



STATISTICAL OFFICE OF ESTONIA

---

# HOUSEHOLD INCOME AND EXPENDITURES SURVEY

## GUIDELINES FOR THE INTERVIEWER

- Household budget survey is part of a country's statistics aimed at investigating the income and consumption of families living in Estonia

Household budget survey serves as a basis for calculating the living standard, cost-of-living index and poverty line

- Household budget survey consists of four parts:
  - household interview/interview changes
  - income, taxes and expenditure booklet
  - food expenditure booklet

## **CONTENTS:**

### **I. GUIDELINES FOR THE HOUSEHOLD INTERVIEW**

· DETERMINING THE HOUSEHOLD AND CONTACT PERSON	3
· CODING INSTRUCTIONS FOR THE HOUSEHOLD INTERVIEW	3
General data of the household	3
Personal data of the household	4
Economic situation of the household	8

### **II. GUIDELINES FOR MAKING ENTRIES IN THE INCOME, TAXES AND EXPENDITURE BOOKLET**

· INCOME OF THE HOUSEHOLD	10
Monetary income	10
Services or goods obtained free of charge	10
Transactions in kind	11
· TAXES AND PAYMENTS	11
· EXPENDITURE ON GOODS AND SERVICES, ALLOCATING MONEY	12
Expenditure on consumer goods and services	12
Expenditure on renovation and construction activities	12
Expenditure on household economic and production activities	12
Allocating money and other expenditures	12

### **III. MAKING ENTRIES IN THE FOOD EXPENDITURE BOOKLET**

· EATING OUT	13
· BUYING FOOD	13
· FOOD EXPENDITURE ON PETS	14
· OWN PRODUCED FOOD, FOOD ACQUIRED FREE OF CHARGE OR PROVIDED TO OTHERS FREE OF CHARGE	14

## DETERMINING THE HOUSEHOLD AND CONTACT PERSON

The interviewer will receive the name and the address of the sampled **address person** from the co-ordinator. The interviewer will introduce himself, briefly describe the content and objectives of the survey as well as the importance of participating in it.

Further, the interviewer will determine whether the said person lives at the address given. If yes, the next step will be to delimit the household to be surveyed. **A household is a group of people living at the same address and sharing joint monetary resources whose members attest themselves to be members of one household.** Those people who live at the same address but are not tied to the everyday income and expenditure of the household (eg a tenant, another household sharing the flat) will not participate in the survey. Neither will household members living separately (eg a separately living household of an adult child, a child living separately due to studies (more than 1 year) – they are already an independent household) be considered as members of a household.

If the address person lives at the given address and is connected with the household living at this address (eg through household or economic relationship) then the entry "**sample household**" will be made in the corresponding column of the **interviewer report**. If the address person does not live at the given address, the household living there will be questioned and the entry "**substitute household**" will be made in the interviewer report.

If a household has been determined the interviewer has to find a **head of household** who need not be the address person.

After determining the household and the head of household the interviewer will introduce the content and objectives of the survey, the obligations of the household, the course of the survey and the length of participation. You may have to stress again that the survey is anonymous and nobody except the surveyors will see the data provided and can use them as single instance.

If a household refuses to participate one has to try to convince them by explaining that "it will not take much time", etc. In case of refusal try still to fill in the household interview booklet. If the household still refuses it will be recorded in the **report** and the co-ordinator will be informed about it.

## CODING INSTRUCTIONS FOR THE HOUSEHOLD INTERVIEW

The household interview will be carried out as a direct interview during the first visit to the household. If a household re-occurs in a sample then the household interview will only be specified as to the changes (cf household interview (changes)).

