

FAMILY EXPENDITURE SURVEY

Interviewer use			
Area	Ser	Hld	Per No.

Ref No

D 1995

Diary of Expenditure

Please read the notes and look at the examples on page 2 - 7 before you start completing your diary

All the particulars you give in this diary will be treated in **STRICT CONFIDENCE**.
Please do not put your name or address on it.

The interviewer will call again on.

DAY	DATE	TIME

How to complete your Diary

Write down everything you personally pay for during the fourteen days by cash, cheque, postal order, credit card, shop or store card, Switch or Barclays Connect card, or luncheon voucher.

- Make your entries as soon as possible after you get home to make sure you don't forget anything
- Show each item, however small, on a separate line
- After each item enter the amount you spent on it
- If you ask someone else to buy things for you, but you pay for them, include these purchases in your Diary
- If you purchase an item with a credit card (eg Access or Visa), a charge card (eg American Express) or a shop or store card (eg John Lewis), enter the item and the amount paid and then ring the number 3 in the box to the right of the amount paid
- Do not ring the number 3 if you purchase an item with a Switch or Barclays Connect card - just enter the item and the amount paid
- If any item will be claimed as a business expense from, or will be refunded by, a business or organisation, enter the amount to be refunded or claimed in the column headed "REFUNDS" If the item is not to be claimed or refunded, leave the "REFUNDS" column blank.
- If you pay anything into a budget account or mail order club, write "payment into budget account (or mail order club)" and then the amount you pay in. Don't record the goods you obtain from these clubs
- If you are buying anything on hire purchase or credit sale write down the item and the amount of your payment
If you start buying anything on h p during the fortnight note whether this is a first or down payment
- For all food brought home, regular purchases, clothing, any other payments write down in the box provided the name of the shop where the item was bought If it is a small, corner shop write "Corner shop" If it is from a carboot sale write "Car boot"
- If you give someone a present of money or pocket money for them to spend as they choose please state who received the money If the money is for a specific purpose, such as school dinner or travel money, please state the purpose and who received the money

Please remember to start a new page for each day of your Diary

Use the left hand pages of your Diary for

- Food and drink brought home
- take away meals and snacks eaten at home

Please see the examples on pages 4 and 5.

Use the right hand pages for

- meals, snacks and non-alcoholic drinks bought and consumed away from home, including
 - those bought at work or at school
 - those bought at a cafe, restaurant, hotel, pub, sandwich/burger/pizza bar, etc
 - those bought at a shop, supermarket, kiosk, including sandwiches, confectionery, ice cream and soft drinks
- Regular purchases including newspapers, cigarettes, stamps, stationery, cosmetics, toiletries
- Clothing and footwear
- Any other payments including petrol, parking and other motoring expenses, bus and rail fares, household bills, day trips, entertainment, household and leisure goods, domestic help, hairdressing, baby goods, medicines, presents, pocket money, charities, etc

Please see the examples on pages 6 and 7

Use page 38 to record

- Interest shown on a credit/charge/shop/store card account you pay during the fortnight
- Any winnings from betting you receive during the fortnight

On pages 39-41 there is a reminder list of items

Please check the list as it may remind you of things you have forgotten to put in the Diary

1. How to describe the food and drinks you bring home

For some food items we need a detailed description. Look at the examples opposite as well as these notes

Meat and poultry

If uncooked state type of meat and uncooked.

eg beef (uncooked), sausages (uncooked), chicken (uncooked).

If cooked or prepared meat dish state type of product:

eg luncheon meat, chicken pie, shepherd's pie, moussaka.

Fish

If uncooked, smoked, dried, canned or bottled fish no need to state type of fish, just state fish (uncooked), fish (tinned), etc

If prepared fish dish state type of product. eg breaded scampi, cod mornay

Vegetables (including tomatoes)

State type of vegetable and whether fresh, frozen, tinned, bottled or dried
eg onions (fresh), tomatoes (tinned), peas (frozen), instant potato.

If prepared vegetable dish state type of product: eg frozen vegetable lasagne

Pasta

State whether fresh, dried or tinned eg spaghetti hoops (tinned)

Fruit

No need to specify type of fruit, just state whether fresh, tinned, bottled, dried or frozen.

Milk

State whether fresh, dried, tinned, baby milk or cream. If you pay a milk bill which includes items other than milk give the price of each item

Alcohol

State type, eg beer, table wine, sparkling wine, sherry, port, spirits or liqueurs

Drinks (except alcohol)

Itemize separately tea, coffee, food drinks, fruit juice and squash, carbonated drinks (eg lemonade) and mineral water

2. Take away meals and snacks eaten at home

This section covers all hot and cold food bought at a catering establishment and taken home to eat. This will include any meals delivered to your home such as pizzas and meals on wheels. Give a description of the meal (eg Chinese take away) and tick whether it is bought hot or cold

3. Meals, snacks and drinks consumed away from home

- A. In section A include meals, snacks and drinks bought and eaten at a workplace, staff canteen or at school. Just state "Meal/snack at workplace" or "school meal"
- B. In section B include all meals, snacks and drinks bought at a cafe, restaurant, hotel, pub, fish and chip shop, sandwich bar, burger bar, pizza parlour or other catering establishment. State whether "meal", "snack", "beer", "soft drink", etc and tick whether eaten on or off the premises and whether purchased hot or cold. Please show separately any alcohol bought with a meal
- C. In section C include any food or non-alcoholic drink which is purchased from a shop, supermarket, kiosk, etc. which is eaten off the premises but not brought home; for example, a sandwich bought from Marks and Spencer which is eaten at the office. State the type of food, eg sandwich, confectionery, ice cream, soft drink and tick whether purchased hot or cold

4. Regular purchases, eg newspapers, cigarettes, stamps, stationery, cleaning materials, cosmetics, toiletries, batteries, light bulbs

Include here daily purchases such as newspapers, cigarettes and stamps

Also include items you buy regularly for the household such as soap and detergents, deodorants, make-up and other cosmetics; tissues; toiletries, polishes and cleaning materials; matches; kitchen rolls, stationery; and small electrical items such as light bulbs, fuses and batteries

5. Clothing and footwear

Describe clothing item, tick whether for male or female and, if bought for a child under 16, give the child's age

6. Any other payments may include:

- **Motoring expenses and travel costs**
Include petrol, parking fees, oil, parts, bus and rail fares and season tickets,
- **Regular household payments**
Include payments for rent, mortgage, water rates, council tax, electricity and gas (including slot meters), telephone (including coin boxes), insurance premiums, h p instalments, TV and video rental, video cassettes. Also payments for window cleaner, home help, child minder, hairdresser, laundry, dry cleaning, prescriptions, medicines, subscriptions, charity donations
- **Entertainment and Social activities**
Include admission to Bingo, cinema, theatre, clubs and discos, football and other sports, theme parks, museums, exhibitions and stately homes, guide books and programmes, National Lottery stakes (On-line lotto, scratch cards or subscription, from shop, kiosk etc), other betting, car boot sales
- **Lessons and classes**
Include fees for driving lessons and leisure classes or activities such as aerobics, keep fit, DIY, cookery, music and sports lessons. If this is your first payment for the class, write "first payment" after the item
- **Presents of money or pocket money**
Please state who received the money
- **Holiday expenses and business trips**
If on holiday in the UK give each day's expenditure as fully as possible. If you are going abroad, state the total amount of money you are taking, including traveller's cheques and foreign currency, and the dates you will be away

1. Have you paid a credit/charge/shop/store card account during the fortnight?

If you have paid one of these accounts during the 14 days, please record below any interest (only) shown on the account.

Date of payment	Name of credit/charge/shop/store card	Amount of interest	
		£	p
..
..

2. 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
Bingo ..		
UK National Lottery ..		
Insh National Lottery ..		
Other lotteries ..		
Other betting (bookmaker, betting shop, totalisator, etc)		

Reference list

Of the hundreds of different things 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 purchases which you have forgotten to record

Food and drink brought home

- | | |
|---|---|
| Cooked and uncooked meat and poultry | - beef, beefburgers, lamb, pork, bacon, ham, kebabs, liver, kidneys, sausages, chicken, turkey, canned meat, corned beef, liver sausage, pork pie, sausage roll, scotch eggs, shepherds pie, chicken kiev, faggots, moussaka, beefburgers |
| Fish | - fresh, smoked, frozen, canned or bottled. |
| Vegetables and tomatoes | - fresh, frozen, canned, bottled or dried, potato powder, potato waffles |
| Fruit | - fresh, canned, bottled, dried, fruit pies, fruit desserts |
| Milk products | - fresh, other milk and cream, milk baby foods, cheese yoghurt |
| Eggs, butter, margarine | - cooking oils, low fat spreads |
| Bakery purchases | - bread, croissants, flour, biscuits, cakes, buns, crumpets, eclairs, scones |
| Rice, breakfast cereals, pasta | - cereal bars, muesli, spaghetti, ravioli, lasagne |
| Sauces, flavourings, etc | - apple and cranberry sauce, baking powder, curry powder, gravy, herbs, marmite, fresh ginger, garlic, mayonnaise, mustard, oxo, pepper, salad cream salt, spices, tomato ketchup, vinegar |
| Sugar, jam, marmalade | - Syrup, lemon curd, honey |
| Pet food | |

