in 'Period Code Box' then enter code '9' and specify period in box provided.

6. Apart from recording data (money or specification of an item) and periods you should record answers by ringing codes.
7. Several questions have an 'Line Number' or 'Column 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 above).
8. Some questions (eg Q16, 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 and refer to person column if this applies, eg on income schedule or item number or household schedule.
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 89, 90, 112-114 and on the Income schedule at Qs 19, 23, 44-47, 50-52, 55, 56, 57, 60 and 72.
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. Remember to put question number and person number with the notes. Amounts of money should have a period or dates recorded beside them.
14. Where an informant agrees to get documentation to confirm amounts at a checking call list the documents to be obtained on the NCR pad supplied. One copy of list should be given to informant and one copy retained by you. Although the informant promises to produce the data later you should always obtain an estimate at the interview.
15. Enter dates as two digit codes eg June 1987 should be entered as

Month	0	6
Year 19	8	7

16. There are a number of columnar questions that now have a filter question above them eg Q 71 Household Schedule. The use of filter questions should reduce the number of questions you have to ask.

If the answer to the filter question is 'No' you should pass onto the next question as signposted.

If the answer is 'Yes' then you should ask the dependent questions for ALL of the relevant items (eg vehicles) in the household using a separate column for each item, eg if there are three vehicles in the household then three columns should be used.

17. Before each group of benefit and savings questions on the Income Schedule there is a filter question, eg Q 51. If the answer to the filter question is 'No' you should pass onto the next question as signposted.

If the answer to the question is 'Yes' you should code each of the items shown at subsidiary questions eg at Q 51 if the answer is 'Yes' you should code whether or not they received Maternity allowance, N.I. Maternity grant, Maternity Pay from employer and Statutory Maternity Pay from employer.

The use of the filter question should reduce the overall number of questions you have to ask.

Business expenditure.

6.5

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 diary. 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 Sections A4-A8 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.
- i. the households will be living at the selected address for at least three weeks from the first contact,
 - ii. travelling to the new address does not involve a separate journey of more than 30 miles for the interviewer.
- b. Where a household has a main residence abroad and a temporary residence in Great Britain and the temporary G.B. residence is sampled, then the household should be included in the F.E.S, if it will be at that address for at least one calendar month from date of interview.

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 field officer 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 could 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 date of interview.
- 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

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 (see also D15 and D16)

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 50).

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

(1) IN THE UK (ENGLAND, SCOTLAND, WALES AND NORTHERN IRELAND)

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.16 page 86).

If the records are being returned by post, the information about names and addresses (see para. 5.8) must be collected at an earlier call so that the £5.00 postal orders can be sent.

(11) ABROAD (INCLUDING CHANNEL ISLANDS AND EIRE)

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 5.8) must be collected at an earlier call so that the £5.00 postal order can be sent.

d. Where the absent spender is a spouse

See notes for Q 61 Income Schedule - page 71.

e. Money received from spouse who is not a member of the household

See notes for Q 61 Income Schedule - page 71.

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 50). Details of allowances, etc to spouse should also be entered at Q61 Income Schedule.

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 60. (EXCEPT WHERE THE NON-HOUSEHOLD MEMBER IS A SPOUSE OF A HOUSEHOLD MEMBER, IN WHICH CASE ALLOWANCE SHOULD BE ENTERED AT Q 61).

ANY OTHER CASE SHOULD BE REFERRED TO FIELD OFFICER 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 60 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 60 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 book 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 £5.00

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 60 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 60 of the household schedule.

Member too ill/taken into hospital after starting records - provided his interview information and record book is 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.

ii. If the rest of the household do not continue with the record book, 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.

g. Doubts regarding payment

Any cases where there is a doubt about whether or not the household will be paid should have a note pinned to the front with a request that the regional office pass the documents to the field officer for further action.

Collecting expenditure information from households recently
moved or formed

A10

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) to the right the date of interview box.

Enter date of interview in boxes eg 3 May 1987
should be entered as

0	3	0	5	8	7
---	---	---	---	---	---

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 starting date of records in boxes eg 4 May 1987.
should be entered as

0	4	0	5	8	7
---	---	---	---	---	---

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. The new dates should be entered to the right of date boxes.

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
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.

Age now

ITEM 4

This 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 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 Q103-106).

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 4 - State Schools - Secondary this includes all courses up to and including 'A' level at state secondary schools. This means that a child taking 'A' levels at secondary school should be coded here. (See code 7 for courses up to and including 'A' levels taken at sixth form colleges, tertiary colleges or further education colleges.

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.

Private and independent nurseries should be included here.

Code 7 - Non-advanced further education

This includes all courses up to and including 'A' level where courses are taken at a sixth form college, tertiary college or further education college. Where the course is taken at the child's normal secondary school this should be coded '4' or '6'.

Courses included in addition to 'A' level are 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 - Higher education

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

Code 9 All other higher education eg polytechnics This code covers all higher education, ie degree or degree equivalent taken at institutions other than universities. The most frequent institution likely to occur at this code is the polytechnic. Courses 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.

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

Age at which full-time education completed

ITEM 7

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

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

Benefit unit

ITEM 8

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

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

Do not code 'office use' columns.

Spender

ITEM 9

Ring 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. (See section A5 page 15 for spender definition).

D Record completed

ITEM 10

Code 1 must be ringed for each spender coded in item 9, when a completed D record is received at the end of the 14 day period. If at the final collection there are no completed book for any spender, field officer 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, and a request that the documents be passed to the Field Officer for further action.

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

Note that order of rooms has changed for 1987.

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 of grid as applicable.

Rooms used partly for business should be priority coded ie there should be no duplication. This means that if a living room is used partly for business it should be entered only once as a room used partly for business and NOT again as a living room.

Other rooms specify

Qs 12 & 13

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

1. Name of room
11. Whether there is a window
111. Use to which room is put
- 1v. Whether the room is used throughout the year

Rooms in rateable unit not yet accounted for

Q.14

NOTE INTERVIEWER CHECK FOR 1987

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 Q 117 is matched in full by the total number of rooms at Q12 and Q13 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 Q117 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.

HOH: Years lived at address

Q 15

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

Type of tenure

Q 16(a)-16(d)

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

Rented accommodation

Q 16 (a)

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

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

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

Owned accommodation

Q 16(b)

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

Rent free accommodation

Q 16(c) & (d)

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

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

If coded No 2 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

Mobile homes (caravans/portakabins etc)

Q 16(a)-(d)

Mobile homes can be rented, rent free or owned outright.

Owned outright should include mobile homes being purchased on a credit agreement.

Details of the credit agreement should be entered at Qs83-85 'A' schedule.

Mortgages are not available for mobile homes.

A ground or site rent is normally paid for a mobile home (see Q30).

100% Housing Benefit/Rent Rebate/Rent Allowance

Q 17

Note change in procedure for 1987

- NB
1. Housing Benefit is a term covering rent rebate, rent allowance and rate rebate.
 2. Q17 is related to 100% Housing Benefit cases. Q21 deals with less than 100% cases in regard to rent and Q25 deals with rate rebate.

We do not ask local authority or New Town tenants the amount of 100% Housing Benefit because we have found that they can not give answers in sufficient detail. Therefore, if the answer to Q17 is 'Yes..1' check at Q16(a) to see if accommodation is rented from local authority or New Town Corporation (code 1). If it is, then record the address reference number on Housing Benefit form HB/1. At the end of the fieldwork period you should go to the local authority rent office and obtain full details of rent payable on property and enter these on form HB/1. When you have completed HB/1 you should send it to the office. DO NOT HOLD UP FIELD DOCUMENTS FOR HOUSEHOLDS WHILE WAITING FOR THIS INFORMATION (see also notes at Qs115-118.

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'

Where a local authority office will not give rent details you should refer to notes for Qs115-118 in these instructions to see what action must be taken.

SEE SPECIMEN HOUSING BENEFIT NOTIFICATION FORM ON PAGE 103

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, allowances or housing benefit

Q. 21

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

Rebates are normally deducted from rent ie rent payable is reduced.

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 Q50(d)).

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(a) 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

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.

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

If an informant says he pays calendar-monthly, check whether he makes 08, 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.

Rates rebates/Housing benefit (ASKED OF ALL HOUSEHOLDS)

Q. 25-26

NB These questions are asked of all households including those on 100% Housing Benefit

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). If a combined rent and rate rebate has been received which cannot be itemised enter total at Q21 and make notes at Q21 AND Q25.

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).

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

Housing benefit supplement

Q. 27

Housing Benefit supplement is not a separate payment but forms part of Housing Benefit.

Where Housing Benefit Supplement is received Supplementary Benefit cannot be received at the same time.

Because informants will have little knowledge of Housing Benefit Supplement a high number of 'DKs' can be expected at this question.

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 HOUSING BENEFIT NOTIFICATION FORM ON PAGE 103

Mains sewerage/Mains water supply

Q. 28

NOTE CHANGE OF QUESTION FOR 1987

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.

The majority of households are connected to the mains water supply but there are a significant number of households in country areas which are not connected.

The purpose of Q28 is to indicate whether sewerage and water rates poundages should be added to data file by the computer.

Water/sewerage/environmental rate payments

Q. 29

If an informant says that he pays calendar monthly, check whether he makes 08, 10, 11 or 12 payments a year.

If water and/or sewerage rate are paid direct to water authority or local authority they should be entered here. If paid with domestic rates they should be included at Q.24. If included in rent they should be entered at Q18 or on form HB/1.

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.

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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**

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. 79 etc.

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**

This question should be coded according to the current arrangement ie code as interest and principal mortgage (code 2) if even if no principal is being paid off at present but the current arrangement is interest and principal, eg this can happen at the beginning of a mortgage. Where the arrangement has been changed on a temporary basis because of unemployment or sickness and only interest is being paid off then code as interest only mortgage (code 1) as this is current 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, ie. 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, ie main mortgage and smaller top-up mortgage, and one is interest only and one interest and principal.

Interest only mortgage payment

Qs. 33-35

NOTE CHANGE TO Q35(d) FOR 1987

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)-d) 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.

Interest and capital/principal mortgage payment

Qs. 36-38

Interest at Q38 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.

How many years has the mortgage run/to run

Qs 39 & 40

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

Mortgage payment, standard tax relief deducted

Q. 41

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

Up to April 1983 the tax relief was always obtained by a reduction in income tax paid. This was by means of PAYE coding for employees or tax assessment for self-employed. 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 (29% 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

NOTE CHANGE FOR 1987

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/personal possessions

Q. 43

NOTE CHANGE FOR 1987

Use a separate column for each policy.

Where there is a combined structural and contents policy at (a) then (d) and (e) must be answered.

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

Maintenance contracts for central heating should be included at Q88.

Life assurance death/endowment policies

Q. 44

NOTE CHANGE FOR 1987

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 when the policy was taken out. This indicates both whether tax relief is being received and the cash value of policy.

Other insurance policies

Q. 45

This question includes Friendly Society policies for sickness, etc. Friendly Society life and endowment policies go at Q44.

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

Include works sick clubs.

Your (part of this) accommodation

Q's 46-70 etc

Starting with Q. 46 the phrase 'your (part of this) accommodation' is used. This phrase appears at questions 47,51 and 61. 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

Q46

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

It is essential that all T.V. sets, video recorders, home computers and T.V. games in the accommodation are accounted for.

Where an item is owned or used only by a child under 16 it should be entered under one of the parents person numbers.

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, Spectrum, Commodore 64, Amstrad.

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.

TV Slot meters

Q. 46 (1c), (ci), (cii)

Excess money in TV slot meters is often used to finance the purchase of other consumer durables such as washing machines. If informants mention that they are buying any goods in this way, the information should be entered at Q. 79-84 giving full details. The rebate BEFORE any deductions should be entered at Q. 46(ci).

Telephone account payment

Q. 47

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.47(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.

Possession of durables and central heating

Q. 49-50

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.

If central heating is by oil Q50(a) must be asked.

Expenditure on oil for central heating

Q. 50 (a) (i)

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.

Electricity and gas payments

Q51-70

NOTE ELECTRICITY AND GAS QUESTIONS HAVE BEEN SEPARATED IN 1987

Questions on electricity are numbered 51-60

Questions on gas are numbered 61-70

Method of payment for electricity/gas

Q. 51(a)&61(a)

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

Account payments - Payments on a quarterly basis (or two-monthly in Scotland) which 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.

Slot meter - rebate for electricity/gas

Q.52(a)&62(a)

Enter the total amount of rebate at Q. 52(a) or 62(a). Where the household has HP commitments which are paid from the meter rebate, make certain that the amount at Q52(a) or 62(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 79-85.

Account - amount shown on account

Q.53 & 63

It is the cost shown on the account which should be entered at Q53 or 63 ie the actual cost of fuel and standing charge during the period of the account plus meter rent and installation.

Any hire purchase or credit sale amounts shown on account should not be included here but at Qs79-85.

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

The period covered should be shown at Q54 or 64.

The date of the account should be shown at 55 or 65.

Board budgeting scheme - agreed payments

Q.56&66

At Q's 56 or 66 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.

The period covered should be shown at 57 or 67.

Board budgeting scheme - amount charged on advice

Q.58&68

It is the charge shown on the advice 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 59 or 69.

The date of the advice should be shown at 60 or 70.

Vehicles - current ownership and usage

Q. 71

Ask Q71(a)-(g) for vehicles currently owned or used continuously.

'Continuous use of' includes cars supplied by an employer, spouse's employer etc. It does not include hire cars used from time to time eg holidays or weekends.

Self-employed informants cannot have a car supplied by their business although they may have a 100% refund of expenses.

A car registered in a husbands name but used continuously by a wife should be coded as owned by husband.

EXCLUDE any vehicles bought and sold as part of business. 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.

Q71(h). This question only applies to cars for continuous use. Do not include cars purchased from employer.

Petrol provided for private motoring

Q. 72

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 - owned or used in last 12 months

Q73

This question applies to vehicles owned or used continuously in the last 12 months but no longer owned or used.

The rules covering ownership, continuous use etc are the same as for Q71.

Vehicles sold in the last 12 months which are not part of a business should be shown at Q73 AND Q75.

Vehicles purchased

Q. 74

Asked of all who have owned a vehicle in last 12 months (Q71 or 73)

Include at this question only vehicles purchased by cash or cheque outright or by a loan from relative, friend or bank OVERDRAFT. Cars purchased by other formal types of credit must be entered at Q.79-85.

Check that vehicles mentioned at this question and credit questions 79-85 are accounted for at Q 71 or 73.

Q74(d) The cash price required at this question is the full amount required by the vendor before reducing the price to allow for part exchange or trade-in.

Q74(f) Any amount allowed as part exchange or trade in should be shown at this question.

When a net price is required by an FES user they can obtain this by deducting the amount at 74(f) from the amount at 74(d).

Vehicles sold

Q. 75

Asked of all who have owned a vehicle in last 12 months (Q71 or 73)
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 Q73.

Refunds of vehicle licence

Q. 76

This question is asked of all spenders.

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

Season ticket

Q. 77

Please ensure that information recorded here is not duplicated at Q.102 'travel to school' or at Q63 on the Income Schedule 'OAP concessionary fare passes'.

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.

Where a season ticket is obtained on credit it should also be shown at credit questions Q79-85.

Credit cards

Q. 78

NOTE CHANGE FOR 1987

This question should be coded Yes ... 1 where at least one spender possesses a credit card. The procedures for recording Credit Card Account Payments are covered in instructions on Diary Record.

Code Y 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, charge-cards option account cards or cards issued for budget accounts, etc. (See below).

Note that for 1987 we wish to know how many credit cards each spender has.

Acquisitions by credit

Q. 79-85

NOTE CHANGES FOR 1987

These questions cover acquisitions by different forms of credit.

Qs. 79-82 are designed to establish the different forms of credit being used and the number of agreements. If no credit agreements in household code 'No to allX'.

Q. 83 is concerned with details of credit purchases for agreements coded 1 & 2 at Q. 79

Q. 84 is concerned with details of credit purchases for agreements coded 3 at Q.80.

Q. 85 is concerned with details of credit purchase for agreements coded 4 & 5 at 81

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 informant to look up loan documents or repayments card. This is particularly important at Q's 83 and 84.
- ii. A single code only should be ringed in each column of Q. 79-82 combined. This will enable you to see how many agreements you have to collect data on, their type and whether a deposit only has yet been paid.

Bank or finance house direct

Q. 79

Where an informant has a H.P. agreement and pays the money direct to a finance house the agreement should be coded at Q79. If the money is paid to a retailer then treat as H.P. at Q80.

Two types of loan from banks/finance houses which should not be included at this question one:-

- i. overdrafts - these should not be shown at Q. 79 at all (if used to purchase car see Q. 74 otherwise ignore).
- ii. second mortgage - see next section.

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

Q. 79

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

Q. 79

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

Q. 80

Hire purchase agreements arranged directly through a finance house should be coded Finance House Loan Q79.

Chargecards, budget and option accounts

Q. 81

Charge-cards should be treated in the same way as budget and option accounts at Q81 and Q85. In addition all acquisitions made by chargecard during the record keeping period should be recorded in diaries with the word 'chargecard' written beside entry.

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

Q. 81

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 (eg. Universal, Littlewoods)

Q. 81

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 Q64).

An HP or credit sale agreement arranged by a mail order firm should be coded at Q80.

Other mail order organisations direct

Q. 81

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

Q. 81

HP agreements with a check trader should be coded at Q.81.

Loan agreements with a check trader should be coded at Q79.

Other person or organisation

Q. 81

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. 82

If an informant has made a downpayment on an item or service and not yet paid an instalment, code Y in the next blank column on the page. After coding Y find out the type of agreement at Q79-81 and code the type of agreement at the appropriate question question in the next blank column on the page.

This enables us to know that the agreement coded after the Y at Q82 is one without instalments.

If a downpayment has not been paid on a new agreement code 'NoX'

NOTE CHANGES FOR 1987

Q.83 is concerned with loans coded 1 or 2 at Q 79 and Q 84 is concerned with hire purchase and credit sale coded 3 at Q 80.

- 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. See check on Checking Schedule.

- iii. Description of item bought should be specific. For example, 'Home improvements' is too vague; enter 'double glazing', 'addition of bath', built-in wardrobe, cooker etc. State whether carried out by contractor or D.I.Y.

The description 'Wedding expenses' is also too vague. We have to know estimates of the amount spent on individual items eg Car Hire, Food, alcohol, Video camera, photographer, band, hire of hall.

- iv. Car leasing should be treated as car hiring and not car purchase on credit.
- v. Instalment repayments covering more than one item at Q's 83(e) and 84(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 £1,000 and £1,500) and an additional garage to the house (cash price £5,000) the entry should be:

Furniture £2,500 in first column

Additional garage (contractor) £5,000 in second column.

If £8,000 was borrowed to pay for these items which total £7,500 there would be a cash residue of £500. A note must be made of any part of such an amount which is not used for the purchase of a specific item.

- vi. Where an instalment covers different items which are in separate columns the instalment should not 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.

<u>Col 1</u>	<u>Col 2</u>	<u>Col 3</u>
£120.00	Combined Instalment	Combined Instalment

- vii. Remember it is essential that all money borrowed is accounted for even if only as a cash residue.
- viii. If the informant mentions at 83(e) that they have taken out a loan to pay off previous loans, do not try to find out what earlier loans were for.

Make a note of the purpose of the loan and then complete 83(f)-(h).

- ix. If the informant mentions at 83(e) that they have a 'cash flow account', 'top-up loan' or 'rotating loan' note this fact but do not attempt to obtain full details. A cash flow account, etc allows a person a specific amount of cash linked to their monthly payments. When the person has some credit they can spend this on whatever they like.

Credit agreements coded at Q.81

Q. 85

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. The word obtained meaning the date when goods were received from club or clubs agent. The details required regarding the goods acquired are the same as those required for diary items see pages 77-88

This is a new series of questions introduced in 1987 to meet the requirements of the Retail Prices Index Advisory Committee in improving the Index of Retail Prices by extending the period covered from 14 days to 12 months.

The items covered by these questions are large infrequently purchased items and thus often missed by relying only on a 14 day diary.

Questions are asked of all spenders.

Second dwelling

Q 86

This is a filter question for Qs 87-90

If a spender has a permanent second dwelling in England, Scotland, Wales or Northern Ireland (coded 1 at 86 and 1 at 86(a)) then Q 87-90 should be asked of main dwelling AND second dwelling.

INCLUDE AS SECOND DWELLING ONLY PERMANENT ACCOMMODATION SUCH AS HOLIDAY HOME OR TOWN FLAT, FIXED CARAVAN, BEACH BUNGALOW IN WHICH ONE CAN LIVE PERMANENTLY.

INCLUDE AS MAIN DWELLING ANY ACCOMMODATION TO WHICH THE HOUSEHOLD OR A HOUSEHOLD MEMBER MAYBE MOVING (EG ON MARRIAGE)

EXCLUDE AS A SECOND DWELLING A PERMANENT SECOND DWELLING OUTSIDE ENGLAND, SCOTLAND, WALES AND NORTHERN IRELAND (CODED 1 AT 86 AND 2 AT 86(a)), ie WE ARE ONLY INTERESTED IN SECOND DWELLINGS IN THE UK.

Installation of central heating

Q 87

Include at this question initial installation as well as total replacement of a central heating system eg where a warm air system is replaced by a radiator system DO NOT INCLUDE REPAIRS WHICH INCLUDE PARTIAL REPLACEMENT. THESE SHOULD BE ENTERED AT Q 88.

Include extension of central heating system at this question.

Where installation was part D.I.Y. and part by contractor (coded Z at (b)) enter separate amounts at (c).

Details for a second dwelling should be entered in left hand margin.

D.I.Y. costs can be expected to be estimates.

Repairs, servicing and maintenance of central heating

Q 88

Include at this question routine servicing and maintenance as well as repairs to a system that has gone wrong. Include maintenance contract payments eg Gas Board schemes.

Where maintenance etc is part D.I.Y. and part contractor (coded Z at (a)) enter separate amounts at (b).

Details of second dwelling should be entered in left hand margin.

D.I.Y. costs can be expected to be estimates.

Extensions, improvements and enlargements (Prompt card 'A')

Q 89

Do not prompt list but refer informant to prompt card 'A'.

If part D.I.Y. and part contractor enter two amounts at (b).

Ring code '1' in first column for main dwelling and '2' in second column for second dwelling.

Where the item of improvement is not on the list but cost £50.00 or more specify in detail.

Repairs, maintenance, replacement and decorations (Prompt card 'B')

Q 90

Do not prompt out list but refer informant to prompt card 'B'.

If part D.I.Y. and part contractor enter two amounts at (b).

Ring code '1' in first column for main dwelling and '2' in second column for second dwelling.

Where repair etc is not on list but cost £50.00 or more specify in detail.

Holidays

Q 91-95

Please make sure that Qs 91-95 are asked of all spenders.

Package or self-catering holidays in U.K. or abroad

Q 91

This is a filter question for Qs 92 and 93.

Package holiday in U.K. or abroad

Q 92

Use a separate column for each holiday.

Note that at (b) allowance is made for more than one payment per holiday.

Note that at (d) (i) the amount of money spent abroad on the holiday over and above the cost of the package is required. It is almost certain that informants can only give rough estimates.

Self-catering holiday in U.K.

Q 93

This question should only include expenditure on self-catering holidays arranged through someone else eg holiday company.

EXCLUDE: Self-catering holidays in own caravan or boat etc and visits to relatives.

Note that (a)-(c) are asked only if the holiday is in England, Scotland, Wales and Northern Ireland.

Provision is made at (c) for more than one payment for a holiday.

Holiday at hotel, boarding house, holiday camp etc in U.K.

Q 94

Note that (a)-(c) are asked only if holiday is in England, Scotland, Wales or Northern Ireland.

Provision is made at (c) for more than one payment for a holiday.

Other holidays outside the U.K.

Q 95

This includes all holidays outside England, Scotland, Wales and Northern Ireland EXCEPT package holidays mentioned at Q 92.

Note that expenditure at (a) refers only to money spent abroad. Money spent in this country in preparation for the holiday should not be included.

Provision is made at (c) for more than one payment on holiday.

Bank charges

Q. 96

THIS QUESTION IS NOT CONCERNED WITH DEPOSIT ACCOUNTS, ETC WHICH ARE SAVINGS ACCOUNTS AND DEALT WITH ON THE INCOME SCHEDULE. (Q.55)

Where there is a joint account enter details in both holders columns for 96 and 96(a). Enter details for 96(b) only under one of the persons concerned. Do not try and apportion service charges, etc between account holders. Note in the margin that it is a joint account.

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 bank budget accounts should not be included at this question.

Standing orders and direct debits

Q. 97

NOTE CHANGE FOR 1987

For 1987 this question returns to the old format whereby it is asked of all items not just those already mentioned.

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 as well as AMOUNT of annual service or interest charge.

Payments made to 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. 78 and instructions on credit card account payments in diary.

Prescriptions - items acquired free of charge

Q. 98

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.

Liquid welfare milk and free school milk

Q. 99 and 100

a. Liquid Welfare Milk (Q 99)

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 (Q 100)

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.

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

Note at 101(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.

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 77 (season tickets).

Note that at 102(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 103, 104A and 104B refer to spenders and children considered to be in the household for FES purposes.

Q 105. This question is to be asked of all spenders.

Q 106. This question is asked only where there is a person in the household who is aged 14-18 in a state secondary school or in Non-advanced further education. See glossary for note on Technical and Vocational Initiative.

Q's 107-111. 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. Children in this age group applying for grants normally have their application assessed against parents income.

At Q's 103 and 109 EXCLUDE parental contribution towards making up a grant to full amount set.

At Q's 104A and 108 INCLUDE parental contribution towards making up a grant to full amount set.

- NB 1) Entries in diary regarding payment of fees have to be cross checked with these questions to ensure that course a is mentioned here if attended prior to interview.
- 2) Where the level of examination or course is not known at 103(h), 104A(d), 104B(c), 105(b) and 111 record the name of the examination.
 - 3) At 103 and 109 ask (c) OR (d) depending upon source of grant. Do not attempt to ask both
 - 4) Where a child is aged 16 or over and in the household has fees paid by parent or guardian in the household, enter details under child's person number
 - 5) Gifts of money (e.g. pocket money) over and above amounts required for education should be excluded from Q's 103-111 and shown in diary record when given.

'A' schedule expenditure refunded by employer (prompt card 'C') Q.112

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

Money received for items of regular household expenditure Q.113
(prompt card 'D')

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.114.

Direct payment of regular household expenditure Q.114
(prompt card 'D')

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.50(d) Income Schedule).

NOTE CHANGE IN PROCEDURE FOR 1987

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. Q115-117
2. Details on O.A.P. concessionary bus fares Q118.

B. The following information is required from local rent or housing office at later call. (See also notes at Q17).

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 and record on form HB/1 at end of fieldwork period (see Q17). 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. In addition section 27.20 of the 'Housing Benefit Guidance Manual' (HBGM) also contains references to your need for this information. Copies of these references are contained in these instructions on pages 105-109

Where a local authority office will not give rent details would you please phone June Langham (2306) or Terry Kenney (2190) and provide the following information:

- 1) Full addresses and reference numbers of all addresses concerned
- 2) Name and initials of person who will give authority for information to be released
- 3) Rank of person (e.g. Housing Director) who will give authority
- 4) Full address INCLUDING FULL LOCAL AUTHORITY NAME of person who will give authority
- 5) Telephone number of person who will give authority
- 6) Type of objection raised by staff you saw at local authority office.

- NB
- a) Please check spelling of name and address
 - b) Always let us know all addresses concerned.

We will telephone or write to local authority for information.

Rateable values and description

Q. 115-117

It is essential that rateable value at Q. 115 and Q. 116 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 in rateable unit (see Qs. 12, 13 & 14).

NOTE CHANGE FOR 1987

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.

For 1987 we need to know also the amount charged for the pass or permit and the period covered by this charge.

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.

Final check and special circumstances

Q. 119

Checks at top of page 60 should be completed and details of special circumstances recorded.

Period Code List

BACK PAGE

This should be used as an aid for coding period at questions on the schedule.

SECTION INDEX

Income schedule introduction (B).....	50
Income schedule Q1-Q82.....	51-76

- 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 £5.00 will be paid to each spender is that we are given details of 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.71 & 72 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 pink 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 section 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. Remember to record 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 £5.00 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.

If the informants cannot separate their individual amounts then enter the amount in the first relevant persons column and make a note that the amount is joint income.

- e. Note that from 1987 each series of benefit and investment questions has a leading filter question asking whether informant has received any benefit or investment income from a list shown on a prompt card. If the answer is 'No to all' then you do not need to prompt the benefits or investments in that series. If the answer is 'Yes' you need to code 'Yes' or 'No' for each benefit or investment.

The prompt cards for state benefits have been combined with other prompt cards and there is therefore only one prompt card book.

- f. 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 on the front page and on all pages where information is coded or recorded. Keep the same person order throughout schedule.

B Schedule Questions

Detailed points on questions are as follows

Employment Status

Q.1

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

Note that the Government has several training and subsidy schemes in operation at the present time. Individuals on these schemes will normally receive an allowance, but in some cases a wage will be received. The basic principle to be followed is that if a wage is received, the informant should be treated as an employee. If an allowance is received, the informant is to be treated as unemployed (See Q1(b)). If Enterprise Allowance received, treat as self-employed.

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

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

Employee (Code 1)

Q .1 (a)

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 a limited 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.60 and treated as allowance from an organisation.

Self Employed (code 2)

Q. 1(a)

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 64 Child minders are treated as self-employed.

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

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

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

Q. 1(b)

NOTE CHANGE FOR 1987

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 receiving unemployment benefit but not seeking work they should be coded 3.

From 1987 persons unemployed for more than ten years (520 weeks) should be coded '7' as 'None of these'.

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^ø

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, 9(a), 9(b), 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.

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

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

+ This includes self-employed receiving an Enterprise Allowance.

Permanently sick or injured (code 5)

Q. 1(b)

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

Retired (code 6)

Q. 1(b)

It is difficult to provide a precise definition of who is to be included in this category. In general the informant's word should be accepted, however there are exceptions which are given below. 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 and should be coded 7.

It sometimes happens that informants say that they are 'retired' but when asked Q50(b) are, in fact receiving N.I. Unemployment benefit which means that they should be looking for a job. In such cases it is important to go back to Q1(b) recode as 3 (unemployed) and then ask the relevant questions.

Also recode as 3 and ask relevant questions of those who volunteer the information that they would take a job if one was offered to them.

