



**THE 2015 SURVEY OF LIVING CONDITIONS  
AND HOUSEHOLD BUDGETS**

**INTERVIEWER MANUAL**

**SAINT LUCIA**

**FINAL VERSION**

***Statistical Department  
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# ENUMERATORS MANUAL FOR THE SURVEY OF LIVING CONDITIONS AND HOUSEHOLD BUDGETS

## WHAT IS A SURVEY OF LIVING CONDITIONS AND HOUSEHOLD BUDGETS

It is a comprehensive survey which combines a survey of living conditions with a survey of household income and expenditure. It is a rich source of socio-economic information on the household population and is often regarded as an essential source of data for the determination of social needs and establishment of targets for development planning.

This survey has two main objectives; firstly, it is designed to collect information from the country's households and families on their buying habits (expenditures), income and other characteristics. Secondly, the survey allows data users to relate the expenditures and income of consumers to the characteristics of those same consumers.

This combined survey is also used for the purpose of revising the list of goods and services in the "basket" and consequently the weighting patterns of the CPI (Consumer price index). A change in the Consumer Price Index (CPI) is sometimes referred to as "the inflation rate" and is one of the key economic indicators. The "inflation rate" measures the changes in the purchasing power of money and is closely monitored by economic planners, policy makers, the business community and labour unions.

In addition, this survey provides:

1. Valuable data for an assessment of the impact of socio-economic policies on the conditions and levels of living of households.
2. Inputs for the compilation of national accounts of the household sector which is useful in the process of calculating the growth rate of the economy.
3. Statistics on the distribution of income and expenditure, this helps to determine the percentage of the wealth of St. Lucia which is owned by each income group.
4. Information on the poor, their characteristics, expenditure patterns when compared to other groups in the society.
5. Information on household consumption of various goods and services.
6. Information to assess the cost of provision of health services and the level of satisfaction of the population with its provision.
7. Information to assess the cost of the provision and expenditure on education and the level of satisfaction obtained.

## ROLE OF INTERVIEWERS

The spender is one of the central respondents to this survey. **A spender is defined as a person 18 – or 15 years of age and over or an employed person irrespective of age.** For this survey we are providing the sum of \$15.00 EC per person completing the household questionnaire and \$10 each per person completing the person questionnaire as an incentive for participation. This is an incentive we are providing to household members to express our gratitude for their willingness to participate in the survey. This is not a payment to the household for their effort in completing the survey. Household member's time is more valuable than any payment we can make to them and we recognize that.

You are expected to complete a detailed interview of the household and its members.

## MANUAL AND THE QUESTIONNAIRE

You must therefore know your manual and the tablet questionnaire thoroughly. Make sure to have all your doubts cleared during your training class. You should know the format of your questionnaires and the sequence of the questions on the tablet thoroughly. You should never appear to be fumbling or uncertain about the meaning of a particular question during an interview.

The questionnaires will be administered to each household using the tablet computer on which the questionnaire is loaded; each household will be visited at least once depending on the availability of persons and size of household. If it is possible to complete the interview on the first visit make every attempt to do so. However, given the length of the questionnaire and the availability of persons to complete it, it may be necessary to return to the household to complete the interview. If that needs to be done please make an appointment and return to the household to complete the questionnaire at an appropriate time.

## SECRECY AND CONFIDENTIALITY

Please remember that the answers to some of the questions being asked may be regarded by some of the householders as personal and private. In such instances you must indicate that you are working under an oath of secrecy and that it is illegal under the Statistics Act Chapter 17.12, Vol 19 of 2001 for you or anyone working on this survey to divulge any information collected, to unauthorized persons. Reassure the respondents that the information collected will be treated with the strictest confidence.

## REFUSALS

Occasionally, you may come across respondents who may refuse to cooperate with you in the completion of the survey questionnaires. In such instances you should not be disheartened by the respondent's reluctance, instead, you should politely try to persuade the respondent to give the information by stressing the importance of the survey, by repeating the objectives and the confidentiality of the survey. If the respondent persists, do not press them unduly or enter into an argument, but thank them politely and leave. You should report the refusal to your supervisor as soon as possible.

## **MANNER, APPROACH AND DRESS**

As mentioned earlier, you will be interviewing persons who may be reluctant to supply you with information. Therefore, it is important that you do not offend them by your manner, approach and/or dress. You should always be dressed in a presentable manner, and should have the appearance of a responsible officer. In some situations you may need to make an appointment to meet extremely busy persons. Ensure that you keep all appointments.

