Social Survey Division

Family Expenditure Survey 1999-2000

DIARY QUESTIONNAIRE

Coding and Editing Notes
and
Instructions to Interviewers

Contents   Colour

FAMILY EXPENDITURE SURVEY

THANK YOU FOR TAKING PART - THESE NOTES ARE A GUIDE TO HELP YOU WITH YOUR DIARY KEEPING UNTIL OUR INTERVIEWER CALLS AGAIN

HOW TO COMPLETE YOUR DIARY

Thank you for agreeing to take part in the Family Expenditure Survey.

The information you give us in your diary is used when the Retail Prices Index is being calculated. We need to know the different patterns of spending in each household in order to monitor what effect changes in the cost of living has on different types of households. It is therefore very important that you provide details of **every item you buy** during the two week diary keeping period.

Write down everything **you personally pay for** during the fourteen days by:

> ⇒ CASH
> ⇒ CHEQUE
> ⇒ POSTAL ORDER
> ⇒ CREDIT CARD
> ⇒ SHOP OR STORE CARD
> ⇒ DEBIT CARD
> ⇒ VOUCHER

If you ask someone else to buy things for you **but you pay** for them, include these purchases in your diary.

REMEMBER TO:

Make your entries as soon as possible after you get home to make sure you do not forget anything.

Enter each item, however small, on a separate line.

After each item enter the amount you spent on it.

PLEASE NOTE:

VOUCHERS OR COUPONS:

If you use a voucher or coupon to save money on your shopping bill, please state **which items** are covered by the voucher or coupon and the **value of the voucher or coupon** (eg 10p off Fairy Liquid).

REWARD CARDS\SAVING STAMPS:

If you use any type of reward card (eg Sainsbury's "Reward", Tesco "Clubcard", BP "Premier") either to make a purchase or as part payment towards the total bill, record how much the total bill came to and how much of this was deducted for the supermarket vouchers/points (ie the value of the vouchers/points you redeemed).

If you use saving stamps, record the total bill and how much of it was paid for with saving stamps.

TILL RECEIPTS:

If you have a till receipt which **clearly** lists the items you have purchased just attach the receipt to the appropriate day in the diary.(There is no need to copy the entries from the till receipt into the diary if the entries are clear and can be easily understood).

If you have a till receipt which **does not clearly** list the items you purchased please try to remember what you bought and

write a description of the item next to the amount shown on the till receipt.

Example till receipt:

SAINSBURY'S
73 HIGH STREET

£

* I/LEATHER SPX4	1.45
* COTTON PADS	1.09
* JS TOILET TSUE	1.69
* DOVE CLEANS SP	0.79
* KITCHEN TOWELS	1.29
* TONIC WATER	0.49
* BANROCK STAT	3.99
* WEETABIX X 24	1.09
* JS GOLDEN SUGAR	1.04
* REDLABLEL COIN	1.19
* ROAST LEGS	1.49
* TAGLIATELLE	1.69
* FRUIT SALAD	2.89
* P/MUSH PASTICCIO	2.19
* LEMONS	0.19
* VITALITE 250G	0.49
* PORK LOIN CHOP	2.03
* MUSHROOM SOUP	0.47

We need the **basic name of the item** as we cannot always identify "own brand" products. For example, "HERO" is the brand name of a dog food but all we need recorded is "dog food" and not just the brand name. Brand names vary in different parts of the country.

Each item you record has to be given a code number before the information can be used. If you just put a total covering a lot of different items or record unusual items without explaining what they are, we may not be able to use the information you have given us.

CREDIT CARDS/CHARGE CARDS:

If you make a purchase using a credit card (eg Access/Visa), a charge card (eg American Express) or a shop or store card (eg Debenhams, Marks and Spencer), enter the item and the amount paid and then ring the letter C printed in the box to the right of where you have entered the amount paid.

DEBIT CARDS:

Do NOT ring the letter C if you purchase an item with a debit card (eg Switch, Delta, Barclays Connect) - just enter the item and the amount paid.

BUSINESS REFUNDS:

We need **all business expenditure and refunds to be recorded** regardless of the amount of the refund or what it is for.

Therefore, if **any item** will be claimed or refunded as a **business expense**, enter the total expenditure at the appropriate place in the diary, the amount to be refunded or claimed in the column headed "REFUNDS" and circle the letter B in the last column. DO NOT MAKE AN ENTRY IN THE REFUND COLUMN UNLESS THE ITEM IS TO BE CLAIMED OR REFUNDED.

ANY OTHER REFUNDS:

If, during the two weeks you are keeping the diary, you buy an item and record it in the diary but you then take the same item back and obtain a refund, please cross out the original entry. Just put a line through both the item and the cost and write across it "refunded".

If you use the refund to buy another item, record details and the **full cost of the new item** on the appropriate page.

PAYMENT BY VOUCHER:

Payment made using gift or refund vouchers should be treated as if you were paying in cash.

BUDGET ACCOUNT OR MAIL ORDER CLUB:

If you make a **regular payment** into a budget account or mail order club write "payment into budget account" (or mail order club) and then the amount you pay. Do not record the goods you obtain from these clubs if you are paying by regular instalments.

If you buy something **outright by mail order** (for example, an offer in a magazine or newspaper or you pay the full cost as a "one-off" payment from a catalogue) please record the total cost and record the goods you bought.

HIRE PURCHASE OR CREDIT SALE:

If you are buying anything on hire purchase or credit sale write down the item and the amount of your payment and state that it is an H.P. payment. If you start buying anything in this way during the two weeks of the diary keeping, note whether your payment is a **deposit or an H.P. payment.**

GIVING MONEY AS A PRESENT:

If you give someone money as a present or as pocket money for them to spend as they choose, please be sure to enter the amount and make it clear whether it was given to **someone within or outside your household**. If the money is for a **specific purpose**

(such as school dinner or travel) **please state the purpose** and **who received the money.**

GIFTS:

If you buy someone a gift (eg for Christmas or a birthday) please state **what the item is. Do not just enter "gift" or "present"** as we cannot use the information unless we know what the item is, how much it cost and where appropriate, what it is made of. For example: china ornament - £7.50.

PLACE OF PURCHASE:

For all food brought home, regular purchases such as newspapers, clothing or any other items you have bought please write, in the box provided, the name of the outlet. For example - ''Corner shop", "Sainsbury's", "Car Boot Sale" etc.

SUPERMARKET PURCHASES:

If you buy items other than food from a supermarket (eg washing up liquid, cosmetics, casserole dish, etc.) and are attaching the till receipt, it is acceptable to include these items under list 1 on the left hand page of the diary.

However, if you purchase an item of **clothing** from a supermarket (ie tights, socks etc) please be sure to **list at question 4** (clothing and footwear) whether the item was for a male or female person and also enter the age if under age 16.

PLEASE REMEMBER TO START A NEW PAGE FOR EACH DAY OF YOUR DIARY

FOOD AND DRINK

We need you to record details of food and drink **brought home** separately from food and drink **bought and consumed elsewhere.**

Therefore please:

Use the LEFT HAND pages to record: **Food and drink BROUGHT HOME** **Take away meals and snacks EATEN AT HOME**

Use the RIGHT HAND pages to record: **Details of meals, snacks, alcohol and non-alcoholic drinks bought and CONSUMED AWAY FROM HOME.**

QUESTIONS 1 and 2 are about items you BRING HOME.

Listed below you will find some examples of how to describe the food and drink brought home.

Meat/poultry:- we need you to record the **type** of meat/poultry (lamb/beef/chicken) and whether it is uncooked or prepared (such as shepherd's pie, chicken pie or luncheon meat) **For fresh (uncooked) meat it is very important to us to know the type of meat/poultry contained in products such as burgers and in mixed packs like barbecue packs.**

If the meat is **cooked or a prepared dish** please state whether it is tinned or hot/cold/ready to eat or whether it is in a pie or pastie.

Fish:- there is no need to state the type of fish but we need you to state whether it is **uncooked, smoked, dried, canned, frozen, etc.** If it is a prepared fish dish state the type of product (eg breaded scampi, cod mornay, fish fingers)

Ready meals:- please record whether they contain **meat, fish or vegetables.**

Pasta:- we need to know whether this is fresh, dried or tinned or a ready meal (see above).

Vegetables:- (tomatoes are included as a vegetable). Please record the type of vegetable and whether fresh, frozen, tinned, dried, bottled etc.
If it is a prepared vegetable dish (eg frozen vegetable lasagne) list what it is.

Potatoes: although a vegetable, potatoes have their own code. Please record whether fresh, frozen, processed, tinned etc. (eg frozen chips).

Fruit:- Please record the type of fruit and whether the fruit is fresh, tinned, bottled, dried or frozen.

Milk:- record whether this is fresh, dried, tinned, baby milk or cream. (If items other than milk are included in your milk bill , please list the name and price of each item).

Alcohol:- please record the **type of alcohol** (ie beer, table wine, sherry, sparkling wine, spirits etc)

Drinks (not containing alcohol):- itemise separately tea, coffee, fruit juice/squash, mineral water and carbonated drinks (ie lemonade).
If the drink was carbonated (fizzy) it is important to mention this.

QUESTION 2

At this question we are collecting information about "Take Away" meals and snacks **EATEN AT HOME.** This covers all hot and cold food bought from a catering establishment and taken home to eat. This will include food delivered to your home such as pizzas or "meals on wheels". Give a brief description of the meal (ie Chinese takeaway) and tick whether it was bought hot or cold.

QUESTION 3

These questions are about food and drink **CONSUMED** <u>**AWAY FROM HOME.**</u>

3(A) At this question we need you to record meals bought at your own:
- Workplace
- Place of study (school, college etc.)

3(B) In section B we need you to record details of all meals, snacks and drinks bought at a:
- Cafe
- Restaurant
- Hotel
- Pub (including pub garden)
- Fish and Chip shop
- Burger bar
- Pizza parlour
  or any other catering establishment (including hospitals, daycare centres and any workplace or place of study which is not your own).

Please state whether you bought a meal or a "snack" or just a drink such as a soft drink or a beer. Please be sure to ring and tick at the appropriate boxes (at B) to indicate whether the meal/snack was **hot or cold** and whether your purchase was consumed **ON** or **OFF** the premises.

If you purchased **any alcohol** please state what type (beer, sparkling wine, sherry, spirits etc) .

ALCOHOL SHOULD BE RECORDED ON A SEPARATE LINE FROM THE MEAL OR SNACK AND THE <u>TYPE</u> OF ALCOHOL AND THE COST INCLUDED.

3(c). In section C we need you to record any food or drink bought from a shop, supermarket or kiosk etc. which is eaten **OFF** the premises but **NOT BROUGHT HOME.**

For example, this could be a sandwich and a drink bought from a kiosk or sandwich bar and eaten at your place of work or maybe an ice cream or some confectionery eaten in the street or a park etc., or taken to someone else's home.

Again, we need you to record whether food was **HOT or COLD** and if alcohol is included , **what type** (ie beer, wine, spirits etc.).

QUESTION 4

Question 4 is for **CLOTHING AND FOOTWEAR** such as jacket, jumper, shoes etc. Please be sure to record whether the described item was for a male or female person and the age (if under 16 years).

QUESTION 5

Question 5 is about **REGULAR PURCHASES** such as newspapers, cigarettes, stamps, stationery, cosmetics and toiletries. If you have already included these in section 1 (either written down or on a till receipt) there is no need to repeat the items here. At this question we also need you to include **ANY OTHER PAYMENTS** and have given a few examples of the type of payments you might incur:

Travel costs and household payments:
- baby goods
- charity donations/subscriptions

- day trips/entertainment/leisure activities
- domestic help/home help/child minder
- hairdressing

- household bills - (but not those paid by direct debit or standing order which will be asked about separately): gas/electricity (including slot meters or card) water rates, window cleaner etc.
- household and leisure goods
- hire purchase instalments
- insurance premiums (state whether: car, life, household contents or structural cover)
- laundry/dry cleaning
- medicines/prescriptions
- petrol, parking, any other motoring expenses
- pocket money
- public transport including season ticket costs
- rent/mortgage (but not if paid by direct debit or standing order)
- telephone (including coin boxes)
- television/video /satellite (subscription or rental)
- video cassettes/tapes/cds.

Entertainment and Social activities:

For example, admission to;
- bingo/cinema/clubs/discos/theatre/museums/exhibitions/stately homes
- (include guide books and programmes)
- football and other sports (record whether as spectator or participant)
- theme parks

"First" payments:

If, during the two week diary-keeping period, you make a "first" payment this should be entered. (The payment will not have been recorded at interview if the first payment is made after the date of the interview). For example, you may make a first payment on a leisure class or study course, or an insurance premium or mail order catalogue.

