

GENERAL INDEX

Sampling instructions are contained at the back of this book in a section entitled 'Sampling Details'

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NB: A line to the left of page indicates a change to instructions for 1988

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

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

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Useful Points to Get over to the Public

1.2

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

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

- 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).

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Publicity folder

1.3

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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.



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Section 3.2 and sections A1-A10 (pages 15-19) are concerned with definitions related to households, individuals and changes within households etc.

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**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

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

In cases of doubt as to whether or not a household should be included or excluded, telephone your field officer/assistant BEFORE COMMENCING THE INTERVIEW.

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**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. (See para 4.4 for adjustments to placing pattern).
- 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.

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Extension of Placing Interviews beyond the month

4.2

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All serial numbers must be called on before the end of the field period. If any serial number cannot be contacted or interviewed during the field dates but is likely to be available within the first week after the end of the field period, it 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.

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Weekly quota of four (five) - what is included

4.3

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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 91 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.

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Maximum number of visits to area (i.e. days in area)	4.4.
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You are allowed a maximum of 18 visits to the FES area to complete a full quota of FES (17 addresses) over 6/7 weeks, including the extension week if used.

For a part quota your regional office will inform you how many days you will be allowed on a pro-rata basis: the same will apply where you are asked to do collecting calls for another interviewer.

The 18 days represent the MAXIMUM number of times you will be allowed to visit the area to do placing, checking and collecting calls, visit rates and rent offices and do any late collecting calls that might be necessary for placing interviews done during the extension week.

Careful forward planning will be very necessary as there is no facility for allowing any extra days.

The usual FES pattern is for weeks 3 and 4 to sometimes require more days than other weeks because the peak is reached with:

- i. collecting calls from weeks 1 or 2,
- ii. checking calls from weeks 2 or 3 and,
- iii. placing interviews for weeks 3 or 4.

Where possible try to keep these visits to a minimum number of days to leave leeway for any problems requiring extra visits at the end of the field period.

Be flexible when arranging checking and collecting calls, if possible suggesting alternatives, and telephoning informant to confirm in advance, so that time is not wasted and calls can be grouped more suitably.

### Adjustment to placing pattern

To stay within the 18 visit allowance you may, without prior permission, deal with one extra serial number in any/each of the first three placing weeks if you can do so within the allotted days for that week. This will be where you either have a long period of waiting time before your final appointment for the day, or the final appointment is early enough for you to fit in another placing call before going home.

Towards the end of the month the use of stamped, self addressed envelopes occasionally may be necessary for households who are difficult to contact for the final call or keep breaking appointments however postal returns should only be used as a last resort. When used make sure that as well as the record books they send any missing information for A or B schedules; and their initials, surnames and full postal address for the E form.

If from the start there are doubts about their availability for the final call it is advisable to arrange this in advance, if necessary getting their telephone number, and details for the E form at an earlier call. You can then deal with any queries or problems by telephone.

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Advance letters to informants

5.1

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An advance letter is sent to each address advising residents that an interviewer will be calling. You will find spare copies in your materials. These can be handed to informants who have not received them or lost them.

Scotland only: letters are not sent in advance to multi-household addresses which need to be further sampled at the rates office. You will need to post these locally to the selected apartments after carrying out multi-household procedure.

See page 101 for copy of letter.

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PROCEDURE WITH EACH CO-OPERATING HOUSEHOLD

5.2

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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.

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First Call

5.3

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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 15).
- b. how many eligible people there are aged 16 and over within each household. (FES 'spender' defined section A5, page 16).

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.

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The interview call

5.4

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- 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.

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Starting record keeping

5.5

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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.

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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 88).

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 93).

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**Final call**

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). Surnames 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 91). 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.

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Payments to co-operating household members (16+)

5.10

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£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 also refusals to assets questions are allowable.

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Method of Payment

5.11

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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.

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

5.12

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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.



GENERAL POINTS ON SCHEDULE

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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.

#### CASE IDENTIFIER

The C.I number is entered on schedules above the reference number by PAB. During processing documents are referred to only by this number.

The C.I number is a processing number is first schedule processed is 1, second 2 etc. Other digits are added to give year and batch number etc.

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#### 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.
  - i. Whenever there is no signpost next to a code, go on to the next question.
  - ii. An 'Ask' direction occurs at a filter and signposts you to the next question, usually a 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.

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#### 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 85, 87, 91-94, 120-121, and on the Income schedule at Qs 20, 25, 50-53, 56-58, 60-67, 70 and 82.
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 1988 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 then all benefits listed at that question must have a Yes or No code ringed, not just the benefit they are receiving, i.e. if one applies then all the others must be asked and coded.

---

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 (Q16) 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

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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:-

- i. 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.

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**Head of Household Definition**

A4

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HEAD OF HOUSEHOLD DEFINITION

Please refer to page 62 'Handbook for Interviewers' for standard definitions of this term but remember to apply it to the household as defined for FES in preceding Section A3.

---

**Spender Definition**

A5

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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.



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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.

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Absences of spenders (see also D14-D17)

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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 placing interview 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 page 50 regarding Income Schedule).

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

(i) 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.15 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.

(ii) 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 71 Income Schedule - page

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

See notes for Q 71 Income Schedule - page

---

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 11. 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 70. (Except where the non-household member is a spouse of household member in which case allowance should be entered at Q71).

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

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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 64 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 64 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 64 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 64 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

i. If the rest of the household continue to record-keep to the end of the 14 days and the information for all members, including the one who died, is complete, together with his record book up to the time of death, payment will be made to all surviving members, but a separate note must be attached to household schedule, page 1.

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

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

---

**Date of interview**FRONT PAGE

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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 1988 should be entered as

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

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**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 1988. should be entered as

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

---

**Restarting Records**FRONT PAGE

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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

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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.

---

Non-relative contributory to household expenses

20

ITEM 3

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NEW FOR 1988

Where there is a non-relative of the HOH contributory on a regular basis to rent, rates or other household expenses ring code 1 opposite the non-relative.

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Marital Status

ITEM 6

---

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 otherwise use relevant code for each one.

---

Current full-time education

ITEM 7

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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 Q108-111).

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 5 - 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 - 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'.

---

Spender

ITEM 10

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Ring code 9 for all eligible spenders. If a household member is not ringed in this column be sure to note the reason for this in the box below the column. (See section A5 page 16 for spender definition).

---

D Record completed

ITEM 11

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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 12(a)

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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 13 & 14

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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 13 & 14

---

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

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

205

---

Rooms in rateable unit not yet accounted for

Q.15

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In addition to the rooms already mentioned at Q13 and 14, 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 126 is matched in full by the total number of rooms at Q13 and Q14 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 Q126 eg. "house", "shop and premises", "bungalow", "flat 1st floor".

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

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HOH: Years lived at address

Q 16

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

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Type of tenure

Q 17(a)-17(d)

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

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Rented accommodation

Q 17 (a)

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

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

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

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Owned accommodation

Q 17(b)

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Rental purchase occurs when accommodation is being purchased on a hire purchase scheme. The scheme allows buyer to claim tax relief on interest AND if unemployed they can claim Supplementary Benefit/income support on interest. Someone who has fully paid off their mortgage is coded 6 ie owned outright.

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Rent free accommodation

Q 17(c) & (d)

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

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

If coded No .... 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 17(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).

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100% Housing Benefit/Rent Rebate/Rent Allowance

Q 17A

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Note change in procedure for 1988

From April 1988 there will no longer be any 100% rates cases as all occupiers of property will have to pay at least 20% of the rates on the property. However until then 100% housing benefit can be recorded. Therefore Q17A on page 4A must be asked of renters for the first quarter of 1988. If the answer to 17A is Yes ..... 1 then ask (a) and (b) OR (c). If the answer is No .... 2 go to Q18. NOTE THAT REFERENCE NUMBER MUST BE ENTERED ON THIS PAGE.

Commencing in January 1988 therefore the practice of going to local authority rent offices to obtain details of rent for 100% cases is discontinued. Instead ask informants to consult any documents they may have and, failing this, encourage them to give their best estimate.

For the period April-December Q17A must not be asked and will have been removed from schedule at the second print. All renters will be asked Q18.

Housing Benefit is a term covering both rent and rates rebate on rent allowance.

If the accommodation is rented from a housing association or someone else (code 2, 3 or 4 at Q17(a) ask the informant for details at 17A (c) (i) and (ii). Where informant does not know rent paid on their behalf code 'D.K ..... 1'.



---

Last rent payment

Q. 18

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NOTE CHANGES IN 1988

From January-March those receiving 100% Housing Benefit will not be asked this question. Commencing in April 1988 all renters will be asked this question.

At this question 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.

---

Rent holidays

Q. 20

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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.

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Rent rebates, allowances or housing benefit

Q. 21

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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 support (Income Schedule Q56(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

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

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

This question applies to all except those whose rent includes rates. (See Q 23).

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.

---

NB These questions are asked of all households.

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.

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 Q27 is to indicate whether sewerage and water rates poundages should be added to data file by the computer.

---

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.

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.

---

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.

---

At Q's 30-39 obtain information for mortgages used to PURCHASE THE SAMPLED ACCOMMODATION ONLY. Second mortgages for home improvement, car purchase, etc should appear at Q. 85 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. 30)

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).

Hire purchase rental

This is a method of buying accommodation over a number of years on hire purchase ie a deposit is paid and then monthly rental payments are made for an agreed period. At the end of this period a nominal "purchase" payment is made. This type of purchase is arranged by special finance companies.

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Type of arrangement covered by last mortgage payment

Q. 31

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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. 31.

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. 31.

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.

c. Top up and second mortgages

See glossary.

---

Interest only mortgage payment

Qs. 32-34

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It is important to know whether the interest recorded at Q. 32 includes an amount for an insurance premium on the mortgage capital/principal. Therefore if there is an entry at Q. 32, Q's 34(a)-(d) MUST be answered.

If the mortgage capital/principal is not covered by an endowment policy (Q. 34) please specify in full how the mortgage capital/principal is covered.

Note that year insurance taken out is required at Q34(d)

---

Interest and capital/principal mortgage payment

Qs. 35-37

---

Interest at Q37 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. 35, the last payment made before interview.

---

How many years has the mortgage run/to run

Qs 38 & 39

---

These are asked of those whose last payment covered interest and capital/principal (Q35).

---

Mortgage payment, standard tax relief deducted

Q. 40

---

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. 41

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

Structural insurance can also be included in a mortgage payment.

Note that year insurance taken out is required at Q 41e.

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.

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Telephone account payment

Q. 42-48

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NOTE CHANGE FOR 1988

British Telecom budgeting scheme

At Q44 the last specified payment made should be entered. N.B. The last payment may have been a correcting payment but it should still be entered. The period covered by payment should be entered at Q45.

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

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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) (1)

---

Estimates of 12 months expenditure are acceptable here.

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

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)

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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.

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Slot meter - rebate for electricity/gas

Q.52(a)&62(a)

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Enter the total amount of rebate at Q. 52(a) or 62(a). Where the household has credit 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 credit are noted at Qs 85-87.

---

Account - amount shown on account

Q.53 & 63

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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 Qs85-87.

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.

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Board budgeting scheme - agreed payments

Q.56&66

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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

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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.

---

Insurance on structure/furniture and contents/personal possessions

Q. 71

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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 Q90.

---

Private Personal Pension

Q. 72

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This is a new question for 1988. In previous years private personal pensions information was included with life assurance.

A Private Personal Pension can also be called either a Personal Pension or Private Pension. These pensions are normally taken out by self-employed persons but can be taken out by employees who do not have a company pension scheme.

Note that prior to July you should ring code 1 under the heading 'Was the policy first taken out'. After July you should ask the question and ring code 1 or 2 as appropriate.



---

Life assurance death/endowment policies

Q. 73

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Insurance policies to be entered here fall into two main types

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

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

Year insurance taken out must be recorded. This indicates both whether tax relief is being received and the cash value of policy.

---

Other insurance policies

Q. 74

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This question includes Friendly Society policies for sickness, etc. Friendly Society life and endowment policies go at Q73.

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.

---

TV Sets/Video recorders/Home computers and cable T.V.

Q. 75

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NOTE THAT CABLE T.V. HAS REPLACED T.V. GAMES IN 1988.

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

It is essential that all T.V. sets, video recorders, home computers and cable T.V. in the household's 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 for a broken TV 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.

Cable T.V.

Cable T.V. is a service whereby a household pays to have their T.V. connected by cable to a central receiver. This allows them to receive programmes additional to the four main channels ie, BBC1, BBC2, ITV and Channel 4.

Combined T.V. and Cable T.V. rental

If the individual rentals cannot be separated then enter combined amount under T.V. and note that it includes cable T.V. rental.

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

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TV Slot meters

Q. 75 (c), (i) & (ii)

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Excess money in TV slot meters is often used to finance the purchase of other consumer durables such as washing machines. If informants mention that they are buying any goods in this way, the information should be entered at Q. 85-87 giving full details. The rebate BEFORE any deductions should be entered at Q. 75(c).

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T.V. Licence

Q. 76

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Note that total amount paid by all spenders should be entered at this question.

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Vehicles - current ownership and usage

Q. 77

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Ask Q77(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 7 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.

Q77(h). This question only applies to cars for continuous use. Do not include cars purchased from employer.

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Petrol provided for private motoring

Q. 78

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

---

Vehicles - owned or used in last 12 months

Q79

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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 Q77.

Vehicles sold in the last 3 months which are not part of a business should be shown at Q79 AND Q82.

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Refunds of vehicle licence

Q. 80

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This question is asked of all spenders.

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

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Vehicles purchased in last 3 months

Q. 81

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NOTE: FOR 1988 THIS QUESTION REFERS TO VEHICLES BOUGHT IN LAST 3 MONTHS.

Asked of all who have owned a vehicle in last 12 months (Q77 or 79)

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.85-87.

Check that vehicles mentioned at this question and credit questions 85-87 are accounted for at Q 77 or 79.

Q81(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.

Q81(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 81(f) from the amount at 81(d).

---

Vehicles sold in last 3 months

Q. 82

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NOTE: FOR 1988 THIS QUESTION REFERS TO VEHICLES SOLD IN LAST 3 MONTHS

Asked of all who have owned a vehicle in last 12 months (Q77 or 79)

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 Q79.

---

Season ticket

Q. 83

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Please ensure that information recorded here is not duplicated at Q.109 'travel to school' or at Q73 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 Q85-87.

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Credit cards

Q. 84

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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 we wish to know how many credit cards each spender has.

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Acquisitions by credit (Prompt cards A & B)

Q. 85-87

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NOTE THE FOLLOWING CHANGES FOR 1988

1. Qs 85 and 87 both have a leading filter question which is asked in conjunction with prompt cards.
2. Q 86 has two filter questions. The first asks about instalments being paid and the second about deposits that have been paid but where an instalment has not yet been paid. NOTE THE SIGNPOSTING AT Q 86A (a).

3. Qs 85 and 86 relate to instalments paid while Q 87 relates to arrangements. This means that an informant who has a charge card for example and who pays it up at the end of the month should be coded yes at Q 87 and asked (a)-(d).

Q 85 covers the most formal type of credit arrangement eg bank loan, second mortgage. Note that for 1988 Building Society and Social Fund loans have been added to list.

Q 86 cover hire purchase and credit sale agreements.

Q 87 covers other types of credit.

The questions are self explanatory and details of the different types of agreements are given below. However when recording details of repayments, always ask informant to look up loan documents or repayments card. This is particularly important at Q's 85 and 86.

---

Bank or finance house direct

Q. 85

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Where an informant has a H.P. agreement and pays the money direct to a finance house the agreement should be coded at Q85. If the money is paid to a retailer then treat as H.P. at Q86.

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. 85 at all (if used to purchase car see Q. 81 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.

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Second mortgage

Q. 85

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A 'top-up' or further mortgage is used to purchase the accommodation. These should already have been entered at Q. 30-41 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 for second mortgages. With the introduction of personal loans by building societies it is essential to probe out details.

See glossary for second, top up and further mortgage definitions.

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Loans from employer

Q. 85

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

A loan from an employer to purchase this accommodation should be treated as a mortgage and should be shown at Q 30-41.

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Loans from Social Fund

Q. 85

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Starting in April 1988 what used to be lump sum payments from the Supplementary Benefit/Income Support Office for items such as furniture, clothing, cookers etc will be made in the form of a loan to be paid back by direct payments or deduction from benefit.

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Hire purchase or credit sale

Q. 86

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Hire purchase agreements arranged directly through a finance house should be coded Finance House Loan Q85.

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Budget or option accounts and chargecards

Q. 87

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NOTE SEPARATE CODES FOR 1988

Charge-cards should be treated in the same way as budget and option accounts at Q87(b)-(d). 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.

---

Club run by shop

Q. 87

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

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

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Mail order agent (eg. Universal, Littlewoods)

Q. 87

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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 Q74).

An HP or credit sale agreement arranged by a mail order firm should be coded at Q86.

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Other mail order organisations direct

Q. 87

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

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Check trader

Q. 87

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See glossary for definition of check trader.

HP agreements with a check trader should be coded at Q.86.

Loan agreements with a check trader should be coded at Q85 as loan from finance house.

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Other person or organisation

Q. 87

---

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.

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Loans, Hire purchase and credit sales

Q. 85 & 86

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NOTE CHANGES FOR 1988

The following are general notes covering Qs 85 & 86.

- 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 85(f) and 86A(a)

Where a loan, HP agreement or second mortgage etc 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 85(f) 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 ie pay off existing loans, and then complete 85(f)-(m).

- ix. If the informant mentions at 85(f) 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 to borrow a pre-set amount of cash linked to their monthly payments. They can spend this on whatever they like. The account can be in credit or debit.

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Credit Arrangements

Q. 87

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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



## NOTE THE FOLLOWING CHANGES FOR 1988

1. New questions added for sale and purchase of property, furniture and carpets
2. Some questions now cover only 3 months retrospective purchases.
3. Changed layout for home improvements and repairs.

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 88

This is a filter question for Qs 89-92

If a spender has a permanent second dwelling in England, Scotland, Wales or Northern Ireland (coded 1 at 88 and 1 at 88(a)) then Q 89-92 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 88 and 2 at 88(a)), ie we are only interested in second dwelling in the UK.

## General points on handling Qs 89-93

Q89-93

(i) Where work was part 'DIY' and part 'someone else' enter separate amounts at relevant dependent questions.

(ii) DIY amounts can be expected to be estimates and these are acceptable.

## Installation of central heating

Q 89

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 Q90.

Include extension of central heating system at this question.

## Repairs, servicing and maintenance of central heating

Q 90

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.

---

Expenditure on sale or purchase of property (Prompt card 'E')

Q 93

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New question for 1988

Note that this question relates to expenditure over the past 12 months on purchase or sale of any property EXCEPT property only used for business. Try to obtain separate amounts for each type of service even if this means accepting estimates. However where fees for conveyancing, estate agent and surveyor cannot be separated ring code (4) at (a).

---

Expenditure on furniture (Prompt card 'F')

Q 94

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New question for 1988.

Note that this question covers 3 month retrospective period only.

This question applies to new and secondhand furniture.

---

Expenditure on carpets and carpeting (Prompt card 'G')

Q 95

---

New question for 1988.

Note that this question covers 3 month retrospective period only.

Do not include floor covering other than carpets, carpeting, mats rugs ie EXCLUDE VYNAL FLOOR COVERINGS ETC.

Include charges for fitting carpet.

---

Expenditure on holiday

Qs 96-102

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Note changes for 1988

Note that these questions now relate to 3 month retrospective period.

General points.

1. These questions are concerned with the expenditure on holidays made during the last 3 months irrespective of whether the holiday has been taken or not and regardless of the length of the holiday taken. Which means that the holiday can be of any length.
2. Holidays taken at informants holiday home or with relatives where there is no payment on a commercial basis should not be included.
3. Note that holidays in UK (England, Scotland, Wales and N. Ireland) as well as in Eire are to be identified. Channel Islands and Isle of Man are not in UK.

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**Type of holiday**Q 97

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A package holiday is one where as a minimum travel to the holiday point and accommodation are charged for jointly and cannot be paid for separately. There can be self-catering package holidays as well as holidays at hotels, boarding houses or camping sites, etc and these should be coded as package holidays at Q97 and then Qs98-100 asked rather than treated as holidays at hotel (Q101) or self-catering holiday (Q102).

---

**Bank charges**Q. 103

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This question is not concerned with deposit accounts, etc which are savings accounts and dealt with on the income schedule. (Q.65)

Where there is a joint account enter details in both holders columns for 103 (a) and (b). Enter details for 103(b)(i) 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.

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**Standing orders and direct debits**Q. 104

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**NOTE CHANGE FOR 1988**

For 1988 this question relates to items not already referred to at previous questions. If however you prefer to use it for ALL standing order payments this is permissible.

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 including payments to Safehomes/Securehomes**

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 instructions on credit card account payments in diary.

---

Prescriptions - items acquired free of charge

Q. 105

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Enter total number of items acquired per person.

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

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Liquid welfare milk and free school milk

Q. 106 and 107

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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 107)

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.

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School meals, - state school children

Q. 108

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

Note at 108(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 83 (season tickets).

Note that at 109(c)(i) the amount paid in last seven days is required.

---

NOTE CHANGES FOR 1988

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 111, 112 & 116 now relate to fees paid in last 3 months while Qs 110 and 117 ask whether spender or child are attending a course.

Holiday periods during a course are to be treated as attending a course.

Qs 110, 111 and 112 refer to spenders and children considered to be in the household for FES purposes.

Q 113. This question is to be asked of all spenders.

Q 114. 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 115-119. 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 110 and 117 EXCLUDE parental contribution towards making up a grant to full amount set.

At Q's 111A and 116 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 110(h), 111(d), 112(d), 113(b)(i) and 119(a) record the name of the examination.

- 3) At 110 ask (c) or (d) and at 117 ask (b) or (c) 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 110-119 and shown in diary record when given.

---

'A' schedule expenditure refunded by employer (prompt card 'H' ) Q.120

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

---

Money received for items of regular household expenditure (prompt card 'I') Q.121

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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).

---

Direct payment of regular household expenditure (prompt card 'I') Q.122

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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/Income Support should not be entered here. (See Q.56(d) Income Schedule).

---

Maintenance and separation allowance Q.123

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NEW FOR 1988

This question is asked of all spenders and balances Q 70 Income Schedule which asks about receipt of allowances.

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NOTE CHANGE IN PROCEDURE FOR 1988

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. Q124-126
2. Details on O.A.P. concessionary bus fares Q127.
3. NOTE CHANGE FOR 1988: You no longer need to contact local authority offices to collect rent etc for council tenants on 100% Housing Benefit.

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Rateable values and description

Q. 124-126

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It is essential that rateable value at Q. 124 and Q. 125 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. 13, 14 & 15).

---

Concessionary bus travel provisions for OAPS

Q. 127

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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.

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.

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Final check and special circumstances

Q. 128

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Check at top of page 64 should be completed and details of special circumstances recorded.

Please remember to put notes about unusual/special circumstances (which could be misinterpreted if your work is recalled on) e.g. Person 'Y' was included in household as expected to be there for 'X' time but left unexpectedly, OR Person 'Y' not included in household because he/she was expecting to leave by 'X' date but then did not do so and was there for all 14 days of record keeping.

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First checks at Home

BACK PAGE

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New for 1988

These checks are essential to ensure that documents are processed correctly and quickly by Dept. of Employment.

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Period Code List

BACK PAGE

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



SECTION INDEX

Income schedule introduction (B) .....	50
Income schedule Q1-93 .....	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.81 & 82 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) 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.44-47 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 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.

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B Schedule Questions

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Detailed points on questions are as follows

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Employment Status

Q.1

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

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

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

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

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Employee (Code 1)

Q .1 (a)

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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)

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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 74 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)

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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.

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

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

Questions to be asked of unemployed<sup>ø</sup>

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), 44-50 as appropriate.
  - b. Unemployed for more than 13 weeks but less than 52 weeks.  
Ask Q4, 4(a), 9, 9(a), 9(b) 44-49 as appropriate.
  - c. Unemployed for more than 52 weeks.  
Ask Q4, 9, 9(a), 9(b), 44-49 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. Job Training Scheme.

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

+ This includes self-employed receiving an Enterprise Allowance.

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Permanently sick or injured (code 5)

Q. 1(b)

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

---

Retired (code 6)

Q. 1(b)

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It is difficult to provide a precise definition of who is to be included in this category. In general the informant's word should be accepted, however 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 Q56(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)

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None of these (code 7)

Q.1 (b)

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"None of these" includes:

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

Persons of independent means.

People never employed and not seeking employment.

Continuing students over 16 not employed at time of interview.

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 80.

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

---

Code 2 if absent from work on what, for the informant, is a NORMAL WORKING DAY.

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Weeks away from work and weeks of paid work

Q.4

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

Q 4(a) applies to all giving a date less than 12 months before date of interview. Work here refers to regular arrangements and not odd jobs. Odd jobs should be entered at Q 80.

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.

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Retirement in last twelve months

Q.5

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

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Looking after sick or aged relative

Q.6

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

---

Permanently unable to work

Q.7

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

---

Paid work in last 12 months

Q.8(a)-(c)

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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 80 for details of odd jobs.

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



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**Most remunerative and subsidiary employment**Q's.9(a)-(c)

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It is important that where there is more than one job the informant's most remunerative job - whether as employee or self-employed - should be entered as the first job. If, on probing at this question, it is found that Q1(a) has been wrongly coded, 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 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.

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**Directors/Self-employed**Q's.9(a)-(c)

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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.

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**Last pay details**Q's.10-17

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

If someone has only recently started work and has not yet received any wages/salary, explain this in a note together with what he expects to receive in his new job, and 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 bottom 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 Q56(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.

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Date last paid and period pay covered

Q.10 & 12

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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 6/5/88. They state that they were last paid on 16/4/88 ie over two weeks before interview. The reason given for this is, that when last paid on 16/4/88 they were paid three weeks money to cover their holiday period and therefore they were not paid on 23/4/88 or 30/4/88.

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Last net wage or salary received

Q. 11

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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 25, 53 & 54).

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Refund of tax

Q. 13

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A refund of tax indicates that the pay at Q's 11-17 is not usual pay.

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Tax payment

Q. 14

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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.

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Deductions from pay for charities

Q.16

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New for 1988.

Deductions for charities can be of two types:

1. Where a tax allowance is given for the contribution ie it is tax free
  2. Where no tax allowance is given ie tax has been paid on the money contributed.
- 

Other deductions from wage/salary

Q. 17

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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.

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Pay slip consulted

Q. 17(a)

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NOTE CHANGE FOR 1988

If pay slip is consulted enter gross pay at 17(a).

If pay slip not consulted do not enter anything at Q17(a).

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Thirteen week rule

Qs.18-21,31-34

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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.

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Expenditure refunded by employer

Qs. 18-21, 30

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

Where an informant states at Qs 18-21 or 30 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.

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Mileage or fixed allowance

Q. 18

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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).

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Specified car expenses

Q. 19

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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 'J')

Q. 20

---

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

See also Q120 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. 21

---

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. 22

---

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. 23

---

Note this question refers only to paid overtime.

---

Seeking job with more hours

Q. 24

---

New for 1988

This question is asked only of those working less than 24 hours per week at Q 22.

---

Items affecting last pay (prompt card 'K')

Q. 25

---

NOTE CHANGE FOR 1988

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. 26

---

If a code has been ringed at Q.25, the informant would be expected to answer 'No ....' at Q.26 or 25(a) and usual pay given at Q.26(a) and (b).

---

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

Q. 27 & 28

---

NOTE CHANGE FOR 1988

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.29 & 30

---

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. 31

---

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. 32-34

---

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. 35-42

---

NOTE CHANGES FOR 1988

These questions are, essentially, replicas of Q's 10-17 but are for entering details of a subsidiary job where this is held as an employee.

NOTE THAT THERE IS NO Q 43.

---

Self employed income

Q. 44

---

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 Q.45 must be asked.

---

Self-employed - money drawn from business

Q. 45

---

The purpose of this question is to ascertain income from the self-employed job when the answer to Q.44 is 'Nil Profit', 'Loss' or 'DK'.

Note that if Q45(a), (c)(1) or (d) are answered 'DK' you should go to Q 46.

---

---

Total turnover

Q. 46

---

Is asked of all answering 'Don't know' to Q. 45(a) or Q.45(c)(i) or 45(d).

---

Self employed - sole ownership/partnership

Q. 47

---

Is asked of those answering Q.44 or Q.46. 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.49

---

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 Q49.

---

'A' schedule expenditure claimed for tax purposes (prompt card 'L') Q. 50

---

Q. 50 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 2'.

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 36 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.

SEE LIST ON PAGE 110 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/Income Support (Q56(d)). The inclusion of Supplementary Benefit/Income Support 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/Income Support 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 (Q51(b)) and Widows Benefit (Q51(c)).

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

Buff books are used to pay Supplementary Benefit/Income Support only or Supplementary Benefit/Income Support plus other benefits. 'Supplementary Pension'/Income Support 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/Income Support only is being received then at Q56(d) you should enter the amount of benefit shown on payment orders (page 5 etc).

Where Supplementary Benefit/Income Support 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/Income Support for entry at Q56(d) while the amount for other benefit on page three should be entered at the relevant question (eg Q51(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 Q52(d). This amount should be deducted from the total combined amount shown on payment order (page 5) and the difference entered at Q51(b) as Retirement Pension.



The initials will need to be referred to when recording component parts of Retirement Pension (Q51(b)) and Widows Benefit (Q51(c)).

Points to note

- 1) An informant may receive Supplementary Benefit/Income Support 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

Q51(b) & Q51(c)

---

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 Qs51(b)(iii) and 51(c)(iii) you should check what documents have been consulted to give the information at Q51(b)(i) and (ii) or 51(c)(i) and (ii). If documents have been consulted you then record the answers to 51(b)(iv) and 51(c)(iv).

The amounts for recording at 51(b)(iv) and 51(c)(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 B = Basic Pension increments 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
(a)	(b)			
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.				

- 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

<u>RETIREMENT PENSION</u>		13PBX	TOTAL £40.23	
FROM	RP	PENSION BREAKDOWN		
22 MAY	40.23 ( <u>Q.51(b)(i)</u> )	A	38.30	J 2.92 ( <u>Q.51(b)(iv)</u> )
		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)		
Up-rating 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 Q58(d).

---

Statutory Sick Pay, N.I. Sickness Benefit and  
Contributory Invalidity Pension

---

Q.53

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.54

This question must be asked of all answering Yes to Q53.

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.55

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. 56(b).

---

Unemployment benefit/currently received

---

Q. 56(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 J.T.S. TOPS and YTS schemes etc.

Unemployment benefit and details of the weeks unemployed in last 12 months before or after attendance on a J.T.S. 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/Income Support

Q. 56(d)

---

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

Household bills paid directly by Supplementary Benefit/Income Support should be shown at appropriate Household Schedule question with an explanatory note. The payment of Supplementary Benefit at Q56(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 Q)

Q. 57

---

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

Note that Maternity Grant has been replaced by Grant from Social fund for maternity expenses. It is means tested.