**Household code:** A number of the household received from the co-ordinator

**Area:** Code of the region a household lives in (to be filled by the co-ordinator)

**Number of interviewer certificate:** Write down the number of your certificate.

**Date:** Date of fulfilling the household interview booklet.

### General data of the household:

**Number of household members living in the household:** read out the definition of a household (A household is a group of people living at the same address and sharing joint monetary resources whose members attest themselves to be members of one household) and ask them to determine who belong to their household (cf also 1). Then decide jointly who of the household members agrees to act as the contact person and explain his/her duties.

**Number of household members living outside the household:** member who live outside the household is member who lives in household but who actually belong to another household and may come in sample through this household (eg grandchildren during the holiday etc).

**Type of settlement:**

1. city
2. town
3. settlement
4. a bigger village (having a school, shop or post office)
5. village, a detached farm

**Household language:** (the main language of communication of the household)

1. Estonian
2. Russian
3. other

**Language of questionnaire:** (What language the household would like to fill the questionnaire in?)

1. Estonian
2. Russian

### **Personal data of the members of the household:**

*Information is asked about all the people considered as household members by the contact person and about people living separately during the survey period due to studies or employment but economically dependent on the household. If the contact person has answered that there are five members of the household and a financially supported child lives in another town then the table should contain information about 5 members of the household and about a household member living separately.*

**B. Relationship to the head of household:** (In what way is the person related to the head of household).

1. spouse, partner for life
2. son, daughter (also a son or daughter of the spouse), also a stepchild or adopted child
3. brother, sister (also spouse's brother/sister)
4. mother, father (also stepmother or stepfather)
5. mother or father of the spouse or partner (also step-parents of the spouse/partner)
6. son-in-law, daughter-in-law
7. grandfather, grandmother (also step-grandparents)
8. grandchild
9. other relative
10. other non-relative

**C. Lives in the household:**

1. yes
2. no

\* a household member is considered living in the household even when he/she will be away from the household less than the survey period (eg on a business trip, in a summer cottage, etc); that person will enter his/her main income and expenditure in the same booklet.

\* a household member is not considered living in the household when he/she may be included in the survey as an independent address person and form a separate household.

**G. Sex:**

1. male
2. female

**H. Nationality**

1. Estonian
2. Russian
3. Ukrainian
4. Byelorussian
5. Jew
6. Finn
7. other

**I. Education:** (the highest education level of every household member older than 7 years)

#### **(1) PERSONAL DATA OF HOUSEHOLD MEMBERS**

The question concerning education has been further divided into two in order to better correspond to the Estonian Classification of Educational Programmes and ISCED. The new way of formulating the question will also be of assistance to the interviewer for coding the occupation in the table of household members. Knowing the educational level more precisely is most of all necessary for being able to distinguish clearly the main occupational group 2 "Professionals" from the next main occupational group 3 "Technicians and associate professionals".

#### **I 1. General educational level**

— under 7-year-old children

**0** — no primary education: A person with **no primary education** is a person who does not have primary education, i.e. he/she has not finished primary school with a leaving certificate.

**1 — primary education: Primary education** — indicated for persons who have finished primary school, or have finished in 1972 or later three grades; in any year four to six grades; in 1962 and later seven grades. Primary education will also be indicated for persons who had dropped out in academic year 1972/73 and later from the 4<sup>th</sup> grade, in any year from the 5<sup>th</sup> to 7<sup>th</sup> grade and in the academic year 1962/63 and later from the 8<sup>th</sup> grade. For persons who dropped out from the 5<sup>th</sup> to 7<sup>th</sup> grade in the academic year 1989/90, also “primary education” will be indicated.

**2 — basic education: Basic school graduates — basic education — education at the first level** — will be indicated for persons, who had finished seven grades in 1961 or earlier, or eight grades in year 1990 or later, also for persons who had left school before finishing the secondary school with the duration required in that year. “Basic education” will also be indicated for those who dropped out of the 8<sup>th</sup> to 10<sup>th</sup>, 9<sup>th</sup> to 11<sup>th</sup> and 10<sup>th</sup> to 12<sup>th</sup> grades of the secondary school with the duration required in that year. For graduates of vocational schools who had acquired secondary education together with profession or who had acquired profession on the basis of secondary education, “general secondary profession” will be indicated, whereas for others — education which they had before entering that educational institution.