**Regular purchases, eg newspapers, cigarettes, stamps, stationery, cleaning materials
cosmetics, toiletries, batteries, light bulbs**

Newspapers	- magazines
Books	- albums, book tokens, diaries, maps
Cigarettes	- matches, pipe tobacco, cigars, lighters, ashtrays
Postage	- stamps, postal orders, parcel post charges
Cosmetics	- after shave lotion, baby cream and lotion, deodorants, eye shadow, face powder, hair conditioner, lipstick, perfume, talcum powder
Toiletries	- comb, face flannel, hairbrush, manicure sets, nail file, paper tissues, razors, razor blades, shampoos, shaving cream, toothpaste, toilet paper
Soap, detergents	- washing powder, washing-up liquid
Polishing and cleaning materials	- shoe polishing materials, disinfectants, fabric conditioner, air freshener
Small electrical items	- batteries, fuses, light bulbs, plugs, adaptors
Stationery	- pens, writing paper, envelopes, string
Kitchen items	- kitchen rolls, bin liners, aluminium foil, greaseproof paper, plastic cutlery, paper napkins
Clothing, clothing materials and footwear	
Haberdashery	- belts, buttons, handkerchiefs, needles, pins, ties, zips
Dress material	- wool, thread, patterns
Payments to clothing clubs	
Other payments	
Fares	- bus, rail, air and taxi fares, passes and season tickets
Motoring	- petrol, oil, anti-freeze, car polish, car wash, battery water, driving licences, MOT tests, parking fees, tolls and fines, vehicle and bicycle purchase, spare parts, and accessories including windscreen wipers, headlamp bulbs, plugs, car sponge, jack, wrench, servicing and accident repairs
Regular bills	- rent, mortgage, water rates, council tax
Insurance Premiums	- life, death, endowment, structure and contents personal possessions, freezer, car
Fuel bills and purchases	- gas and electricity bills and slot meter payments, coal, paraffin, candles

Other payments

- | | |
|---|---|
| Telephones | - purchase, account payments, coin boxes, telephone cards |
| TV, radio, video recorders, home computers | - purchase, rental and repair; video cassettes |
| Bedding, furniture, curtains and floor coverings | - blankets, sheets, duvets, pillows, mattresses, suites of furniture, carpets, rugs |
| Kitchen and dining equipment | - cookers, microwaves, refrigerators, washing machines, toasters, tableware, cutlery |
| Household appliances | - gas or electric fires, vacuum cleaners, electric lamps, irons, drills, hair dryers, smoke alarms |
| Clocks, watches, jewellery | - purchase and repair |
| Domestic help | - child minders, baby sitters, window cleaners, chimney sweeps, home helps, gardeners, hedge and tree pruners, cleaners |
| Gardening | - lawn mowers, hoses, hedge clippers, watering cans, seeds, flower pots, weedkiller, fertilizer |
| Home improvements and maintenance | - payments to contractor, DIY, paint, wallpaper, tiles, glues, tools, screws, nails, ladders, brushes |
| Photography | - cameras, films, developing charges |
| Leather and travel goods | - suitcases, handbags, umbrellas, wallets |
| Entertainments and sport | - cinemas, clubs, dances, discos, theatres, concerts, admission to football, cricket, horse and greyhound racing; fishing and sports equipment, theme parks, museums and stately homes, programmes and guide books, car boot sales, youth clubs, National Lottery |
| Leisure classes | - driving lessons, classes in cookery, dancing, D-I-Y, riding, aerobics, keep fit, yoga, swimming, music |
| Subscriptions | - magazines, AA, RAC, National Trust |
| Health | - aspirins, cotton wool, prescriptions, sanitary towels, spectacles, payments to chemists, doctors, dentists, opticians, chiropodists, osteopaths, physiotherapists, etc |
| Nursery charges | - Day nursery, creche, nursery school/class |
| Laundry and dry cleaning | |
| Hairdressing | |
| Holiday expenses | - accommodation, travel, car hire, duty free purchases, travellers' cheques, foreign currency |
| Pocket money, presents | |
| Donations to charity, raffle tickets | - church collections, entrance to jumble sale, bazaar, etc |
| Maintenance payments, alimony | |
| Legal and financial services | - payments to barristers, solicitors, notaries, accountants, bank charges |

HOLIDAYS

If you go on holiday during the 2 weeks please give this information.

If you go on holiday in the UK

- Keep your diary as if you were at home

If you go on holiday outside the UK

(including to Isle of Man, Channel Islands and Irish Republic)

please complete this grid (give an estimate if necessary)

Date you leave UK	
Date you return	
Country of visit	
Amount of travellers cheques taken	
Amount of foreign currency taken	
Amount of £ sterling taken	
Amount to be spent abroad using credit cards	
Amount of money brought home	

SPECIAL CIRCUMSTANCES

Were there any special circumstances, such as visitors staying with you or temporary absences of members of your household during the past two weeks?

Yes	→	Y X
No	→	

If yes, please specify special circumstances

INTERVIEWER USE

Are any of these items paid regularly, (ie several times a week, weekly, fortnightly, monthly etc and likely to appear in the diary)? **SHOW REMINDER CARD**

Each box allows for several ticks or spender numbers	Pays		Diary Wk 1		Diary Wk 2		Comments/checked etc	
	No	Yes	paid	unpaid	paid	unpaid		
Milkman								
Newsagent								
Football pools								
Window cleaner								
Other specify (tallymen, mail order, etc)								
Insurances * QLIFE/Linstype QMEDINS/Minstype							Checked	
Electricity meter QSERVICE/Elec Pay								
Gas meter QSERVICE/Gas Pay								
TV meter								
Classes QEDFEES1, QEDFEES 2, QEDFEES 3							Checked	

*If this is a first premium/payment note this in diary beside the payment. If not a first payment, check that entries appear at relevant questions on Household schedule enter as necessary

CREDIT CARDS

Has code 3 been ringed for items purchased with credit card, chargecard, shop card or store card?

Checked

If card account has been paid during record-keeping, has interest been shown on page 38 of diary?

FINAL CALL AND FINAL CHECKS BEFORE POSTING

	FINAL CALL	BEFORE POSTING
Completed diary for each spender? checked >		

Please return completed documents in this order:

"E" forms, permission to recall card and any multi-household sheet attached to person 1's Diary

Diaries for other household members in person number sequence

FURTHER INFORMATION REQUIRED

It would be helpful if you could have the following information and/or documents available for the interviewer when they call next time

.



3 6 3 5'

Interviewer use								
Area				Ser		Hd	Child's Per No (11-19)	
							1	

**FAMILY EXPENDITURE SURVEY
YOUNG PERSON'S DIARY**

THIS DIARY IS CONFIDENTIAL

This diary begins on

and ends on

.

How to complete your diary

- Write down everything you buy

except
things you buy for other people with **their** money.

- Show each item, however small, on a separate line.
- After each item enter the amount you spend on it.
- Remember to complete your diary each day.
- If you are not sure whether to include something, make a note and ask the interviewer.
- If you buy a meal at school, just write "school meal".
- If you buy a meal or snack away from home at a restaurant, cafe, chip shop or other takeaway, simply write "hot meal" or "cold meal".

Here are some examples of things you might buy:

- bus/train fare including to and from school;
- phone calls,
- crisps, sweets, chocolate, ice creams, cans of fizzy drink, cola, lemonade, squash and any other drinks;
- hot or cold meals/snacks away from home,
- school meals;
- T-shirts, jackets, jeans, shoes, trainers, tracksuits, sweatshirts, leggings,
- sportswear, sports equipment, bicycle accessories;
- admission to football and other sports matches, programmes, football scarves, supporters' clubs;
- subs for brownies, cubs, scouts, girls' brigade and other groups;
- riding, swimming, skating and other lessons,
- hobbies such as model making, fishing, photography,
- discos, concerts, youth clubs, cinemas, amusement arcades,
- personal stereo, records, CDs, tapes, computer games, video cassettes,
- magazines, comics, books, pens, posters, stickers,

- toys, board games;
- make-up bags, handbags,
- eye shadow, mascara, mousse, nail varnish, soap, deodorants,
- rings, earrings, necklaces, bracelets, hairbands,
- presents and cards for birthdays, Mother's/Father's Day, Valentine's Day, Christmas.

What did you spend the money on?

How much did you pay?

LEAVE OUT THINGS YOU BUY FOR OTHER PEOPLE WITH THEIR MONEY

Have you remembered everything today?

£

p

Notes

**Interviewer
Code**

1

**Social Survey Division, OPCS
St Cathennes House
10 Kingsway
London, WC2B 6JP**



Social Survey Division

Family Expenditure Survey
1995-96

DIARY
Instructions to Interviewers

INTRODUCTION

- The Diary should be started immediately after the interview if possible and no later than two days after the interview.
- All spenders in a household should start their diary on the same day.
- Each diary should be the individual spender's own account of their expenditure during the fortnight.
- Please assist with any difficulties and make additional calls if necessary.
- A blind person or anyone unable to write should be included as a spender. If their records are kept by someone else in the household check their accuracy by going through the details with the spender in question. Alternatively you may enter the expenditure for that person.
- Please draw the attention of respondents to the notes at the beginning of the Diary, the example pages and the reminder list at the end of the booklet.