---

Maternity pay from employer

Q. 57(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. 57(d)

---

This benefit 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.

---

Death Grant/Grant from Social Fund for Funeral Expenses

Q. 58(a)

---

Death Grant has been replaced by Grant from Social Fund for Funeral Expenses. It is means tested.

---

Christmas bonus

Q. 58(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.

---

Invalid Care Allowance

Q. 58(c)

---

New for 1988.

Payment made to those caring for long term sick.

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.70

Always give full details of benefit including government department concerned.

---

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

Q.60-64

---

NOTE CHANGE FOR 1988

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.

Do not include pension from a previous employer at Q63.

Q62 deals with pension as member of trade union or friendly society.

Q64 is concerned with personal pensions normally received by retired self-employed people.

---

Other deduction from an employee pension

Q.61(f)

Normally income tax is deducted from an employee pension (Q 61(c)). 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 61. If the answer is 'No' ring code 2.

---

Savings Accounts (prompt card 'T')

Q65

---

See Q81 for children under 16.

---

Holdings of Nat Sav. certs/SAYE/premium bonds, etc (prompts card 'U' & 'V') Q.66

---

See Q 82 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.

---

Bonds and securities (prompt card 'W') Q. 67

---

NOTE CHANGE FOR 1988

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. 67(a)(i) and 67(e)(i) 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 Q67(b)(i) and 67(f)(i) the amount should be before deduction of tax.

At Q67(g) 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. 68

---

Include here all rent from let or sublet property except that connected with self employment, which should be entered at Q. 44 Income Schedule.

---

Other unearned income Q.69

---

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. 70

---

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 Q71).

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 18).

---

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

---

Q.71

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 18).

---

Coal or coke from employer

---

Q. 72

NOTE CHANGE FOR 1988

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. 73

Exclude weekly or season tickets mentioned in household schedule.

Data collected for Q.127 household schedule can, if necessary, be used to prompt this question. If the area does not have concessionary bus pass travel, then code 3.

---

Mail order agents/baby sitters

---

Q. 74

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 Q44) 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. 75

---

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. 67(a) and (e).

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

---

Income tax refunded direct by Inland Revenue or DHSS

Q. 76

---

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.77

---

NOTE FILTER BASED ON AGE AND EMPLOYMENT STATUS

Q.77 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.78.

---

Payment of NI contribution direct to Inland Revenue/DHSS

Q. 78

---

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. 78.

Voluntary contributions when they are paid regularly (ie not a lump sum), should be entered at Q. 77 and not at this question.

---

Money sent abroad

Q. 79

---

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.80

---

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 9-34 for employee main jobs; Qs 35-42 for employee subsidiary job or Qs 44-50 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 'Y' and 'Z' ) Qs.81 & 82

---

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

Q81. 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 Q51(a)). Do not include cash gifts or pocket money.

Q82. Record answers in the same way as at Q66.

---

SAVINGS QUESTIONS

Q83-93

---

NOTE CHANGE FOR 1988

These questions are included 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 Qs85-93 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 Qs85-93. 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 Q84.

- 1) The first step (Q83) 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, or by using a spare copy of page 58 (from pad of continuation pages) and ticking relevant items as investment income questions are asked.

Household schedule	Page 50	Q103	)	
Income schedule	"	41	Q65(a)-(c)	)
"	"	42	Q65(d)-(f)	)
"	"	43	Q66(a)-(c)	) Spenders only
"	"	44	Q66(d)-(g)	)
"	"	45	Q67(a)-(c)	)
"	"	46	Q67(d)-(g)	)
"	"	55	Q81	)
"	"	56	Q82(a)-(c)	) Children under 16
"	"	57	Q82(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 Qs85-93 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 Q83

---

Tick the type of account or investment held.

Note that for children under 16 you will need to check at Q81 (page 55) for any mention of investment income and at Q82 (pages 56 and 57) for any National Savings holdings. We do not know if children have bank or giro accounts.

---

Level of Assets held Q84

---

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 Qs85-93 are asked as relevant. IT IS IMPORTANT TO STRESS THAT ASSETS ARE RESTRICTED TO THE ACCOUNTS SPECIFIED AT Q84. DO NOT INCLUDE ANY OTHER ASSETS SUCH AS VALUE OF HOUSE.

---

Amount in bank/giro account (exclude savings accounts) Q85

---

NOTE CHANGE FOR 1988

Check back to Q83 to see if bank/giro account held. If yes ask Q85.

If money is left in account at end of last week/month ask 85(a).  
 If money is not left in account see Q86.

---

Amount in Savings Accounts

Q86

---

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 Q83 to see if any savings are held in these.

---

Value of National Savings Certificates

Q87

---

Check back to Q83 to see if index linked or fixed interest certificates held, if they are then ask Q87. 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

Q88

---

Check back to Q83 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

Q90

---

Check back to Q83 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

Q91 & 92

---

Check back to Q83 to see if held.

Record number and value of bonds.

---

Other type of securities

Q93

---

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 Q83 to see if any of the following held:

Government gilt edged stock

Unit trusts

Stocks, shares, bonds, debentures and local authority securities

Other securities

318

New for 1988

These checks are essential to ensure that documents are processed correctly and quickly by Department of Employment.

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From 1988 these are the following changes to the diary.

1. There is no longer a credit card account payment page.
2. Where a credit card account has been paid during the 14 days record keeping any interest on the account should be entered on page 36.
3. For daily items (right hand page) the name of the store where bought is required.
4. For alcoholic drinks whether purchased at off-licence or licenced premises is required.

---

#### Order of diary contents

D1

---

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

Pages 2 and 3 : containing explanatory notes

Pages 4 and 5 : containing example pages

Pages 6 to 19 : first week record keeping

Page 20 : blank

Page 21 : leading page for second week

Pages 22 to 35 : second week record keeping

Page 36 : refunds, winnings, and credit card account interest

Page 37 : reference list of items

Page 38 : informants notes

Page 39 : interviewer checks

Page 40 : Further information check list.

---

#### 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. Daily shopping items (other than food) eg cigarettes, tobacco, matches cleaning materials toiletries cosmetics, stationery etc etc.
  - d. Clothing, clothing material and footwear
  - e. Travel by rail, bus, air, taxi, motor vehicles, cycles etc
  - f. 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 38 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 38. 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. Date at least the first 7 days of each diary and ring the day of the week. Explain that you will date up the rest when you call back in a few days. This will save time if you have several spenders and leaves the door open for interim call.  
  
You can date up diaries for the whole 14 days if this is more convenient.
- 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 D13 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 diary on the day the goods were acquired. The words 'credit-card' or 'charge-card' must be written beside entry.

---

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

---

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:
  - i. Type - eg pork, beef, cod, apples, peas.
  - ii. Whether it was bought fresh/raw, frozen, tinned, dried, bottled, cooked etc.
- b. Baby food: Itemise type of food, eg dried milk, rusks, cereals, tinned or bottled foods.
- c. Milk bill: Is it milk or does it include eggs, cream etc? If so, itemise. If only milk, state this beside entry, for example "milk bill (milk only)".



- d. Bread bill: Itemise cakes and bread separately, or note "bread only".
- e. Alcoholic drink: Itemise type of drink, eg beer, wine, sherry, vermouth, spirits, etc
- 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. 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.

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

D7

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

---

Starting in 1988 code 1 should be ringed if alcoholic drink bought at off-licence (including supermarket etc) and code 2 ringed if bought elsewhere (eg public house, club). This is to help improve the Retail Price Index as different prices are charged at different outlets.

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). These reflect different excise duty.

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).

---

Daily shopping items (other than food) eg cigarettes, tobacco, matches, cleaning materials, toiletries cosmetics, stationery, newspapers, magazines, books, postage

D9

---

Starting in 1988 the name of the shop or store where item bought should be recorded. This is to improve Retail Price Index - see D5(i) above.

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).

---

Clothing, clothing materials and footwear

D10

---

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).

320

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 Q83 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 36 of diary, question 120 on household schedule and questions 18, 19, 20, 21, 30 and 50 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).

---

Other payments including fuel, light, entertainment, hairdressing, holidays, furniture, household goods, domestic help, lessons, deposits, instalments etc

---

D12

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'.

c. Lessons

If payments are recorded for lessons, eg driving, keep fit, aerobics, music, check whether this is FIRST lesson; if not ask Q.112 and 116 on household schedule. If it is first lesson, write 'first lesson' against entry.

d. 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 Q111, 112 and 116 on household schedule. If it is first payment, write 'first payment' beside entry.

If expenditure is for playgroup, note this fact.

e. 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.

f. Deposits

State what the deposit was for and whether it was towards a CASH purchase or a CREDIT acquisition.

g. 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.

h. Christmas and savings clubs

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

i. 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.

j. 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 'i' above).

k. Payments for sports

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

l. Medical/Dental/Optical treatment or prescriptions

Note whether National Health Service or private.

m. Food for animals

Note whether fit or unfit for human consumption.

n. Holiday payments

Note whether holiday is inside or outside the UK (see D15-17).

o. Business trips - see D17

p. 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(1).

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Shopkeepers, farmers etc

D13

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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

D14

---

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 i.e 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)

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

D15

---

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 17))

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

Informants should record on page 38 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

D16

---

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)

330

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Business trips

D17

---

Where a member of the household takes a business trip then the action to be taken is the same as for holidays (see D14-16). A careful check should be made for refunds.

---

Monthly accounts

D18

---

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

---

Page 36 - refunds and betting

D19

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NOTE CHANGE FOR 1988

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. 120 household schedule and 18, 19, 20, 21, 30 and 50 income schedule should be checked to see if refunds would have been expected on expenditure in Record Book.

1. 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 18, 19, 20, 21, 30 and 50 on the income schedule. If no items are refundable, draw a line through the box.

2. Credit card account interest where account is paid

If a credit card account is paid during the 14 days record keeping period then any interest shown on that account should be recorded here.

3. 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.

---

Card account payments

D20

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The credit card sheets previously in the diary have been eliminated. Where a credit card account is paid it should be recorded in usual way with interest entered on page 36.

---

Interviewer checks

D21

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Note that for 1988 page 39 of the diary record contains 4 checks that were previously on the 'K' schedule. These checks should be carried out on all diary records.

---

Further information required

D22

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Note that for 1988 page 40 contains a section for you to note what further information you require from informant. Precarbonised pads of this list will continue to be available if required.



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**CHECKING SCHEDULE K AND GENERAL CHECKS**7.1

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For 1988 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%.

Checks are now also included on:

Household Schedule Page 68

Income Schedule Page 68

Diary Record Page 39

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**CHECKING SCHEDULE CONTENTS**7.2

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Pages 1 & 8: Diary checks  
Page 2 : First check at home  
Pages 3 & 4: Consistency checks  
Pages 5 & 6: Specified checks  
Page 7 : Final check at home

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**DIARY CHECKS (Pages 1 & 5)**7.3

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These should be carried out at final call.

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**FIRST CHECK AT HOME (Page 2)**7.4

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This page covers checks on insurance, loans, gross pay and an optional check on some 'A' Schedule regular items.

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**CONSISTENCY CHECKS (Pages 3 & 4)**7.5

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The checks on these two pages must be carried out by interviewers working on their first three quotas. After the third quota they can be continued if you find them helpful.

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**SPECIFIED CHECKS (Pages 5 & 6)**7.6

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These must be carried out on all quotas.

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**FINAL CHECK AT HOME (Page 7)**7.7

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FINAL CALL ROUTINE: OTHER THAN REGULAR COMMITMENTS

The routine shown at the top of page 7 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 7 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 Q128 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 as specified on page - Has income for under 16 year olds been recorded at Q81 and 82?

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.

NB All efforts must be made to do a final call with informants and having diaries posted back to you should only be arranged in the following circumstances and as a last resort.

- 1) If informants definitely will not be available for a final call, eg. going on holiday, then at the interim call you should collect all the information you would normally ask for at the final call; leave a stamped, self addressed envelope so that informants can post the diaries back to you.
- 2) Where unexpected problems cause informants to be unavailable for the final call you should leave a note saying when you will call again: this should be when you are in the area to do other calls. If no contact is made leave a stamped, self addressed envelope, as above. In addition leave a note of what you require from them:

Names and initials of spenders:

Full postal address:

Telephone number:

List of outstanding items from A/B schedules:

Completed diary for each spender (for 2 weeks).

Do not make extra visits to the area on the off chance of catching these informants at home especially when you feel they are being deliberately elusive.

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

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Form H - Weekly Progress Return

8.2

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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.
- 

Form E - record of spenders in cooperating households only

8.3

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NB 'E' forms 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.

Enter the serial number in the box marked "our ref" and on E2 the number of postal orders.

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.

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.
3. Enter FULL name of the local authority covering address in which interview took place.
  4. Enter number of persons in household INCL children.
  5. Finally complete list of spenders and pin the letter and copies of E forms to the front of the household schedule AFTER CHECKING CARBON COPIES ARE LEGIBLE.

NOTES OF ANY KIND ARE NOT TO BE WRITTEN ON THE E FORMS. The correct place for notes is page 64 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 1988

To be returned in every envelope containing cooperating or non-cooperating serial numbers, which should be coded appropriately. You no longer use recorded delivery.

Budgets for all cooperating households must be returned in ENVOPAKS to your regional office. They must be checked and returned without delay so that informants get their postal orders within stated time.

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

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. Refusal to HQ letter: code X is 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.

4. 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.
5. Refusals. Code 7. a or b 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.

Additional notes and action to take.

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.

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 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 -

e. 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.

f. House demolished - also include derelict properties but explain what they are.

g. Not yet built: PAF addresses are often allocated to new developments before they are build.



h. 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 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 e) 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 than 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 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 restart informants with i.e. record books if at all possible: make extra calls if they are necessary or the informant needs help to keep the diary.

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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 WHO TELEPHONE THE OFFICE TO COMPLAIN

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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. Studying amended documents, instructions and listening to current taped interview for first quota in a year: As per administration notes sent with the rebriefing documents and tapes.

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Administration and checking time

8.8

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For checking each fully cooperating household - 1 hour 35 minutes including occupation coding, following specified checks listed on K schedule and scanning schedules for omissions and completeness of data.

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.

NOTE: Administration time, which forms part of clerical time, has now been separated out. to allow for extra questions on the schedules. We have however not reduced the 1 hour 35 minutes allowed per co-operating household for checking purposes.

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Working away from home on subsistence

8.9

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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.

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.

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**FIELD AND OFFICE TRAINING**

8.11

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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. A pre-printed notebook will be sent with your materials.

Prepare a list of points to include in your introduction - ie purpose of FES and some of its uses as discussed at the briefing.

Check which rates offices 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 or your local trainer where there is one. Sometimes we can offer useful advice or support and it helps us keep in touch with specific response problems. Also ring in if you want advice on how to deal with a potential refusal.

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.

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**Quota covering Multi Local Authority Areas**

8.12

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PAF address list straddles 2, 3 or occasionally 4 local authority areas.

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To avoid excessive time and mileage spent travelling to the offices to collect rateable value, 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: 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.

3. 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.

PAGES 101-118  
SPECIMEN HOUSING BENEFIT FORM  
COPY OF ADVANCE LETTER  
HOUSING BENEFIT CIRCULAR & EXTRACT  
METHOD OF BENEFIT  
PAYMENT  
GLOSSARY

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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

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Your reference	FES
Our reference	
Date	August 1986

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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

011

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SPECIMEN HOUSING BENEFIT  
NOTIFICATION FORM

Dear Sir/Madam,

Housing Benefit Regulations 1982

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

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

Yours faithfully,

Director of Housing.

### METHOD OF PAYING BENEFITS

We have been advised by the Department of Health and Social Security and the Department of Employment that benefits are normally paid in the following ways.

Attendance allowance	Payment book	(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.

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## GLOSSARY

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

- BANK DIRECT DEBIT - See direct debit.
- BANKERS CARD - See cheque guarantee card.
- BANK LOAN - A personal loan arranged directly through a bank. It may cover a number of articles or services or only part of an article or service, depending on the borrower's circumstances and government credit restrictions.
- BANK SAVINGS ACCOUNT - This is similar to a bank deposit account but there is often a requirement for a minimum investment and there are restrictions on when the money can be drawn out. Consequently, the interest rate is higher than for deposit accounts. Some types of bank savings account are known as Capital Investment Accounts.
- BANK STANDING ORDER - See standing order.
- BLIND PERSONS ALLOWANCE- This is an additional benefit paid with supplementary benefit to registered blind people. It is received in addition to other concessions.
- BOARD BUDGETING SCHEME - This type of scheme is operated by the Gas and Electricity Boards and by the Post Office. It works in much the same way as a bank budget account, by spreading the cost of the bills over the year with regular monthly payments. There is no interest or service charge payable with this scheme.
- BUDGET/OPTION ACCOUNT - A budget or option account is usually with a department or  
AT A SHOP OR STORE chain store. With a budget account the customer  
(SEE ALSO undertakes to make certain payments into an account,  
CHARGE CARD) 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 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  
(SEE ALSO BUDGET are Marks and Spencer and Debenhams. The card holder has  
AND OPTION ACCOUNT) 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.

- CHECK TRADER - Here, the purchaser pays for goods by check. Usually check trader calls on the purchaser to sell him a check which he can then use to buy goods in a number of shops. Some retailers issue checks also known as bonds. The largest check trading organisation in the country is the Provident. Check trading today is most prevalent in the North of England - Humberside, West Riding, Teeside, etc for textiles and household goods.
- CHEQUE GUARANTEE CARD - When paying by cheque some shops, stores, etc want 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 bank guarantee that they will honour the cheque up to £50). 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 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 the 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 regular amount is paid into the club usually through 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,
  - i. Made up pay, eg the difference between NI Sickness Benefit etc, and normal earned pay or
  - ii. half pay, ie half normal earned pay.

There are, of course, other arrangements depending on the individual employer or employee's situation.

EMPLOYMENT STATUS - See employee, self employed.

ENTERPRISE ALLOWANCE - This is a payment made to unemployed applicants who set up business in a self-employed category.

EEC TRAINING 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/FAMILY CREDIT - 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.

FAMILY CREDIT - See Family Income Supplement above.

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).

FURTHER MORTGAGE - Further mortgage can be used if mortgage given on property is not large enough. Informant can go to other mortgage company for balance of mortgage to buy property (see top up mortgage).

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 (ENDS 1988) 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
- INCOME SUPPORT See Supplementary Benefit
- 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 2-2<sup>1</sup>/<sub>2</sub> times depending on the lender's policy). The borrower, in most cases, will have to provide a deposit for the property (say 10%). Mortgage arrangements vary in the amount of interest payable and the tax relief that can be claimed. Most mortgages are one of two types, either interest and principal or interest only where there is an endowment policy covering the principal. (See Option mortgage, 'Top Up' mortgage).
- MORTGAGE TAX ALLOWANCE (M.I.R.A.S) - In April 1983 a new scheme was introduced whereby tax relief on interest can be given by the organisation granting the mortgage rather than Inland Revenue via PAYE tax coding, etc. The scheme is not universal and not all institutions have adopted it. Under the new scheme the amount of interest paid to the building society, etc, is reduced by the amount of tax relief due.
- NATIONAL INSURANCE CONTRIBUTIONS - A NI contribution is a regular contribution by individuals to enable them to obtain various national insurance benefits. All employed and self employed persons (earning more than a specified minimum amount) are required to pay a NI contribution. Some non-employed persons may also do so. There are different classes of contribution depending upon employment status.
- Employees pay class 1 contributions which are deducted from their wage or salary. There are three levels; contracted into the state pension scheme, contracted out of the state pension scheme (if the employee is in a private pension scheme) and a reduced rate paid by married women who were paying into the scheme before April 1978. (The reduced rate entitles them to fewer benefits).
- Self employed pay class 2 contributions on a regular basis and class 4 on an annual basis depending upon profits.
- Non-employed persons may also pay voluntary contributions under class 3.

NATIONAL SAVINGS BONDS                    There are two types - Income Bonds and Deposit Bonds. Income Bonds pay out a monthly income based on interest while Deposit Bonds accrue the interest until required.

NATIONAL SAVINGS BANK -    This was formerly the Post Office Savings Bank. There are two types of account; ordinary accounts and investment accounts. The investment account offers a higher rate of interest and longer withdrawal terms than the ordinary account. There are no cheque books for these accounts, for both types of account customers have a book in which all deposits and withdrawals are recorded. It is possible to transfer money from a National Savings Bank account to a National Post Office Giro account.

NATIONAL SAVINGS CERTIFICATES -    There are two types Index-linked which are described under that title and ordinary. Ordinary certificates have an issue number eg '28 issue'. They are normally for a period of 5 years.

NI RETIREMENT PENSION -    This is the basic state pension for retired people (ie men aged 65 and over, women aged 60 and over). The rate of this pension depends upon the record of NI contributions during working life. It is paid weekly by payment book.

NI SICKNESS BENEFIT -        This benefit is paid to people who are incapable of work due to sickness and have satisfied certain NI contributio conditions. Sickness benefit is paid for 20 weeks while the person is incapable of work. The benefit is claimed by filling in the NI Medical Certificate and sending it to the DHSS Office. Payment is by giro cheque, weekly. From April 1986 it will be paid only to those not qualifying for SSP (See Statutory Sick Pay).

OLD PERSONS PENSION/  
OVR 80s PENSION                The basic NI retirement pension is conditional on the record of NI contributions. Old Persons Pension is paid regardless of the NI contributions record.

ONE PARENT BENEFIT -        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 -    A pension from previous employer is based on contributions EMPLOYER                    made by the employee to the employer's pension fund or upon contributions made by the employer on the employee's behalf.

PERSONAL PENSION  
(PRIVATE PENSION)            A pension scheme usually run by an insurance company into which individuals pay while working so that they can draw a pension when retired. Most commonly used by self-employed but can be used by employees in place of a company pension scheme.

- POST OFFICE GIRO - This is also known as National Giro. When making a payment by Giro, the Giro account holder either fills in a transfer form and transfers money from his account to another Giro account, or he makes use of a standing order to another Giro account. Apart from these two methods it is also possible to make payments to a non-Giro account holder on a Giro cheque. Giro cheques can be cashed by non-Giro account holders at a post office or paid into bank accounts.
- There is also a Post Office Giro deposit account.
- PRIVATE SICKNESS SCHEMES - Private sickness schemes can be run on a commercial basis or on a private basis by workers in an undertaking. Eg, Hospital Savings Association, Insurance Companies.
- RATES - Rates are a tax on all kinds of property (commercial and private) levied by and paid to the Local Authority. The money from rates goes towards paying for local services of various kinds. The amount paid in rates depends on the rateable value of the property and the amount in the pound which the council decides to levy in a particular year.
- RATES REBATE - Some people with low incomes who are liable to pay rates may get relief towards paying them by the Local Authority. Owner occupiers or tenants may qualify for this. The amount of rebate depends on the income of the person claiming, the size of their family and the amount they pay in rates. The rebate can take the form of a refund or a reduction of the rates payable. There may be variations on this in individual circumstances. (SEE ALSO HOUSING BENEFIT).
- REDUNDANCY PAYMENTS - Under the Redundancy Payments Act 1965, an employer is, in most circumstances, legally obliged to pay a minimum lump sum in redundancy money to any employee who is made redundant after working continuously for the employer for at least two years.
- The amount of the payment depends upon the age of the person when he is made redundant; the number of completed years service (over the age of 18) and the weekly earnings at the time of redundancy. Redundancy payments under the Redundancy Payments Act are distinct from severance pay or money in lieu of notice.
- RENT ALLOWANCE - A benefit administered by the Local Authority for private tenants to help with paying their rent. To qualify, the income of the family has to be below a certain level. The amount of the allowance depends on the size of the family and the amount paid in rent and income received. The allowance takes the form of a cash amount. (SEE ALSO HOUSING BENEFIT).
- RENT REBATE - A benefit administered by the Local Authority for council tenants to help with paying the rent. To qualify, the income of the family has to be below a certain level. The size of the rebate depends on the number in the family, the amount paid in rent and income received. The rebate takes the form of a reduction in rent. (SEE ALSO HOUSING BENEFIT).

- RETIREMENT PENSION - See NI Retirement Pension.
- SAVE AS YOU EARN - Save As You Earn is a National Savings or Building Society scheme whereby a person agrees to make sixty regular monthly contributions (from a £4 minimum to a £50 maximum) over five years.
- SECOND MORTGAGE - A second mortgage is a loan usually arranged for a large item of expenditure (eg, home improvements). The distinguishing feature of this type of loan is that it uses the person's home as security, consequently the rate of interest is likely to be less than other types of long term loan.
- SELF 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.
- SOCIAL FUND - This fund replaces statutory grants such as Death Grant and Maternity Grant. Payments from it are means tested ie. a grant depends on income and need. In April 1988 lump sum payments for people on benefit towards the cost of bedding, clothing etc will be replaced by LOANS from social fund.
- 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 - Started in April 1987 this new benefit gradually replaces 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/- INCOME SUPPORT - 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.

## SAMPLING DETAILS

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- NB 1. Sampling extension for FES Queries is 2366
2. These notes form part of FES Interviewer Instructions.

## FES SAMPLING DETAILS

### THE SAMPLE

#### Conversion to PAF

Each year we call on about 11,400 addresses in Great Britain taken at monthly intervals. Until 1985 the addresses were drawn from the Electoral Register but are now taken from the Post Office's list of addresses: the Postcode Address File (PAF).

#### Effect of ineligible addresses on quota size

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

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

#### Address List

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

#### TOP LINE

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

AREA NO: 004 POSTTOWN : NORWICH

SECTOR: NR3 1 / NORWICH NORTH EAST

REGION 05

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

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

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## SECOND LINE

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

## MAIN BODY OF LIST

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

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

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

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

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

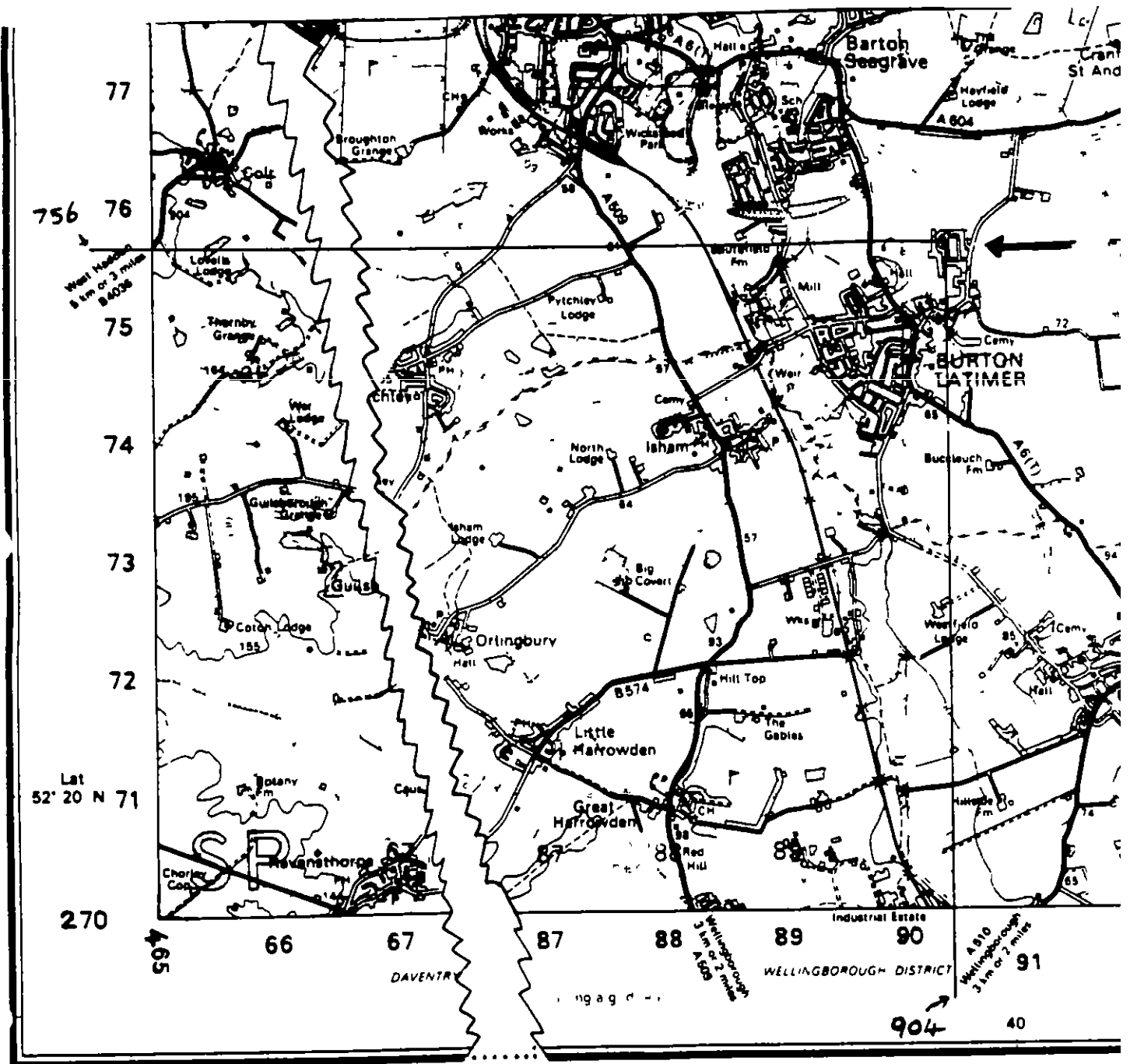
#### Using grid references on PAF samples

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

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

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

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



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

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

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

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

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

### Addresses difficult to find

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

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

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

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

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

### Blue Postcode Books

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

### Counting Households at Address

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

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

### Address Empty at First Call

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



ADDRESS LABELS

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

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

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

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

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

Details shown on label

LEFT HAND COLUMN

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

## RIGHT HAND COLUMN

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

## NON-DIVIDED AND DIVIDED ADDRESSES

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

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

### 1. Non-divided addresses

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

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

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

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

2. Divided addresses

There are two types of 'Divided Address' procedure:

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

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

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

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

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

ii. Boxed part only

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

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

### MULTI-HOUSEHOLD ADDRESSES

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

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

### ENGLAND AND WALES

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

### SCOTLAND

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

CONCEALED MULTI-HOUSEHOLD PROCEDURE  
[ENGLAND, WALES AND SCOTLAND]

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

In this case you should take the top sheet off your pad of pink CONCEALED MULTI-HOUSEHOLD SELECTION SHEETS (see example on page 13). On the front of the sheet insert the serial number of the address concerned and after talking to a responsible adult at the address list all the households living there at your first call. The listing procedure will vary according to the particular layout of the address, but it must be carried out in the way described below so that you (or another interviewer on a follow-up) can re-identify the household(s) that will be selected.