**3 — secondary general education: Graduates of secondary school, gymnasium — secondary education, second-stage education** will be indicated for persons, who have finished an 11-year or 10-year school; secondary school, gymnasium, secondary scientific school, commercial school, second-level category school or some other secondary school of general education and for those graduates of secondary vocational schools, who acquired general secondary education, receiving the respective leaving certificate.

## **I 2. Vocational and professional educational level**

**1 — vocational/technical school education: Graduate of vocational school — vocational education at the second level** will be indicated for persons, who have graduated from a vocational secondary school or other vocational school, industrial school, vocational school of a branch of industry, factory-and-workshop school, technical school, or from a secondary school with a trade license

**2 — secondary specialized/ technical/ school education: Secondary specialized education** will be indicated for persons, who have graduated from a technical secondary school or other secondary specialized school (teacher training college, pedagogical school, choreographic school, music school, art school) or a vocational educational institution on a secondary specialized level.

**3 — diploma higher education as from 1995.**

**4 — higher education diploma until 1995/bachelor: Higher education (incl. diploma higher education)** will be indicated for persons, who have graduated from a higher educational institution (institute, academy, university, professional higher school, except university of Marxism-Leninism and adult education courses).

**5 — master. Master’s degree** will be indicated for persons who have finished the master’s course.

**6 — doctor/candidate of sciences. Doctor’s degree** will be indicated for persons, who have passed doctor’s examination or who have finished an equivalent course of some foreign country.

99. *does not know, refuses to answer*

**J. Work ability (ask about household members over 16)**

0. under 16 and over 60
1. able to work
2. temporary loss of work ability (short-term illness, eg influenza)
3. longer-term loss of work ability (a long-term illness lasting at least a month, eg podagra)
4. disability benefit

The following questions (**relationship to work; sphere of activities; form of ownership of an enterprise; social group**) are concerned with the social status of the person considered. Answering them is more complicated due to the fact that people can have several job/or have several different social statuses (eg farmer - pensioner, academician - company owner, cleaning person - student). In such cases it is important for the person himself to determine which employment or status is the **most important** for him. Usually the decision is based on the biggest income from an employment or most time spent on it; education, former career or life cycle may also be important. Please note that the questions "sphere of activities" and "form of ownership" should be answered departing from the same (most important) employment.

**K. Relationship to work:**

**(Do you do any work at the moment, eg as salaried worker, businessman or freelancer for which you get monetary remuneration?)** In case of salaried worker please specify whether they work more or less than 10 hours per week.

If a person has any problems in determining his relationship to work (eg a retired person who runs his own farm and earns some income) then explain that farmers, businessmen and individual workers are considered employed, as well as adult members of household working in a household enterprise or farm who get no salary but get part of the profit and of other possible income which exceeds the amount of their pension, child care benefit or unemployment benefit.

1. yes, works more than 10 hours (or more than a quarter of full-time) a week
2. works less than 10 hours per week
3. temporarily not working (work relationship holds, ill, on maternity leave, taking care of a small child, unpaid leave)
4. work relationship terminated; unemployed; looking for a job or changing a job
5. not working (not looking for a job, not registered as an unemployed; a student or retired person not working, etc.) -> *Do not forget to put down the 'social group' (column "N" in the personal data table)*

**L. Sphere of activities: (What does the enterprise or undertaking you work for mainly do?).** It will be asked of people whose answers were 1,2 or 3 ("temporarily not working"). If a person has several workplaces then fill in according to the employment he/she considers to be most important. Code according to ERTAK:

0. Unemployed person
01. Agriculture, hunting and forestry
02. Fishing industry
03. Mining industry
04. Industry
05. Energy, gas and water industry
06. Construction industry
07. Whole and retail trade, maintenance of motor vehicles, personal belongings and household equipment
08. Hotels and restaurants
09. Transportation, logistics and communications
10. Finance and insurance (exc. social insurance)
11. Real estate, renting and business services (also science)
12. State governing, state defence, social insurance, culture
13. Education
14. Health care and social welfare
15. Other types of public, social and personal services
16. Home services by employed people
17. Extraterritorial organisations and units

**M. Form of ownership of enterprise: (by the most important place of employment for the person - similar to the former question).** It will be asked of people who answered 1,2 or 3 to question "K". If a person has several places of employment the most important for him will be chosen.

0. unemployed person

1. state ownership
2. local municipal ownership
3. Estonian private ownership (incl. a farm)
4. foreign private ownership
5. other form of ownership

**N. Social group (according to the definition of the respondent):**

To be filled for each member of the household. In determining the social group the above answers should be considered (age, education, working/not working) and specified with the help of additional questions to the person (or contact person). If a person has several employments or is simultaneously eg a farmer - pensioner, an academician - company owner or a student - cleaning person then the person should be asked which employment or status is more important for him/her and the additional questions should address the chosen sphere.

- 1) First, does the person **work or not**; (do not forget that farmers, business people, freelancers and household members working in a household business without any salary (a farmer's household member doing farmwork, a spouse of a private shop owner working as a sales person, etc.) are considered working). If a person does not work then find out whether he/she is a student, a retired person, an unemployed, etc.  
In case of people not working the possible answer variants are 8-14.
- 2) Is the person a **salaried worker (1)** or **self-employed**.
- 3) In case of **self-employed person** please specify if the person is a farmer (2), individual work permit holder (3), owner of a business employing salaried workers (4-6) or a household member working without a salary (7). An owner is a person to whose name a farm, an enterprise or a company has been registered or who holds at least one third of its shares. Household members of an owner are not owners.
- 4) If any of these variants does not fit or a person is not ready to identify himself with any of the mentioned groups then write "**other**" (15) and ask the person which group not listed above he belongs to.

**Scale:**

1. salaried worker

**2-6. Business people:**

2. farmer
3. individual work permit holder, free-lancer, private practitioner
4. small businessman, owner of small business (up to five employees)
5. owner of a medium-size enterprise or company (5-19 employees)
6. owner of a bigger enterprise or company (20 or more employees)
7. household member working without a salary in a farm, household business or enterprise

**8-14. Not working:**

8. a pupil
9. a student
10. in military service
11. an unemployed (a household member over 16 who has no work relationship and has been registered as unemployed and/or looking for a job)
12. a domestic person, dependant (a person over 16 not working and studying who is not unemployed and not looking for a job)
13. a domestic minor (not a pupil)
14. a retired person
15. other who \_\_\_\_\_

**O. Profession (according to ISCO-88):** To be coded according to the international classification:

0. a person not working
1. legislators, executives and senior managers
2. top experts
3. technical staff and medium level specialists
4. clerks
5. service people, sales people in shops and markets
6. skilled workers in agriculture, forest and fishing industry
7. other skilled and manual labourers
8. workers operating semi-automatic and automatic mechanical tools and equipment (machine operators, operators, assembly line workers), drivers

9. unskilled labourers
10. military service

### **Economic situation of the household:**

*The purpose of this part of the interview is to gather background information about the economic situation and material possibilities of the families participating in the survey*

**1. Type of dwelling:** Write down the type of dwelling and number of floors. Any hall of residence (even if only two families live there) is a hall of residence (not a semi-detached house). Write down the number of floors without the cellar. The attic is considered a separate floor if it has been finished and is in fact being lived in.

**2. Ownership of the dwelling:** It is important to specify whether the dwelling of the household is owned by the household themselves, by state or by local municipal government, by an enterprise or undertaking, by a flatowners society (former co-operative flats), by a private person the household pays rent to, or by an acquaintance or relative with whom there is no rent relationship.