National Lottery:

Please describe any National Lottery purchase in detail. We need to know whether your ticket is for a **Wednesday or Saturday** draw or for **both** and whether you have bought "**Instants" or "Scratch cards".**

Business trips in the U.K.

Daily expenditure for business trips in **the U.K.** should also be recorded at this section. **Please be sure to record only expenditure in UK and remember to include any refunds relating to business.**

Holidays in the U.K.

Daily expenditure whilst you are on holiday **in the UK only** should be recorded in the diary at this question.
Please note that if you make a payment **in the UK** (to an airline/travel agent etc) in respect of a holiday abroad, the payment should be recorded here.

QUESTION 6
(page 34 of the diary)
Question 6 at the end of the diary relates to the amount of **interest** shown on any credit/charge/shop/store card account **you pay** during the fortnight you are keeping the diary.

QUESTION 7
(page 34 of the diary)
At Question 7 please record any **WINNINGS** (eg horse/dog racing, bingo etc.) you receive from any type of betting, during the diary keeping period. If you win on a National Lottery ticket/card please

make it clear which was the winning ticket/card (ie **Wed or Sat or a scratch card**)

QUESTION 8

(page 35 of the diary)

Question 8 asks you to record information about any holiday you take **outside the UK** during the two weeks you are keeping the diary.

QUESTION 9

SPECIAL CIRCUMSTANCES

Finally, on page 35 of the diary, you are asked to record whether there were any special circumstances in your household (such as visitors staying or someone being away for part of the time or a holiday) during the two weeks of diary keeping. This is to give us an indication of whether your normal pattern of expenditure may have been affected by these circumstances.

EXAMPLE PAGES ARE INCLUDED AT THE BEGINNING OF YOUR DIARY FOR EASY REFERENCE

PLEASE REFER TO THE EXAMPLE PAGES TO SEE HOW TO RECORD YOUR DAILY EXPENDITURE

FAMILY EXPENDITURE SURVEY

DIARY QUESTIONNAIRE

April 1999 - March 2000

TABLE : DIARY

10.5   QIntro.**PAB_DONE**
APPLIES TO ALL
Has coding been completed, verification done if required, and interest from credit cards and winnings keyed?

Yes	1
No	2
Nil expenditure both weeks	5
Nil expenditure Week 1 only	6
Nil expenditure Week 2 only	7

TABLE : EXPEND

20.1   Marker variable : (**CHILDMKR**)

Adult	a
Child	c

20.5   QItems.Expend.ItemNum (**EXPEND_ItemNum**)
APPLIES TO ALL
Item (row) number
        1..400

20.10   QItems.QExpend1.**Day** (*)
APPLIES TO ALL UNLESS PAB_DONE CODED 5
If entry for a day in diary, key the day number.
        1..14

20.15   QItems.QExpend1. .ExpDesc (**EXPEND_KEYTEXT0**)
APPLIES IF DAY = 1-14
Key text as necessary

TABLE: EXPEND

20.20   QItems.QExpend1 .Fincode (**EXPEND_KEYTEXT1**)
APPLIES IF KEYTEXT0 (eXPdESC) = RESPONSE
Computer-assisted code field
(codes entered from dictionary of expenditure items, matching text keyed at 20.15)

These codes are now delivered without the dots as 6 digit fields, e.g. '010101'

Code	Description
.01.01.01	Rent
.01.01.02	Mortgage instalment payment
.01.01.03	Mortgage endowment policy
.01.01.04	Mortgage protection policy
.01.01.05	Council tax (GB), Rates (NI)
.01.01.06	Water rates
.01.01.07	Service charges
.01.01.08	Structural insurance
.01.01.09	Contents insurance
.01.01.10	Ground rent
.01.02.01	Outright purchase of/deposit on main dwelling
.01.02.02	Caravan and mobile home purchase/decoration
.01.03.01	Central heating installation (by contractor)
.01.03.02	Central heating maintenance (by contractor)
.01.03.03	Capital improvements (by contractor)
.01.03.04	Repairs, decorations, replacements (by contractor)
.01.04.01	Central heating installation
.01.04.02	Materials for major/ external DIY home improvements
.01.05.01	Doors, baths, electrical and other fittings
.01.05.02	Tools
.01.05.03	Paint, wallpaper, timber
.01.05.04	Maintenance: equipment hire, small materials
.01.06.01	Purchase of second dwelling
.01.06.02	Second dwelling: rent
.01.06.03	Second dwelling: council tax, water, mortgage, insurance
.01.06.04	Second dwelling: electricity account payments
.01.06.05	Second dwelling: gas account payments
.01.06.06	Second dwelling: telephone account payments
.01.06.07	Second dwelling: TV licences
.02.01.01	Gas account payment
.02.01.02	Gas board budgeting payment
.02.01.03	Gas slot meter payment
.02.02.01	Electricity account payment
.02.02.02	Electricity board budgeting payment
.02.02.03	Electricity slot meter payment

TABLE: EXPEND

EXPEND_KEYTEXT1 (cont)

.02.03.01	Coal and coke
.02.03.02	Central heating oil
.02.03.03	Calor gas,paraffin,wood
.02.03.04	Bottled gas
.03.01.01	bread
.03.01.02	biscuits
.03.01.03	cakes, pastries, fruit pies and puddings
.03.01.04	pastry, mixes for cakes, puddings, pastry etc
.03.01.05	breakfast cereals
.03.01.06	flour, rice and other cereals
.03.01.07	pasta - dried or fresh
.03.01.08	pasta - cooked (not ready meals)
.03.01.09	Kit-kats
.03.02.01	fresh milk
.03.02.02	other milk and cream
.03.02.03	yoghurt and milk based desserts
.03.02.04	cheese
.03.03.01	eggs
.03.04.01	butter
.03.04.02	margarine
.03.04.03	cooking oils and fats
.03.05.01	beef and veal (uncooked)
.03.05.02	lamb (uncooked)
.03.05.03	pork (uncooked)
.03.05.04	ham and bacon (uncooked)
.03.05.05	sausages (uncooked)
.03.05.06	poultry (uncooked)
.03.05.07	offal and other uncooked meat
.03.05.08	tinned and bottled meat and meat products
.03.05.09	cold, ready-to-eat meats and meat products
.03.05.10	meat and poultry pies and pasties
.03.05.11	meat dishes ready prepared
.03.05.12	meat type not specified (uncooked)
.03.06.01	fish (uncooked) and shellfish
.03.06.02	processed fish (smoked,dried,canned,bottled)
.03.06.03	fish (prepared) and fish products
.03.06.04	fish dishes ready prepared
.03.07.01	potatoes (raw)
.03.07.02	processed potatoes and products (not snacks)
.03.07.03	fresh vegetables and salad
.03.07.04	processed and frozen vegetables
.03.07.05	pulses, dried and processed
.03.07.06	vegetable dishes ready prepared

EXPEND_KEYTEXT1 (cont)

.03.08.01	fresh fruit
.03.08.02	processed fruit (excl. dried)
.03.08.03	dried fruit and nuts
.03.09.01	sugar
.03.09.02	jams, jellies, preserves
.03.09.03	sweets and chocolates
.03.10.01	tea
.03.10.02	coffee
.03.10.03	food drinks
.03.10.04	fruit juice,drinks and squash (not carbonated)
.03.10.05	carbonated drinks
.03.10.06	mineral water (still and sparkling)
.03.11.01	ice cream and sorbets
.03.11.02	crisps and savoury snacks
.03.11.03	pickles, sauces, flavourings, herbs
.03.11.04	soup
.03.11.05	savoury quiches, flans, pizzas, pancakes, pies
.03.11.06	vegetable protein,vegetarian rissoles,mixes
.03.11.07	other convenience foods n.o.s.
.03.11.08	diet foods,
.03.11.09	baby foods (not milk)
.03.11.10	payment for food - items not specified
.03.11.12	sandwiches, filled rolls and baguettes
.03.12.01	Hot take-away meals eaten at home
.03.12.02	Cold take-away meals eaten at home
.03.13.01	Meals bought and eaten at workplace
.03.13.02	State school meals
.03.14.01	Hot food eaten on premises
.03.14.02	Cold food eaten on premises
.03.14.03	Hot food eaten off premises
.03.14.04	Cold food eaten off premises
.03.14.05	Confectionery eaten off the premises
.03.14.06	Ice cream eaten off the premises
.03.14.07	Soft drinks drunk off the premises
.03.15.01	Hot food other outlets
.03.15.02	Cold food other outlets
.03.15.03	Confectionery other outlets
.03.15.04	Ice cream other outlets
.03.15.05	Soft drinks other outlets

EXPEND_KEYTEXT1 (cont)

.03.16.01	school dinner (child)
.03.16.02	hot meal/snack away from home (child)
.03.16.03	cold meal/snack away from home (child)
.03.16.04	confectionery away from home (child)
.03.16.05	ice cream away from home (child)
.03.16.06	soft drinks away from home (child)

(2 codes below from 1st July 1998)

.03.16.07	hot takeaway meals eaten at home
.03.16.08	cold takeaway meals eaten at home
.03.17.01	food stamps
.04.01.01	beer and lager
.04.01.02	cider
.04.01.03	table wines (and wine n.o.s)
.04.01.04	champagne and sparkling wines
.04.01.05	fortified wines
.04.01.06	spirits, liqueurs
.04.01.07	alcoholic soft drinks
.04.01.08	alcohol from off-licence, n.o.s.
.04.02.01	beer and lager
.04.02.02	cider
.04.02.03	table wines (and wine n.o.s)
.04.02.04	champagne and sparkling wines
.04.02.05	fortified wines
.04.02.06	spirits, liqueurs
.04.02.07	alcoholic soft drinks
.04.02.08	alcohol at licensed premises, n.o.s.
.05.01.01	Cigarettes
.05.01.02	Pipe tobacco and tobacco n.o.s.
.05.01.03	Cigars
.06.01.01	Men's outerwear
.06.01.02	Women's outerwear
.06.01.03	Boys' outerwear (aged 5-15)
.06.01.04	Girls' outerwear (aged 5-15)
.06.01.05	Infants' outerwear (under 5)
.06.02.01	Men's underwear
.06.02.02	Women's underwear
.06.02.03	Children's and infants' underwear (under 16)
.06.03.01	Men's accessories
.06.03.02	Women's accessories
.06.03.03	Children's/infants' accessories (under 16)
.06.04.01	Men's footwear
.06.04.02	Women's footwear
.06.04.03	Children's and infants' footwear (under 16)
.06.04.04	Footwear n.o.s.

EXPEND_KEYTEXT1 (cont)

.07.02.07	Gas cookers
.07.02.08	Other gas appliances
.07.02.09	Electric consumables
.07.02.11	Gas and electric appliances: spare parts
.07.02.12	Repairs and insurance for electrical appliances
.07.02.13	Repairs and insurance for gas appliances
.07.03.01	Kitchen utensils and equipment
.07.03.02	Kitchen disposables
.07.03.03	China, glass, pottery, cutlery
.07.03.04	Fancy / decorative goods
.07.03.05	Other household hardware and appliances
.07.03.06	Matches
.07.04.01	Detergents, washing-up liquid, washing powder
.07.04.02	Disinfectants, polishes, other cleaning materials
.07.05.01	Toilet paper
.07.06.01	Pet food
.07.06.02	Pet purchase, accessories, vets' fees
.07.07.01	Garden equipment (not furniture)
.07.07.02	Garden tools and accessories
.07.07.03	Plants, flowers, seeds, fertilizers, insecticides
.07.07.04	Garden furniture
.07.08.01	Household goods, n.o.s.
.08.01.01	Domestic help
.08.01.02	Child care payments
.08.01.03	Nursery, creche, playschools
.08.01.04	Cleaning and dyeing
.08.01.05	Laundry, laundrette
.08.01.06	Repairs to footwear
.08.01.07	Repairs to personal goods
.08.02.01	Postage and poundage
.08.02.02	Telephone purchase
.08.02.03	Telephone account
.08.02.04	Telephone coin and other payments
.08.02.06	Mobile phone account payments
.08.02.07	Answering machines, fax machines, modems
.08.02.08	**Mobile phones – other payments**

.08.03.01	Trade union and professional organisations
.08.03.02	Subscriptions: leisure activities
.08.03.03	Subscriptions: sports and social clubs
.08.03.04	Other subscriptions
.08.04.01	Bank and post office counter charges
.08.04.02	Bank service charges
.08.04.03	Stamp duty, certificates and licences
.08.04.04	House moving expenses: conveyancing, est agents, etc.
.08.04.05	Legal fees paid to banks
.08.04.06	Legal fees paid to solicitors
.08.04.07	Other professional fees inc. court fines
.08.04.08	Funeral expenses
.08.05.01	Contract catering
.08.05.02	Rental/hire of electrical/household equipment
.09.01.01	Toilet soap
.09.01.02	Toiletries (disposable)
.09.01.03	Toilet requisites (durable)
.09.01.04	Hair products
.09.01.05	Cosmetics and related accessories
.09.02.01	Jewellery, watches and other personal effects
.09.02.02	Leather and travel goods
.09.03.01	Baby toiletries and accessories (disposable)
.09.03.02	Baby equipment (exclude prams and pushchairs)
.09.03.03	Prams, pushchairs, pram accessories
.09.04.01	NHS prescription charges and payments
.09.04.02	Medicines and medical goods - not NHS
.09.04.03	NHS medical, dental and optical fees
.09.04.04	Private medical, dental and optical fees
.09.05.01	Purchase of spectacles, lenses, prescription sunglasses
.09.05.02	Accessories/repairs to specs/lenses
.09.06.01	Hairdressing,beauty treatments,wigs etc
.09.07.01	Personal goods, n.o.s.