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

If the address consists of unnumbered flats or bedsitters, whether in a block of purpose-built flats or a converted house, you should list the flats in a systematic way, starting with the first on the left on the lowest floor and working in a clockwise manner on each floor.

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

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

On the back of the sheet is a selection table telling you which households to interview, according to the number you find at the address. Ring the numbers of the selected households in the left-hand column on the front of the sheet. (These numbers are not the household numbers that you will eventually use on your schedules.

Returning Concealed Multi-household Selection Sheets:

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

Extra Households per address and quota

ENGLAND AND WALES ONLY (FOR SCOTLAND SEE PAGE 20)

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

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

In counting these 21 you should include all addresses already reported on your Weekly Progress Return (S836H) (ie coded 1, 3-7) together with any extra households picked up at multi-household addresses, and all households coded 9. You should include any already returned as empty. However, you should not count in the 21 any addresses returnable as 2 (no sample selected at address), since

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

So in any one quota no more than four extra households should be chosen from concealed multi-household addresses. For example, if two concealed multi-household addresses each produce the maximum of three households then that is the four extra households. At every address after that you should select one household only, ie you should take the first household that your Concealed Multi-Household Selection sheet instructs you to interview.

#### Interviewers arrangements

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

#### Queries

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

(FOR USE IN ENGLAND, WALES AND SCOTLAND)

CONCEALED MULTI-HOUSEHOLDSELECTION SHEET

Area	1	0	6
Ser. No	1	2	

List of Households

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

IF MORE THAN 22 HOUSEHOLDS,  
RING SAMPLING - Ext 2366Procedure

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

EXAMPLE

Selection Table

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



2. PRE-SAMPLED MULTI-HOUSEHOLD PROCEDURE

(SCOTLAND ONLY)

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

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

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

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

A. Rateable Unit Selection Procedure

(SCOTLAND ONLY)

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

Example:

Entries on valuation list:

House	Gordon	Gr1
House	Kane	Gr2
House	McKendrick	1/1
Service flat	Haydon	1/2

When you have found the address at the Rating Office, enter the details as they appear on the valuation list in the box on the front of the blue Rateable Unit Selection Sheet. (See example page 17). Be sure to copy down the number or location of each rateable unit so that you (or another interviewer on a follow-up) can subsequently identify the rateable unit(s) that will be selected.

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

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

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

- either
- i. to visit the address and carry out the usual pre-sampled multi-household procedure (see Household Selection procedure on page 19).
- or
- ii. to carry out no interview at the address. In this case you need not visit the address at all. Code as 'No sample selected at the address'.

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

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

#### Special Cases

- a. If the address on your address list is marked 'DIVIDED ADDRESS', you should list rateable units only at those parts as instructed on your address list, ie 'BOXED PART ONLY' or 'BOXED PART AND ANY PARTS NOT LISTED ON ADDRESS LIST.'
- b. Empty or ineligible units: Any units that appear on the valuation list as vacant should be included in your listing because they may have become occupied since the valuation list was compiled. However, if a unit is marked 'derelict' exclude it from your listing. (Property with no rateable value is often derelict, but you should check with the officer at the Rating Office before excluding such property).

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

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

- c. Selected unit contains more than one household: Occasionally you may find that the selected rateable unit contains more than one household - ie it is a concealed multi-household within a pre-sampled multi-household address. In this case you should follow the procedure described on page 11.

(FOR USE IN SCOTLAND ONLY)

RATEABLE UNIT SELECTION SHEET

Area	1	7	2
Ser. No	0	6	

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

Rateable unit no.	Entries on Rating List	OUTCOME CODE
		Transfer from C&C/C&O sheet

1	House	Gorden	Gr 1	9
2	House	Kane	Gr 2	
3	House	McKendrick	1/1	
4	Service Flat	Haydon	1/2	
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				

IF MORE THAN 22 RATEABLE UNITS,  
CONTINUE ON SAMPLING SHEET

Procedure

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

EXAMPLE

Rateable Unit Selection Table

MULTI OCCUPANCY (MO) INDICATOR = 4

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

Procedure

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

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

B HOUSEHOLD SELECTION PROCEDURE  
[SCOTLAND ONLY]

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

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

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

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

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

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

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

Special Cases

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

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

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

- c. Selected flat contains more than one household: Occasionally you may find that your chosen flat contains more than one household - ie it is a concealed multi-household within a pre-sampled multi-household address. In this case you should follow the procedure described on page 11.

#### Returning Scottish Selection Sheets

Please return all blue and white selection sheets attached to the record(s) of Calls and Outcome for the first completed household at the address, or as soon as possible if no household has been selected.

#### Extra Households per address and quota

SCOTLAND ONLY

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

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

In counting these 21 you should include all addresses already reported on your Weekly Progress Return (S837H) (ie coded 1, 3-7) together with any extra households picked up at multi-household addresses, and all households coded 9. You should include any already returned as empty. However, you should not count in the 21 any addresses returnable as 2 (no sample selected at address), since over the whole sample they would in theory, counterbalance the extra households selected at multi-household addresses.

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

- i. at concealed multi-household addresses you should take the first household that your Concealed Multi-household Selection Sheet instructs you to interview.
- ii. At pre-sampled multi-household addresses you will usually have only one household to interview, but if your Pre-sampled Multi-household Selection Sheet instructs you to interview two households you should take only the first.

#### Interview arrangements

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

#### Queries

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

(FOR USE IN SCOTLAND ONLY)

PRE-SAMPLED MULTI-HOUSEHOLDSELECTION SHEET

Area	1	5	6
Ser. No		0	5

List of Households

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

ProcedureIF MORE THAN 22 HOUSEHOLDS,  
CONTINUE ON SEPARATE SHEET

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

1. GROUND FLOOR, FRONT, L.H. SIDE
2. GROUND FLOOR, BACK
3. GROUND FLOOR, FRONT, R.H. SIDE
4. FIRST FLOOR, FRONT, etc.

NB EXCLUDE empty flats

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

EXAMPLE

SELECTION TABLE (B)

MULTI OCCUPANCY (MO) INDICATOR = 5

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

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



Reference

ORD 25

Interview

date of records

Day	Month		
		8	8
		8	8

INTDAT (4)  
Q0008

STARTDAT (5)  
Q0009

### Family Expenditure Survey

#### Household Schedule

S.838A

Off. Use	C.I.	CASE NO (1)	Q0001
Interviewer Use			
Area	Ser.	Hld.	CHECKDIG (11) Q0002
AREANUMA (2A) Q0003	Ref. No.	0	HHNUMA (3) Q0005
SERNUMA (2B) Q0004	Off. Use	88	LACODEA (5D) Q0007
YEARA (5B) Q0006		LA	1988

**A**

Ring	Person No.	Relationship to HOH	Relationship	Ask HOH who has a non-relative in household. Does he/she contribute on a regular basis to rent, rates or other household expenses?	Sex	Age	Marital Status	Current Full Time Education										Benefit Unit							
								Off. Use	Off. Use	Off. Use	Head of Unit	Wife of head	Spender (16 or over) Do not ring an exception if records received												
01		RECORD 55																							
02	PERS NO (6) Q001	NON REL CON (8) Q003																							
03																									
04																									
05																									
06																									
07																									
08																									
09																									
10																									

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

MASTER SCHEDULE 1988

Page A01

6/1/88

Interviewer: See page 68 for period codes

To all households (Ask hoh or wife)

12 Do any households besides your own household live at \_\_\_\_\_  
 \_\_\_\_\_(quote address)?

OTHHOLIV(17A)  
 Yes →  
 No Q012 →

1
2

- Ask (a)  
 - Go to 13

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

NOHHATAD(18)  
 Q012 A →

--	--

- Go to 14

13 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

14 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

Rooms partly used for business →  
 Rooms used only for business →  
 Bedroom →  
 Kitchen →  
 Scullery used for cooking →  
 Dining/living room →  
 Bathroom →  
 Garage →  
 Other rooms (specify below) →

	(a)	(b)	(c)	OFF USE
	Q.13 or 14(a)	Q.14(b)	Q.14(c)	
	Used solely by household	Rooms shared	Rooms let or sub-let	Line No.
	NOPARB (22) Q014 A1	NOSHPARB(33) Q014 B1	NOSLPARB(43) Q014 C1	1
	NOSOLB (23) Q014 A2	NOSHSOLB(34) Q014 B2	NOSLSOLB(44) Q014 C2	2
	NOBED (19) Q014 A3	NOSHBED(29) Q014 B3	NOSLBED(39) Q014 C3	3
	NOKIT (20) Q014 A4	NOSHKIT(30) Q014 B4	NOSLKIT(40) Q014 C4	4
	NOSFUL (21) Q014 A5	NOSHFUL(31) Q014 B5	NOSLFUL(41) Q014 C5	5
	NOLIVR (21A) Q014 A6	NOSHLIVR(32) Q014 B6	NOSLIVR(42) Q014 C6	6
	NOBATH(24) Q014 A7	NOSHBATH(35) Q014 B7	NOSLBATH(45) Q014 C7	7
	NOGAR (25) Q014 A8	NOSHGAR(36) Q014 B8	NOSLGAR(46) Q014 C8	8
	NOOTR (26) Q014 A9	NOSHOTR(37) Q014 B9	NOSLOTR(47) Q014 C9	9

See 15

**Interviewer Check**

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

INFALLRU (48) Yes → 

1
2

 - Go to 16  
 Q015 1 No → 

2
---

 - Ask 15

(Ask hoh or wife)

15 In addition to the rooms you have just told me about, are there any other rooms in this rateable unit (describe unit from 126)?

ROOMNOOC (60A) Yes → 

1
2

 - Ask (a)  
 Q015 2 No → 

2
---

 - Go to 16

(a) How many other rooms? → 

--	--

 - Ask 16

(Exclude any rooms entered at 13 or 14)

To all households (Ask hoh only)

16 How many years have you lived at this address?

LTRESYRS (60B) 

--	--

 - Ask 17  
 Q016 1 Years →

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

LTRESMTH (60C) 

--	--

 - Ask 17  
 Q016 2 Months (if less than one year) →

RR100PC(67) Q016 3

RR100LA(67A) Q016 4

RR100DK(67G) Q016 5

PERC067A(67B) Q016 6

	OFF. USE	

RR100PR (67H) Q016 7

IMA168 (67I) Q016 8

PERC067H (67J) Q016 9

		OFF. USE

To all households (Ask hoh or wife)

17 Do you rent or do you own this accommodation?

Include caravan mobile home or houseboat

Rents	→	X	- Ask (a)
Owms	→	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 or furnished?	→	3	
		→	4	

(b) Do you own your accommodation

Running prompt	with a mortgage or loan	→	5	Go to 24
	by rental purchase or outright?	→	6	

Caravans, mobile homes and houseboats being purchased to be coded 6 and payments recorded at 79-81

(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 17A)	REPAY OH (62) Q017 D Yes	→	1	Ask (i) - (iii) Go to (c)
	No	→	2	

(i) How much rent did they pay last time?	RENTPAY (63) Q017 D1	→	
---	-------------------------	---	--

(ii) How long did this cover?	PERCO63(64) Enter Q017D2 Period code	→		If code 9 specify period then ask (iii)
		→		

(iii) Does your employer pay this rent on your behalf?	WPRENT (65) Q017 D3 Yes	→	1	- Ask (e) - Specify arrangement and rent paid below then ask (e)
	No	→	2	
		→		
		→		

To renters coded X at 17 or rent free coded 7 at 17(c)

(e) Is your tenancy dependent on your job?	Yes	→	1	Sec 17A
	No	→	2	

INA110(66) Q017E

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

		£	p	
18	How much rent did you actually pay last time (including any rooms you sublet)?	RENT (70) Q018 1		
	Include rent paid for caravan, mobile home and houseboat	RENTDK (70A) Q018 DK 2		1
19	How long did this cover?	PERCO70 (71) Enter Q019 Period code		If code 9, specify period
20	Do you have a rent holiday?	RENTDAY (71A) Yes No Q020		1 - Ask (a) 2 - Go to 21
(a)	For how many weeks of the year?	RENTHOL (72) Q020 A		Ask 21
21	Did you receive any rent rebate/rent allowance/housing benefit in connection with your last rent payment?	RENTREB (73) Yes No Q021		1 - Ask (a) - (d) 2 - Go to 22
(a)	How much was it?	RRAMT (74) Q021 A 1		Ask (b)
	[Exclude rates rebate - see 25(a)(i)]	RRAMTDK (74A) Q021 A 2 DK		1 - Go to (c)
(b)	How long did this cover?	PERCO74 (75) Enter Q021 B Period code		If code 9, specify period
(c)	Did this amount cover			Ask (c)
	rent rebate only?	RRREBCOV (75A) Q021 C		Ask (d)
	rent and rates rebate?			
	D.K.			
(d)	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?	RRRET MET (76) Q021 D		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 D 1 Before After		1 2 - Ask 22
22	Does the rent you mentioned include any services such as lighting, heating, hot water, cleaning, TV licence, lift, gardener or any other service?	RENTINSV (77A) Q022 Yes No		1 - Specify below and enter amount 2 - Ask 23
	Type of service	SERVINCI (78A) Q022 1		Ask 23

To all with rented accommodation (coded X at 17)  
(Ask hoh or wife)

23 Does the rent include rates?

INA 173 (79)  
Q023

Yes  
No

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

Yes  
No

1
2

Ask (a) & (b)  
Go to 25

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

RATESPER (82)  
Enter no. of times  
Q024A

--	--

Ask (b)

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

RATESPAY (81)  
Q024B

--	--

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?

INA 140 (90)  
Q025

Yes  
No

1
2

Ask (a)  
Go to 26

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

DEDRRFLP (91)  
Q025A

Yes  
No

1
2

Ask (i)-(iii)  
Go to 26

(i) How much was deducted?

RRDEDAMT (92)  
Q025A1

--	--

[Exclude rent rebate - see 21(a)]

RRDDAMDK (92A)  
Q025A2 DK

1
---

Go to (iii)

(ii) How long did this cover?

PERCO 92 (93)  
Enter Q025A3  
Period code

--

If code 9, specify period

Ask (iii)

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

RRDDPEDK (93A)  
Q025A4 DK

Before  
After

1
---

Ask (iii)

1
2

Ask 26

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

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

RATESLSR (95)

Q026 Yes  
No

£	p
1	
2	

- Ask (a) - (d)  
- Go to 27

(a) How much was refunded?

RALSRAMT (96)

Q026 A1

--	--

- Ask (b)

RLSRAMDK (96A)

Q026 A2 DK

1
---

- Go to 27

(b) How long did this cover?

PERC096 (97)

Enter Q026 B1

Period code

--

If code 9,  
specify period

RLSRPEDK (97A)

Q026 B2 DK

1
---

- Ask (c)

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

INA127 (98)

Month

Q026 C

--	--

Year 19

--	--

- Ask (d)

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

MTORREB (99)

Q026 D

Yes

No

1
2

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

LASLSRAR (100)

Q026 D1

OFF USE

--	--

PERC100 (101)

Q026 D2

--

To all households (Ask hoh or wife)

27 Is your accommodation connected to the mains sewerage and/or mains water supply? MAINSEW (83) Q027

Yes to both  
Sewerage only  
Water only  
No to both

1
2
3
4

Ask 28  
Go to 29

28 Do you pay separate water and/or sewerage rates? WAOSRATE (84) Q028

Yes  
No

1
2

Ask (a) & (b)  
Go to 29

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

WRATEPER (86) Q028 A Enter no. of times

--	--

Ask (b)

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

WRATEPAY (85) Q028 B

--	--

Ask 29

29 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) Q029 Yes to any  
No to all

1
2

Specify below and enter amounts  
Sec 30

Type of charge and amount	OTHPYAMI (104D) Q029 1
	PERC104D (104G) Q029 2 Enter period code
Type of charge and amount	OTHPYAM2 (104E) Q029 3
	PERC104E (104H) Q029 4 Enter period code

--	--

--

--	--

--

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

Sec 30



To all who own with mortgage, loan or rental purchase (coded 5 at 17(b))

(Ask hoh or wife)

Exclude second mortgages not for the purchase of this accommodation (see 85(a))

30 Did you get the mortgage or loan to purchase your accommodation from a

Running Prompt INA 119 (117) Q030

DNA Coded 1-4 17(a) 6 at 17(b) or 7&8 at 17(c)

£ p

N

- Go to 42

Building Society
Local Authority
Bank
Insurance Company
Other source?

1
2
3
4
5

Ask 31

Specify below and ask 31

31 Did the last mortgage or loan payment you made cover

Prompt interest only? MORTTYPE (118) Q031
interest & capital/principal?

1
2

Ask 32

Go to 35

more than one mortgage, record details of other mortgage in left-hand margin

To those where last payment covered interest only (coded 1 at 31)

(Ask hoh or wife)

32 How much did you pay last time as interest on the mortgage or loan?

MORINPAY (119) Q032

[ ] [ ]

Ask 33

33 How long did this cover?

PERC 119 (120) Enter Q033 Period code

[ ] [ ]

If code 9, specify period

34 Is there an endowment policy covering the repayment of the capital/principal of the mortgage or loan?

MENPOL (121) Q034 Yes No

1
2

Ask (a) - (d) Specify below how principal covered and go to 40

(a) How much was your last premium on the endowment policy?

MENPOLAM (122) Q034A

[ ] [ ]

Ask (b)

(b) How long did this cover?

PERC 122 (123) Q034B Enter Period code

[ ] [ ]

If code 9, specify period

Ask (c)

(c) Has this insurance premium been included in the amount of interest you mentioned earlier (see 32)?

INCININT (124) Q034C Yes No

1
2

Ask (d)

(d) In what year was this insurance taken out?

MENSTYR (123A) Q034D

[ ] [ ]

Go to 40

To those where last payment covered interest and capital/principal (coded 2 at 31)

(Ask hoh or wife)

		£	P	
35 How much was your last instalment on the mortgage or loan?	INTPRPAY (125) Q035			Ask 36
36 How long did this cover?	PERC 125 (126) Enter Q036 Period code			Ask 37 If code 9, specify period
37 How much interest did you pay over the 12 months for which you have figures?	INTL12M (127) Q037 1			Ask (a)
	INL12MDK (127A) Q037 2 DK		1	Go to 38
(a) What dates does this cover?	INA 158 (128) Q037A1 Beginning. Month			Ask 38
	Year. 19			
	INA 159 (129) Ending. Month Q037A2			
	Year. 19			
38 For how many years have you had the mortgage/loan?	INA133 (129A) Q038 1			Ask 39
	MLTRUNDK (129B) Q038 2 DK		1	
39 How many years does it still have to run?	INA 134 (129C) Q039 1			Ask 40
	MLTORNDK (129D) Q039 2 DK		1	

To all who own with mortgage or loan (coded 5 at 17(b))  
(Ask hoh of wife)

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

INA163 (130)  
Q040

Yes  
No  
DK

£	p
1	
2	
3	

Ask 41

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

MOTHAMIN (130A)  
Q041

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

1
2
3
4

Ask (a)-(c)  
Ask (a)-(b) and go to 42  
Go to (c)-(c)  
Go to 42

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

INCSTAMT (132)  
Q041A

--	--

Ask (b)

(b) How long did this cover?

PERC 132 (133)  
Q041B Enter Period code


If code 9, specify period  
Ask (c)

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

INCMPTAMT (135)  
Q041C

--	--

Ask (d)

(d) How long did this cover?

PERC 135 (136)  
Q041D Enter Period code


If code 9, specify period  
Ask (c)

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

INCMSTYR (137)  
Q041E

--	--

19

Ask 42

To all households (Ask hoh or wife)

12

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

INA102 (258) Q042

Yes  
No

£	P
1	
2	

Ask (a)  
Go to 49

(a) Do you pay your telephone bill by

Running Prompt

TELACBB0 (258A) Q042A

Account  
Budgeting Scheme  
Or by some other method?

1	
2	
3	

Go to 43  
Go to 44  
Specify below and go to 43

To those paying by account or some other method (coded 1 or 3 at 42(a))

TELBILAC (262) Q043

43 How much was your last account payment?


Ask (a)

(a) How long did this cover?

PERC262 (262A) Enter Q043A Period code


If coded 9, specify period

Go to 48

To those paying by budgeting scheme (coded 2 at 42(a))

TELBILB (263) Q044

44 How much was your last payment under this scheme?


Ask 45

45 How long did this cover?

PERC263 (263A) Enter Q045 Period code


If coded 9, specify period

46 How much was the charge on your last advice?

TELCHAR (264) Q046


Ask 47

47 How long did this cover?

PERC264 (264A) Enter Q047 Period code


If coded 9, specify period

Ask 48

48 Did anyone outside the household, other than your employer, pay

TELOSCON (261) Q048  
all of the account  
some of the account  
no to both?

Running Prompt

1	
2	
3	

Ask (a) - (b)  
Go to 49

(a) What was your share?

TELSHAMT (261A) Q048A


Ask (b)

(b) How long did this cover?

PERC261A (261B) Enter Q048B Period code


If coded 9, specify period

Ask 49

To all households (Ask hoh or wife)

49 In this accommodation do you have .....

i  
n  
d  
i  
v  
i  
d  
u  
a  
l  
  
P  
r  
o  
m  
p  
t

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

Yes →	1	INA108 (18C
No →	2	Q049 1
Yes →	1	INA164 (18C
No →	2	Q049 2
Yes →	1	INA165 (18
No →	2	Q049 3
Yes →	1	INA166 (18
No →	2	Q049 4

Ask 50

50 In this accommodation do you have central heating by

i  
n  
d  
i  
v  
i  
d  
u  
a  
l  
  
P  
r  
o  
m  
p  
t

electricity?  
Include storage heaters  
  
gas?  
  
solid fuel?  
  
oil?  
  
D.K. fuel

Yes →	1	INA150 (18
No →	2	Q050 1
Yes →	1	INA151 (18
No →	2	Q050 2
Yes →	1	INA153 (18
No →	2	Q050 3
Yes →	1	INA152 (18
No →	2	Q050 4
	1	INA154 (18
		Q050 5

Sec (a)

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 3 months?

Yes →	1	OILPURCH - Ask (i)
No →	2	- Go to 51 Q050A

(i) What was the total expenditure on oil in the last 3 months?

		OILEXP (Q050A1
DK →	1	OILEXPDK - Ask 51 Q050A2

To all households (Ask hob or wife)

51 Do you have electricity supplied to your (part of this) accommodation? **ELEC (195) Q051** Yes → 

1
2

 - Ask (a) No → 

2
---

 - Go to 61

(a) Do you pay for your electricity by

**INA130 (196) Q051A**

**Running Prompt**

Slot meter\* → 

1
2
3
4
5

 - Go to 52  
 Account → 

2
---

 - Go to 53  
 Board Budgeting Scheme → 

3
---

 - Go to 56  
 Or by some other method? → 

4
---

 - Specify below and go to 53  
 (N. Ireland only) C.O.C.D. → 

5
---

 - 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 3 months, that is, since ....., have you received a rebate? **ELECSM (197) Q052** Yes → 

1
2

 - Ask (a) & (b) No → 

2
---

 - Go to 61

(a) How much was the last rebate before any deductions for hire purchase or credit purchase? **ELECMREB (198) Q052A** → 

--	--

 - Ask (b)

(b) How long did this cover? **PERC198 (199) Q052B** Enter 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? **ELECACC (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? **PERC202 (203) Q054** Enter Period code → 


 If code 9, specify period  
 Ask 55

55 What was the date of your last account? (as shown on the account)? **ELACDAT (204) Q055 1** → 


 - Go to 61  
 Year. 19

**ELACDTDK (204A) Q055 2 DK** → 

1
---

 - Go to 61

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

<p>56 How much was your last payment under this scheme?</p>	<p>ELECBBS (200) Q056</p>	<table border="1"> <tr> <td style="width: 50px; text-align: center;">£</td> <td style="width: 50px; text-align: center;">p</td> </tr> <tr> <td style="height: 40px;"></td> <td style="height: 40px;"></td> </tr> </table>	£	p			<p>- Ask 57</p>
£	p						
<p>57 How long did this cover?</p>	<p>PERC200 (201) Enter Q057 Period code</p>	<table border="1"> <tr> <td style="width: 100px; height: 40px;"></td> </tr> <tr> <td style="width: 100px; height: 40px;"></td> </tr> </table>			<p>If code 9, specify period</p> <p>- Ask 58</p>		
<p>58 How much was the charge on your last advice?</p>	<p>ELECCHAR (201A) Q058</p>	<table border="1"> <tr> <td style="width: 50px; height: 40px;"></td> <td style="width: 50px; height: 40px;"></td> </tr> </table>			<p>- Ask 59</p>		
<p><b>Include:</b> units consumed, standing charge, meter rent and installation</p> <p><b>Exclude:</b> rent of appliances, hire purchase, loans and regular maintenance charges</p>							
<p>59 How long did this cover?</p>	<p>PERC201A (201B) Enter Q059 Period code</p>	<table border="1"> <tr> <td style="width: 100px; height: 40px;"></td> </tr> <tr> <td style="width: 100px; height: 40px;"></td> </tr> </table>			<p>If code 9, specify period</p> <p>- Ask 60</p>		
<p>60 What was the date of your last advice (as shown on the advice)?</p>	<p>ELCHDAT (201C) Month Q060 1 Year. 19</p>	<table border="1"> <tr> <td style="width: 50px; height: 40px;"></td> <td style="width: 50px; height: 40px;"></td> </tr> <tr> <td style="width: 50px; height: 40px;"></td> <td style="width: 50px; height: 40px;"></td> </tr> </table>					<p>- Ask 61</p>
	<p>ELCHDTDK (201D) Q060 2 DK</p>	<table border="1"> <tr> <td style="width: 100px; height: 40px; text-align: center;">1</td> </tr> </table>	1	<p>- Ask 61</p>			
1							

To all households (Ask hoh or wife)

61 Do you have gas supplied to your (part of this) accommodation? **GAS (185) Q061**

Yes → 

1
2

 - Ask (a)

No → 

2
---

 - Go to 71

(a) Do you pay for your gas by

**INA128 (186)**

**Running Prompt Q061A**

Slot meter\* → 

1
2
3
4

 - Go to 62

Account → 

2
---

 - Go to 63

Board Budgeting Scheme → 

3
---

 - Go to 66

Or by some other method? → 

4
---

 - Specify t and go t

\*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 3 months, that is, since ....., have you received a rebate? **GASSM(187) Q062**

Yes → 

1
2

 - Ask (a)

No → 

2
---

 - 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) Q062B**

Enter Period code → 


 If code 9, specify p

→ 

--

 - 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) Q064**

Enter Period code → 


 If code 9 specify p

→ 

--

 - Ask 65

65 What was the date of your last account (as shown on the account)? **GAACDAT(194) Q065**

Month → 

--	--

 - Go to

Year. 19 → 

--	--

**GAACDTDK (194A) Q065 2 DK**

→ 

1
---

 - Go to



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

<p>66 How much was your last payment under this scheme? →</p>	<p>GASBBS (190) Q066</p>	<table border="1" style="width: 100%; height: 40px;"> <tr> <td style="width: 50%; text-align: center;">£</td> <td style="width: 50%; text-align: center;">p</td> </tr> </table>	£	p	<p>- Ask 67</p>		
£	p						
<p>67 How long did this cover?</p>	<p>PERC 190 (191) Enter Q067 Period code →</p>	<table border="1" style="width: 100%; height: 60px;"> <tr> <td style="width: 100%; height: 30px;"></td> </tr> <tr> <td style="width: 100%; height: 30px;"></td> </tr> </table>			<p>If code 9, specify per: ← Ask 68</p>		
<p>68 How much was the charge on your last advice? →</p> <p><b>Include:</b> units consumed, standing charge, meter rent and installation</p> <p><b>Exclude:</b> rent of appliances, hire purchase, loans and regular maintenance charges</p>	<p>GASCHAR (191A) Q068</p>	<table border="1" style="width: 100%; height: 40px;"> <tr> <td style="width: 50%;"></td> <td style="width: 50%;"></td> </tr> </table>			<p>- Ask 69</p>		
<p>69 How long did this cover?</p>	<p>PERC 191A (191B) Enter Q069 Period code →</p>	<table border="1" style="width: 100%; height: 60px;"> <tr> <td style="width: 100%; height: 30px;"></td> </tr> <tr> <td style="width: 100%; height: 30px;"></td> </tr> </table>			<p>If code 9, specify per: ← Ask 70</p>		
<p>70 What was the date of your last advice (as shown on the advice)? →</p>	<p>GACHDAT (191C) Q070 1</p> <p>Month</p> <p>Year. 19</p>	<table border="1" style="width: 100%; height: 80px;"> <tr> <td style="width: 50%; height: 40px;"></td> <td style="width: 50%; height: 40px;"></td> </tr> <tr> <td style="width: 50%; height: 40px;"></td> <td style="width: 50%; height: 40px;"></td> </tr> </table>					<p>- Ask 71</p>
<p>71</p>	<p>GACHDTDK (191D) Q070 2 DK →</p>	<table border="1" style="width: 100%; height: 30px;"> <tr> <td style="width: 100%; text-align: center;">1</td> </tr> </table>	1	<p>- Ask 71</p>			
1							

RECORD 25

To all households

Ask all spenders

71 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)

Q071

Yes →

1

- Ask (a) - (c)

No to all →

2

- Go to 72

Exclude:

- cars
- maintenance contracts

RECORD 70

Use separate column for each insurance policy					
		SCPPIN	0(139)		
Per. No.		Q071	1		

Ring Column No.

1	SC	PPIT <sup>2</sup>	NO(139A) <sup>3</sup>	Q071	2	4
---	----	-------------------	-----------------------	------	---	---

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

1	1	1	1
2	SCPTYINS	(139B)	2
3	Q071A	3	3
4	4	4	4

Ask (b) & (c)

Ask (b) - (c)

Specify below and ask (b) & (c)

(b) How much was the last premium? →

		SCPPAMT	(139C)		
		Q071B			

Ask (c)

(c) How long did this cover? Enter Period code →

		PERC139C	(139D)		
		Q071C			

If code 9, specify period

See (d)

If premium covers structure, furniture & contents (coded 3 at 71(a)) and items cannot be separated, ask (d) & (c)

(d) Insured value of structure →

		ACCOMVAL	(146)		
		Q071D			

Ask (c)

(e) Insured value of furniture & contents →

		CONTVAL	(147)		
		Q071E			

Ask 72



To all households

Ask all spenders

RECORD 25

MEDINETC (164)

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

Q074  
Yes →  
No →

1
2

Record details in grid below  
- Go to 75

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

RECORD 72

Per No	1	Ring Line No	2	Type of policy	Insurance company	OFF USE	3	Enter period code	4	If code 0, specify period	Amount Paid		
											£	s	p
	Q074	1	Q074				Q074		Q074				
	(164A)	2	(164B)				(164C)		(164D)			(164E)	
	PNO	3	ITNO				TYPE		164E			AMT	
	MINS	4	MINS				PERC		PERC			MINS	

RECORD 25

To all households **Ask all spenders**

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

TVVIDEO(171A)  
Q075

Yes → 1 - Ask (a) & (b)  
No to all → 2 - Go to 76

Enter children's items under parent's Per. No.  
RECORD 73  
Per. No.