An informant who has left work early on a Government Job Release scheme should be treated as retired at Q1(b)

None of these (code 7)

Q.1 (b)

NOTE CHANGE FOR 1987

"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.

NB Anyone who has been unemployed for more than ten years (520 weeks), and coded 3 at 1(b) should be recoded 7 at 1(b) and relevant questions asked.

Paid work in last 12 months

Q.2

This question applies to those coded 1 or 2 at Q 1(a). Work here is to be regular arrangements and not odd jobs. Odd jobs should be entered at Q 70.

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

Exclude periods when on strike.

At work on day of interview

Q.3

NOTE CHANGE FOR 1987

Note that for 1987 the wording of this question has been changed and now asks whether they have been to work on day of interview, however the sense of this question has not changed. Only code 2 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

Asked of all coded 3 or 4 at 1(b) EXCEPT those who have not worked before eg school, college and university leavers.

This refers to the total number of weeks away from work without a maximum. 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 70.

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

NB Anyone who has been unemployed, for more than 10 years (520 weeks), and coded 3 at 1(b) should be recoded 7 at 1(b) and relevant questions asked.

Retirement in last twelve months

Q.5

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

Looking after sick or aged relative

Q.6

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

Permanently unable to work

Q.7

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

Paid work in last 12 months

Q.8(a)-(c)

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

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 70 for details of odd jobs.

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

Most remunerative and subsidiary employment

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

NOTE CHANGE FOR 1987

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, eg coded self-employed when most remunerative job is as employee then recode Q1(a).

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 of limited companies 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.

Note that for 1987 we wish to know for employees their position eg Manager and the number of employees at their place of work. For the self-employed we wish to know how many employees they have. This is so that we can code socio-economic groupings to make the FES compatible with other surveys.

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.

Directors/Self-employed

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

Directors of a limited company are to be treated as employees because they are legally employees of that limited company no matter how small it is.

There are some difficult cases however where an informant will be legally an employee of the limited company of which he is a director, but for accounts purposes handle the income, tax and National Insurance contributions, etc as if self-employed. In these cases you should record him as an employee at Q1-9(b) but enter details of income, tax and N.I. as if he is self-employed. Where this occurs please make full notes so that the office is aware of the circumstances.

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 record at checking call 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 top of page 9 on the income schedule 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 or Statutory Maternity Pay this should be ignored and last full pay entered. See notes for Q51(c) and (d).

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 pink 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

NOTE CHANGE FOR 1987

For 1987 note that if details of anticipated pay are given then code '1' at Q10 must be ringed.

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 6/5/87. They state that they were last paid on 16/4/87 ie over two weeks before interview. The reason given for this is, that when last paid on 16/4/87 they were paid three weeks money to cover their holiday period and therefore they were not paid on 23/4/87 or 30/4/87.

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 1986, employers have been paying the first twenty-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 Qs 23,47 & 48).

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.

Other deductions from wage/salary

Q. 16

Note that where an amount is entered the code above the amount must be ringed.

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 4. If a pay slip for a date other than that at Q 10 has been consulted by you or by the informant, code 3.

If coded 1, 2 or 3 ask for (or enter) gross wage from pay slip at 16(a)(i).

Do not add totals at Qs 11-16 if gross wage is not shown on pay slip or code 4 has been ringed.

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

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 record will also be refunded and should be entered on page 40 of record books.

If a fixed or mileage allowance for vehicle has been received, then page 40 of record book 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.

See notes above for thirteen week rule and general note on refunds (page 60).

Specified car expenses

Q. 18

The amount included in last net pay should be entered.

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

See notes above for thirteen week rule and general note on refunds (page 60).

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

Q. 19

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

See also Q112 on Household Schedule.

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

See notes above for thirteen week rule and general note on refunds (page 60).

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 at this question see notes above for thirteen week rule and general note on refunds (page 60).

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 'F')

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.

Usual pay

Q. 24

If a code has been ringed at Q.23, the informant would be expected to answer 'No1' at Q.24 and usual pay given at Q.24(a) and (b).

Occasional additions to pay (bonus, etc) in last twelve months

Q. 25

NOTE CHANGE FOR 1987

This amount should cover the total additions to pay received in the last 12 months not just the last bonus received.

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 (bonus, commission and motoring expenses etc) included in usual net pay

Qs.26 & 27

These are asked of those whose last pay was not usual. Informants may not have included a bonus in their usual net pay, it is necessary to ask if they have.

Where bonus(es) have been included, ask informant to estimate amount of bonus(es) included.

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.

See notes on page 60 regarding 13 week rule.

Luncheon vouchers/meals/food supplied free

Q. 29-31

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

The notes at Qs 17-20 also apply to this question except for the thirteen week rule.

Self employed income

Q. 38

Where the informant has been self-employed for too short a period to have any figures available code as DK BUT make a note of the last occupation the informant had before becoming self-employed and the income received from that job.

Where the informant can only give figures for a period of less than a year, these should be recorded.

Note that if the answer to this question is 'Nil Profit', 'Loss' or DK then Q39 must be asked.

Self-employed - money drawn from business

Q. 39

The purpose of this question is to ascertain income from the self-employed job when the answer to Q 38 is 'Nil Profit', 'Loss' or 'DK'.

Note that if Q39(a), (c)(i) or (d) are answered 'DK' you should go to Q 40.

Total turnover

Q. 40

Is asked of all answering 'Don't know' to Q. 39(a) or Q.39(c)(i) or 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 cash amount at (a), then obtain a percentage or proportion of the amount the partner expects to receive.

Total hours worked

Q.43

For 1987 if an informant has main and subsidiary self-employed jobs the hours worked in both jobs should be added together to provide an answer to Q43.

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

NOTE CHANGE FOR 1987.

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 by ringing code and enter estimate of claim. DO NOT LEAVE BLANK. If the answer is 'No' to all items ring 'No to all, code Z'.

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 40 of the diary record and 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 = £70 p.a. on a total expenditure of £400 p.a.
- b. If percentage or amounts cannot be given please ask for which items a claim has or will be made. Indicate these on the schedule by ringing code and note that informant cannot give amount or percentage.

NOTE CHANGES FOR 1987

110
SEE LIST ON PAGE 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 only 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 (Q50(d)). The inclusion of Supplementary Benefit with another benefit is noted at the front of the payment book or on 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 only made in multiples of a week eg 2 weeks, 4 weeks, 13 weeks.

Since the introduction of Housing Benefit it has become increasingly difficult for informants to separate Supplementary Benefit and other benefits. D.H.S.S. has provided us with examples of payment books to help informants and you distinguish Supplementary Benefit, other benefits and the component parts of Retirement Pensions (Q45(b)) and Widows Benefit (Q46(a)).

There are two examples, one buff in colour and the other yellow.

Buff books are used to pay Supplementary Benefit only or Supplementary Benefit plus other benefits. 'Supplementary Pension' for those over retirement age will be written at top of page 3. If an other benefit is being paid on the book then the name of that benefit and the amount of that benefit being paid will be written on page 3.

Where Supplementary Benefit only is being received then at Q50(d) you should enter the amount of benefit shown on payment orders (page 5 etc).

Where Supplementary Benefit plus another benefit are being paid you will need to do a calculation. The total combined payment is shown on the payment orders (page 5) and from this should be taken the amount of other benefit (eg Retirement Pension) shown on page three. The difference will be Supplementary Benefit for entry at Q50(d) while the amount for other benefit on page three should be entered at the relevant question (eg Q45(b)).

Yellow books are used for benefits other than Supplementary Benefit. Therefore if an informant has a yellow book you can be assured that Supplementary Benefit will not be included in that book although it could be in a separate buff book. On page three you will find the name of benefit or benefits being paid on the book plus a series of code letters. The key to these code letters is given on page two of the book.

If only one benefit is being received then the total amount for that benefit should be entered at the relevant question. If more than one benefit is being paid then a calculation is necessary; for example if Retirement Pension and Attendance Allowances are being paid then the amount shown against code letter 'H' is Attendance Allowance and should be entered at Q46(e). This amount should be deducted from the total combined amount shown on payment order (page 5) and the difference entered at Q45(b) as Retirement Pension.

The initials will need to be referred to when recording component parts of Retirement Pension (Q45(b)) and Widows Benefit (Q46(a)).

Points to note

- 1) An informant may receive Supplementary Benefit and another benefit in separate books eg Supplementary Benefit in a buff book and Retirement pension in a yellow book.
- 2) An informant may be receiving one benefit in a payment book and for some reason another benefit by Giro.

Instead of receiving payment by book or giro an increasing number of people who are not on Supplementary Benefit are receiving their benefit by direct transfer into their bank or building society accounts. These informants will have been sent forms BR2198 or BR2199 advising them of the amount of benefit they are receiving.

See example of BR2198/9 on page 66.

Retirement Pension and Widows Benefit

Q45(b) & Q46(a)

For 1987 these questions have been extended at the request of the DHSS.

State benefits received are often made up of component parts and the DHSS would like to know the amount of some of these parts contained in the total benefit recorded on the FES. Because it would be impossible to do this without reference to documents you are asked to check whether documents are being consulted before asking the new questions. Note that you are not expected to 'push' the informant to produce documents if they are not already doing so.

At Qs45(b)(iii) and 46(a)(iii) you should check what documents have been consulted to give the information at Q45(b)(i) and (ii) or 46(a)(i) and (ii). If documents have been consulted you then record the answers to 45(b)(iv) and 46(a)(iv).

The amounts for recording at 45(b)(iv) and 46(a)(iv) will be shown on page three of the yellow book or on form BR2198 or BR2199. On page three of the yellow book you will find the code letter only while on BR2198 and 2199 you will find the description. Examples are given below.

- 1) Example of page two, yellow book, showing key to codes

CHANGE OF POST OFFICE OF PAYMENT

See P.O.R. C2X for full instructions re change of office procedure if required		COMPLETE SPACES BELOW IN P80 CASES ONLY		Key to code letters shown opposite (Retirement Pension and Widow's benefit only)
		New office of payment (not valid until (d) is stamped)	Date stamp of new office	
Payment without P80 (FIRST ORDER)	Payment without P80 (SECOND ORDER)	(c)	(d)	A = Basic Pension
(a)	(b)			B = Basic Pension Increments
Not to be encashed outside Great Britain unless authorised on the front cover by the issuing authority. Proof of identity is required for each order exceeding £50 when presented at other than the nominated Post Office. Not more than two orders may be cashed on any one day if the value of each exceeds £50.				C = Graduated Pension (including any increments)
				D = Age Addition
				E = Adult Dependency Increase
				F = Child Dependency Increase
				G = Invalidity Addition
				H = Attendance Allowance
				J = Additional Pension (before deduction of any Guaranteed Minimum Pension)
				K = Guaranteed Minimum Pension
				L = Additional Pension Payable (after deduction of any Guaranteed Minimum Pension)
				M = Additional Pension Increments
				N = Up-rating of Guaranteed Minimum Pension Increments
				P = Wife's Entitlement on Own Contributions
				Q = Earnings Reservation

- 2) Example of page three, yellow book, showing layout of benefit and component parts of benefit.

YOU MAY CUT OUT AND KEEP THIS PAGE BEFORE CASHING THE LAST ORDER DLO 22 MAY 86

RETIREMENT PENSION

15PEK

TOTAL £40.23

FROM

RP

PENSION BREAKDOWN

22 MAY

40.23 (Q45(b)(i))

A 38.30

J 2.92 (Q45(b)(iv))

C 0.51

L 1.42

Q 3.43

Issuing Authority - DEPARTMENT OF HEALTH AND SOCIAL SECURITY, C.P.B., NEWCASTLE UPON TYNE NE98 1YX

- 3) Example of form BR2198/9 showing layout of benefit and component parts.

Basic pension

Additional pension (J)

Adjustment for guaranteed minimum pension (K)

Additional pension payable

Increase for deferred retirement

Basic pension increments

Additional pension increments (M)

Uprating of guaranteed minimum pension increments (N)

Graduated pension

Invalidity addition

Age addition

Dependency increase

Attendance allowance

Total

Job release allowance should not be treated as N.I. Retirement pension and should be entered at Q52(c).

There are three sickness benefits available:

- a) Statutory Sick Pay (SSP)
- b) N.I. Sickness Benefit
- c) Contributory Invalidity Pension

Statutory Sick Pay is paid through the employer. The benefit is paid for a maximum period of 28 weeks in a tax year.

N.I. Sickness Benefit is paid by the DHSS for a maximum period of 28 weeks.

Contributory Invalidity Pension is paid by the DHSS. The benefit is paid in the 29th week of sickness and there is no limit to the number of weeks it can be received.

Sick pay by employers

Q.48

This question must be asked of all answering Yes to Q47.

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.49

EXCLUDE COMMUNITY PROGRAMME (ACTION FOR COMMUNITY EMPLOYMENT IN NORTHERN IRELAND) FROM THIS QUESTION. THIS QUESTION ONLY 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. 50(b).

Unemployment benefit/currently received

Q. 50(b)

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.

Where an informant has had more than one spell of unemployment in the last 12 months make sure to record all weeks and not just the number covered by last spell of unemployment.

Supplementary benefit

Q. 50(d)

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 Q50(d) should include an amount for the bill paid direct with a note to this effect.

See note on page 64 regarding buff payment book.

Maternity benefits and pay (prompt card L)

Q. 51

NOTE CHANGE FOR 1987

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

Note the addition of Statutory Maternity Pay from an employer.

Maternity pay from employer

Q. 51(c)

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. This will be gradually phased out in 1987 and replaced by Statutory Maternity Pay.

Statutory Maternity Pay

Q. 51(d)

This new benefit in 1987 is payable by employer, and will gradually replace Maternity pay from employer and in some cases replace Maternity Allowance.

The benefit is paid at two levels dependent upon hours worked and length of service.

Christmas bonus

Q. 52(b)

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.

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.60

Always give full details of benefit including government department concerned.

Pension from Employer, Trade Union, Friendly Society,
Annuity or Personal Pension or Covenant

Q.54

Pension from a previous employer relates not only to private pensions received by the informant from their own previous employer but also to a private pension from the employer of a deceased spouse or other relative.

This question is a filter for Qs 54(a)-(d). which appear on page 33.

Note that reference number should be entered at the top of page 33.

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

Do not include pension from a previous employer at Q54(b) or 54(d).

Q54(b) is concerned with personal pensions normally received by retired self-employed people.

Q54(d) deals with pension as member of trade union or friendly society.

Other deduction from an employee pension

Q.54(a)(i)

Normally income tax is deducted from an employee pension (Q 54(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 54(a). If the answer is 'No' ring code X.

Savings Accounts (prompt card 'N')

Q55

See Q71 for children under 16.

Holdings of Nat Sav. certs/SAYE/premium bonds, etc (prompts card 'O' & 'P') Q.56

See Q 72 for children under 16.

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 characteristics of holders of National savings investments.

Childrens holdings should be recorded at Q 72.

Bonds and securities (prompt card 'Q')

Q. 57

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

At Q. 57(a)(1) and 57(d)(1) 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 Q57(b)(1) and 57(e)(1) the amount should be before deduction of tax.

At Q57(f) 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. 58

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.59

Includes such income as;

1. Income as sleeping partner,
2. Income from owner of business who no longer takes an active part and has installed a manager,
3. Royalties from land as well as books, etc.

Regular allowances received (prompt card 'R')

Q. 60

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. Exclude allowance from spouse who is an absent spender or who is not a member of the household (see Q61).

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

SEE ALSO SECTION A8(b) (page 17).

Allowance received from or bills paid by an absent spouse
or spouse who is not a household member

Q.61

Details of any regular allowance paid by an absent spouse or a spouse who is not a household member to anyone present in the household should be recorded. For an absent spender this will be in addition to their proxy income details.

If the spouse who is present in the household draws money from a joint account the amount drawn should be recorded. Also record details of any bills paid direct by the absent spender or spouse who is not a household member.

SEE ALSO SECTION A8(b) (page 17).

Coal or coke from employer

Q. 62

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

Where an allowance is received in place of free fuel there is no need to record it. Income from the sale of coal or coke need not be recorded.

Concessionary bus passes/tokens/tickets

Q. 63

Exclude weekly or season tickets mentioned in household schedule.

Data collected for Q.118 household schedule can, if necessary, be used to prompt this question. If the area does not have concessionary bus pass travel, then code 3.

NOTE CHANGE FOR 1987

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) and code 2 at Q1(a) if this is their main occupation.

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

Tax paid direct to Inland Revenue

Q. 65

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. 57(a) and (d).

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

Income tax refunded direct by Inland Revenue or DHSS

Q. 66

Note that 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.67

NOTE FILTER BASED ON AGE AND EMPLOYMENT STATUS

Q.67 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.68.

Payment of NI contribution direct to Inland Revenue

Q. 68

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. 68.

Voluntary contributions when they are paid regularly (ie not a lump sum), should be entered at Q. 67 and not at this question.

Money sent abroad

Q. 69

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.70

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

Children's income - children under 16. (Prompt cards 'S' and 'T') Qs.71 & 72

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

Q71. Include any regular income, however small, eg from newspaper round, building society. Note that if there is more than one source of income then details of second income should be recorded in margin.

Do not include Child Benefit (enter at Q45a). Do not include cash gifts or pocket money.

Q72. Record answers in the same way as at Q56.

These questions are new for 1987 and are at the request of the DHSS who are trying to estimate eligibility for certain benefits.

The questions should be asked of all spenders and for children under 16. DO NOT INTERVIEW CHILDREN UNDER 16.

Husbands and wives should be treated as one unit and their total values of assets should be put in the same column. If there is a second married couple in the household then remember to treat them as one unit and use one column putting both their person numbers at the top of the column.

The asset questions Qs74-82 will not be asked of all FES Households. Only those households in which a married couple or other individual whose estimated total assets are within the range of £1,000-£10,000 will be eligible to be asked Qs74-82. We estimate that only one in four households will fall in this range. Where a married couple or individual has assets of less than £1,000 or more than £10,000 they will have been filtered out at Q73(b) or (c).

- 1) The first step (Q73(a)) is to prompt the liquid assets which are to be included in the definition. This is done by reference back to the following items on the household and income schedules.

Household schedule	Page 45	Q96)	
Income schedule	" 36	Q55(a)-(c))	
" "	" 37	Q55(d)-(f))	
" "	" 38	Q56(a)-(c))	Spenders only
" "	" 39	Q56(d)-(g))	
" "	" 40	Q57(a)-(c))	
" "	" 41	Q57(d)-(f))	
" "	" 51	Q71)	
" "	" 52	Q72(a)-(c))	Children under 16
" "	" 53	Q72(d)-(g))	

Two large asterisks have been printed at the top and bottom of each of these pages to enable you to refer back more easily.

- 2) The next step is to ask Qs74-82 which are opinion questions about the total value of the assets (or holdings). It is not necessary for the informant to search out records; however do not discourage them.

Accounts and investments held

Q73(a)

Tick the type of account or investment held.

Note that for children under 16 you will need to check at Q71 (page 51) for any mention of investment income and at Q72 (pages 52 and 53) for any National Savings holdings. We do not know if children have bank or giro accounts.

Level of Assets held

Q73(b)&(c)

This is a filter question asked of husband and wife together or of individual spenders or father or mother about a child under 16. (Do not interview children under 16).

If the value of assets is more than £1,000 and less than £10,000 then Qs74-83 are asked as relevant. IT IS IMPORTANT TO STRESS THAT ASSETS ARE RESTRICTED TO THE ACCOUNTS SPECIFIED AT Q73(a). DO NOT INCLUDE ANY OTHER ASSETS SUCH AS VALUE OF HOUSE.

Amount in bank/giro account (exclude savings accounts)

Q74

Check back to Q73(a) to see if bank/giro account held. If no ask Q74. Ideally one wants to obtain the amount in the current account at time of interview; however this may prove impractical. Beginning of month balances will be sufficient.

Amount in Savings Accounts

Q75

This question covers investments in:

National Savings Bank, Trustee Savings Bank, Building Society Deposit or Savings Accounts in banks. Current balances required as accurately as possible. Check back to Q73(a) to see if any savings are held in these.

Value of National Savings Certificates

Q76

Check back to Q73(a) to see if index linked or fixed interest certificates held, if they are then ask Q76. It is important to note exactly which issues are held, how many certificates are held, when they were acquired and finally and finally note their approximate total value.

NB. National Savings Certificates have an issue number eg '23rd issue' this is required under 'Issue Details'.

Value of National Savings SAYE

Q77

Check back to Q73(a) to see if held.

If held obtain issue details, date savings started, amount of regular payment, period covered by payment and an estimate of amount saved to date.

Value of Premium Bonds

Q79

Check back to Q73(a) to see if held.

It is not necessary to specify each bond held - only the total amount.

Value of National Savings Income and Deposit Bonds

Q80 & 81

Check back to Q73(a) to see if held.

Record number and value of bonds.

Other type of securities

Q82

IT IS IMPORTANT TO FULLY DESCRIBE SECURITIES HELD, THE NUMBER OF SHARE CERTIFICATES, THE EXACT NAME OF THE SECURITY AS WELL AS AN ESTIMATE OF THE TOTAL VALUE HELD.

Check back to Q73(a) to see if any of the following held:

Government gilt edged stock

Unit trusts

Stocks, shares, bonds, debentures and local authority securities

Other securities

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From 1987 these are the following changes to the diary.

1. The two separate weekly diaries and the single credit card account sheet have been combined into a single document covering two weeks.
2. For food, soft drinks and alcoholic drink brought home (left hand pages) the name of the store or shop where bought is required.

Order of diary contents

D1

Front page : containing boxes for reference number, date of next call and recording credit card information

Pages 2 and 3 : containing explanatory notes

Pages 4 and 5 : containing example pages

Pages 6 and 7 : first credit card pages

Pages 8 to 21 : first week record keeping

Page 22 : blank

Page 23 : leading page for second week

Page 24 and 25 : second credit card pages

Pages 26 to 39 : second week record keeping

Page 40 : refunds and winnings

Page 41 : reference list of items

Page 42 : informants notes

The order of diary headings

D2

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 EVEN IF ALREADY RECORDED IN HOUSEHOLD SCHEDULE (EG ELECTRICITY BILL).

Each diary 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 diary 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 diary. 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 diary. If you have to make entries in such cases, explain how this happened on page 42 of the diary and if you can, attach the individual's own notes. In 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 42. Alternatively, you may enter the expenditure for the spender in question, but this will necessitate calling several days a week.

Points to remember when leaving diaries

D.3

Before leaving a diary with a spender you should:-

- a. Fill in the area, serial, household and person number. For serial numbers and person numbers, remember the leading zero
- b. Head each of the fourteen double pages with the date in full and ring day of the week. The year is not required as this is on the front of the diary.
- c. Enter the starting date of record keeping on page 1 of the 'A' schedule.
- d. Enter a day, date and time for the next call on front cover. (You will still make an interview checking call between 3rd and 5th day).
- e. Ring Y if credit card held or ring X if no credit card.

General Points

D. 4

It is not necessary to explain all of the points mentioned below when leaving the diaries. 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. You should not accept itemised till receipts. Items on these should be entered into the diary by the informant. If they absolutely refuse to do it then you should copy details in. Any budget returned to H.Q. without this being done will be returned to you as we do not have the facilities for copying. Itemised receipts are usually very clear but regrettably we cannot use them as each item has to have an individual code number added to it for processing purposes. It is for this reason that each item has to have its own line in the diary.
- c. All amounts of money spent during the two weeks must be entered, including money spent on those items already entered on the household schedule.
- d. 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 credit card, charge card or grocery account is involved (see below D5).
- e. 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.
- f. See section D14 for shopkeepers and farmers and section D15 for holidays.
- g. 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.
- h. The notes on pages 2 and 3 of diary which form part of these instructions should be brought to the informants attention.
- i. All acquisitions by 'credit-card' or 'charge-card' should be recorded in in diary on the day the goods were acquired. The words 'credit-card' or 'charge-card' should be written beside entry.

Food and drink brought home - (except take away meals, meals, out etc) D.5

NOTE CHANGES FOR 1987

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

When you probe an item which does not require a change as a result of the probing would you please note this or we will assume that entry was not probed, eg Milk bill - if you do not add 'milk only' after probing we will assume that entry was not probed and that the milk bill could include amounts for items other than milk.

- a. For meat, fish, fruit and vegetables we need:
 - 1. Type - eg pork, beef, cod, apples, peas.
 - 11. 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
- f. Soft drinks: Note whether squash or fruit juice.
- g. Grocery accounts: On the regular commitments sheet, you should check whether the account will be paid within the record-keeping period.

If will not be paid: no information is required.

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

- i. If can itemise: on the day the bill is paid list each item purchased on the account on a separate line. (NB you may, in some cases, have a whole month's groceries listed).
- ii. If cannot itemise: 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".

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.

- h. Purchase of food, soft drinks and alcoholic drinks by credit-card or charge card - see D4(i) above.
- i. Commencing in 1987 it is important to brief informants to enter the name of the shop where food, soft drinks and alcoholic drinks brought home were purchased.

This is to improve the Retail Price Index. The main emphasis is on the very large multiple retailers - therefore it is not necessary to know the exact name of a small independent corner shop, e.g. 'corner shop' will be sufficient in such cases.

Take away meals brought home

D6

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 4(e).

Take away meals purchased on credit card or charge card - see D4(i) above.

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 take away meals brought home see section D6.

- 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. The words 'with meal' should be 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 'Beers, wines ... etc' (See section D8).

- 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.

NB For meals, snacks etc bought by credit card or charge card see D4(i).

Beers, wines, spirits and other alcoholic drinks bought and consumed away from home D8

Alcoholic drinks taken with meals should be entered here. (See D7).

Itemise separately beer, wine, vermouth, sherry, port, tonic wine, madeira, etc (See D5 and D7 for soft drinks).

If a number of drinks were bought and there was a mix of wines, beers, spirits etc which the informant cannot itemise then obtain an estimate of how much spent on each.

NB Alcoholic drinks bought by credit card or charge card - see D4(i).

Cigarettes and tobacco, newspapers magazines, books, postage D9

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 - Football pools - posted 11th January 75p
Poundage 21p

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

EXAMPLE

Postal order - not used - 75p
Poundage 21p

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.

NB Items purchased by credit card or charge card - see D4(i).

Fuel and light, household goods, cleaning materials, furniture D10

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'.

NB Items purchased by credit card or charge card - see D4(i).

Travel by rail, bus, air, taxi - motor vehicles, cycles, etc D11

a. Expenditure

State whether by bus, rail, tube etc. Season tickets: state mode(s) of transport involved,

Check whether this is the first season ticket. If it is, write "first ticket" beside entry, if not check back to Q77 Household Schedule to see if there is or should be an entry there.

Bus and train fares should be probed to check whether school fares. If they are, write "school fares" beside them and check Q102 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 40 of diary, question 112 on household schedule and questions 17, 18, 19, 20, 27, 37 and 44 on income schedule.

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

NB Items purchased by credit card or charge card - see D4(i).

Clothing, clothing materials and footwear D12

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.

NB Items purchased by credit card or charge card - see D4(i).

Lessons, gifts, play schools, deposits, instalments and D13
credit payments, etc.

a. Lessons

If payments are recorded for lessons, eg driving, keep fit, aerobics, music, check whether this is FIRST lesson; if not ask Q.104B(b) on household schedule. If it is first lesson, write 'first lesson' against entry.

b. 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 Q104A or 104B on household schedule. If it is first payment, write 'first payment' beside entry.

If expenditure is for playgroup, note this fact.

c. Gifts and presents

- i. If gift/present is not cash specify the item purchased.
- ii. If gift/present is cash to another household member write 'cash' beside entry and note person number of person the money is given to, eg 'cash to P2'.
- iii. If gift/present is cash to someone outside the household write cash beside entry and note 'to someone outside household'.
- iv. Pocket money. Note the person number of the child the money was given to. There is no need to find out what the child spent the money on.

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. Christmas and savings clubs

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

g. 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.

Specify type of improvement in full eg additional garage, built-in bedroom furniture.

h. 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.

Specify type of expenditure in full (see 'g' above).

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 (see D15-17).

n. Business trips - see D18

o. Money given to children for school meals/school travel. There is no need to probe to find out if in fact the money was spent on school meals or travel to school.

NB Purchases by credit card or charge card - see D4(i).

Shopkeepers, farmers etc

D14

Shopkeepers, Farmers etc

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

- a. Where the informant actually puts money in till for the goods, the amount should be recorded.
- b. 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.

Holidays starting and ending during record keeping

D15

The treatment of expenditure while on holiday depends whether the holiday is in the UK (England, Scotland, Wales and Northern Ireland) or abroad.

a. Holiday in UK

Informants should be asked to maintain diaries as if they were at home ie record all expenditure individually. Diaries will be collected by you at final call.

b. Holidays outside UK (including Channel Islands and Eire)

Informants should be asked to record daily totals spent together with name of county in which holiday was taken. Diaries will be collected by you at final call.

Holiday expenditure by credit card - see D4(i)

Holidays starting during record keeping but ending after record keeping period finishes

D16

Treatment of expenditure while on holiday and method of returning diaries to you depends on whether the holiday is in the UK (England, Scotland, Wales or Northern Ireland) or abroad.

a. Holidays in UK

Informants should be asked to maintain diaries as if they were at home ie record all expenditure individually. Diaries should be posted back to you in envelopes provided (see also section A7 (page 16))

b. Holidays outside UK (including Channel Islands and Eire)

Informants should record on page 42 of diary the following information.

1. Number of days they will be outside the UK
2. The amount of travellers cheques and currency they will take outside UK
3. The estimated value of any ordinary bank, cheques they will write outside the UK;
4. The country in which the holiday will be spent.

This information allows us to proportion the amount of total expenditure abroad between that within the record keeping period and that outside the record keeping period.

The diaries should be collected on day before holiday or be posted to you on that day.

Holiday expenditure by credit card - see D4(i)

Holidays due to start after record keeping period

D17

All expenditure in preparation for holiday eg deposit, final payment or purchase of travellers cheques or foreign currency should be recorded if they occur during the 14 days.

Bank charges for travellers cheques or foreign currency should be itemised separately from the cheques or currency.

If the holiday is to be taken in England, Scotland, Wales or Northern Ireland, write 'UK' beside entry. If it is to be taken outside the UK note country in which holiday will be spent.

NB Channel Islands and Eire are NOT in UK.

Holiday expenditure by credit card - see D4(i)

Business tripsD18

Where a member of the household takes a business trip then the action to be taken is the same as for holidays (see D15-17). A careful check should be made for refunds.

Monthly accountsD19

Where an informant has an informal arrangement with a shop, action (as described under D.5(g) for grocery accounts) should be taken.