EXPEND_KEYTEXT1 (cont)

.10.01.01	New car or van outright purchase
.10.01.02	Second hand car outright purchase
.10.01.03	Car leasing payments
.10.01.04	New/second hand motorcycle purchase
.10.01.05	New car/van:loan or hp (H/hold qre)
.10.01.06	Second hand car/van:loan/hp (H/hold qre)
.10.01.07	New/second hand motorcycle:loan/hp (H/hold qre)
.10.02.01	Car or van repairs and servicing
.10.02.02	Car or van spare parts
.10.02.03	Car or van accessories and fittings
.10.02.04	Motor cycle repairs and service
.10.02.05	Motor cycle accessories/spares
.10.03.01	Petrol
.10.03.02	Diesel oil
.10.03.03	Other motor oils
.10.04.01	Vehicle insurance
.10.04.02	Vehicle tax
.10.04.03	AA and RAC subscriptions
.10.04.04	Driving lessons
.10.04.05	Anti-freeze,battery water,cleaning materials
.10.04.06	Parking fees, tolls and permits
.10.04.07	Car tools, other motoring costs
.10.04.08	Motoring fines and penalties
.11.01.01	Purchase of boats, wheelchairs, trailers
.11.01.02	Accessories, repairs to boats, wheelchairs
.11.01.03	Bicycle purchase
.11.01.04	Bicycle accessories, repairs, other costs
.11.02.01	Railway and tube season tickets
.11.02.02	Railway and tube fares, not season tickets
.11.02.03	Bus and coach season tickets
.11.02.04	Bus and coach fares, not season tickets
.11.02.05	Combined fare season tickets
.11.02.06	Combined fares, not season tickets
.11.02.07	Air fares (within UK)
.11.02.08	Air fares (International)
.11.02.09	Water travel, not season tickets
.11.02.10	School travel
.11.02.11	Water travel season tickets
.11.03.01	Taxis and hired cars with drivers
.11.03.02	Hire of self-drive cars
.11.03.03	Other personal travel

TABLE: EXPEND

EXPEND_KEYTEXT1(cont)

.12.01.01	Television sets
.12.01.02	Satellite dish purchase
.12.01.03	Satellite dish installation
.12.01.04	Video recorders
.12.01.05	Audio equipment, CD players
.12.01.06	Personal computers, printers and calculators
.12.01.07	Musical instruments
.12.01.08	Records,CDs,cassettes,discs, (inc. rental)
.12.01.09	Accessories for audio equipment
.12.01.10	Blank, pre-recorded video cassettes (inc. rental)
.12.01.11	Repairs, insurance of TV, video, audio, computers
.12.01.12	Computer software and games cartridges
.12.01.13	Console computer games
.12.01.14	Spare parts for TV, video, audio, computers
.12.01.15	Purchase of digital TV decoders
.12.02.01	Sports,camping and outdoor goods and equipment
.12.03.01	Newspapers
.12.03.02	Magazines and periodicals
.12.03.03	Books
.12.03.04	Personal stationery
.12.04.01	Toys, hobbies, games
.12.04.02	Photographic/optical equipment
.13.01.01	Cinemas
.13.01.02	Live entertainment: theatre, concerts, shows
.13.01.03	Admissions to clubs, dances, discos, bingo
.13.01.04	Social events and gatherings
.13.01.05	Participant sports, excluding subscriptions
.13.01.06	Spectator sports - admission charges
.13.02.01	TV licences
.13.02.02	TV rental, slot meter payments
.13.02.03	TV/video/satellite rental hardware
.13.02.04	Satellite TV subscription to channels
.13.02.05	Cable TV connection
.13.02.06	Cable TV subscription
.13.02.07	**Internet subscription fees**
.13.03.01	Fees/maintenance: educational courses
.13.03.02	Fees/maintenance: non-household member
.13.03.03	Fees for leisure classes
.13.03.04	Ad hoc school expenditure
.13.04.01	Holidays in UK (accommodation)
.13.04.02	Holidays abroad (accommodation)

.13.04.03	Timeshares/holiday homes overseas
.13.04.04	Money spent abroad
.13.04.05	Duty free goods bought in UK
.13.04.06	Non-package travel ins./holiday money-friend
.13.04.07	Commission travellers cheques/currency
.13.05.01	Football pools stakes
.13.05.02	Bingo stakes, excluding admission
.13.05.03	Lottery (not National/Irish Lottery)stakes
.13.05.04	Bookmaker, tote, other betting stakes
.13.05.06	Irish Lottery stakes
.13.05.07	National Lottery instants/scratchcards
.13.05.08	National Lottery stakes - Saturday draw
.13.05.09	National Lottery stakes - Wednesday draw
.13.05.10	National Lottery stakes - both draws
.14.01.01	Savings, investments (exc AVCs)
.14.01.02	Private personal pension
.14.01.03	Additional Voluntary Contributions
.14.01.04	Money set aside for payment of bills
.14.01.05	Superannuation deduct. subsid employee job
.14.01.06	Widow's/dependant's/orphan's fund
.14.02.01	Life, death, non-house endowment
.14.02.02	Private medical insurance
.14.02.03	Accident, sickness, redundancy, other insurance
.14.03.02	Cash gifts to those outside household
.14.03.03	Charitable donations and subscriptions
.14.03.04	Money sent abroad
.14.03.05	Maintenance or separation allowance
.14.03.06	Money to other spenders/other H/hold items
.14.03.07	Residential care for blind, sick, elderly
.14.03.08	Pocket money to children
.14.03.09	Money given to children for specific purposes
.14.03.10	Cash gifts to children
.14.04.01	Credit/charge/store card account payment
.14.04.02	Credit/charge/store card interest payment
.14.04.03	Credit card etc annual standing charge payment
.14.04.04	Loan instalment payment
.14.04.05	Hire purchase instalment payment
.14.04.06	Club instalment payment
.14.04.07	Pay off loan to clear other debt (H/hold qre)
.14.05.01	Income tax payment
.14.05.02	National Insurance contribution
.14.06.01	Household items and bills, n.o.s.,overdrafts

TABLE : EXPEND

20.25   QItems.QExpend1.**Paid1** (*)
APPLIES IF DAY = 1-14
What is total amount paid?
ENTER PENCE
      1..99999997

20.30   QItems.QExpend1.**Credit** (*)
APPLIES IF ADULT DIARY AND DAY = 1-14
Was the item bought with a credit, charge, shop or store card?
      Yes 1
      No 2

20.35   QItems.QExpend1.**Qualif** (*)
APPLIES IF ADULT DIARY AND DAY = 1-14
Key qualifier code
      Own shop/farm 1
      Non-business expense 2
      Blank if Qualifier Code does not apply.

20.36   QItems.QExpend1.**ToWhom** (*)
APPLIES IF ADULT DIARY AND DAY 1-14 AND CODE = 14.03.08 OR 14.03.09
OR 14.03.10
Enter person number of child to whom money was given
      1..14

(Code applies if pocket money or cash given to a child in the household.)

20.40   QItems.QExpend1.**ChildD** (*)
APPLIES IF ADULT DIARY AND DAY = 1-14
AND (KEYTEXT.CODE = 03.13.02 OR 11.02.10 OR 14.03.08 or 14.03.09 or
14.03.10)
Code 1 if this item is for a child keeping a diary
DO NOT CODE IF DIRECT PAYMENT BY PARENT OF DINNER MONEY TO
SCHOOL OR OF BUS/RAIL FARE TO BUS/RAIL COMPANY
      Yes 1
      Blank if question does not apply.

(Code applies if school dinner money, school travel money or pocket money/ cash is
entered in an adult diary and is given to a child in the household who is also keeping a
diary)

TABLE: EXPEND

20.45   QItems.QExpend1.**Refnd1** (*)
APPLIES IF ADULT DIARY AND DAY = 1-14
Key amount refunded or claimed for business, or to be abated (from Household/Income questionnaires)
ENTER PENCE. IF NONE, PRESS ENTER
      1..999997
      Blank if no refund for businesss.

20.50   QItems.QExpend1.**NtAmt1** (*)
APPLIES IF ADULT DIARY AND DAY = 1-14
Net amount paid
      0..99999997
      (calculated field: **Paid1** - **Refnd1**)

20.55   QItems.QExpend1.**Shop** (*)
APPLIES IF ADULT DIARY AND DAY = 1-14
AND KEYTEXT.CODE IS IN THE FOLLOWING RANGES: ((KeyText .code >'.01.04') AND (KeyText.code <'.01.06'))
OR ((KeyText.code >'.02.03') AND (KeyText.code <'.02.04'))
OR ((KeyText.code >'.03.01') AND (KeyText.code <'.03.12'))
OR ((KeyText.code >'.04.01') AND (KeyText.code <'.04.02'))
OR ((KeyText.code >'.05.01') AND (KeyText.code <'.08.01'))
OR ((KeyText.code = '08.02.08'
OR ((KeyText.code >'.09.01') AND (KeyText.code <'.10.01'))
OR ((KeyText.code >'.10.02.01') AND (KeyText.code <'.10.04'))
OR (KeyText.code ='.10.04.05')
OR ((KeyText.code >'.11.01') AND (KeyText.code <'.11.02'))
OR ((KeyText code > '12.01') AND (KeyText.code <'12.1.16'
OR ((KeyText.code >'. 12.02) AND (KeyText.code <'.13.01'))
OR ((KeyText.code >'.13.05.04') AND (KeyText.code <'.13.06'))

Was the item bought at one of the shops on the SHOP CARD ?
     IF YES, code which one
     IF NO, code 1

code	Shop Desciption
1	Not on Shop Card List

2	Local Corner Shop
5	Aldi
6	Alldays
7	Allsports
8	Argos
9	Asda (include Dales)
10	B&Q
11	Boots
12	British Gas
13	British Home Store
14	Budgens
15	Burton (Top Man,Principles,Top Shop,Evans,Dorothy Perkins,Debenhams)
16	C&A
17	Car Boot Sale
18	Charity Shop
19	CJ Clark Ltd (Clarks, Ravel, K Shoes, Crockets, Rohan)
20	Comet
21	Coop (Leo, Homeworld, Market Fresh, Stop & Shop,Pioneer,Living)
22	Crazy Prices (NI only)
23	Curleys (NI only)
24	David Grieg
25	Disney Store
26	Dixons (PC World, Currys,The Link)
27	Do-it-All
28	Dolland & Aitchison
29	Dunnes Stores(NI only)
30	Early Learning Centre
31	Energy Centre
32	Etams
33	Farmfoods
34	Game (computer games shop)
35	Granada
36	H. Samuel (Jewellers)

37	Halfords
38	Hamleys
39	Heelas
40	Homebase
41	House of Frasers (Army & Navy,Barkers,Binns,Cavendish House,David Evans, DH Evans, Dickins & Jones, Dingles, Frasers, Hammonds, Howells, Jollys, Kendals, Rackhams)
42	Iceland
43	IKEA
44	Index Catalogue Shop
45	JJB Sports
46	John Lewis Group (John Lewis, Cole Bros,Bonds,Bainbridge,Trewins,Jessop & Sons,Robert Sayle,Peter Jones, Knight & Lee, Tyrell & Green)
47	John Menzies
48	Jumble Sale
49	Kwik Save
50	Lillywhites
51	Littlewoods
52	Lo-cost
53	Marks & Spencer
54	MFI
55	Morrisons
56	Mothercare
57	Multisports
58	Netto
59	Next
60	Norweb
61	Oddbins
62	Powerhouse
63	Safeway and Presto
64	Sainsburys
65	Savacentre
66	Scotpower

67	Sears Plc (Shoe city,Shoe Express,Dolcis, Roland, Cartier, Hush Puppies,Cable & Co, Warehouse, Richards, Wallis, Miss Selfridge, Adams, Pride & Joy, Selfridges, Freemans)
68	Seeboard
69	Shoprite
70	Somerfield, Gateway, Food Giant
71	Spar
72	Specsavers
73	Stewarts (NI only)
74	Superdrug
75	Supervalu (NI only)
76	Tesco
77	Texas
78	Thorn EMI (Radio Rentals,HMV,Dillons)
79	Toys R Us
80	Victoria Wine and Threshers
81	Vision Express
82	Waitrose
83	Wellworth (NI only)
84	Westside Stores (NI only)
85	WHSmith (Our Price)
86	Wickes
87	Wilkinson
88	Woolworth

20.5 - 20.55 repeated for up to 399 further rows.