Use separate column for each item

TV PERNO(171B)	Q075 1		
----------------	--------	--	--

Ring Column No.

1 TVITEMNO(171C)	Q075 2	4
------------------	--------	---

(a) Do you have a  
television set? →  
video recorder? →  
home computer? →  
cable T.V.? →

TV TYPE(171D)	Q075A	
1 1 1 1		
2 2 2 2		
3 3 3 3		
4 4 4 4		

- Ask (b)

(b) Do you rent it?  
Yes →  
No →

TVRENTED(171E)	Q075B	
1 1 1 1		
2 2 2 2		

- Ask (i) - (iii)  
- Go to 76

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

Running prompt

TVHOPAY(171F)	Q075B1	
1 1 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)	Q075B2	
----------------	--------	--

- Ask (iii)

(iii) How long did this cover?

Enter Period code →

PERC171G(171H)	Q075B3	
----------------	--------	--

If code 9, specify period

Slot meter (coded 2 at 75(b)(i))

Go to 76

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

Yes →  
No →

TVSMR(171I)	Q075C	
1 1 1 1		
2 2 2 2		

- Ask (i) - (ii)  
- Go to 76

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

TVSMRAMT(171J)	Q075C1	
----------------	--------	--

- Ask (ii)

(ii) How long did this cover?

Enter Period code →

PERC171J(171K)	Q075C2	
----------------	--------	--

If code 9, specify period

To all spenders

Ask all spenders

RECORD 25

TVLIC (265)

Q076

Yes →	1	- Ask (a)
No →	2	- Go to 77

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

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

TVLICFEE (266)

Q076 A

	£	p

- Ask 77

'Blank page'

RECORD 25

To all households

Ask all spenders

MOTORVEH (205)

Q077

Yes →

No →

1
2

Ask (a) - (g)

Go to 79

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

RECORD 74

Use separate column for each vehicle

Per No.

		CPERSNO (206)	Q077 1
--	--	---------------	--------

Ring Column No.

1	2	CITEMNO (206 <sup>3</sup> )	Q077 2
---	---	-----------------------------	--------

(a) Is it a

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
5	5	VEHTYPE (207)	Q077A

Ask (b) - (g)

Specify below and ask (b)

Running prompt

£	p	£	p

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

		CARTAX (208)	Q077B1
--	--	--------------	--------

If nil, code below and go to (d)

Nil →

9		CARTAXNL (208 <sup>9</sup> )	Q077B2 <sup>9</sup>
---	--	------------------------------	---------------------

(c) How long did this cover?

Enter Period code →

		PERC208 (209)	Q077C
--	--	---------------	-------

If code 9, specify period

(d) When did you last renew the Road Fund Tax?

Month

		CARTXDAT (210)	Q077D
--	--	----------------	-------

Ask (d)

Ask (c)

Year. 19

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

		CARINS (211)	Q077E1
--	--	--------------	--------

If nil, code below and go to (g)

Nil →

9		CARINSNL (211 <sup>9</sup> )	Q077E2 <sup>9</sup>
---	--	------------------------------	---------------------

(f) How long did this cover?

Enter Period code →

		PERC 211 (212)	Q077F
--	--	----------------	-------

If code 9, specify period

(g) Do you own the ..... or do you have continuous use of it? (type of vehicle)

Own →

Continuous use →

1		CONTUSE (213) <sup>1</sup>	Q077G 1
2		2	2

See 78

See (h)



To all who have continuous use of a car  
(coded 1 at 77(a) and 2 at 77(g))

77 (cont'd)

Use separate column for each vehicle			
Per. No.			

DNA Others (owned cars:  
all vans, motorcycles,  
mopeds etc)

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

- See 78

Is the car provided for your  
continuous use by

CAR' PROV (214) Q077H

Running  
prompt

your employer  
spouse's employer  
other specify?

1	1	1	1
2	2	2	2
3	3	3	3

Ask 78

Specify below  
and ask 78


To all with cars

DNA Others (vans,  
motorcycles,  
mopeds etc.)

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

- Go to 79

78 Does an employer provide  
you with any petrol for  
private motoring in this  
car?

PETROL (215) Q078

Yes  
No

1	1	1	1
2	2	2	2

Ask (i)

- Go to 79

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

PETRP ROV (215A) Q078 1

Some  
All

1	1	1	1
2	2	2	2

Ask 79

To all households

Ask all spenders

RECORD 25

OLDMVEH (216)

Yes  $\xrightarrow{Q079}$

No  $\xrightarrow{\hspace{1cm}}$

1
2

Ask (a) - (g)  
Ask 80

79 (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?

RECORD 75

Use separate column for each vehicle			
Per No.	OCPERSNO (217)	Q079	1

Ring Column No.

1	OCITEMNO (217A)	Q079	2 <sup>4</sup>
---	-----------------	------	----------------

(a) Was it a

Running prompt

- Car  $\xrightarrow{\hspace{1cm}}$
- Van  $\xrightarrow{\hspace{1cm}}$
- Motor cycle  $\xrightarrow{\hspace{1cm}}$
- Moped  $\xrightarrow{\hspace{1cm}}$
- Other motor vehicle specify?  $\xrightarrow{\hspace{1cm}}$

1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	OCARTYPE (218)	Q079A	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)

OCARTAX (219)	Q079	B1	
9	OCARTXNL (219A)	Q079	B2 <sup>9</sup>

If nil, code below and go to (c)

(c) How long did this cover?

Enter Period code  $\xrightarrow{\hspace{1cm}}$

PERC 219 (220)	Q079	C	
----------------	------	---	--

If code 9, specify period

Ask (d)

(d) When did you last renew the Road Fund Tax?

Month

OCTAXDAT (221)	Q079	D	
----------------	------	---	--

Ask (c)

Year. 19

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

OCARINS (222)	Q079	E1	
9	OCARINNL (222A)	Q079	E2 <sup>9</sup>

If nil, code below and go to (g)

(f) How long did this cover?

Enter Period code  $\xrightarrow{\hspace{1cm}}$

PERC 222 (223)	Q079	F	
----------------	------	---	--

If code 9, specify period

Ask (g)

(g) Did you own the ..... or did you have continuous use of it? (type of vehicle)

- Own  $\xrightarrow{\hspace{1cm}}$
- Continuous use  $\xrightarrow{\hspace{1cm}}$

1	OCCONT (224)	Q079	G 1
2	OCCONT (224)	Q079	G 2

Sec 80 21

To all households

Ask all spenders

RECORD 25

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

VETAXREF (241)

Yes  $\xrightarrow{Q080}$ 

1
2

 Ask (a)

No  $\xrightarrow{\hspace{2em}}$ 

1
2

 Go to 81

RECORD 84

Use separate column for each refund							
Per No. $\xrightarrow{\hspace{1em}}$		VTRPERNO (240A) Q080 1					
£ p   £ p   £ p   £ p							
(a) How much was (were) the refund(s)? $\xrightarrow{\hspace{1em}}$		VETXR FAM (242) Q080A					
- Ask 81							

To all spenders who own or have owned a vehicle during the last 12 months (coded 1 at 77(g) or 79(g))

DNA → N - Go to 83

RECORD 76

Use separate column for each vehicle					
Per No. →		CPERSNO	(226)	Q08	1 1

Ring Column No.	1	CPIT <sup>2</sup> EMNO	(226A <sup>3</sup> )	Q08	1 2 <sup>4</sup>
-----------------	---	------------------------	----------------------	-----	------------------

81 During the last 3 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?

Yes →	1	CAR <sup>1</sup> PUR	(226 <sup>1</sup> B)	Q08	1 3 1
No →	2				2

**Include:** Bank overdrafts  
**Exclude:** Loan from organisation, bank, finance house or H.P. (enter at 84-87)

(a) Was it a  Running prompt	Car →	1	1	1	1
	Van →	2	2	2	2
	Motor cycle →	3	3	3	3
	Moped →	4	4	4	4
	Other motor vehicle specify? →	5	CPTYPE	(227)	Q08

(b) Was it new or secondhand?	New →	1	1	1	1
	Secondhand →	2	NOCARP	(228)	Q08

(c) When was the vehicle acquired?	Month		CAR PDAT	(229)	Q08	1C
	Year. 19					

(d) What was the total cash price of the vehicle before deducting anything for part exchange or trade in?						
	£ p   £ p   £ p   £ p	CARP AMT	(230)	Q08	1D	

81 (cont'd)

DNA → 

N
---

 - Go to 83

Use separate column for each vehicle

Per No. → 

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

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

Yes → 

1	CARPTINS	(230A)	Q08	E	1
2	2	2	2	2	2

 - Ask (i)  
No → Go to (f)

(i) How much was included for

£      p i £      p i £      p i £      p

Running prompt

Road fund tax → 

		CPCTAXAM	(232)	Q08	IE	
		CPINSAMT	(234)	Q08	IE	

 - Ask (f)  
Vehicle Insurance? →

(f) Was anything allowed for part exchange or trade in?

Yes → 

1	CPARTEX	(234A)	Q08	IF	1
2	2	2	2	2	2

 - Ask (i)  
No → Go to 82

(i) How much was allowed?

		CPAR AMT	(235)	Q08	IF	
--	--	----------	-------	-----	----	--

 - Ask 82

To all spenders who own or have owned a vehicle during the last 12 months (coded 1 at 77(g) or 79(g))

RECORD 95

DNA → 

N
---

 - Go to 83

Use separate column for each vehicle							
Per No. →			CSPEERSNO	(235A)	Q08	2	1

Ring Column No.							
	1		CSIT <sup>2</sup> EMNO	(235B <sup>3</sup> )	Q08	2	2 <sup>4</sup>

82 During the last 3 months, that is since ....., have (any of) you sold any vehicles belonging to you (excluding the trade-in/part exchange you mentioned earlier)?

Yes →							
No →	1		CARS <sup>1</sup> SOLD	(236 <sup>1</sup> )	Q08	2	3 <sup>1</sup>
	2			2			2

Ask (a)-(c)  
Go to 83

(a) Was it a

Car →							
Van →	1		1		1		1
Motor cycle →	2		2		2		2
Moped →	3		3		3		3
Other motor vehicle specify? →	4		4		4		4
	5		CSOLDTYP	(236A)	Q08	2	A

Ask (b)&(c)

Specify below and ask (b)&(c)

(b) When did you sell the vehicle?

Month							
			CSOLDDAT	(237)	Q08	2	B
Year. 19							

Ask (c)

(c) Did you receive payment by cash, cheque or giro?

Yes →							
No →	1		CRECPAY	(238)	Q08	2	C
	2			2			2

Ask (i)  
Go to 83

£ p | £ p | £ p | £ p

(i) How much did you receive? →

			CREC AMT	(239)	Q08	2	C1

Ask 83

To all households

Ask all spenders

RECORD 25

83 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)

Q083

Yes → 1 [Record details in grid below]

No → 2 [Go to 84]

Exclude: payments for railcards, school bus or train passes (see 109) and O.A.P. concessionary fare passes (see 60 on income schedule)

RECORD 85

Per. No. 1	Ring Line No. 2	Mode of transport e.g. rail only, bus only rail/bus/tube combined	Enter period code 3	If code 9, specify period	Amount paid			OFF. USE 5
					£	4	p	
Q08	1 Q08		Q08				Q083	
(245A)	2 (245B)		(245C)				(245E)	
ERN0	3 EMN0		245D		MT		ODE	
STP	4 STIT		PERC		STA		STM	

Ask 84

C

To all households

Ask all spenders

32

RECORD 25

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

CREDCARD(270B)  
 Yes Q084 → 

1
2

  
 No →

Ask (a)  
Go to 85

RECORD 59

Use separate column for each spender with card(s)

CREDPNO (270A) Q084 1 Per. No.																			
(a) How many do you have NOCREDCD (270C) Q084 A →																			

Ask 85

Refer informant to Prompt Card A

RECORD 25

85 Are (any of) you at present making regular payments to any of the organisations shown on this card?

LOAN(271) Yes → 

1
2

  
 Q085 No →

Ask (a)  
Go to 86

Suggest consulting agreement or payments card before asking 85

RECORD 77

Per No. →

Use separate column for each arrangement


Ring Column No.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

(a) Are the payments to:

Individual

- a finance house? →
- an organisation granting a second mortgage? →
- A bank for a personal loan (that is a loan given originally for specific goods or services) →
- a building society for a personal loan, (that is a loan given originally for specific goods or services)? →
- your employer as repayments of a loan? →
- loan from the DHSS social fund? →

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

Ask (b) - (m)

(b) How much was the loan, excluding any interest you paid? →


Ask (c)

(c) How much was your last payment? →


Ask (d)

(d) How long did this cover? →

Enter Period code →


If code 9, specify period

Ask (e)



To all spenders with instalments  
(coded 1 - 6 at 85(a))

85 (cont'd)

Per. No.

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

(e) When did you obtain the loan?

Month

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

Ask (f)

Year 19

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

(f) What item or services did you obtain with the loan?

Ask (g)

Use a separate column for each item or service and ask (g) - (m) for each item

OFF. USE							
OFF. USE							

(g) Was the item new or second hand

New →  
S/hand →  
DNA →

1							
2							
3							

Ask (b)

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

Ask (i)

(i) How much was the cash price of ..... (the goods or service) including any down payment or part exchange?


Ask (j)

(j) How much was allowed in part exchange?


Ask (k)

(k) How much, if anything, did you have to put down in addition to the amount borrowed excluding any part exchange?


Ask (l)

To all with loan from DHSS social fund (coded 6 at 85(a))

DNA. Others →

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

Go to 86

(l) Do you pay the loan repayments by

deduction from benefit? →  
direct payment to DHSS? →

1							
2							

Ask (m)

Go to 86

(m) Which benefit?


34

RECORD 25

To all households

Ask all spenders

86 Are (any of) you at present paying instalments under a hire purchase or credit sale agreement?

HIREPURC (284)

Yes → 1  
No → Q086 1 → 2

Ask 86A then (a) - (i)

86A Have (any of) you made a down payment on anything on which you have not yet paid an instalment?

HPINSTNP (284A)

Yes → 1  
No → Q086 2 → 2

Ask (a) - (g)

To all answering 'Yes' (Code 1) at 86 and/or 'Yes' (Code 1) at 86A

RECORD 78

DNA. Others

N

Go to 87

Suggest consulting agreement or payments card before asking (a) - (i)

Use separate column for each arrangement

Per No. →

Ring Column No.

		HPPE RSN0 (287)	Q08 6 3
1		HPIT <sup>2</sup> EMNO (287A) <sup>3</sup>	Q08 6 4 <sup>4</sup>

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

--	--	--	--

Ask (b)

OFF. USE		HPITEMA (288)	Q08 6A1
OFF. USE		HPQUAL (288A)	Q08 6A2

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

--	--	--	--

Ask (c)

(c) Did you buy it new or secondhand?

New →  
S/hand →  
DNA →

1		HPNEWOLD (289) <sup>1</sup>	Q08 6C 1
2		2	2
3		3	3

Ask (d)

(d) How much was the cash price of ..... (the goods or service) including any down payment or part exchange?

		HPCASHPR (290)	Q08 6D
--	--	----------------	--------

Ask (e)

(e) When did you obtain the item or service?

Month

Year 19

		HPDAT (293)	Q08 6E
--	--	-------------	--------

Ask (f)

(f) How much was allowed in part exchange?

		HPPARTEX (294)	Q08 6F
--	--	----------------	--------

Ask (g)

(g) How much was the down payment (excluding part exchange)?

		HPDEPOS (295)	Q08 6G
--	--	---------------	--------

Ask (h)

(h) How much was the last instalment?

		HPINSTAL (291)	Q08 6H
--	--	----------------	--------

Ask (i)

(i) How long a period did this cover?

Enter period code →

		PERC 291 (292)	Q08 6I
--	--	----------------	--------

If code 9, specify period

Ask 87

To all households

Ask all spenders

RECORD 25

Refer Informant to Prompt Card B

CLUB (285)

87 Do (any of) you at present have any of the arrangements shown on this card?

Yes Q087 → 

1
2

 Ask (a) - (d)  
No → Go to 88

Use separate column for each arrangement

Per No.

Ring Column No.

Individual Prompt

Budget or option accounts? →	1	1	1	1
Chargecards? →	2	2	2	2
A club run by a shop? →	3	3	3	3
A Mail Order club as an agent or through a friend or relative? →	4	4	4	4
Other Mail Order organisation? →	5	5	5	5
A Check trader? →	6	6	6	6
Loan from other person or organisation? →	7	7	7	7

Ask (b) - (d)

Specify below and ask (b) - (d)

£ p | £ p | £ p | £ p

(b) How much was your last payment? →

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

Ask (c)

(c) How long did this cover? Enter period code →


If code 9, specify period

Ask (d)

(d) Have (any of) you obtained any goods during the last month, i.e. since ..... (the day exactly a calendar month before interview) from (name of firm)?

Yes →

No →

Y	Y	Y	Y
X	X	X	X

Record details over page

Go to 88

Q.87 (cont'd)

36

If "Yes .....Y" at 87(d), complete grid below using a separate line for each item obtained.

RECORD 80

Per No	Ring Line No	Code from 91	Description of goods obtained. Itemise as far as possible. If clothing state whether for adult or child. Give sex. If child, give age.	Date obtained		Cash price		OFFICE USE	
				Day	Month	£	p		
	1								
	2								
	3								
	4								
	5								
	6	7D1			7D4		7D5	7D6	7D7
	7	Q08			Q08		Q08	Q08	Q08
	8	(300E)			(300F)		(300G)	(300H)	(300I)
	9	GPN0			DAT		SCOS	IPUT	QUAL
	10	CLUB			CLUB		CLUB	CLUB	CLUB
	11								
	12								
	13								
	14								
	15								

To all households

Ask all spenders

RECORD 25

SECDWELL (301)

88 Do (any of) you have a second dwelling?

Yes  $\xrightarrow{Q088}$   
No  $\longrightarrow$

f	p
	1
	2

Ask (a)  
Go to 89

0

SEDWINUK (301A)

(a) Is the second dwelling in England, Scotland, Wales or Northern Ireland?

Yes  $\xrightarrow{Q088A}$   
No  $\longrightarrow$

	1
	2

Ask 89 - 92 for second dwelling  
Ask 89

C

To all households

Ask all spenders

38 RECORD 25

CHINSTAL (246)

89 In the last 12 months, that is since ..... have (any of) you paid for central heating to be installed?

Q089

Yes	1	Ask (a) - (f)
No	2	Go to 90

Include as main dwelling: Expenditure on home to which household member(s) are moving

RECORD 35

Use separate column for main/second dwelling

1	1	OFF. USE	DWCHPN Q089
---	---	----------	-------------

(a) Was this work carried out at

your main dwelling?	1	1	} DWCHMDS Ask (b) Q089A
your second dwelling?	2	2	

(b) Was the central heating

Running Prompt

Gas fired	1	1	} DWCHTYPE Q089B Ask (c)
Electric, incl. storage heaters & under floor	2	2	
Oil fired	3	3	
Solid fuel?	4	4	

(c) 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	1	1	} DWCHWHO (Q089C) Ask (d)
Do-it-yourself only	2	2	
Some of each	3	3	

(d) During the last 12 months, how much in total did you pay, excluding any interest paid on loans?

Paid to someone else	£	p	£	p	} DWCHCON (Q089D1) Ask (e) DWCHDIY (Q089D2)
Paid for do-it-yourself					

(e) Did you pay by

Running prompt

Cash (cheque, coin or giro)	1	1	} DWCHHPY Q089E Ask (f)
Credit card	2	2	
Loan	3	3	
Other instalment credit	4	4	
Part cash, part loan?	5	5	

(f) Has/will any of this be reclaimed as a business expense?

Yes	1	1	} DWCHBUS (Q089F) Ask (i) Go to 90
No	2	2	

(i) How much was/will be reclaimed?

				} DWCHBAMT (Q089G) Ask 90

To all households

Ask all spenders

RECORD 25

90 In the last 12 months, that is since ..... have (any of) you paid for central heating repairs, servicing or maintenance of central heating?

CHREPAIR (247)  
Q090

Yes	1	- Ask (a) - (c)
No	2	- Go to 91

Include as main dwelling: Expenditure on home to which household member(s) are moving

Use separate column for main/second dwelling

RECORD 36

1	1	OFF. USE	DCHRPN (Q090)
---	---	----------	---------------

(a) Was this work carried out at

your main dwelling? —  
your second dwelling? —

1	1	} DCHRMDSD Ask (b) Q090
2	2	

(b) 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 —  
Do-it-yourself only —  
Some of each —

1	1	} DCHRWHO (Q090) Ask (c)
2	2	
3	3	

(c) During the last 12 months, how much in total did you pay, excluding any interest paid on loans?

Paid to someone else —  
Paid for do-it-yourself —

	£	p	£	p	
Paid to someone else					} DCHRCON (Q090) Ask (d) DCHRDIY (Q090)
Paid for do-it-yourself					

(d) Did you pay by

Cash (cheque, coin or giro) —  
Credit card —  
Loan —  
Other instalment credit —  
Part cash, part loan? —

1	1	} DCHRHWPI (Q090) Ask (e)
2	2	
3	3	
4	4	
5	5	

(e) Has/will any of this be reclaimed as a business expense?

Yes —  
No —

1	1	} DCHRBUS (Q090) Ask (i) Go to 91
2	2	

(i) How much was/will be reclaimed?

				DCHRBMAT (Q090) Ask 91
--	--	--	--	---------------------------

Running prompt

To all households

Ask all spenders

Refer Informant to Prompt Card C

RECORD 25

91 In the last 12 months, that is since ..... have (any of) you paid for any improvements, extensions or enlargements such as those shown on this card, for this dwelling (or for a second dwelling)?

EXTIMPS (248)

Yes  $\xrightarrow{Q091}$ 

1
---

 - Ask (a) - (c)  
 No  $\longrightarrow$ 

2
---

 - Go to 92

Include as main dwelling: Expenditure on home to which household member(s) are moving

RECORD 37

Use separate column for main/second dwelling

1	1	OFF. USE	DEXTPN0 Q091 1
---	---	----------	----------------

(a) Was this work carried out at

your main dwelling?  $\longrightarrow$   
 your second dwelling?  $\longrightarrow$

1	1	} DEXTMDS0 ( Ask (b) Q091
2	2	

(b) 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  $\longrightarrow$   
 Do-it-yourself only  $\longrightarrow$   
 Some of each  $\longrightarrow$

1	1	} DEXTWHO (2 Ask (c) Q09
2	2	
3	3	

(c) During the last 12 months, how much in total did you pay, excluding any interest paid on loans?

Paid to someone else  $\longrightarrow$   
 Paid for do-it-yourself  $\longrightarrow$

	£	p	£	p	
Paid to someone else					} DEXTCON (2 Q091 Ask (d) DEXTDIY (2 Q091C
Paid for do-it-yourself					

(d) Did you pay by

Running prompt

Cash (cheque, coin or giro)  $\longrightarrow$   
 Credit card  $\longrightarrow$   
 Loan  $\longrightarrow$   
 Other instalment credit  $\longrightarrow$   
 Part cash, part loan?  $\longrightarrow$

1	1	} DEXTHWPY ( Ask (c) Q091
2	2	
3	3	
4	4	
5	5	

(e) Has/will any of this be reclaimed as a business expense?

Yes  $\longrightarrow$   
 No  $\longrightarrow$

1	1	} DEXTBUS ( Ask (i) Q091 Go to 92
2	2	

(i) How much was/will be reclaimed?

					DEXTBAMT ( Ask 92 Q091
--	--	--	--	--	------------------------



List of examples shown on Prompt Card C
--

Building extension

Garden patio

Kitchen or bathroom unit

Double glazing

Wall insulation

Room conversion

Garage

Car port

Concrete base for vehicle

Driveway

Garden shed

Garden fence

Any other enlargements,  
extensions or improvements  
of £50.00 or more

To all households

Ask all spenders

Refer Informant to Prompt Card D

92 In the last 12 months, that is since ..... have (any of) you paid for any improvements, extensions or enlargements such as those shown on this card, for this dwelling (or for a second dwelling)?

RECORD 25

MAINT (249)  
 Q092  
 Yes → 

1
---

 - Ask (a) - (c)  
 No → 

2
---

 - Go to 93

Include as main dwelling: Expenditure on home to which household member(s) are moving

RECORD 38

Use separate column for main/second dwelling

1	1	OFF. USE	DMNTPNo( Q092 1
---	---	----------	-----------------

(a) Was this work carried out at your main dwelling? → 

1	1
2	2

 } DMNTPNo( Q092 1  
 your second dwelling? → 

2	2
---	---

 } Ask (b) Q092A

(b) 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 → 

1	1
2	2
3	3

 } DMNTWHO(21  
 Do-it-yourself only → 

2	2
---	---

 } Ask (c) Q092  
 Some of each → 

3	3
---	---

(c) During the last 12 months, how much in total did you pay, excluding any interest paid on loans?  
 Paid to someone else → 

£	p	£	p

 } DMNTCON(24 Q092.  
 Paid for do-it-yourself → 

--	--	--	--

 } Ask (d)  
 DMNTDIY(24 Q092C

(d) Did you pay by  
 Cash (cheque, coin or giro) → 

1	1
2	2
3	3
4	4
5	5

 } DMNTHWPY(2  
 Credit card → 

2	2
---	---

 } Ask (c) Q092  
 Loan → 

3	3
---	---

  
 Other instalment credit → 

4	4
---	---

  
 Part cash, part loan? → 

5	5
---	---

(e) Has/will any of this be reclaimed as a business expense?  
 Yes → 

1	1
2	2

 } DMNTBUS(21  
 No → 

2	2
---	---

 } Ask (i) Q092  
 Go to 93

(i) How much was/will be reclaimed? → 

--	--	--	--

 } DMNTBAMT(2  
 Ask 93 Q092E  
 42

Running prompt

List of examples shown  
on Prompt Card D

Interior painting

Exterior painting

Repairs or replacement of:

Guttering

Roof

Door

Windows (excluding double glazing)

Walls (e.g. brickwork, stucco)

Plumbing

Electricity system (including rewiring)

Plaster

Woodwork

Any other repairs, replacements or  
decorations of £50.00 or more

To all households

Ask all spenders

RECORD 25

Refer Informant to Prompt Card E

93 In the last 12 months, that is since ..... have (any of) you paid for any of the items shown on this card in connection with the purchase or sale of property?

FEESPPTY (250)

Yes Q093

No

1
2

Ask (a) - (c)  
Go to 94

RECORD 39

Use separate column for each item							
1	2	3	4				

FEESPNO (25 Q093 1)

FEESINO (25 Q093 2)

(a) What type of item was paid for?

- Conveyancing fees
- Estate agents' fees
- Surveyors' fees
- Combined fees
- Moving furniture
- Storage of furniture

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

FEESTYPE (: Q093A Ask (b))

(b) Was this for your

- Main dwelling?
- Permanent second dwelling?
- Other dwelling?

	£	p	£	p	£	p	£	p
1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3

FEESMDSD Ask (c) Q0 Specify below and ask (c)

(c) During the last 12 months, how much did you pay, excluding any interest paid on loans?

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

FEESAM (25 Q093C Ask (d))

(d) Was this for the purchase and sale of property, sale only or purchase only?

- Purchase and sale?
- Sale only?
- Purchase only?

1	1	1	1
2	2	2	2
3	3	3	3

FEESPUSA (Ask (e) Q09)

(e) Has/will any of this be reclaimed as a business expense?

- Yes
- No

1	1	1	1
2	2	2	2

FEESBUS (: Ask (i) Q00 Go to 94)

(i) How much was/will be reclaimed?

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

FEESBAM Ask 94 Q09

To all households

Ask all spenders

RECORD 25

Refer Informant to Prompt Card F

94 In the last 3 months, that is since ..... have (any of) you paid for any furniture such as the examples shown on this card?

FURNITRE ( Q094

Yes →	1	- Ask (a) & (b)
No →	2	- Go to 95

(a) During the last 3 months, how much in total did you pay, excluding any interest paid on loans? \_\_\_\_\_

£	p	FURNAM ( : Q094A - Ask (b)

(b) Did you pay by

Running prompt

Cash (cheque, coin or giro) →	1	FURNHWPY Q094B Ask 95
Credit card →	2	
Loan →	3	
Other instalment credit →	4	
Part cash, part loan? →	5	

Refer Informant to Prompt Card G

95 In the last 3 months, that is since ..... have (any of) you paid over £50 in total for any carpets, carpeting or any of the items shown on this card?

CARPETS ( Q095

Yes →	1	- Ask (a) & (b)
No →	2	- Go to 96

Include: fitting charge for carpeting

(a) During the last 3 months, how much in total did you pay, excluding any interest paid on loans? \_\_\_\_\_

£	p	CPETAM ( : Q095A - Ask (b)

(b) Did you pay by

Running prompt

Cash (cheque, coin or giro) →	1	CPETHWP Q095B Ask 96
Credit card →	2	
Loan →	3	
Other instalment credit →	4	
Part cash, part loan? →	5	

List of examples shown  
on Prompt Card F

Tables

Chairs

Beds

Cupboards

Wall units

Armchairs

Settees

Bunk beds

Dressing tables

Any other furniture  
costing £50 or more

List of examples shown  
on Prompt Card G

Carpets

Carpeting

Carpet tiles

Rugs

Mats

Any other carpet items  
costing £50 or more

To all households

Ask all spenders

RECORD 25

96 During the last 3 months, that is since ..... have you paid for part or all of the cost of any holiday that you have already taken or are about to take in the future?

HOLPAID (253)

Yes Q096

No

1
2

- Ask 97

- Go to 103

RECORD 108

Use separate column for each holiday

Per No.

Ring Column No.

		HOLPNO (253A) Q096 1	
--	--	----------------------	--

1	HOLIND (253B) Q096 2 4		
---	------------------------	--	--

97 Was/is it a package holiday?

**Definition:**  
travel to holiday point and accommodation combined as a minimum, i.e. these items cannot be paid for separately.  
Self-catering package holidays should be included as a package holiday.

Yes

No

1	HLPACK (253C) Q097 1		
2			

- Go to 98

- Ask (a)

(a) Was it/will it be

at a hotel or boarding house (other than package)?  
a self-catering or camping holiday (other than package)?  
other?