General points on completion

Please ensure that informants understand and follow these guidelines:

- Each item should be entered on a separate line and individually priced. The type of items that need to be identified are described on the following pages; but note that it is always better to have too much rather than too little detail.
- Ensure that £ and p signs are not written in, that 00s are entered in the pence column in cases where amounts are given in £s only, that all entries are within the columns and that the 'office use only' column is left blank.
- Respondents should be encouraged to copy information from till receipts into their diary. If respondents have failed to copy itemised till receipts into the diary, you must check the receipt and ensure that every purchase is clearly identified with its price, and whether it was obtained with a credit card. If this is all clearly identified you may staple the receipt to the appropriate page. Ensure that any other purchases that day are fully covered on the diary page. Any till receipts with inadequate information will not be accepted and will be referred back to you.
- All amounts of money spent during the two weeks must be entered, including items covered on the household schedule.
- Only money paid out by the household should be recorded. Goods acquired but not yet paid for (eg on a budget account) should not be shown except where a credit card, charge card, shop card, store card or grocery account is involved (see below).
- Where luncheon vouchers are used, record the total cost of the item, eg meal costs £2.50, luncheon vouchers used have value of £1, additional cost £1.50 - Record £2.50.
- Respondents should not record money transfers between each other members of the household except pocket money given to children.
- Clarify ambiguous or incomplete descriptions such as video, club, insurance.

General points on completion (continued)

• Shop name

The name of the shop or store where a purchase is made must be recorded for all items except take way food and meals out. A point of purchase will not apply to services such as payment of a gas bill, leisure classes, etc. where there is no purchase as such. Purchases at car boot sales are of interest to Consumers Expenditure and should be denoted by the term "car boot".

For purchases at small corner shops or market stalls, the term "local shop" or "stall" is sufficient. However, the following shops must be identified by name:

For food brought home:

Aldi	Lo-cost	Savacentre
Asda	Marks & Spencer	Shoprite
Budgens	Morrisons	Somerfield
Co-op	Netto	Stewarts
Farmfoods	Normans Superwarehouse	Tesco
Gateway	Pioneer	Waitrose
Iceland	Presto	Wellworth
Kwik Save	Safeway	William Low
Leos	Sainsburys	

For non-food purchases:

Sainsburys	Dixons	John Lewis
Tesco	W H Smith	- including
Safeway	Argos	Peter Jones
Marks & Spencer	British Home Stores	Bainbridge
Asda	C & A	Bonds
Woolworths	Threshers	Caleys
Boots	Victoria Wine	Cole Bros
Burton	Superdrug	Heelas
Dorothy Perkins	Granada	Jessop & Son
Debenhams	Mothercare	Knight & Lee
Littlewoods	B & Q	Geo Henry Lee
Co-op	British Gas showroom	Robert Sayle
		Trewins
		Tyrrell &
		Green

General points on completion

- **Grocery account:**
If this will be paid during the fortnight, ask the informant to try to list each item and price separately.

If the respondent can itemise:

They should list on a separate line on the day the bill is paid, each item purchased on the account. (You may, in some cases, have a whole month's groceries listed).

If the respondent cannot itemise:

They should note down on each day any items obtained on this account. Where possible, the informant 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.

- **Shopkeepers and farmers**

If shopkeepers and farmers consume goods which they would normally sell commercially, these goods must be entered. Where the informant actually puts money in the till for the goods, the amount should be recorded.

Where the informant does not put money in the till for the goods then the price s/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.

Credit card payments

- Any item acquired but not yet paid for by credit card, charge card, shop card or store card should be recorded with its price and the number "3" ringed in the appropriate column. Code 3 should not be ringed if the items were acquired with bankers cheque cards or debit cards such as Switch and Barclays Connect where a bank account is automatically debited.

Any interest on these cards should appear on page 38.

Business refunds

- Please ensure that full details of partial or full refunds are entered in the final column. Probe to check whether any employer refunds mentioned at QREFUNDS in the Household Questionnaire or items to be set against tax by the self-employed should be coded as refunds in the diary.

Layout of diary pages

Left hand pages

- Food and drink brought home
(excluding take away meals)
- take away meals and snacks eaten at home

Right hand pages

- meals, snacks and drinks consumed away from home,
including
 - those bought at work or at school
 - those bought at a cafe, restaurant, hotel, pub,
sandwich/burger/pizza bar, etc.
 - those bought at a shop, supermarket, kiosk,
including sandwiches, confectionery, ice cream
alcohol and soft drinks
- Regular purchases including
newspapers, cigarettes, stamps, stationery,
cosmetics, toiletries
- Clothing and footwear
- Any other payments including
petrol, parking and other motoring expenses;
bus and rail fares; household bills; day trips,
entertainment, household and leisure goods,
domestic help, hairdressing, baby goods, medicines,
presents, charities, etc.

Food and drink brought home

Exclude from this section:

- take away meals brought home
- meals on wheels
- **THE NAME OF THE SHOP WHERE THE ITEM WAS BOUGHT MUST BE ENTERED IN THE BOX PROVIDED**
- A total food bill which does not itemise items is unacceptable and will be returned to you for a breakdown of expenditure.

Include:

- **Meat and poultry**

If uncooked meat state type of meat and uncooked: eg beef (uncooked), sausages (uncooked), chicken (uncooked).
If cooked or prepared meat dish state type of product: eg luncheon meat, chicken pie, shepherd's pie, moussaka.

- **Fish**

If uncooked, smoked, dried, canned or bottled fish just state fish (uncooked), fish (tinned), etc.

If prepared fish dish state type of product:
eg breaded scampi, cod mornay.

- **Vegetables (including tomatoes)**

State type of vegetable and whether fresh, frozen, tinned, bottled or dried: eg onions (fresh), tomatoes (tinned), peas (frozen), instant potato.

If prepared vegetable dish state type of product:
eg frozen vegetable lasagne.

- **Pasta (uncooked)**

State whether fresh, dried or tinned:
eg spaghetti hoops (tinned).

- **Fruit**

No need to specify type of fruit; just state whether fresh, tinned, bottled, dried or frozen.

- **Milk**

State whether fresh, dried, tinned, baby milk or cream.
If you pay a milk bill which includes items other than milk give the price of each item.

- **Drinks**

Itemize separately tea, coffee, food drinks, fruit juice and squash, carbonated drinks (eg lemonade) and mineral water.

- **Alcohol**

State the type of alcohol (eg beer, table wine, sparkling wine, sherry, port, spirits or liqueurs).

Take away meals and snacks eaten at home

This section covers all hot and cold food bought at a catering establishment and taken home to eat. This will include any meals delivered to the home such as pizzas and meals on wheels. The respondent should give a brief description of the meal (eg Chinese take away) and tick whether it is bought hot or cold.

Meals, snacks and non-alcoholic drinks bought and consumed away from home

A. In section A include meals, snacks and drinks bought and eaten at a workplace, staff canteen or at school. The informant should note "Meal/snack at workplace" or "school meal". Any alcohol should be separately itemized.

B. In section B include all meals, snacks and drinks bought at a cafe, restaurant, hotel, pub, fish and chip shop, sandwich bar, burger bar, pizza parlour or other catering establishment except meals taken home to eat.

The informant should state whether "meal", "snack" or "soft drink", etc. and tick whether eaten on or off the premises and whether purchased hot or cold. Alcohol should be separately itemized; if this is not possible, a note should be made to the effect that the meal included alcoholic drink: eg meal (including wine).

C. In section C include any food or drink which is purchased from a retail outlet (shop, supermarket) or a kiosk, etc. which is eaten off the premises but not brought home; for example, a sandwich bought from Marks and Spencer which is eaten at the office. State the type of food, eg sandwich, confectionery, ice cream, beer, soft drink and tick whether purchased hot or cold.

Regular purchases

Include and itemize separately:

newspapers, magazines, books, stamps, cleaning materials, cosmetics, detergents, toiletries, kitchen stationery, other stationery, small electrical items such as bulbs and batteries. Give the name of shop where purchased.

Clothing and footwear

The respondent should enter the clothing item in the male or female column, as appropriate, and if bought for a child under 16, give the age of the child. Give the name of shop where purchased.

Any other payments

Include

- **Motoring expenses**
state type of vehicle and itemize separately petrol, parking fees, oil, diesel oil, spare parts; servicing; subscriptions to motoring organizations.
- **Travel costs**
state whether bus or rail fares; one day travelcard; for season tickets state type of transport;
- **Betting, bingo, etc.**
Include all betting stakes, admission to Bingo, horse and greyhound race meetings, race cards, etc. Any winnings from betting should be entered on page 38.
- **Entertainment**
Include and itemize admission to cinema, theatre, disco, night club, concerts, football and other sports events; day trips to themeparks, museums, stately homes; programmes and guide books; car boot sales (code admission and purchases separately).

Clubs: be specific, e.g. is 'golf club' a payment for membership, green fees, a five iron?

- **Leisure classes and tuition**
If any payments are entered in the diary which do not appear at QEDFEES2 in the Household Schedule, check for any payments made in the 3 months before the interview and ensure these are entered at QEDFEES2. If no payments were made note "first payment" against the diary entry.