TABLE : INTCRED

The table contains the following questions for up to 5 entries:

30.5   Index variable: (**INTCRED_Itemnum**)
           1..5

30.10   QTCredit.QShop.**AnyInt** (*)
         APPLIES IF DAY = 1-14 AND ADULT DIARY
         Code 1 if box 1 on page 38 has been completed for interest on credit cards, etc
           Yes...1
         Blank if question does not apply

30.15   QTCredit.QShop.**PayInt** (*)
         APPLIES IF AnyInt= 1
         What is the amount of interest paid on this row?
         DO ONE ROW AT A TIME. ENTER PENCE
           1..999997;

30.20   QTCredit.QShop.**IntCod** (*)
         APPLIES IF AnyInt = 1
         CODE 14.04.02 is entered.

TABLE : WINNINGS

The table contains the following questions, for up to 6 entries:

40.5
Index variable : (**WINNINGS_ITEMNUM**)
1..6

40.10
QTWin.Win.**AnyWin** (*)
APPLIES IF DAY = 1-14 AND ADULT DIARY
Code 1 if box has been completed for winnings
Yes.. 1
Blank if question does not apply

40.15
QTWin.Win.**PayWin** (*)
APPLIES IF AnyWin = 1
What is the amount of winnings on this row?
DO ONE ROW AT A TIME.   ENTER PENCE
1..99999997

40.20
QTWin.Win.**WinTyp** (*)
APPLIES IF AnyWin = 1
Enter winnings code
National Lottery Saturday draw 1
National Lottery Wednesday draw.. 2
National Lottery both draws.. 3
National Lottery Instants/scratchcards 4
Irish Lottery... 5
Lotteries, except National/Irish 6
Football pools.. 7
Bingo... 8
Bookmaker, other betting.. 9

40.25
QTWin.Win.**WinCod** (*)
APPLIES IF AnyWin = 1
IF WinTyp = 1 WinCod = 130608
IF WinTyp = 2 WinCod = 130609
IF WinTyp = 3 WinCod = 130610
IF WinTyp = 4 WinCod = 130607
IF WinTyp = 5 WinCod = 130606
IF WinTyp = 6 WinCod = 130603
IF WinTyp = 7 WinCod = 130601
IF WinTyp = 8 WinCod = 130602
IF WinTyp = 9 WinCod = 130604

INSTRUCTIONS FOR ADULT DIARIES

1. Placing the Diary

- All adult spenders in a household are required to keep a diary.

- The Diary should be started immediately after the interview. If this is not possible, it should be started 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.

- Take each spender through the diary guide booklet to ensure instructions are fully understood.

- Leave at least one copy of the diary guide booklet with each household for easy reference.

- Please assist with any difficulties and make additional calls if necessary.

- A spender who is incapable of completing the diary entries (for example: a blind person or someone unable to write) should be included as a spender. If their expenditure record is kept by someone else on their behalf, check the accuracy by going through the details with the spender . Alternatively, you may enter their expenditure details yourself.

- Please draw the attention of respondents to the examples at the beginning of the diary and the references to the relevant pages in the guide.

2. What the Diary covers

2.1 The diary covers all amounts of money spent du ring the two weeks; this may include some items covered in the household schedule, e.g. insurance payments and gas or electricity bills.

2.2 Each item of expenditure should be listed separately, with its price.

3   General points for completing the Diary

3.1   Each item should be entered on a separate line and individually priced. The type of items that need to be identified are described in the diary guide booklet. Your coding frame booklet will explain the level of detail required.

It is always better to have too much rather than too little detail.

3.2   When recording amounts:
-        do not write in £ and p signs
-        enter 00 in the pence column where amounts are given in £s only
-        ensure that all entries are within the columns

3.3   Till receipts may be used for supermarket purchases if:
-        each item is clearly identified in sufficient detail for coding
-        the price of each item is given
-        the receipt identifies if goods were obtained with a credit card.

If all of this information is shown, stapl e the receipt to the appropriate page.
It is not necessary for the items to be transcribed from the till receipt into the diary if the entries are clear. If clarification is necessary and an item is re-written into the diary, please ensure it is deleted from the till receipt to avoid "double counting" at the coding stage.

Till receipts with inadequate detail will be referred back to you.

3.4   Clarify all ambiguous or incomplete descriptions

3.5   **Grocery accounts**
If a grocery account will be paid during the fortnight, ask the informant to try to list each item and price <u>separately</u>.

If the respondent can itemise
S/he should list each item purchased on the account separately on the day the bill is paid. (This may be a whole month's groceries.)

If the respondent cannot itemise
S/he should note down on each day any items obtained on this account. Where possible they should anticipate the cost and enter the amount to be paid for the purchase to the left of the £ p column, and note that goods are "on account". On the

day that 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.

3.8   **Shopkeepers and farmers**
        If shopkeepers and farmers consume goods which they would normally sell commercially, these goods must be entered.

        Informant pays for the goods
        Record the amount paid.

        Informant does not put money in the till
        Enter the price s/he would have sold the goods for. (For farmers, this may be a n approximation.) The words "own shop" or "own farm" should be entered beside the item, to indicate that no cash was actually paid out.

3.10   **Items bought on credit or charge cards etc.**
        Any item acquired but not yet paid for by credit card, charge card, s hop card or store card should be recorded with its price and the letter "C" should be ringed in the 'Credit' column.. **Any interest on these cards should be recorded at question 6B of the diary. Any annual standing charge shown on the account should be excluded.**

        Code "C" should <u>not</u> be ringed if the items were acquired with a bankers cheque card or debit card (e.g. Switch or Connect). These are similar to cash transactions because the bank account is automatically debited.

        Often the Credit column is ringed in the diary, even though it is indicated in the Household Schedule that the informants do not have a credit card. Please also check that if there is an entry showing interest on a credit card, there should be a credit card payment entered during the diary keeping period.

        •   **Direct Debit**

        Direct Debit payments **should not** be entered in the diary as they form part of the Household Questionnaire.

3.11   **Business refunds**
        Where a full or partial refund is being claimed against an item listed in the diary, the amount to be refunded should be recorded in the refunds column of the diary and the letter "B" ringed in the final column. The amount paid should <u>not</u> be adjusted to allow for the refund.

Probe to check whether any employer refunds mentioned in the Hous ehold Questionnaire or items to be set against tax by the self-employed should be coded as refunds in the diary.

3.12   **Shop name**

The name (or type) of the shop or store where a purchase is made must be recorded for all shop-bought items except take-away food and food/ meals consumed away from home.

For purchases at small corner shops or market stalls, the term "local shop" or "stall" is sufficient. Purchases at car boot sales should be listed as "car boot". Multiples should be identified by name.   The name of outlet is not required for services such as payment of a gas bill, leisure classes etc. where there is no purchase as such.

4.   Layout of the diary

Refer to the diary guide booklet and example pages in the diary.

10. Regular purchases and any other payments:

Please check the required amount of detail is included for the following:

- **Motoring expenses**
  State type of vehicle.
  Itemise separately petrol, diesel, engine oil, parking fees, spare parts; servicing; subscriptions to motoring organisations.

- **Travel costs**
  State type of transport and type of fare
  (e.g. bus or rail fare; one day travelcard; season tickets for train.)

- **Household goods**
  For items such as cookers, fires, refrigerators and water heaters, state whether payments are deposits, instalments or full payments.
  State 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, e.g. holiday home, or accommodation to which all or part of the household will be moving, i.e. 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**
  Ensure payments are itemised (ie gardeners, window cleaners, baby sitters etc),

- **Gifts and presents**
  If a gift/present is not cash ensure the item purchased is specified.

- **Pocket money**
  There is no need to record exchange of **cash** between adult spenders in the household, but pocket money to children should be entered with the child's person number (and a 'd' written beside the amount if the child is keeping a diary).

- **Betting, bingo, etc.**
  All betting stakes, race cards, bingo charges etc.to be included.
  Admission charges for bingo, horse and greyhound race meetings etc. to be shown separately.

- **National Lottery**
  Check scratchcard payments are listed separately from entry to the two weekly draws and the day of the draw is recorded.

- Entries in the diary should show the money spent on scratchcards or draws. Do NOT subtract winnings and show the net amount spent: this is a particular problem with scratchcards.

- **Winnings**
  Any winnings should be entered at Q.7 of the diary.

- **Clubs**
  This is a difficult area. Vague answers will cause problems for coders.
  Ensure what the payment covers is specified(e.g. is 'golf club' a payment for membership,   green fees, a five iron etc?)

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

- **Household bills**
  Any household bills paid during the fortnight should be entered,. This may include items covered in the Household Questionnaire.
  Amounts set aside to pay future bills should be noted as 'set aside'.

- **Slot meter payments**
  Check whether for gas, electricity, etc. has been entered.

- **Insurance payments**
  "Insurance" is not an acceptable description, the type of insurance must be stated (e.g. Life, Endowment, Contents). Please state if the diary entry is the first payment.

- **Deposits**
  What the deposit was for and whether it was towards a **cash** purchase or a **credit** acquisition should be indicated.

- **Instalments on credit agreement, mail order and insurance premiums**
  If any payments entered in the record book 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".

- ## Holiday expenditure

  For all holiday expenditure, check **where** the holiday will be taken has been entered.

  Advance holiday payments
  All expenditure in preparation for the holiday, should be recorded if it occurs during the 14 days. (e.g. deposit or final payment; purchase of travellers cheques or currency)

  Bank charges for travellers cheques or foreign currency should be shown separately.

- **Holidays starting AND ending during record keeping**

  If in the UK:
  Respondents should be asked to keep diaries as if they were at home, i.e. itemise all expenditure.

  If holiday is abroad:

Informants should be asked to complete the grid at Q.8

- **Holidays starting during record keeping BUT ending after record keeping period finishes.**

  If in the UK:
  Attempts should be made to persuade informants to keep records while away   for the relevant days.

  If abroad:
  Respondents should be asked to record at Q.8:
  The date of departure.
  The number of days they will be outside the UK.
  The amount of travellers cheques and currency (£ 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.

Special circumstances

At the end of record-keeping, details of special circumstances should be recorded to indicate whether the normal spending pattern has been affected.

Checks

Further information required
The back page of the diary is for you to note what further information you require from the informant at your next visit.

Carry out a check on entries made in each diary at your checking calls. At the final checking /collection call ensure full details as outlined in the guide and reminder check list have been entered.

Complete one check list card for each household and send it,   **in the same envopak as the diaries,** to Titchfield.

TILL RECEIPTS - meaningless descriptions must be checked out e.g. Flntr Kokomo, Oyster Leg, F/F Red Pack, these items cannot be correctly coded. Probe out any generic descriptions, e.g. alcohol, vegetables, produce.

FRUIT & VEGETABLES - please note whether tinned/frozen/fresh.

MEAT - is not an adequate description, the client requires a full breakdown of type of meat, in the case of a butchers pack, lamb, beef, pork must be identified.

NATIONAL LOTTERY - please show scratchcards separately. For entries for the draws, please state which draw is entered i.e. Wednesday, Saturday or both draws.

"UMBRELLA" PAYMENTS - for example 'Child's school wear £65.00, Marks and Spencer £24.00' must be broken down to the separate items.

ROUND OF DRINKS - please probe type of drinks i.e. beer, cider, sherry and explain more obscure descriptions e.g. two dogs, shark bite, decoda.

SOCIAL ENTERTAINMENT - please identify type of entertainment, and, for example are drinks included?

BUSINESS PURCHASES - do not include any item purchased for business purposes.

COOKERS - it must be stated if these are gas/electric/solid fuel.

PRESENTS/GIFTS/HOUSEHOLD GOODS - these terms are not acceptable. Please specify exactly what was purchased.

MEANINGLESS ENTRIES AT Section 6 - please make sure any entries can be coded correctly e.g. 'deposit at China Fleet Club' £38.00'.