1	1	1	1
2	2	2	2
3	3	3	3

- Go to 101

- Go to 102

- Go to 103

To all with package holiday (coded 1 at 97)

DNA. Others

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

- See 101

98 Did the holiday/will the holiday last

for less than seven days?  
for seven days or more?

1	HLPKDAYS (254) Q098 1		
2			

- Ask 99

99 Was the holiday/will the holiday be in

UK?

Eire?

Other

1	HLPKWHER (254A) Q099 1		
2			
3			

- Ask 100

100 During the last 3 months how much have you actually spent on the cost of the package only?

Nil

	HLPKAMT (254B) Q100 1		
1	HLPKAMNL (254C) Q100 2 1		

- Ask (a)

- See 101

(a) Did you pay by

Cash (cheque, coin or giro)  
Credit card  
Loan  
Other instalment credit  
Part cash, part loan?

Running prompt

1	HLPKHWPY (254D) Q100A 1		
2			
3			
4			
5			

- See 101

Use separate column for each holiday							

Per. No.

To all with holiday at hotel or boarding house (coded 1 at 97(a))

DNA. Others

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

Sec 102

101 Was the holiday/will the holiday be in

UK? →  
Eire? →  
Other →

1	HLHB <sup>1</sup> WHER	(255) <sup>1</sup> Q101	1
2	2	2	2
3	3	3	3

Ask (a) & (b)

Sec 102

(a) During the last 3 months, how much did you actually spend on accommodation only, but including food if it was part of the accommodation charge? →

£	p	£	p	£	p	£	p
		HLHB	AMT	(255A)	Q10	1A	

Ask (b)

(b) Did you pay by

Running prompt  
Cash (cheque, coin or giro) →  
Credit card →  
Loan →  
Other instalment credit →  
Part cash, part loan? →

1	HLHB <sup>1</sup> HWPY	(255B) <sup>1</sup> Q10	1B	1
2	2	2	2	2
3	3	3	3	3
4	4	4	4	4
5	5	5	5	5

Sec 102

To all with self-catering holiday (coded 2 at 97(a))

DNA. Others

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

Sec 103

102 Was the holiday/will the holiday be in

UK? →  
Eire? →  
Other →

1	HLSC <sup>1</sup> WHER	(256) <sup>1</sup> Q102	1
2	2	2	2
3	3	3	3

Ask (a) & (b)

Go to 103

(a) During the last 3 months, how much did you actually spend, on accommodation only, including campsite fees and hostel charges? →

		HLSC	AMT	(256A)	Q10	2A1	
Nil →	1	HLSC <sup>1</sup> AMNL	(256B)	Q10	2A2	1	

Ask (b)

Go to 103

(b) Did you pay by

Running prompt  
Cash (cheque, coin or giro) →  
Credit card →  
Loan →  
Other instalment credit →  
Part cash, part loan? →

1	HLSC <sup>1</sup> HWPY	(256C) <sup>1</sup> Q10	2B	1
2	2	2	2	2
3	3	3	3	3
4	4	4	4	4
5	5	5	5	5

Ask 103





To all households

Ask all spenders

RECORD 25

103 Do (any of) you have either a current account or a bank budget account?

BANKACS (309)  
 Yes  $\xrightarrow{Q103}$ 

1
2

 - Ask (a) & (b)  
 No  $\longrightarrow$ 

2
---

 - Go to 104

RECORD 81

Use separate column for each account

Per. No.

BANKPNO (309A) Q10 3 1

Ring Column No.

1 BANK<sup>2</sup>TTNO (309B)<sup>3</sup> Q10 3 2<sup>4</sup>

(a) Do you have

a current account?  $\longrightarrow$   
 a bank budget account?  $\longrightarrow$

1	BACCTYPE (309C) <sup>1</sup>	Q10 3A	1
2	2	2	2

Ask (b)

(b) Have you paid any bank service charges on any of these accounts in the last 3 months?

Yes  $\longrightarrow$   
 No  $\longrightarrow$

1	BANKSERC (310) <sup>1</sup>	Q10 3B	1
2	2	2	2

Ask (i) & (i)  
 Go to 104

(i) How much did you pay excluding interest, in the last 3 months, that is since .....

£ p | £ p | £ p | £ p

BANSCAMT (312) Q10 3B1

Ask (ii)

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

Yes  $\longrightarrow$   
 No  $\longrightarrow$

1	BSCBUSP (313) <sup>1</sup>	Q10 3B2	1
2	2	2	2

Ask (ai)  
 Go to 104

(ai) About what proportion would be for business?

%

BSCBUSPR (315) Q10 3B3

Ask 104



To all households

**All spenders**

104 (Apart from any of the items I have already asked you about), do (any of) you pay for anything by standing order or direct debit through a bank, bank budget account, National (Post Office) Giro or building society?

RECORD 25

BANKSTOR(316)

Yes Q104

No

1
2

Record details in grid below  
Go to 105

RECORD 82

Per No.	Ring line No.	Purpose (Automobile Association membership, etc.)	OFF. USE		Enter period code	If code 9, specify period	£ p	
	1							
	2							
	3							
	4							
	5							
	6		3	4	5		6	
	7		4	4	4		4	
	8		Q10	Q10	Q10		Q10	
	9		(316A)	(318)	(319)		(317)	
	10		RPNO	RQVA	317		RAMT	
	11		RITN					
	12							
	13							
	14							
	15							

To all households

All spenders

RECORD 25

105 Have (any of) you or your children under 16 acquired anything free of charge on prescription during the past seven days ending yesterday?

PRES (319A)

Yes Q105 → 

1
2

 - Ask (a) & Go to 1

No →

RECORD 91

Use separate column for each person receiving free items on prescription

(a) Who acquired the items? → Per. No.

		PRES PNO	(319B)	Q105A					

 - Ask (b)

(b) How many items did they acquire? →

		PRES NO	(320)	Q105B					

 - Ask 10

RECORD 25

106 Have (any of) you or your children under 16 had any free welfare milk during the past seven days ending yesterday?

FREEWELF (321)

Yes Q106 → 

1
2

 - Ask (a) & Go to

No →

RECORD 92

Use separate column for each person receiving free welfare milk

(a) Who received the milk? → Per. No.

		WELFPNO	(321A)	Q106A					

 - Ask (b)

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

		WELFMILK	(322)	Q106B					

 - Ask 10

RECORD 25

107 Have (any of) you or your children under 16 had any free school milk during the past seven days ending yesterday?

FRSCMILK (322A)

Yes Q107 → 

1
2

 - Ask (a) & See 10

No →

RECORD 93

Use separate column for each person receiving free school milk

(a) Who received the milk? → Per. No.

		SCHMPNO	(322B)	Q107A					

 - Ask (b)

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

		SCHMILK	(323)	Q107B					

 - See 10

To all with children at state schools

53 RECORD 25

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

DNA. No state school children  N - Go to 110

SCHMEALS (324) Yes  1 - Ask (a)-(d)

Q 108 No  2 - Go to 109

RECORD 94

Use separate column for each child receiving school meals

(a) Which child? <input type="checkbox"/>	Per. No. of child <input type="checkbox"/>	SMP ERNO (324A) Q10 8A	- Ask (b)
(b) How many meals has each child had? <input type="checkbox"/>		SMNO HDLW (324B) Q10 8B	- Ask (c)
(c) Were the meals free? Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	1 SMP FREE (324C) Q10 8C 1	- Go to 109
	No <input type="checkbox"/>	2	- Ask (d)
(d) During the 7 days ending yesterday did you pay for any of the meals? Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	1 SMPAIDLW (328) Q10 8D 1	- Ask (i) & (j)
	No <input type="checkbox"/>	2	- Go to 109
(i) How much did you pay for each child during the 7 days ending yesterday? <input type="checkbox"/>		SMPD AMT (329) Q10 8D1	
(ii) How many meals did this cover? <input type="checkbox"/>		SMNOFDLW (330) Q10 8D2	- Ask 109

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

RECORD 25

109 Has/have you child(ren) at State school travelled to or from school by bus or train during the past 7 days ending yesterday?

SCHTRAV (331) Yes  1 - Ask (a)-(d)

Q109 No  2 - Go to 110

RECORD 96

Use separate column for each child travelling by bus or train

(a) Which child? <input type="checkbox"/>	Per. No. of child <input type="checkbox"/>	SCTRPNO (331A) Q10 9A	- Ask (b)
(b) Did he/she travel free? Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	1 SCTRFREE (331B) Q10 9B 1	- Go to 110
	No <input type="checkbox"/>	2	- Ask (c)
(c) During the 7 days ending yesterday did you actually pay for any of the travel? Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	1 STPAIDLW (331C) Q10 9C 1	- Ask (i) & (j)
	No <input type="checkbox"/>	2	- Go to 110
(i) How much did you pay for each child during the 7 days ending yesterday? <input type="checkbox"/>		STPAYM (333) Q10 9C1	
(ii) How many days did this cover? <input type="checkbox"/>		STDAYCOV (333A) Q10 9C2	- Ask 110

To all households **Ask spenders**

RECORD 25

110 Are any of you (or your children under 16) attending a course for which you/they receive an education grant, maintenance grant or scholarship?

CORGR (335A)

Yes Q110

No

1
2

- Ask (a) & (b)  
- Go to 111

Include holiday periods

RECORD 83

Use separate column for each grant received

(a) Who is receiving the grant? → Per No.

		GRANTPNO (336)	Q11	OA1	
--	--	----------------	-----	-----	--

- Ask (b)

Ring Column No.

1	GRITEMNO (336A)	Q11	OA2 <sup>4</sup>
---	-----------------	-----	------------------

(b) Is the source of the grant

Running prompt

State →  
Private →  
Overseas? →

1	GRANTSOU (337)	Q11	OB
2	2	2	2
3	3	3	3

- Ask (c)  
- Go to (d)

(c) What is the current annual value of the grant excluding fees?

£ p | £ p | £ p | £ p

		GRAVEXFE (338)	Q11	OC
--	--	----------------	-----	----

- Go to (c)

or

(d) What is the current annual value of the grant including fees?

		GRAVINCF (339)	Q11	OD
--	--	----------------	-----	----

- Ask (c)

(e) How much of this is paid direct to you (or your children) by cash or cheque?

		GRANTDIR (341)	Q11	OE
--	--	----------------	-----	----

- Ask (f)

(f) Is the grant for attendance at a state or private establishment?

State? →  
Private? →

1	ESTTYPE (342)	Q11	OF
2	2	2	2

- Ask (g)

(g) Is the course you (or your children) are attending

Running prompt  
Up to and including 'A' level →  
Above 'A' level? →  
DK →

1	CORTYPE (343)	Q11	OG
2	2	2	2
3	3	3	3

- Go to 111  
- Ask (i)

(i) What is the name of the examination you (or your children) will take?


- Ask 111

To all households

All spenders

RECORD 25

111 In the last 3 months that is since.....  
have (any of) you paid any fees or  
maintenance for any educational courses  
at any level but excluding leisure classes?

EDUCFEES (344)

Yes  $\xrightarrow{Q111}$  1 - Ask (a)-(c)  
No  $\xrightarrow{\hspace{1cm}}$  2 - Go to 112

Include parental contribution

RECORD 97

Use separate column for each course

(a) Who is/was attending the course?  $\xrightarrow{\hspace{1cm}}$  Per. No.

		EDUC PNO	(344A)	Q111	A1	
--	--	----------	--------	------	----	--

- Ask (b)

Ring Column No.

1		EDUC <sup>2</sup> ITNO	(344B)	Q111	A2	4
---	--	------------------------	--------	------	----	---

£ p | £ p | £ p | £ p

(b) What is the total amount paid in the last 3 months?  $\xrightarrow{\hspace{1cm}}$

		EDUCF AMT	(345)	Q111	B	
--	--	-----------	-------	------	---	--

Ask (c)

(c) Is/was the course at a state or private establishment?

State  $\xrightarrow{\hspace{1cm}}$   
Private  $\xrightarrow{\hspace{1cm}}$

1		EDUCE <sup>1</sup> TTY	(346)	Q111	C	1
2		2	2	2		2

- Ask (d)

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

Running prompt  
Up to and including 'A' level  $\xrightarrow{\hspace{1cm}}$   
Above 'A' level?  $\xrightarrow{\hspace{1cm}}$   
DK  $\xrightarrow{\hspace{1cm}}$

1		EDUC <sup>1</sup> COTY	(346A)	Q111	D	1
2		2	2	2		2
3		3	3	3		3

- Go to (c)

- Ask (i)

(i) What is the name of the examination you (or your children) will take?  $\xrightarrow{\hspace{1cm}}$


(e) Are you (or your children) currently attending the course?

Yes  $\xrightarrow{\hspace{1cm}}$   
No  $\xrightarrow{\hspace{1cm}}$

1		EDUC <sup>1</sup> STAT	(346B)	Q111	E	1
2		2	2	2		2

- Ask 112

To all households

All spenders

112 In the last 3 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, playgroup, day nursery.

RECORD 25

LEISCFEE (347)  
 Yes Q112 → 

1
2

 - Ask (a)-(c)  
 No → 

2
---

 - Go to 113

RECORD 98

Use separate column for each course										
(a) Who is/was attending the course? →			LEISCPNO	(347A)	Q112	A1				- Ask (b)
	Ring Column No.	1	LEISCITN	(347B)	Q112	A2	4			
		£	p	£	p	£	p	£	p	
(b) What is the total amount paid in the last 3 months? →			LEISCAMT	(348)	Q112	B				- Ask (c)
(c) Is/was the course										
at a state establishment →	1	1	1	1						- Ask (d)
at a private establishment →	2	2	2	2						
or an individual giving private tuition? →	3	3	3	3						
(d) What is the subject being studied? →										- Ask (c)
(e) Are you (or your children) currently attending the course?										
Yes →	1	1	1	1						- Ask 113
No →	2	2	2	2	LEISC SAT	(349A)	Q112	E	2	

To all households

**All spenders**

RECORD 25

113 (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  $\xrightarrow{Q113}$ 

1
2

 - Ask (a)&(b)  
 No  $\xrightarrow{\hspace{1cm}}$ 

2
---

 - Sec 114

RECORD 99

(a) Who is attending the course?  $\xrightarrow{\hspace{1cm}}$  Per No

Use separate column for each spender attending			
		PTPERNO (349C) Q113 A1	

- Ask (b)

Ring Column No.

1	PTITEMNO (349D) Q113 A2 4		
---	---------------------------	--	--

(b) Is the course

Running prompt  
 Up to and including 'A' level  $\xrightarrow{\hspace{1cm}}$   
 Above 'A' level?  $\xrightarrow{\hspace{1cm}}$   
 DK  $\xrightarrow{\hspace{1cm}}$

	PTTYPE (349E) Q11 3B		
1	1	1	1
2	2	2	2
3	3	3	3

- Sec 114

- Ask (i)

(i) What is the name of the examination you will take?  $\xrightarrow{\hspace{1cm}}$


- Sec 114

Check front page of Household Schedule

all households with a member aged 14 - 18 who is coded 5 (state secondary) or 6 (non-advanced further education up to 'A' level) at Q.7, front page

DNA. Others  $\xrightarrow{\hspace{1cm}}$ 

N
---

 - Go to 115

RECORD 100

Per No

Use separate column for each child			
		TVEIPNO (349F) Q11 4 1	

114 Is the course you (or your children) are attending part of the technical and vocational educational initiative?

Yes  $\xrightarrow{\hspace{1cm}}$   
 No  $\xrightarrow{\hspace{1cm}}$   
 DK  $\xrightarrow{\hspace{1cm}}$

	TVEI (349H) Q11 4 2 1		
1	1	1	1
2	2	2	2
3	3	3	3

- Ask 115



**All spenders**

**Educational income and expenditure for non household members**

**RECORD 25**

115 Have you a child aged 16 to 24 outside this household who is currently receiving full or part-time education?

OUTGRANT (350)

Yes  $\xrightarrow{Q115}$

No  $\longrightarrow$

1
2

- Ask (a)-(f)

- Go to 120

Include married children aged 16 - 24

**RECORD 28**

Use separate column for each child				
31	OSPERSONO (351) Q11 SA	32	33	34

(a) Ring person number  $\longrightarrow$

(b) Enter relationship to HOH  $\longrightarrow$

--	--	--	--

	OSPERHOH (355) Q11 SB			OFF. USE
--	-----------------------	--	--	----------

(c) Sex

Male  $\longrightarrow$

Female  $\longrightarrow$

1	OSPERSEX (352) Q11 SC	1
2	2	2

- Ask (d)

(d) Age now  $\longrightarrow$

	OSPERAGE (353) Q11 SD	
--	-----------------------	--

- Ask (e)

(e) Full or part-time education

Full time  $\longrightarrow$

Part time  $\longrightarrow$

DK  $\longrightarrow$

1	OSPEREST (354) Q11 SE	1
2	2	2
3	3	3

- Ask (f)

(f) Enter person number of parent/guardian giving details at (a) - (e)  $\longrightarrow$

	OSPARENT (356) Q11 SF	
--	-----------------------	--

- Ask 116

116 In the last 3 months, that is since..... have you paid any of the following for the child you have just mentioned:

Include parental contribution

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

Yes  $\longrightarrow$

No  $\longrightarrow$

1	OSEDFEE (364) Q11 6A	1
2	2	2

- Ask (i) & (ii)

- Go to 117

£ p | £ p | £ p | £ p

(i) What is the total amount paid in the last 3 months?

	OSEDFAMT (365) Q11 6A1	
--	------------------------	--

- Ask (ii)

(ii) Was the course at a state or private establishment?

State  $\longrightarrow$

Private  $\longrightarrow$

1	OSEDESTT (366) Q11 6A2	1
2	2	2

- Ask 117

Use separate column for each child			
31	32	33	34

117 Is your child attending a course for which they receive an education grant, maintenance grant or scholarship?

Yes →	1	1	1	1
No →	2	OSCORGR	(357A) <sub>2</sub> Q117	2

- Ask (a)  
- Go to 120

(a) Is the source of the grant

Running prompt

state →	1	1	1	1
private →	2	OGSOURCE	(359) <sub>2</sub> Q117A	2
overseas? →	3	3	3	3

- Ask (b)  
- Go to (c)

(b) What is the current annual value of the grant excluding fees?

£	p	£	p	£	p	£	p
		OGEXFEE	(360)	Q117B			

- Go to 118

or

(c) What is the current annual value of the grant including fees?

		OGINCFEE	(361)	Q117C			
--	--	----------	-------	-------	--	--	--

- Ask 118

118 Is your child attending a

Running prompt

University →	1	1	1	1
another state establishment →	2	OSESTTYP	(362) <sub>2</sub> Q118	2
or private establishment? →	3	3	3	3

- Ask 119

119 Is the course

Running prompt

up to and including 'A' level →	1	1	1	1
above 'A' level? →	2	2	2	2
DK →	3	3	3	3

- Go to 120  
- Ask (a)

(a) What is the name of the examination your child will take?


- Ask 120

To all households

All spenders

RECORD 25

EMP13W (363B)

Yes Q120 → 1 - Ask (i)  
 No → 2 - Go to

BUSREF (363A)

Yes Q120A → 1 - Ask (i)  
 No to all → 2 - Go to

120 Have (any of) you been an employee at any time during the last 3 months?

Refer informant to Prompt Card H

(a) Do you have (have you had) any of these items refunded by your employer (main or subsidiary)?

(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	Per No	Amount refunded £      p	Period covered by refund	If code 9, specify period
Rent (18) →	1	X				
Rates (24) →	2	X				
Water/sewerage rates (28) →	3	X				
Mortgage payment (32 or 35) →	4	X				
Insurance on structure (41) →	5	X				
Gas (61-70) →	6 Q120A1	X	A2	A3	A4	
Electricity (51-60) →	7 Q120A1	X	Q120	Q120	Q120	
Telephone (42-48) →	8 Q120A1	X	(435A)	(436)	(437)	
	8 BUSEXPEN	X	ERNQ	RAMT	436	
Road fund tax (77(b) and 79(b)) →	9	X	BUSE	BUSE	PERC	
	9	X				
Vehicle insurance (77(e) and 79(e)) →	10	X				
	10	X				
Vehicle purchase (81 and 84-87) →	11	X				
	11	X				



To all households

All spenders

RECORD 25

123 Do (any of) you pay maintenance allowance or separation allowance?

SEPAL (595)

Yes Q123

No

1
2

- Ask (a) & (b)  
- Go to 124

RECORD 109

Use separate column for each arrangement

Per No.			SEPAL PNO (595A)	Q123	1	
---------	--	--	------------------	------	---	--

Ring Column No.

1	SEPAL <sup>2</sup> PNO (595B) <sup>3</sup>	Q123	24
---	--	------	----

£ p | £ p | £ p | £ p

(a) How much was your last payment?

		SEPAL AMT (595C)	Q123A
--	--	------------------	-------

- Ask (b)

(b) How long did this cover?

Enter period code

	PERC 595C (595D)	Q123B

If code 9, specify period

- Ask 124

The information on this page should be obtained from local authority office and entered below

RECORD 25

124 Gross Value of rateable unit(s) covering the household	GRV (372) Q124	£	p
125 Net Rateable Value of rateable unit(s) covering the household	NRV (373) Q125		

126 Copy from valuation lists

Description (Flat, shop with flat, house with garage, etc)	Location in Building

Sec 127

( ) all households containing men aged 65 and over and women aged 60 and over

DNA → 

N
---

Sec 128 and checks then go to next document

127 What concessionary bus travel provisions are provided for OAP's:

- 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? Specify →
- INA129 (374)
- No concessionary bus travel provision in area →

1
2
3
4
5
6

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

Sec 128 and checks then go to next document

(a) Annual value of tokens/tickets

CONBUSAM(375)  
Q127A

£	p
---	---

- Ask (b)

(b) Are passes and permits charged for?

CBUSCH(375A)  
Yes →  
No → Q127B

1
2

- Ask (i) & (ii)  
- Sec 128 and checks then go to next document

(i) How much is charged?

CBUSCHAM(375B)  
Q127B1

£	p
---	---

(ii) Period covered by charge?

PERC375B(375C)  
Enter Q127B2 period code →


If code 9, specify period

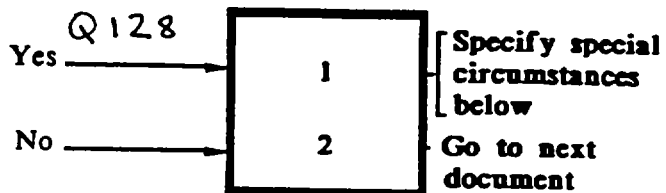
Sec 128 and checks then go to next document

To all households at end of record-keeping period (Ask hoh or wife)

128 Were there any special circumstances, such as visitors staying with you or temporary absences of members of your household during the past two weeks?

RECORD 25

SPECCIRC(375D)



Specify special circumstances

First check at home:

General Points

1. Is the correct serial number and person number recorded at all relevant points throughout the Household Schedule and its continuation pages?

Yes . . . . . 1

No . . . . . 2      Added/amended  Tick

2. Are all line and column numbers and relevant DNA codes ringed?  
(Exclude those in sections you have skipped)

Yes . . . . . 1

No . . . . .

3. Have period codes been entered at all relevant questions?

Yes . . . . .

No . . . . .

PERIOD CODES	
[ ENTER AS SINGLE ]	
WEEK .....	
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

Income Schedule

If the spenders have been seen separately, check that all spenders have been asked these questions on S838A  
71 - 123

Office Use			
C.I.			
Interviewer Use			
Area	Ser.	Hld.	
		0	

Ref. No. →  
AREANUMB (382) Q.000 3  
SERNUMB (383) Q.000 4

HHNUMB (384) Q.000 5

Pcr. No.	Pcr. No.	Pcr. No.
PERS NOB	(385)	Q.000 6

To all

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

(a) Are you.....

Y	Y	Y
X	X	X

- Ask (a)  
- Go to (b)

Working as [an employee\* (inc. CP/ACE,+)  
self employed\*\* or employer

1	1	1
2	2	2
INA 201	(386)	Q.001
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 JTS/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 irrespective of number of hours worked per week (include short time working).  
Directors of limited companies.

\*\*Self employed (code 2) includes:  
all working regularly irrespective of number of hours worked per week; also includes childminders

Exclude mail order agents and baby sitters

+ Receiving a wage

CP = Community Programme (Great Britain)

ACE = Action for Community Employment (Northern Ireland)

@ Receiving an allowance

JTS = Job Training Scheme (Great Britain)

TOPS = Training Opportunity Scheme (Great Britain)

ATS = Attachment Training Scheme (Northern Ireland)

YTS = Youth Training scheme (Great Britain)

YTP = Youth Training Programme (Northern Ireland)

@ Include as unemployed anyone receiving unemployment benefit even if they are not seeking work or consider themselves retired or none of these.

Interviewer: see page 68 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.....?

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

Employee ask 3: Self-employed go to 9

WKSWEMP (387) Q002

To all Employees (coded 1 at 1 (a))

3 Have you been to work today?

ATWORK (388A) Q003

Yes

1	1	1
2	2	2

Go to 9 Ask (a)

Probe to find out whether day of interview is a normal working day - if normal working day and away from work, code 2

No

(a) Have you been away from work for more than the last 3 working days?

AWLS3DAY (389) Q003A

Yes

1	1	1
2	2	2

Ask (i)-(i) Go to 9

No

(i) What is the reason for your absence:

INA20Y (390) Q003A1

Running prompt illness or accident holiday strike other? Specify

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

Ask (i) Specify below a ask (ii)

(ii) Are you receiving

INA209 (391) Q003A2

Running prompt full pay from your employer part pay, or made up pay no pay?

1	1	1
2	2	2
3	3	3

Ask (i)

(iii) How many weeks in all have you been away from work during this spell of absence?

NOWKSAW (392) Q003A3

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

Go to 9

If less than one week, give days

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

Go to 9

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

Per No.		Per No.		Per No.	
£	p	£	p	£	p
X		X		X	

Go to 51

4 When did you last do any regular paid work?

Month

Year 19

DATA LSTWIK (393A) Q004


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.....?

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

Go to 9

WKSUNEM (394) Q004A

To all retired (coded 6 at 1(b))

5 Have you retired in the last 12 months, that is since.....?

Yes  
No

RETL12M (394A) Q005

1	1	1
2	2	2

Ask (a)  
Go to 51

(a) How much did you earn from your job (before tax) in the 12 months just before you retired?

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

Go to 51

RETEARN (396) Q005A

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

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

Go to 51

6 Are you prevented from seeking work because you are looking after a sick or aged relative?

Yes  
No

INA217 (397) Q006

1	1	1
2	2	2

Go to 8  
Ask 7

INA 221 (398) Q007

7 (As far as you know) are you permanently unable to work?

Yes  
No

1	1	1
2	2	2

Ask (a)  
Go to 8

(a) Could you tell me why you are permanently unable to work?


Ask 8

4

To men aged under 65 and women aged under 60 who are coded 5 or 7 at 1(b)(cont'd)

Per No.		Per No.		Per No.	

8 Have you done any regular paid work during the last 12 months, that is since.....?

£	p	£	p	£	p
---	---	---	---	---	---

Yes →  
No →

1	1	1
2	2	2

REGWORK (39) Q008

Ask (a)-(c)  
Go to 51

REGWKS (399A) Q008A

(a) For how many weeks did you work?

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

Ask (b)

(b) What wage/salary did you usually receive each time you were paid after all deductions?

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

REGPAY (40) Q008B

Ask (c)

(c) How often were you usually paid?

Enter period code →

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

PERC400 (4) Q008C  
If code 9, specify period —

Go to 51

To 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 51

9 Do/did you have more than one job (for pay or profit)?

one job only? →

Y	Y	Y
---	---	---

Enter details at

more than one job? →

X	X	X
---	---	---

Enter details at (a) - (c)

(a) Details of most remunerative job (Interviewer to code occupation)

Exclude mail order agents and baby sitters

Per. No. ....

Job title .....

Work done .....

What does the firm/organisation actually make or do? .....

CODE OCCUPATION		

OCCUP (402) Q009A1

Code employment status below

If director, ring code →

1
1

INA276 (404) Q009A2

Ask (b) & (c)

Employment status Employee  
Self employed

Question 9(a) (continued)

Per No.		Per No.		Per No.	

Per. No.....

Job title.....

Work done.....

.....

.....

What does the firm/organisation actually make or do?.....

.....

If director, ring code →

Employment status

Employee →

Self employed →

CODE OCCUPATION		

Code employment status below

1
1
2

- Ask (b) & (c)  
- Go to (d)

Per. No.....

Job title.....

Work done.....

.....

.....

What does the firm/organisation actually make or do?.....

.....

If director, ring code →

Employment status

Employee →

Self employed →

CODE OCCUPATION		

Code employment status below

1
1
2

- Ask (b) & (c)  
- Go to (d)

If employee (including Director)

(b) Are/were you a

Manager →

Foreman/supervisor →

Other employee? →

SUPERVIS (405A)

Q009B

1	1	1
2	2	2
3	3	3

- Ask (c)

(c) How many employees work(ed) in the establishment?

1 or 2 →

3 - 24 →

25 - 99 →

100 - 999 →

1000 or more →

SIZE EST (405B)

Q009C

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

- See (c) on page 6

If self-employed

(d) Do/did you employ any other people?

Yes 1 - 24 employees →

25 or more →

SEEMPLOY (405C)

Q009D

1	1	1
2	2	2

- See (c) on

Question 9 (continued)

(c) Ask for details of subsidiary job (occupation need not be coded here)

DNA →

Per No.		Per No.		Per No.	
N		N		N	

Sec 10 or 44

Exclude mail order agents and baby sitters

Per. No.....

Job title.....

Work done.....

What does the firm/organisation actually make or do?.....

Code employment status bel

Employment status

If director, ring code →

Employee →

Self employed →

1
1
2

INA277 (406)

Q009E1

Sec 10 or 44

Per. No.....

Job title.....

Work done.....

What does the firm/organisation actually make or do?.....

Code employment status bel

Employment status

If director, ring code →

Employee →

Self employed →

1
1
2

Sec 10 or 44

Per. No.....

Job title.....

Work done.....

What does the firm/organisation actually make or do?.....

Code employment status bel

Employment status

If director, ring code →

Employee →

Self employed →

1
1
2

Sec 10 or 44

To all employees (coded 1 at 1(a)) or all unemployed (coded 3 or 4 at 1(b)) whose last job was as employee Most remunerative job as employee (see 9(a))

Per No.		Per No.		Per No.	

£	p	£	p	£	p
N		N		N	

10 On what date were you last paid a wage or salary?

Day

Month

Year.19


- Sec 44  
PAYDAT (408) Q010 1  
If more than a year ago, no further details required. Go to next job or 51

Anticipated pay given, ring code

1		1		1	
---	--	---	--	---	--

ANTICPAY (409) Q010 2  
- 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 this cover?

Enter period code


PERC409 (410) Q012  
If code 9, specify period  
- Ask 13

13 Did this include a refund of income tax?

Yes

No

1		1		1	
2		2		2	

TAXREF (411) Q013

- Ask (a)  
Go to 14  
TAXREFAM (411) Q013A

(a) How much was it?