Page 40 - refunds and bettingD20

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. 112 household schedule and 17, 18, 19, 20, 27, 37 and 44 income schedule should be checked to see if refunds would have been expected on expenditure in Record Book.

a. Refunds

If there is no entry in this box, probe to check whether any items of expenditure shown in diaries are refundable. This is especially important if there are items mentioned at 17, 18, 19, 20, 27, 37 and 44 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.

Credit cards - accounts paid (see Q85 'A' schedule for chargecards)D21

NOTE CHANGE IN 1987

The credit card sheets are now in the diary you will know if the informant has a credit card from the answer to Q78 household schedule. You will need to brief him or her to record all credit card acquisitions in the diary (see also D4(1)). You will also need to brief him/her to keep a record of any accounts paid during the 14 days.

If a credit card account is paid in the record keeping period, the informant should record on the credit card pages (pages 6/7 and 24/25).

- (a) Name of credit card company
- (b) Amount of payment made. This may be the minimum payment asked for or larger
- (c) Date payment made
- (d) Interest charge on the account paid

- (e) A description of items acquired during the period of the account. (The account shows the shop or store where items are acquired and this should act as a prompt for the actual item acquired. Full details of items acquired are wanted as in any other part of the diary)
- (f) If expenditure is to be refunded by an employer or claimed for refund from an employer this must be included.

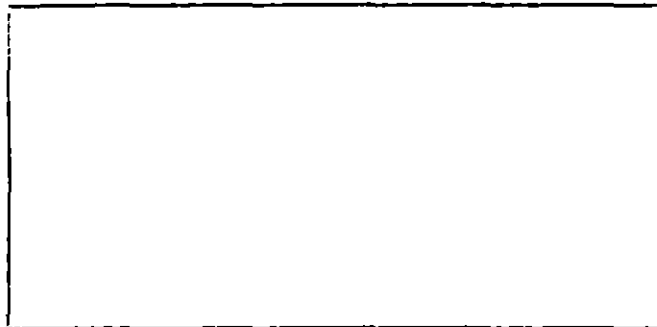
The following examples of credit card accounts show the data required to be carried onto the credit card pages. The letters (a)-(e) refer to the list above.

EXAMPLES

1. BARCLAYCARD (a)

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

) (e)
)



PRESENT BALANCE £12.25
CREDIT LIMIT £600

MINIMUM PAYMENT £5.00
TO REACH US BY 11 NOV 87

(b)
(c)

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

2. ACCESS (a)

Date	Reference number	Description	Previous Balance
			389.01
12 08 87	J4645X	MUSIC DISCOUNT CENTRE, LONDON W1	4.50
02 09 87	K47DM0	WORDS AND MUSIC, LONDON SW15	17.90
03 09 87	K76M03	MUSIC DISCOUNT CENTRE, LONDON W1	4.50
04 09 87	LBXSSY	PAYMENT - THANK YOU	100.00 -
05 09 87	LLDIHT	B R WATERLOO, LONDON SE1	11.15
		INTEREST	8.64
			New Balance
			335.70
			Minimum Payment
			16.79

)
)
) (e)
)
(e)
(d)

MINIMUM PAYMENT TO REACH US BY 16.10.87
(c)

(b)

For 1987 the checking schedule has been extensively revised in an effort to make it easier to complete and ideas from interviewers who tested it have been incorporated. Over the years the K schedule has proved itself by reducing postal and interviewer referrals by 60%.

Pages 1, 2, 4, 5 and 6 must be completed by ALL interviewers

Page 3 is for optional use by those interviewers who find it helpful.

Pages 7, 8 and 9 must be completed by interviewers working on their first four quotas. Experienced FES interviewers can use them if they find them helpful.

INITIAL INTERVIEW: REGULAR COMMITMENT QUESTIONS

The questions on page 1 should be asked while introducing the diaries. 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.

The last column at Q2 (Day usually paid) is optional ie for you to use if you feel it will speed up your checking call.

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

Page 2

Page 2 covers checks on loans, period codes and gross wage.

Enter pay details from Qs11-16 'B' schedule, add these up and enter total at bottom of column. If this is different to the gross pay given by the informant (where gross pay given) check reason for difference at checking call and note the answer on checking schedule.

Page 3 of the checking schedule (completion of which is optional) relates to regular weekly, two weekly, or monthly paid commitments, 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.

FIRST CHECKING CALL AND FINAL CALL: DIARY ENTRIES

Note that for 1987 this includes slot meter payments check.

At the first checking call and final call, check diary entries for points raised on pages 75-83 of these instructions and those on pages 4 & 5 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 1 (and 3 if used).

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 (X). 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 6 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 and ask to which address we should send the postal order. The details of new address should be recorded at foot of pink and yellow pages of 'E' form.
- 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 two checks regarding record books, and Local Authority rent shown on page 6 of the checking schedule.

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

GENERAL CHECKS

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

- | | |
|--------------------|--|
| Household Schedule | Did any peculiar or unusual circumstances exist? If so, add notes regarding them at Q119 on the schedule. |
| Income Schedule | Has information on income and occupation been provided for every member of the household who is 16 years or over? <u>THIS IS IMPERATIVE</u> . Has income for under 16 year olds been recorded at Q71 and 72? |

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.

Pages 7-9 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.

RETURN OF
WORK AND
ADMINISTRATION

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

Form H - Weekly Progress Return

8.2

NOTE CHANGES FOR 1987

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.
6. Remember to enter Authorisation Number and Area Number.
7. Check serial numbers carefully.
8. Addresses where household are local authority tenants in receipt of 100% Housing Benefit must be identified (see Q17 'A' schedule).

Form E - record of spenders in cooperating households only

8.3

NB The 1987 'E' forms have been redesigned and include a box for you to write in the full name of the local authority covering the address at which interview took place. It is essential that you write in this name because PAB use it to allocate a three digit local authority code which in turn is used by the computer to allocate rates poundage data.

1. From the appropriate pad, detach one 'E' form comprising of a covering letter, a yellow form and a pink form. 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.

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 should print 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

HOH MR R. SERVICE

Postal Address 1, JAMES ROAD

OAKLEY

STAFFS

Postal Code OY1 5RR

OUR REF		
123	02	-

Dear Sir (Madam)

FAMILY EXPENDITURE SURVEY

I am writing to say how much we appreciate the help you have given in connection with the Family Expenditure Survey. The information you have given about your expenditure and other details will be of great value; you may rest assured that all this information will be treated as strictly confidential.

In recognition of the time and trouble you have taken in supplying the information required, the Social Survey is authorised to send you the sum of £5.00. A postal order for this amount is accordingly enclosed.

Yours faithfully

R U Redpath
Principal Social Survey Officer

E1

E1/S837

W2472

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.
- g. Name of local authority covering the address of which interview took place

Please note the following points.

- A. Number 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. Number 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 may 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.

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. Continued on next page.

C. Starting date of records

Enter here the starting date of the records. These dates should agree with those shown on household schedule.

FAMILY EXPENDITURE SURVEY

COOPERATING HOUSEHOLDS

TWO COPIES

HOH MR R SERVICE, Area LICHFIELD
 Postal Address 1, JAMES ROAD
OAKLEY
STAFFS
 Postal Code OY1 5RR

Area	Ser.	Hid
123	02	-

Ref. No. 123 02 -
 No. of households selected at address 1
 No. of E forms from household 1

Starting date of records 1st JAN 1987
 Interviewer's signature S. Proed. Auth No 789D

Record Full Name of Local Authority	<u>LICHFIELD DISTRICT COUNCIL</u>
Area in which household resides	<u>LICHFIELD DISTRICT COUNCIL</u>

NAME PERSON TO WHOM PAYMENT IS TO BE MADE (ie SPENDER)		PERSONS IN HOUSEHOLD		All inc. children	Amount to be paid
Personal number	Surname (ie. DOCK CAPITALS)	Initials	Mr/Mrs/Miss		
<u>01</u>	<u>SERVICE</u>	<u>R</u>	<u>MR</u>	<u>1</u>	<u>£5.00</u>

Certified correct

F.1/S837

AD407

- 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 60 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. Explain that we cannot send out blank postal orders so we will be unable to send them £5.00. If they do not wish to be paid the £5.00 for taking part in the survey this is acceptable and we can still use the interview data.

It is not possible for postal orders to be made out by OPCS to charities. Government auditors would question any department that appeared to be sending public money to a charity. It is possible to send the postal orders to the informants to pass to the charity but the postal orders must be made out to the informants; it is not possible to send out blank postal orders.

NOTE CHANGE FOR 1987

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).

Note that addresses with households who are local authority tenants in receipt of 100% Housing Benefit and the return of Housing Benefit form HB/1 must be indicated.

Calls and Outcome sheets (L)

8.5

NOTE CAREFULLY THE CHANGES FOR 1987

1. One to be returned for every household/serial number
2. Any placing interviewing done: ring code 90 for full or partial interviews, i.e. where spenders are seen at different times, or where the interview becomes a refusal part way through.
3. Ineligible: code 1 - several of the dependent codes have been merged this year.
4. Refusal to HQ letter: code X is a new code to be used only when we tell you that an informant has been in touch with HQ and refused at the letter stage.

Code X refusals will not be counted in the interviewers effective quota so will not affect personal response.

The new code is only for refusals made direct to HQ as a result of our letter and before you have called on the address. There will not be anything to record in the "Call No." section of the form, but we still want you to account for every serial number issued to you by returning Calls and Outcome sheet plus 'H' and 'J' forms.

5. No household at address: code 3(i) "not yet built" has been added to help identify PAF problems with non-existent addresses.

code 3(j) is for all other addresses that cannot be traced. A full note of all action taken to find the address must be given on the back of the Calls and Outcome sheet.
6. Refusals. Code 7: also ring (a) or (b) this will help us ascertain at what stage the refusal occurred. Analysis will be carried out by the Research Unit so please return partially completed documents for refusals 7(b). Note who refused and at what question the refusal happened.

Detailed below are the documents required, in order, for the different types of response.

a. Fully co-operating household

1. Calls and outcome sheet (L)
2. E forms - 3 copies, pinned to A schedule
3. Household schedule 'A'
4. Checking schedule 'K'
5. Income schedule 'B' for persons 1-3
6. Diary and continuation pages in that order.

b. Refusal, non-contacts - ineligible

1. Calls and outcome sheet (L)

(Partial refusals - as refusals, and all other documents completed wholly or partially for or by the household).

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 field officer for instructions.

DELAY IN RETURNING COMPLETED BUDGETS CAUSES DELAY IN PAYMENT TO INFORMANTS.

Study time

8.7

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.

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 (or since last re-briefing) - 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 (or since last re-briefing) - 2 HOUR'S STUDY TIME.
- c. To interviewers not eligible at 1 or 2 for study of amended documents and new instructions each year:- 2 HOUR'S STUDY TIME prior to starting their first FES quota that year.

For checking each fully cooperating household - 1¹/₂ hours.

For checking schedules for a household that promised cooperation, but later failed to cooperate - 45 minutes.

For checking a household that promised co-operation but had to be reallocated to another interviewer for final calls - 1 hour.

For checking reallocated households where initial interview was done by another interviewer - 1hour.

(ie both placing interviewer and pickup interviewer can claim one hour).

You should claim these on normal claims form.

Working away from home on subsistence

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.

Contact with HQ during field work period

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.

Training before the briefing

Although your main training on the FES comes at the initial briefing we also expect you to do some preliminary work on your own before the briefing. In advance of your first briefing on the FES you will be sent a training tape. IT IS ESSENTIAL THAT YOU WORK THROUGH THE TAPE PRIOR TO THE BRIEFING.

It may also help to do a dummy interview with a friend or relative for practice.

Before coming to the briefing write out an introduction or at least a list of points you would include and bring it to the briefing for discussion and practice.

The briefing will include practical sessions on interviewing, introducing the survey, response, background and uses of the survey.

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. A follow up observation is usually made on the 3rd full quota. Please telephone the field officer if you are allocated your 3rd quota very late or have not been contacted by a field trainer so that necessary arrangements can be made. 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.

Check which rates office you have to visit to collect the rateable values for the allocated area.

HEADQUARTERS

Contact as follows:-

Your regional office - for any matters related to availability or non-availability and acceptance of quota and briefing dates, issues related to work progress, extensions to field period for late contact on quota, weekend work.

Field officer for the survey - for advice on matters of definition or procedure for this survey, together with queries on general interviewing methods.

Refusals

If you get 2 refusals in one week or other problems with response please ring in to talk matters over with the field officer. Sometimes we can offer useful advice or support and it helps us keep in touch with specific response problems.

June Langham Ext 2306
Sally Nicol Ext 2432

These are also the numbers to ring re: changes to placing pattern and queries on schedules, instructions, interviews and anything of a technical nature.

A 00332, 02

B 27 STOATLY RISE
SALISBURY
SP2 4AG

SALISBURY

/WD 08

/GR45100/20750

EXAMPLE OF NOTEBOOK RECORD

Double page per address

(H) Names and initials

(I) (Checked) Postal address

(C) Description -

(D) Gross Rateable Value -

(E) Nett Rateable Value -

(F) Local Authority Name - Salisbury District Council

(G) Concessionary Travel -

NOTE TO INTERVIEWERS.

Enter (A)-(G) for each address before you join your field trainer. The data can then be entered quickly as you collect it at the rates office.

NOTE TO INTERVIEWERS.

Enter (H)&(I) at final call. It is up to you whether or not you write in the two headings as a reminder.

102

	PAGES 103-111
<u>SPECIMEN HOUSING BENEFIT FORM</u>	
<u>COPY OF ADVANCE LETTER</u>	
<u>HOUSING BENEFIT CIRCULAR & EXTRACT</u>	
<u>METHOD OF BENEFIT</u>	
<u>PAYMENT</u>	
<u>GLOSSARY</u>	

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Office of Population Censuses and Surveys

Social Survey Division

St Catherines House 10 Kingsway London WC2B 6JP

Telephone 01 242 0262 ext

Our reference FES

Your reference

Date August 1986

Dear Resident(s)

You may have read about the Family Expenditure Survey in the newspapers or heard about it on the radio or television. The survey is one of the most important and long established ones done by government and has been carried out continuously since 1957. Its main use is in drawing up the Index of Retail Prices which provides up to date information on the cost of living.

In the next few weeks one of our interviewers will call on you: because the survey is only useful if each adult in your household takes part she (or occasionally he) will ask for an opportunity to explain it in detail to all of you. The interviewer will call during the evening if you are not at home during the day and will be happy to come again if you happen to be busy when she first calls. The interviewer will show an official identification card.

Any information given to the interviewer will be treated in strict confidence and be used for statistical purposes only.

By co-operating in the survey you will be assisting the many government departments and other organisations which use the results. Most people who help us also find the survey an interesting one to take part in. We are very grateful to every who helps us and as a token of our appreciation a gift of £5 is sent to each of you provided that all members of your household are able to help.

Please feel free to ring me if there is anything you wish to know before the interviewer calls.

Yours sincerely

June Langham
Family Expenditure Survey
Field Branch

NOTE TO INTERVIEWERS: WORDING MAY CHANGE DURING 1987

To: The Chief Executive
The Director of Finance
The Director of Housing

HB(83)6

Metropolitan District Councils
Non-Metropolitan District Councils
London Borough Councils
Scottish Regional and Islands and District Councils
Common Council of the City of London
Council of the Isles of Scilly

Director General and Clerk to the Council
Comptroller of Financial Services
Controller of Housing
The Greater London Council

General Manager
Chief Finance Officer
Development Corporations and Commission for the New Towns

Secretary
Scottish Special Housing Association
Development Board for Rural Wales

Dear Sir

HOUSING BENEFIT. STATISTICS

I. Introduction

1. The Department needs a certain amount of statistical information for financial and policy planning purposes. Much of this is provided through the arrangements for estimating and claiming subsidy. This circular outlines the proposed arrangements for seeking some additional information. It is recognised that a number of authorities are still reassessing cases involved in the main start, but authorities are asked to begin making preparations so that the proposed returns can be made on time.

II. Certificated cases and claimants on housing benefit supplement (HBS)

2. The Department has a well-developed sampling frame for providing a wide variety of statistical information relating to people on supplementary benefit. This includes information about housing costs and household composition. In order to maintain the effectiveness of the information provided, DHSS will ask for information from authorities about the housing benefit provision for certificated cases who appear in the sample frame. The sample of cases will be selected in DHSS local offices at the start of each exercise. The size of the sample will vary, depending on the number of claimants, but an average sized authority can expect to receive 70-80 sample cases in each exercise.
3. DHSS local offices will list the cases on a special form (STATS 116), a copy of which is attached at Annex A, together with the instructions for completing the form. It has been agreed that separate forms will be issued from each DHSS local office for LA tenants, private tenants and owner-occupiers in the sample, and that cases should be listed alphabetically in address order. There is space in column 2 of the form for authorities to include their own reference number for the claimant if they wish.

4. Authorities are asked to insert in columns 5-11 of the form the appropriate entries for the week indicated at the top of the form. Completed forms should normally be returned within 2 weeks to the DHSS local office which issued the form so as to avoid delays. If authorities experience difficulty in providing the information within this timetable, and it is acknowledged that many authorities will have difficulty making full returns on the first exercise, they should apply the procedure set out at item 4 of the LA instructions on the form.
5. The exercise will take place twice a year, in May and December, starting in early May 1983. If authorities have any queries on this part of the circular, or on the form STATS 116, they should discuss them first with their local DHSS contact point and then, if necessary, with Mr D O Turner, DHSS Alexander Fleming House, Elephant and Castle, London SE1 6BY; Telephone: 01-407-5522, extension 7373.

III. Standard cases

6. Only one statistical return will be sought each year for standard cases. This will provide a breakdown of the total number of standard housing benefit recipients for whom they are claiming subsidy in the week including 30 September each year, or, if that week is not typical for some reason, the nearest typical week should be selected. The draft forms to be used, showing the information required, is at Annex B. Authorities should note that separate returns are requested for rent rebates, rent allowances and rate rebates.
7. The first exercise will take place for the week including 30 September 1983 (or the nearest typical week). Copies of the forms will be sent to authorities nearer the time and will show the address to which the form should be returned. If an authority has not received copies of the forms by 31 August 1983, or if they have any queries about this section of the circular, they should contact Mr R V Easey, DHSS Newcastle Upon Tyne Central Office, Newcastle Upon Tyne, NE98 1YZ; Telephone 0632-612341, extension 7373.

IV. Housing Benefit Reviews

8. To help Ministers monitor the new provisions for reviewing determinations under Part III of the Housing Benefits Regulations 1982 (see paragraphs 6.20 to 6.26 of circular HB(82)2) some information will be sought on the numbers and kinds of reviews and their outcome. This is outlined in the form at Annex C.
9. Authorities should provide the information in quarterly returns, beginning with the quarter ending on 30 June 1983. Authorities should duplicate and use the form at Annex C for these returns. Completed forms should be returned within 21 days of the end of the relevant quarter (ie by 21 July, 21 October, 21 January, 21 April) to Mr G J G Jackson, Room 466, New Court, Carey Street, London WC2A 2LS. Where an agent authority provides benefit and review decisions on behalf of another authority, any reviews should be included in the return from the agent.
10. Any enquiries about this section of the circular should be addressed to Mr G J G Jackson, or telephone 01-831 6111, extension 2646.

V. One-off surveys

11. It may be necessary from time to time to undertake one-off surveys, for example if there is major political interest in certain parts of the scheme, but these will be kept to the absolute minimum. A small sample survey will be made to monitor what happened to those claimants who ceased receiving supplementary benefit as a result of the housing benefit changes. Most of the work will be undertaken within DHSS local offices - eg selecting the sample (2% of the approximately 250,000 claimants affected) and providing information on those notified to DHSS as entitled to HBS (the majority of the sample). For the remaining cases, authorities will be asked to complete a form giving brief details of any claim received. An average sized authority should need to provide information on only 2-3 cases. The exercise will begin on 31 May, and authorities will be sent the necessary forms from the appropriate DHSS local offices, to which they should be returned. Any enquiries on this exercise, once it is in progress, should be made to the local DHSS contact point.
12. A number of authorities have asked for lists of those claimants who ceased receiving supplementary benefit on the introduction of housing benefit, to check that they subsequently claimed housing benefit. DHSS will be preparing such lists for all authorities at the same time as the exercise outlined in paragraph 11 is undertaken, but excluding those claimants who were subsequently notified to DHSS as qualifying for HBS. The lists will be drawn up by local authority area and show the former claimants' names and addresses. Authorities are asked to check whether those on the lists did claim housing benefit, and in the case of any who did not, to send them a suitable reminder.

VI. Family Expenditure Survey

13. The Office of Population Censuses and Surveys (OPCS) have had to amend their interviewing procedures for the Family Expenditure Survey (FES) to take account of housing benefit. OPCS are concerned that some LA tenants on supplementary benefit may not be able to provide a breakdown of housing benefit for rent and rates and (where appropriate) help for water charges. OPCS propose to take the following action to overcome this:
 - i. On arrival in an area, the OPCS interviewer will contact the local housing department(s) to request the name and telephone number of a contact point for enquiries;
 - ii. where a householder cannot provide information about rent and rates, the interviewer will approach the contact point for the information.

OPCS hope that this arrangement will provide quick results and minimise the authority's involvement.

Yours faithfully

ALAN HEALEY
26 April 1983

SB2
DHSS
New Court
Carey Street
LONDON

CHAPTER 27: STATISTICS

27.01 The Department needs a certain amount of statistical information for financial and policy planning purposes. Much of this is provided through the arrangements for estimating and claiming subsidy. This chapter outlines the arrangements for seeking some additional information.

27.02 - 27.04

Certificated cases and claimants on housing benefit supplement

27.05 The Department carries out regular sampling exercises to obtain a wide variety of statistical information relating to people on supplementary benefit. This includes information about housing costs and household composition. In order to obtain a full picture, DHSS asks for information from authorities about the housing benefit provision for cases which appear in the sample. The sample of cases is selected in DHSS local offices at the start of each exercise. The size of the sample will vary, depending on the number of claimants, but an average sized authority can expect to receive 70-80 sample cases in each exercise.

Procedure

27.06 DHSS local offices will list the sample cases on a special form (STATS 116), a copy of which is attached at Annex A. The instructions for completing the form are on the reverse. Separate forms will be issued from each DHSS local office for housing authority tenants, private tenants and owner-occupiers in the sample, and cases will be listed by alphabetical address order.

27.07 Authorities are asked to insert in columns 5-11 of the form the appropriate entries for the week indicated at the top of the form. There is space in column 2 of the form for authorities to include their own reference number for the claimant if they wish. Completed forms should, if possible, be returned within 2 weeks to the DHSS local office which issued the form so as to avoid delays. If authorities experience difficulty in providing the information within this timetable, they should apply the procedure set out at item 4 of the instructions on the form.

27.08 The exercise will take place twice a year, in May and December. If authorities have any queries on the completion of form STATS 116, they should discuss them first with their local DHSS contact point and then, if necessary, with Mr D Fewster, Room A2105, DHSS Central Office, Newcastle upon Tyne, NE98 1YX; Telephone: 091-279 7993.

27.09

Standard Cases

27.10 The Department asks authorities to provide a statistical return each year for standard cases. This provides a breakdown of the total number of standard housing benefit claims for which subsidy is claimed in a nominated week each autumn. If that week is not typical for some reason, the nearest typical week should be selected instead.

27.11 The draft forms, showing the information required, are at Annex B to this chapter. Copies will be sent to authorities in advance of each year's exercise and will show the address to which the forms should be returned. Authorities are requested to make separate returns for rent rebates, rent allowances and rate rebates.

27.12 If the forms have not been received by 31 August each year or if there are any queries about this exercise, authorities should contact Mr D Fewster, Room A2105, DHSS Central Office, Newcastle upon Tyne, NE98 1YX; Telephone 091-279 7993.

27.13 - 27.14

Reviews by officers and review boards

27.15 Authorities are asked to make quarterly returns providing information on the numbers and types of reviews and their outcome. The form in which the return should be made is set out at Annex C.

27.16 Returns should be made for each quarter ending 31 March, 30 June, 30 September and 31 December. Authorities should duplicate and use the form at Annex C for these returns. Completed forms should be returned within 21 days of the end of the relevant quarter (ie by 21 July, 21 October, 21 January, 21 April) to Mr D Hart, Room 471, New Court, Carey Street, London WC2A 2LS. Where an agent authority provides benefit and review decisions on behalf of another authority, any reviews should be included in the return from the agent.

27.17 Any enquiries about the information to be provided about reviews should be addressed to Mr D Hart, or Telephone 01-831 6111, Extension 2719.

27.18 - 27.19

Family Expenditure Survey

27.20 The Office of Population Censuses and Surveys (OPCS) ask for information about housing benefit when interviewing members of the public for the Family Expenditure Survey (FES). In some cases, housing authority tenants may not be able to provide a breakdown of housing benefit for rent and rates and (where appropriate) help with water charges. To avoid problems the following procedure will be followed:-

- a. on arrival in an area, the OPCS interviewer will contact the local housing department(s) to request the name and telephone number of a contact point for enquiries;
- b. where a householder cannot provide information about rent and rates, the interviewer will approach the contact point for the information.

It is intended that this arrangement should provide quick results and keep the authority's involvement to a minimum.

27.21 - 27.99

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	(yellow)
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	(yellow)
Maternity grant	Giro	
Mobility allowance	Payment book	(yellow)
Retirement pension including old persons pension	"	"
Severe Disablement Allowance	"	"
Sickness Benefit	Giro	
Supplementary allowance	Payment book	(buff)
Supplementary pension	Payment book	"
Training allowance (eg TOPS, YTS)	"	(yellow)
Unemployment benefit	Giro	
Widows allowance	Payment book	(yellow)
Widowed mothers allowance	"	"
Widows pension	"	"
Workmans compensation benefit	"	"

Points to note are:

1. General. All benefits may be paid on the odd occasion by giro, eg when starting benefit. Usually however a payment stated to be by book will be by this method.
2. Training allowances. Because of the diverse nature of these schemes, payment arrangements are made by local offices and can be giro or payment book.

GLOSSARY

- ACCIDENT INSURANCE -** This is a private insurance taken out by individuals to give them a lump sum payment or a weekly payment if they suffer from an accident.
- ADDITIONAL PENSION -** See Earnings related supplement.
- ANNUITY -** This is basically a form of providing a regular income. A lump sum of money is paid to an insurance company and, in return, the company pays out a regular income. There are three main types of annuity; level annuities, where the income remains the same each year; increasing annuities, where the income increases at an agreed rate and unit-linked annuities, where the income is linked to the value of a fund (eg property).
- ATTENDANCE ALLOWANCE -** This is a benefit for adults or children who are severely disabled mentally or physically and need attention. In order to qualify, the person has to satisfy certain residential and medical conditions. There are two rates of allowance: the higher rate for those who need attention day and night, and the lower rate for those who need attention only by day or night. The allowance is normally paid by order book and is usually in addition to other National Insurance (N.I.) benefits.
- BANK BUDGET ACCOUNT -** A budget account is a way of spreading the cost of household bills and other lump sum payments over the year. The bank normally has to agree to the precise estimate of the year's cost of all the bills to be included in the scheme. This total is divided by 12 and a standing order for this amount is made to the bank each month. The bills are usually paid with a special cheque book from the budget account. Interest charged on this type of account varies between banks.
- BANK CHARGES -** Bank charges are amounts paid to a bank (by deduction by the bank from the account) to cover the administration of its services, eg for processing cheques, stopping cheques, paying standing orders.
- BANK CURRENT ACCOUNT -** An account into which money is deposited, usually to meet the needs of everyday expenditure. A cheque book is supplied to write cheques for cash or goods. In many cases (although not in all), an individual does not receive interest on this type of account. Bank charges may be levied to cover the administration of the account. This is the type of account into which salary is paid and from which standing orders are paid.
- BANK DEPOSIT ACCOUNT -** An account into which people can deposit any amount of money and on which they can get interest. Money can be drawn out of such an account at reasonably short notice.

- BANK DIRECT DEBIT -** See direct debit.
- BANKERS CARD -** See cheque guarantee card.
- BANK LOAN -** A personal loan arranged directly through a bank. It may cover a number of articles or services or only part of an article or service, depending on the borrower's circumstances and government credit restrictions.
- BANK SAVINGS ACCOUNT -** This is similar to a bank deposit account but there is often a requirement for a minimum investment and there are restrictions on when the money can be drawn out. Consequently, the interest rate is higher than for deposit accounts. Some types of bank savings account are known as Capital Investment Accounts.
- BANK STANDING ORDER -** See standing order.
- BLIND PERSONS ALLOWANCE-** This is an additional benefit paid with supplementary benefit to registered blind people. It is received in addition to other concessions.
- BOARD BUDGETING SCHEME -** This type of scheme is operated by the Gas and Electricity Boards and by the Post Office. It works in much the same way as a bank budget account, by spreading the cost of the bills over the year with regular monthly payments. There is no interest or service charge payable with this scheme.
- 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. (See also chargecard).
- AT A SHOP OR STORE**
(SEE ALSO CHARGE CARD)
- 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.
- CHARGE CARD -** A card issued by a store for use in the store, examples are Marks and Spencer and Debenhams. The card holder has a pre-arranged credit limit and can obtain goods including food up to that limit. Each month the card-holder is sent an account statement showing goods purchased. The card-holder must pay off some of the credit later each month with a minimum of £5.00 or 5% of amount owing. The whole amount can be paid off if wanted: The Charge cards are gradually replacing budget and option accounts.
- (SEE ALSO BUDGET AND OPTION ACCOUNT)

- 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 & CHARGE CARDS) - Eg, Barclaycard, Access, American Express, Diners Club. Any one over 18 can apply for a credit card. A person issued with a card can purchase goods and services, on credit, from a variety of shops and organisations which accept the card. Any number of goods and services can be purchased, up to the individual's credit limit set by the credit card company. Each month a detailed statement is sent to the cardholder showing the cost of the goods and where they were purchased. If the whole of the account is paid off within a specified period, no interest is charged. The cardholder must always pay off a minimum proportion of the amount owing, usually £5 or 5%, whichever is the greater. Interest is charged on the remaining amount.
- The exceptions to this system are Diners Club and American Express, who do not have a credit limit. With American Express, the account must always be paid in full at the end of the account period.
- 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, <ul style="list-style-type: none"> i. Made up pay, eg the difference between NI Sickness Benefit etc, and normal earned pay or ii. half pay, ie half normal earned pay. <p>There are, of course, other arrangements depending on the individual employer or employee's situation.</p>
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 SUPPLEMENT	-	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.
- GOVERNMENT GILT EDGED STOCK** - This refers to stocks issued by the government and considered gilt edged because they are secure investments.
- 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 - Investing in local authority securities is a way of
SECURITIES 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.
- MAIL ORDER DIRECT - This refers to mail order services advertised by a company in a newspaper, magazine, eg Reader's Digest, Automobile Association or in a limited item catalogue. Anyone interested in the advertised goods contacts the company direct and receives the goods through the post. Regular instalments are then paid direct to the company. This is different to arrangements through a mail order agent.
- MATERNITY ALLOWANCE - Maternity allowance is a weekly benefit, paid by giro, usually for 18 weeks, starting 11 weeks before the baby is expected. This allowance is paid in addition to Maternity Grant if the mother was working and paying full NI contributions at some time during the fifteen months before the baby was born. The husband's contributions do not count.
- MATERNITY GRANT - This is a lump sum paid for each birth to help with the general expense of having a baby. It is payable in nearly all cases of confinement where either the mother's or the husband's NI contributions allow entitlement. It is paid by giro cheque to the mother. Generally to qualify for Maternity Grant, a mother to be will have to be present in Britain for at least 26 weeks out of 52 before confinement.