YOUTH DIARIES - do not ring/circle the 1 box on the back of Youth Diaries unless there is a clear explanation.

FES DIARY : KEYING AND CODING INSTRUCTIONS

CONTENTS

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.

- Around 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.

- Each adult is also asked to give detailed information about his or her income in the Income Section of the questionnaire. The information about each person is aggregated up to provide information about household income and is used to predict the effect on households of changes in taxes and benefits.

- The questionnaire information is captured by field interviewers on laptop computers using Computer Assisted Personal Interviewing (CAPI). The average interview lasts for an hour and a half.

1.   Introduction to FES for new editors

- 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.

- The diaries are then sent direct to the Telephone Unit in Titchfield where they are booked in and placed in covers.

- Fact sheets containing key information from the household and income questionnaires are attached to the covers. The fact sheets show the household composition, whether child benefit or income support is received and other useful pieces of information which may assist in coding.

- The diaries are passed to TU coders for keying and, in 10% of cases, verification.

- Editors in the FES Field Office at Drummond Gate carry out a detailed check on the data collected in the FES questionnaire in order to resolve any discrepancies and to fill in any missing values, by reference to external sources of data. The editors also carry out certain checks between the diary and questionnaire data, and try to resolve any coding queries which have been flagged up in Titchfield for their attention.

- After coding and keying, diaries are sent to the editing team at Drummond Gate. A batch of keyed paper diaries is usually sent up to London every day.

- Suggestions. As you work on the diary you may see gaps in the coding dictionary where additional codes are required. Suggestions for new dictionary entries or additions to the A-Z look-up table should be collected and sent to Dave Wood (London, Research) at regular intervals.

2.   Layout of the paper diaries

Adults (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.

Adult diaries
The sections of the adult diary help to prompt respondents to remember and record different types of item. Some of the sub-divisions are included specifically because they are helpful when coding diary items (particularly the sections for take-aways and food eaten out).

Left hand pages

1   **Food and drink brought home**
(including alcohol brought home; excluding take aways)

Till receipts are often used in Section 1. If other (non-food items) are recorded on the till receipt they will not usually have been crossed out and transferred to the appropriate section, apart from clothing and footwear (because of the extra information needed).

2   **Take-away meals and snacks eaten at home**
(The same codes are used for take-aways, take-aways delivered to the home and meals on wheels - see code range 03.12)

Right hand pages

3   **Meals, snacks and drinks (including alcohol) bought and consumed away from home**:

3A   those bought at work or at school *(code range 03.13)*

3B   those bought at catering establishments such as a cafe, restaurant, hotel or pub   *(code range 03.14)*

3C   those bought at a shop, kiosk and other non-catering outlet   *(code range 03.15)*

4   **Clothing and footwear**, by sex and, if under 16, age.

5   **Any other payments**
*(including regular purchases such as newspapers, cigarettes, stamps etc.,
and any other payments like petrol, leisure, household, entertainment etc.)*

2.   Layout of the paper diaries

Youth diaries

The pages of the Youth Diary are not divided into separate sections for different types of expenditure.

We simply ask children to record a description of the item purchased and to record the price paid.

As from 1998, we are also asking children to tick an extra column in the diary against any items of food which were eaten at home. The assumption is that most snacks such as crisps, sweets, ice creams and soft drinks purchased by children are actually eaten out of the home, and so should be coded hierarchically (to codes in the 03.16 range). The coding dictionary should ONLY be used for snacks and other food items in Youth diaries if they are specifically recorded as having been taken home.

3.   London contacts

Any problems with keying or editing the paper diary should be referred by a Team Leader to the FES team in London.

The contacts are:

Coding advice/
Currency conversion: **FES Field (editing)**
                                         Peter Braj-Dyal (ext 5426)
                                         Adam White (ext 5449)

Flow of cases/
persistent coding problems: **FES Field Officers**
                                         Colin Setchfield (ext 5447)
                                         Peter Braj-Dyal (ext 5426)
                                         Adam White (ext 5449)

Suggested updates to dictionary/   **FES Research**
queries on coding procedures: Dave Wood (ext 5443)

Diary design/   **FES Research**
research queries   Paul Hunter (ext 5316)

Technical problems with   **SCB**
fact sheets/reports: Alan Francis (ext 5349)
                                         James Elder (ext 5341)

4.1   Overview of coding and keying of diaries

- The diary input and editing is in CAPI, using Blaise III.

- One coder is responsible for coding the item descriptions and keying monetary amounts. In 10% of cases a second person will verify the monetary values.

- The first coder is responsible for keying all of the diary information, including the amount spent and any refunds, into the Blaise questionnaire.

- The first coder uses computer-assisted coding to select an expenditure code for each item. Most items will be coded from a coding dictionary; but take away food and meals bought/ consumed away from home and all alcohol items are coded using the hierarchical coding frame.

- The first coder runs range checks on the monetary amounts, to identify amounts which are improbably large, and marks up on the paper diary any codes which replicate expenditure items in the household questionnaire.

- In 10% of cases a second coder is responsible for re-keying the monetary amounts in order to verify accuracy of the initial keying. The cases to be verified are determined by supervisors (see separate instructions in TU).

- 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 query the item with the Team Leader: do not guess.

4.2   General instructions

Till receipts

Often a till receipt will have been attached to the paper diary. If so, items will not have been rewritten in the diary. All till receipts should have been annotated by the respondent/ interviewer to ensure that they give sufficient detail to identify the exact type of purchase and the amount. Till receipts with insufficient detail should be referred to your team leader.

If items from a till receipt have been duplicated in the paper diary, cross through the paper diary entries and code from the till receipts.

Till receipts should all be stapled securely to the appropriate page in the diary. It is important to check that the date on the receipt is the same as that of the diary page.

After coding a till receipt, check that the number of items coded agrees with the number of items on the receipt. This should prevent items being omitted.

Check the bottom of the till receipt to see whether a credit card was used, or any coupons/vouchers.

Multisaves

These are always generated by the item shown immediately above. If the amount saved is the cost of an individual item, simply cross out one of the items and do not key it. If the amount of the multisave is <u>not</u> the cost of one item, simply subtract the amount saved from the cost of the previous items. It is not necessary to apportion the saving across all of the items.

Diaries with no entries

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 the end of the paper diary (page 35) 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).

Items omitted

If an item has not been coded in error, and the coder realises this before exiting the questionnaire, enter missed items after day 14 taking care to code the actual day of expenditure.

4.2   General instructions

Multiple items

Under Blaise III it has been possible to set up a 'Repeat' key on certain diary fields. These are: Day, ExpDesc, Coding, Credit and Shop. Pressing F5 for these items brings up the same value for the field as that entered in the previous row.

Although F5 is useful for multiple entries for the same item, it is still allowable to enter multiple items as, for example, 'pet food x 6'. The items would need to be easily blocked together and the price of each be the same. For example: where 12 tins of pet food are purchased costing 43p per tin each, enter pet food x 12 - under ExpDesc (description) then £5.16 under Paid1.

Saving work

The F2 key can be used to save work at any stage while inputting the diary. If you save work at intervals then you will not lose the entire case in the event of a system failure. Instead you will be able to pick up the last saved version.

We suggest that you save your work at each of the **AnyMore** questions, but you may want to do so more frequently, particularly if system failures are threatened.

Incomplete codes

The Blaise III instrument does not allow an incomplete code to be entered *at any stage*.

- If you are unsure about the code to use and want to refer to your team leader, you should enter your best estimate of the correct code and make a note of the query in the usual way. Once you know the correct code to use, return to the case and overwrite the incorrect code.

- An alternative is to exit the case at that point and work on a new case until you have resolved the query.

5.1   Preparations for keying

- At the start of a shift check the white board for any updates.

- Before starting to code a diary CHECK the following.

    i.   Any Direct Debits or Standing Orders which should not be coded. Cross these out and flag them.

    ii.   Any items that you think will stop you completing a diary for example:

    -       whether till receipts mention any coupons/vouchers/ staff discount/VAT;

    -       entries for foreign currency at the end of the diary. The commission to be deducted on travellers cheques and foreign exchange, also the exchange rate, and "money spent abroad" is calculated by the coding supervisor (with advice from London).

    -       non-itemised receipts etc.

            Put a note outlining the details on the front of the diary and refer these to the Team Leader.

- The new Blaise III instrument allows up to 400 items to be keyed for each case. It is therefore unlikely that this number will be exceeded in a single diary, but if there are long till receipts in a diary a quick check to ensure there are enough lines to be able to code the items may be necessary before starting to key the diary. In the rare event that there are more than 400 items, the team leader will reduce the number by grouping similar items to one entry, where this is possible.

- 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 the numbers do not match, refer to your team leader. Checking these details initially will ensure that as few coders as possible access a diary and make mistakes less likely.

5.2   Accessing the case

Follow local instructions for getting to the Blaise menu.

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

- This will bring up the first screen which prompts for the four variables which define the serial number for the case. Please enter these numbers **very carefully** as any errors may lead to additional work for both SCB and editing staff. Therefore, it is absolutely essential that serial numbers are keyed accurately.

i.   **Area**   *range 1001 to 9999*   (Area or Quota number)
      Enter the number shown in the **Area** box on the paper diary, not from the front of the folder.

ii.   **Address**   *range 1 to 17*   (Address number within the quota)
      Enter the number in the **Ser** box on the paper diary.

iii. **Hhold**   *range 1 to 3*   (Household number at the address)
      Enter the number in the **Hld** box on the paper 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 your team leader (it will usually mean that the number should be keyed as 1).

iv.   **Person**   *range 1 to 14*   (Number of the person within the household)
      Enter the number in the **Per** box on the paper diary. For all people (adults and children) this number will be somewhere in the range 1 to 14.

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

5.2   Accessing the case

- If you have entered a correct serial number the following questions will appear on screen.

i.   **DiaryTyp**   *1   Adult diary*
                        2   Youth diary
This new variable is needed to identify the type of diary (adult or youth diary) because this is not clear from the person number.

ii.   **PABEd1**   first coder enters their own interviewer authority number
       range 4000-4999

iii.   **PABEd2**   first coder leaves this blank by pressing the Enter/Return key.
       range 4000-4999

iv.   **CheckMe1**   do you want checks switched on.
                        1   Yes
                        2   No
Code 2 (no) when entering data, but checks **must be** run before signing off the case.
An error message will appear if 2 (No) is coded. Suppress this by typing 'S' at this stage.

v.   **IntBox**   routed for youth diaries only (if DiaryTyp = 2)
                        1   if number "1" is ringed on back cover of the child's diary.
                        (or enter/return)

If the number "1" at the top of the back page has been ringed code 1 (Yes) and attach a query slip to the outside of the hard file cover to bring it to the attention of the London editors.

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.

vi.   **PAB_Done**   Current status of the case - Should be coded 2 (No) until the diary is complete.
                        1   Diary complete
                        2   Diary not complete
                        5   Nil expenditure both weeks
                        6   Nil expenditure week 1
                        7   Nil expenditure week 2

On completion of the diary, coder 1 should return to **CheckMe1**, re-code this to 1 (Yes) and run the edit checks by pressing END (see Section 5.6). When these have been run and resolved recode PAB_Done to 1, 5, 6 or 7 as appropriate.

5.3   The diary entries

General notes

- Every row of the diary starts with an entry for day order (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.

- There not be any empty rows 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, use an entry 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.

- 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.

- Queries that stop you carrying on with a diary should be referred to the team leader. Other items or queries that require initialling should be put on a query sheet to be dealt with by the team leader when the rest of the diary has been coded.

- If you are in any doubt about procedures, please check with your Team Leader.

5.3   The diary entries

i.   **Day**   Day order
                range 1 to 14

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.

ii.   **ExpDesc**   Text description of the item.

Enter a description of the diary item, eg cooked ham, men's shoes.
Then press SPACE Bar.
You will be taken into the computer-assisted coding (CAC) box - see Section 5.4.

iii.   **FinCode**   This is entered via the computer-assisted coding box - see Section 5.4.

iv.   **Paid1**   Amount paid - in pence.

Enter the payment shown in the "amount paid" column for the item. Enter as pence e.g. £52.30 should be keyed as 5230. If the amount paid is missing, refer to your team leader.

Do **not** key any amount that is in foreign currency. Check whether money spent abroad is in £ sterling or foreign currency. If in foreign currency, contact London Field office for the conversion to £ sterling.

The remaining diary fields do not apply for Youth diaries

v.   **Credit**   If paid for by credit card (or charge, shop or store card)
                1   Yes
                2   No

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 letter 'C' is ringed against the item in the paper diary, key 1 at **Credit**; if not key 2 (No).