**3. Number of rooms:** Write down the number of rooms at the disposal of the household. For example, if a household uses 2 rooms of a 5-room flat and the other household uses 3 rooms then write "2". If some rooms (living room, drawing room) are shared these will be included in the overall number of rooms used by a household. In the above case, if a room is shared then the surveyed household has 3 rooms and the other 3 rooms as well.

**4. Availability of modern conveniences:** the scale includes all modern conveniences, some conveniences and no conveniences. Let the household themselves determine which ones they have.

**5. Other buildings:** does the household possess in addition to their dwelling other (eg production) buildings (an answer per line).

**6. Monthly income:** What is the **average** monthly income of the household which it can use in reality. Add up all income received by the household members over the last month (salary, bonuses, child benefit, pension, etc.). The aim is to assess the order of magnitude of income a household must consider. If the figure differs considerably from that of the earlier months (ie is considerably smaller or greater) then the estimated average income of previous months is entered.

**7. Assessing the sufficiency of income:** The subjective opinion of the household about the sufficiency of the income for satisfying the household needs is inquired.

**8. Securities/ savings and deposits:** does a household, in addition to usual income, have any possessions invested in savings and deposits (an answer per line). Shares also include securities.

**9. Services and goods obtained free of charge or at reduced price:** has the household received goods or services free of charge or at a reduced price from the list provided. A considerably reduced price means at least a 25% reduction.

**10. Using land:** Whether the household or any of its members uses land for the needs of the household or for production.

**11. Type and ownership of land:** if yes, then specify which type of land is used. One answer per line. Does the household own any landed property? A household or its member are considered land-owners if that landed property has been entered in the register of village land. In many cases an application to reclaim land has been submitted but has not yet been solved. Then make a record in column "2".

**12. Food free of charge:** if and from where a household has acquired food for which it has not paid directly.

**13.** The other, specifying question is asked if any questions of the preceding block were answered in the positive. The criteria of measurement are whether the amount covers a household's needs or is there a surplus (eg for sale) or a deficit (some food items must be purchased in addition).

**14. Do-it-yourself/services obtained free of charge:** what kind of everyday chores a household can do themselves, what services they are compelled (and ready) to pay money for. If a question cannot be answered (eg a household has no children or a car) complete column "4" (impossible to answer).

**15. Buying new durable goods:** The objective here is to estimate the "free resources" of a household (will money be left over from everyday expenditure) or whether it is possible to save some money. The respondent should answer even if he/she really does not need that item. Tell the respondent also the approximate price of the item (indicated in brackets), also the amount of short-term or long-term instalments when necessary.



**16. Existence of durable goods:** A list of durable goods is provided. Tick every item (1,2,3 or 4, respectively). Circle the appropriate answer. If yes, then how many (enter the answer in last column).

**17. Desired income:** Ask the household how big their average monthly income should be in order to live normally, without any luxury.

***When the household interview is completed,** the interviewer will introduce the household budget booklets and explain how to make records in them. Together with the contact person the interviewer will complete the household table at the beginning of the booklet **Income** by recording the numbers and names of the household members living separately during the survey period as specified already in the interview. Instead of proper names nicknames can be used if wished so.*

## GUIDELINES FOR MAKING RECORDS IN THE INCOME, PAYMENTS AND EXPENDITURE BOOKLET OF A HOUSEHOLD

It is important to start the "Income, payments and expenditure" booklet by filling in the table of the members of the household together with the contact person. That is, departing from the "Household interview" the numbers and names of the household members should be recorded as it would be necessary, for example, to specify who in the household received income. Check that there are the start and end dates in the first page of the booklet.

### HOUSEHOLD INCOME

There are three tables "Monetary income", "Goods and services get free of charge or at a cheaper price" and "Transactions in kind" in the booklet for recording the **income of a household**. Explain to the contact person that when it is not clear what to call some kind of income he can refer to the list of types of income at the end of this part.