Any other payments

- **Household bills**
Remind informants that all household bills paid during the fortnight should be entered including items covered at Household Schedule questions.
Amounts set aside to pay future bills should be noted as 'set aside'.
- **Slot meter payments**
State whether for gas, electricity, etc.
- **Deposits**
State what the deposit was for and whether it was towards a cash purchase or a credit acquisition.
- **Instalments on credit agreement, mail order and insurance premiums**
If any payments are entered in the record book which do not appear in the household questionnaire, check whether instalments were being paid at the date of the interview. If they were being paid, enter details at the relevant question on the Household Schedule; if not, note in the Diary that it is a "new commitment".
- **Household goods**
For items such as cookers, fires, refrigerators, water heaters state whether payments are deposits, instalments or full payments; and whether the appliance is fuelled by gas, electricity, etc.
- **Home maintenance, improvements and installations**
Probe whether payments are to contractor or for DIY; if DIY obtain a breakdown of the costs of materials.
- **Expenditure on other dwellings**
Where there is expenditure on another dwelling, note whether this is a permanent second dwelling, eg holiday home, or accommodation to which all or part of the household will be moving, ie a new main dwelling.

Specify type of expenditure on other dwelling in full and note 'second home', 'new main home' by each item.

For timeshares, specify whether in the UK or abroad.
- **Health expenditure**
Itemise expenditure on prescriptions, spectacles, medical goods; state whether payments to doctors, dentists, opticians, osteopaths, etc. are NHS or private.
- **Household services**
Itemise payments for gardeners, window cleaners, baby sitters, child minders, nursery and playshool expenditure, hairdressing, cleaning, repairs to goods.

Any other payments

- **Gifts and presents**
If a gift/present is not cash specify the item purchased.
- **Pocket money**
There is no need to record exchange of cash between spenders in the household, but pocket money to children should be entered with the child's person number.
- **Shop name**
For all purchases from shops or stores give the name of the shop. For small corner shops, the term "local shop" is sufficient. For purchases at car boot sales the respondent should enter "Car boot".

Interest on credit cards

If a credit card, charge card, store card or shop card account is partly or fully paid during the 14 days record keeping period, any interest shown on the account should be recorded in Box 1 on page 38. Any annual standing charge shown on the account should be excluded.

• Holiday expenditure

For all holidays state where the holiday will be taken.

- **Advance holiday payments**
All expenditure in preparation for the holiday, eg the deposit, final payment or purchase of travellers cheques or foreign currency should be recorded if it occurs during the 14 days.

Bank charges for travellers cheques or foreign currency should be itemised separately.
- **Holidays starting AND ending during record keeping**
IF IN UK:
Respondents should be asked to keep diaries as if they were at home, ie itemize all expenditure.

IF ABROAD:
Informants should be asked to record daily totals spent and should make it clear in which currency totals are recorded.
- **Holidays starting during record keeping BUT ending after record keeping period finishes**
IF IN UK:
Attempts should be made to persuade them to keep records while away for the relevant days.

IF ABROAD:
Respondents should be asked to record on page 42
 - The date of departure.
 - The number of days they will be outside the UK.
 - The amount of travellers cheques and currency (£ sterling equivalent) they will take.
 - The estimated value (£ equivalent) of any ordinary bank cheques they will write outside the UK.
 - The estimate of any credit card purchases they will obtain outside the UK.
 - Whether

Special circumstances

At the end of record-keeping, details of special circumstances should be recorded on page 42.

Examples include someone leaving unexpectedly or visitors staying.

Checks on regular expenditure

Complete the checks on page 43 at the checking and final calls using the reminder prompt card.

Further information required

Page 44 is for you to note what further information you require from the informant. Precarbonised pads of this section will continue to be available if required.



Social Survey Division

Family Expenditure Survey
1995-96

DIARY
Keying and Editing Instructions

**These instructions should be read in conjunction
with the Diary Instructions for Field Interviewers**

FES DIARY

KEYING AND EDITING INSTRUCTIONS

<i>Contents</i>	<i>Page</i>
1. Introduction to FES.....	2
2. Layout of diary pages.....	4
3. Responsibility for keying and coding diaries.....	5
4. Keying Instructions	
4.1 Accessing case and serial numbers.....	6
4.2 Accessing diary using F5.....	8
4.3 Keying expenditure items: general instructions.....	9
4.4 Where and how to key expenditure information.....	10
Day.....	11
KeyText/Coding dictionary.....	12
KeyText/Hierarchical coding frame.....	14
KeyText/Items in wrong place.....	15
KeyText/No expenditure.....	16
Paid1.....	17
Credit.....	17
Qualif.....	18
ChildD.....	19
Refnd1.....	20
Shop.....	21
AnyMore.....	23
AnyInt/AnyWin.....	23
4.5 Running checks.....	23
4.6 PAB_DONE/Saving diary.....	27
5. Verification Instructions	
5.1 General procedures.....	28
5.2 Verification of monetary amounts.....	29
5.3 Signing off cases.....	30
6. Incomplete information and coding points	
6.1 Food and drink brought home.....	31
6.2 Regular purchases.....	32
6.3 Take away meals brought home.....	32
6.4 Meals bought and consumed away from home.....	32
6.5 Alcohol.....	33
6.6 Private catering.....	33
6.7 Clothing and furniture.....	33
6.8 Cash gifts.....	34
6.9 Expenditure abroad.....	35
6.10 Vehicles.....	37
6.11 Mail order payments.....	37
6.12 Any other payments.....	38
7. Procedures for London editors.....	39
8. Suggestions and procedures.....	42

1. Introduction to FES for new editors

! The Family Expenditure Survey is a continuous sample survey of household expenditure, which has been carried out since 1957.

! Over 7,000 households in Great Britain and Northern Ireland participate in the survey each year.

! The survey's main purpose since it began has been to provide information on spending patterns for the Retail Prices Index (RPI).

! The RPI is used widely as a measure of the rate of increase in the price of goods and services that people buy, i.e. the rate of inflation.

! The pattern of household expenditure is measured on the FES in two ways.

A questionnaire covering regular expenses such as rent, mortgages, insurance, fuel, vehicles, loans, holidays and education costs is completed for each household.

Each person aged 16 or over is required to keep a diary for a fortnight in which they record everything that they pay for. Children aged 7-15 are also asked to keep a diary, although a refusal by a child does not invalidate the information collected for the adults in the household.

! FES respondents are also asked to give information about their income on an Income Questionnaire. This is used to measure the take-up of state benefits and to predict the effect on households of changes to taxes and benefits.

! Information for the Household and Income Questionnaires is captured by field interviewers on laptop computers using Computer Assisted Personal Interviewing (CAPI). The average interview lasts for an hour and a half.

- ! Expenditure over a two week period is then recorded by respondents in a paper diary. Interviewers call back on the respondents after 3-5 days to ensure that diaries are being completed accurately.

- ! At the end of the fortnight the field interviewers return to the household to pick up the diaries. At this stage they attempt to resolve any discrepancies relating to incomplete or ambiguous information.

- ! From May 1995 the diaries will be returned direct to the Telephone Unit in Titchfield where they will be booked in and placed in covers. The fact sheets containing key information from the household and income questionnaires will be attached to the covers. The cases will then be passed to editors in Titchfield for keying and, in 10% of cases, verification.

- ! Keyed diaries are sent to FES Field Office, London, for editing of the Household and Income Questionnaires. Cases are usually sent on Thursday.

2. Layout of paper diary pages

Adults (those aged 16 and over) use a paper diary in which different types of expenditure are recorded in separate sections. The layout of diaries for children aged 7-15 is much simpler: items are not categorized by type of expenditure.

The layout of adult diaries is as follows:

Left hand pages

- 1 Food and drink brought home
(including alcohol brought home; excluding take aways)
- 2 Take away meals and snacks **eaten at home**
(includes take aways delivered and meals on wheels)

Right hand pages

- 3 Food from catering establishments including meals, snacks and non-alcoholic drinks bought and consumed **away from home:**
 - 3A those bought at work or at school and whether hot or cold (including school dinner money)
 - 3B those bought at a cafe, restaurant, hotel, pub, and other catering establishments by where consumed and whether hot or cold
 - 3C those bought at a shop, kiosk and other non-catering outlet, and whether hot or cold (including confectionery, ice cream and soft drinks which need to be separately coded)

(The amount of detail required for the take away meals and meals out is partly to allow comparison of data with estimates from the National Food Survey.)

- 4 Regular purchases
(this includes newspapers, cigarettes, stamps, stationery, cosmetics, toiletries)
- 5 Clothing and footwear, by sex and, if under 16, age.
- 6 Any other payments including petrol, parking and other motoring expenses; bus and rail fares; household bills; day trip entertainment, household and leisure goods, domestic help, hairdressing, baby goods, medicines, presents, charities, etc.