If there is any indication that the item was purchased with a **debit card**, such as Barclays Connect or Switch, code 2 (No) as these are not credit or charge cards.

5.3   The diary entries

vi.   **Qualif**   Self-supply items (from a self-employed respondent's own business) and non-business expenses. NB. business refunds are covered at the next item - **Refnd1**.

>   *1   Own shop/ farm*
>   *2   Non-business expense*
>   *3*
>   *Press Enter/ Return if neither of above*

Use **code 1** 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 and did not actually pay out any cash.

Code 2 should be used in two circumstances:

(a) Refunds for *informal* (rather than business) reasons. Informal refunds are indicated if there is an amount entered in the REFUNDS column but 'B' is not ringed to indicate a business refund.

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).

(b) Use code 2 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 neither code 1 nor 2 applies, leave the field empty by keying ENTER.

vii.   **Refnd1**   Amount refunded for business purposes.

>   *Amount refunded in pence.*
>   *If no business expenditure, press Enter/Return.*

Business refunds are indicated by an amount entered in the REFUNDS column and where 'B' is ringed in the final column of the paper diary. (For non-business refunds, see **Qualif** above.) Enter the amount refunded at **Refnd1.**

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

(This variable is also used by London editors so some on-screen instructions are for them.)

5.3   The diary entries

viii.   **ToWhom**   Person number of child given money.

Enter person number of child.
Enter/ Return if not known.

This variable is routed in adult diaries only for pocket money and money gifts given to children (codes 14.03.08 to 14.03.10).

Respondents are now asked to record the name of the child to whom money is given. The interviewer may have written the person number of the child next to their name. If not, please check the fact sheet for the child's number. The child number should be coded for ALL children, regardless of whether they kept a youth diary.

ix.   **ChildD**   *Routed on adult diaries for codes involving money given to a child.*
Did the child keep a diary?

1   Yes
Enter/ Return for No

This variable is routed only for certain expenditure codes: pocket money (14.03.08), school dinner money (03.13.02), school travel (11.02.10), other money given to child for specific purposes (14.03.09) and cash gifts given to children (14.03.10).

The letter "D" should be entered in the paper diary beside any items given to a child in the household aged 7-15 who is keeping a diary. The name or person number of the child should also be entered. If "D" is not entered look at the fact sheet to see if the child is keeping a diary: if so, enter a "D" in red next to the entry.

x.   **Shop**   Shop code. Routed on adult diaries only.
Range 1 to 65. Code selected by Computer-assisted coding.

A shop code is needed for most expenditure items in adult diaries, but not for meals out, take away meals or services (housing costs, utilities, etc.). The question allows RPI to compare expenditure patterns at major stores with those at smaller outlets.

•   Press space bar to access CAC screen.   Either:

(a) in "Input box" type the name of the shop (or first letters) as recorded in the diary (DO NOT press Enter/ Return until you want to select a code); or
(b) arrow down the list to select the shop.

Return on the shop name and the code is selected directly.
You are returned automatically to the next row of the diary.
To repeat the shop code entered on the previous row of the diary, press F5.

Note that it is NOT possible to enter the shop code direct, but it is possible to copy the entry from the previous line.

5.3   The diary entries

The current list of shop codes is as follows. Please note that it is much more comprehensive than previous years, and that some stores appear in places you wouldn't necessarily expect them – eg Debenhams, Threshers, Dolcis.

Code	Shop/description	Code	Shop/description
1	Missing	47	John Menzies
2	Local/corner shop	48	Jumble sale
5	Aldi	49	Kwik Save
6	Alldays	50	Lillywhites
7	Allsports	51	Littlewoods
8	Argos	52	Lo-cost
9	Asda (including Dales)	53	Marks & Spencer
10	B & Q	54	MFI
11	Boots	55	Morrisons
12	British Gas	56	Mothercare
13	BHS	57	Multisports
14	Budgens	58	Netto
15	Burton (Arcadia group – includes Top Man, Top Shop, Principles, Dorothy Perkins, Evans, Debenhams)	59	Next
16	C & A	60	Norweb
17	Car boot sale	61	Oddbins
18	Charity shop	62	Powerhouse
19	CJ Clark Ltd (Clarks, Ravel, K Shoes, Crockets, Rohan)	63	Safeway (& Presto)
20	Comet	64	Sainsbury's
21	Co-op (Leo, Homeworld, Market Fresh, Stop & Shop, Pioneer, Living)	65	Savacentre
22	Crazy Prices (NI only)	66	Scotpower
23	Curley's (NI only)	67	Sears Plc***
24	David Greig	68	Seeboard
25	Disney Store	69	Shoprite
26	Dixons (PC World, Currys, The Link)	70	Somerfield, Gateway, Food Giant
27	Do-It-All	71	Spar
28	Dollond & Aitchison	72	Specsavers
29	Dunnes Stores (NI, not Dunn & Co)	73	Stewarts (NI only)
30	Early Learning Centre	74	Superdrug
31	Energy Centre	75	Supervalu (NI only)
32	Etam	76	Tesco
33	Farmfoods	77	Texas
34	Game (computer games shop)	78	Thorn EMI (Radio Rentals, HMV, Dillons)
35	Granada (Electronics, not service stations)	79	Toys R Us
36	H Samuel (Jewellers)	80	Victoria Wine (and Threshers)
37	Halfords	81	Vision Express

38	Hamleys	82	Waitrose
39	Heelas	83	Wellworth (NI only)
40	Homebase	84	Westside Stores (NI)
41	House of Fraser*	85	WHSmith (Our Price)
42	Iceland	86	Wickes
43	IKEA	87	Wilkinson
44	Index Catalogue Shop	88	Woolworth
45	JJB Sports		
46	John Lewis Group**		

*Also comprises Army & Navy, Barkers, Binns, Cavendish House, David Evans, DH Evans, Dickins & Jones, Dingles, Frasers, Hammonds, Howells, Jollys, Kendals, Rackhams. These stores should be coded 41.

** Comprises John Lewis, Cole Bros, Bonds, Bainbridge, Trewins, Jessop & Sons, Robert Sayle, Peter Jones, Knight & Lee, Tyrell & Green. These stores should be coded 46.

*** Comprises Shoe City, Shoe Express, Dolcis, Roland, Cartier, Hush Puppies, Cable & Co, Warehouse, Richards, Wallis, Miss Selfridge, Adams, Pride & Joy, Selfridges, Freemans)

Use **Code 2** if the shop is not on the list or the description is local shop, market, milkman etc.

Use **Code 1** if the respondent has failed to record the point of purchase. If the respondent clearly has a usual pattern of shopping, eg. has bought similar items on another day, then use the appropriate code for the usual shop.

xi.	**Paid2**	These fields are only used by the verifying editor.
	Refnd2	

5.4   Coding expenditure items

- For most types of purchases you should access the coding dictionary to get a match for the description you have keyed, and so find the correct code.

  This method should be used for items in section 1 on the left hand page and sections 4 or 5 on the right hand page of the paper diary, i.e.

1.	Food and drink brought home (except alcohol)
4.	Clothing and footwear
5.	Other payments today

- Hierarchical coding should be used to code items in sections 2 and 3 of the adult paper diary and any alcoholic drink, whether brought home or consumed away from home. It should also be used for school dinners and other food eaten out of the home by children.

  This method should therefore be used for:

  Adult diaries: take away meals (section 2);
  food and drink bought and consumed away from home
               (sections 3A, 3B and 3C);
  alcoholic drinks in section 1 or 3.

  Youth diary: school dinners;
  other hot or cold meals;
  snacks, sweets and drinks NOT recorded as being consumed at home.

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, i.e. for take aways and meals away from home. Items in those categories do not need to be transferred to the appropriate place on the paper diary. Just write the correct code next to it in red.

- 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.

5.4   Coding expenditure items

Using the coding dictionary

- After entering a description of the item at ExpDesc, press SPACE BAR to access CAC.

- The CAC screen shows a list of 2-digit coding categories. Type 'L' to select look-up, which takes you into the coding dictionary.

- The coding program searches for the best match in the coding dictionary to the description entered. Often a number of possible matching items will appear on screen. The highlighted item may not be the best match, so browse down the list using the up and down arrows.

- If you are satisfied that an item in the list matches the item in the diary, press ENTER.

- You are then presented with the selected 3-level code together with the label for that code, which indicates the type of item 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 **Coding** box.

Adding to the description

- It is possible to change the description you have entered at ExpDesc while in the coding dictionary. This can be done simply by overtyping the description, or adding text at the appropriate point. This may be helpful if there is no match on the item listed and you can think of an alternative way of describing the item.

  For example, the coding dictionary does not generally list brand names for items. If you enter the description "Fuse bar" you may not find an adequate match in the dictionary. Amending the description to "Chocolate bar" would bring up the correct code for sweets and confectionery.

Wrong code selected

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

Return to the **Coding** field and delete the code - press DEL key.

Edit the text description by correcting the entry in the ExpDesc box. Then access computer-assisted coding again.

5.4   Coding expenditure items

No match found

• You will find that some items are not listed in the coding dictionary and you will not easily be able to edit the description in order to find the appropriate code.

• Items which are difficult to code should always be queried with your Team Leader but you may be able to discover the likely code before passing on a query.

   i.   One option is to access the A-Z look-up table which gives advice on some items and on descriptions which are found on till receipts. (See instructions below for how to access the A-Z).

   ii.   Otherwise you can use the hierarchical coding frame to home in on the likely code. We would suggest that you also look at the descriptions and examples given in the paper documentation of the coding frame when using hierarchical coding in this way.

• You will need to select a complete code in order to move on in the diary. Remember to make a note of the queried entry and to refer it to your Team Leader.

Hierarchical coding

• Enter a description of the item at **ExpDesc**, then press SPACE Bar to start the CAC system. For hierarchical coding you start from the screen which lists the higher level coding categories - the first screen shown within CAC. DO NOT press 'L' to carry out a search within the coding dictionary.

• There are three levels of codes. The first is the broad area of expenditure (e.g. 3 for food); the second is the sub-category of expenditure (e.g. 3.12 for take away meals eaten at home); the third is the detailed individual code (e.g. 3.12.1 for hot take away meals eaten at home).

• 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.

Food in Adult diaries

- In adult diaries 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:

5.4   Coding expenditure items

Section	Category	Second level code
2	Take away meals brought home	12
3A	Meals bought at work/ school	13
3B	Meals from catering establishments	14
3C	Meals from other shops/ outlets	15

- After keying the second level code you will be taken to the third level. This mainly distinguishes between hot or cold meals/ snacks; food eaten on or off the premises; and snack items such as confectionery, ice cream and soft drinks.

- Enter the correct third level code. Check that the description for the full three-level code 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.

Food in Youth diaries

- Food eaten out which is recorded in Youth Diaries is coded to 3.16.

- The full (three-level) codes available are as follows:

3.16.1	School dinner (child)
3.16.2	Hot meal/ snack away from home (child)
3.16.3	Cold meal/ snack away from home (child)
3.16.4	Confectionery away from home (child)
3.16.5	Ice cream away from home (child)
3.16.6	Soft drink away from home (child)
3.16.7	Hot take-away meal/snack eaten at home (child)
3.16.8	Cold take-away meal/snack eaten at home (child)

- Items such as ice creams, sweets and soft drinks are assumed to have been eaten out unless it is stated that they were taken home. The Youth diary has an extra coding column to record whether these snack items were taken home.

- Adult codes 3.12, 3.13, 3.14 and 3.15 must not be used for entries in Youth diaries.

Alcohol

- With alcohol the key distinction is between alcohol bought at off-licensed premises and brought home (4.1) and alcohol which is both bought and consumed on licensed premises (4.2). Alcohol brought home will be in section 1 of the paper diary, alcohol consumed away from home will be in section 3A, 3B or 3C.

5.4   Coding expenditure items

- The third-level categories for alcoholic drinks are:

1	Beer and lager
2	Cider
3	Table wines
4	Champagne and sparkling wines
5	Fortified wines
6	Spirits and liqueurs
7	Alcoholic soft drinks, alcopops
8	Alcohol not otherwise specified

  Code 8 should be used only if the type of alcohol is not specified. Please refer to your Team Leader if the amount spent on unspecified alcohol is substantial (more than £10).

- Some examples of drinks in these categories are listed in the paper documentation. Some alcoholic drinks are listed in the coding dictionary, so you may want to look at these entries to work out which code should be used for a named drink that you are not familiar with.

The A-Z look-up table

- The A-Z listing gives additional information about some less common items (e.g. regional products or brand names) and explains some descriptions you may find on till receipts.

- The A-Z is in a 'parallel' block to the diary instrument, which means that you can move across from one to the other at any time.