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

- Ask 14

14 How much was deducted for income tax under PAYE?

No tax deducted

NOTAX (412A) Q014 2

(a) Do you usually pay tax?

Yes

No

1		1		1	
1		1		1	
2		2		2	

TAXUSUAL (413) Q014A

If no tax deducted code '1' below, then ask (a); others go to 15

Specify below why tax not paid  
- Ask 15

NINO (414) Q015 1

15 How much was deducted as National Insurance contribution?

No N.I. deductions

(a) Do you usually pay National Insurance contributions?

Yes

No

1		1		1	
1		1		1	
2		2		2	

If no N.I. deducted code '1' below, then ask (a); others go to 16

NONINO (414) Q015 2  
- Ask 16

Most remunerative job (continued)

Per No.		Per No.		Per No.	

16 Were there any deductions from your wage/salary for charities?

DEDCH (438) Q016

Yes  
No

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a) & (b)  
- Go to 17

(a) Were there any deductions made under the tax-free payroll deduction scheme?

DEDCHTFS (438A) Q016A

Yes  
No  
DK

1	1	1
2	2	2
3	3	3

- Ask (i)  
- Go to (b)

(i) How much was deducted?

DK

DCHTFSDK		DCHTFSDK		DCHTFSDK	
1		1		1	

← Q016A

(b) Were there any deductions made for other charity schemes?

DEDCHOC S (438D) Q016B

Yes  
No  
DK

1	1	1
2	2	2
3	3	3

- Ask (i)  
- Go to 17

(i) How much was deducted?

DK

DCHOC SAM (438E)		DCHOC SAM (438E)		DCHOC SAM (438E)	
1		1		1	

Ask 17

DCHOC SDK (438F) Q016B 2



**Most remunerative job (continued)**

17 Were there any other deductions from your wages/salary such as superannuation, union fees, Friendly Societies, sports clubs or specialised pastimes?

Per No.		Per No.		Per No.	
£	p	£	p	£	p

DEDUCTS (414C) Q017  
 Yes →  
 No →

1	1	1
2	2	2

Record details below  
 - Go to (a)

Superannuation

Ring code and enter amount

1	1	1

DEDSUP (415) Q017 1  
 DEDSUPAM (415) Q017 2

Union fees

Ring code and enter amount

2	2	2

DEDUF (415) Q017 3  
 DEDUFAMT (415) Q017 4

Friendly societies

Ring code and enter amount

3	3	3

DEDFS (415) Q017 5  
 DEDFSAMT (415) Q017 6

Sports clubs and specialised pastimes

Ring code and enter amount

4	4	4

DEDESC (415) Q017 7  
 DEDESCAMT (415) Q017 8

DEDOTH (416A) Q017 9

Other deductions

Ring code

5	5	5
---	---	---

Specify below and enter amounts

Per No.	Purpose of deduction
	DEDONEAM (416B) Q017 10

--	--	--

	DEDONETY (416C) Q017 11
--	-------------------------

--	--	--

OFF. USE

	DEDONEQU (416D) Q017 12
--	-------------------------

--	--	--

OFF. USE

	DEDTWOAM (416E) Q017 13
--	-------------------------

--	--	--

	DEDTWOTY (416F) Q017 14
--	-------------------------

--	--	--

OFF. USE

	DEDTWOQU (416G) Q017 15
--	-------------------------

--	--	--

OFF. USE

	DEDTHRAM (416H) Q017 16
--	-------------------------

--	--	--

	DEDTHRTY (416I) Q017 17
--	-------------------------

--	--	--

OFF. USE

	DEDTHRQU (416J) Q017 18
--	-------------------------

--	--	--

OFF. USE

If pay slip consulted:-

(a) What was the gross wage/salary including superannuation as shown on payslip?

--	--	--

See (a)

See 18 7

If pay slip not consulted. see 18

Most remunerative job as employee (continued)

Per No.		Per No.		Per No.	

To all currently employed or those who have been unemployed for 3 months or less (see Q4(a))

DNA. If unemployed for more than 3 months

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

Go to 22

18 Was any mileage allowance or fixed allowance for motoring included in the net pay of £.....(see 11) that you received on ..... (see 10)?

Yes  
No

MALINPAY (48B) Q018

1	1	1
2	2	2

Ask (a)  
Go to 19

MILEALL (440) Q018A

(a) How much was included?

£	p	£	p	£	p

Ask 19

19 (In addition to mileage/fixed allowance) were there any refunds for motoring expense included in the net pay of £..... (see 11) that you received on ..... (see 10)?

Yes  
No

MOTEXREC (440A) Q019

1	1	1
2	2	2

Ask (a)  
Go to 20

(a) How much was included?

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

Ask 20

OTHMOTRE (442) Q019A

11

Most remunerative job as employee  
(continued)

Refer informant to Prompt Card J

20 Were there any refunds of household expenditure shown on Card J by your current (last) employer included in the net pay of £..... (see 11) you received on ..... (see 10)?

Per No.		Per No.		Per No.	

HHEXPINC (442A) Q020

£	p	£	p	£	p
1		1		1	
2		2		2	

Specify below and enter amounts  
Go to 21

Per No	Describe fully what was covered by refund
	BUSERIN1 (439B) Q020 1
	BUSERIN 2 (439C) Q020 2


Ask 21

21 (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) you received on ..... (see 10)?

OTHBUINC (439A) Q021

1	1	1
2	2	2

Specify below and enter amounts  
Ask 22

Per No	Describe fully what was covered by refund
	OTHBUSE 1 (443A) Q021 1
	OTHBUSE 2 (443B) Q021 2


Ask 22

To all employees (coded 1 at 1(a)) & all unemployed (coded 3 or 4 at 1(b))

22 How many hours a week do/did you usually work, excluding meal breaks and overtime?

INA220 (419) Q022

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

Ask 23

23 On average, how many hours (if any) paid overtime do/did you usually work in a week?

INA244 (420) Q023

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

See 24

To all employees (coded 1 at 1(a)) who usually work less than 24hrs per week (see Q22)

DNA. Others

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

Go to 25

24 Are you seeking a job with more hours?

WKMT24HR (421) Q024

1	1	1
2	2	2

Ask 25

**Most remunerative job as employee (cont'd)**

25 Was your last wage or salary affected by Statutory Sick Pay or Statutory Maternity Pay?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	
4		4		4	

- Both \_\_\_\_\_ →
- Statutory Sick Pay only \_\_\_\_\_ →
- Statutory Maternity Pay Only \_\_\_\_\_ →
- No to both \_\_\_\_\_ →

PAYAFSMP Q025

Ask (a)

**Refer informant to Prompt Card K**

(a) Was your last wage or salary affected by any of the items shown on Card K?

- Yes \_\_\_\_\_ →
- No to all \_\_\_\_\_ →

PAYAFFC (422A)		Q025A	
1	2	1	2
1		1	
2		2	

Code at (i)  
Go to 26

CIRCUMST (424) Q025A 1

- (i) Holiday pay or other pay in advance \_\_\_\_\_ →
- Back pay \_\_\_\_\_ →
- Diffent pay rate for unsociable hours/different shifts \_\_\_\_\_ →
- Code An occasional bonus \_\_\_\_\_ →
- all Irregularly - paid overtime \_\_\_\_\_ →
- that Deductions from usual pay for N.I. benefit received \_\_\_\_\_ →
- apply 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	

Ask 26

Specify below and ask 26

26 Your last wage/salary after all deductions was £..... (see 11). Is this the amount you usually receive (when at work)?

INA254 (426) Q026

- Yes \_\_\_\_\_ →
- No \_\_\_\_\_ →

1		1		1	
2		2		2	

Go to 27  
Ask (a)-(c)

(a) What do you usually receive each time you are paid after all deductions?

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

USNETPAY Q026A

Ask (b)

(b) What do you usually receive each time you are paid before all deductions?

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

USGROPAY Q026B

Ask (c)

(c) How often are you usually paid?

Enter period code

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

If code 9, specify period

PERC428 (429) Q026C

Ask 27 7

Most remunerative job as employee (cont'd)

14

27 In the last 12 months have you received any profit-related pay or profit sharing bonuses?

Per No.		Per No.		Per No.	

PSBONUS (423) Q027

Yes →  
No →

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (a)  
- Go to 28

(a) How much in total did you receive?

PSBONTXF (423C) Q027B

DK →

1		1		1	

PSBONAM (Q027A)  
- Ask (b)  
PSBONDK (Q027A)

(b) Was any of it paid to you tax-free?

Yes →  
No →  
DK →

1		1		1	
2		2		2	
3		3		3	

- Ask (i)  
- Go to 28

PSBTXFAM (423D) Q027B1

(i) How much was paid tax-free?

DK →

1		1		1	

Ask 28

PSBTXFDK (423E) Q027B2

28 In the last 12 months have you received any other bonuses such as Christmas or quarterly bonus or an occasional commission?

Yes →  
No →

BONUSES(430)		Q028			
1		1		1	
2		2		2	

Specify below and enter amounts  
- See 30

Per.No.	DESCRIPTION
	BONUSAM1 (431A) Q028 1
	Was this amount before tax
	after tax
	DK
	BONUSAM2 (431B) Q028 3
	Was this amount before tax
	after tax
	DK
	BONUSAM3 (431C) Q028 5
	Was this amount before tax
	after tax
	DK

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	

BOBATAX1 (Q028 2)  
- See 29  
BOBATAX2 (Q028 4)  
BOBATAX3 (Q028 6)

Most remunerative job as employee (cont'd)

Per No.		Per No.		Per No.	

To all receiving a bonus (coded 1 at 27 and/or 1 at 28) whose last pay was not usual (coded 2 at 26)

£	p	£	p	£	p
---	---	---	---	---	---

DNA. Others →

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

- See 30

29 Did the usual net pay of £..... (see 26(a)) include any of this bonus or commission?

**BONUSPAY (432A) Q029**

Yes →

1	1	1
---	---	---

- Ask (a)

No →

2	2	2
---	---	---

- Go to 30

**BONINUSP (433) Q029A**

(a) How much was included? →

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

- Ask 30

To all whose last pay was not usual (coded 2 at 26)

DNA. Others →

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

- See 31

30 Was any allowance for motoring included in your usual net pay of £..... (see 26(a))?

**MALLUSP (433A) Q030**

Yes →

1	1	1
---	---	---

- Ask (a)

No →

2	2	2
---	---	---

- See 31

(a) How much was included? →

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

- See 31

**(MALLINNP (441) Q030A)**

**Most remunerative job as employee (cont'd)**

**To all currently employed or those who have been unemployed for 3 months or less (see Q.4(a))**

Per No.		Per No.		Per No.	

DNA. If unemployed for more than 3 months →

£	p	£	p	£	p
N		N		N	

- See 35

31 Has Inland Revenue allowed you, or will you be claiming, tax relief for expenses incurred as a result of your employment, such as overalls, clothing, tools, subscriptions to professional societies?

Yes →  
No →

TAXRELAL (441A)		Q031	
1	1	1	1
2	2	2	2

- Ask (a)  
- Go to 32

(a) What is the amount on which tax relief was/will be allowed? →

TAXRELF (434)		Q031A	

- Ask 32

32 Do/did you receive any luncheon vouchers from your current (last) employer?

Yes →  
No →

LV (434A)		Q032	
1	1	1	1
2	2	2	2

- Ask (a)  
- Go to 33

(a) Have you used any luncheon vouchers in the last 7 days?

Yes →  
No →

LVUSED (434B)		Q032A	
1	1	1	1
2	2	2	2

- Ask (i)-(ii)  
- Go to 33

(i) How many have you used in the last 7 days? →

LVNOS (444)		Q032A 1	

- Ask (ii)

(ii) What was the value of each voucher used? →

LVVAL (445)		Q032A 2	

- Ask 33

33 Have you received any free meals from your employer in the last 7 days?

Yes →  
No →

FREEMEAL (445A)		Q033	
1	1	1	1
2	2	2	2

- Ask (a)  
- Go to 34

(a) How many free meals have you received in the last 7 days? →

EMPFREEM (446)		Q033A	

- Ask 34

**Most remunerative job as employee (cont'd)**

**34** Has your employer supplied you with any free food e.g. milk, potatoes, in the last 7 days?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	

EMPFREEF Q034

Yes →  
No →

← Ask (a)  
← Sec 35

**(a)** What was the free food supplied in the last 7 days, and how much was supplied?

EMPFMLKP(448A) Q034A 1

Milk (pints)					
Eggs (dozens)					
Potatoes (lbs)					
Other. Specify Food	1	1	1		
Quantity					

EMPFEGGS (Q034A 2)

Specify below and see 35

Sec 35

EMPFOVA1 (452A) Q034A5 →

EMPFOVA2 (452B) Q034A 6 →

						OFF. USE
						OFF. USE

**Subsidiary employee section**

**Ask all those with subsidiary employment as employee (see 9(c))**

DNA - no subsidiary employment as employee →

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

← Sec 44

**35** On what date were you last paid a wage or salary?

SUBDAT (453) Q035

Day →

Month →

Year 19 →


If more than a year ago, no further details required. Sec 44

**36** What was your wage/salary, including overtime, bonus, commission or tips after all deductions the last time you were paid?

--	--	--	--	--

SUBSIDP' Q036

← Ask 37

**37** How long did this cover?

Enter period code →

--	--	--

If code 9, specify period

PERC454 (455) Q037

← Ask 38



Subsidiary employment as employee (cont'd)

Per No.		Per No.		Per No.	

SUBTAXAM (456A) Q038 1

38 How much was deducted for income tax under P.A.Y.E? →

£	p	£	p	£	p

Ask 39

SUBTAXNL (456B) Q038 2 No tax deducted →

1	1	1
---	---	---

39 How much was deducted as National Insurance contribution? →

SUBNIAM (457A) Q039 1

1	1	1
---	---	---

Ask 40

SUBNINL (457B) Q039 2 No N.I. deducted →

40 Were there any deductions from your wage/salary for charities?

SUBCH (459) Q040

Yes →  
No →

1	1	1
2	2	2

Ask (a)  
Go to 41

(a) Were there any deductions made under the tax-free payroll deduction scheme?

SUBCHTFS (459A) Q040A

Yes →  
No →  
DK →

1	1	1
2	2	2
3	3	3

Ask (i)  
Go to (b)

(i) How much was deducted? →

SCHTFSAM (459B) Q040A 1

DK →

1	1	1
---	---	---

Ask (b)

SCHTFSDK (459C) Q040 A2 →

(b) Were there any deductions made for other charity schemes?

SUBCHOCS (459D) Q040B

Yes →  
No →  
DK →

1	1	1
2	2	2
3	3	3

Ask (i)  
Go to 41

(i) How much was deducted? →

SCHOCSAM (459E) Q040B 1

DK →

1	1	1
---	---	---

Ask 41

**Subsidiary employment as employee (cont'd)**

**41** Were any other deductions made from your wages/salary such as superannuation, union fees, Friendly Societies, sports clubs or specialised pastimes?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	

SUBSDUCTS (46) Q041

Record details below  
Go to 42

Superannuation

Ring code and enter amount

1	1	1

SUBSUP (463A) Q041 1

SUBSUPAM (46) Q041 2

Union fees

Ring code and enter amount

2	2	2

SUBUF (463C) Q041 3

SUBUFAMT (46) Q041 4

Friendly Societies

Ring code and enter amount

3	3	3

SUBFS (463E) Q041 5

SUBFSAMT (46) Q041 6

Sports clubs and special pastimes

Ring code and enter amount

4	4	4

SUBSC (463G) Q041 7

SUBSCAMT (46) Q041 8

SUBSOth (458) Q041 9

Other deductions

Ring code

5	5	5
---	---	---

Specify below and enter amounts

Per No.	Purpose of deduction
	SUBONEAM (458A) Q041 10

SUBONET (458B) Q041 11

SUBONEQU (458C) Q041 12


OFF. USE  
OFF. USE

See 42

If pay slip consulted:

**42** What was the gross wage/salary including superannuation as shown on pay slip?

SUBSGROS (46) Q042	

See 44

If pay slip not consulted, see 44

There is no Question 43

To all self employed (coded 2 at 1(a)) or unemployed (coded 3 or 4 at 1(b)) whose last job in the last 12 months was as self-employed

Per No.		Per No.		Per No.	

£	p	£	p	£	p
---	---	---	---	---	---

DNA not self employed →

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

Go to 51

Exclude mail order agent or babysitter (sec 74)

44 How much net profit (or loss) did you receive from your business or profession in the last 12 months for which you have information, that is after deducting all expenses and wages but before deducting income tax, N.I. contributions or money drawn for your own use?

SEPROFIT (464)	Q044 1
----------------	--------

Profit →

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

Go to 47

Nil Profit →

SENILPRO (464A)	Q044 2
1	1

SELOSS (470A)	Q044 3
---------------	--------

Loss →

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

Ask 45

DK →

SEPRLODK (470B)	Q044 4
1	1

Income covering less than a year is acceptable if business is newly established

SESUBINC (477)	Q044 5
----------------	--------

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

OFF. USE

To self employed answering Nil Profit, Loss or DK at 44

45 Do you draw sums of money or cheques regularly from the business for your own use?

Yes  
No

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	

SEREGS (4) Q045

Ask (a)  
Go to 46

(a) How much on average do you take out each week/month?

SERSUMDK (465A) Q045 A2 DK

Enter period code

Per No.		Per No.		Per No.	
1		1		1	

SERESUM (1) Q045A 1

Ask (b)  
Go to 46

(b) How often do you take out that amount?

PERC465 (466) Q045B

If code 9, specify period

Ask (c)

(c) In addition to the amount you have just told me about, do you draw sums of money or cheques from your business for the payment of any domestic bills?

Yes  
No

Per No.		Per No.		Per No.	
1		1		1	
2		2		2	

SEDOM (466A) Q 045C

Ask (i)  
Go to (d)

(i) How much on average do you take out each week/month?

SEDBILDK (467A) Q045 C2 DK

Enter period code

Per No.		Per No.		Per No.	
1		1		1	

SEDOMBIL (467) Q045C 1

Ask (ii)  
Go to 46

(ii) How often do you take out that amount?

PERC467 (468) Q045 C3

If code 9, specify period

Ask (d)

(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 month for which you have figures?

Profit

Nil Profit

SERESNPR (468B) Q045D 2

Loss

DK

SERESDK (468D) Q045D 4

Per No.		Per No.		Per No.	
1		1		1	
1		1		1	

SERESPR (468A) Q045D 1

SERESLOS (468C) Q045D 3

Go to 48

Ask 46

To self employed answering No at 45 or DK at 45(a), (c) or (d)

Per No.		Per No.		Per No.	

SETURNOV (471) Q046 1

46 What was the total turnover of the business during the most recent 12 month period for which you have figures?

£	p	£	p	£	p
1		1		1	

DK

SETURNDK (471A) Q046 2

Ask 47  
Go to 48

To all giving profit at 44 or answering 46

47 Are you the sole owner of your business or are you in partnership with someone else?

Sole ownership  
In partnership

SEPARTNR (474) Q047

1	1	1
2	2	2

Go to 48  
Ask (a)

(a) Have your partner's shares been included in the net profit, loss or turnover you gave me?

Yes  
No

SESHINC (474A) Q047A

1	1	1
2	2	2

Ask (i)  
Go to 48

(i) How much was included?

SEPARTSH (475) Q047A 1

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

Ask 48

To all self employed

Per No.		Per No.		Per No.	

48 What are the dates of most recent 12 months for which information is available?

Beginning - [ Month  
Year 19

SESTADAT (472) Q048 1


Include periods of less than 12 months if business is newly established.

Ending - [ Month  
Year 19

SEENDDAT (473) Q048 2


Ask 49

DK →

SEDATDK (473A) Q048 3

1	1	1
---	---	---

49 Apart from meal breaks do you usually work

Running prompt

less than 24 hours a week →  
24 hours but less than 31 hours a week →  
31 hours or more? →

SEHOURS (476) Q049

1	1	1
2	2	2
3	3	3

Ask 50

If more than one self-employed job, give overall total hours

To all self employed except those who have been unemployed for more than 3 months (see Q4(a))

Per No.		Per No.		Per No.	

DNA if unemployed for more than 3 months →

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

Go to 51

Refer informant to prompt card L

50 Are there any items on card L which you have claimed or will be claiming as a business expense for tax purposes?

SEBUSEXP (478)	Q050
Yes → 1	1
No to all → 2	2

- Ask (a)  
- See bottom of next page re subsidiary employment

(a) What percentage have you claimed or will you be claiming?

Where 44 has been answered, the percentages claimed in that year are preferable to future claims.

Vehicle expenses (77,79,81, 85-87)

Ring code and enter %

SEBUSEX1 (478A)	Q050 1
1	1
	← SEBEP Q05

Actual amounts of expenses refunded can be given if percentages cannot. Record these below percentage boxes.

Relating to this accommodation only

Rent (18)

Ring code and enter %

SEBUSEX 2 (478B)	Q050 3
2	2
	← SEBEP Q05

Mortgage payments (32 or 35)

Ring code and enter %

SEBUSEX3 (478C)	Q050 5
3	3
	← SEBEP Q05

Rates(24)

Ring code and enter %

SEBUSEX4 (478D)	Q050 7
4	4
	← SEBEP Q05

Water/sewerage rate (28)

Ring code and enter %

SEBUSEX5 (478E)	Q050 9
5	5
	← SEBEP Q05

Q.50(a) (cont'd)

Relating to this accommodation only

		Per No.	Per No.	Per No.	
Insurance on structure (41-71)	Ring code and enter %	SEBUSEX 6 (478 F)	Q 050 11		
		6	6	6	
				SEBEPCA6 (478 F) ← Q 050 12	
	Gas (61 - 70)	Ring code and enter %	SEBUSEX 7 (478 G)	Q 050 13	
			7	7	7
			SEBEPCA7 (478 G) ← Q 050 14		
Electricity (51 - 60)	Ring code and enter %	SEBUSEX 8 (478 H)	Q 050 15		
		8	8	8	
			SEBEPCA8 (478 H) ← Q 050 15		
Telephone (42)	Ring code and enter %	SEBUSEX 9 (478 I)	Q 050 17		
		9	9	9	
			SEBEPCA9 (478 I) ← Q 050 17		
Anything else Specify	Ring code and enter %	SEBUSEX 10 (478 J)	Q 050 19		
		10	10	10	
				SEBEPCA10 (478 J) ← Q 050 19 Specify below and see instructions below	

If has subsidiary job as employee (see 9(e) on page 6), go back to Q35 on page 17.

If has subsidiary job as self-employed (see 9(e) on page 6), ask Q's. 44 - 50 and record answers in left hand margin.



To all

Refer Informant to Prompt Card M

51 Are you at present receiving any of the state benefits shown on Card M?

Per No.		Per No.		Per No.	

£	p	£	p	£	p
1		1		1	
2		2		2	

BENCARDM (42) Q051

Yes →

No to all →

Code (a)-(c)  
Go to 52

Exclude Income Support/Supplementary benefit from (a) - (c)

Exclude Christmas Bonus from (a) - (c)

(a) Child benefit  
Include one parent benefit

Yes →

No →

CHILDBEN (484A) Q051A

1	1	1
2	2	2

Ask (i) & (ii)  
Go to (b)

(i) What was the amount of benefit you last received?

(ii) How long did this cover?

Enter period code

PERC485 (486) Q051A 2

CHILDBAM (484) Q051A 1

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

Ask (ii)

If code 9, specify period

NIPEN (487) Q051B

1	1	1
2	2	2
3	3	3

(b) N.I retirement pension

Yes →

Old person's pension

Yes →

No to both →

Ask (i) & (ii)  
Go to (c)

Include additional pension

(i) What was the amount of benefit you last received?

(ii) How long did this cover?

Enter period code

NIPENAMT (4) Q051B 1

Ask (ii)

PERC488 (4) Q051B 2

If code 9, specify period

See (iii)

**INTERVIEWER CHECK**

Is informant consulting a payment book or other document?

NIPNPYBK (489A) Q051B 3

Yes →

No →

1	1	1
2	2	2

Ask (iii) & (iv)  
Go to (c)

(iii) What documents are being consulted?

- Buff book only →
- Yellow book only →
- Yellow and buff book →
- Other Specify →

NIPNTYBK (489B) Q051B 4

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

Go to (c)  
Ask (iv)  
Specify below and ask (iv)

Q.51 (continued)

Prompt Card M (cont'd)

Per No.		Per No.		Per No.	

(iv) What amounts are shown on documents for

£	p	£	p	£	p

NIPNAPAM (48)  
Q05IB 5

NIPNMPAM (48)  
Q05IB 6

NIPNAPIN (48)  
Q05IB 7

NIPNMPIN (48)  
Q05IB 8  
- Ask (c)

Running Prompt

Additional pension (coded J)

Guaranteed minimum pension (coded K)

Additional pension increments (coded M)

Uprating of guaranteed minimum pension increments (coded N)?

(c) N.I. Widow's benefits Include Earnings Related Supplement

Yes  
No

NIWIDOWS (489H)		Q05IC	
1	1	1	1
2	2	2	2

- Ask (i) & (ii)  
- Go to 52

(i) What was the amount of benefit you last received?

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

NIWIDAMT (49)  
Q05IC 1

- Ask (ii)

(ii) How long did this cover?

PERC 490 (491) Q05IC 2

Enter period code


If code 9, specify period

Sec (iii)

**INTERVIEWER CHECK**  
Is informant consulting a payment book or other document?

NIWDPYBK (491A) Q05IC 3

Yes  
No

1	1	1	1
2	2	2	2

- Ask (iii) & (iv)  
- Go to 52

(iii) What documents are being consulted?

Buff book only  
Yellow book only  
Yellow and buff book  
Other Specify

NIWDTYBK (491B)		Q05IC 4	
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4

- Go to 52

- Ask (iv)

- Specify below and ask (iv)

(iv) What amounts are shown on documents for

£	p	£	p	£	p

NIWDAPAM (491)  
Q05IC 5

NIWDMPAM (49)  
Q05IC 6

NIWDAPIN (49)  
Q05IC 7

NIWDMPIN (49)  
Q05IC 8  
- Ask 52

Running Prompt

Additional pension (coded J)

Guaranteed minimum pension (coded K)

Additional pension increments (coded M)

Uprating of guaranteed minimum pension increments (coded N)?

To all

28

Refer Informant to Prompt Card N

52 Are you at present receiving any of the state benefits shown on Card N?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	

BENCARDN (4) Q052

Yes →  
No to all →

Code (a) - (d)  
Go to 53

Exclude Income Support/Supplementary benefit from (a) - (d)

Exclude Christmas Bonus from (a) - (d)

WARDIS (4919)		Q052A	
1		1	
2		2	

(a) War disability pension and related State allowance  
Yes →  
No →

Ask (i) & (ii)  
Go to (b)

(i) What was the amount of benefit you last received?

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

WARDISAM (4) Q052A 1

Ask (ii)

(ii) How long did this cover?  
Enter period code →

PERC492	(493)	Q052A	2
---------	-------	-------	---

If code 9, specify period

MOBILITY (493A) Q052B

(b) Mobility allowance  
Yes →  
No →

Ask (b)

MOBLAMT (494) Q052B 1

(i) What was the amount of benefit you last received?

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

Ask (ii)  
PERC494 (4) Q052B 2

(ii) How long did this cover?  
Enter period code →

--	--	--	--

If code 9, specify period

SEVDISAL (495A) Q052C

(c) Severe disablement allowance  
Yes →  
No →

Ask (c)

SEVDAMT (495B) Q052C 1

(i) What was the amount of benefit you last received?

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

Ask (ii)  
PERC495B (4) Q052C 2

(ii) How long did this cover?  
Enter period code →

--	--	--	--

If code 9, specify period

ATTENDNC (498A) Q052D

(d) Attendance allowance  
Yes →  
No →

Ask (d)

ATTENDAM (499) Q052D 1

(i) What was the amount of benefit you last received?

1		1		1	
2		2		2	

Ask (i) & (ii)  
Go to 53

(ii) How long did this cover?  
Enter period code →

PERC499	(500)	Q052D	2
---------	-------	-------	---

If code 9, specify period

Ask 53

To all

Refer informant to Prompt Card O

53 In the last 12 months, that is since....., have you received any of the state benefits shown on Card O?

BENCARDØ (500H) Q053

Yes →  
No to all →

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	

Code (a)-(c) and 54 - See 55

Exclude Income Support/Supplementary benefit from (a) - (c)

Exclude Christmas bonus from (b) - (c)

(a) Statutory Sick Pay from your employer?

Yes →  
No →

SSP (500G) Q053A

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) Q053A 1

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

-Ask (ii)

(ii) Are you receiving Statutory Sick Pay at present?

Yes →  
No →

INA279 (503) Q053A 2

1		1		1	
2		2		2	

- Ask (b)

(b) N.I. sickness benefit

Yes →  
No →

NISICK (504) Q053B

1		1		1	
2		2		2	

-Ask(i)-(iv)  
-Go to (c)

(i) For how many weeks did you receive this benefit?

INA224 (505) Q053B 1

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

-Ask (ii)

(ii) What was the amount of benefit you last received?

NIBEN (506) Q053B 2

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

-Ask (iii)

(iii) How long did this cover?

Enter period code →

PERC506 (507) Q053B 3

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

If code 9, specify period

(iv) Are you receiving benefit at present?

Yes →  
No →

INA225 (508) Q053B 4

1		1		1	
2		2		2	

-Ask (c)

53 (cont'd)

Prompt Card O (cont'd)

CONPEN (509) Q053C

(c) Contributory invalidity pension  
(Include invalidity allowance  
and additional pension)

Yes →  
No →

Per No.		Per No.		Per No.	

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)-(iv)  
- Go to 54

INA258 (510) Q053C 1

(i) For how many weeks did  
you receive this benefit?

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

- Ask (ii)

CONBREC (511) Q053C 2

(ii) What was the amount of  
benefit you last received?

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

- Ask (iii)

(iii) How long did this  
cover?

Enter  
period  
code

PERC511	(512)	Q053C 3
---------	-------	---------

If code 9,  
specify  
period

INA259 (513) Q053C 4

(iv) Are you receiving  
benefit at present?

Yes →  
No →

1	1	1
2	2	2

- Ask 54

To those coded Yes (coded 1) at 53

Others DNA →

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

- See 55

54 Are/were you getting "made up pay"  
from your employer in addition to  
the Statutory Sick Pay, N.I. Sickness  
Benefit or Contributory Invalidity  
Pension you are/were receiving?

Yes →  
No →  
DK →

PAIDSICK	(514)	Q054
1	1	1
2	2	2
3	3	3

- Ask (a)

- See 55

(a) Are/were you being paid every  
week by your employer

or for only some weeks?