- MATERNITY PAY -** Under the Employment Protection Act a woman having a baby who normally works for her employer eight hours a week or more, and has worked continuously for at least the previous two years, is entitled to this pay from her employer, as long as she continues working up to the 11th week before the baby is due. Payment is in cash (paid weekly) for the first six weeks after the woman stopped work. Maternity pay is less than normal pay.
- MOBILITY ALLOWANCE -** Mobility Allowance is a benefit to help certain disabled people to meet their additional transport costs. It is paid by payment book every four weeks. Mobility Allowance should not be confused with MOTORBILITY which is an independent voluntary organisation for the purchase or hiring of vehicles at preferential rates.
- MORTGAGE -** A mortgage is a loan for the purchase of property. The loan can be taken out from various organisations eg building society, local authority, bank. The size of the loan is usually worked out on multiples of yearly salary (often 2-2¹/₂ times depending on the lender's policy). The borrower, in most cases, will have to provide a deposit for the property (say 10%). Mortgage arrangements vary in the amount of interest payable and the tax relief that can be claimed. Most mortgages are one of two types, either interest and principal or interest only where there is an endowment policy covering the principal. (See Option mortgage, 'Top Up' mortgage).
- MORTGAGE TAX ALLOWANCE (M.I.R.A.S) -** In April 1983 a new scheme was introduced whereby tax relief on interest can be given by the organisation granting the mortgage rather than Inland Revenue via PAYE tax coding, etc. The scheme is not universal and not all institutions have adopted it. Under the new scheme the amount of interest paid to the building society, etc, is reduced by the amount of tax relief due.
- NATIONAL INSURANCE CONTRIBUTIONS -** A NI contribution is a regular contribution by individuals to enable them to obtain various national insurance benefits. All employed and self employed persons (earning more than a specified minimum amount) are required to pay a NI contribution. Some non-employed persons may also do so. There are different classes of contribution depending upon employment status.
- Employees pay class 1 contributions which are deducted from their wage or salary. There are three levels; contracted into the state pension scheme, contracted out of the state pension scheme (if the employee is in a private pension scheme) and a reduced rate paid by married women who were paying into the scheme before April 1978. (The reduced rate entitles them to fewer benefits).
- Self employed pay class 2 contributions on a regular basis and class 4 on an annual basis depending upon profits.
- Non-employed persons may also pay voluntary contributions under class 3.

- NATIONAL SAVINGS BONDS There are two types - Income Bonds and Deposit Bonds. Income Bonds pay out a monthly income based on interest while Deposit Bonds accrue the interest until required.
- NATIONAL SAVINGS BANK - This was formerly the Post Office Savings Bank. There are two types of account; ordinary accounts and investment accounts. The investment account offers a higher rate of interest and longer withdrawal terms than the ordinary account. There are no cheque books for these accounts, for both types of account customers have a book in which all deposits and withdrawals are recorded. It is possible to transfer money from a National Savings Bank account to a National Post Office Giro account.
- NATIONAL SAVINGS CERTIFICATES - There are two types Index-linked which are described under that title and ordinary. Ordinary certificates have an issue number eg '28 issue'. They are normally for a period of 5 years.
- NI RETIREMENT PENSION - This is the basic state pension for retired people (ie men aged 65 and over, women aged 60 and over). The rate of this pension depends upon the record of NI contributions during working life. It is paid weekly by payment book.
- NI SICKNESS BENEFIT - This benefit is paid to people who are incapable of work due to sickness and have satisfied certain NI contribution 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.
- PACKAGED HOLIDAY - Where a trained agent arranges all travel, board and eating arrangements.
- 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 - Private sickness schemes can be run on a commercial basis
SCHEMES 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 CATERING HOLIDAY - Where all arrangements for eating are arranged by the holiday maker. Travel and accommodation may be arranged by agent or by holiday maker.
- 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 MATERNITY PAY - Starting in April 1987 this new benefit will gradually replace Maternity allowance and maternity pay from employer. The new Statutory Maternity Pay will be paid by employer. The amount paid will depend upon length of service, wages/salary and hours worked. It is paid for eighteen weeks.
- 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.

Family Expenditure Survey

S837A

Day Month
 Date of interview [][] [][] 8 7
 Starting date of records [][] [][] 8 7

INT DAT (4)
 0000 7
 START DAT (5)
 0000 8

Household Schedule

AREA NUMA (2A)
 0000 3
 SERNUMA (2B) Ref No
 0000 4
 YCARA (5B) Off Use
 0000 9

CI CASE NO (1) 0000 1
 Interviewer Use
 Area Ser Hid CHECK DG (18)
 HANUMA (3) 0
 P0005
 LA CODE A (5) 87
 P0006
1987

Ring	Person No	Relationship	Sex	Age now	Marital Status	Current Full Time Education										Benefit Unit			Spender (16 or over) Do not ring an exception	D records received			
						Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use	Off Use					
01	0	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1
02	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
03	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
04	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
05	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
06	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
07	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
08	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
09	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2
10	1	2	1	2	3	4	5	6	7	8	9	1	1	2	3	4	5	6	7	8	9	1	2

Person No (6) 0001

Relationship (7) 0002

Sex (8) 0003

Age now (9) 0004

Marital Status (10) 0005

Current Full Time Education (11) 0006

Benefit Unit (12) 0007

Spender (13) 0008

D records received (14) 0009

Spender (16 or over) (15) 0008

D records received (16) 0010

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

MASTER SCHEDULE 1987

PAGE A01

To all households (ask job or wife)

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

OTHOLIV(17A)
 Yes → [] 1 - Ask (a)
 No → [] 2 - Go to 12

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

NOHHATAD(18)
 001 → [] [] - 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

Room used partly for business to be priority coded i.e. no duplication

Individual prompt

	(a)	(b)	(c)	Off Use
	Q 12 or 13(a)	Q 13(b)	Q 13(c)	
	USED SOLELY BY HOUSEHOLD	ROOMS SHARED	ROOMS LET OR SUBLET	LINE NO
Rooms partly used for business →	NOPARB(22) 0013 A1	NOSHPARB(23) 0013 B1	NOSLPARB(24) 0013 C1	1
Rooms used only for business →	NOSOLB(23) 0013 A2	NOSHOLB(24) 0013 B2	NOSLSOLB(25) 0013 C2	2
Bedroom →	NOBED(19) 0013 A3	NOSHBED(29) 0013 B3	NOSLBED(29) 0013 C3	3
Kitchen →	NOKIT(20) 0013 A4	NOSHKIT(20) 0013 B4	NOSLKIT(40) 0013 C4	4
Scullery used for cooking →	NOSCU(21) 0013 A5	NOSHSCUL(31) 0013 B5	NOSLSCUL(41) 0013 C5	5
Dining/living room →	NOLIVR(21A) 0013 A6	NOSHLIVR(32) 0013 B6	NOSLLIVR(42) 0013 C6	6
Bathroom →	NOBATH(24) 0013 A7	NOSHBATH(25) 0013 B7	NOSLBATH(45) 0013 C7	7
Garage →	NOGAR(25) 0013 A8	NOSHGAR(26) 0013 B8	NOSLGAR(46) 0013 C8	8
Other rooms (specify below) →	NOOTR(26) 0013 A9	NOSHOTR(27) 0013 B9	NOSLOTR(47) 0013 C9	9

See 14

Interviewer Check

Do the informants occupy the whole of the rateable unit as per your description from rating lists?

INFALLRU (49) Yes →
Q014 No →

1
2

Go to 15
- Ask 14

(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 117)?

ROOM NOOL (60A) Yes →
Q014 1 No →

1
2

- Ask (a)
- Go to 15

(a) How many other rooms? _____

NOROOMNO (371)
Q014 A

--	--

- Ask 15

(Exclude any rooms entered at 12 or 13)

In all households (Ask hoh only)

15 How many years have you lived at this address?

LTRESYRS (606)
Q015 1 Years →

--	--

- Ask 16

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

LTRESMTH (60C)
Q015 2 Months (if less than one year)

--	--

- Ask 16

To all households (Ask hoh or wife)

	£	P	
16 Do you rent or do you own this accommodation? 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)	→	1	Go to (d)
from a housing association	→	2	
from someone else unfurnished	→	3	
or furnished?	→	4	
(b) Do you own your accommodation			
Running prompt with a mortgage or loan	→	5	Go to 24
or outright?	→	6	
Caravans, mobile homes and houseboats being purchased to be coded 6 and payments recorded at 79-85			
(c) Do you receive your accommodation rent free?	Yes →	7	Probe to make certain not codes 1-6 then ask (d)
	No →	8	
(d) Does anyone outside your household pay rent on this accommodation on your behalf? (Exclude rent rebate/rent allowance/housing benefit - see 17)	Yes →	1	- Ask (i)-(iii)
	No →	2	- Go to (e)
(i) How much rent did they pay last time?	→		
(ii) How long a period did this cover?	Enter Period code →		If code 9, specify period then ask (iii)
(iii) Does your employer pay this rent on your behalf?	Yes →	1	- Ask (e)
	No →	2	- Specify arrangement and rent paid below 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 →	1	See 17
	No →	2	

To all with rented accommodation (Ask hoh or wife) DNA Rent free →

E	P
N	

 - Go to 24

17 Are you receiving a 100% housing benefit (rent rebate or allowance) for your rent from your local authority or your local Dept of Health and Social Security office?
 RR100PC (67) Yes →

1
2

 - See (a) or (b)
 Q017 No →

2

 - Go to 18

(a) For all local authority tenants with 100% housing benefit, record reference number on Form HB1 and go to Q 23

DNA Non-council tenants →

N

 - Go to (b)

(i) Rent payable - _____

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

RR100LA (67A)
Q017 A0

--	--

(ii) Period covered

PERCO67A (67B)

Enter Q017 A1
Period code →

	OFF USE
--	------------

(iii) Rent includes

RR100R (67K)
Rates Yes →

Q017 A2 No →

1	
2	

RR100RAT (67L)

Q017 A3

--	--

RR100W (67M)
W Rates & S Rates Yes →

Q017 A4 No →

1	
2	

RR100WR (67N)

Q017 A5

--	--

RR100H (67O)
Heating Yes →

Q017 A6 No →

1	
2	

RR100HEA (67P)

Q017 A7

--	--

RR100T (67Q)
Other items (Specify) Yes →

Q017 A8 No →

1	
2	

RR100TH (67R)

Q017 A9

--	--

OFF
USE

(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?

RR100PR (67U)

Q017 B1

--	--

- Ask (ii)

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

INA168 (67I) DK

Q017 B2

1	
---	--

- Go to 23

(ii) How long does this cover?

PERCO67H (67J)

Enter Q017 B3

Period code →

--	--

If code 9, specify period

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 (70)
Q018

£	P
---	---

19 How long did this cover?

PERCOT70 (71)
Enter Q019
Period code

If code 9, specify period

20 Do you have a rent holiday?

RENTHDAY (71A)
Yes → 1
No → Q020 → 2

- Ask (a)
- Go to 21

(a) For how many weeks of the year?

RENTHL (72)
Q020A

- Ask 21

21 Did you receive any rent rebate/rent allowance/housing benefit in connection with your last rent payment?

RENTREB (73)
Yes → Q021 → 1
No → 2

- Ask (a)
- Go to 22

(a) How much was it?
[Exclude rates rebate - see 25]

RRAMT (74)
Q021 A1

DK RRAMT DK (74A)
Q021 A2 → 1

- Ask (b)
- Go to (c)

(b) How long did this cover?

PERCOT74 (75)
Enter Q021 B
Period code

If code 9, specify period

(c) Was the rent rebate/rent allowance/housing benefit deducted from your last rent payment? or returned direct to you in a lump sum, that is by cash cheque or giro?

RRRETMET (76)
Q021 C

1 - Ask (i)
2 - Go to 22

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

RENTBAR (77)
Q021 C1
Before → 1
After → 2

- Ask 22

22 Does the rent you mentioned include any services such as

Running Prompt lighting heating hot water TV licence cleaning lift gardener or any other services?

RENTINSV (77A)
Q022 1
Yes → 1
No → 2

- Ask 23

Specify below and enter amounts

Exclude gas/electricity budget/credit schemes which would appear at 51 and 61

Type of service	£	P
SERVINC 1 (78A) Q022 2		
SERVINC 2 (78B) Q022 3		
SERVINC 3 (78C) Q022 4		

- Ask 23

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

23 Does the rent include rates?

INA173 (79)
Q023

E	P
1	2

- 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?

RATES(80)
Q024

1	2
---	---

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

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

RATESPER(82)
Q024 A

--	--

- Ask (b)

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

RATESPAY(81)
Q024 B

--	--

- Ask 25

To all households (Ask hoh or wife)

25 Did you receive any rates rebate/housing benefit in connection with your last rates/rent payment?

INA140 (90)
Q025

1	2
---	---

- Ask (a)
- Go to 26

(a) Was this deducted from your last rates/rent payment?

DEDRFLP(91)
Q025 A1

1	2
---	---

- Ask (I)-(III)
- Go to 26

(I) How much was deducted? [Exclude rent rebate - see 21]

RRDEDAMT(92)
Q025 A2
DK
RRDDAMDK(92A)
Q025 A3

1	

- Go to (III)

(II) How long did this cover?

PERC92(93)
Q025 A4

--	--

If code 9, specify period

RRDDPEDK(93A)
DK Q025 A5

1

- Ask (III)

(III) Was the amount you paid last time in rates/rent, that is (See 18, 24(b)) before or after deduction of the rebate/housing benefit?

RATESBAR(94)
Q025 A6

1	2
---	---

- Ask 26

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

8

26 In the last 12 months, that is since have you had any rates rebate/housing benefit refunded direct to you, that is a lump sum in cash, cheque or Giro?

RATESLSR (95)

Q026 Yes →
No →

E	P
1	
2	

- Ask (a)
- See 27

(a) How much was refunded?

RALSAMT (96)

Q026 A

DKALSAMDK (96A)
Q026 A2

1	

- Ask (b)
- See 27

(b) How long did this cover?

PERC96 (97)

Enter Q026 B1
Period code

--	--

If code 9, specify period

RLSRPEDK (97A)

DK Q026 B2

1	
---	--

- Ask (c)

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

INA 127 (98)

Month

Q026 C

Year 19

- Ask (d)

Enter month and year as two-digit code

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

MTORREB (99)

Yes →
No →
Q026 D1

1	
2	

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

LASLSRAR (100)

Q026 D2

PERC100 (101)

Q026 D3

OFF USE	

To all with housing benefit (coded 1 at 17 or 1 at 21 or 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?

INA 155 (102)

Q027

Yes →
No →
DK →

1	
2	
3	

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

(a) How much was included?

HBSAMT (103)

Q027 A1

HBSAMTDK (103A)
Q027 A2

1	

- Ask (b)
- Go to 28

(b) How long did this cover?

PERC103 (104)

Enter Q027 B
Period code

--	--

If code 9, specify period

Ask 28

To all households (Ask hoh or wife)

28 Is your accommodation connected to the mains sewerage and/or mains water supply? **MAINSEW (83) Q028**

Yes to both	1	} Ask 29 - Go to 30
Sewerage only	2	
Water only	3	
No to both	4	

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

WASRATE (84) Q029

Yes	1	} Ask (a) & (b) Go to 30
No	2	

(a) How many times a year do you pay? **WRATEPER (86) Q029 A**
Enter no. of times

		} Ask (b)

(b) How much did you actually pay last time? **WRATEPAY (85) Q029 B**

		} Ask 30

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?

OTHPAY (104A) Q030 1
Yes to any
No to all

Yes to any	1	} Specify below and enter amounts - See 31
No to all	2	

Type of charge and amount	OTHPYAMI (104B) Q030 2	
Type of charge and amount	PERC104D (104G) Q030 3	How long did this cover? Enter period code
	OTHPYAM 2 (104E) Q030 4	
Type of charge and amount	PERC104E (104H) Q030 5	How long did this cover? Enter period code

		} If code 9, specify period
		} If code 9, specify period

See 31

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 79)

	£	p	
DNA Coded 1-4 at 16(a), 6 at 16(b), or 7 & 8 at 16(c)	N		- Go to 43
31 Did you get the mortgage or loan to purchase your accommodation from a INA 119 (117) Running prompt Q031	Building Society Local Authority Bank Insurance company Other source?	1 2 3 4 5	- Ask 32 - Specify below and ask 32
32 Did the last mortgage or loan payment you made cover Prompt If more than one mortgage for purchase of accommodation, record details of other mortgages in left-hand margin	MORTTYPE (118) interest only? Interest and capital/principal? Q032	1 2	- Ask 33-35 - Go to 36
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?	MORINPAY (119) Q033		- Ask 34
34 How long did this cover?	PERC119 (120) Enter Q034 Period code		If code 9, specify period
35 Is there an endowment policy covering the repayment of the capital/principal of the mortgage or loan?	Yes No MENPOL (121) Q035	1 2	- Ask (a)-(d) - Specify below how principal covered and go to 41
(a) How much was your last premium on the endowment policy?	MENPOLAM (122) Q035 A		- Ask (b)
(b) How long did this cover?	PERC122 (123) Enter Q035 B Period code		If code 9, specify period
(c) Has this insurance premium been included in the amount of interest you mentioned earlier (see 33)?	INCININT (124) Yes Q035 C No	1 2	- Ask (d)
(d) In what year was this insurance taken out?	MENSTYR (123A) Q035 D Enter year as two digit code 19		- Go to 41

11

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?

INTPRPAY (125)
Q036

E	P

- Ask 37

37 How long did this cover?

PERC125 (126)
Enter Q037
Period code

If code 9, specify period

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

INTL12M (127)
Q038 1

- Ask (a)

- Go to 39

INL12MDK (127A) DK
Q038 2

(a) What dates does this cover?

Enter month and year as two-digit code

Beginning Month
INA 158 (128)
Q038 A1

Year 19

- Ask 39

Ending Month
INA 159 (129)
Q038 A2

Year 19

39 For how many years have you had the mortgage/loan?

INA133 (129A)
Q039 1

- Ask 40

- Ask 40

MLTRUNDK (129B) DK
Q039 2

40 How many years does it still have to run?

INA 134 (129C)
Q040 1

- Ask 41

- Ask 41

MLTORNDK (129D) DK
Q040 2

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

41 Has standard tax relief on the mortgage already been deducted from the payment you just mentioned?

INA163 (130)
Q041

Yes
No
DK

£	P
1	
2	
3	

Ask 42

42 Did your last payment on the mortgage/loan include an amount for insurance on the structure and/or a mortgage protection policy?

MOTHAMIN (130A)
Q042

Yes to both
Insurance on structure only
Mortgage protection policy only
No to both

1
2
3
4

- Ask (a)-(e)

- Ask (a)-(b) and go to 43

- Go to (c)-(e)

- Go to 43

(a) How much was for insurance on the structure?

INSTANT (132)
Q042A

--	--

- Ask (b)

(b) How long did this cover?

PER132 (133)
Q042B

Enter period code

--

If code 9, specify period

N B This can be a different period to that covered by mortgage/loan payment

(c) How much was for a mortgage protection policy?

INCPAMT (135)
Q042C

--	--

- Ask (d)

(d) How long did this cover?

PER135 (136)
Q042D

Enter period code

--

If code 9, specify period

N B This can be a different period to that covered by mortgage/loan payment

(e) In which year was the mortgage protection policy taken out?

INCMSTYR (137)
Q042E

19

--	--

Ask 43

Enter year as two-digit code

To all households

Ask all spenders

43 Do (any of) you pay any (other) insurance premiums on the structure of this accommodation, its furniture and contents or on any personal possessions?

SCPPINS (138)

Q043 1 Yes →
No to all →

1
2

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

Include

jewellery, furs
cameras, boats
caravans (if not sampled address)
TV (excluding maintenance contracts)

Exclude

cars
maintenance contracts

RECORD 70

Use separate column for each insurance policy

SCPPP	NO(139)				
Q043	2				

Per No

SCPPITNO (139A)					
1	Q043	3	2	3	4

Ring Column No

(a) Are the payments for
 structure? →
 furniture and contents? →
 structure and furniture and contents? →
 personal possessions? (Specify) →

1	SCPT	YINS (139B)			
2	Q043	A	2	2	2
3			3	3	3
4			4	4	4

- Ask (b) & (c)
- Ask (b)-(e)
- Specify below and ask (b) & (c)

(b) How much was the last premium? →

SCPPAMT (139C)				
Q043	B			

- Ask (c)

(c) How long did this cover? →

Enter period code →

PERC 139C (139D)			
Q043	C		

If code 9, specify period

See (d)

If premium covers structure and furniture and contents (coded 3 at 43(a)) and items cannot be separated, ask

(d) Insured value of structure →

ACCOM	VAL (146)			
Q043	D			

- Ask (e)

(e) Insured value of furniture and contents →

CONVAL (147)				
Q043	E			

- Ask 44

To all households

ask respondents

RECORD 25

44 Do (any of) you pay premiums on any life, death or endowment policies?

Include
Personal pension, annuities, education, endowment, mortgage protection, fixed term assurance, death and burial

Exclude
National Insurance

LIFEINS (154)

Q044

Yes 1
No 2

1
2

Record details
- in grid below
- Go to 45

RECORD 71

Per No	Ring Line No	Type of policy	Year insurance taken out		Enter period code	If code 9 specify period	Amount paid	
			OFF USE	Enter year as two digit code			£	p
	2		4	5	6			
	Q044		Q044	Q044	Q044			
	3							
	(154A)		(154c)	(154d)	(154e)			(154f)
	5		PE	YR				
	6		NSTY	NST	C154F			SBMT
	7		LI	LI	PER			LI
	8							

- Ask 45

15 Do (any of) you regularly pay premiums on other policies such as personal accident or private medical insurance? RECORD 25

Include
Friendly Societies sickness insurance, private medical insurance schemes such as BUPA, PPP etc, animal insurance, works sick clubs

Exclude
Car, motor cycle, house contents or personal possessions insurance, holiday insurance

MEDINETC (164)

Yes Q045 1
No 2

1
2

Record details
- in grid below
- Go to 46

RECORD 72

Per No	Ring Line No	Type of policy	Insurance company	OFF USE	Enter period code	If code 9 specify period	Amount paid	
							£	p
	2			4	5			
	Q045			Q045	Q045			Q045
	(164A)			(164c)	(164d)			(164e)
	3			TYE	164E			AMT
	4			MINS	PERC			MINS

- Ask 46

To all households

Ask all spenders

RECORD 25

46 In your (part of this) accommodation do (any of) you (or your children under 16) have any TV sets, video recorders, home computers or TV games?

TVVIDEO (171A)

0046 No to all Yes to all

1
2

- Ask (a) & (b)
- Go to 47

RECORD 73

Enter children's items under parent's Per No

Per No

Ring Column No

Use separate column for each item

TVPERNO (171B)	0046	2		
----------------	------	---	--	--

TVITEMNO (171C)	0046	3		
-----------------	------	---	--	--

1	1	1	1
2	2	2	2
3	3	3	3
TVTYPE (171D)	0046	A	4

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

- Ask (b)

(b) Do you rent it?

Yes
No

TVRENTED (171E)	0046	B	1
2	2	2	2

- Ask (I)
- Go to 47

(I) Do you pay the rent by

Running prompt
regular payments to a rental company
slot meter
other? (Specify)

TVHOWPAY (171F)	0046	B 1	1
2	2	2	2
3	3	3	3

- Ask (II)-(III)
- Go to (c)
- Specify below and ask (II)-(III)

(II) How much did you pay last time?

TVPAYAMT (171G)	0046	B 2		
-----------------	------	-----	--	--

- Ask (III)

(III) How long did this cover?

Enter period code

PERC 171G (171H)	0046	B 3		
------------------	------	-----	--	--

If code 9, specify period

- Go to 47

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

(c) Did you get a rebate when the meter was last cleared?

Yes
No

TVSMR (171I)	0046	C	
2	2	2	2

- Ask (I)-(II)
- Go to 47

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

TVSMRAMT (171J)	0046	C 1		
-----------------	------	-----	--	--

- Ask (II)

(II) How long did this cover?

Enter period code

PERC 171J (171K)	0046	C 2		
------------------	------	-----	--	--

If code 9, specify period

- Ask 47

To all households (Ask rich or wife)

47 Is there a telephone installed in your (part of this) accommodation?

Exclude disconnected telephones

INA102 (258)

Yes \rightarrow

1
2

 - Ask (a)-(c)

No \rightarrow

1
2

 - Go to 48

Q047

(a) How much was the last account/advice you paid to British Telecom including any installation charge you may have paid?

TELEBILL (259)

Q047A

--	--

 - Ask (b)

If no account submitted or if account is less than minimum quarterly rental charge, specify why

--

(b) How long did this cover?

PERC 259 (260)

Enter Q047 B
Period code

--

 If code 9, specify period

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

TELOSCON (261)

Yes \rightarrow 1
No \rightarrow Q047 C 2

1
2

 - Ask (I)-(III)
- Go to 48

(i) What was your share?

TELSHAMT (261A)

Q047 C 1

--	--

 - Ask (II)

(ii) How long did this cover?

PERC 261A (261B)

Enter Q047 C 2
Period code

--

 If code 9, specify period

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

TELSHBUS (261C)

Yes \rightarrow 1
No \rightarrow Q047 C 3

1
2

 - Ask 48

To all spenders

Ask all spenders

48 In the last 12 months, that is since have (any of) you bought a TV licence?

TVLIC (265)

Yes \rightarrow 1
No \rightarrow Q048

1
2

 - Ask (a)
- Go to 49

(a) How much have you paid in the last 12 months?

TVLICFEE (266)

Q048A

--	--

 - Ask 49

To all households (Ask hoh or wife)

49 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 →

1
2

INA108 (180A)
Q049 1

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

Yes →
No →

1
2

INA164 (180B)
Q049 2

a separate refrigerator?

Yes →
No →

1
2

INA165 (180c)
Q049 3

a separate deep freeze?

Yes →
No →

1
2

INA166 (180D)
- Ask 50 Q049 4

50 In this accommodation do you have central heating by

Individual prompt

electricity? Include storage heaters

Yes →
No →

1
2

INA150 (181A)
Q050 1

gas?

Yes →
No →

1
2

INA151 (181B)
Q050 2

solid fuel?

Yes →
No →

1
2

INA153 (181c)
Q050 3

oil?

Yes →
No →

1
2

INA152 (181D)
Q050 4

DK fuel

1

See (a) INA154 (181E)
Q050 5

To all with oil central heating

DNA (Others)

N

- Go to 51

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

Yes →
No →

1
2

OILPURCH (192)
- Ask (i)
- Go to 51 Q050A 1

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

DK →

1	

OILEXP (193)
Q050A 2
Ask 51 OILEXPDK (193A)
Q050A 3

To all households (Ask hoh or wife)

51 Do you have electricity supplied to your (part of this) accommodation?

ELEC (195)

Yes
No Q051

1
2

- Ask (a)
- Go to 61

(a) Do you pay for your electricity by

INA130 (196)

Slot meter*
Account Q051A
Board Budgeting Scheme
Or by some other method?

1
2
3
4
5

- Go to 52
- Go to 53
- Go to 58
- Specify below and go to 53

(N Ireland only)
COCD

- Go to 53

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

To those paying by slot meter (coded 1 at 51(a))

52 In the last 12 months, that is since have you received a rebate?

ELECSM (197)

Yes
No Q052

1
2

- Ask (a) & (b)
- Go to 61

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

ELECMREB (198)

Q052 A

--	--

- Ask (b)

(b) How long did this cover?

PERC 198 (199)

Enter Q052 B
period code

--

If code 9, specify period

Go to 61

To those paying by account or some other method (coded 2 or 4 at 51(a))

53 How much was your last account payment?

ELECALC (202)

Q053

--	--

- Ask 54

Include units consumed, standing charge, meter rent and installation

Exclude rent of appliances hire purchase, loans and regular maintenance charges

54 How long did this cover?

PERC 202 (203)

Enter Q054
period code

--

If code 9, specify period

55 What was the date of your last account (as shown on the account)?

ELECDAT (204)

Q055 1

Month

Enter month and year as two-digit code

- Go to 61

Year 19

ELACDTRDK (204A)

Q055

1

- Go to 61

To those paying by board budgeting scheme (coded 3 at 51(a))

56 How much was your last payment under this scheme? → **ELEC BBS (200)**
Q056 →

£	p

 - Ask 57

57 How long did this cover? → **PERC 200 (201)**
 Enter **Q057** period code →

 If code 9, specify period

58 How much was the charge on your last advice? → **ELEC CHAR (201A)**
Q058 →

£	p

 - Ask 59

Include units consumed, standing charge, meter rent and installation

Exclude rent of appliances, hire purchase, loans and regular maintenance charges

59 How long did this cover? → **PERC 201A (201B)**
 Enter **Q059** period code →

 If code 9, specify period

60 What was the date of your last account/advice (as shown on the account/advice)? → **ELCHDAT (201C)**
Q060 →

Month	Year
1	19

 - Ask 61

Enter month and year as two-digit code

ELCHDTDK (201D)
Q060 2 →

DK
1

 - Ask 61

To all households (Ask hoh or wife)

61 Do you have gas supplied to your (part of this) accommodation?

GAS (185)
Yes
No Q061

E	P
	1
	2

- Ask (a)
- Go to 71

(a) Do you pay for your gas by

Running Prompt

INA128 (186)
Slot meter*
Account Q061A
Board Budgeting Scheme
Or by some other method?