- If an item cannot be found in the coding dictionary and you want to check the A-Z:

  i.   Press CTRL + ENTER. The two parallel blocks are shown on the screen.
  ii.   Use the arrow key to highlight 'AZLookup' and press ENTER.
  iii. Select the Default option by SPACE BAR. This will show an alphabetical list.
  iv.   Either arrow up and down the list to search for an entry, or type the description in the input box.

- Information from the A-Z is not automatically copied across to the diary instrument. You will need to make a note of the suggested code.

- Return to the diary instrument.

i.   Press ENTER to show the parallel blocks.
ii.   Select the diary instrument (currently DRY9904B). This will take you to the start of the case.
iii.   Press END to go to the point that you had reached in the diary.

5.5   Finishing off the diary

AnyMore

> *1   Yes*
> *If none, press Enter.*

The Blaise diary allows for 400 separate items, split into 8 blocks of 50 rows. At the end of each 50 item stretch you are asked if there are any more items to be keyed. If there are, code 1 to reach the next block.

Items at the end of the diary

Ensure that when day 14 has been reached, the remaining pages of the diary are also checked for entries for payment of credit cards, interest on credit cards and winnings. If there is an entry for these items (on page 34 of the diary) you will need to jump to the tables for interest and/or winnings on the Blaise questionnaire.

After keying the final diary purchase press Page Down until you reach **XJump,** which should be left blank. Press Enter to pass **XJump** and bring up the screen for interest on credit card payments.

Interest on Credit card payments

i.   **AnyInt** If any interest shown on credit account paid during the fortnight
> *1 Yes*   If Q6B = Yes, and there is an entry in the table on page 34.
> *If none, Page Down or press Enter to reach **AnyWin***

ii.   **PayInt**   *Amount of interest in pence*

If AnyInt is coded 1 enter the amount of interest at PayInt.
Enter each payment on a separate row.

iii.   **IntCod**   Expenditure code for interest payments.

The computer will automatically assign the correct code.

•   Page Down or Return/Enter through the items in the table to reach the questions on Winnings.

5.5   Finishing off the diary

Winnings

i.   **AnyWin**   If any Winnings recorded in table at Q7, page 34.
                        1   Yes
                        If none, Return/Enter to end of Winnings table.

ii.   **PayWin**   *Amount of winnings in pence*

        If AnyWin is coded 1 enter each type of winnings on a separate row in the table.

iii.   **WinTyp**

Select the appropriate code for the type of winnings from the list shown on screen.

        1   National Lottery - Saturday draw
        2   National Lottery - Wednesday draw
        3   National Lottery - both Saturday and Wednesday draws
        4   National Lottery instants/scratchcards
        5   Irish Lottery (N Ireland cases only)
        6   Other lotteries (excluding National/ Irish)
        7   Football pools
        8   Bingo
        9   Bookmaker, sweepstakes, other betting

iv.   **WinCod**   Expenditure code for winnings.

        The computer will automatically assign the expenditure code for the type of winnings
        selected from the list at WinTyp.

•   Press Return/Enter through the items in the table to reach the end of the diary instrument.

Exiting

Press Return/Enter to reach the end of the table for Winnings and reach the end of the diary
instrument. If you choose to end the questionnaire at this point, you will be prompted to save the
form. Press 'S' to save work.

Alternatively, Page Up to return to **CheckMe** and run range checks - see Section 5.6 for details.

5.5   Finishing off the diary

Queries

- Any items being queried, either on a till receipt or elsewhere in the diary, should be indicated with an asterisk using a red pen. This enables the Team Leader to more easily identify items to be queried.

- Before finishing the case, remember to check back that all queries have been dealt with. If necessary, correct the expenditure codes for queried items.

- When entering a diary to complete queries, the original editor's interviewer number should not be altered. However, it is important to remember to sign the query sheet/s.

- If exiting a diary because of queries or because the diary is incomplete, a slip of paper should be stapled to the diary cover indicating the position reached before exiting and also the point at which the following coder should continue.

- When everything has been completed, the final coder should complete the front of the diary with initials, interviewer number and date. Staple all query and verification sheets to the back of the diary cover (placing the verification sheet on top).

- It is not necessary to approach the Team Leader with a query unless you are unable to continue coding the diary. Other queries should be listed on a query sheet and placed in the "query" tray.

5.6   Running checks

- When all diary entries have been keyed, including interest on credit cards and winnings, Coder 1 should return to the serial number screen either by using the 'Page Up' key or by exiting and re-entering the case.

- The checks should are run by re-coding **CheckMe1** 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. It is also helpful at later stages of processing if you edit the description of the item in ExpDesc by adding *(OK)* at the end of the description.

- If the amount seems improbable refer to your team leader.

Expenditure code checks

- Certain codes are checked because the main source of data for these is the Household Questionnaire. The codes include insurances, credit payments and educational courses.

- The check on these codes 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 with the line number (e.g. A68) 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.

5.7   Exiting the case

• 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.

Exiting from AnyWin - at the end of the diary

• Press ENTER to exit the form.

• You are asked if you want to save the form and quit.
  Type 'Y' or Enter to save the form.

• To return to the main diary menu at this stage press ESC.
  Select Exit if you are not going on to another case.
  Select Examine Form if you wish to enter another case

Exiting in the middle of a diary

• When leaving a diary which is not complete, use <CTRL-ENTER> to exit.

• Select Q for Quit.
  Then S or Enter to Save

• Complete a Part Diary slip and staple this inside the front cover of the diary (taking care not to restrict the use of the factsheet). If completing queries on a diary coded by someone else, do not change the interviewer number; but when the queries have been resolved, change PAB_Done to 1, complete the bottom of the query sheet with YOUR IntNo, initials and the date; then tick PAB DONE = 1.

• Staple the range check sheet and any query sheets into the back of the diary with the range check sheet on top.

6.   Verification instructions

- 10% of all cases are verified. The criteria for selecting cases for verification are determined by the Team Leaders.

- Verification must be not be carried out by the same coder who did the keying.

- There is 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 team leader.

Verification of monetary amounts

- Coder 2 should call up the case (see Section 5.2)

- Arrow to the question **PABEd2** and enter your authority number.

- At **CheckMe1** code 2 and suppress the error that comes up (S). The checks should have been carried out by the first coder..

- **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 Team Leader.

- 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 **Refnd2.**

- Check the paper diary carefully for any notes made by the first coder 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 and correct the figure which is in error (either **Paid1** or **Paid2,** or **Refnd1** or **Refnd2**).

6.   Verification instructions

- If an item was completely missed by coder 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 for credit card interest or winnings. If there are entries, Page Down to the table **AnyInt** and PageDown to **AnyWin** to ensure details have been recorded. If these items have not been recorded, key them and note the omission on your error sheet.

- Then press HOME to return to the serial number screen.

Signing off the case

- When verification is completed and all discrepancies   resolved, press HOME to return to the serial number screen.

- 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, then Q, then Y or Enter to save the case.

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

7.   Selected 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.

7.1   Food and drink

Items grouped with one price
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. If the items have different codes they need to be entered separately and the price split accordingly: refer this to you Team Leader.

Unspecified items
Expenditure codes for food not defined (3.11.10, 3.5.12 etc) should only be used sparingly when it is impossible to determine what an item is. All items should be referred to the Team Leader.

Grocery accounts
If a bill for a grocery account is paid during the fortnight and has been itemized on the paper diary, enter the individual items with prices and *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.

Reward vouchers/ Savings stamps
If a voucher or stamps from a reward scheme is used to reduce a supermarket bill, all items covered by the voucher should be reduced in proportion to the value of the voucher. Refer up ambiguous cases. Vouchers for named products should be subtracted from the cost of the relevant items only.

Christmas hampers
This is usually an instalment payment, in which case 14.01.01 will apply. If the purchase is definitely an outright purchase, code 03.11.10. If in doubt, refer up.

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.

Meals bought and consumed away from home

If 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. If it is not clear whether alcohol is included, refer the case up for advice.

7.   Selected coding points

Alcohol
A round of drinks at a pub should be coded as alcohol at licensed premises, n.o.s. (04.02.08).

7.2   Non-food items

Items grouped with one price
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. If, however the items are on separate lines or have different codes they need to be entered separately and the price split accordingly: refer this to your Team Leader.

Unspecified items
The following expenditure codes must be used **very sparingly.** If you do use them, flag the case up.

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

Private Catering
Catering for funerals should be coded to funeral expenses (8.4.8). Other catering by contractors should be coded to 8.5.1.

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.

Children's parties
If contract catering code 08.05.01; otherwise code 13.01.04.

Gifts
Note that there are separate codes for cash gifts to people IN and OUTSIDE the household.
Within the household
Cash gifts to adults - code 14.3.6
Pocket money to children under 16 - code 14.3.8
Gifts to children under 16 - code 14.3.10
Wages for au pairs and domestic help (except child care) - code 8.1.1

Outside the household
Cash gifts (and gift vouchers) coded to 14.3.2.

If a specific item or present is bought it must be coded to the item.

7.   Selected coding points

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.

Expenditure abroad
Abroad includes the Isle of Man, Channel Islands and the Irish Republic.

Always check the end of the diary as, if a holiday was taken, the respondent should have noted the total amount of money taken away and the dates and duration of the holiday.

Amounts of foreign currency must be converted to £ sterling. Ring Field in London for advice.
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 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.
For 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 x £42.86 = £257.16.

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

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 Team Leader.

Gift vouchers/ Refund vouchers

Payment by gift or refund vouchers is treated as payment by cash: simply enter the cost of the item at **Paid1** regardless of whether the payment was made by cash or vouchers or both. Where a respondent has returned an item and obtained a refund (or voucher) during the diary-keeping period, the purchase of the original item should have been crossed through and labelled 'refunded'. Coders need take no action in these cases.

Instructions for Youth Diaries

1.   Background

Youth diaries were introduced on the FES in April 1995. This followed a series of methodological studies to assess the quality of the data recorded by children, the appropriate age range of children to be asked to complete a diary, and an appropriate level of incentive payment to be offered.

The studies, and subsequent experience, have shown that children are usually very keen to keep their own diary. In some cases children may even help to persuade their parents to take part so that they can have the chance to earn the incentive payment.

The first results of children's expenditure were published in 1997. Some examples of the results are given at the end of this instruction document.

2.   Placing the youth diary

a.   Who is eligible

Children aged 7 to 15 years are eligible to keep the youth diary. In the household grid the variable *DiarStat* records whether each child aged 7 to 15 is completing a youth diary, an absent spender or refused to participate.

If children are staying at a sampled address which is not their normal place of residence they will not be defined as part of the sampled household and they should not take part in the diary-keeping task.

b.   Non-response by children

The FES does not require response from all children in order for the household to count as responding. However, there is currently a very high level of response among children in co-operating households, at around 98%.

> *Note that refusal by a child does not invalidate the household's response.*

c.   Absent spenders

The rules for absent spenders are different for those aged 7 to 15. If a child is absent from the household at the placing call but is going to return to the household within 2 days of the interview, delay the start of the record-keeping until they return.

If the child is not going to return until more than 2 days later, start the diary-keeping after the interview and treat the absent child as an absent spender.

If a child leaves the household after the beginning of the diary-keeping period they should continue to complete the diary and then post it back to you. The adult diaries should be collected as normal.

d.   Incentives

Each child is offered £5 for keeping the two-week youth diary.

The same rules apply as for over-16s, in that all respondents must complete the two weeks of the diary in order to receive payment. Those who only partially complete a diary should not receive the payment.

Like the adult payment, the child's incentive is sent out about four weeks after the diary is received at the office.

e.   Explaining the task

If the children are present at the placing call, explain the diary-keeping task to them yourself. If any of the children are absent at the placing call, brief the parents on the task and ask them to explain to their children.

It is important to try to see the children on at least one checking call, and particularly if you did not yourself explain the diary keeping to them. We are therefore happy for you to make an extra checking call especially to see children, if this is necessary.

3.　　Instructions for children

Give each child aged between 7 and 15 a youth diary.

a.　　What the diary covers

The children should write down everything they buy for themselves. We are interested in their personal (discretionary) expenditure with their OWN money. This may be from pocket money, gifts, money from a paper round etc.

The child should **NOT** include items bought for other people using the other people's money. For example, if a mother sends her son to buy a newspaper on her behalf, then he should not record the purchase. It should be recorded in the adult diary only.

If children are given money for a specific purpose, for example for bus fares or school lunch, they may not actually spend it on the intended item. Please ask them to record what they spent their money on, NOT the what they were given the money for.

> *We are interested in what the child actually buys with his or her own money.*

b.　　Listing each item

Children should record each separate item they buy on a new line of the diary. The diary is much simpler than the adult diary as the page is not split into sections for different types of item.