3. Responsibility for keying and editing the diaries

- ! The diary input and editing is in CAPI. One editor is responsible for coding and keying monetary amounts. In 10% of cases a second editor will verify the monetary values. The cases to be verified are determined by supervisors and will be selected using a program called PICK (see separate instructions).
- ! The first editor is responsible for keying the monetary amounts, including refunds, from the paper diary into the Blaise questionnaire.
- ! The expenditure item codes are selected by the first editor using computer-assisted coding. Most items will be coded from a coding dictionary; but take away food and meals bought/ consumed away from home and all alcohol items **must** be coded using the hierarchical coding frame.
- ! In 10% of cases a second editor is responsible for rekeying the monetary amounts in order to verify accuracy of the initial keying.
- ! The **first** editor also runs range checks for improbably large amounts, and on the paper diary identifies codes which replicate household expenditure items.
- ! Accuracy is of paramount importance. If you are uncertain about any aspect of keying or verification, or have doubts about the veracity of information on the paper diary, please discuss with your supervisor immediately: do not guess.
- ! Any problems with keying or editing the paper diary should be referred by a supervisor to the FES team in London:

The contacts are:

Procedure/technical problems: **FES Research**
Bob Sullivan (ext 2190)

Coding advice/
Currency conversion: **FES Field (editing)**
Lynne Rhodes (ext 2395)

Flow of cases/
persistent coding problems: **FES Field Officer**
Chris Goodger (ext 2306)

4. Keying instructions

4.1 Accessing case and keying serial number

Editor 1 should take these steps:

! Ensure that the serial number on the hard cover and the fact sheet agrees with the number in the Interviewer Use box on the front page of the paper diary. If it does not, refer to supervisor.

! Follow local instructions for getting to the Blaise menu.

! On the menu screen select **<Examine form>**.

! This will bring up a screen with four variables which are the complete serial number for the case:

AreaNum (this is the quota number)
AddrNum (this is the address number within the quota)
HHNum (this is the household number at the address)
PerNum (this is the number of the person within the household)

! You are then ready to enter the serial number. Please do this **very carefully** as any errors may lead to a lot of additional work for both SCB and editing staff.

! Enter the number shown in the area box on the paper diary at **AreaNum** on the Blaise diary.

! Enter the number in the Ser box on the paper diary at **AddrNum** on the Blaise diary.

! Enter the number in the Hld box on the paper diary at **HHNum** on the Blaise diary. This number will usually be 1 and should not be greater than 3. If the number shown on the paper diary is 0 check with supervisor (it will usually mean that the number should be keyed as 1).

! Enter the number in the Per box on the paper diary at **PerNum** on the Blaise diary. For adults the number will be 1-10, for those under 16 the number will be 11-20. Take **extra** care when keying the person number because you will be routed to different questions depending on whether an adult or a child's person number is keyed.

! If you have entered a serial number which is not on the database a message will come up "**Key not found**". Contact your supervisor who will ring London for advice.

! If you have entered a correct serial number additional questions will appear on screen:

PABEd1 (this is the first editor's number)
PABEd2 (this is the second editor's number)
CheckMe1 (this is for running the range checks)
IntBox (this is routed on under 16 diaries only)
PAB_DONE (this indicates the current status of the case)

! At **PABEd1** enter your own interviewer authority number (numbers outside the range 4000-4999 will not be accepted).

! Leave **PABEd2** blank by pressing the Enter/Return key.

! At **CheckMe1** you will be asked if you want checks switched on. Code 2 (no) at this stage, but remember you **must** run the checks before signing off the case.

! At **CheckMe1** an error message will appear. Suppress this (Shift + F3) at this stage.

! **IntBox** will be routed if you are working on a diary of a 7-15 year old (ie if you have keyed 11-20 at **PerNum**). Look at the back cover of the child's diary to check whether the number "1" has been ringed at the top of the page - if it has, the field interviewer should have made a note to the effect that they believe that the child's usual pattern of expenditure was altered because they were actually keeping a diary.

Whether or not there is a note, if the number "1" is ringed code 1 at **IntBox** and attach a query slip to the outside of the hard file cover to bring it to the attention of London editors.

! **PAB_DONE** should be coded 2 (no) at this stage. **PAB_DONE** must never be coded 1 (yes) until initial coding has been completed. On completion of coding, editor 1 should return to **CheckMe**, re-code this to 1 (yes) and run the edit checks by pressing END (see 4.5 below). When these have been run and resolved return to **PAB_DONE** and code 1 (yes), or 5, 6 or 7 (if nil expenditure).

4.2 Accessing diary using F5

This procedure should be used only if agreed with your supervisor.

- ! Instead of keying the serial number it is possible to select the diary form from a list of serial numbers using the F5 key.
- ! Go into <Examine form> as above.
- ! When the serial number block appears hit F5.
- ! A list of serial numbers will appear. The numbers are made up of Area, Ser, Hld and Per Nos.
- ! The layout of the numbers can be quite confusing. A leading zero appears as a blank except for the Hld field which is always one digit; and there is no clear space between the various sub-fields. So the serial number which appears on the paper diary as 1519 (for Area) 16 (for Ser) 01 (for Hld) and 01 (for Per) will be shown on the Blaise list as 1519161 1.
- ! To select the number you want move the cursor to it and press ENTER. The diary will appear with the serial number completed.
- ! From PABEd1 proceed as above.

4.3 Keying expenditure items: general procedures

Detailed notes about incomplete and unclear data are covered in section 6.

! Every row of the diary starts by you entering the diary day (1-14)

! You must press ENTER to confirm any answer **unless** the answer completely fills the answer field, in which case you will jump to the next question. If you accidentally press ENTER after one of these answers, you will jump too far. If you think this has happened, arrow up to check that the previous question has been filled.

! We must not have any empty rows in between filled rows in the Blaise diary. If you miss a row completely it is acceptable to fill it in using information from later in the paper diary, preferably from the same day, but if this is not possible from a later day (in which case the correct number must be entered at the variable **Day**).

If you have to do this write a clear note in red ink on the paper diary at the point where the transferred item has been keyed to ensure that the verifying editor does not key items out of sequence.

! Generally, if you key anything into the Blaise diary out of sequence to the paper diary it is **essential** that you make a clear note or amendment on the paper diary so that the verifier knows what you have done.

! If a paper diary entry needs to be amended, it should be crossed through in red and re-written, in red. Do not use Tippex or pencil.

! Specific points about completing questions on the Blaise diary are covered below. If anything is not satisfactorily covered or you are in any doubt about procedures, please check with your supervisor.

4.4 Where and how to key expenditure information

Variables (questions) on the Blaise questionnaire

Day	This is where the day of payment is entered.
KeyText	This is where the description of the item is entered and computer-assisted coding is used to assign the correct expenditure code.
Paid1	This is where the amount paid for the item is keyed.
Credit	This records whether an item was paid for with a credit, charge, shop or store card.
Qualif	This is used to identify goods consumed by shopkeepers or farmers from their own business, and non-business refundable expenditure, such as informal payment of bus fares and meals out.
ChildD	This is new for April 1995 and is routed only on adult diaries (ie if PerNum is keyed 1-10) and only if the codes for school meals, state school travel or pocket money are selected. The field is coded if money is being given to a child in the household who is keeping a diary.
Refnd1	This codes the amount of expenditure, if any, that is refunded for business purposes. The field is also used by London editors for abatement (reduction or deletion) of amounts because of information recorded in the Household or Income questionnaires.
Shop	This records where the item was purchased. It applies to most expenditure items, but is not routed for meals out or services (housing costs, utilities, etc.). It is not routed on diaries for those under 16.
Paid2 Refnd2	These fields are only used by the verifying editor.

Day

- ! At this question enter the day in the fortnight that an item is bought, e.g. for a purchase on page 8 of the paper diary you would key 1 at **Day**.

- ! If there is no purchase for a particular day do not enter a number at Day and do not leave a blank row between filled rows.

KeyText

- ! Enter a description of the diary item, eg cooked ham, mens shoes.
- ! Press ENTER.
- ! You will be taken into the computer-assisted coding (CAC) box.

Using the coding dictionary

- ! For certain types of purchase you may then access the coding dictionary to get a match for what you have keyed by pressing F1.

The best match may be the answer the cursor alights on. However, there may be a better match among other answers close by - if so, move the cursor to this. When you have chosen the correct match press ENTER.

- ! At the foot of the CAC box a 6 digit code will appear with a broad classification of the type of expenditure that you have selected. It is important that you check this as some words may be classified under more than one expenditure heading, eg "nuts" may be food, materials for home maintenance ("nuts and bolts"), or even coal.
- ! If you are satisfied that your coding choice is correct press ENTER. The code will automatically be entered in the second **KeyText** box.

Wrong code selected

- ! If, after selecting the code you realize that you have described the item wrongly and therefore picked the wrong code:

Return to the KeyText field containing the code and press the SPACEBAR once. This will delete the code and return you to the hierarchical coding frame top level. To edit the text description press F2; this will place the cursor against the word "description" at the foot of the CAC box. Key in the correct description, then press ENTER, then F1 to find a correct match.

KeyText (continued)

Incomplete code

! Occasionally, if you mis-key, you may see this message at the foot of the CAC box:

< Incomplete code OK? Y/N >

Always key N (no). An incomplete code is never acceptable.

If you are unsure how to proceed, refer to your supervisor immediately.