#### I. Monetary income

Enter the monetary income of the household during a month in this table (eg *salary in cash, bonus, payments for leave periods, sick leave compensation, income from entrepreneurship, sale of horticultural products, money for odd jobs, unemployment assistance, scholarships, alimony, maternity leave benefit, child care benefit, poverty allowance, dividends, income from leasing a car, flat or other property, sale of personal possessions, monetary support received from, borrowing money, receiving loans, etc.*). Stress that income should be recorded as exactly as possible. It is also important to record all the income (even small amounts which may seem irrelevant). In case any member of the household received income in foreign currency ask them to convert it into EEK.

For every item of income it is important to show which member of the household received it. Use the column number of household member for that purpose and write down the code of the corresponding member (cf the household table). If more than one person received this income (eg in case of child benefit) then write eg. 3, 4 and 5, respectively. In case it is difficult to specify one person having received the income, eg. when the household received poverty allowance, got income from selling property, etc., then write "0" in the table.

There are two columns for determining the amount of income: the first one for income received by household members in cash, the second one for income transferred to a household member's bank account (child benefit, pension, dividends, for example). **Ask the household members to check the income transferred to their bank accounts at the end of the month and then enter them in the booklet.**

Both columns (ie "received in cash" and "transferred to bank account") should contain the amount of money without the personal income tax.

Most families have surely been in a situation when they had to borrow money, use their savings, et. This money cannot be directly called "income". From the survey's point of view it is important to know how much money a household can actually use. Therefore write down also the money which has not been received as direct income but, for example, has been withdrawn from a bank account.

**II. table "Which of the following services or goods can be acquired by your household free of charge?"**

Answers to this question should be recorded in the income table and also the approximate value should be recorded there. See that the monetary values of services or goods are recorded.

#### III. Transactions in kind

Not always do the households receive income in cash for work performed. For example, some families have the possibility of receiving dairy products instead of money for milk, products manufactured in the

enterprise one works instead of salary in cash, or sometimes a work done to an acquaintance can be remunerated by a service.

Please record in the following table which products, goods or services your household has received in payment for work performed during this month.

It is important for the survey for what the payment was received. Please circle the appropriate variant number.

- Payment for salaried work is income which is received instead of salary in cash from the enterprise or undertaking where one works.
- As payment from private entrepreneurship are considered all the things, goods and services received for work one does as a farmer, a self-employed person, a non-salaried chance labourer, etc.
- Helping others means private work done for others (eg cultivating land, baby-sitting, sewing, etc.).
- Presents.
- If the work done does not fit in any of the above-mentioned categories circle number 5 ("other").

In the last column please enter the approximate value of the goods received or services rendered (don't forget this).

## TAXES AND PAYMENTS

Please enter all the taxes and payments made by the household during the observation period in the following table. There is a list of all the major taxes and payments people usually make. The household has to find a suitable entry line for recording their actual expenditure. If the respondent cannot decide which entry line corresponds to the expenditure enter it at the bottom of the table on line called "other taxes and payments". It is important to differentiate whether the corresponding sum has been paid by the person himself (from his own pocket) or it has been withheld from his income (eg personal income tax and rent). If you have paid the corresponding sum yourself (from your own pocket) then enter the sum paid in the first or second column (in the appropriate column). When it has been withheld from your income (eg personal income tax and rent) enter the sum paid in the third column.

.

In case of the personal income tax please indicate which income the tax was withheld from (eg salary, income from self-employment, etc.) and the person (enter the number of household member).

With respect to dwelling-related expenses (rent, municipal services, etc.) please enter the different kinds of payments in the corresponding lines of the table as exactly as possible in free form. This is necessary as different owners use different payments and in various combinations (eg sometimes heating and hot water are considered separately, sometimes together) and the list of payments may cause difficulties. Recommend the respondent to rewrite the items from his/her rent slip and on other related slips (electricity, natural gas, telephone) into the table.