1
2
3
4

- Go to 62
- Go to 63
- Go to 66
Specify below and go to 63

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

To those paying by slot meter (coded 1 at 61(a))

62 In the last 12 months, that is since have you received a rebate?

GASSM (187)
Yes
No Q062

1
2

- Ask (a) & (b)
- Go to 71

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

GASSMREB (188)
Q062A

--	--

- Ask (b)

(b) How long did this cover?

PERC 188 (189)
Enter Q062B period code

--

If code 9, specify period

Go to 71

To those paying by account or some other method (coded 2 or 4 at 61(a))

63 How much was your last account payment?

GASACC (192)
Q063

--	--

- Ask 64

Include units consumed, standing charge, meter rent and installation

Exclude rent of appliances hire purchase, loans and regular maintenance charges

64 How long did this cover?

PERC 192 (193)
Enter Q064 period code

--

If code 9, specify period

65 What was the date of your last account (as shown on the account)?

GACDAT (194)
Month
Q065 1

Go to 71

Enter month and year as two-digit code

Year 19

GACJTDK (194A) DK

21

To those paying by board budgeting scheme (coded 3 at 61(s))

GASBBS (190)
Q066

66 How much was your last payment under this scheme? →

£	p

- Ask 67

67 How long did this cover?

PERC 190 (191)
Enter Q067
period code →

--

If code 9, specify period

--

68 How much was the charge on your last advice? →

GASCHAR (191A)
Q068

--	--

- Ask 69

Include units consumed, standing charge, meter rent and installation

Exclude rent of appliances hire purchase, loans and regular maintenance charges

69 How long did this cover?

PERC 191A (191B)
Enter Q069
period code →

--

If code 9, specify period

--

70 What was the date of your last advice (as shown on the advice)? →

GACHDAT (191C)
Q070 1 Month

Enter month and year as two-digit code

- Ask 71

Year 19

GACHDTDK (A1D)
Q070 2 DK →

1

- Ask 71

To all households

Ask all spenders

71 Do (any of) you at present own or have continuous use of a car, van, motor cycle, moped or other motor vehicle? RECORD 25

MOTORVEH (205)

Yes → 1
No 0071 1 → 2

- Ask (a) & (b)
- Go to 73

RECORD 74

Use separate column for each vehicle

C	PER	SNO (206)	0071	2		
---	-----	-----------	------	---	--	--

Per No →

Ring Column No

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

(a) Is it a

Running prompt

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

1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
VEHT YPE (207)	0071 A		5

Ask (b)

- Specify below and ask (b)

£ p £ p £ p £ p

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

Nil →

CARTAX (208)	0071 B1		
9	9	9	9

If nil, code below and go to (e)

CARTAXNL (208A) 0071 B2

(c) How long did this cover?

Enter period code →

PERC208 (209)	0071 C		
---------------	--------	--	--

If code 9, specify period

(d) When did you last renew the Road Fund Tax?

Month

CARTXDAT (210)	0071 D		
----------------	--------	--	--

Ask (e)

Enter month and year as two-digit code

Year 19

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

Nil →

CARINS (211)	0071 E1		
9	9	9	9

If nil, code below and go to (g)

CARINSNL (211A) 0071 E2

(f) How long did this cover?

Enter period code →

PERC211 (212)	0071 F		
---------------	--------	--	--

If code 9, specify period

(g) Do you own the (type of vehicle) or do you have continuous use of it?

Own →
Continuous use →

CONTUSE (213)	0071 G	1	2
2	2	2	2

- See 72
- See (h)

To all who have continuous use of car
(coded 1 at 71(a) and 2 at 71(g))

Use separate column for each vehicle

Per. No →

DNA Others (owned cars, all vans, motorcycles, mopeds etc) →

- See 72

(h) Is the car provided* for your continuous use by

Running Prompt your employer →
spouse's employer →
other specify? →

- Ask 72
- Specify below and ask 72

*Exclude cars purchased wholly or partly from employer

CARPROV (214)	Q071 H	1
2	2	2
3	3	3

To all with cars

DNA Others (vans, motorcycles, mopeds etc) →

- Go to 73

72 Does an employer provide* you with any petrol for private motoring** in this car?

Yes →
No →

- Ask (i)
- Go to 73

*Provide = pay for, supply free or refund expenditure

PETROL (215)	Q072 1	1
2	2	2

**Include in private motoring travel to and from normal place of work

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

Some →
All →

- Ask 73

PETPROV (215A)	Q072 2	1
2	2	2

To all households

Ask all spenders

RECORD 25

73 (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 car, van, motor cycle, moped or other motor vehicle?

OLDMVEH (216)

Q073 1

Yes	→	1
No	→	2

- Ask (a) & (b)
- See 74

RECORD 75

Use separate column for each vehicle			
OCPEKSMO (217)	Q073 2		

Per No →

OCITEMNO (217A) Q073 3

Ring Column No

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

(a) Was it a

Running prompt

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

1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
OCARTY PE (218)	Q073 A		
5	5	5	5

Ask (b)

- Specify below and ask (b)

(b) How much have you paid in Road Fund Tax during the last 12 months for the

(type of vehicle)

?

Nil →

OCARTAX (219)	Q073 B 1		
9	9	9	9

If nil, code below and go to (e)

OCARTXNL (219A) Q073 B 2

(c) How long did this cover?

Enter period code →

PERC219 (220)	Q073 C		
---------------	--------	--	--

If code 9, specify period

(d) When did you last renew the Road Fund Tax?

Enter month and year as two-digit code

Month

Year 19

OCARTAX DAT (221)	Q073 D		

Ask (e)

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

(type of vehicle)

?

Nil →

OCAR INS (222)	Q073 E 1		
9	9	9	9

If nil, code below and go to (g)

OCARINNL (222A) Q073 E 2

(f) How long did this cover?

Enter period code →

PERC222 (223)	Q073 F		
---------------	--------	--	--

If code 9, specify period

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

Own →
Continuous use →

OCCONT (224)	Q073 G		
1	1	1	1
2	2	2	2

See 74

RECORD 76

To all spenders who own or have owned a vehicle during the last 12 months (coded 1 at 71(g) or 73(g))

DNA _____ N _____ - Go to 76

Use separate column for each vehicle							
CPPERSN	0	(226)	Q074	1			

Per No →

Ring Column No

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

74 During the last 12 months, did (any of) you buy outright, that is with cash or loan from a friend or relative (any of) the vehicle(s) you have mentioned? Include bank overdrafts

Yes →
No →

CARBUR	(226 ¹ / ₂)	Q074	3	1			
				2			

- Ask (a)-(f)
- Go to 75

Exclude Loan from organisation, bank, finance house or H P (enter at 79-85)

(a) Was it a

Running prompt

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

1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
CATYPE	(227)	Q074 A	5
5	5	5	5

Ask (b)
Specify below and ask (b)-(f)

(b) Was it new or secondhand?

New →
Secondhand →

NOCARP	(229 ¹ / ₂)	Q074 B	1
			2

Ask (c)

(c) When was the vehicle acquired?

Enter month and year as two-digit code

Month

CARPDAT	(229)	Q074 C					
---------	-------	--------	--	--	--	--	--

Year 19

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

Ask (d)

(d) What was the total cash price of the vehicle before deducting anything for part exchange or trade in?

CARPA	MT	(230)		Q074 D			
-------	----	-------	--	--------	--	--	--

Ask (e)

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

Yes →
No →

CARPINS	(230 ¹ / ₂)	Q074 E 1	1
			2

Ask (f)
Go to (f)

(f) How much was included for

Running prompt

Road fund tax →

CPCTAXAM	(232)	Q074 E 2				
----------	-------	----------	--	--	--	--

Vehicle Insurance? →

CPINSAMT	(234)	Q074 E 3				
----------	-------	----------	--	--	--	--

Ask (f)

(f) Was anything allowed for part exchange or trade in?

Yes →
No →

CPARTEX	(234 A)	Q074 F	1
			2

Ask (f)
Go to 75

RECORD 95

To all spenders who own or have owned a vehicle during the last 12 months (coded 1 at 71(g) or 1 at 73(g))

DNA _____ → N - Go to 76

Use separate column for each vehicle							
Per No →	CSPERSNO	(235A)		Q075	1		

Ring Column No	CSITEMNO	(235B)		Q075	2		
	1	2	3	4			

75 In the last 12 months that is since have (any of) you sold any vehicles belonging to you (excluding the trade-in/part-exchange you mentioned earlier)?

Yes →	CARSSOLD	(236)		Q075	3		
No →	1	1	1	1	2	2	2

- Ask (a)-(c)
- Go to 76

(a) Was it a

Running prompt

Car →	CSOLDTYP	(236A)		Q075	A		
Van →	1	1	1	1	2	2	2
Motor cycle →	2	2	2	2	3	3	3
Moped →	3	3	3	3	4	4	4
Other motor vehicle specify? →	4	4	4	4	5	5	5

Ask (b) & (c)

Specify below and ask (b) & (c)

(b) When did you sell the vehicle?

Enter month and year as two-digit code

Month	CSOLD	DAT	(237)	Q075	B		
Year 19							

Ask (c)

(c) Did you receive payment by cash cheque or giro?

Yes →	CRECPAY	(239)		Q075	C		
No →	1	1	1	1	2	2	2

- Ask (l)
- Go to 76

(l) How much did you receive?

CRECA	MT	(239)		Q075	C1		
-------	----	-------	--	------	----	--	--

- Ask 76

To all households

Ask all spenders

RECORD 25

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

VETAXREF (241)

Q076 1

Yes \longrightarrow
No \longrightarrow

1
2

- Ask (a)
- Go to 77

RECORD 84

Use separate column for each refund							
VTR	PER	NO	(240A)		Q076	2	

Per No \longrightarrow

£	p	£	p	£	p	£	p
VET	KR	FAM	(242)	Q076	A		

(a) How much was (were) the refund(s)? \longrightarrow

- Ask 77

RECORD 25

77 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?

SEASONTK (245)

Yes \longrightarrow
No Q077 1

1
2

- Record details in grid below
- Go to 78

RECORD 85

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 102) and O A P. concessionary fare passes (see 63 on income schedule)

Per No 2	Ring Line No	3	Mode of transport eg rail only, bus only rail/bus/tube combined	Enter period code	If code 9, specify period	Amount paid		OFF USE 6
						£	p	
Q077	1	STITEMNO (2456) Q077			PERC 2453 (245c) Q077	Q077	5	Q077
(245A)	2					Q077		(245E)
RNO	3					STAM T (245D)		STOM ODE
STPE	4							

- Ask 78

RECORD 25

To all households

Ask all spenders

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

CREDCARD(2706)

Yes 1 - Ask (a)
No 0078 1 - Go to 79

1
2

RECORD 59

CREDPNO(270A)
0078 2

Per No
NOCREDCD(270C)

(a) How many do you have? 0078A

Use separate column for each spender with card(s)							

Ask 79

DO NOT KEY

		Use separate column for each arrangement							
		No	Yes	Yes	Yes	Yes	Yes	Yes	
79	Are (any of) you at present making regular payments to any of the following								
Individual Prompt	a bank for a personal loan, (that is a loan given originally for specific goods or services)?	X	1	1	1	1	1	1	Ask 80
	a finance house?	X	1	1	1	1	1	1	
	an organisation granting a second mortgage?	X	1	1	1	1	1	1	
	your employer as repayments of a loan?	X	2	2	2	2	2	2	
(Include repayments deducted from salary)									
80	Are (any of) you at present paying instalments under a hire purchase or credit sale agreement?	X	3	3	3	3	3	3	Ask 81
81	Are (any of) you at present paying instalments to any of the following								
Individual Prompt	A chargecard budget or option account at a shop or store? (Exclude bank budget accounts)	X	4	4	4	4	4	4	Ask 82
	Any other shop running a club?	X	4	4	4	4	4	4	
	A Mail Order club as an agent or through a friend or relative?	X	4	4	4	4	4	4	
	Any other Mail Order organisation?	X	4	4	4	4	4	4	
	A Check Trader? Exclude loans, h p and credit sale	X	4	4	4	4	4	4	
	Other person or organisation? Specify	X	5	5	5	5	5	5	
Exclude credit card arrangements									
82	Have (any of) you made a down payment on anything on which you have not yet paid an instalment?	X	Y	Y	Y	Y	Y	Y	If yes, reprompt 79-81 and specify type of arrangement in next column

No to all

X

Interviewer note

Check back to 79 to see if 83 applies
Check back to 80 to see if 84 applies

To all spenders with instalments coded 1 or 2 at 79

Use separate column for each arrangement

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

LPERSNO (272)
Q083 1
Per No.

LITEMNO (272A)
Q083 2
Ring Column No

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

LOANCODE (272B)
Q083 3 79
Code from
Suggest consulting agreement or payments card before asking 83

E	p	E	p

LOANAMT (274)
Q083A
83 (a) How much was the loan? Exclude interest

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

- Ask (b)

LOANREP (275)
Q083 B
(b) How much was your last repayment?

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

- Ask (c)

PERC275 (276)
Q083 C
(c) How long did this cover? Enter period code

If code 9, specify period

LOANDAT (282)
Q083 D
(d) When did you obtain the loan? Enter month and year as two-digit code

- Ask (e)

(e) What items or services did you obtain with the loan?

- Ask (f)

If more than one item/service obtained on the arrangement, use a separate column for each item or service and ask (f)-(j) for each item

OFF USE	LITEMP	UR (277)	Q083 E 1
OFF USE	LQUAL	(277A)	Q083 E 2

LNOITEM (278)
Q083 F
(f) Was the item new or second hand? New S/hand DNA

1	1	1	1
2	2	2	2
3	3	3	3

- Ask (g)

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

- Ask (h)

LCASHP (279)
Q083 H
(h) How much was the cash price of (the goods or service)? Include Down payment Part exchange

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

- Ask (i)

LPARTEX (280)
Q083 I
(i) How much was allowed in part exchange?

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

- Ask (j)

LOANDEF (291)
Q083 J
(j) How much if anything, did you have to put down in addition to the amount borrowed? (exclude part exchange)

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

- See 84

RECORD 78

To all spenders with instalments coded 3 at 80

DNA _____ → N - See 85

HPERSNO (287)

Suggest consulting agreement or payments card before asking 84

HPITEMNO (287A) Per No →
Ring Column No
Φ084 1
Φ084 2

Use separate column for each arrangement							
1	2	3	4				

Note Where a downpayment (or part exchange) has been made but instalment not yet paid, please complete all questions except 84(e) and (f)

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

Item/service

- Ask (b)

HPITEMA (288)
Φ084 A 1

HPQUAL (288A)
Φ084 A 2

OFF USE							
OFF USE							

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

- Ask (c)

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

HPNEWOLD (289) New
S/hand
DNA
Φ084 C

1	1	1	1
2	2	2	2
3	3	3	3

- Ask (d)

(d) How much was the cash price of (the item/service)? Exclude interest

HPCASHPR (290)
Φ084 D

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

- Ask (e)

(e) How much was the last instalment?

HPINSTAL (291)
Φ084 E

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

- Ask (f)

(f) During a period did this cover?

PERC291 (292)
Φ084 F Enter period code

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

If code 9, specify period

(g) When did you obtain the item or service?

HPDAT (293)
Φ084 G Month

- Ask (h)

Enter month and year as two-digit code

Year 19

(h) How much was allowed in part exchange?

HPARTEX (294)
Φ084 H

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

- Ask (i)

(i) How much was the down payment (excluding part exchange allowed)?

HPDEPOS (295)
Φ084 I

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

- See 85

To all households.

Ask all spenders

86 Do (any of) you have a second dwelling?
 SECDWELL (301) P
 Q086 Yes →

1
2

 - Ask (a)
 No →

1
2

 - Go to 87

Include as second dwelling Permanent second dwelling such as holiday home

Exclude as second dwelling. New home to which household member(s) are moving

(a) Is the second dwelling in England, Scotland, Wales or Northern Ireland?
 SEDWINUK (301a) P
 Q086 A Yes →

1
2

 - Ask 87-90 for main and second dwelling if a second dwelling in U K
 No →

1
2

 - Ask 87

SDWCHCON (302 B) Q086 B 2			OFF USE
SDWCHDIY (302 C) Q086 B 3			
SDWCHBUS (302 D) Q086 B 4	1	2	
SDWCHBAM (302 E) Q086 B 5			

SDCHRECN (302 G) Q086 C 2			OFF USE
SDCHREDY (302 H) Q086 C 3			
SDCHREBS (302 I) Q086 C 4	1	2	
SDCHREBA (302 J) Q086 C 5			

To all households

Ask all spenders

87 In the last 12 months, that is since _____ have (any of) you paid for central heating to be installed in this accommodation?

MDWCH (303a)
Q087

£	p
1	2

- Ask (a)-(f)
- Go to 88

Include Expenditure on home to which household member(s) are moving
Include Do-it-yourself work

(a) What type of central heating was/is it?

Individual prompt

Gas fired _____	W
Electric, incl storage heaters and under floor _____	X
Oil fired _____	Y
Solid fuel _____	Z

- Ask (b)

(b) Did you pay someone else to instal it or was it a do-it-yourself job or was it some of each?

Someone else only _____	X
Do-it-yourself only _____	Y
Some of each _____	Z

- Ask (c)

(c) During the last 12 months, how much did you pay, excluding any interest paid on loans?

MDWCHCON (303b)
Q087 C 1

Paid to someone else _____		
MDWCHDIY (303c) Q087 C 2		
Paid for do-it-yourself _____		

- Ask (d)

(d) Did you pay for the central heating by

Cash (cheque, coin or giro) _____	V
Credit card _____	W
Loan _____	X
Other instalment credit _____	Y
Part cash, part loan? _____	Z

- Ask (e)

(e) Was any of this reclaimed or allowable as business expense?

MDWCHBUS (303d)
Q087 E

Yes	1
No	2

- Ask (f)
- Go to (f)

(f) How much was reclaimed or is allowable?

MDWCHBAM (303e)
Q087 E 1

--	--

- Ask (f)

(f) In which month(s) did you make the payments?

Enter month as two digit code

Month

Month

Month

- Ask 88

If second dwelling in U K , ask 87(a)-(f) and record details in left hand margin

To all household -

Ask all spenders

88 In the last 12 months, that is since have (any of) you paid for central heating repairs, servicing or maintenance of central heating in this accommodation?

MDWCHRE (303 F)
Q088

£	P
Yes →	1
No →	2

- Ask (a)-(e)
- Go to 89

Include Expenditure on home to which household member(s) are moving
Include Do-it-yourself work

(a) Did you pay someone else to carry out the work or was it a do-it-yourself job or was it some of each?

Someone else only →	X
Do-it-yourself only →	Y
Some of each →	Z

- Ask (b)

(b) During the last 12 months, how much did you pay excluding any interest paid on loans?

MDCHRECN (303 G)
Q088 B 1
Paid to someone else →
MDCHREDDY (303 H)
Q088 B 2
Paid for do-it-yourself →

- Ask (c)

(c) Did you pay for the repairs servicing or maintenance by

Cash (cheque coin or giro) →
Credit card →
Loan →
Other instalment credit →
Part cash, part loan? →

V
W
X
Y
Z

- Ask (d)

(d) Was any of this reclaimed or allowable as business expense?

MDCHREBS (303 I)
Q088 D

Yes →	1
No →	2

- Ask (i)
- Go to (e)

(i) How much was reclaimed or is allowable? →

MDCHREBA (303 J)
Q088 D 1

--	--

- Ask (e)

(e) In which month(s) did you make the payments?

Enter month as two digit code

Month

Month

Month

- Ask 89

If second dwelling in U K, ask 88(a)-(e) and record details in left hand margin

To all households

Ask all spenders

Refer informant to Prompt Card A

89 In the last 12 months, that is since _____ have (any of) you paid for any of the extensions enlargements or improvements shown on this card to be carried out at this accommodation?

Include Expenditure on home to which household member(s) are moving

Include Do-it-yourself work

(a) Did you pay someone else to carry out the work or was it a Do-it-yourself job or was it some of each?

(b) During the last 12 months how much did you pay, excluding any interest paid on loans?

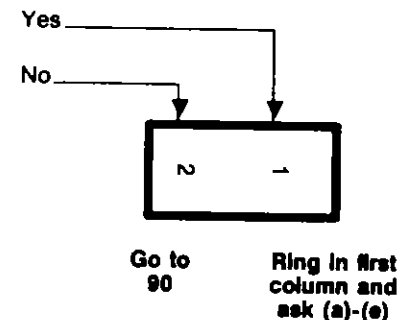
(c) Did you pay by cash (cheque, coin or giro), credit card loan, other instalment credit or part cash and part loan?

(d) Was any of this reclaimed or allowable as business expense? If yes, ask (i)

(i) How much was allowable as business expense?

(e) In which month(s) and year did you make the payments?

Ask about second dwelling in UK # coded 1 at 86(a)



EXTIMPS (3042)
Q089 1

36

PAGE A 316

DO NOT KEY																	
	YES		(a) Paid			(b) Total cost paid		(c) Method of payment					(d) Reclaimed business expense?		(d)(i) Amount allowed as business expense?	(e) Payment made in	
	Main dwelling	Second dwelling	Someone else	DIY	Some of each	Someone else	DIY	Cash	Credit card	Loan	Other	Part cash part loan	Yes	No	£	Month	Year
a building extension?	1	2	1	2	3			1	2	3	4	5	Y	X			198
garden patio?	1	2	1	2	3			1	2	3	4	5	Y	X			198

35

kitchen/bathroom unit?

1 2 1 2 3

1 2 3 4 5

Y X

198

double glazing?

1 2 1 2 3

1 2 3 4 5

Y X

198

wall insulation?

1 2 1 2 3

1 2 3 4 5

Y X

198

room conversion?

1 2 1 2 3

1 2 3 4 5

Y X

198

garage?

1 2 1 2 3

1 2 3 4 5

Y X

198

car port?

1 2 1 2 3

1 2 3 4 5

Y X

198

concrete base for vehicle?

1 2 1 2 3

1 2 3 4 5

Y X

198

driveway?

1 2 1 2 3

1 2 3 4 5

Y X

198

garden shed?

1 2 1 2 3

1 2 3 4 5

Y X

198

garden fence?

1 2 1 2 3

1 2 3 4 5

Y X

198

any other enlargements, extensions or improvements of £50 or more?

1 2 1 2 3

1 2 3 4 5

Y X

198

Specify

EXTSAMT (304 F)
Q089 4
EXTSAMGS (304 G)
Q089 5

EXTSAMT (304 F)
Q089 2
EXTSAMGS (304 G)
Q089 3

		OFF USE
--	--	---------

		OFF USE
--	--	---------

E P

To all households

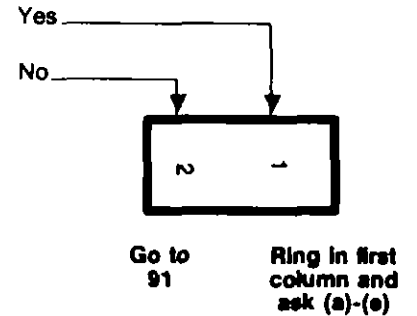
Ask all spenders

Refer informant to Prompt Card B

90 In the last 12 months, that is since _____, have (any of) you paid for any of the repairs maintenance replacements or decorations shown on this card to be carried out at this accommodation?

Include Expenditure on home to which household member(s) are moving

Include Do-it-yourself work



(a) Did you pay someone else to carry out the work or was it a Do-it-yourself job or was it some of each?

(b) During the last 12 months, how much did you pay, excluding any interest paid on loans?

(c) Did you pay by cash (cheque coin or giro), credit card, loan, other instalment credit or part cash and part loan?

(d) Was any of this reclaimed or allowable as business expense? If yes, ask (i)

(i) How much was allowable as business expense?

(e) In which month(s) and year did you make the payments?

MAINT (3044)
 0090 - 1

Ask about second dwelling in UK if coded 1 at 86(a)

DO NOT KEY																
YES		(a) Paid			(b) Total cost paid		(c) Method of payment					(d) Reclaimed business expense?		(d)(i) Amount allowed as business expense?	(e) Payment made in	
Main dwelling	Second dwelling	Someone else	DIY	Some of each	Someone else	DIY	Cash	Credit card	Loan	Other	Part cash part loan	Yes	No	£	Month	Year
					£	£										
interior painting?	1	2	1	2	3		1	2	3	4	5	Y	X			198
exterior painting?	1	2	1	2	3		1	2	3	4	5	Y	X			198

Repairs or replacements of

guttering?

1 2 1 2 3

1 2 3 4 5

Y X

198

roof?

1 2 1 2 3

1 2 3 4 5

Y X

198

door?

1 2 1 2 3

1 2 3 4 5

Y X

198

windows (exclude single/double glazing)?

1 2 1 2 3

1 2 3 4 5

Y X

198

walls e.g brickwork, stucco?

1 2 1 2 3

1 2 3 4 5

Y X

198

plumbing?

1 2 1 2 3

1 2 3 4 5

Y X

198

electricity system or rewiring?

1 2 1 2 3

1 2 3 4 5

Y X

198

plaster?

1 2 1 2 3

1 2 3 4 5

Y X

198

woodwork?

1 2 1 2 3

1 2 3 4 5

Y X

198

Any other repairs, replacements or decorations of £50 or more?

1 2 1 2 3

1 2 3 4 5

Y X

198

Specify

MAINT(304K)
Q090 4
MAINT(304L)
Q090 5

MAINT(304I)
Q090 2
MAINT(304S)
Q090 3

Ask 91

		OFF USE

		OFF USE

E P

To all households

Ask all spenders

91 During the last 12 months, that is since _____, have (any of) you made any payments for package or self-catering holidays, either in this country or abroad, which (any of) you have already taken or will be taking in the future?

HOLSCPAC (305A)
Q091 1

RECORD 25

- | | | |
|----------------------------------|---|---------------|
| Both _____ | 1 | - Ask 92 & 93 |
| Package holiday only _____ | 2 | - Ask 92 |
| Self-catering holiday only _____ | 3 | - Go to 93 |
| No to both _____ | 4 | - Go to 94 |

RECORD 104

PACKPNO (305B)
Q091 2

Per No
PACKINO (305C) Ring Column No
Q091 3

Use separate column for each holiday							
1	2	3	4				

92 During the last 12 months how much have you paid for the package holiday?
PACKAMT (305D)
Q092

£	p	£	p	£	p	£	p

- Ask (a)

(a) Did you pay by

Cash (cheque coin or giro) _____	V	V	V	V
Credit card _____	W	W	W	W
Loan _____	X	X	X	X
Other instalment credit _____	Y	Y	Y	Y
Part cash part loan? _____	Z	Z	Z	Z

- Ask (b)

To all coded 1 or 2 at 91

Per No

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

(b) In which month(s) did you pay

Enter month as two digit code

Month

Month

Month

Ask (c)

(c) Was/will the holiday be taken abroad, that is outside England, Scotland, Wales or Northern Ireland?

PACOUTUK (305E)
Q092C

Yes →
No →

1	1	1	1
2	2	2	2

Ask (d)
See 93

(d) Have you already taken the holiday or are you taking it in the future?

PACTKFT (305F)
Q092D

Yes →
No →

1	1	1	1
2	2	2	2

Ask (i)
See 93

(i) During the last 12 months, how much did you spend abroad over and above the cost of the package?

PACSPMON (305G)
Q092D1

£	p	£	p	£	p	£	p

See 93

Include duty free goods

To spenders who have made payments for self-catering holidays (coded 1 or 3 at 91)

RECORD 25

93 Was the self-catering holiday in England, Scotland, Wales or Northern Ireland?

HLSCINUK (306A)

Yes
No 093 1

1
2

- Ask (a)-(c)
- Go to 94

RECORD 105

HLSCPNO (306B)
093 2

HLSCINO (306C) Per No
093 3 Ring Column No

Use separate column for each holiday							
1	2	3	4				

(a) During the last 12 months how much in total did you pay for camping site fees hostel charges or hire of accommodation or caravan? HLSCAMT(306D) 093 A

£	p	£	p	£	p	£	p

- Ask (b)

(b) Did you pay by

Cash (cheque coin or giro)
Credit card
Loan
Other instalment credit
Part cash part loan?

V	V	V	V
W	W	W	W
X	X	X	X
Y	Y	Y	Y
Z	Z	Z	Z

- Ask (c)

(c) In which month(s) did you pay for it?

Enter month as two digit code

Month
Month
Month

- Ask 94

To all households

Ask all spenders

RECORD 25

94 In the last 12 months, that is since did (any of) you pay for any holidays at hotels, boarding houses, holiday camps or lodgings in England, Scotland, Wales or Northern Ireland?

HLCATUK (307A)

Q094 1 Yes _____
No _____

1
2

- Ask (a)-(c)
- Go to 95

RECORD 106

HLCATPNO (307B)

Q094 2

HLCATINO (307C) Per No

Q094 3 Ring Column No.

Use separate column for each holiday							
1	2	3	4				

(a) In the last 12 months how much in total did you spend on accommodation in the hotel or boarding house? HLCATAMT (307D) Q094 A

£	p	£	p	£	p	£	p

- Ask (b)

Include food if part of the accommodation charge

(b) Did you pay by

- Cash (cheque, coin or giro) _____
- Credit card _____
- Loan _____
- Other instalment credit _____
- Part cash, part loan? _____

V	V	V	V
W	W	W	W
X	X	X	X
Y	Y	Y	Y
Z	Z	Z	Z

- Ask (c)

(c) In which month(s) did you pay for it?

Enter month as two digit code

Month

Month

Month

- Ask 95

To all households

Ask all respondents

RECORD 25

95 In the last 12 months, that is since have (any of) you paid or are (any of) you paying for any (other) holidays taken abroad?

Exclude holidays taken in England, Scotland, Wales or Northern Ireland

HLOUTUK (3086)

Q095 1

Yes →
No →

1
2

- Ask (a)-(c)
- Go to 96

RECORD 107

HLOTHPNO (308C)

Q095 2

HLOTHINO (308D) Per No

Q095 3 Ring Column No

Use separate column for each holiday							
1	2	3	4	5	6	7	8

(a) In the last 12 months how much in total did you spend abroad including duty free goods? HLOTHAMT (308E) Q095A

Include Channel Ferry or hovercraft if ticket bought abroad

£	p	£	p	£	p	£	p

- Ask (b)

(b) Did you pay for the holiday by

Cash (cheque, coin or giro) →
Credit card →
Loan →
Other instalment credit →
Part cash, part loan? →

V	V	V	V
W	W	W	W
X	X	X	X
Y	Y	Y	Y
Z	Z	Z	Z

- Ask (c)

(c) In which month(s) did you pay for it?