! **The coding dictionary (F1) may be used for the following types of expenditure ONLY:**

Those in sections 1 on the left hand page and sections 4, 5 and 6 on the right hand page of the paper diary, viz.

1. Food and drink brought home (except alcohol)
4. Regular purchases
5. Clothing and footwear
6. Any other payments today

The coding dictionary MUST NOT be used to code items in sections 2 and 3 of the adult paper diary, or items identified as school meals or hot or cold meals/snacks on a child's diary.

KeyText (continued)

Using the hierarchical coding frame

- ! On an adult diary, take away meals (section 2 of paper diary) and food and drink bought and consumed away from home (sections 3A, 3B and 3C) must be coded using the hierarchical coding frame. You should also use the hierarchical coding for any alcoholic drinks in section 1 or 3.
- ! Hierarchical coding may also be used to assign a code for an item in any other section which cannot be found using dictionary coding.
- ! With hierarchical coding, when the CAC box comes up, you code from this instead of hitting F1.
- ! There are three levels of codes. The first is the broad area of expenditure (e.g. 03 for food); the second is the sub-category of expenditure (e.g. 03.12 for take away meals eaten at home); the third is the detailed individual code (e.g. 03.12.01 for hot take away meals eaten at home). Occasionally, not all hierarchical codes at one level will appear on the same screen; use PageDown to access the continuation screen.
- ! In adult diaries (PerNum 1-10) for items in section 2 and 3 of the paper diary, type 03 for food. This will bring you to the second level of codes. Type second level codes as follows:

Item	Category	Second level code
2	Take away meals eaten at home	12
3A	Meals bought at work, school	13
3B	Meals bought at catering establishment	14
3C	Meals bought at shop/other outlet	15

- ! After keying the second level code you will be taken to the third level. Enter the correct third level code. Check that the full six number code at the foot of the CAC box is correct. For example, a hot take away meal eaten at home should be code 03.12.01. If you are satisfied that the code is correct press ENTER.

KeyText (continued)

Using the hierarchical coding frame (cont)

! With alcohol the key distinction is between alcohol bought at off-licensed premises and alcohol which is both bought and consumed on licensed premises. Alcohol brought home will be in section 1 of the paper diary, alcohol consumed away from home will be in section 3A or 3C.

! **Children's diaries**

The following items in children's diaries must be coded hierarchically:

school meals	03.16.01
hot meal/snack away from home	03.16.02
cold meal/snack away from home	03.16.03

If it is not clear whether a meal is at school or not, a decision should be made based on whether it is a school day and the price.

Items such as ice creams, sweets and soft drinks should not be coded 03.16 but should be coded using the dictionary (F1).

Adult codes 03.12, 03.13, 03.14 and 03.15 must not be used in children's diaries.

! If, before pressing ENTER, you find that you have selected the wrong code you can return to the higher level codes by pressing the BACKSPACE key, and then select the correct code.

Items in the wrong place

! Respondents sometimes put items in the wrong section of the paper diary. This is only really a problem if the item needs to be coded hierarchically, ie for take aways and meals away from home. Items in those categories should be clearly transferred to the appropriate place on the paper diary. Other items do not need to be transferred.

! To avoid keying and verification problems, you are advised to check each page of the paper diary for correct placing of items **before** you start keying that day.

KeyText (continued)

No expenditure

- ! Occasionally there will be no expenditure at all perhaps because a partner is housebound and the other pays for everything; or a child who is keeping a diary doesn't actually spend anything.
 - ! Check page 42 of the paper diary to see if the interviewer has explained the circumstances. If there is no explanation refer to your supervisor, who should contact Research in London for advice if necessary.
 - ! If you have a diary with nil expenditure don't key anything on the main diary pages but go back to **PAB_DONE** and code 5 "Nil expenditure".
- ! Sometimes there will be no expenditure either in Week 1 (days 1-7) or Week 2 (days 8-14). In this case, key the expenditure in the usual way. On completion return to **PAB_DONE** and code either 6 (Nil expenditure Week 1) or 7 (Nil expenditure Week 2).

Inadequately described items

Instructions for these are covered in section 6.

Paid1

- ! Enter the payment shown in the "amount paid" column for the item in Paid1. The amount should be entered in pence, eg ,52.30 should be keyed as 5230.
- ! If there is a doubt as to whether the amounts recorded are ,s or pence, refer to your supervisor.
- ! Check whether money spent abroad is in , sterling or foreign currency. If it is the latter, you will need to ring Lynne Rhodes (ext 2395) who will work out the conversion to , sterling. Do **not** key any amount that is in foreign currency, until this has been converted to , sterling.
- ! If the amount paid is missing, refer to your supervisor.
- ! You may find a case where a till roll has been attached to the paper diary but items have not been transferred to the diary pages. From April 1995 this will be acceptable but **only** if there is sufficient detail to identify the exact type of purchase, the date of purchase, the shop, the amount and whether a credit card was used. Till receipts with insufficient detail should be referred to your supervisor who will arrange for the case to be returned to the field interviewer.

=====

Credit

- ! Check the column headed "CREDIT" on the paper diary to see whether the item was bought with a credit, charge, shop or store card.
- ! If the number 3 is ringed against the item in the paper diary, key 1 at **Credit**; if not key **5 (no)**.
- ! If there is any indication that the item was purchased with a **debit card**, such as Barclays Connect or Switch, code 5, not 1.

Qualif

- ! This question is used to identify self-supply items, ie those obtained from a self-employed respondent's own business, and non-business refundable expenditure.

- ! Code 1 should be used where the words "own shop" or "own farm" have been entered against the item to indicate that a shopkeeper or farmer consumed items from his or her own business but did not actually pay out any cash.

- ! Code 2 should be used for items which have been or will be refunded, but for informal rather than business reasons.

Examples include payments for meals, snacks, tea clubs, fares and other expenses by a respondent which are to be refunded by someone who is not an employer and which a self-employed person is not claiming against income tax.

- ! Code 2 should also be used for items which are acquired on account, e.g. monthly accounts, grocery accounts, but where the account itself is not paid during the fortnight.

- ! If in doubt whether the refund is for business or not, contact Field or Research (ext 2395 or 2190).

- ! If neither code 1 or 2 applies, leave the field empty by keying ENTER.

ChildD

! This will be routed only if you are in an adult diary and if you have selected pocket money (14.03.01), school dinner money (03.13.02) or school travel (11.02.10) at **KeyText**. Field interviewers have been instructed to enter the letter "D" in an adult diary if any of these items are being given to a child in the household aged 7-15 who is keeping a diary. If "D" is not entered look at the fact sheet to see if the child is keeping a diary.

If the money is given to a child keeping a diary key 1 (yes) at ChildD; otherwise press ENTER.

Refnd1

- ! These questions cover refunds of **business expenditure**. The FES excludes business expenditure, so this needs to be identified in the diary.

- ! If there is a item entered in the REFUNDS column of the paper diary, check first whether this is non-business, i.e. is it an informal refund which should be entered at **Qualif?** If it should, enter at **Qualif**, delete from the REFUND column on the paper diary and make a note to inform the verifier.

- ! Insurance claims and local authority grants are not business expenses. If these are mentioned, accept the amount at **Paid1** but do not enter at **Refnd1**. Delete these from the refund column of the paper diary if shown there.

- ! If the item seems to be a legitimate business expense, enter the amount refunded at **Refnd1**.

- ! If there is no business expenditure, simply press ENTER.

- ! This field is also used by editors in London if diary items have to be abated because of information in the Household or Income questionnaires.

- ! Detailed instructions for abatements by London editors are covered in section 7.

Shop

- ! This question allows RPI to compare expenditure patterns at major stores with those at smaller outlets.
- ! This question is now routed for most expenditure items but not for take-away meals, meals consumed away from home or services.
- ! Check the name of the shop entered by the respondent. If it is on the shop card list of codes, select the appropriate code number.

5	Aldi
6	Argos
7	Asda
8	B & Q
9	Bainbridge
10	British Home Stores
11	Bonds
12	Boots
13	British Gas (showrooms)
14	Budgens
15	Burton
16	C & A
17	Caleys
18	Cole Brothers
19	Coop
20	David Gregg
21	Debenhams
22	Dixons
23	Dorothy Perkins
24	Farmfoods
25	Food Giant
26	Gateway
27	George Henry Lee
28	Granada
29	Heelas
30	Iceland
31	Jessop
32	John Lewis
33	Knight & Lee
34	KwikSave
35	Leos
36	Littlewoods
37	Lo-cost
38	Marks and Spencer
39	MFI
40	Morrisons
41	Mothercare
42	Netto
43	Normans Superwarehouse
44	Pioneer
45	Peter Jones

46	Presto
47	Robert Sayle
48	Safeway
49	Sainsburys
50	Savacentre
51	Shoprite
52	Somerfield
53	Superdrug
54	Tesco
55	Threshers
56	Trewins
57	Tyrrell & Green
58	Victoria Wine
59	Waitrose
60	WH Smith
61	William Low
62	Woolworths
63	Stewarts (NI only)
64	Wellworth (NI only)
65	Car boot sale

! If the description is local shop, market, milkman, or similar code 2 (no).

! If the respondent has failed to record the point of purchase check where these items are usually bought and code accordingly. If this is unclear, code 2 (no).