Running  
Prompt

INA272 (515) Q054A

1	1	1
2	2	2

- See 55

- Ask (i)

INA267 (516) Q054A 1

(i) For how many weeks are/were  
you being paid?

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

- See 55

To all men aged under 66 and women aged under 61

Per No.		Per No.		Per No.	

£	p	£	p	£	p
---	---	---	---	---	---

DNA. Others → 

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

 - Go to 56

55 In the last 12 months, that is since..... have you taken part in a government training scheme?

GOVTRSCH (516A) Q055

Yes → 

1	1	1
---	---	---

 - Ask (a) - (c)  
 No → 

2	2	2
---	---	---

 - Go to 56

(a) Was it

Training Opportunities Scheme (TOPS) →  
 or Youth Training Scheme (YTS) →

Other? Specify →  
 INA 246 (517) Q055A →

INA 249 (518) Q055B →

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? →

--	--	--	--

- Ask (c)

TRAINBEN (519) Q055C →  
 (c) What was the amount of allowance you last received? →

--	--	--	--

- Ask (d)

(d) How long did this cover? Enter period code →

PERC519 (520) Q055D

If code 9, specify period

(e) Are you receiving benefit at present?

Yes → 

1	1	1
---	---	---

  
 No → 

2	2	2
---	---	---

 - Ask 56

INA273 (521) Q055E →

**Refer Informant to Prompt Card P**

56 In the last 12 months, that is since..... have you received any of the state benefits shown on Card P?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	

BENCARDP (5) Q056

Yes →  
No →

Code (a) - (d)  
Sec 57

**Exclude Income Support/Supplementary benefit from (a) - (c)**  
**Exclude Christmas Bonus from (a) to (d)**

(a) Industrial injury disablement benefit

(Include Reduced Earnings Allowance)

INA205 (522) Q056A 1

(i) For how many weeks did you receive this benefit?

(ii) What was the amount of benefit you last received?

INDDISBN (523) Q056A 2

(iii) How long did this cover?

Enter period code →

(iv) Are you receiving benefit at present?

INA238 (525) Q056A 4

INDDIS (521B) Q056A

1	1	1
2	2	2

Ask (i) - (iv)  
Go to (b)

Ask (ii)

Ask (iii)

PERC 523 (524) Q056A 3


If code 9, specify period

1	1	1
2	2	2

Ask (b)

(b) N.I. Unemployment Benefit

INA222 (526) Q056B 1

(i) For how many weeks did you receive N.I. unemployment benefit?

UBPAYAMT (527) Q056B 2

(ii) What was the amount of benefit you last received?

(iii) How long did this cover?

Enter period code →

(iv) Are you receiving benefit at present?

UNEMBEN (525A) Q056B

1	1	1
2	2	2

PERC 527 (528) Q056B 3

Ask (i) - (iv)  
Go to (c)

Ask (ii)

Ask (iii)

If code 9, specify period

INA223 (529) Q056B 4

1	1	1
2	2	2

Ask (c)

If coded 6 or 7 at 1(b) recode as 3 at 1(b) and ask relevant questions

56 (cont'd)

FIS (529A) Q056C

(c) Family Credit/Family Income Supplement

(i) For how many weeks did you receive this benefit?

(ii) What was the amount of benefit you last received?

(iii) How long did this cover?

(iv) Are you receiving benefit at present?

INA257 (533) Q056C 4

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	
PERC531		(532)	Q056C 3		
1		1		1	
2		2		2	

Yes →  
No →

- Ask (i) - (iv)  
- Go to (d)

INA256 (530)  
Q056C 1

FISBEN (531)  
Q056C 2

Enter period code →

If code 9, specify period

Yes →  
No →

- Ask (d)

(d) Income Support/Supplementary Benefit  
INA228 (534) Q056D 1

(i) For how many week did you receive this benefit?

(ii) What was the amount of benefit you last received?

(iii) How long did this cover?

(iv) Are you receiving benefit at present?

Yes →  
No →

INA229 (537) Q056D 4

SUPBEN (533A) Q056D

1		1		1	
2		2		2	
PERC535		(536)	Q056D 3		
1		1		1	
2		2		2	

- Ask (i) - (iv)  
- Sec 57

- Ask (ii)

- Ask (iii)

If code 9, specify period

- Sec 57



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 58

Refer informant to Prompt Card Q

57 In the last 12 months, that is since..... have you received any of the state benefits shown on Card Q?

BENCARDQ (537C)	Q057
-----------------	------

Yes →  
No to all →

1	1	1
2	2	2

- Code (a)-(d)  
- Go to 58

(a) Maternity allowance

MATALL (537B)	Q057A
---------------	-------

Yes →  
No →

1	1	1
2	2	2

- Ask (i)-(iv)  
- Go to (b)

INA 239 (538) Q057A 1

(i) For how many weeks did you receive this benefit?

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

- Ask (ii)

MATALAMT (539) Q057A 2

(ii) What was the amount of benefit you last received?

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

- Ask (iii)

(iii) How long did this cover?

Enter period code →

PERC 539 (540)	Q057A 3
----------------	---------

If code 9, specify period

(iv) Are you receiving benefit at present?

Yes →  
No →

1	1	1
2	2	2

- Ask (b)

INA 240 (541) Q057A 4

(b) N.I. Maternity Grant/Grant from Social Fund for Maternity expenses?

MATGRANT (541 A)	Q057B
------------------	-------

Yes →  
No →

1	1	1
2	2	2

- Ask (i)  
- Go to (c)

MATGRAMT (542) Q057B 1

(i) What was the total amount of grant you have received in the last 12 months?

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

- Ask (c)

(c) Maternity pay from your employer under the Employment Protection Act

INA 274 (543)	Q057C
---------------	-------

Yes →  
No →

1	1	1
2	2	2

- Ask (d)

Q57 (cont'd)

Prompt Card Q (cont'd)

(d) Statutory maternity pay from your employer or former employer?

Per No.		Per No.		Per No.	

SMP (54: Q057D

£	p	£	p	£	p
1		1		1	
2		2		2	

Yes  
No

- Ask (i)-(iii)  
- Go to 58

SMPWKS (543B) Q057D 1

(i) For how many weeks did you receive this benefit?

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

- Ask (ii)

(ii) During the first 6 weeks, were you paid at the higher rate or lower rate?

Higher rate  
Lower rate  
DK

SMPRATE (543H) Q057D 2

1	1	1
2	2	2
3	3	3

- Ask (iii)

(iii) How many weeks before your baby was expected did you stop work?

SMPSTWRK (543I) Q057D 3

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

- Ask (iv)

(iv) Are you receiving benefit at present?

Yes  
No

SMPBENPR (543D) Q057D 4

1	1	1
2	2	2

- Ask 58

Refer informant to Prompt Card R

58 In the last 12 months, that is since..... have you received any of the state benefits shown on Card R?

Per No.		Per No.		Per No.	

BENCAI Q05

Yes  
No to all

£	p	£	p	£	p
1		1		1	
2		2		2	

Code (a)-(d)  
Go to 59

(a) Death Grant/Grant from Social Fund for Funeral Expenses?

Yes  
No

DEAGRANT (543F)		Q058A	
1		1	
2		2	

Ask (i)  
Go to (b)

DEAGRANT (544) Q058A 1

(i) What was the total amount of grant you have received in the last 12 months?

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

Ask (b)

(b) Christmas bonus?

Yes  
No

PXMASBON (549A)		Q058B	
1		1	
2		2	

Ask (i)  
Go to (c)

(i) What was the total amount of Christmas Bonus you have received in the last 12 months?

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

Ask (c)

(c) Invalid Care Allowance?

Yes  
No

ICALL (551)		Q058C	
1		1	
2		2	

Ask (i)  
Go to (d)

ICALLWKS (551A) Q058C 1

(i) What was the total number of weeks you have received this benefit?

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

Ask (ii)

(ii) Are you receiving benefit at present?

Yes  
No

ICALLPR (551B)		Q058C 2	
1		1	
2		2	

Go to (d)  
Ask (c1)-(c2)

If not receiving at present, ask:

(c1) What was the amount of benefit you last received?

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

Ask (c2)

(c2) How long did this cover?

Enter period code

PERC55IC (551D)		Q058C 4	

If code 9, specify period

Ask (d)

Q58 (cont'd)

Prompt Card R (cont'd)

(d) Any N.I. or State benefit not mentioned earlier?

Per No.		Per No.		Per No.	

OTHBEN (545) Q058D

Yes  
No

£	p	£	p	£	p
1		1		1	
2		2		2	

specify below and ask (i) - (iv)  
Go to 59

Include Job Release Allowance  
War Widows Benefit  
Industrial Widows Pension etc.

INA232 (546) Q058D 1

(i) For how many weeks did you receive this benefit?

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

Ask (ii)

OTHBENAM (547) Q058D 2

(ii) What was the amount of benefit you last received?

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

Ask (iii)

(iii) How long did this cover?

Enter period code

PERC547	(548)	Q058D 3
---------	-------	---------

If code 9, specify period

(iv) Are you receiving benefit at present?

Yes  
No

1	1	1
2	2	2

Ask (iv)

Ask 59

INA233 (549) Q058D 4

59 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?

INA230 (554) Q059A

Yes  
No

TUSICKPY (553)	Q059	
1	1	1
2	2	2

Ask (a) - (d)  
Go to 60

(a) For how many weeks did you receive this benefit?

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

Ask (b)

(b) What was the amount of benefit you last received?

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

Ask (c)

TUSICBEN (555) Q059B

(c) How long did this cover?

Enter period code

PERC555	(556)	Q059C
---------	-------	-------

If code 9, specify period

(d) Are you receiving benefit at present?

Yes  
No

1	1	1
2	2	2

Ask (d)

Ask 60 10

To all

Refer informant to Prompt Card S

60 Are you at the present receiving an income from any of the sources shown on Card S?

Per No.		Per No.		Per No.	

	£	p	£	p	£	p
Yes →	1		1		1	
No →	2		2		2	

PENSINC (5)  
Q060

Ask 61 - 64  
Go to 65

61 An employee pension from a previous employer?

Include pension from previous employer of deceased spouse or relative

EMPENS (565) Q061

Yes →	1	1	1
No →	2	2	2

Ask (a) - (g)  
Go to 62

(a) How much was the last payment?

EMPAMT (565A) Q061A

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

Ask (b)

(b) How long did this cover?

Enter period code →

PERC565A (565B) Q061B

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

If code 9 specify period

Ask (c)

(c) Was tax deducted at source?

Yes →  
No →

EMPTAXDS (565C) Q061C

1	1	1
2	2	2

Ask (d)  
Go to (f)

(d) How much tax was deducted at source?

EMPTAXAM (565D) Q061D

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

Ask (e)

(e) Was the last payment before or after tax was deducted?

Before →  
After →

EMPTAXB A (565E) Q061E

1	1	1
2	2	2

Ask (f)

Q61 (cont'd)

Prompt Card S (cont'd)

Per No.		Per No.		Per No.	

EMPDEDUC (56) Q061F

(f) Were there any other deductions?

£	p	£	p	£	p
1		1		1	
2		2		2	

Yes →  
No →

Ask (i) - (iv)  
Go to 62

(i) What was the purpose of this deduction?

Probe fully


Ask (ii)

EMPDEDAM (5659) Q061F 2

(ii) How much was the deduction?

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

Ask (iii)

(iii) Was the deduction made at source?

Yes →  
No →

EMPDEDS (565H)		Q061F 3	
1		1	
2		2	

Ask (iv)

(iv) Was the last payment before or after the deduction?

Before →  
After →

EMPDEDBA (565I)		Q061F 4	
1		1	
2		2	

Ask (g)

(g) Do you have more than one pension from a previous employer?

Yes →  
No →

EMPMTONE (565J)		Q0619	
1		1	
2		2	

Ask all relevant questions and note details in left-hand margin

Ask 62

62 A pension as a member of a trade union or friendly society?

Yes →  
No →

TUPENS (566)		Q062	
1		1	
2		2	

Ask (a) & (b)

Go to 63

(a) How much was the last payment?

TUPAMT (566A)		Q062A	

Ask (b)

(b) How long did this cover?

Enter period code →

PERC566A (566B)		Q062B	

If code 9 specify period

Ask 63 10

To all

Prompt Card S (cont'd)

63 Annuity or personal pension?

Per No.		Per No.		Per No.	
£	p	£	p	£	p

ANNU Q06

Yes →

No →

ANUAMT (567A) Q063A

1	1	1
2	2	2

Ask (a)  
Go to 6

(a) How much was the last payment? →

(b) How long did this cover? →

--	--	--

Ask (b)

Enter period code →

ANUTAXDS (567C) Q063C

PERC567A	(567B)	Q063B
----------	--------	-------

If code 9 specify 1

(c) Was tax deducted at source? →

Yes →

No →

ANUTAXAM (567D) Q063D

--	--	--

Ask (c)

(d) How much tax was deducted at source? →

(e) Was the last payment before or after tax was deducted? →

Before →

After →

1	1	1
2	2	2

Ask (d)  
Go to 64

--	--	--

Ask (e)

ANUTAX Q063

64 Payment from trust or covenant?

1	1	1
2	2	2

Ask 64

Yes →

No →

TRSAMT (568A) Q064A

TRUST (568)	Q064	
1	1	1
2	2	2

Ask (a) - (c)  
Go to 65

(a) How much was the last payment? →

(b) How long did this cover? →

--	--	--

Ask (b)

Enter period code →

TRSTAXDS (568C) Q064C

--	--	--

If code 9 specify peri

(c) Was tax deducted at source? →

Yes →

No →

TRSTAXAM (568D) Q064D

PERC568A	(568B)	Q064B
----------	--------	-------

Ask (c)

(d) How much tax was deducted at source? →

(e) Was the last payment before or after tax? →

Before →

After →

1	1	1
2	2	2

Ask (d)  
Go to 65

--	--	--

Ask (e)

1	1	1
2	2	2

Ask 65 11



To all

Refer informant to Prompt Card T

65 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 T?

Per No.		Per No.		Per No.	

Yes →  
No to all →

£	p	£	p	£	p
1		1		1	
2		2		2	

- Code (a)-(f)  
- Go to 66

SAVINGS (574) Q065

(a) National Savings Bank (Post Office)

Ordinary Account(s)

Yes →  
No →

SAVINT1 (575F) Q065A

1	1	1
2	2	2

- Ask (i)  
- Go to (b)

SAVAMINI (576) Q065A 1

(i) What was the total interest over the last 12 months?

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

- Ask (b)

(b) National Savings Bank (Post Office)

Investment Account(s)

Yes →  
No →

SAVINT2 (575G) Q065B

1	1	1
2	2	2

- Ask (i)  
- Go to (c)

(i) What was the total interest over the last 12 months?

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

- Ask (c)

(c) Trustee Savings Bank

Ordinary Savings Account(s) and Investment Deposit Account(s)

Yes →  
No →

SAVAMIN2 (576A) Q065B 1

SAVINT3 (575H) Q065C

1	1	1
2	2	2

- Ask (i)  
- Go to (d)

(i) What was the total interest over the last 12 months?

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

- Ask (d)

SAVAMIN3 (576B) Q065C 1







65, (cont'd)

Prompt Card T (cont'd)

(d) Building Society

Per No.		Per No.		Per No.	

Yes →  
No →

SAVINT4 (575I) Q065D

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)  
- Go to (e)

(i) What was the total interest over the last 12 months?  
SAVAMIN4 (576C) Q065D 1

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

- Ask (e)

(c) Deposit and savings accounts with High Street Banks

Yes →  
No →

SAVINT5 (575J) Q065E

1	1	1
2	2	2

- Ask (i)  
- Go to (f)

(i) What was the total interest over the last 12 months?  
SAVAMIN5 (576D) Q065E 1

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

- Ask (f)

(f) Any other savings banks or societies

Yes →  
No →

SAVINT6 (575K) Q065F

1	1	1
2	2	2

- Ask (i)  
- Go to 66

(i) What was the total interest over the last 12 months?  
SAVAMIN6 (576E) Q065F 1

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

- Ask 66

SAVAMIN6 (576E) Q065F 1





To all

Refer informant to Prompt Card U

66 At present do you have any money in any of the investments shown on Card U?

Per No.		Per No.		Per No.	

Include children under 16 at 82

Yes →  
No to all →

£	p	£	p	£	p
1		1		1	
2		2		2	

INVEST (576 Q066

Code (a) - (g)  
Go to 67

Refer to card V and record group codes below

(a) Index-linked National Savings Certificates

Yes →  
No →

INVTYPE1	(576G)	Q066A
1		1
2		2

Ask (i)  
Go to (b)

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT1	(576N)	Q066A 1

Ask (b)

(b) Fixed Interest National Savings Certificates

Yes →  
No →

INVTYPE2	(576H)	Q066B
1		1
2		2

Ask (i)  
Go to (c)

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT2	(576Ø)	Q066B 1

Ask (c)

(c) Save as you earn (National Savings)

Yes →  
No →

INVTYPES3	(576I)	Q066C
1		1
2		2

Ask (i)  
Go to (d)

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT3	(576P)	Q066C 1

Ask (d)





Q66 (cont'd)

Prompt Cards U & V (cont'd)

(d) Save As You Earn (Building Societies)

Per No.		Per No.		Per No.	

Yes →  
No →

£	p	£	p	£	p
1		1		1	
2		2		2	

INVTYI  
Q06

- Ask (i)  
- Go to (c)

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT 4 (576Q) Q066D 1

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

- Ask (c)

(e) Premium Bonds

Yes →  
No →

INVTYPE 5 (576K) Q066E

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)  
- Go to (f)

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT 5 (576R) Q066E 1

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

- Ask (f)

(f) National Savings Income Bonds

Yes →  
No →

INVTYPE 6 (576L) Q066F

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)  
- Go to (g)

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT 6 (576S) Q066F 1

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

- Ask (g)

(g) National Savings Deposit Bonds

Yes →  
No →

INVTYPE 7 (576M) Q066G

£	p	£	p	£	p
1		1		1	
2		2		2	

- Ask (i)  
- Go to 67

(i) In which group on this card does your amount of investment fall?

Enter code from prompt card V

INVAMT 7 (576T) Q066G 1

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

- Ask 67  
09





To all  
57 Refer informant to Prompt Card W

Per No.		Per No.		Per No.	

67 Do you have now, or have you had in the last 12 months, any money in any of the investments shown on card W?

Yes →  
No to all →

£	p	£	p	£	p
1		1		1	
2		2		2	

STKSHARE (Q067)

Code (a) - (g)  
Go to 68

(a) Government gilt-edged stock including war loan after deduction of tax at source?

Yes →  
No →

WARLOAN (578A)		Q067A	
1		1	
2		2	

Ask (i)  
Go to (b)

WARAMT (579) Q067A |

(i) What was the total interest over the last 12 months?

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

Ask (b)

(b) Government gilt-edged stock including war loan before deduction of tax at source?

Yes →  
No →

WRLNBEF (579A)		Q067B	
1		1	
2		2	

Ask (i)  
Go to (c)

WRLNBINT (579B) Q067B |

(i) What was the total interest over the last 12 months?

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

Ask (c)

(c) Unit trusts?

Yes →  
No →

UNITTRST (579C)		Q067C	
1		1	
2		2	

Ask (i)  
Go to (d)

(i) What was the total interest and dividends over the last 12 months?

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

Ask (d)

UNTRSTIN (580) Q067C |



Q67, (cont'd)

Prompt Card W (cont'd)

(d) Local authority securities?

Per No.		Per No.		Per No.	

Yes →

No →

£	p	£	p	£	p
1		1		1	
2		2		2	

LA:

- Ask (i)  
- Go to

LASECINT (580C) Q067D 1

(i) What was the total net interest over the last 12 months?

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

- Ask (i)

(e) Stocks, shares, bonds, debentures, or any other securities **after** deduction of tax at source?

Yes →

No →

STOCKSSH (580A)		Q067E	
1		1	
2		2	

- Ask (i)  
- Go to

STOSHINT (581) Q067E 1

(i) What was the total interest and dividends over the last 12 months?

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

- Ask (f)

(f) Stocks, shares, bonds, debentures, or any other securities **before** deduction of tax at source?

Yes →

No →

STSHBEF (581A)		Q067F	
1		1	
2		2	

- Ask (i)  
- Go to (g)

STSHBINT (581B) Q067F 1

(i) What was the total interest and dividends over the last 12 months?

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

- Ask (g)

(g) Interest from private loans?

Yes →

No →

PRLINT (581C)		Q067G	
1		1	
2		2	

- Ask (i)  
- Go to 68

(i) What was the total interest over the last 12 months?

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

- Ask 68

PRINTAM (581D) Q067G 1



To all

Per No.		Per No.		Per No.	

68 In the last 12 months, that is, since..... have you received rent from property (including the part of your accommodation you sub-let which you told me about earlier\*)?

\*at 14 Household Schedule

£	p	£	p	£	p
1		1		1	
2		2		2	

RENTREC (5) Q068

Ask (a)  
Go to 69

(a) How much did you receive in the last 12 months before deducting income tax but after deducting all allowable expenses?

RENRECAM (582)		Q068A	

Ask 69

69 In the last 12 months, that is, since..... have you received any other unearned income?

UNEARNIN (582A)		Q069	
1		1	
2		2	

Specify source below and ask (a)

Go to 70

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

UNEARNAM (582B)		Q069A	

Ask 70

To all

Refer informant to Prompt Card X

70 In the last 12 months, that is, since..... have you received any of the following allowances shown on Card X?

Yes  
No to all

Per No.		Per No.		Per No.	

£	p	£	p	£	p
1		1		1	
2		2		2	

(a) What allowances have you received

- 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?

Code all that apply

Include - Allowance from a member of the armed forces or merchant navy

Exclude - Allowance from spouse not a member of household or who is an absent spender (See Q71)

ALLTYPE (583)		Q070A	
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6

(b) How much was the last payment?

ALLRECAM (584)		Q070B	

(c) How long did this cover?

Enter period code

PERC584	(585)	Q070C

(d) Are you receiving the allowance at present?

Yes  
No

ALLPRES (585A)		Q070D	
1	1	1	1
2	2	2	2

- As  
- See

- Ask

- Ask (c)

If code 9, specify pe

- See 71

To a married person whose spouse is not a member of household (coded 2 in col 6) or who is absent spender (not ringed in column 10 of Page 1, Schedule A)

Per No.		Per No.		Per No.	

£	p	£	p	£	p

DNA		N		N		N	
-----	--	---	--	---	--	---	--

- Go to 72

71 Have you received any allowances from your husband/wife while he/she has been away?

SPOUSEAL (585B) Q071

Yes →  
No →

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?

SPOUALRE (586) Q071A

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

- Ask (b)

(b) How long did this cover?

Enter period code →

PERC586 (587) Q071B

If code 9, specify period

--	--	--	--

- Ask (c)

(c) (In addition to the allowance mentioned), does your husband/wife pay direct any household expenses?

SPSALDIR (587A) Q071C

Yes →  
No →

1	1	1
2	2	2

- Specify below

- Go to 72

Per No	Household expenses paid	£	p

SPALDIPD (588) Q071C 1

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

OFF USE

- Ask 7:



50

To all

72 In the last 12 months, that is since..... have you received any coke or coal from your present (or former) employer?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	

Yes, Coke →  
 Yes, Coal →  
 No to both →

COAL (594) Q072

Ask (a) & (b)  
 - See 73

(a) What quantity of..... have you received in the last 12 months?

Lbs. →  
 Cwts →  
 Tons →  
 Other measure →

COALLBS	(594A)	Q072A 1
COALCWTS	(594B)	Q072A 2
COALTONS	(594C)	Q072A 3
COALOTH	(594D)	Q072A 4

- Specify below and ask (b)

(b) Was the..... provided free, or did you have to pay something for it?

Free →  
 Pay something →

1	1	1
2	2	2

FREECOAL Q072B

- See 73  
 - Ask (i)

(i) How much did you pay, including any haulage costs?

COALPAY (598) Q072B 1

INB322 (598A) Q072B 2


- See 73

OFF. USE

To all men aged 65 & over and women aged 60 & over

DNA. Others →

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

- Go to 74

73 At present do you have an OAP concessionary pass, permit, tokens or tickets for bus travel (other than the weekly or season ticket you mentioned)?

Yes →  
 No →

CONBUS (598B)		Q073
1	1	1
2	2	2
3	3	3

- Ask (a)

- Go to 74

No concessionary bus travel provision in area →

CONBUSTY (599) Q073A

(a) Is it a..

free bus pass or permit? →  
 half-fare bus pass or permit? →  
 flat-fare bus pass or permit? →  
 bus tokens or bus tickets? →  
 Any other type of concessionary OAP bus pass? →

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

- Go to 74

- Specify below and ask 74

N.B. If more than one scheme in local authority area establish which one informant has

To all

74 During the last 12 months that is since..... have you received any money as a mail order agent or baby sitter?

Per No.		Per No.		Per No.	
£	p	£	p	£	p
1		1		1	
2		2		2	
3		3		3	

Baby sitter →  
Mail order agent →  
No to both →

MAILBABY (60) Q074

- Ask (a) & (b)  
- Go to 75

MLBABAMT (60) Q074A

(a) How much did you earn in the last 12 months?


- Ask (b)  
INA275 (60) Q074B

(b) Are you doing this work at present?

Yes →  
No →

1		1		1	
2		2		2	

- Ask 75

75 During the last 12 months, that is since....., have you paid any income tax direct to Inland Revenue?

DIRTAX (606A) Q075

Yes →  
No →

1		1		1	
2		2		2	

- Ask (a) & (b)  
- Go to 76

DIRTAXAM (607) Q075A

(a) How much did you pay direct in income tax?


- Ask (b)

(b) What was the source of income on which you were taxed?


- Ask 76

76 Has Inland Revenue or DHSS refunded any income tax direct to you during the last 12 months?

DIRTAXR (607A) Q076

Yes →  
No →

1		1		1	
2		2		2	

- Ask (a) - (c)  
- See 77

DIRTXRAM (608) Q076A

(a) How much was refunded?


- Ask (b)

(b) Was this a refund of tax deducted under PAYE?

Yes →  
No →

PAYEREF (609) Q076B

1		1		1	
2		2		2	

- Ask (c)

(c) Was this refund received in respect of either unemployment or redundancy?

Yes →  
No →

REDNREF (610) Q076C

1		1		1	
2		2		2	

- See 77  
- Ask (i)

(i) What was the reason for the refund?


- See 77

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

DNA →

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

- Go to 78

77 Do you pay a regular National Insurance contribution?

Yes →

No →

NICONT (482A)		Q077
1	1	1
2	2	2

- Ask (a) & (b)

- Go to 78

(a) How much was the last contribution you paid? →

NICONTAM (483)		Q077A

- Ask (b)

(b) How long did this cover?

Enter period code →

PERC483	(484)	Q077B

If code 9, specify period

Ask 78

To all

78 Have you paid any N.I. Contributions direct to Inland Revenue or Department of Health & Social Security during the last 12 months?

Yes →

No →

NIDIRECT (610A)		Q078
1	1	1
2	2	2

- Ask (a)

- Go to 79

(a) How much did you pay? →

DIRNIAM (611)		Q078A

- Ask (i)

(i) What was the reason for this direct payment? →


- Ask 79

To all

Per No.		Per No.		Per No.	

79 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

	£	p	£	p	£	p
Private individual and charity	1		1		1	
Private individual only	2		2		2	
Charity only	3		3		3	
No to both	4		4		4	

CHARITY 1 (612A) Q079 1

CHARITY 2 (612B) Q079 2

CHARITY 3 (612C) Q079 3

CHARITY 4 Q079 4

Ask (a) & (b)

Ask (a)

Go to (b)

Go to 80

(a) Has/had the person(s) lived abroad  
for more than 12 months?

	TIMEABRD (613)		Q079A	
Yes	1		1	
No	2		2	
DK	3		3	

Ask (i)

Sec (b)

(i) How much (in pounds) have  
you sent abroad to this person(s)  
in the last 12 months?

ABRDAMT (614)		Q079A 1	

Sec (b)

DK	1		1		1	
----	---	--	---	--	---	--

ABAMTDK (614A) Q079A 2

Sec (b)

(b) How much (in pounds) have  
you sent abroad to this charity  
(charities) in the last 12 months?

CHARAMT (615)		Q079B 1	

Ask 80

DK	1		1		1	
----	---	--	---	--	---	--

Ask 80

CHAMTDK (615A) Q079B 2

To all

80 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 the job is a regular commitment do not enter at 80. Q1 should be coded 1 or 2 and relevant questions should be asked

Per No.		Per No.		Per No.	

Yes →  
No →

£	p	£	p	£	p
1		1		1	
2		2		2	

Record details in grid below  
See 81

ODDJOBS (603) Q080

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 80(a)

RECORD 57

(a) Record details below:-

Enter each time job took place on a separate line  
OJITNO (603B)  
Q080A 2

OJAMT (604)  
Q080A 3

ODDJSTAR (605)  
Q080A 4

Per No.	Ring Item No.	Description of work or advice	Amount of fee for each job		Period covered by fee ENTER PERIOD CODE	If code 9, specify period	Date(s) when job(s) took place Enter dates as two-digit code			
			£	p			FROM Month	Year	TO Month	Year
	1									
	2									
	3									
	4									
	5									
	6									

OJPERNO (603A)



Ask about each dependant under 16

CHPERSNO (617) Q081 1

Child's Per No.		Child's Per No.		Child's Per No.	

DNA. No dependants under 16.....N

See next schedule

81 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?

£	p	£	p	£	p
1		1		1	
2		2		2	

Yes

No

Ask (a) - (c)

Go to 82

CHILDINC (616) Q081 2

(a) What kind of job or income?


(b) Has he/she had this income throughout the past 12 months?

CHINCCON (616A)		Q081B	
1		1	
2		2	

Yes

No

Go to (c)

Ask (i)

CHINCWKS (618) Q081B 1

(i) For how many weeks has he/she had it?


Ask (c)

CHINCAMT (619) Q081C

(c) How much did he/she get last time?


Ask (d)

(d) How often does he/she get it?

Enter period code

PERC619 (620)		Q081D	

If code 9, specify period

Ask (c)

(e) Does he/she usually.....

dispose of (or save) it all himself/herself  
partly dispose of (or save) it and give the rest to you  
give it all to you?

CHINCDIS (620A)		Q081E	
1		1	
2		2	
3		3	

Ask 82

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.





Ask about each dependant under 16

Child's Per No.		Child's Per No.		Child's Per No.	

Refer informant to Prompt Card Y

82 At present do any of your children under 16 have any money in any of the investments shown on card Y?

Yes →  
No to all →

CHINVEST (621B) Q082

1	1	1
2	2	2

- Code (a) -  
- Go to 83

Refer to Prompt Card Z and record group codes below

(a) Index-linked National Savings Certificates

Yes →  
No →

CHINVTY1 (621C) Q082A

1	1	1
2	2	2

- Ask (i)  
- Go to (b)

(i) In which group on this card does your child's amount of investment fall?