## **HOW THE INTERVIEW SHOULD BE CONDUCTED**

A very important part of your interview takes place within the first few minutes. You must do everything possible to win their trust, confidence and co-operation. Try not to offend them; always be courteous by:

- i) Bidding a good day
- ii) Asking permission to enter
- iii) Closing the gate after you, particularly if you had found it closed.
- iv) Sitting only when invited to do so
- v) Wiping your feet on the mat if there is one

All these help to create a favourable impression, which invariably leads to a more responsive attitude on the part of the respondents. Always be patient and tolerant. During the course of the interview, the respondent may for some reason become hostile and intolerant. It is your responsibility to exhibit patience and tact. On no account should you respond or retaliate by getting angry. You should be tolerant even in the face of continuing unfriendliness. If the situation looks as if it is getting out of hand, then you should leave politely not abruptly.

Avoid interviewing before a group other than the respondent's immediate family. If the respondent is a part of a group, then explain the purpose of your visit, the confidential nature of the information and ask if you could conduct the interview privately.

Be considerate with regards to the timing of your visit. If you find that you have visited at meal time, you may apologize and enquire if you may wait for 10-15 minutes until they have finished their meal or ask when is the appropriate time to visit before going on to the next dwelling to return later.

Select a responsible person to interview. This person should be the head of the household or the partner whenever possible. Remember that you are trying to obtain information regarding the household expenditure and therefore make sure the respondent can supply the required information.

## **HOW TO RECORD ANSWERS**

**The answer is recorded by selecting the appropriate response provided on the Tablet.**

**The “other” response:** For a set of questions, there is a category for “other (specify)”. You will use this category only when the response given does not fit into any of the pre-coded answers listed.

## **INTRODUCTION**

Begin your conversation like this; "Good morning (afternoon/evening) Sir/Madam" I am an officer from the Central Statistics Office of St. Lucia, here is my identification card. The Office is conducting a Survey of Living Conditions and Household Budgets and you have been selected for inclusion in the survey. I would therefore be grateful if you would answer some questions.

Once inside the house it is a good idea to repeat the explanation given at the doorstep as many people only half listen to what is said initially; with their thoughts still on whatever that was happening when you called. Expand upon the topic of the survey, and the confidentiality of the information gathered to an extent that will satisfy the informant. You should always do this however cooperative the respondent is, so that he/she has no misconception about/regarding where you are from.

Also indicate to the respondent that an incentive of \$15 EC will be provided to the person completing the household questionnaire and \$10 EC each for person's completing the person questionnaire as an expression of our gratitude for participation in the survey. The incentive will be provided upon completion of the questionnaire by the respective person.

## **FLEXIBILITY**

The above may seem to suggest that you adopt a highly stereotype approach, but this is not so. You will need to be very flexible in your choice of words, length of explanation, repetition of what you have already said as you are bound to meet old people, young people and professional people. Sometimes, it may be necessary to indulge in some small talk, just to put the respondent at ease. You should never involve yourself in political, religious, and or other sensitive issues and you should always try to be neutral, regardless of what your personal/political affiliations are.

## **FINALISATION OF INTERVIEW**

After the last question has been completed look over the entries you have made on the tablet to ensure that you have not missed any and then thank the respondent for his co-operation. Be just as polite on departure as on arrival. Say goodbye and remember if there is a gate, close it after you, unless it is obvious that it is usually kept open.

## **DEFINITIONS AND CONCEPTS**

**Household:** This will be the basic unit of enumeration. For the purpose of this survey, a household may be defined as:

- **A Single Member Household:** That is, a person who lives alone and makes provision for his or her own food and other essentials.
- **A Multi-Member Household:** This is defined as two or more persons who combine to provide themselves with food and other essentials for living. These persons may be related or unrelated and the household may include boarders (a person sharing the housing unit and meals against payment) and servants who share food or other essentials. However, if the number of boarders exceed five then the household should be considered as an institutional unit and therefore not be included for the survey. In such cases the interviewer should inform the supervisor who will then assign a substitute household for investigation.
- **A Lodger:** Is a person who occupies a separate room or rooms in the housing unit and does not share meals with the host household. For purposes of this survey lodgers should be excluded from the list of members of the household.
- **Housing Unit:** Is defined as a structurally separate and independent place of abode. It should be noted that the occupants of a housing unit do not automatically constitute a single household and it follows that there can be two or more households with the same housing unit.
- **Head of Household:** For survey purposes every household must have a head. The head of the household is the person, man or woman who carries the main responsibility in the affairs of the household or the person who the members of the household regards as head.
- **The spender** is one of the central respondents to this survey. **A spender is defined as a person 15 years of age and over or an employed person irrespective of age.**

In most cases the head of the household may be the principal breadwinner or a senior member of the household or group irrespective of his or her contribution and who is acknowledged as such by the other members of the household or group.

- **Employed - *at work*:** All persons 15 years of age and over, who did some work for pay or profit during the reference period.
- **Employed - *but not at work*:** All persons 15 years of age and over having worked at their jobs but were temporarily absent during the reference period due to illness or injury, labour dispute, bad weather etc.
- **Employed - *own account workers*:** Own account workers are self-employed persons who have no employees. These should be included among the employed irrespective of whether they were "at work" or "not at work".
- **Unpaid family workers:** A member assisting in a household enterprise should be considered as employed if he/she has worked for at least one third of the normal working hours that is 12 hours for a week (normal working time for a week is considered to be 35 hours).