AnyMore (and running out of space)

! The Blaise diary allows for 249 separate items, split into 3 blocks of 83 rows. If you key more than 83 items, you will come to a question called **AnyMore** asking whether there are more items to enter. If there are, code 1 and you will reach the next block (where rows are numbered B1-83). If there are more than 166 entries you will come to another AnyMore question which if coded 1 will bring you to block C (rows numbered C1-83).

! If you have more than 249 separate items in the paper diary, you will have no more rows in the Blaise diary. This will not happen often, but if it does, contact your supervisor who will ring London for advice.

=====

AnyInt
AnyWin

! When all expenditure for each day of the paper diary has been keyed Editor 1 will need to key any interest on credit cards or winnings shown on page 38 of the paper diary.

! Check page 38 to see if interest or winnings is recorded. If there are no entries return to **CheckMe** to run range checks.

! If there is an entry on page 38 you will need to jump to the tables for interest and/or winnings on the Blaise questionnaire.

! After keying the final diary purchase press Ctrl-F1. **"Question number?"** will appear at the bottom of the screen. Key 1, then press ENTER twice. This will take the cursor to the question **AnyInt**.

AnyInt

! If any interest on credit card accounts is shown on page 38 of the paper diary, key 1 at **AnyInt**. Use a separate row for each interest payment. If there is no interest page down to **AnyWin** if there are winnings; otherwise save the case by pressing Ctrl+ENTER.

PayInt

! If AnyInt is coded 1 enter the amount of interest at PayInt.

IntCod

! The computer will assign the correct code.

AnyWin

! After completing AnyInt/PayInt PAGE DOWN (PgDn) to AnyWin. If any winnings from betting are shown on page 38 of the paper diary key 1 at AnyWin. Use a separate row for each type of winnings.

PayWin

! If AnyWin is coded 1 enter the amount of winnings at PayWin.

WinTyp

! Enter the following codes at WinTyp:

! 1 if from football pools

! 2 if from bingo

! 3 if from lotteries (except National Lottery)

! 4 if from bookmaker, sweepstakes, other betting.

! 5 if from National Lottery

! 6 if from Irish Lottery (this will be rare and will only apply in a few Northern Ireland cases)

WinCod

! The computer will assign the correct code.

4.5 Running checks

- ! When all diary entries have been keyed, including those on page 38, Editor 1 should return to the serial number screen and run the **CheckMe** checks by re-coding CheckMe to 1(yes) and pressing the END key.
- ! Various checks on monetary ranges or accuracy of expenditure codes may be generated.

Range checks

- ! There are range checks on most monetary values. Although the ranges are fairly broad, checks may come up if an unusually large amount is keyed for an item. Any item less than ,0.10p will also be checked.
- ! The standard wording of the check is
< **Should cost between ,x and ,y** >.
- ! Look at the amounts that have been keyed and check these against the paper diary. Is the amount likely to be correct? For example, did the respondent have a big monthly shop or were goods being purchased for a wedding or party?
- ! If the amount is correct, suppress the check and note on your error sheet that you have done so.
- ! If the amount seems improbable, refer to your supervisor, who should contact Bob Sullivan (ext 2190) or Lynne Rhodes (ext 2395) who may decide to query the amount with the field interviewer.

Expenditure code checks

- ! Certain codes are checked because the main source of data for these is the Household Questionnaire. The codes checked include rent, mortgages, insurances, water charges, council tax, telephone and fuel, vehicles, credit payments and educational courses.
- ! If these are mentioned in the diary it is necessary to flag these so that a London editor can check whether corresponding amounts are recorded in the Household Questionnaire.
- ! The check reads
**< IF KEYTEXT = RESPONSE
Flag entry in paper diary and
check for entry in Household Questionnaire >**
- ! If you encounter this check, note which line of the diary it relates to and the item covered. On the paper diary place an adhesive sticker at the top of the appropriate page to enable a London editor to cross check the entry with the Household Questionnaire.
- ! Then suppress the check.

4.6 *PAB_DONE and Saving diary form*

! When the checks have been run, the PAB_DONE code should be changed to 1, 5, 6 or 7, depending on whether there is expenditure recorded each week.

! Key Ctrl+ENTER to save the form.

! A screen will appear with two options:

```
< Stay in questionnaire >  
< Exit via Admin block >
```

! If you need to stay in the questionnaire to check something, select the first option and you will be taken back to the serial number screen for the case.

! Otherwise select the second option. You will then see the message

```
< End of questionnaire reached  
  Stop interview?  Y/N      >
```

Select Y (yes).

! You will then be taken to the serial number of the next case on the database. Do **not** go into this case unless it is the one you are due to work on next. Usually, you will have to key in the serial number of your next case (the number on screen will be overwritten when you start keying).

! Before starting work on another case write your own authority number and date on the line "CODER" which is half way down on the front of the hard diary cover.

! To return to the main diary menu at this stage press ESC. The main menu will appear: at this you should select Exit.

5. Verification instructions

5.1 Verification: general procedures

- ! Verification must not be carried out by the same editor who did the keying. 10% of all cases must be verified. The criteria for selecting cases for verification are determined by the supervisors and will be changed each month.

- ! There is now one stage of verification. This is a check on the keying of the monetary amounts and involves re-keying all amounts and refunds.

- ! Any discrepancies found when verifying must be resolved with your supervisor.

- ! Any errors made by the first keyer must be noted on an error sheet which will be supplied by your supervisor. The numbers of errors on the sheets should be reported to Research in London at the end of each week.

5.2 Verification of monetary amounts

- ! Editor 2 should call up the case (see section 4.1)
- ! Arrow to the question **PABEd2** and enter your authority number.
- ! At **CheckMe1** code 2 and suppress the error that comes up (SHIFT+F3). The CheckMe checks should have been carried out by editor 1.
- ! **PAB_DONE** should be re-coded 2 (No) until verification is completed.
- ! On the first diary line arrow across to **Paid2**, which should be empty. If it is already filled, refer to supervisor.
- ! Begin re-keying the amount paid for each item in the paper diary in the **Paid2** field.
- ! Also, re-key any amount in the REFUND column on the paper diary in the **Refnd2** field.
- ! Check the paper diary carefully for any notes made by editor 1 which indicate that amounts have been keyed out of sequence or are different to the amount originally recorded.
- ! If the amount you key differs from what was keyed first time, an error message will appear.
- ! Check in the paper diary which is the correct amount, take the cursor to the question shown in the error message which is incorrect (either **Paid1** or **Paid2**, or **Refnd1** or **Refnd2**), press ENTER and then amend the erroneous figure.
- ! Items wrongly keyed by editor 1 should be noted on a separate error sheet.
- ! If an item was completely missed by editor 1, enter the item on the next vacant row under the correct **Day**. You will have to complete all fields for the item including the CAC field and the verification. Make a note of the omission on your error sheet.
- ! On completing the main diary verification, check whether there are entries on page 38 of the paper diary for credit card interest or winnings. If there are entries, jump to the table **AnyInt** (Ctrl+F1, key 1, then ENTER twice) and PageDown to **AnyWin** to ensure details have been recorded. If

5.3 Signing off the case

- ! When verification is completed and all discrepancies resolved return to the serial number screen by pressing HOME.

- ! Change the code at **PAB_DONE** to:
 - 1 if there is expenditure in both weeks of the diary
 - 5 if there is no expenditure in either week
 - 6 if there is no expenditure in week 1
 - 7 if there is no expenditure in week 2.

- ! Save and exit from the case by keying Ctrl+Enter.

- ! On the front of the hard cover of the diary enter your authority number and the date on the line marked "CHECKER".

6. Incomplete information and coding points

This section covers some of the problems you may encounter where information in the paper diary is incomplete or cannot be readily coded to specific codes. Any points not covered here should be raised with your supervisor.

6.1 Food and drink brought home

Items which have the same expenditure code

! If there is one amount covering several items which all have the **same** expenditure code, no action is required, i.e. code the total amount.

Items which have different expenditure codes

! The action taken will depend on the type of expenditure.

! Expenditure code 03.11.11 (food not defined) must **not** be used without the agreement of Research (ext 2190).

! **Grocery accounts**

If a bill for a grocery account is paid during the fortnight and has been itemized on the paper diary, code items separately but delete the total amount (if shown).

If the grocery account is **not paid** during the fortnight any items acquired on such an account should be coded 2 at **Qualif**.

If a non-itemized bill has been paid in the fortnight but the items acquired have not been listed, the case will need to be referred back to the field interviewer.

! **Fruit and vegetables as a single entry**

If fruit and vegetables are given as one total, divide the amount equally between fresh fruit and fresh vegetables.

! **Food and milk tokens**

The **purchase** of a food or milk token should be coded to the appropriate milk or food code. The **use** of a token to buy an item should be **deleted**.

6.2 Regular purchases

Items which have same expenditure code

- ! If there is one amount covering several items which all have the **same** expenditure code, no action is required, i.e. code the total amount.

Items which have different expenditure codes

- ! The following expenditure codes must **not** be used without reference to Research (ext 2190):

07.08.01 Household goods, n.o.s.
09.07.01 Personal goods, n.o.s.

- ! If the respondent has not split costs of toiletries and cosmetics, ring Research (ext 2190) or Field (ext 2395) for advice.