Enter month as two digit code

Month

Month

Month

- Ask 96



To all households

Ask all spenders

RECORD 25.

BANKACS (309)

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

Yes → 1
No Q096 1 → 2

- Ask (a) & (b)
- Go to 97

RECORD 81

BANKPNO (309A)

Q096 2
Per No

Use separate column for each account

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

BANKITNO (309B)

Ring Column No
Q096 3

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

(a) Do you have

BACCTYPE (309C)

a current account? →
a bank budget account? →
Q096A

1	1	1	1
2	2	2	2

Ask (b) for each account

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

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

BANKSERC (310)

Yes →
No →
Q096 B 1

1	1	1	1
2	2	2	2

Ask (i) & (ii)
Go to 97

(i) How much did you pay excluding interest, in the last 12 months, that is since
Include all accounts

BANSCAMT (312)

Q096 B 2

£	p	£	p	£	p	£	p

Ask (ii)

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

BSCBUSP (313)

Yes →
No →
Q096 B 3

1	1	1	1
2	2	2	2

Ask (ai)
Go to 97

(ai) About what proportion would be for business?

BSCBUSPR (315)

Q096 B 4 %

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

Ask 97



To all households

As all spenders

RECORD 25

97 Do (any of) you pay for anything by means of a standing order or direct debit through a bank, bank budget account, National (Post Office) Giro or building society?

Exclude credit transfers

BANKSTOR (316)

Yes 1
No 0097 1

1
2

Record detail - In grid below - Go to 98

RECORD 82

Per No	Ring Line No	Purpose (Automobile Association membership etc)	OFF USE			Enter period code	If code 9 specify period	£ p	
			4	5	6			7	
	1								
2	2 3								
0097	3 0097		0097	0097	0097		0097		
	4								
(316A)	5 (316B)		(318)	(318A)	(319)		(317)		
RPNO	6 RITN		RPUR	RQUA	317		RAMT		
6STO	7 6STO		6STO	6STO	PERC		6STO		
	8								
	9								
	10								

- Ask

To all households (Ask hoh or wife)

RECORD 25

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

PRES (319A)

Q098

Yes →

No →

1
2

- Ask (a) & (b)
- Go to 99

Exclude items acquired on prescription season tickets. RECORD 91

PRESPNO (319B)

(a) Who acquired the items? Q098A Per No

(b) How many items did they acquire? Q098B

Use separate column for each person receiving free items on prescription							

- Ask (b)

- Ask 99

RECORD 25

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

FREEWELF (321)

Q099

Yes →

No →

1
2

- Ask (a) & (b)
- Go to 100

RECORD 92

WELFPNO (321A)

(a) Who received the milk? Q099A Per No

(b) How many pints did they receive during the seven days ending yesterday? Q099B

Use separate column for each person receiving free welfare milk							

- Ask (b)

- Ask 100

RECORD 25

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

FRSCMILK (322A)

Yes →

No Q100 →

1
2

- Ask (a) & (b)
- See 101

RECORD 93

SCHMPNO (322B)

(a) Who received the milk? Q100A Per No of child

(b) How many pints did they receive during the seven days ending yesterday? Q100B

Use separate column for each person receiving free school milk							

- Ask (b)

- See 101

To all with children at state schools

DNA No state school children N - Go to 103

101 Have any of your children at state schools had any school meals during the past 7 days ending yesterday? RECORD 25

SCHMEALS (324)
 Yes 1 - Ask (a)-(c)
 No 2 - Go to 102

RECORD 94

(a) Which child? SMPERNO (324A)
Q101A Per No of child

Use separate column for each child receiving school meals

(b) How many meals has each child had? SMNOHDLW(324B)
Q101B

(c) Were the meals free? SMFREE (324C)
 Yes 1
 No 2
Q101C

(d) During the seven days ending yesterday did you pay for any of the meals? SMPAIDLW(328)
 Yes 1
 No 2
Q101D

(i) How much did you pay for each child during the seven days ending yesterday? SMDBAMT (329)
Q101D

(ii) How many meals did this cover? SMNOPDLW (330)
Q101D 2

Include school cafeteria and fixed priced meals
 Exclude school tuck shop

1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
£	p	£	p	£	p	£	p

- Ask (b)
 - Ask (c)
 - Go to 102
 - Ask (d)
 - Ask (i) & (ii)
 - Go to 102
 - Ask 102

102 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 25

SCHTRAV (331)
 Yes 1 - Ask (a)-(b)
 No 2 - Go to 103

RECORD 96

(a) Which child? SCTRPNO (331A)
Q102A Per No of child

Use separate column for each child travelling by bus or train

(b) Did he/she travel free? SCTRFREE (331B)
 Yes 1
 No 2
Q102B

(c) During the seven days ending yesterday did you actually pay for any of the travel? STPAIDLW(331C)
 Yes 1
 No 2
Q102C

(i) How much did you pay for each child during the seven days ending yesterday? STPAYM (333)
Q102 C 1

STDAYCOV (333A)

1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
£	p	£	p	£	p	£	p

- Ask (b)
 - Go to 103
 - Ask (c)
 Ask (i) & (ii)
 Go to 103

To all households

Ask all spenders

RECORD 25

103 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 ?

GRANTS (335)

Yes	1
No $\Phi 103$	2

- Ask (a) & (b)
- Go to 104A

Exclude parental contribution RECORD 83

Use separate column for each grant received

GRANTPNO (336)

$\Phi 103 A 1$

(a) Who is/was receiving the grant — Per No

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

- Ask (b)

GRITEMNO (336A)

$\Phi 103, 2$

Ring Column No

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

(b) Is/was the source of the grant

GRANTSOU (337) State?

$\Phi 103 B$

Private?

Overseas?

1	1	1	1
2	2	2	2
3	3	3	3

- Ask (c)
- Go to (d)

£ p £ p £ p £ p

GRAVEXFE (338)

$\Phi 103 C$

(c) What is/was the current annual value of the grant excluding fees?

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

- Go to (e)

or

GRAVINCF (339)

$\Phi 103 D$

(d) What is/was the current annual value of the grant including fees?

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

- Ask (e)

(e) Are you (or your children) still receiving the grant or scholarship?

GRANTSRE (340)

$\Phi 103 E$

Yes

No

1	1	1	1
2	2	2	2

- Ask (f)-(h)
- Go to 104A

GRANTDIR (341)

$\Phi 103 F$

(f) How much of this was/is being/will be paid direct to you (or your children) by cash or cheque?

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

- Ask (g)

(g) Is the grant for attendance at a state or private establishment?

ESTTYPE (342)

$\Phi 103 G$

State?

Private?

1	1	1	1
2	2	2	2

- Ask (h)

(h) Is the course you (or your children) are attending

CORTYPE (343)

Up to and including 'A' level

Above 'A' level $\Phi 103 H$

DK

1	1	1	1
2	2	2	2
3	3	3	3

- Go to 104A
- Ask (i)

(i) What is the name of the examination you (or your children) will take?

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

- Ask 104A

To all households

Ask all spenders

RECORD 25

104A In the last 12 months that is since you paid any fees or maintenance for any educational courses at any level but excluding leisure classes?

EDUCFEES (344)

Yes → 1
No → 2

Q104 A 1

- Ask (a)-(e)
- Go to 104B

Include parental contribution RECORD 97

EDUCPNO (344A)

Q104 A 2

(a) Who is/was attending the course? → Per No

Use separate column for each course

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

- Ask (b)

EDUCITNO (344B)

Ring Column No
Q104 A 3

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

(b) What was the annual amount paid? →

EDUCFANT (345)
Q104 A 4

£	p	£	p	£	p	£	p

- Ask (c)

(c) Is/was the course at a state or private establishment? →

EDCESTY (346)
Q104 A 5

State? →
Private? →

1	1	1	1
2	2	2	2

- Ask (d)

(d) Is/was the course you (or your children) are/were attending Up to and including 'A' level? →
Above 'A' level? →
DK? →

EDUCCOTY (346A)
Q104 A 6

1	1	1	1
2	2	2	2
3	3	3	3

- Go to (e)
- Ask (l)

(l) What is the name of the examination you (or your children) will take? →

(e) Are you (or your children) currently attending the course? →

EDUCSTAT (346B)
Q104 A 7

Yes →
No →

1	1	1	1
2	2	2	2

- Ask 104B

To all households

Ask all spenders

RECORD 25

104B In the last 12 months, that is since have (any of) you paid any fees for any (other) course or private tuition such as nursery school, play school, driving, swimming, music, riding lessons, weekend or evening courses or other leisure classes?

Exclude membership fees, RECORD 98 playgroup, day nursery

LEISCFEE (347)

Yes No Q104 B 1

1 2

- Ask (a)-(e) - Go to 105

LEISCPNO (347A) (a) Who is/was attending the course? Q104 B 2 Per No

Use separate column for each course

- Ask (b)

LEISCITN (347B) Ring Column No Q104 B 3

1 2 3 4

LEISCITN (347) (b) What is the total amount paid in the last 12 months? Q104 B 4

£ p £ p £ p £ p

- Ask (c)

LEISCEST (349) (c) Is/was the course At a state establishment? At a private establishment? or an individual giving private tuition? Q104 B 5

1 1 1 1 2 2 2 2 3 3 3 3

- Ask (d)

(d) What is the subject being studied?

- Ask (e)

LEISCSAT (349A) (e) Are you (or your children) currently attending the course? Q104 B 6 Yes No

1 1 1 1 2 2 2 2

- Ask 105

To all households

Ask all spenders

RECORD 25

105 (In addition to the courses you have told me about) are (any of) you at present attending any part-time courses at a state educational establishment for which you do not pay fees?

PTCOURSE (349B)

Yes →
No Q105 →

1
2

- Ask (a) &
- See 106

RECORD 99

(a) Who is attending the course?

PTPERNO(349C)

Q105 A 1

Per No

PTITEMNO(349D)

Ring Column No

Q105 A 2

Use separate column for each spender attending							

- Ask (b)

(b) Is the course

PTTYPE (349E)

Up to and including 'A' level →

Above 'A' level Q105 B →

DK? →

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

1	1	1	1
2	2	2	2
3	3	3	3

- See 106

- Ask (i)

(i) What is the name of the examination you will take?

--	--	--	--

- See 106

Check front page of Household Schedule

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 →

N

- Go to 107

108 Is the course you (or your children) are attending part of the technical and vocational educational initiative?

TVEIPNO (349F)

Q106 1

Per No

Use separate column for each child							

TVEI (349H)

Q106 2

Yes →

No →

DK →

1	1	1	1
2	2	2	2
3	3	3	3

- Ask 107

Ask all spenders

Educational income and expenditure for non household members

107 Have you a child aged 16 to 24 outside this household who is currently receiving full or part-time education?

RECORD 25

OUTGRANT (350)

Yes
No Q107

1
2

- Ask (a)-(f)
- Go to 112

RECORD 28

Include married children aged 16-24

OSPERNO (351)

(a) Ring person number Q107 A

Use separate column for each child			
31	32	33	34

(b) Enter relationship to HOH

--	--	--	--

OSPERNO (351)
Q107 C

				OFF USE
--	--	--	--	---------

(c) Sex

OSPERSEX (352)
Q107 C
Male
Female

1	1	1	1
2	2	2	2

- Ask (d)

(d) Age now

OSPERAGE (353)
Q107 D

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

- Ask (e)

(e) Full or part-time education
Q107 E
Full time
Part time
DK

OSPEREST (354)

1	1	1	1
2	2	2	2
3	3	3	3

- Ask (f)

(f) Enter person number of parent/guardian giving details at (a)-(e)
Q107 F

OSPARENT (356)

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

- Ask 108

108 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?
Q108 A
Yes
No

OSEDC FEE (364)

1	1	1	1
2	2	2	2

- Ask (i) & (ii)
- Go to 109

(i) What was the annual amount paid?

OSEDFAMT (365)
Q108 A1

£	p	£	p	£	p	£	p

- Ask (ii)

(ii) Was the course at a state or private establishment?
Q108 2
State
Private

OSEDESTT (366)

1	1	1	1
2	2	2	2

- Ask 109

Use separate column for each child

31	32	33	34
----	----	----	----

Per No →

109 Has your child received any education grants, maintenance grants or scholarships during the last 12 months, that is since **OSGRANTR (357)** [?] Yes →
Exclude parental contribution **Q109** No →

1	1	1	1
2	2	2	2

- Ask (a) & (b)
- Go to 112

(a) Is your child still receiving the grant or scholarship? **OSGSREC (358)** **Q109 A** Yes →
No →

1	1	1	1
2	2	2	2

Ask (b)

(b) Is/was the source of the grant **OSOURCE (359)** **Q109 B**

State? →
Private? →
Overseas? →

1	1	1	1
2	2	2	2
3	3	3	3

- Ask (c)
- Go to (d)

(c) What is/was the current annual value of the grant excluding fees? **OGEXFEE (360)** **Q109 C**

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

- Go to 110

or

(d) What was the current annual value of the grant including fees? **OGINCFEE (361)** **Q109 D**

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

- Ask 110

110 Is your child attending a

Running Prompt

OSESTYP (362) University →
another state establishment →
or private establishment? →
Q110

1	1	1	1
2	2	2	2
3	3	3	3

Ask 111

111 Is the course

OSCOR TYP (363) up to and including 'A' level →
or above 'A' level? **Q111** →
DK →

1	1	1	1
2	2	2	2
3	3	3	3

- Go to 112
- Ask (a)

(a) What is the name of the examination your child will take?

--	--	--	--

- Ask 112

To all households

Ask all spenders

RECORD 25

112 Have (any of) you been an employee at any time during the last 13 weeks?

Refer informant to Prompt Card C

EMP J3W (3636)

Yes →
No → Q112

1
2

- Ask (a)
- Go to 113

(a) Do you have (have you had) any of these items refunded by your employer (main or subsidiary)?

BUS REF (363A)

Yes →
No to all → Q112 A 1

1
2

- Ask (I)-(II)
- Go to 113

(I) How much of the expenditure did you have refunded?

(II) How long did this cover?

RECORD 103

Prompt amounts entered at relevant questions	Yes	No	Par 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 A2	X	A3		A4		A5	
Insurance on structure (42 or 43)	5 Q112	X	Q112		Q112		Q112	
Gas (61-70)	6	X						
Electricity (51-60)	7 (435)	X	(435A)		(436)		(437)	
Telephone (47)	8	X	NO		MT			
	8	X	PER		RAMT		C436	
Road fund tax (71(b) and 73(b))	9 BUS EXPEN	X	BUS PER		BUS RAMT		PER C436	
	9	X						
Vehicle insurance (71(e) and 73(e))	10	X						
	10	X						
Vehicle purchase (74 and 79-85)	11	X						

To all households

Ask all spenders

Refer Informant to Prompt Card D

113 Did anyone from outside the household give you the money to pay for any of the household expenditure you have mentioned?
RECORD 25
RECORD 101

EXP GIVN (589A)
 Yes 1 → 1
 No Q113 1 → 2
 - Ask (a)-(d)
 - Go to 114

EXP GVPNO (589B)
Q113 2
 Per No
 EXP GVITN (589C)
 Ring Column No
Q113 3

Use separate column for each item of expenditure

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

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

(a) What was (were) the item(s) of expenditure?
 (b) Who gave you the money for the ?

- Ask (b)
 - Ask (c)

£ p £ p £ p £ p

(c) How much was the amount gave you? Q113 C

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

- Ask (d)

(d) How long did this cover? Enter Q113 D period code

If code 9, specify period
 - Ask 114

114 Were any of the items of household expenditure which you mentioned paid direct by someone else outside the household?
 Exclude direct payment of bills by supplementary agent or employer

RECORD 102

RECORD 25

EXP GDIR (591A)
 Yes 1 → 1
 No Q114 1 → 2
 - Ask (a)-(d)
 - Go to 115

EXP GDIRPN (591B)
Q114 2
 Per No
 EXP GDIRIN (591C)
 Ring Column No
Q114 3

Use separate column for each item of expenditure

1	2	3	4				

(a) What was (were) the items of expenditure?
 (b) Who paid for the ?

- Ask (b)
 - Ask (c)

£ p £ p £ p £ p

(c) How much was the amount paid? Q114 C

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

- Ask (d)

(d) How long did this cover? Enter Q114 D period code

If code 9, specify period
 - See 115

The information on this page should be obtained from local authority office and entered below

	£	p
115 Gross Value of rateable unit(s) covering the household GRV (372) Q115		00
116 Net Rateable Value of rateable unit(s) covering the household NRV (373) Q116		00

117 Copy from valuation lists

Description (Flat, Shop with flat, house with garage etc)	Location in building

See 118

For all households containing men aged 65 and over and women aged 60 and over

DNA →

N

- See 118 and go to next document

118 What concessionary bus travel provisions are provided for OAP's -

Free bus pass or permit	1	} Go to (b)	
Half fare bus pass or permit	2		
Flat fare bus pass or permit	3		
Bus tokens or bus tickets	4		- Ask (a)
Any other type of concessionary OAP bus pass? Specify	5		- Go to (b)
No concessionary bus travel provision in area	6	- See 119 and go to next document	

INA129 (374)
Q118

(a) Annual value of tokens/tickets → CONBUSAM (375) Q118 A

£	p

- Ask (b)

(b) Are passes and permits charged for? → CBUSCH (375A) Q118 B

Yes	1	- Ask (i) & (ii)
No	2	- See 119 and go to next document

(i) How much is charged? → CBUSCHAM (375B) Q118 B1

£	p

(ii) Period covered by charge? → PERC375B (375C) Q118 B2. Enter Period code

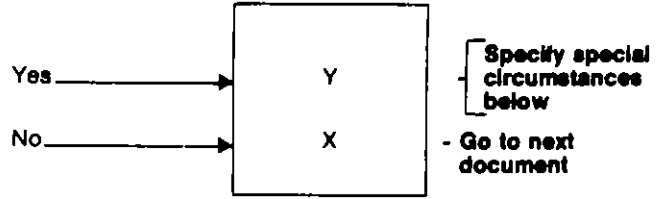
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If code 9, specify period

See 119 and go to next document

To all households at end of record-keeping period (Ask hoh or wife)

119 Were there any special circumstances, such as visitors staying with you or temporary absences of members of your household during the past two weeks?



Specify special circumstances

PERIOD CODES.-	
[ENTER AS SINGLE DIGIT]	
WEEK	1
TWO WEEKS	2
THREE WEEKS	3
FOUR WEEKS	4
CAL. MONTH	5
THREE MONTHS	6
SIX MONTHS	7
YEAR	8
OTHER PERIOD	9

MASTER SCHEDULE

S.837B

IN CONFIDENCE

RECORD 56

Family Expenditure Survey.

Income Schedule

If the spenders have been seen separately, check that the spenders have been asked these questions on 8837A
43-46, 48,
71-97, 101-114

Office Use			
CI			
Interviewer Use			
Area	Ser	Hld	HHNUMB (384)
		0	0000 5
Ref No			B
AREANUMB (382)	SEANUMB (383)		1987
0000 3	0000 4		

To all

1 Are you doing any kind of paid work at present?

Include person absent due to holidays, strikes, sickness, injury, or temporarily laid off, as long as they have a job to return to
Include student 16 or over if working at present

Yes →
No →

Per No	Per No	Per No
PERSNOB (385)		0000 6

Y	Y	Y
X	X	X

- Ask (a)
- Go to (b)

(a) Are you

Working

an employee* (inc CP/ACE,†)
self employed** or employer

1	1	1
2	2	2
INA 201	(386)	0001
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7

Go to 2

(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,‡)
Out of employment because of sickness or injury but intending to seek or about to start work

Not Working

Sick or injured, but not intending to seek work
Retired*** (incl Job Release Scheme)
None of these

Go to 4

- See 6
- Go to 5
- See 6

*Employee (code 1) includes all working regularly for an employer irrespective of hours worked per week (include short time working), directors of limited companies

†Receiving a wage
CP = Community Programme (Great Britain)
ACE = Action for Community Employment (N Ireland)

**Self employed (code 2) includes all working regularly irrespective of number of hours worked per week, also include childminders

‡Receiving an allowance
TOPS = Training Opportunity Scheme (Great Britain)
ATS = Attachment Training Scheme (N Ireland)
YTS = Youth Training Scheme (GB)
YTP = Youth Training Programme (N Ireland)

Exclude mail order agents and baby sitters

***Retired (code 6) include those who have retired at or before the normal age for their occupation and who are not receiving unemployment pay or who would not take a job if one was offered to them

Interviewer: see page 80 for period codes

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 _____ ?

WKS	WEMP	(387)		0002	
-----	------	-------	--	------	--

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 to work today?

Probe to find out whether day of interview is a normal working day - If normal working day and away from work, code 2

Yes →
No →

ATWORK (388A)		0003	
1	1	1	1
2	2	2	2

- Go to 9
- Ask (a)

(a) Have you been away from work for more than the last 3 working days?

Yes →
No →

AWLS 3 DAY (389)		0003A	
1	1	1	1
2	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? Specify _____

INA207 (390)		0003A1	
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4

Ask (II)
Specify below and ask (II)

(II) Are you receiving

Running prompt full pay from your employer? _____
part pay, or made up pay _____
no pay? _____

INA209 (391)		0003A2	
1	1	1	1
2	2	2	2
3	3	3	3

Ask (III)

(III) How many weeks in all have you been away from work during this spell of absence?

NOWKSAW (392)		0003A3	

Go to 9

If less than one week, give days

Per No		Per No		Per No	

To all unemployed intending to work (coded 3 or 4 at 1(b))

Exclude those who have not worked before but who are seeking work e.g. school, college or university leavers

DNA. Others

£	p	£	p	£	p
N		N		N	
X		X		X	

- Go to 9

- Go to 45

4 When did you last do any regular paid work?

Enter month and year as two digit numbers

Month

Year 19

DATLST		WK (393A)		Q 004	

If a year or more before interview, go to 9
If less than a year, ask (a)

(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

WKS WUN		EM (394)		Q 004A	
---------	--	----------	--	--------	--

- Go to 9

To all retired (coded 6 at 1(b))

5 Have you retired in the last 12 months, that is since ?

Yes
No

RETL12M (394A)		Q 005	
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)		Q 005 A	
---------------	--	---------	--

- Go to 45

To men aged under 65 and women aged under 60 who are coded 5 or 7 at 1(b)

DNA. Men 65 and over & Women 60 and over

INA 217 (397)		Q 006	
N	N	N	

- Go to 45

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?

Yes
No

INA 221 (398)		Q 007	
1	1	1	
2	2	2	

- Ask (a)

- Go to 8

(a) Could you tell me why you are permanently unable to work?

To men aged under 65 and women aged under 60 who are coded 5 or 7 at 1(b)(cont'd)

8 Have you done any regular paid work during the last 12 months, that is since ?

Yes
No

Per No		Per No		Per No	
ε	p	ε	p	ε	p
REGW		ORK (399)		0008	
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

REG		WKS (399A)		0008A	
-----	--	------------	--	-------	--

- Ask (b)

(b) What wage/salary did you usually receive each time you were paid after all deductions?

REG		PAY (400)		0008 B	
-----	--	-----------	--	--------	--

- Ask (c)

(c) How often were you usually paid?

Enter period code

PERC		400 (401)		0008 C	
------	--	-----------	--	--------	--

If code 9, specify period.

Go to 45

To all employees (coded 1 at 1(a))
self employed (coded 2 at 1(a))
unemployed (coded 3 or 4 at 1(b))

DNA Codes 5, 6, or 7 at 1(b)

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

- 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) on page 5

Enter details at on page 5 and (3) on page 6

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 unemployed and intending to work (coded 3 or 4 at 1(b)) give details of last job and pay at 10, 38 etc

Question 8 (continued)

(a) Details of most remunerative job
(Interviewer to code occupation)

Exclude mail order agents and baby sitters

Per No

Job Title OCCUP (402)

Work Done Q009 A 1

Per No		Per No		Per No	

CODE OCCUPATION		

Code employment status below

What does the firm/organisation actually make or do?

INA276 (404)

Q009 A 2

Employment status

If director, ring code →

Employee →

Self employed →

1
1
2

Ask (I)
Go to (II)

Per No

Job Title

Work Done

WORKSTAT (405)
Q009 A 3

CODE OCCUPATION		

Code employment status below

What does the firm/organisation actually make or do?

If director, ring code →

Employee →

Self employed →

1
1
2

Ask (I)
Go to (II)

Per No

Job Title

Work Done

CODE OCCUPATION		

Code employment status below

What does the firm/organisation actually make or do?

If director, ring code →

Employee →

Self employed →

1
1
2

Ask (I)
Go to (II)

If employee

(I) Are you a

SUPERVIS (405A)

Q009 A 4

Manager →

Foreman/supervisor →

Other employee? →

1	1	1
2	2	2
3	3	3

Ask (I)(a)

(I) (a) How many employees work in the establishment?

SIZEEST (405B)

Q009 A 5

1 or 2 →

3-24 →

25-99 →

100-999 →

1000 or more →

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

See (b)

If self-employed

(II) Do/did you employ any other people?

SEEMPLOY (405c)

Yes 1-24 employees →

25 or more →

1	1	1
2	2	2

See (b)

Question 9 (cont'd)

Per No		Per No		Per No	

(b) Details of subsidiary job (occupation need not be coded here)

DNA →

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

See 10 or 38

Exclude mail order agents and baby sitters

Per No
Job Title
Work Done

Code employment status below

What does the firm/organisation actually make or do?

INA277 (406)
Q009 B1
Employment status
SUBWKSTA(407)
Q009 B2

If director, ring code →

1
1
2

Employee →

Self employed →

See 10 or 38

Per No
Job Title
Work Done

Code employment status below

What does the firm/organisation actually make or do?

Employment status

If director ring code →

1
1
2

Employee →

Self employed →

See 10 or 38

Per No
Job Title
Work Done

Code employment status below

What does the firm/organisation actually make or do?

Employment status

If director ring code →

1
1

Employee →

See 10

To all employees (coded 1 at 1(a)) or all unemployed (coded 3 or 4 at 1(b))

Per No		Per No		Per No	

Most remunerative job as employee (see 9(a))

DNA, Coded 2, 5-7 at 1 →

£	p	£	p	£	p
N		N		N	

- See 38

10 On what date were you last paid a wage or salary?

Enter day, month & year as two digit numbers
 PAYDAT (408)
 Q010

Day
 Month
 Year 19

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 anticipated pay

If details of anticipated pay given, ring code

ANTICPAY (408A)
 Q010 2

1	1	1
---	---	---

Ask 11

11 What was your wage/salary, including overtime, bonus, commission or tips, after all deductions, the last time you were paid?

PAYAMT (409)
 Q011

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

Ask 12

12 How long did your last wage or salary cover?

PERC409 (410)
 Q012

Enter period code

If code 9, specify period

13 Did this include a refund of income tax?

TAXREF (411)
 Q013

Yes →
 No →

1	1	1
2	2	2

Ask 13

- Ask (a)
 - Go to 14

(a) How much was it?

TAXREFAM (411A)
 Q013 A

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

- Ask 14

14 How much was deducted for income tax under PAYE?

TAX (412)
 Q014
 NOTAX (412A)
 Q014 1
 No tax deducted →

1	1	1			

If no tax deducted code "1" below, then ask (a), others go to 15

(a) Do you usually pay any tax?

TAXUSUAL (413)
 Q014 A
 Yes →
 No →

1	1	1
2	2	2

Specify below why tax not paid
 - Ask 15

15 How much was deducted as National Insurance contribution?

NINO (414)
 Q015
 NONINO (414A)
 Q015 1
 No NI deductions →

1	1	1			

If no NI deducted code "1" below, then ask (a), others go to 15

(a) Do you usually pay National Insurance contributions?

NIUSUAL (414B)
 Q015 A
 Yes →
 No →

1	1	1
2	2	2

Ask 15

Most remunerative job (continued)

18 Were there any other deductions from your wages/salary such as superannuation, union fees, Friendly Society, sports clubs, specialised pastimes or charities?

DEDUCTS(414c) Yes
Q016 No

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

Record details below
Go to 18(a)

Superannuation DEDSUP(415A)
Q016 1
DEDSUPAM(415B)
Q016 2

Ring code and enter amount

1		1		1	

Union fees DEDUF(415C)
Q016 3
DEDUFAMT(415D)
Q016 4

Ring code and enter amount

2		2		2	

Friendly societies DEDFS(415E)
Q016 5
DEDFSAMT(415F)
Q016 6

Ring code and enter amount

3		3		3	

Sports clubs and specialised pastimes DEDSC(415G)
Q016 7
DEDSAMT(415H)
Q016 8

Ring code and enter amount

4		4		4	

Charities DEDCH(415I)
Q016 9
DEDCHAMT(415J)
Q016 10

Ring code and enter amount

5		5		5	

Other deductions DEDOTH(416A)
Q016 11

Ring code

6		6		6	
---	--	---	--	---	--

Specify below and enter amounts

Per No	Purpose of deduction
	DEDONEAM(416B) Q016 12
	DEDONETY(416C) Q016 13
	DEDONEQU(416D) Q016 14
	DEDTWOAM(416E) Q016 15
	DEDTWOTY(416F) Q016 16
	DEDTWOQU(416G) Q016 17
	DEDTHRAM(416H) Q016 18
	DEDTHRTY(416I) Q016 19
	DEDTHRQU(416J) Q016 20

							OFF USE
							OFF USE
							OFF USE
							OFF USE
							OFF USE
							OFF USE

See 18(a)

Most remunerative job as employee (continued)

Q.16 (cont'd)

Per No		Per No		Per No	

(a) Interviewer to code

Was the pay slip for the date shown at 10

INA235 (417)
Q016 A

consulted by interviewer →
consulted by informant →
other pay slip consulted →
pay slip not consulted? →

£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	
4		4		4	

Ask (I)
- See 17

GROSSPAY (418) Q016 A 1

(I) What was the gross wage/salary including superannuation as shown on payslip? →

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

- See 17

To all currently employed or those who have been unemployed for 13 weeks or less (see Q 4)

DNA If unemployed for more than 13 weeks →

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

Go to 21

17 Was any mileage allowance or fixed allowance for motoring included in the net pay of £ (see 11) that you received on (see 10)?