It might happen that in case of some regular and recurring payments (personal income tax, membership fees, etc.) there will not be enough blank lines for the corresponding payment. In that case ask the respondent to register these payments in the column "other payments".

## **EXPENDITURE ON GOODS AND SERVICES, ALLOCATING MONEY**

The expenditure of a household not connected with food and foodstuff shall be recorded in four tables of the consumer goods and services booklet. Table I is for recording expenditure on consumer goods and services, Table II is for expenditure on construction and renovation activities (building materials, labour, etc.), the third table is for expenditure made in connection with a household's production activities, the fourth table is meant for the expenditure not related to goods and payments (depositing money in a saving's bank, buying securities, lending money, etc.).

### **A. Expenditure on consumer goods and services**

The expenditure of the household on consumer goods and services should be recorded in this table. As in the other tables, one should record as exactly as possible the items or services purchased, their price, the number of the household member for whom the goods or services were meant. If the goods were intended for the whole household then enter "0" in the column "to whom". If they were meant for somebody else not belonging to the household then write "99".

### **B. Expenditure on renovation and building activities**

This table is intended for recording the expenditure of the household on renovation and building activities (building and elaboration materials, tools, labour, various related services, etc.). The exact name of the item, in case of goods their amount and unit of measurement, the price of the goods or services, their purpose should be written in this table. It is important to differentiate whether the expenditure is related to 1 renovation of the dwelling; 2 construction of a flat/house; 3 renovation of the household economic or production activity buildings; 4 construction of the household economic or production activity buildings. Please circle the appropriate answer variant.

### **C. Expenditure related to the household economic and production activities**

Table C is meant for recording expenditure which are directly related to the household or production activities of the household (livestock farming, cultivating land, setting up a company, renting production buildings, etc.). The purpose is not to analyse all the expenditure of production activities but only those made of the joint purse of the household (the so-called expenditure of a physical person). If a household has its own company or farm registered as a legal person and possessing its own book-keeping then these expenditures on production activities will not be recorded in the booklet.

The exact item of expenditure, price of the goods or services and whether the expenditure made is related to the household economic or production activities should be recorded in the table (circle the appropriate answer variant). The household economic activities are activities whose produce is first and foremost directed at satisfying the needs of the household (eg kitchen plot, hobby farm) whereas all the production activities are directed at earning income (produce intended mainly for sale).

Point out that the expenditure related to construction and renovation activities in this area should be recorded in the table for renovation and construction expenditure.

### **D. Allocating money and other expenditure in kind**

Record the expenditure of the household related to allocating money and transactions in kind in this table. Allocating money means taking savings to a (savings) bank, buying various securities (shares, bonds), lending money, making a gift of money, taking items out of pawn and other "expenditure". If a household have expenditure connected with paying back a loan (from an acquaintance, from another person) by its member then ask them to record it in this table. Paying back bank loans or regular loan interests should be recorded in the corresponding column of the payments booklet. Please stress that any expenditure be recorded only once.

## **GUIDELINES FOR MAKING ENTRIES IN THE FOOD EXPENDITURE BOOKLET**

The household food expenditure booklet is meant for recording the expenditure on food by a household. It consists of four tables:

1. A table for eating out expenditure
2. A table for food items bought for the household and others
3. A table for food expenditure on pets
4. A table for food items produced and cooked by the household or acquired from others

free of charge

The household has to record the food expenditure for half a month. The co-ordinator has already put down the code of the household and the area as well as the number of the interviewer licence on the front cover of the booklet. You have to add the dates of filling the booklet.

Stress that all the food bought by the household, received from others and the so-called free of charge food should be recorded in the booklet. Even expenditure which might seem irrelevant and unimportant for the household should be registered. Every item of expenditure, also food received or handed out free of charge is important for the present survey's point of view.