6.3 Take away meals brought home

- ! If the respondent has not ticked whether the meal is hot or cold, code food items as hot and soft drinks as cold unless this is obviously unlikely.

6.4 Meals bought and consumed away from home

Meals bought and consumed at workplace, school

- ! This includes purchases at a workplace the respondent is visiting, ie not his own, and should also include subsidized meals for students.

- ! If "mess bill" is mentioned for someone in HM Forces and food and alcohol have not been separated, allocate 2/3 of the amount to food at workplace and 1/3 to alcohol on licensed premises.

Meals bought and consumed at catering establishment

- ! Alcohol bought with a meal out should have been entered separately in the alcohol section, eg wine with meal. If it is mentioned as being taken with the meal but the amount has not been split allocate 2/3 to the meal out and 1/3 to alcohol on licensed premises, n.o.s.

If it is not clear whether alcohol is included, refer to supervisor for advice.

6.5 Alcohol

- ! Round of drinks at pub should be coded as alcohol at licensed premises, n.o.s. (04.02.07).

6.6 Private Catering

- ! This section covers the codes to be used for catering expenses for weddings, parties, anniversaries, funerals, etc.

Different codes are used for contract catering, catering provided by the household, catering for funerals, etc.

Contract catering

- ! Catering by contractors should be coded 08.05.01 **except** for funerals which should be coded to funeral expenses (08.04.08).

Catering provided by the household

- ! Catering provided by the household should have been itemized (eg separate amounts for bread, cakes, champagne, etc.). If expenditure has not been itemized, the case will need to be referred back to the field interviewer.

Cheese and wine and Christmas parties

- ! If expenditure has not been itemized, the case will need to be referred back to the field interviewer.

Children's parties

- ! If contract catering code 08.05.01; otherwise code 13.01.04.

6.7 Clothing and footwear

- ! If sex, or age of child under 16, is not given and cannot be deduced the case should be referred back to the field interviewer.

6.8 Cash gifts

Cash gift to person in household

- ! Cash gifts to adults - code 14.03.06
- ! Pocket money to children under 16 - code 14.03.01
(NB: this code cannot be used in a child's diary)
- ! Wages for au pairs and domestic help (except child care) - code 08.01.01

Cash gift to person outside household

- ! If a specific item or present is bought it must be coded to the item. If this is not stated, refer to Research.
- ! A cash gift should be coded 14.03.02
- ! A gift voucher (purpose not specified) should also be coded 14.03.02.

Informal cash loans

- ! Cash loans in the lender's diary should be deleted.
- ! A repayment of a cash loan should be coded 14.04.06.

6.9 Expenditure abroad

Definition

- ! Abroad includes the Isle of Man, Channel Islands and the Irish Republic.
- ! Always check page 42 of the paper diary as, if a holiday was taken, the respondent should have noted:
 - the total amount of money taken away
 - the dates and duration of the holiday.

Business trips

- ! Travel and accommodation expenditure should be refunded. If it is not claimed as a refund, refer to Research for a decision.

Package holiday and accommodation costs

- ! Code 13.04.02 for:
 - Package holiday deposit and full payment
 - Accommodation costs for non-package holidays
 - Campsite fees

Timeshares

- ! Timeshare purchase and accommodation costs should be coded 13.04.03.

Duty free purchases

- ! Duty free purchases in the UK should be coded 13.04.05
- ! Duty free purchases abroad should be coded 13.04.04.

Foreign currency or travellers cheques

- ! Any amounts of foreign currency must be converted to , sterling. Ring Lynne Rhodes (ext 2395) for advice.
- ! The currency and cheques should be coded 13.04.04.
- ! Commission on these should be coded 13.04.07.
- ! If commission is not given estimate ,2.50 or 1% of the total amount.
- ! If the holiday starts **after** record-keeping the total value of the foreign currency and travellers cheques (excluding commission) should be **deleted**.

Money spent abroad

- ! Money actually spent abroad, excluding items mentioned above, should be coded 13.04.04.
- ! If a holiday starts **during** diary keeping but ends **after** the fourteenth day of the diary you will need to apportion the money taken abroad according to the number of days spent abroad in the fortnight.

Example:

A person takes ,300 in travellers' cheques, leaves the UK on the 9th day of record-keeping and is away for 7 days.

Assume all the money is spent. So average daily expenditure will be $,300 / 7 = ,42.86$.

As the respondent is away for 6 days of record-keeping (days 9-14) the amount spent during record-keeping will be $6 \times ,42.86 = ,257.16$.

- ! If there is insufficient information to calculate money spent abroad refer to Research.

6.10 Vehicles

Vehicle payments

- ! An outright purchase of a vehicle in the diary should be coded:
 - 10.01.01 for a new car
 - 10.01.02 for a second hand car
 - 10.01.03 for a new or second hand motor cycle

- ! A loan instalment payment for a vehicle should be coded 14.04.04.

- ! A hire purchase down payment or repayment for a vehicle should be coded 14.04.05.

6.11 Mail order payments

Only payments made to the mail order organization should be entered in the diary. If the cash price of an item obtained through mail order has been entered, it should be deleted. If in doubt, refer to your supervisor.

6.12 Any other payments

Items which have same expenditure code

- ! If there is one amount covering several items which all have the **same** expenditure code, no action is required, i.e. code the total amount.

Items which have different expenditure codes

- ! The following expenditure codes must **not** be used without reference to Research (ext 2190):

07.08.01 Household goods, n.o.s.
09.07.01 Personal goods, n.o.s.
14.06.01 Other household expenditure

- ! If there is one amount covering items that have **different** codes, enter items separately and divide the price by the number of items.

6.13 Vouchers

- ! If a voucher used to reduce a bill, all items covered by the voucher should be reduced in proportion to the value of the voucher (assuming that the interviewer or respondent have not already done so). Refer up ambiguous cases.

7. Diary procedures for London editors

This section covers linkage and abatement procedures to be carried out by London editors.

The main tasks to be carried out by London editors involving the diary are:

- ! to resolve any outstanding coding queries
- ! to ensure that household expenditure codes in the diary have equivalent entries in the Household questionnaire
- ! to carry out any abatement of diary items because of answers at the business refunds questions in the Household or Income questionnaires.

Diary assignment

A case, including the relevant diaries, will be assigned to London editors by the senior supervisor.

Outstanding coding queries

Titchfield coders will usually have resolved queries with London before sending the case up. But there may be some points which cannot be sorted out until an editor has gone into the Household or Income questionnaires, eg should a child's travel to school be coded as state or private school travel?

These queries will be noted on the front of the paper diary or, occasionally, on the diary pages. The London editor assigned the case must resolve any queries and, if necessary, amend any erroneous diary code.

Linkage

There are a number of checks in the diary on codes which relate to household expenditure items, such as rent, mortgages, insurances, council tax, fuel payments, vehicle expenditure and credit repayments.

The checks warn that if a payment is made in the diary, a corresponding payment would be expected in the household questionnaire. The checks are activated at Titchfield at the **CheckMe** question and are flagged by a Titchfield coder with a red or blue adhesive sticker.

Where such a payment has been flagged the London editor should go into the Household questionnaire to see whether there is an entry at the relevant question. If the diary entry is described as a first payment it may be assumed that there will not be a Household questionnaire entry. If, however, there is a diary entry but no corresponding household payment, and no satisfactory explanation for the discrepancy, the case must be referred up to the supervisor who will decide whether the case should go to Research.

The most frequent examples of discrepancies between diary entries and corresponding Household questionnaire items are:

Loan, hire purchase and mail order payments in the diary without such payments at QLOANS, QHP or QCLUB.

Methods of payment for telephone, electricity or gas in the diary different from that in the Household questionnaire.

If you cannot resolve the discrepancy, refer to supervisor, **do not guess.**

Abatements

Diary items may be abated because of answers at QREFUNDS in the Household Questionnaire, or at c_EMPJB1.Malinpay or d_Slfjb.SeBusExp in the Income Questionnaire.

The purpose is to abate (reduce or delete) diary expenditure so that

- ! business refunds from an employer are eliminated from the diary
- ! for self-employed people, expenditure which can be claimed as business for tax purposes is eliminated from the diary

The amounts by which you abate will depend on whether this is an employer refund (QREFUNDS in the Household questionnaire), mileage allowance (c_EMPJB1.Malinpay in the Income questionnaire) or self-employed tax claim (d_Slfjb.SeBusExp in the Income questionnaire).

Specific instructions for the amounts by which to abate are given respectively at the instructions for these questions in the Household and Income questionnaire instructions.

From April 1995 abatements are carried out at the **Refnd1** question in the diary.

8. Suggestions and Procedural changes

- ! As you work on the diary you may see gaps in the coding dictionary where additional codes are required. Suggestions for new dictionary entries should be sent to Bob Sullivan at the end of each week.
- ! If advice is required about specific codes your supervisor should discuss with Lynne Rhodes (ext 2395), or, in her absence, Bob Sullivan (ext 2190).
- ! Specific coding decisions of general interest should be E-mailed by Titchfield to all supervisors in London and Titchfield. Any procedural changes will also be notified by Bob Sullivan on a diary decision form.