MALLREC (418A)
Yes →
No Q017 →

1	1	1
2	2	2

Ask (a)
Go to 18

MALINPAY (418B)
Q017 A

(a) How much was included →

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

Ask 18

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)
Yes →
No Q018 →

1	1	1
2	2	2

Ask (a)
Go to 19

OTHMOTRE 442
Q018 1

(a) How much was included →

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

Ask 19

Most remunerative job as employee (continued)

Refer Informant to Prompt Card E

19 Were there any refunds of household expenditure shown on Card E by your current (last) employer included in the net pay of £ (see 11) HHEXPINC(442A) you received on (see 10)?

Yes _____
No Q019 1

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

Specify below and enter amounts
Go to 20

Per No	Describe fully what was covered by refund	
	BUSERINI (439B) Q019 2	
	BUSERIN2 (439C) Q019 3	

Ask 20

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) OTHBUINC (439A) you received on (see 10)?

Yes _____
No Q020 1

1		1		1	
2		2		2	

Specify below and enter amounts
Ask 21

Per No	Describe fully what was covered by refund	
	OTHBUSE1 (443A) Q020 2	
	OTHBUSE2 (443B) Q020 3	

Ask 21

To all employees (coded 1 at 1(a)) & all unemployed (coded 3 or 4 at 1(b))

INA220(419)

21 How many hours a week do you usually work excluding meal breaks and all overtime? Q021

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

Ask 22

INA244(420)

22 On average how many hours (if any) paid overtime do you usually work in a week? Q022

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

Ask 23

Most remunerative job as employee (continued)

Refer informant to Prompt Card F

23 Was your last wage or salary affected by any of the items shown on Card F?

PAYAFFL (420A)
Q023

Yes _____
No to all _____

Per No		Per No		Per No	

£	p	£	p	£	p
1		1		1	
2		2		2	

- Code at (a)
- Go to 24

£	p	£	p	£	p
---	---	---	---	---	---

- (a)
- Pay included Statutory Sick Pay _____
 - 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 NI benefit received _____
 - Tax refund _____
 - Business refunds _____
 - Tax adjustment for previous unemployment benefit or supplementary benefit received _____
 - Other Specify _____

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	

Ask (b)

Specify below and ask 24

24 Your last wage/salary after all deductions was £ (see 11) Is this the amount you usually receive (when at work)?

INA 254 (426)
Q024

Yes _____
No _____

1		1		1	
2		2		2	

- Go to 25
- Ask (a)-(c)

(a) What do you usually receive each time you are paid after all deductions?

USNETPAY (427)
Q024 A

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

- Ask (b)

(b) What do you usually receive each time you are paid before all deductions?

USGROPAY (428)
Q024 B

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

- Ask (c)

(c) How often are you usually paid?

PERC 428 (429)
Q024 C

Enter period code

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

If code 9, specify period

- Ask 25

Most remunerative job as employee (cont'd)

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)

Yes
No Q025 1

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

Specify below and enter amounts

- See 27

Per No	DESCRIPTION
	BONUSAM1 (431A) Q025 2
	Was this amount before tax BOBATA1 (431D) after tax Q025 5 DK
	BONUSAM2 (431B) Q025 4
	Was this amount before tax BOBATA2 (431E) after tax Q025 5 DK
	BONUSAM3 (431C) Q025 6
	Was this amount before tax BOBATA3 (431F) after tax Q025 7 DK

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	
1		1		1	
2		2		2	
3		3		3	
1		1		1	
2		2		2	
3		3		3	

- See 26

To all receiving a bonus (coded 1 at 25) whose last pay was not usual (coded 2 at 24)

26 Did the usual net pay of £ (see 24(a)) include any of this bonus or commission?

BONUSPAY (432A)

Yes
No Q026

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)

- Go to 27

(a) How much was included?

BONINUSP (433)

Q026 A

Per No		Per No		Per No	
£	p	£	p	£	p

Ask 27

To all whose last pay was not usual (coded 2 at 24)

DNA Others

Per No		Per No		Per No	
£	p	£	p	£	p
N		N		N	

- See 28

27 Was any allowance for motoring included in your usual net pay of £ (see 24(a))?

MALLUSP (433A)

Yes
No Q027

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)

- See 28

(a) How much was included?

MALLINNP (441)

Q027 A

Per No		Per No		Per No	
£	p	£	p	£	p

See 28

Most remunerative job as employee (continued)

Per No		Per No		Per No	

To all currently employed or those who have been unemployed for 13 weeks or less (see Q 4)

DNA If unemployed for more than 13 weeks

£	p	£	p	£	p
N		N		N	

- 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)
Q028

Yes
No

1	1	1
2	2	2

- Ask (a)
- Go to 29

(a) What is the amount on which tax relief was/will be allowed?

TAXRELF (434)
Q028 A

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

Ask 29

29 Do/did you receive any luncheon vouchers from your current (last) employer?

LV (434A)
Yes
No Q029

1	1	1
2	2	2

- Ask (a)
- Go to 30

(a) Have you used any luncheon vouchers in the last 7 days?

LVUSED (434 B)
Yes
No Q029 A

1	1	1
2	2	2

- Ask (I)-(II)
- Go to 30

(I) How many have you used in the last 7 days?

LVNOS (444)
Q029 A1

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

- Ask (II)

(II) What was the value of each voucher used?

LVAL (445)
Q029 A2

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

- Ask 30

30 Have you received any free meals from your employer in the last 7 days?

FREEMEAL (445A)
Yes
No Q030

1	1	1
2	2	2

- Ask (a)
- Go to 31

(a) How many free meals have you received in the last 7 days?

EMPFREEM (446)
Q030 A

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

- Ask 31

Most remunerative job as employee (cont'd)

31 Has your employer supplied you with any free food e.g. milk, potatoes in the last 7 days?

EMPFREEF (447)

Yes
No Q031

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)
- See 32

(a) What was the free food supplied in the last 7 days, and how much was supplied?

EMPFMILK (448)

Q031 A 1
Milk (pints)

EMPFEGGS (449)

Q031 A 2
Eggs (dozens)

EMPFPOTS (450)

Q031 A 3
Potatoes (lbs)

EMPFOTH (451)
Q031 A 4

Other Specify

Food
Quantity

1		1		1	

Specify below and see 32

EMPFOVA1 (452A)

Q031 A 5

EMPFOVA 2

Q031 A 6

						OFF USE
						OFF USE

See 32

SUBSIDIARY EMPLOYEE SECTION

Ask all those with subsidiary employment as employee (see 9(b))

DNA - no subsidiary employment as employee

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

- See 38

32 On what date were you last paid a wage or salary?

SUBDAT (453)
Enter day, month & year as two digit numbers
Q032

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?

SUBSIDPY (454)

Q033

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

Ask 34

34 How long did this cover?

PERC 454 (455)

Q034 Enter period code

If code 9, specify period

Ask 35

Subsidiary employment as employee (cont'd)

35 Were any deductions made from your pay before you received it?

SUBSDEDS (455A) Q035 1

Yes

No

Per No		Per No		Per No	

£ p £ p £ p

1		1		1	
2		2		2	

Record details below and ask (a) See 38

SUBSTAX (456) Q035 2

income tax under P.A.Y.E.

Ring code and enter amount

1		1		1	

SUBTAXAM (456A) Q035 3

National Insurance contributions

SUBSNI (457) Q035 4

SUBNIAM (457A) Q035 5

Ring code and enter amount

2		2		2	

Other deductions
SUBSOTH (458) Q035 6

Code

3		3		3	
---	--	---	--	---	--

Specify below and enter amounts

Per No	Purpose of deduction
	SUBONEAM (458A) Q035 7
	SUBONETY (458B) Q035 8
	SUBONEQU (458C) Q035 9
	SUBTWOAM (458D) Q035 10
	SUBTWOY (458E) Q035 11
	SUBTWOQU (458F) Q035 12

					OFF USE
					OFF USE
					OFF USE
					OFF USE

(a) Interviewer to code

Was the pay slip for the date shown at 32 consulted by interviewer
SUBPAYSL (460) Q035 A
consulted by informant
other pay slip consulted
pay slip not consulted

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

Ask 36
Go to 37

If pay slip consulted, ask. SUBSGROS (461) Q036

36 What was your gross pay before all deductions, including superannuation?

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

Ask 37

37 Were any refunds of allowances for business expenditure from your current employer included in the net pay you received on (see 32)?
SUBBUSRE (461A) Q037 1
Yes
No

1		1		1	
2		2		2	

Specify below and enter amounts
See 38

Per No	Purpose of deduction
	SUBBUS1 (462A) Q037 2
	SUBBUS2 (462B) Q037 3

See 38

To all self employed (coded 2 at 1(a)) or unemployed (coded 3 or 4 at 1(b)) whose last job was as self-employed.

Per No		Per No		Per No	

DNA not self employed →

£	p	£	p	£	p
N		N		N	

- Go to 48

Exclude mail order agent or babysitter (see 64)

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, NI contributions or money drawn for your own use?

SEPROFIT(464)
Q038 1
Profit →

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

- Go to 41

SENILPRO (464A) Nil Profit
Q038 2 →

1		1		1	
---	--	---	--	---	--

SELOSS(470A) Q038 3
Loss →

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

Ask 39

Income covering less than a year is acceptable if business is newly established
SEPRLODK(470B) Q038 4
DK →

1		1		1	
---	--	---	--	---	--

SESUBINC (477)
Q038 5

						OFF USE
--	--	--	--	--	--	------------

To self employed answering Nil Profit, Loss or DK at 38

38 Do you draw sums of money or cheques regularly from the business for your own use?

SEREGS (477B)

Yes →
No → Q039

Per No		Per No		Per No	

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)
- Go to 40

(a) How much on average do you take out each week/month?
SEREGSUM (465) Q039 A 1

SERSUMDK (465A) Q039 A 2
DR →

1		1		1	

- Go to 40

(b) How often do you take out that amount?

PERC 465 (466)
Q039 B

Enter period code →

If code 9, specify period

(c) In addition to the amount you have just told me about, do you draw sums of money or cheques from your business for the payment of any domestic bills?

SEDOM (466A) Q039 C

Yes →
No →

1		1		1	
2		2		2	

- Ask (i)
- Go to (d)

(i) How much on average do you take out each week/month?
SEDOMBIL (467) Q039 C 1

SEDBILDK (467A) Q039 C 2 DK →

1		1		1	

- Go to 40

(ii) How often do you take out that amount?
PERC 467 (468)
Q039 C 3

Enter period code →

If code 9, specify period

(d) After deducting the amount you withdrew and other expenses, how much profit (or loss) before tax did your share of the business yield in the most recent 12 months for which you have figures?

SERESPR (468A) Profit →
Q039 D 1

SERESNPR (468B) Nil profit →
Q039 D 2

SERESLOS (468C) Loss →
Q039 D 3

SERESDK (468D) DK →
Q039 D 4

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

1		1		1	
---	--	---	--	---	--

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

1		1		1	
---	--	---	--	---	--

- Go to 42

- Ask 40

To self employed answering No at 39 or DK at 39(a), (c) or (d)

Per No		Per No		Per No	

40 What was the total turnover of the **SETURNOV (471)** business during the most recent 12 month period for which you have figures Q040 1

SETURN DK (471 A) DK
Q040 2

£	p	£	p	£	p
1		1		1	

- Ask 41
- Go to 42

To all giving profit at 38 or answering 40

41 Are you the sole owner of your business or are you in partnership with someone else?

SEPARTNR (474)
Q041

Sole owner →
In partnership →

1	1	1
2	2	2

- Go to 42
- Ask (a)

(a) Have your partner's shares been included in the net profit, loss or turnover you gave me? **SESHINC (474 A)**

Yes →
No Q041 A →

1	1	1
2	2	2

- Ask (f)
- Go to 42

SEPARTSH (475)

(f) How much was included? Q041 A 1

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

Ask 42

To all self employed

Per No		Per No		Per No	

42 Dates of most recent 12 months for which information is available

SESTADAT (472)

Q042 1
Beginning

Enter month and year as two digit number

Include periods of less than twelve months if business is newly established

SEENDDAT (473)

Q042 2 Ending

SEDATDK (473A)
Q042 3

DK

1	1	1
---	---	---

Ask 43

43 Apart from meal breaks do you usually work

SEHOURS (476) Q043

Running prompt

less than 24 hours a week
24 hours but less than 31 hours a week
31 hours or more?

1	1	1
2	2	2
3	3	3

Ask 44

If more than one self-employed job, give overall total hours

To all self employed except those who have been unemployed for 13 weeks or less (see Q 4)

Per No		Per No		Per No	

DNA if unemployed for more than 13 weeks →

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

- Go to 45

Refer Informant to Prompt Card G

44 Are there any items on Card G which you have claimed or will be claiming as a business expense for tax purposes?

SEBUSEXP(475) 0044

Yes →
No to all →

1	1	1
2	2	2

- Ask (a)
See bottom of next page re subsidiary employment

(a) What percentage have you claimed or will you be claiming?

Where 38 has been answered the percentages claimed in that year are preferable to future claims

Actual amounts of expenses refunded can be given if percentages cannot Record these below percentage boxes

SEBUSEX1 (478A)

0044 1

Vehicle expenses (71, 73, 74, 79-84)

Ring code and enter %

1	1	1

SEBEPCA1 (479A)

0044 2

SEBUSEX2 (478B)

Rent (18)

0044 3

SEBEPCA2 (479B) Ring code and enter %

0044 4

2	2	2

Relating to this accommodation only →

SEBUSEX3 (478C)

Mortgage payments (33 or 38) 0044 5

SEBEPCA3 (479C) Ring code and enter %

0044 6

3	3	3

SEBUSEX4 (478D)

Rates (24) 0044 7

SEBEPCA4 (479D) Ring code and enter %

0044 8

4	4	4

SEBUSEX5 (478E)

Water/sewerage rate (29) 0044 9

SEBEPCA5 (479E) Ring code and enter %

0044 10

5	5	5

Q.44(a) (cont'd)

Per No		Per No		Per No	

<p>Insurance on structure (42 or 43) SEBUSEX6 (478F) Ring code and enter % SEBEP A6 (479F) Ring code and enter %</p>	<p>0044 11</p>	6	6	6
<p>Gas (61-70) SEBUSEX7 (478G) Ring code and enter % SEBEP A7 (479G) Ring code and enter %</p>	<p>0044 13</p>	7	7	7
<p>Electricity (51-60) SEBUSEX8 (478H) Ring code and enter % SEBEP A8 (479H) Ring code and enter %</p>	<p>0044 15</p>	8	8	8
<p>Telephone (47) SEBUSEX9 (479I) Ring code and enter % SEBEP A9 (479I) Ring code and enter %</p>	<p>0044 17</p>	9	9	9
<p>Anything else Specify SEBUSEX10 (478J) Ring code and enter % SEBEP A10 (479J) Ring code and enter %</p>	<p>0044 19</p>	10	10	10

Relating to this accommodation only

Specify below and see instructions below

If has subsidiary job as employee (see 9(b)), go back to 32.

If has subsidiary job as self-employed (see 9(b)), ask 38-42 and 43-44 and record answers in left hand margin

To all

Refer Informant to Prompt Card H

45 Are you at present receiving any of the state benefits shown on Card H?
BENCARDH (480A)
Q045

Exclude Supplementary benefit from (a) & (b)
Exclude Christmas bonus from (a) & (b)

Per No		Per No		Per No	

£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a) & (b)
- Go to 46

(a) Child benefit CHILDBEN (484A)
Include one parent benefit Q045A

Yes
No

1	1	1
2	2	2

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

(I) What was the amount of benefit you last received?
CHILDBAM (485)
Q045 A 1

--	--	--	--

- Ask (II)

(II) How long did this cover?
PERC485 (486)
Q045 A 2

Enter period code

If code 9, specify period

(b) NI retirement pension NIPEN (487)
Old person's pension Q045 B
Include additional pension

Yes
Yes
No to both

1	1	1
2	2	2
3	3	3

- Ask (I) & (II)
- Go to 46

Enter Attendance Allowance at 46(e) NIPANAMT (488)
Enter Job Release Allowance at 52(c) Q045 B 1

(I) What was the amount of benefit you last received?

--	--	--	--

- Ask (II)

(II) How long did this cover?
PERC488 (489)
Q045 B 2

Enter period code

If code 9, specify period

See (III)

INTERVIEWER CHECK
Is informant consulting a payment book or other document?

NIPN PYBK (489A)
Yes
No Q045 B 3

1	1	1
2	2	2

- Ask (III) & (IV)
- Go to 46

(III) What documents are being consulted?

NIPNTYBK (489B)
Q045 B 4

Buff book only
Yellow book only
Yellow and buff book
Other Specify

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

- Go to 46
- Ask (IV)
- Specify below and ask (IV)

(IV) What amounts are shown on documents for

NIPNAPAM (489C)
Q045 B 5
Additional pension (coded J)

NIPNMPAM (489D)
Guaranteed minimum pension (coded K) Q045 B 6

NIPNAPIN (489E)
Additional pension increments (coded M) Q045 B 7

Running Prompt

NIPNMPIN (489F)

Uprating of guaranteed

To all

Refer informant to Prompt Card I

46 Are you at present receiving any of the state benefits shown on Card I?

Exclude Supplementary benefit from (a)-(e)
Exclude Christmas bonus from (a)-(e)

BENCARDI (489G)

Yes Q046

No to all

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a) - (e)
- Go to 47

(a) NI Widow's benefits
(Include earnings-related supplement)
Enter War Widow's benefit at 52(c)

NIWIDOWS (489H)

Yes

No Q046 A

1		1		1	
2		2		2	

- Ask (i) & (ii)
- Go to (b)

(i) What was the amount of benefit you last received?

NIWIDAMT (490)

Q046 A 1

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

Ask (ii)

(ii) How long did this cover?

PERC 490 (491)

Q046 A 2

Enter period code

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

If code 9, specify period

INTERVIEWER CHECK
Is informant consulting a payment book or other document?

NIWDPYBK (491A)

Yes

No Q046 A 3

1		1		1	
2		2		2	

- Ask (iii) - (iv)
- Go to (b)

(iii) What documents are being consulted?

NIWDTYBK (491B)
Q046 A 4

Buff book only
Yellow book only
Yellow and buff book
Other specify

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

- Go to (b)
- Ask (iv)
- Specify below and ask (iv)

(iv) What amounts are shown on documents for

Running Prompt

Additional pension (coded J)

NIWDMPAM (491D)

Guaranteed minimum pension (coded K)

NIWDAPIN (491E)

Additional pension increments (coded M)

NIWDMPIN (491F)
Q046 A 8

Uprating of guaranteed minimum pension increments (coded N)?

Ask (b)

(b) War disability pension and related State allowance

WARDIS (491G)

Yes

No Q046 B

1		1		1	
2		2		2	

- Ask (i) & (ii)
- Go to (c)

(i) What was the amount of benefit you last received?

WARDISAM (492)

Q046 B 1

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

Ask (ii)

(ii) How long did this cover?

PERC 492 (493)

Q046 B 2

Enter period code

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

If code 9, specify period

Ask (c).

To all

Q 46 (cont'd)

Per No		Per No		Per No	

(c) Mobility allowance

MOBILITY (493A)

Yes
No 0046 C

£	p	£	p	£	p
1		1		1	
2		2		2	

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

(I) What was the amount of benefit you last received?

MOBLAMT (494)

0046 C 1

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

- Ask (II)

(II) How long did this cover?

PERC 494 (495)

0046 C 2 Enter period code

If code 9, specify period

(d) Severe disablement allowance

SEVDISAL (495A)

Yes
No 0046 D

1		1		1	
2		2		2	

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

(I) What was the amount of benefit you last received?

SEVDAMT (495B)

0046 D 1

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

- Ask (II)

(II) How long did this cover?

PERC 495B (495C)

0046 D 2 Enter period code

If code 9, specify period

(e) Attendance allowance

ATTENDNC (498A)

Yes
No 0046 E

1		1		1	
2		2		2	

- Ask (I) & (II)
- Go to 47

(I) What was the amount of benefit you last received?

ATTENDAM (499)

0046 E 1

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

- Ask (II)

(II) How long did this cover?

PERC 499 (500)

0046 E 2 Enter period code

If code 9, specify period

To all

Refer Informant to Prompt Card J

47 In the last 12 months, that is since you have received any of the state benefits shown on Card J? **BENCARDJ (500F)**
Q047

Yes →
 No to all →

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a) - (c)
 - Go to 49

Exclude Supplementary benefit from (a) to (c)
 Exclude Christmas bonus from (b) to (c)

(a) Statutory Sick Pay from your employer?

SSP (500G)
 Yes →
 No **Q047 A** →

1		1		1	
2		2		2	

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

(i) For how many weeks did you receive Statutory Sick Pay? **INA278 (501)**
Q047 A 1

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

- Ask (II)

(ii) Are you receiving Statutory Sick Pay at present?

INA279 (503)
 Yes →
 No **Q047 A 2** →

1		1		1	
2		2		2	

- Ask (b)

(b) NI sickness benefit

NISICK (504)
 Yes →
 No **Q047 B** →

1		1		1	
2		2		2	

- Ask (I)-(IV)
 - Go to (c)

(i) For how many weeks did you receive this benefit? **INA224 (505)**
Q047 B 1

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

- Ask (II)

(ii) What was the amount of benefit you last received? **NI BEN (506)**
Q047 B 2

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

- Ask (III)

(iii) How long did this cover? **PERC 506 (507)**
Q047 B 3
 Enter period code →

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

If code 9, specify period

(iv) Are you receiving benefit at present?

INA225 (508)
 Yes →
 No **Q047 B 4** →

1		1		1	
2		2		2	

- Ask (c)

Q 47 (cont'd)

		Per No		Per No		Per No		
		£	p	£	p	£	p	
(c) Contributory invalidity pension (Include invalidity allowance and additional pension)	CONFEN (509)	1	2	1	2	1	2	- Ask (i)-(iv) - Go to 48
	Yes _____ No <u>Q047 C</u>							
(i) For how many weeks did you receive this benefit?	INA258 (510) Q047 C 1							- Ask (ii)
(ii) What was the amount of benefit you last received?	CONBREC (511) Q047 C 2							- Ask (iii)
(iii) How long did this cover?	PERC 511 (512) Q047 C 3	Enter period code						If code 9, specify period
(iv) Are you receiving benefit at present?	INA259 (513)	1	2	1	2	1	2	- Ask 48
	Yes _____ No <u>Q047 C 4</u>							
To those coded Yes (coded 1) at 47								
	Others DNA	N		N		N		- See 49
48 Are/were you getting "made up pay" from your employer in addition to the Statutory Sick Pay, NI Sickness Benefit or Contributory Invalidity Benefit you are/were receiving?	PAIDSICK (514)	1	2	1	2	1	2	- Ask (a) - See 49
	Yes _____							
	No <u>Q048</u> DK _____							
(a) Are/were you being paid every week by your employer or Running prompt	INA272 (515)	1	2	1	2	1	2	- See 49 - Ask (i)
	for only some weeks Q048 A							
(i) For how many weeks are/were you being paid?	INA267 (516) Q048 A 1							See 49

To all men aged under 66
women aged under 61

49 In the last 12 months, that is since _____, have you taken **GOVTRSCH (516A)** part in a government training scheme?

DNA Others →

Yes _____
No **Q049**

Per No		Per No		Per No	
£	p	£	p	£	p
N		N		N	

- Go to 50

1	1	1
2	2	2

- Ask (a)-(e)
- Go to 50

(a) Was it **INA246 (517)** Training Opportunities Scheme (TOPS) or Youth Training Scheme (YTS) **Q049 A** Other? Specify _____

1	1	1
2	2	2
3	3	3

- Ask (b)
- Specify below and ask (b)

(b) For how many weeks did you take part in the scheme/programme? **INA249 (518)** **Q049 B**

--	--	--

- Ask (c)

(c) What was the amount of allowance you last received? **TRAINGEN (519)** **Q049 C**

--	--	--

- Ask (d)

(d) How long did this cover? **PERC 519 (520)** **Q049 D** Enter period code _____

--	--	--

If code 9, specify period

(e) Are you receiving benefit at present? **INA273 (521)** Yes _____ No **Q049 E**

1	1	1
2	2	2

- Ask 50

To all
Refer Informant to Prompt Card K

50 In the last 12 months that is since _____ have you received any of the state benefits shown on Card K? **BENCARDK (521A)** Yes **Q050** No to all _____

1	1	1
2	2	2

- Code (a)-(d)
- See 51

Exclude Supplementary benefit from (a) to (d)
Exclude Christmas bonus from (a) to (d)

(a) Industrial injury disablement benefit (Include Reduced Earnings Allowance) **INDDIS (521B)** Yes _____ No **Q050 A**

1	1	1
2	2	2

- Ask (i)-(iv)
- Go to (b)

(i) For how many weeks did you receive this benefit? **INA205 (522)** **Q050 A 1**

--	--	--

- Ask (ii)

(ii) What was the amount of benefit you last received? **INDDISBN (523)** **Q050 A 2**

--	--	--

- Ask (iii)

(iii) How long did this cover? **PERC 523 (524)** **Q050 A 3** Enter period code _____

--	--	--

If code 9, specify period

(iv) Are you receiving benefit at present? **INA238 (525)** Yes _____ No **Q050 A 4**

1	1	1
2	2	2

- Ask (b) 87

Q 50 (cont'd)

		Per No		Per No		Per No			
		£	p	£	p	£	p		
(b) NI Unemployment Benefit Exclude TOPS/YTS and other training allowances	UNEMBEN (525A) Yes	1		1		1		- Ask (I)-(IV) - Go to (c)	
	No Q050 B	2		2		2			
(i) For how many weeks did you receive NI unemployment benefit?	INA222 (526) Q050 B 1							- Ask (II)	
(ii) What was the amount of benefit you last received?	UBPAYAMT (527) Q050 B 2							- Ask (III)	
(iii) How long did this cover?	PERC527 (528) Q050 B 3 Enter period code							- If code 9, specify period	
(iv) 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))	INA223 (529) Yes	1		1		1		- Ask (c)	
	No Q050 B 4	2		2		2			
(c) Family income supplement	FIS (529A) Yes	1		1		1		- Ask (I)-(IV) - Go to (d)	
	No Q050 C	2		2		2			
(i) For how many weeks did you receive this benefit?	INA256 (530) Q050 C 1							- Ask (II)	
(ii) What was the amount of benefit you last received?	FISBEN (531) Q050 C 2							- Ask (III)	
(iii) How long did this cover?	PERC531 (532) Q050 C 3 Enter period code							- If code 9, specify period	
(iv) Are you receiving benefit at present?	INA257 (533) Yes	1		1		1		- Ask (d)	
	No Q050 C 4	2		2		2			
(d) Supplementary benefit Exclude Housing Benefit Include direct payment of gas and electricity	SUPBEN (53) Yes	1		1		1		- Ask (I)-(IV) - See 51	
	No Q050 D	2		2		2			
(i) For how many weeks did you receive this benefit?	INA228 (534) Q050 D 1							- Ask (II)	
(ii) What was the amount of benefit you last received?	SUPBAMT (535) Q050 D 2							- Ask (III)	
(iii) How long did this cover?	PERC535 (536) Q050 D 3 Enter period code							- If code 9, specify period	
(iv) Are you receiving benefit at present?	INA229 (537) Yes	1		1		1		- See 51	
	No								

To women aged under 51 only

		Per No		Per No		Per No		
		£	p	£	p	£	p	
DNA Women aged 51 & over and all men →		N		N		N		- Go to 52
Refer informant to Prompt Card L								
51 In the last 12 months that is since have you received any of BENCARDL (537A) the state benefits shown on Card L? QOSI		Yes → 1		No to all → 2		1		- Code (a)-(d) - Go to 52
(a) Maternity allowance MATALL (537B)		Yes → 1		No QOSI A → 2		1		- Ask (i)-(iv) - Go to (b)
(i) For how many weeks did you receive this benefit? INA239 (538) QOSI A 1								- Ask (ii)
(ii) What was the amount of benefit you last received? MATALAMT (539) QOSI A 2								- Ask (iii)
(iii) How long did this cover? PERC539 (540) QOSI A 3 Enter period code →								If code 9, specify period
(iv) Are you receiving benefit at present? INH240 (541) Yes → 1 No QOSI A 4 → 2		1		2		1		- Ask (b)
(b) NI Maternity grant MATGRANT (541A)		Yes → 1		No QOSI B → 2		1		- Ask (i) - Go to (c)
(i) What was the total amount of grant you have received in the last 12 months? MATGRAMT (542) QOSI B 1								- Ask (c)
(c) Maternity pay from your employer under the Employment Protection Act INA27+(543)		Yes → 1		No QOSI C → 2		1		- Ask (d)
(d) Statutory maternity pay from your employer or former employer? SMP (543A)		Yes → 1		No QOSI D → 2		1		- Ask (i)-(iii) - Go to 52
(i) For how many weeks did you receive this benefit? SMPWKS (543B) QOSI D 1								- Ask (ii)
(ii) For how many years have you worked for the employer paying this maternity benefit? SMPLTSER (543C) QOSI D 2		Less than 2 years → 1		More than 2 years but less than 5 years → 2		5 years or more → 3		- Ask (iii)
(iii) Are you receiving benefit at present? SMPBENAR (543D)		Yes → 1		No QOSI D 3 → 2		1		- Ask 52

To all

Refer informant to Prompt Card M

52 In the last 12 months, that is since have you received any of the state benefits shown on Card M?

Per No		Per No		Per No	

BENCARDM (543E)

Yes Q052
No to all

£	p	£	p	£	p
1		1		1	
2		2		2	

Code (a)-(c)
Go to 53

(a) NI Death grant

DEAGRANT (543F)

Yes
No Q052 A

1		1		1	
2		2		2	

Ask (I)
Go to (b)

(i) What was the total amount of DEAGRANT(544) grant you have received in the last 12 months? Q052 A 1

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

Ask (b)

(b) Christmas Bonus?

PXMASBON(549A)

Yes
No Q052 B

1		1		1	
2		2		2	

Ask (I)
Go to (c)

(i) What was the total amount of PXMASBONAM(550) Christmas Bonus you have received in the last 12 months? Q052 B 1

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

Ask (c)

(c) Any NI or State benefit not mentioned earlier?