## EATING OUT

If someone from your household ate out and paid for the meal himself then please record it briefly in the first table. In addition to "ordinary meals" in canteens, snack-bars, restaurants, etc. register here also the money for children school lunch.

There are four columns in the table: place of eating, "kind" of meal and alcohol, total cost of a meal and a separate column for expenditure on alcohol.

Places of eating may be, for example, a kiosk, a snack-bar, a bar, a restaurant, a school canteen, etc.

In the column "items consumed" give a brief description of the "kind of meal" (fruit, ice-cream, pizza, broth, main course, dessert). It is not important for the present survey whether the main course was beef or cutlet, etc. A difference is made during coding between a snack, a light meal and a single or multi-course warm meal. Therefore, it is not necessary to list any extras (eg bread, vegetable salad, milk, etc.). This column should also include consumed alcohol (beer, vodka, cocktail, brandy) in such a way which makes it possible to differentiate light and strong alcoholic drinks and alcoholic cocktails.

In column "sum total" write the total sum for the meal (including alcohol). Ask the respondent to get a written bill and keep it until the expenditure has been entered the booklet.

Register only the expenditure on alcohol in the last column ("incl. alcohol").

## BUYING FOOD

Please record in this table all the items of food bought by your household daily, except the items you buy at somebody's request for him/her and which are either prepaid or will be paid at a later date (eg if a friend asked you to buy something and paid you later for it then do not record this expenditure).

For each item, write in the corresponding column of the table its description, amount bought and unit of measurement (gram, kilo, piece, litre, etc.), the cost of the purchase and whether it was bought for the household, a member of the household living separately or a person not belonging to the household.

- Try to be as exact as possible when registering the **kind of food**. Explain the household that it is necessary to differentiate between boiled and smoked sausages, vegetable preserves with and without meat, toffees and chocolate candies, etc.
- **The amount of food** should be registered in units of measure (gram, kilo). In most cases it is indicated in the package (bottle, can). **Therefore recommend that not a package of coffee, a bottle of ketchup or 2 sausages be written down but, for example, 400 grams, 250 grams or 65 grams.** Liquids (eg milk, cooking oil, beer, etc.) may be recorded in litres.
- In the column "**cost**" write the price of the goods in EEK and cents.

Record the **origin** of goods in a separate column. Check the packing properly as the origin is usually indicated there. In case of unpacked goods ask the sales person. If the person registering the goods can not answer this question write "7" in the table.

In column "**For whom**" the appropriate answer variant should be circled. For example, if someone bought something for the whole household please circle number "1", if it was for somebody not from your household please circle number "2"

Advise the household to keep all the receipts from shops and register the expenditure immediately after a purchase (or the same evening).

### FOOD EXPENDITURE ON PETS

Many households have cats or dogs, guinea pigs, parrots or fish. Ask the household if they have any pets as keeping pets may take a considerable part of all the expenditure on food. Enter all the **food** expenditure **especially** made for the pets in this table. Expenditure on keeping other domestic animals should not be recorded here but in the table "Expenditure on household activities" of the "Expenditure and consumption" booklet (if keeping animals is not meant for producing profit), or in the table "Expenditure on production activities" (if keeping animals is oriented towards making profit).

### OWN PRODUCED FOOD, FOOD ACQUIRED FREE OF CHARGE .

In addition to food bought in a shop every household consumes its own produced or cooked food or food acquired free of charge (eg potatoes and jam from one's cellar, vegetables grown in one's kitchen plot or milk and eggs produced by the household). Table IV is meant for recording the consumption of own produced food or food acquired free of charge.

Ask the contact person to make an approximate estimate of how much your household consumed their own made or free of charge acquired food during a week. As the observation period will last half a month then enter the data in the table twice: after the first and second week of observation.

In addition to food please write down its approximate amount, cost and whether it was acquired or own produced (circle the appropriate answer variant).