Enter code from prompt card Z

CHINVAM1 (621J) Q082A 1

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

- Ask (b)

(b) Fixed Interest National Savings Certificates

Yes →  
No →

CHINVTY2 (621D) Q082B

1	1	1
2	2	2

- Ask (i)  
- Go to (c)

(i) In which group on this card does your child's amount of investment fall?

Enter code from prompt card Z

CHINVAM2 (621K) Q082B 1

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

- Ask (c)

(c) Save As You Earn (National Savings) Include all issues

Yes →  
No →

CHINVTY3 (621E) Q082C

1	1	1
2	2	2

- Ask (i)  
- Go to (d)

(i) In which group on this card does your child's amount of investment fall?

Enter code from prompt card Z

CHINVAM3 (621L) Q082C 1

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

- Ask (d)



Q. 82 (cont'd)

Prompt Cards Y & Z (cont'd)



(d) Save As You Earn (Building Societies)  
Include all issues

Child's Per No.		Child's Per No.		Child's Per No.	
CHINVTY 4		(621F)		Q082D	
Yes →	1	1	1	- Ask (i)	
No →	2	2	2	- Go to (e)	

(i) In which group on this card does child's amount of investment fall?

Enter code from prompt card Z

CHINVAM 4		(621M)		Q082D 1	

- Ask (e)  
CHINVTY 5  
Q082E

(e) Premium Bonds

Yes →  
No →

1	1	1
2	2	2

- Ask (i)  
- Go to (f)

(i) In which group on this card does child's amount of investment fall?

Enter code from prompt card Z

CHINYAM 5		(621N)		Q082E 1	

- Ask (f)

(f) National Savings Income Bonds

Yes →  
No →

CHINVTY 6		(621H)		Q082F	
1	1	1			
2	2	2			

- Ask (i)  
- Go to (g)

(i) In which group on this card does child's amount of investment fall?

Enter code from prompt card Z

CHINVAM 6		(621Ø)		Q082F 1	

- Ask (g)

(g) National Savings Deposit Bonds

Yes →  
No →

CHINVTY 7		(621I)		Q082G	
1	1	1			
2	2	2			

- Ask (i)  
- See 83

(i) In which group on this card does child's amount of investment fall?

Enter code from prompt card Z

CHINVAM 7		(621P)		Q082G 1	

- See 83

TO PUNCHERS	TO PUNCHERS	TO PUNCHERS
END KEYING THIS CHILD	END KEYING THIS CHILD	END KEYING THIS CHILD
KEY NEXT CHILD SEE PAGE 55	KEY NEXT CHILD SEE PAGE 55	GO TO PAGE 58





To all spenders and about each child under 16 in the household

ASSETPNO (635) Q083 1

Per. No.

Use separate column for each person with holding			

83 You have already told me that you or your child(ren) had the following during the last 12 months

Current Account(s) -Page 43 Household Schedule

- \*National Savings Bank ordinary a/c(s) Pages 41 & 55
- \*National Savings Investment a/c(s)
- \*Trustee Savings Bank ordinary savings a/c or investment deposit a/c(s)
- \*Building Society account(s) Pages 42 & 55
- \*Deposit or savings a/c(s) at a high street bank

Ring code for each holding			
1	1	1	1
BNK	CURAC	(635A)	Q083 2
2	2	2	2
NSOR	DAC	(635B)	Q083 3
3	3	3	3
NSIN	VAC	(635C)	Q083 4
4	4	4	4
TSB	AC	(635D)	Q083 5
5	5	5	5
BDG	SOCAC	(635E)	Q083 6
6	6	6	6
BNK	DEPAC	(635F)	Q083 7

NSCERTIL (635G) Q083 8

- Index-linked N.S. Certificates Pages 43 & 56
- Fixed-Interest N.S. Certificates
- Save-as-you-Earn (N.S.)
- Save-as-you-Earn (Building Society) BSSAYE (635J) Q083 11
- Premium Bonds PREMBND (635K) Q083 12
- National Savings Income Bonds
- National Savings Deposit Bonds

1	1	1	1	
2	2	2	2	← NS
3	3	3	3	← NS:
4	4	4	4	← A:
5	5	5	5	← 8:
6	6	6	6	← NS
7	7	7	7	← NS

- Government gilt-edged stock after tax Pages 45 & 55
- Government gilt-edged stock before tax
- Unit trusts
- Local Authority securities Pages 46 & 55
- Stocks, Shares, Bonds, Debentures after tax
- Stocks, Shares, Bonds, Debentures before tax

1	1	1	1	
GILTS	ATX	(635N)	Q083 15	
2	2	2	2	
GILTS	BTX	(635O)	Q083 16	
3	3	3	3	
UNIT	RUST	(635P)	Q083 17	
4	4	4	4	
LA	SECURS	(635Q)	Q083 18	
5	5	5	5	
STKS	HATX	(635R)	Q083 19	
6	6	6	6	
STKS	HBTX	(635S)	Q083 20	

NILASSET (635T) Q083 21

No to all

1	1	1	1	
---	---	---	---	--

Go to next schedule

VALASSET (637) Q083 22

		Per. No.	Per. No.	Per. No.	Per. No.
OFF. USE	Refusal →	1	1	1	1
	Ineligible - less than £1,000 →	2	2	2	2
	Ineligible - more than £10,000 →	3	3	3	3
	Eligible - £1,000 - £10,000 →	4	4	4	4
	Eligible - D.K. any of savings →	5	5	5	5
	Eligible - D.K. some of savings →	6	6	6	6

TO PUNCHERS	TO PUNCHERS	TO PUNCHERS	TO PUNCHERS
END KEYING THIS PERSON AND RETURN TO START OF PAGE 58	END KEYING THIS PERSON AND RETURN TO START OF PAGE 58	END KEYING THIS PERSON AND RETURN TO START OF PAGE 58	Key 85

Ask Q.84 of all spenders who have savings at 83.  
 Ask Q.84 about any children under 16 who have savings at 83.

Married couples (coded 1 or 2 at Q.6 on front page of Household Schedule) should be treated as one unit at 84 i.e. the current value of both their holdings should be added together when answering 84.

All other spenders and children in the household should be treated individually and their amounts at 84 should be entered in separate columns.

84 Thinking of the savings I've just mentioned, would you say that the total current value held by You (and your wife/husband) is your child

Prompt where appropriate

	Husband and wife	Per.No.	Per.No.	Per.No.	
(Yes, the value is) less than £1,000 →	X	X	X	X	- Go to next schedule
(Yes, the value is) between £1,000 & £10,000 →	Y	Y	Y	Y	- Ask 85-93 where relevant
(Yes, the value is) more than £10,000 →	Z	Z	Z	Z	- Go to next schedule 1 2

To all with current bank account(s) at 83

Others. DNA → N - Sec 86

85. At the end of last week/month did you have any money left in your current account after your household expenditure?

Yes → Y - Ask (a)

No → X - Sec 86-93

(a) Roughly how much was left at the end of last week/month?

Use separate line for each account

Per No	Ring Line No.	(a) Amount left £ in account p
	1	
	2	
	3	
	4	

CURACPNO (638) Q085 1

CURACBAL (638B) Q085 3

Sec 86

CURACINO (638A) Q085 2

To all with savings accounts marked "s" at 83

Others. DNA → N - Sec 87

86. How much do you/your child have in each savings account?

RECORD 116

Use separate line for each account

Per. No.	Ring Line No.	Describe account (from Q.83)	Amount in account £ p
	1		
	2		
	3		
	4		
	5		
	6		
	7		
	8		

- Sec 87



To all with Building Society S.A.Y.E. at 83

Others. DNA → N Sec 90

89 (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?

RECORD 11c

(c) How long does this cover?

If answers to (a) - (c) incomplete, ask (d) otherwise see 90

(d) Approximately how much is there in the S.A.Y.E. now?

**Use separate line for each account**

Per. No.	Ring Line No.	(a) When started		(b) Amount of regular payment		(c) Period of payment	(d) Estimated current value	
		Month	Year	£	p		£	p
	1							
	2							
	3							
	4							
	5							
	6							
	7							
	8							

BSAYEPNO (656) Q089 1

BSAYEVI Q08

BSAYEINO (656A) Q089 2

Sec 90

To all with Premium Bonds at 83

Others. DNA → N Sec 91

90 What is the total value of all the Premium Bonds you/your child hold?

RECORD 12

**Use separate line for each person**

Per. No.	Ring Line No.	Total value of all Premium Bonds held	
		£	p
	1		
	2		
	3		
	4		
	5		

PREMBPNO (657) Q090 1

PREMBVAL (657B) Q090 3

Sec 91

To all with National Savings Income Bonds at 83

Others. DNA. → N Sec 92

91 (a) How many National Savings Income Bonds do you/your child hold?

(b) What is the total value of the Income Bonds you/your child hold?

RECORD 121

**Use separate line for each person**

Per. No.	Ring Line No.	(a) Number of income bonds		(b) Total value of income bonds	
		£	p	£	p
	1				
	2				
	3				
	4				
	5				

NSINCPNO (658) Q091 1

NSINCVAL (658B) Q091 3

NSINCINO (658A) Q091 2

Sec 92

To all with National Savings Deposit Bonds at 83

Others. DNA. → N Sec 93

92 (a) In which month and year did you/your child acquire each bond?

(b) What is the total value of the Deposit Bonds you/your child hold?

RECORD 121

**Use separate line for each bond**

Per. No	Ring Line No.	OFF. USE		(b) Acquisition date		(b) Total value of deposit bonds	
		£	p	Month	Year	£	p
	1						
	2						
	3						
	4						
	5						
	6						
	7						
	8						
	9						
	10						

NSDEPPNO (659) Q092 1

Sec 93

To all with government gilt-edged stock, unit trusts, local authority securities, stocks, shares, bonds, and debentures at 83.

Others. DNA  $\longrightarrow$  N Go to next schedule

93. (a) Which securities do you/your child hold?  
(Give as full details as possible)

RECORD 12

(b) How many shares, bonds etc. do you/your child hold of .....?  
(Describe security)

(c) Approximately how much is it worth?

Use separate line for each security

Per. No	Ring Line No.	OFF. USE		(a) Name of security	(b) No. of shares/bonds etc.	(c) Total value	
		£	p			£	p
	1						
	2						
	3						
	4						
	5						
	6						
	7						
	8						
	9						
	10						

Go to next schedule

STKSHPN0 (660)  
Q093 1

STKSHVAL (660B) Q093 3

STKSHINO (660A)  
Q093 2

First check at home:General Points

**1** Is the correct serial number and person number recorded at all relevant points throughout the Income Schedule and its continuation pages?

Yes . . . . . 1

No . . . . . 2 Added/Amended  T

**2** Are all line and column numbers and relevant DNA codes ringed?  
(Exclude those sections you have skipped)

Yes . . . . . 1

No . . . . . 2 Added/Amended  T

**3** Have period codes been entered at all relevant questions?

Yes . . . . . 1

No . . . . . 2 Added/Amended  T

**PERIOD CODES:-**

**[ ENTER AS SINGLE DIGIT ]**

<b>WEEK</b>	<b>1</b>
<b>TWO WEEKS</b>	<b>2</b>
<b>THREE WEEKS</b>	<b>3</b>
<b>FOUR WEEKS</b>	<b>4</b>
<b>CAL. MONTH</b>	<b>5</b>
<b>THREE MONTHS</b>	<b>6</b>
<b>SIX MONTHS</b>	<b>7</b>
<b>YEAR</b>	<b>8</b>
<b>OTHER PERIOD</b>	<b>9</b>



# FAMILY EXPENDITURE SURVEY - 1988

RECORD 113

Off. Use.		C.I.					PERSON (D05) Q0006	
Interviewer use							D	1988
Area	Ser.	Hid	Per No.	7-day period		EXPWK (D06) Q0007		
AREANUMD (D02) Q0003		SERNUMD (D03) Q0004		HHNUMD (D04) Q0005		Ref. No.		
		0		①				

**IN CONFIDENCE**

All the particulars you give on this form will be treated in STRICT CONFIDENCE.  
Please do not put your name and address on it.

The interviewer will call again on:

DAY	DATE	TIME

PLEASE CHECK PAGE 36

FOR INTERVIEWERS USE			
Credit cards at Q. 84 (S838A)	NO	X	Explain Page 36 regarding credit card interest
	YES	Y	

Social Survey Division, OPCS  
St Catherines House,  
10 Kingsway  
London, WC2B 6JP

## HOW TO FILL UP THIS BOOKLET

1. This booklet should contain a complete record of everything which **you yourself** pay for; other members of your household have separate booklets.
2. Please include **everything** that you pay for during the fourteen days, whether it is paid for out of your own money, housekeeping, luncheon vouchers, money from a loan or any other source, and whether payment is by cash, cheque, postal order, giro cheque, credit card, chargecard or other means of payment.
3. Write down the actual payments you make during the fourteen days, even if the goods were obtained previously, or are going to be delivered later. If you buy anything by part exchange, please give the amount paid **after deducting** the amount allowed in part exchange.
4. Show each item, however small, on a **separate line** and the amount spent on it. Please do not, for example, write 'vegetables' but show separately how much you spent on potatoes, cabbages, frozen beans, tinned peas and so on. It is not necessary to write £ and p. signs in columns.
5. If you ask someone else to buy things for you, and you pay for them, details of the purchases should be included in your own booklet.
6. **Credit card acquisitions.** If you acquire any goods or services by credit card "e.g. Access, American Express, Visa, Diners Club". Please record a description of the item and its price and write "CREDIT CARD" beside entry. Please exclude bankers cheque cards.
7. **Credit card account payments.** if you have a credit card i.e. Visa, Access, American Express etc. and you pay all or part of the account during these fourteen days of record keeping, please record any interest shown on the account on page 36.
8. **Chargecard acquisitions.** If you acquire any goods or services on a charge card e.g. Marks and Spencer, Debenhams, please record a description of the item and its price and write "CHARGE CARD" beside entry.
9. **Food, soft drinks and alcoholic drinks brought home.** Please record any food, soft drinks and alcoholic drinks brought home on the left hand pages. Meals, snacks, soft drinks and alcoholic drinks bought and consumed away from home should be recorded on right hand pages.
10. **Where food, soft drink were purchased.** Please record the name of the shop or store where you bought food and soft drink. If you are unsure of the name, please write a brief description e.g. "Corner shop".  
See example on page 4.
11. **Daily shopping items (other than food).** Please enter cigarettes, tobacco, matches, cleaning materials, toiletries, cosmetics, stationery, newspapers, magazines, books, postage and other daily shopping items (other than food). Please record the shop or store where you bought these items. If you are unsure of the name, please write a brief description e.g. "Matches - Corner shop".  
See example on page 5.
12. **Hire Purchase.** If you start buying anything by instalments on any of the fourteen days, write down the amount and state that it is the first instalment, down payment, etc.  
If during the fourteen days you pay instalments on any goods which you are already buying by instalments, write down what the article is and how much you pay.
13. **Budget Accounts, Clothing Clubs, Mail Order Clubs, etc.** If you pay anything into a budget account, clothing club, etc. during the fourteen days, please write each payment down with a description of the account or club into which it is paid. There is no need to record any goods you obtain from these clubs.
14. **Meals, snacks, soft drinks and other non-alcoholic drinks bought and consumed away from home.** Include any food or non alcoholic drinks bought and consumed outside the home. Non-alcoholic drinks include tea, coffee, milk, Horlicks etc. as well as fruit juices and other soft drinks. Even if these are taken on their own please record them here. Also please include breakfast, lunch, dinner, snacks, cups of tea or coffee if these are bought and consumed away from home. Meals, snacks or drinks bought at a workplace should be recorded separately from other meals. If you bought a snack please state what it comprised.  
See example on page 5
15. **Where meals and snacks were consumed.** For meals and snacks purchased at places other than at workplace, please ring code as to whether you eat the food on premises (code 1) or off the premises (code 2).  
See example on page 5.
16. **Beer, wine and spirits and other alcoholic drinks bought and consumed away from home.** Please include alcoholic drinks taken on their own, at pubs, wine bars, clubs, as well as alcoholic drinks taken with meals. Alcoholic drinks taken home should be entered on the left hand page, see 'beer' example, page 4.  
If you have alcoholic drinks with a meal, please list these separately and indicate that they are taken with a meal, see example, page 5.  
Please specify the type of alcoholic drink eg beer, wine, sherry, vermouth, port, spirits, cider, perry, etc.

17. ~~Where alcoholic drink was purchased.~~ Where beer, wine, spirits and other alcoholic drinks are bought and consumed away from home, please ring code as to whether drink was purchased at an off-licensed premises e.g. supermarket, off-licence. (code 1) or ~~somewhere else~~ e.g. public house, restaurant or club (code 2).
18. ~~Take-away meals brought home.~~ Please record on the left hand page any take-away food which you bring home to eat, see 'fish and chips' in example, page 4. Also include Meals on Wheels.  
Please note beside the entry if the meal was served hot.
19. ~~Take-away food consumed away from home.~~ Any take-away food which is either consumed on the premises of the take-away food shop or off the premises but not taken home should be recorded in the Meals out section on the right hand page.  
If consumed off the premises, please note beside entry if the food was served hot.
20. ~~Holiday Expenses.~~ Please say whether holiday is in the U.K. or abroad. (a) If in England, Wales, Scotland or Northern Ireland give payments during the 14 days covered by this record in as much detail as possible; if it is impossible to give each item separately, a single heading (eg hotel bill) will do; (b) If in the Channel Islands, the Isle of Man, the Irish Republic or abroad please do not itemise the expenses, but give the total amount spent in the days covered by this booklet and the country where the holiday is spent. Treat business trips in the same way as holidays but remember to note which items will be refunded.
21. ~~Package holidays.~~ Where expenditure for a package holiday is recorded could you please write "PACKAGE" beside entry.
22. ~~Gifts and Presents.~~ Please say what is bought; and record it on the day of purchase. If money is given, say that it is a present of money, and who received it; for example, 'Present of money to niece' or 'Money to daughter away at university' In particular, please distinguish whether money is given to a member of the household or to someone outside the household.
23. ~~Pocket money.~~ Please say who received it. There is no need to record what it was spent on.
24. ~~Clothing.~~ For any clothing or footwear, including gifts to people please say for whom the item is bought, also the sex and age, eg 'shoes for son, aged 10', see example, page 5.
25. ~~Postal Orders.~~ If you buy a postal order please record it, noting its value and poundage on separate lines. Note beside the postal order the purpose for which it is to be used and the date it will be posted. See example page 5.
26. ~~Shopkeepers, Farmers.~~ If your household obtains any food or other goods from its own shop or farm, please write down what is obtained each day with its approximate value. If these goods were not paid for at the time also write 'own shop' or 'own farm' against each item.
27. ~~Betting.~~ If you make any bets during the fourteen days covered by this booklet, please state what they are (sweepstake, bookmaker, totalisator, Bingo, lottery, etc.) and give the amounts. If you receive any winnings during the fourteen days please give details in question 2 on page 36.
28. ~~Permanent second dwelling.~~ Any expenditure for a permanent second dwelling should be indicated.

Please look through the list shown on page 37 of this booklet, it may remind you of items which you may have forgotten to record.

Please use page 38 for any notes you may wish to make for any explanation of your purchases.



EXAMPLE PAGE

Please write each item on a separate line

Meals, snacks and non-alcoholic drinks (including soft drinks) bought and consumed away from home. Include tips and service charge.

(1) Bought at workplace, canteen, staff dining room, etc.

Snack (Cheese Roll)

Cup of tea

(2) Bought at cafe, restaurant, hotel, fish and chip shop, sandwich bar, public house, school shop, tuck shop, cinema, etc.

Meal out (incl. tips)

Bar of chocolate

Toasted cheese sandwich (hot)

CONSUMED			
ON PREMISES	OFF PREMISES		
1	2	15	00
1	2		25
1	2		75
1	2		

Where purchased

Off Licence Other (Pub, etc)

RING			
1	2	6	50
1	2	1	00
1	2	7	49

Beef, wine, spirits and other alcoholic drinks bought and consumed away from home.

Wine (with meal)

Beer

Whisky

Daily shopping items (other than food) e.g. cigarettes, tobacco, matches, cleaning materials, toiletries, cosmetics, stationery, newspapers, magazines, books, postage etc.

Matches

Toothpaste

Shampoo

Name of shop or store where item bought

Corner shop  
Safeways  
"

07  
37  
15

Clothing, clothing materials and footwear.

Jacket for self (Chargecard)

Shoes for son aged 12

60 00  
17 99

Travel by rail, bus air, taxi, Motor vehicles (purchase, petrol, oil and repairs), Cycles etc.

Bus fare

50

Any other payments made to-day, with full details, e.g. fuel and light (including payments into meters), entertainment, hairdressing, holidays, furniture, household goods, domestic help.

Postal order - football pools - posted Sept 15th

Poundage

Present - doll (Credit card)

Video recorder - monthly rental

50  
21  
10 78  
16 00

ALSO SEE PAGE 36

Amount paid		OFF. USE.	
£	p	Please leave blank	
	30		
	25		
15	00		
	25		
	75		
6	50		
1	00		
7	49		
	07		
	37		
	15		
	60 00		
	17 99		
	50		
	50		
	21		
10	78		
16	00		

Date .....

RECORD OF EXPENDITURE

FIRST DAY

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.

Name of shop or store where item bought	Amount paid		OFF. USE
	£	p	Please leave blank
DCASHPR (D08) Q0008			
DITEMCOD (D09) Q0009			
DQUAL (D10) Q00010			

RECORD 114

DCASHPR (D08) Q0008

DITEMCOD (D09) Q0009

DQUAL (D10) Q00010

Take-away meals brought home, eg fish and chips, take-away Chinese food,  
Meals on Wheels, etc.



**1. Expenses refunded or claimed**

Please give particulars below of any expenditure (eg motor car, travelling, hotel expenses) shown on pages 6-35 in this booklet which:

- (a) have already been refunded by a business or organisation; or
- (b) have already been claimed as expenses from a business or organisation; or
- (c) will definitely be claimed by you in the future as expenses from a business or organisation; or
- (d) will be entered as expenses in making your income tax return.

Date expenditure incurred	Description of business expense refunded or claimed or to be claimed from business organisation.	If food, alcoholic or soft drink brought home Name of shop where bought	Amount refunded or claimed		OFF. USE	
			£	p	PLEASE LEAVE BLANK	
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2
						2

**2. Credit card account payment**

If you have paid a credit card account during the 14 days, please record below any interest (only) shown on the account.

Date of payment	Name of credit card	Amount of interest			
		£	p		
				789	12
				789	12
				789	12

**3. Winnings**

Please give details of any winnings you have received during the 14 days covered by this booklet.

	Winnings in last fourteen days			
	£	p		
Football pools			821	3
Bookmaker, betting shop, totalisator			822	3
Lotteries			823	3
Other betting (Bingo, sweepstake, etc)			824	3



## REFERENCE LIST OF IMPORTANT ITEMS OF EXPENDITURE

Of the hundreds of different things which it is possible to buy, the following is only a list of examples. Please look through this list in case it reminds you of any purchase which you have forgotten to record.

### Food:-

Bread, cakes, buns, biscuits, chocolate biscuits, flour.  
 Breakfast cereals, rice, spaghetti, custard powders.  
 Beef, veal, mutton, lamb, pork, bacon, ham, poultry, sausages, tinned meat, rabbit, offal (hearts, liver, kidney etc).  
 Fresh or smoked cod, haddock, plaice, herrings, tinned salmon, sardines.  
 Milk (fresh, dried, condensed).  
 Margarine, lard, suet, cooking fat.  
 Eggs, butter, cheese.  
 Tea, coffee, instant coffee, cocoa.  
 Sugar, syrup, jam, marmalade, honey, lemon curd.  
 Fresh, dried, frozen or tinned potatoes, chips, crisps, tomatoes, peas, beans, carrots.  
 Fresh, dried, frozen or tinned apples, oranges, plums, pears, peaches, pineapples, apricots.  
 Bottled or tinned tomato juice, grapefruit juice, orange juice.  
 Pickles, sauces, soups, jellies, salt, pepper.  
 Mustard, vinegar, spices.  
 Lemonade, lemon squash, fruit cordials, soda water.  
 Food for animals and pets.

### Take-away meals:-

Fish and chips, Chinese food, Indian food, Fried chicken, Meals on wheels.

### Meals, snacks and non-alcoholic drinks bought and consumed away from home:-

Tea, coffee, snacks, sandwiches and meals bought and consumed at work, in restaurants, cafes, hotels, public houses, in parks, in cinemas.  
 Ice cream, soft drinks, sweets and chocolate.

### Alcoholic drinks:-

Beer, ale, stout, wines, spirits, cider.

### Cigarettes and Tobacco, Newspapers, Magazines, Books, Postage:-

Cigarettes, tobacco, cigarette papers, cigars, pipes, pouches, lighters, lighter fuel, cigarette cases.  
 Books, newspapers, magazines, stationery.  
 Stamps, postal orders, poundage, telegrams, telephone calls.

### Fuel and light, Household goods, Cleaning materials, Furniture:-

Coal, coke, gas, electricity, paraffin and other fuel oil, firewood, candles, nightlights, matches.  
 Soap, soda, cleaning powders, detergents, polishes.  
 Paint, distemper, wallpaper.  
 Dustbins, pails, brushes, brooms, tools, screws, nails.  
 China, glass, bowls, kettles, saucepans.  
 Suites or separate articles of furniture.  
 Radio, television sets or parts, hi-fi, cassettes, pianos, music.  
 Mattresses, pillows, sheets, blankets, tablecloths, towels, curtains, tea cloths.  
 Carpets, rugs, linoleum, mats, floor covering.  
 Fires, cookers, vacuum cleaners, refrigerators, wringers, washing machines, spin-driers, sewing machines, irons, electric lamps, bulbs and fittings.  
 Clocks, watches, jewellery, cutlery, suit-cases, handbags, sports goods.  
 Repairs to furniture, radio, TV and watches.

### Travel:-

Journeys by rail, bus, air, taxi, including fares to and from work.  
 Purchase, repairs and running costs of cars, motorcycles, prams, pushchairs, carrycots.

### Clothing, Clothing materials, Footwear:-

Overcoats, raincoats, suits, costumes, skirts, sports coats, trousers, blazers, slipovers, overalls, aprons, dresses, blouses, hats, gloves.  
 Vests, pants, pyjamas, shirts, knickers, slips, corsets, brassieres, nightdresses, socks, stockings, tights.  
 Dress material, knitting wool, thread, braces, ribbons, scarves, patterns, handkerchiefs.  
 Boots, shoes, slippers, sandals.  
 Payments to clothing clubs.

### Other payments:-

Video rental, hire of cassettes, TV rental.  
 Home computer, TV games.  
 Cameras, photographic materials, developing and printing of films.  
 Flowers, seeds, plants, garden tools, lawnmowers.  
 Animals and pets.  
 Toys, games, playing cards.  
 Shoe repairs, laundry, dyeing and cleaning, domestic help.  
 Football pools and other betting, Bingo, etc.  
 Children's pocket money, birthday presents, money given to charities, raffle tickets.  
 Payments to chemists, doctors, dentists, opticians, chiropodists.  
 Holiday expenses.  
 Purchase of Savings Certificates, Premium Bonds, etc.  
 House purchase, repairs and improvements.  
 Cinemas, theatres, concerts, football, cricket, dog-racing, dances.  
 Lintstick, face powder, face cream, mascara, perfumes, talc, shampoos, sanitary towels, deodorant.

**NOTES.**

Please use the space below for any explanation of your purchases you may wish to make.

**INTERVIEWER USE**

**ASK INFORMANTS**

1.) Are you likely to buy any postal orders in the next two weeks?

No ..... X - Go to 2

Yes ..... Y - Value of postal order and poundage should go on separate line. Purpose and date postal order sent should be recorded.

2.) During the next two weeks, will you make any regular payments to the:

None ..... X  
 No ..... Y  
 Yes

Milkman? X Y →  
 Newsagent? X Y →  
 Football pools? X Y →  
 Window cleaner? X Y →  
 or Any other? X Y  
 SPECIFY

	How often do you pay the ..... ?			THOSE CODED 3: WILL YOU PAY THIS DURING THE NEXT TWO WEEKS?		(✓) IF IN DIARY		DAY USUALLY PAID
	Weekly	Fort-nightly	Other	Yes	No	DAYS 1-7	DAYS 8-14	
	1	2	3	Y	X			
	1	2	3	Y	X			
	1	2	3	Y	X			
	1	2	3	Y	X			
	1	2	3	Y	X			
	1	2	3	Y	X			

**INTERVIEWER NOTE**

If grocery or butchers account to be paid please explain that items must go on separate lines and we need to know if fresh, frozen, tinned etc. and type of meat e.g. pork, lamb, beef. Milk bill e.g. cream, milk, bread etc. should be separated.

3.) Have goods been purchased with credit card or chargecard?

Yes ..... Y - See (i)

No ..... X - Go to 4

(i) Has "credit card" or "chargecard" been written beside each relevant entry?

Yes ..... Y - Go to 4

No ..... X - Probe and enter then go to 4

4.) Has credit card account been paid?

Yes ..... Y - See (i)

No ..... X - No action req'd

(i) Has interest on account been entered on page 38?

Yes ..... Y - No action req'd

No ..... X - Probe and enter if paid.



FAMILY EXPENDITURE SURVEY

SN:2898

TRAILER QUESTIONNAIRE

HOUSEHOLD IDENTIFICATION	AREA	SER.	HHOLD
	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	0 <input type="text"/>
HOUSEHOLD SIZE	TOTAL NO. PERSONS	TOTAL NO. AGED 16+	<-- FOR OFFICE USE -->
	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Individual information (code from front of 'A' schedule)

And ask of those aged 16 or over :

Would you tell me what your religious denomination is ?

							Religious Denomination
PERSON NO.	PERSON NO	OFFICE USE	SEX	AGE	MARITAL STATUS	RELIGION (AGED 16+)	
PERSON NO. 1	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	None ..... -4 Unwilling to answer ..... -3
PERSON NO. 2	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	Catholic ..... 1 Presbyterian ..... 2
PERSON NO. 3	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	Church of Ireland . 3 Methodist ..... 4
PERSON NO. 4	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	Other Protestant .. 5 Other Religion .... 6
PERSON NO. 5	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 6	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 7	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 8	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 9	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 10	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 11	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	
PERSON NO. 12	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	

**FES 1989 DATABASE INFORMATION - THE RELIGION TRAILER**

The religion trailer is used in Northern Ireland, but not in the rest of the United Kingdom. The question was first asked in 1988 and is asked of those aged 16 and over.

The question is asked at the end of the survey to ensure that the household does not refuse to take part solely because they object to being asked their religion. (This is the only question in the survey which is voluntary.)

SHar-1247

KS/