OTHBEN(545)

Yes
No Q052 C

1		1		1	
2		2		2	

Specify below and ask (i)-(iv)
Go to 53

Include Job Release Allowance
War Widows Benefit
Industrial Widows Pension

(i) What was the total number of weeks you have received this benefit? Q052 C 1

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

Ask (ii)

(ii) What was the amount of benefit you last received? Q052 C 2

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

Ask (iii)

(iii) How long did this cover? Enter period code Q052 C 3

PERC 547 (548)

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

If code 9, specify period

(iv) Are you receiving benefit at present? Yes
No Q052 C 4

INA233(549)

1		1		1	
2		2		2	

Ask 53

To all

53 In the last 12 months, that is since _____, have you received trade union sick pay or strike pay, Friendly Society benefits, benefits under private sickness scheme, accident insurance, hospital savings scheme? **TUSICKPY (553)**

(Exclude lump sum benefits and pension)

Yes _____
No **Q053**

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a)-(d)
Go to 54

(a) For how many weeks did you receive this benefit? **INA230 (554)**
Q053 A

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

Ask (b)

(b) What was the amount of benefit you last received? **TUSICKBEN (555)**
Q053 B

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

Ask (c)

(c) How long did this cover? **PERC555 (556)**
Q053 C Enter period code

--	--	--

If code 9, specify period

(d) Are you receiving benefit at present? **INA231 (557)**
Yes _____
No **Q053 D**

1	1	1
2	2	2

Ask 54

54 Are you at present receiving a pension from a previous employer, a pension from a trade union or Friendly Society, an annuity or personal pension or a payment from a trust or covenant? **EMPPEN (557A)**
Q054 Yes _____
No to all _____

1	1	1
2	2	2

Ask (a)-(d) and (i) on page 33
Go to 55

Include pension from previous employer of deceased spouse or other relative

RECORD 68

PAB To staple to page 50

54 (cont'd)

EMPFRNO(5516) Q054 1
 EMPITNO(551c) Q054 2
 TYMPEN(558) Q054 3
 EMPFRNY(560) Q054 4
 Ref No
 PERC-560(561) Q054 5
 EMPENTX(561) Q054 6
 EMPENTX(562) Q054 7
 EMPENTT(563) Q054 8

Office Use			
CI			
Interview Use			
Area	Ser	Hid	

Record details of income received	Per No	Ring Item No	Off Use	Last payment		Enter period code	If code 9 specify period	Was tax deducted at source?		Amount of tax deducted at source		Was last payment	
				£	p			Y	N	£	p	before tax?	after tax?
Employee pension from (a) A previous employer Include pension from previous employer of deceased spouse or other relative		1	1					1	2			1	2
		2	1					1	2			1	2
		3	1					1	2			1	2
(b) Annuity and personal pension?		1	3					1	2			1	2
		2	3					1	2			1	2
(c) Payment from trust or covenant?		1	4					1	2			1	2
		2	4					1	2			1	2
(d) Pension as a member of a Trade Union or Friendly Society?		1	2					X		X		X	
		2	2					X		X		X	

I n d i v i d u a l p r o m p t

RECORD 56

To all at present receiving an employee pension (coded Yes 1 at 54 (p 32) and answering at (a) above)

DNA Not receiving pension →

(I) Are there any other deductions?
Record answers in grid below

INB351(563A)
Q054 9

DO NOT KEY		DO NOT KEY		DO NOT KEY	
Per No		Per No		Per No	
N		N		N	
					OFF USE

Per No	Other deductions		IF YES Purpose of deduction PROBE FULLY	Amount		Was deduction made at source?		Was last pension payment	
	Yes	No		£	p	Yes	No	Before deduction?	After deduction?
	Y	X				Y	X	B	A
	Y	X				Y	X	B	A
	Y	X				Y	X	B	A



To all

RECORD 56

Refer informant to Prompt Card N

55 Do you have now, or have you had in the last 12 months, savings accounts with any of the banks or societies shown on card N?

SAVINGS (574)
 Yes POSS
 No to all

Per No		Per No		Per No	

£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a)-(f)
 - Go to 58

Joint accounts

- Code '1' in each person's column
- Enter interest in one person number column only and note in margin that it is a joint account

(a) National Savings Bank (Post Office) Ordinary Account(s)

SAVINT1 (575F)
 Yes
 No POSSA

1		1		1	
2		2		2	

- Ask (i)
 - Go to (b)

(i) What was the total interest over the last 12 months?

SAVAMIN1 (576)
POSSA 1

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

- Ask (b)

(b) National Savings Bank (Post Office) Investment Account(s)

SAVINT2 (575G)
 Yes
 No POSSB

1		1		1	
2		2		2	

- Ask (i)
 - Go to (c)

(i) What was the total interest over the last 12 months?

SAVAMIN2 (576)
POSSB 1

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

- Ask (c)

(c) Trustee Savings Bank Ordinary Savings Account(s) and Investment Deposit Account(s)

SAVINT3 (575H)
 Yes
 No POSSC

1		1		1	
2		2		2	

- Ask (i)
 - Go to (d)

(i) What was the total interest over the last 12 months?

SAVAMIN3 (576B)
POSSC 1

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

- Ask (d)





Q.55 (cont'd)

		Per No		Per No		Per No			
		£	p	£	p	£	p		
(d) Building Society	SAVINT4(575I)								
	Yes →	1		1		1		- Ask (l)	
	No → Q055D	2		2		2		- Go to (e)	
(l) What was the total interest over the last 12 months?	SAVAMIN4(576c)							- Ask (e)	
	Q055D1								
(e) Deposit and savings accounts with High Street Banks	SAVINT5(575J)								
	Yes →	1		1		1		- Ask (l)	
	No → Q055E	2		2		2		- Go to (f)	
(l) What was the total interest over the last 12 months?	SAVAMIN5(576d)							- Ask (f)	
	Q055E1								
(f) Any other savings banks or societies	SAVINT6(575k)								
	Yes →	1		1		1		- Ask (l)	
	No → Q055F	2		2		2		- Go to 56	
(l) What was the total interest over the last 12 months?	SAVAMIN6(576e)							- Ask 56	
	Q055F1								





To all

Refer Informant to Prompt Card O

56 At present do you have any money in any of the investments shown on card O?

INVEST (576F)

Q056

Yes

Include children under 18 at 72

No to all

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a)-(g)
- Go to 57

Refer to card P and record group codes below

(a) Index-linked National Savings Certificates

INVTPE1 (576G)

Yes

No Q056 A

1		1		1	
2		2		2	

- Ask (I)
- Go to (b)

(I) In which group on this card does your amount of investment fall?

INVAMT1 (576N)

Q056 A 1

Enter code from prompt card P

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

- Ask (b)

(b) Fixed Interest National Savings Certificates

INVTPE2 (576H)

Yes

No Q056 B

1		1		1	
2		2		2	

- Ask (I)
- Go to (c)

(I) In which group on this card does your amount of investment fall?

INVAMT2 (576O)

Q056 B 1

Enter code from prompt card P

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

- Ask (c)

(c) Save As You Earn (National Savings) Include all issues

INVTPE3 (576I)

Yes

No Q056 C

1		1		1	
2		2		2	

- Ask (I)
- Go to (d)

(I) In which group on this card does your amount of investment fall?

INVAMT3 (576P)

Q056 C 1

Enter code from prompt card P

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

- Ask (d)





Q.56 (cont'd)

	Per No		Per No		Per No		
	£	p	£	p	£	p	
<p>(d) Save As You Earn (Building Societies) include all issues</p> <p>INVTYPE 4 (576J) Yes <u>Q056 D</u> No <u>Q056 D</u></p>	1		1		1		- Ask (i) - Go to (e)
<p>(i) In which group on this card does your amount of investment fall?</p> <p>INVAMT 4 (576Q) Enter code from prompt Q056 D 1</p>							- Ask (e)
<p>(e) Premium Bonds</p> <p>INVTYPE 5 (576K) Yes <u>Q056 E</u> No <u>Q056 E</u></p>	1		1		1		- Ask (i) - Go to (f)
<p>(i) In which group on this card does your amount of investment fall?</p> <p>INVAMT 5 (576R) Enter code from prompt Q056 E 1</p>							- Ask (f)
<p>(f) National Savings Income Bonds</p> <p>INVTYPE 6 (576L) Yes <u>Q056 F</u> No <u>Q056 F</u></p>	1		1		1		- Ask (i) - Go to (g)
<p>(i) In which group on this card does your amount of investment fall?</p> <p>INVAMT 6 (576S) Enter code from prompt Q056 F 1</p>							- Ask (g)
<p>(g) National Savings Deposit Bonds</p> <p>INVTYPE 7 (576M) Yes <u>Q056 G</u> No <u>Q056 G</u></p>	1		1		1		- Ask (i) - Go to 57
<p>(i) In which group on this card does your amount of investment fall?</p> <p>INVAMT 7 (576T) Enter code from prompt Q056 G 1</p>							- Ask 57



To all
Refer Informant to Prompt Card Q

57 In the last 12 months, that is since
have you received or been credited with
any interest or dividends on the
investments shown on Card Q? **INVCARDQ (578)**

Q057

Yes →
No to all →

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a)-(f)
- Go to 58

(a) Government gilt-edged stock
including war loan after
deduction of tax at source?

WARLOAN (578A)

Yes →
No **Q057 A** →

1		1		1	
2		2		2	

- Ask (i)
- Go to (b)

(i) What was the total interest over
the last 12 months?

WARLNT (579)
Q057 A 1

- Ask (b)

(b) Government gilt-edged stock
including war loan before
deduction of tax at source?

WRLNBEF (579A)

Yes →
No **Q057 B** →

1		1		1	
2		2		2	

- Ask (i)
- Go to (c)

(i) What was the total interest and dividends
over the last 12 months?

WRLNBINT (579B)
Q057 B 1

- Ask (c)

(c) Unit trusts?

UNITTRST (579C)

Yes →
No **Q057 C** →

1		1		1	
2		2		2	

- Ask (i)
- Go to (d)

(i) What was the total interest and dividends
over the last 12 months?

UNTRSTIN (580)
Q057 C 1

- Ask (d)





Q.57 (cont'd)

(d) Stocks, shares, bonds, debentures, local authority securities or any other securities after deduction of tax at source?

STOCKSSH (580A)
Q057 D

Yes

No

Per No		Per No		Per No	

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (l)

- Go to (e)

(l) What was the total interest and dividends over the last 12 months

STOSHINT (581) Q057 D1

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

- Ask (e)

(e) Stocks, shares, bonds, debentures, local authority securities or any other securities before deduction of tax at source?

STSHBEF (581A)
Q057 E

Yes

No

1		1		1	
2		2		2	

- Ask (l)

- Go to (f)

(l) What was the total interest over the last 12 months?

STSHBINT (581B)
Q057 E 1

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

- Ask (f)

(f) Interest from private loans?

PRLINT (581C)

Yes

No

Q057 F

1		1		1	
2		2		2	

- Ask (l)

- Go to 58

(l) What was the total interest over the last 12 months?

PRINTAM (581D)
Q057 F 1

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

Ask 58



To all

Per No		Per No		Per No	

58 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 (581E)
 Yes _____
 No 0058

£	p	£	p	£	p
1		1		1	
2		2		2	

Ask (a)
 Go to 59

*at 13 Household Schedule

(a) How much did you receive in the last 12 months before deducting income tax but after deducting all allowable expenses?

RENRECAM (582)
0058 A

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

Ask 59

59 In the last 12 months, that is, since have you received any other unearned income? Include income as sleeping partner in business, royalties etc

LINEARNIN (582A)
 Yes _____
 No 0059

1		1		1	
2		2		2	

Specify source below and ask (a)
 Go to 60

(a) How much have you received in the last 12 months?

LINEARNAM (582B)
0059 A

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

Ask 60

To all

Per No		Per No		Per No	

Refer Informant to Prompt Card R

60 In the last 12 months, that is since you have received any of the following allowances shown on card R?

ALLOW (582c)
 Yes ϕ 060
 No to all

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)-(d)
 - See 61

(a) What allowances have you received

ALLTYPE (583)

Code all that apply
 ϕ 060 A

- 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?

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

- Ask (b) - (d)

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

ALLRECAM (584)
 ϕ 060 B

(b) How much was the last payment?

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

- Ask (c)

PERC 584 (585)

(c) How long did this cover?

Enter period code
 ϕ 060 C

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

If code 9, specify period

(d) Are you receiving the allowance at present?

ALLPRES (585A)
 ϕ 060 D

1		1		1	
2		2		2	

- See 61

To a married person whose spouse is not a member of household (coded 2 in col 5) or who is an absent spender (not ringed in column 9 of Page 1, Schedule A)

DNA →

Per No		Per No		Per No	

ε p ε p ε p

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

Go to 62

61 Have you received any allowances from your husband/wife while he/she has been away?

SPOUSEAL (585 B)

Yes →
No 0061 →

1		1		1	
2		2		2	

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

(a) How much in total allowances have you received from your husband/wife while he/she has been away? 0061 A

SPOUALRE (586)

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

- Ask (b)

(b) How long does this amount cover?

PERC 586 (587)

0061 B
Enter period code →

--	--	--	--

If code 9, specify period

Now ask (c)

(c) (In addition to the allowance mentioned), does your husband/wife pay direct any household expenses?

SPALDIR (587A)

0061 C

Yes →
No →

1		1		1	
2		2		2	

- Specify below
- Go to 62

Per No	Household expenses paid	ε	p
	SPALDIR (588) 0061 C 1		

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

OFF USE

To all

62 In the last 12 months, that is since _____, have you received any coke or coal from your present (or former) employer?

COAL (594)
Q062

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	

Ask (a)
Go to (b)
See 63

(a) What is the brand of coke or smokeless fuel you have mentioned?

(b) What quantity of have you received in the last 12 months?

COALLBS (594A)
Q062 B1
Lbs →

COALCWTS (594B)
Q062 B2
Cwts →

COALTONS (594C)
Q062 B3
Tons →

COALOTH (594D)
Q062
Other measure →

Specify below and ask (c)

(c) Was the _____ provided free, or did you have to pay something for it?

FREE COAL (597)
Q062 C

Free →
Pay something →

See 63
Ask (f)

(f) How much did you pay, including any haulage costs?

COALPAY (598)
Q062 C1

See 63

INB322 (598A)
Q062 C2

OFF USE

To all men aged 65 & over and women aged 60 & over

DNA Others →

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

Go to 64

63 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 (598E)
Q063

Yes →
No →

No concessionary bus travel provision in area →

1		1		1	
2		2		2	
3		3		3	

Ask (a)
Go to 64

(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?

CONBUSTY (599) Q063A

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

Go to 64
Specify below and ask 64

N.B. If more than one scheme in local authority area establish which one informant has

To all

64 During the last 12 months that is since _____, have you received any money as a mail order agent or babysitter?

MAILBABY(599A)
Q064

Baby sitter →
Mail order agent →
No to both →

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	

Ask (a) & (b)
Go to 65

MLBABAMT(601)
Q064 A

(a) How much did you earn in the last 12 months? →

£	p	£	p	£	p

Ask (b)

(b) Are you doing this work at present? INA275(602)

Yes →
No Q064 B →

1		1		1	
2		2		2	

Ask 65

65 During the last 12 months, that is since _____, have you paid any income tax direct to Inland Revenue?

DIRTAX(606A)
Yes →
No Q065 →

1		1		1	
2		2		2	

Ask (a) & (b)
Go to 66

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)
Q065A

£	p	£	p	£	p

Ask (b)

(b) What was the source of income on which you were taxed? →

Ask 66

66 Has Inland Revenue or DHSS refunded any income tax direct to you during the last 12 months?

DIRTAXR(607A)
Yes →
No Q066 →

1		1		1	
2		2		2	

Ask (a)-(c)
See 67

Exclude NI refunds and refunds included in wage or salary

(a) How much was refunded? →

DIRTYRAM(608)
Q066 A

£	p	£	p	£	p

Ask (b)

(b) Was this a refund of tax deducted under PAYE? →

PAYEREF(609)
Yes →
No Q066 B →

1		1		1	
2		2		2	

Ask (c)

(c) Was this refund received in respect of either unemployment or redundancy? →

REDNREF(610)
Yes →
No Q066 C →

1		1		1	
2		2		2	

See 67
Ask (f)

(f) What was the reason for the refund? →

See 67

To all men under 66 and all women under 61 who are not employees (coded 2-7 at 1).

Per No		Per No		Per No	

£	p	£	p	£	p
N		N		N	

DNA Others →

- Go to 66

67 Do you pay a regular National Insurance Contribution? Exclude lump sum payments, which go at 68

NICONT (482A)
Yes →
No Q067 →

1	1	1
2	2	2

- Ask (a) & (b)
- Go to 68

(a) How much was the last contribution you paid?

NICONTAM (483)
Q067A →

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

- Ask (b)

(b) How long did this cover?

PERC483 (484)
Q067B Enter period code →

--	--	--	--

If code 9, specify period

Ask 68

To all

68 Have you paid any NI Contributions direct to Inland Revenue or Department of Health and Social Security during the last 12 months?

NIDIRECT (610A) Yes →
Q068 No →

1	1	1
2	2	2

- Ask (a)
- Go to 69

Exclude: Deductions from wage or salary, or regular self employed, non-employed contributions

Include: Lump sum payments by Self employed (i.e. proportion of profits) and lump sum back payments by Non-employed

DIRNIAM (611)

(a) How much did you pay →

Q068A →

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

- Ask (a)

(i) What was the reason for this direct payment? →

--	--	--	--

Ask 69

To all

69 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) Q069 1

CHARITY 2 (612B) Q069 2

CHARITY 3 (612C) Q069 3

Private individual

Charity

No to both

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	

- Ask (a)

See (a): ask (b)

- Go to 70

(a) Has/had the person(s) lived abroad for more than 12 months?

TIMEABRD(613) Q069 A 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) Q069 A 1

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

- See (b)

ABAMTDK(614A) Q069 A 2DK

1	1	1
---	---	---

- See (b)

(b) How much (in pounds) have you sent abroad to this charity (charities) in the last 12 months?

CHARAMT(615) Q069 B 1

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

- Ask 70

CHAMTDK(615A) Q069 B 2 DK

1	1	1
---	---	---

- Ask 70

ASSELIG(615B) Q069 B 3

OFF USE

Ineligible - less than £1,000

Ineligible - more than £10,000

Eligible £1,000-£10,000

Refusal

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

ASSETVAL(615C) Q069 B 4

Asset Value

£	p	£	p	£	p

To all

70 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 70
Instead relevant questions should be asked about employment or self employment

ODDJOB5(603)
Yes
No 0070

Per No		Per No		Per No	
£	p	£	p	£	p
1		1		1	
2		2		2	

Record details in grid below See 71

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 70(a)

RECORD 57

(a) Record details below -

Enter each time job took place on a separate line

Per No	Ring Item No	Description of work or advice	Amount of fee for each job £ p		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			
							FROM Month Year		TO Month Year	
A1	1		A3				A4		A5	
0010	2		0010				0010		0010	
0034	3		004				005		006	
ERNO	4						STAR		END	
01P	5		01AM				0010		0010	
	6									

See 71



RECORD 58

Ask about each dependent under 16

CHPERSNO(617)
Q071 1

Child's Per No		Child's Per No		Child's Per No	

DNA. No dependents under 16

N →

- Go to 73

71 Have any of your children received an income from any source such as earnings from a spare time job, interest on a child's bank account or income from a trust fund within the past 12 months?

CHILDINC(616)
Q071 2

Yes →

No →

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)-(e)
- Go to 72

(a) What kind of job or income? →

(b) Has he/she had this income throughout the past 12 months?
CHINCCON(616A)
Q071 B

Yes →

No →

1	1	1
2	2	2

- Go to (c)
- Ask (l)

(l) For how many weeks has he/she had it?
CHINCWKS(618)
Q071 B1

(c) How much did he/she get last time?
CHINCAMT(619)
Q071 C

(d) How often does he/she get it?
PERC619(620)
Q071 D
Enter period code →

If code 9, specify period

(e) Does he/she usually dispose of (or save) it all him/herself
partly dispose of (or save) it and give the rest to you
give it all to you?
CHINCDIS(620A)
Q071 E

1	1	1
2	2	2
3	3	3

Ask 72

If more than one source of income for each child, ask (a)-(e) for second income and record details with person number in left-hand margin

CHASSEL1(620B)
Q071 E1

OFF USE

Refusal →
Ineligible - less than £1,000 →
Ineligible - more than £10,000 →
Eligible £1,000-£10,000 →

1	1	1			
2	2	2			
3	3	3			
4	4	4			
£	p	£	p	£	p

Asset Value

CHASSVAL(620C)
Q071 F2



Ask about each dependant under 16

Refer informant to Prompt Card S

72 At present do any of your children under 16 have any money CHINVEST (621A) in any of the investments shown on card S?

Yes $\Phi 072$
No to all $\Phi 072$

Child's Per No		Child's Per No		Child's Per No	
£	p	£	p	£	p
1	2	1	2	1	2

- Code (a)-(c)
- Go to 73

Refer to Prompt Card T and record group codes below

(a) Index-linked National savings Certificates

CHINVTY1 (621c)
Yes $\Phi 072 A$
No $\Phi 072 A$

1	2	1	2	1	2
---	---	---	---	---	---

- Ask (i)
- Go to (b)

(i) In which group on this card does your child's amount of investment fall?

CHINVAMI (621J) Enter code from prompt card T
 $\Phi 072 A 1$

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

- Ask (b)

(b) Fixed Interest National savings Certificates

CHINVTY2 (621b)
Yes $\Phi 072 B$
No $\Phi 072 B$

1	2	1	2	1	2
---	---	---	---	---	---

- Ask (i)
- Go to (c)

(i) In which group on this card does your child's amount of investment fall?

CHINVAMZ (621k) Enter code from prompt card T
 $\Phi 072 B 1$

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

- Ask (c)

(c) Save As You Earn (National Savings) Include all issues

CHINVTY3 (621E)
Yes $\Phi 072 C$
No $\Phi 072 C$

1	2	1	2	1	2
---	---	---	---	---	---

- Ask (i)
- Go to (d)

(i) In which group on this card does your child's amount of investment fall?

CHINVAM3 (621L) Enter code from prompt card T
 $\Phi 072 C 1$

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

- Ask (d)





Q.72 (cont'd)

Child's Per No		Child's Per No		Child's Per No	

(d) Save As You Earn (Building Societies)
Include all issues

CHINVTY4(621F)
Yes →
No Q072D →

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)
- Go to (e)

(i) In which group on this card does your child's amount of investment fall?

CHINVAM4(621M)
Q072D1 Enter code from prompt card T →

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

- Ask (e)

(e) Premium Bonds

CHINVTY5(621G)
Yes →
No Q072E →

1		1		1	
2		2		2	

- Ask (i)
- Go to (f)

(i) In which group on this card does your child's amount of investment fall?

CHINVAM5(621N)
Q072E1 Enter code from prompt card T →

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

- Ask (f)

(f) National Savings Income Bonds

CHINVTY6(621H)
Yes →
No Q072F →

1		1		1	
2		2		2	

- Ask (i)
- Go to (g)

(i) In which group on this card does your child's amount of investment fall?

CHINVAM6(621Q)
Q072F1 Enter code from prompt card T →

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

- Ask (g)

(g) National Savings Deposit Bonds

CHINVTY7(621I)
Yes →
No Q072G →

1		1		1	
2		2		2	

- Ask (i)
- Go to 73

(i) In which group on this card does your child's amount of investment fall?

CHINVAM7(621P)
Q072G1 Enter code from prompt card T →

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

Ask 73

TO PUNCHERS	TO PUNCHERS	TO PUNCHERS
END KEYING THIS CHILD KEY NEXT CHILD	END KEYING THIS CHILD KEY NEXT CHILD	END KEYING THIS CHILD END ALL KEYING

To all spenders and about each child under 16 in the household

73 (a) You have already told me that you or your child have

- Current bank account(s) - Page 45, Household Schedule
- *National Savings Bank ordinary a/c(s)
- *National Savings Investment a/c(s)
- *Trustee Savings Bank ordinary savings a/c or investment deposit a/c(s)
- *Building Society account(s)
- *Deposit or savings account(s) at a high street bank
- Index-linked NS Certificates
- Fixed-interest NS Certificates
- Save-as-you-Earn (NS)
- Save-as-you-Earn (Building Society)
- Premium Bonds
- National Savings Income Bonds
- National Savings Deposit Bonds
- Government gilt-edged stock **after tax**
- Government gilt-edged stock **before tax**
- Unit Trusts
- Stocks Shares Bonds Debentures, Local Authority Securities **before tax**
- Stocks Shares Bonds Debentures, Local Authority Securities **after tax**

Prompt all where account or investment held

Per No	Per No	Per No	Per No
ENTER TICK WHERE HOLDING			

Ask (b)

No to all savings → N - Go to next schedule

Ask all spenders and about all children under 16 who have savings at 73(a)

Married couples (coded 1 or 2 at Q 5 on front page of Household Schedule) should be treated as one unit at (b) and (c), i.e. the current value of both their holdings should be added together when answering (b) or (c)

All other spenders and children in the household should be treated individually and their amounts should be entered in separate columns

(b) Thinking of the savings I've just mentioned, would you say that the total current value held by

Prompt where appropriate

[you (and your wife/husband)
your child]

is less than £1,000?

Yes, the value is less than £1000 →

No, the value is more than £1000 →

Husband and wife
Y
X

Per No
Y
X

Per No
Y
X

Per No
Y
X

Go to next schedule

Ask (c)

(c) Would you say that the total current value held by

Prompt where appropriate

[you (and your wife/husband)
your child]

is more than £10 000?

Yes, the value is greater than £10 000 →

No, the value is less than £10 000 →

Y
X

Y
X

Y
X

Y
X

Go to next schedule

See 74 - 82

To all with current bank account(s) at 73(a)

Use separate column for each account							
Per No		Per No		Per No		Per No	
£	p	£	p	£	p	£	p

74 How much do you have in your current account/giro account? →

See 75

To all with savings accounts marked * at 73(a)

75 How much do you/your child have in each savings account?

Describe account

Use separate column for each account							
Per No		Per No		Per No		Per No	
£	p	£	p	£	p	£	p

To all with Index-linked and Fixed Interest National Savings Certificates at 73(a)

76(a) Which issues do you/your child hold?

(b) In which month and year did you/your child acquire each issue?

(c) What was the total value of the certificate(s) when you/your child acquired them?

Use separate line for each issue					
Per No		(a) Issue details	(b) Acquisition date		(c) Total value of Certificates when acquired
			Month	Year	
					£
					£
					£
					£

See 77

To all with National Savings S A Y E at 73(a)

77(a) Which S A Y E Issue is it?

(b) In which month and year did you/your child start the S A Y E ?

(c) How much do you/your child regularly pay?

(d) What period does this cover?

(e) Approximately how much is there in the S A Y E now?

Use separate line for each issue							
Per No		(a) S A Y E issue details	(b) When started		(c) Amount of regular payment	(d) Period of payment	(e) Estimated value
			Month	Year			
					£	£	
					£	£	
					£	£	
					£	£	

See 7

To all with Building Society S.A.Y.E. at 73(a)

78(a) In which month and year did you/your child start the S.A.Y.E.?

(b) How much do you/your child regularly pay?

(c) What period does this cover?

(d) Approximately how much is there in the S.A.Y.E. now?

Use separate line for each issue						
Per No		(a) When started		(b) Amount of regular payment	(c) Period of payment	(d) Total value
		Month	Year			
				£		£
				£		£
				£		£
				£		£

See 79

To all with Premium Bonds at 73(a)

79(a) What is the total value of all the Premium Bonds you/your child hold?

N.B. Do not list Premium Bonds on separate line

Use separate line for each person		
Per No		Total value of all Premium Bonds held
		£
		£
		£
		£

See 80

To all with National Savings Income Bonds at 73(a)

80(a) How many National Savings Income Bonds do you/your child hold?

(b) What is the total value of the Income Bonds?

Use separate line for each person			
Per No		(a) Number of NS Income Bonds	(b) Total value of Income Bonds
			£
			£
			£
			£

See 81

To all with National Savings Deposit Bonds at 73(a)

81(a) In which month and year did you/your child acquire each bond?

(b) What is the total value of the Deposit Bonds?

Use separate line for each Bond				
Per No		(a) Acquisition date		(b) Total value of Deposit Bonds
		Month	Year	
				£
				£
				£
				£
				£
				£
				£

See 82

To all with gilt-edged stock, unit trusts, stocks and shares, etc. at 73(a)

62 (a) Which securities do you/your child hold?

(Give as full details as possible)

(b) How many shares/bonds do you/your child hold of _____?

(Describe security)

(c) Approximately how much is it worth?

Use separate line for each security			
Per No	(a) Description of security	(b) No of shares/units/ bonds etc	(c) Total value
			£
			£
			£
			£

End income schedule

PERIOD CODES:-

[ENTER AS SINGLE DIGIT]

WEEK	1
TWO WEEKS	2
THREE WEEKS	3
FOUR WEEKS	4
CAL. MONTH	5
THREE MONTHS	6
SIX MONTHS	7
YEAR	8
OTHER PERIOD	9

FAMILY EXPENDITURE SURVEY - 1987

RECORD 113

Off Use		CI					PERSON (D05) 00006	
SERNUMD (D03) 00004		Interviewer use						
Area		Ser	Hid	Per No	7-day period			D 1987
AREANUMD (D02) 00003			0		EXRWC (D06) 00007			
Ref No		HHNUMD (D04) IN CONFIDENCE 00005		1				

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 40

FOR INTERVIEWERS USE			
	NO	X	Explain credit card account payment pages
Credit card at Q 79 (S837A)	YES	Y →	

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 first week of record keeping, we would like you to copy the following details from the account.

- 1 Name of credit card company
- 2 Payment made to credit card company during the 1st week £
- 3 Date of payment

ITEMS SHOWN ON THIS CREDIT CARD ACCOUNT

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

Interest charged on the account should be entered on the top line

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	If food, alcoholic or soft drink brought home Name of shop where bought	Ring item No	Cash price of item		OFF. USE	
				£	p	PLEASE LEAVE BLANK	
	Interest charged (if any)	C/N	1				
	CCNO (C07) P0008		2				
			3				
			4				
			5				
			6				
	CCITEMNO (C08)	P0009	7				
	CCASHPR (C09)	P0010	8				
			9				
	CCITCODE (C10)	P0011	10				
	CCQUAL (C11)	P0012	11				
			12				
			13				

CONTINUE OVER PAGE →

RECORD OF EXPENDITURE

FIRST DAY

Date

Please write each item on a separate line

Food and drink brought home (except take-away meals).
Include alcoholic drinks and soft drinks brought home.

PAGE 003

RECORD 114

DCASHPR (208)

900013

ITEMCOD (209)

900014

DQUAL (210)

900015

Take-away meals brought home, eg fish and chips, take-away Chinese food,
Meals on Wheels, etc.

If any of today's expenses are to be claimed as business expenses, or will be refunded, please add 'to be claimed or refunded'