- They should describe what sort of item it was.

- Beside the description they should enter the cost in the columns headed £ and p.

- Unlike in the adult diary, we do not ask children to record the name of the shop in which each item was bought.

c.　　Describing items

The same coding frame is used for items in the child diary as for adults. So we are looking for a general description of the item bought, e.g. sweets, chocolate bar, fizzy drink, carton of juice, CD, leggings, trainers etc.

Children tend to give us a fuller description than we need, for example, writing down the type of sweets bought, or the name of the CD. This is fine, but please check that there is also a basic description of the item. You will be aware from your work on the adult diary of the sort of distinctions that are important to coders, although many of these are not particularly relevant in children's diaries because they do not buy such a variety of items.

Some important points to look out for in children's diaries are:

- Drinks - distinguish between fizzy drinks and other, non-fizzy drinks such as juices, Ribena and fruit drinks.

- Presents. This description is not adequate for coding. We need to know <u>what</u> the present was, e.g. voucher, tape, T-shirt, chocolates.

- Football (and other sports). Distinguish between an entrance fee for a spectator event and a charge to participate.

d.   Food and snacks eaten out

A large proportion of children's expenditure is on food and snacks, confectionery and drinks.

<u>Meals and snacks</u>. For meals and snacks, there are just three coding categories, so the actual contents of the meal or snack do not need to be listed.

Code	Examples
School dinner/ meal	School dinner/ meal is the only description needed.
Other hot meal or snack (not bought at school)	Meal at McDonalds Chips; Pizza; Take-away meal
Other cold meal or snack (not bought at school)	Sandwich Salad

The instructions at the front of the youth diary ask the children to identify these three types of meal. It may, however, be necessary to probe this information at the checking call.

For example:

- school dinners should be identified as such - we do not need to know the components of the meal, such as "crisps, yoghurt, sandwich";

- in the hot meals/snacks category we are expecting items such as chips from a take-away, meals at fast food restaurants or cafes;

- in the cold meals/snacks category, salads, sandwiches and so on will be included.

Ice-creams, sweets and drinks should <u>not</u> be included as meals or snacks. There are separate codes for these items (see below).

Confectionery, drinks and ice cream

Code	**Examples**
Confectionery eaten out	Sweets; Chocolate bar; Twix bar
Soft drink eaten out	Coke; Fanta; Apple juice; Ribena
Ice cream eaten out	Ice cream; Ice lolly

For these items, the FES clients are interested to split expenditure by children between food brought home and food eaten out of the home. In the main we expect that these items will be consumed out of the home, so the only instruction to children is that they put a tick in the column beside the price of the item if they took it home and ate/ drank it later.

Please explain this extra column to the child.
It need only be used for sweets and chocolate, drinks and ice cream.

4.   Procedures for Adult Diaries

a.   Instructions to adults

The rules for adults completing diaries have not changed.
If a child buys something on behalf of an adult, then the adult should record this purchase in his or her own diary.

We still need to collect information about all monetary transfers from adults to children.

b.   Monetary transfers to children

There are three main types of monetary transfers to children that might appear in the adult diaries.

These are:

      i.   pocket money;

      ii.   money given for a stated purpose, such as for travel or dinner money;

      iii.   gifts, presents, and other money given to a child not specified as pocket money nor for a particular purpose.

If the third type of transfer, money to child not specified as pocket money nor for a particular purpose, is recorded, probe whether this was for a particular purpose, pocket money or just a one-off payment to the child. Accept the respondent's definition of pocket money.

For all these three transfers, the adult should record the name of the child next to the diary entry. It is therefore important that entries like pocket money are split so that we know the amount given to each child.

Please check that the name of the child is given and **write in a "D"** next to the entry in the adult diary if the child receiving the money is keeping a diary.

The child will record what they spend with this money in their own diaries. If the money was given for a specified purpose, the child should record what he or she <u>actually</u> spent the money on.

5.   Other rules

a.   Change in expenditure patterns

We are concerned that children may alter their spending behaviour, either because they are completing expenditure diaries or because they are going to receive an incentive payment. We would therefore like you to assess the reliability of each youth diary. If you feel that the child has under- or over-reported expenditure, circle the number 1 in the interviewer code box on the back of the diary and write an explanatory note underneath.

Please **do not** circle the box **without** making a note as your reasons may not be clear to Titchfield coders. We will decide at the editing stage whether to use the information in the diary.

b.   Empty youth diaries

The procedure for empty diaries is the same for youth diaries as for adult ones, in that they must be returned to the office. It is quite possible that you will have children, usually the younger ones, who have no expenditure over the two week period. Remember to emphasise that we are interested in non-spending as well as the things that children actually buy.

c.   Pocket diaries

You may want to leave some children a pocket diary to help them record items while they are away from home. As for adults you (or they) will need to transfer the information into the youth diary later.

d.   Public Relations

Interviewers have suggested that it is a good idea to give youth diaries and pens to those children too young to take part in the test to prevent them feeling left out.

6.   Administration

a.   E forms

The E2 form covers payments to children as well as adults. Firstly, there is a space for you to record separately the numbers of adults and children in the household. Next to the name please enter the amount which is to be paid: £10 for an adult or £5 for a child.

Please be sure to check whether an uncrossed postal order or a payable order is required for children. If there is any doubt about whether a diary keeper has a bank account, tick the box to indicate that an <u>uncrossed postal order</u> should be sent.
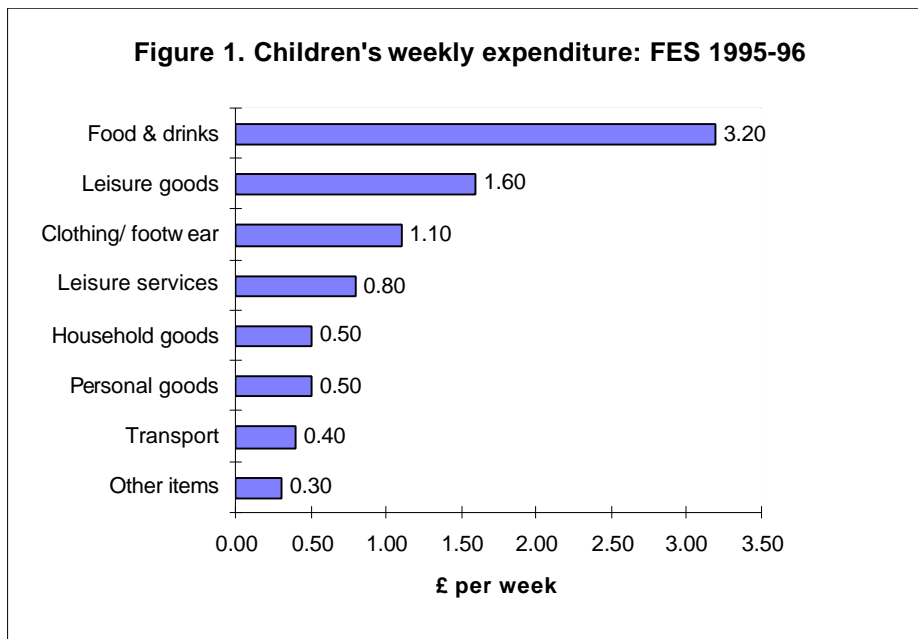
b.   Return of work

Please return the Youth Diaries together with the adult diaries for the household. The despatch note has been amended so that there is space for you to record how many completed youth diaries you have sent.

7.   Results from children's diaries

The results shown here are based on analysis of data collected in the 1995-96 FES.

a.   Children aged 7 to 15 years spent an average of £8.40 per week in 1995-6. The greatest expenditure was on food and soft drinks (£3.20 per week) and 93% of children had bought one or more items of food or drink. After this came expenditure on leisure goods (£1.60), including toys, books, magazines, CDs and sports goods, followed by clothing and footwear (£1.10).

Figure 1. Children's weekly expenditure: FES 1995-96

| Category	£ per week
Food & drinks	3.20
Leisure goods	1.60
Clothing/ footwear	1.10
Leisure services	0.80
Household goods	0.50
Personal goods	0.50
Transport	0.40
Other items	0.30

b.   As would be expected, spending increased quite steeply through the age range. Average expenditure for 15 year olds was £16.80 per week, almost four times as much as was spent by 7 and 8 year olds (£3.80 per week.

Figure 2. Weekly expenditure by age group
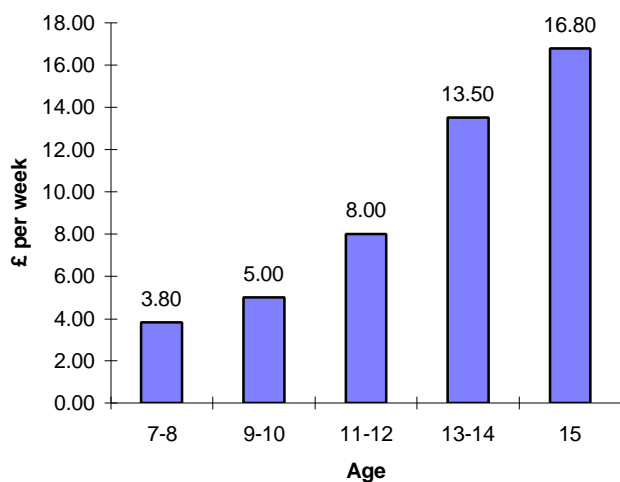
c.   The type of goods bought varied by sex and, to a lesser extent, by age although spending on food and drinks was the largest category for both boys and girls and for all age groups.

Girls spent twice as much as boys on clothing and footwear (£1.50 compared with £0.70) and more on personal goods, such as toiletries and jewellery, (£0.80 compared with £0.20). Boys, on the other hand, spent more than girls on leisure goods, including magazines, CDs and sports goods, (£2.10 compared with £1.10). Total weekly spending by boys and girls was broadly similar (£8.40 to £8.50).

Figure 3. Spending by boys and girls
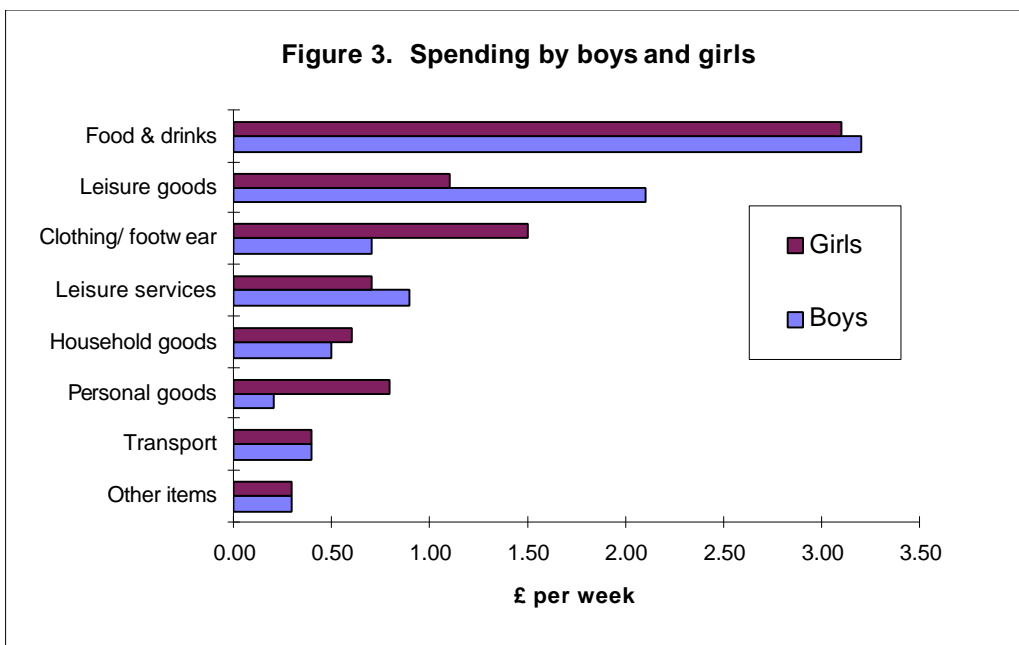
Category	Examples
Food and drinks	all foods; sweets; ice cream; soft drinks; take-aways; school meals; other meals eaten outside the home.
Leisure goods	books; magazines; comics; stationery; cards; toys; CDs; sports goods; computer games; photo equipment.
Clothing and footwear	all clothes; all footwear; clothing accessories.
Leisure services	charges for sports; admission charges; cinemas; spectator sports.
Household goods	fancy/ decorative goods; pets; batteries.
Personal goods	toiletries; hair products; cosmetics; jewellery; watches; leather goods.
Transport	school fares; other fares; cycle parts
Other	stamps; subscriptions; alcohol; tobacco.