- **Unemployed:** All persons 15 years of age and over who did not do any job or gainful work, but were available and looking for work during the reference period. Full time students as well as, persons mainly engaged in household work should not be included here.

**Quantity:** Very often quantity refers to the amount purchased for e.g. 3 loaves of bread or 2 tins of corned beef, 2 1/2 lbs of fish etc.

**Unit Of Quantity:** This refers to details regarding the size of the item purchased.

e.g.	1 Litre	Cola
	1 Kg	Sugar

340 grams or 198 grams in the case of corned beef tins. In this case unit of quantity is grams.

As far as possible give unit of quantity in metric units for example, grams, litres, metres etc.

**Price Per Unit:** This refers to the price of each item, example the price for a loaf of bread or tin of corned beef. The price per unit varies with the size of the loaf or the size of the tin.

### **Reference Periods Used:**

**Past/Last Seven Days Or Past/Last Week:** This refers to the last 7 days counting from the day before your visit.

**Past/Last Month:** This refers to the last 30 days counting from the day before the visit.

**Past/Last Three Months:** This refers to the last 90 days counting from the day before the visit.

**Past/Last Year:** This refers to the last 12 months counting from the last month e.g. If you visit in November 2015 past 12 months refers to November 2014 to October 2015. If you visit in January 2016 past year refers to January 2015 to December 2015.

**Purchased "P":** This refers to what members of the household have purchased either for themselves or for others.

**Gifts "G":** This refers to what members of the household have received from non-members of the household.

## **THE HOUSEHOLD EXPENDITURE SURVEY QUESTIONNAIRES**

There are two (2) questionnaires to be administered in the survey.

1. S.L.C.H.B Household Questionnaire
2. S.L.C.H.B Individual/Person Questionnaire

## THE STRUCTURE OF THE QUESTIONNAIRES

<b>HOUSEHOLD QUESTIONNAIRE</b>	Cover Page	Household Information – Cover Page, Capture GPS Coordinates, Enumeration District, Household Number, Telephone Number and Number of Persons
	Section 1	Housing Ownership of Household Assets
	Section 2(1) Part 1,2,3	Expenditure on accommodation Part 1 – Owner Occupied Accommodation Part 2 – Property Bought/Constructed In Survey Year Part 3 – Rented Accommodation
	Section 2 (2) Part 1, 2	Repair and Maintenance of Dwelling Part 1– Materials Excluding Labour Costs Part 2 – Labour Excluding Materials Cost
	Section 3 Part 1, 2, 3	Major types of Household Expenses Part 1 – Amount Spent on Utilities Part 2 – Monthly Amount Spent on Household Services Part 3 – Other Annual Households Services
	Section 4	Furniture, Furnishings and Household Equipment
	Section 5 (1)A	Food And Beverages
	Section 5 (1)B	Food Security
	Section 5 (2)	Other Non-Food Expenditure
	Section 5 (3)	Agriculture Products Produced And Consumed At Home
	Section 6	Transportation

**PERSON  
QUESTIONNAIRE**

Section 6 (2)	Vehicle Maintenance and Repair Expenditure
Section 7	Mortality, Personal Safety, Crime and Violence
Section 8	Social Behaviour and Exercise
Section 1	Characteristics – For all persons
Section 2	Health – For all persons
Section 3	Education – For all persons
Section 3A	Social Protection – For all persons
Section 4	Economic Activity
Section 5	Union Status and Fertility for persons – 15 years and Over
Section 6	Clothing Purchased/Received as Gifts
Section 7	Footwear – Shoes and Other Footwear
Section 8	Other Expenses
Section 9	Other Disbursements
Section 10	Income

# **HOUSEHOLD QUESTIONNAIRE**

## **COVER PAGE**

Complete all items of information required for the proper Identification of the household. On your tablets the data on the household to be interviewed will be preloaded. This includes information relating to the Sub-sample, Enumeration District and household number. This information will be loaded on your assigned questionnaires on the tablet prior to your receipt of the device. Ensure that the Telephone number of the household is entered in the relevant section provided on the questionnaire. This will allow your supervisor to more easily review your work to allow random checks to be made. Most households completed will be expected to provide you with a telephone number.

## **SECTION 1 - HOUSING**

This section of the questionnaire list questions from 1.1 to 1.18. Questions 1.1 to 1.2 are self-explanatory. Question 1.5 distinguishes between “Owned (with mortgage)” and “Owned (without mortgage)”, when the respondent indicates that the dwelling is owned, you must ask them whether they are still making mortgage payments on the dwelling. This will allow you to determine the category into which to place them. This question is verified at Section 2(1), please record this response there, if the dwelling is owned. Recording the household as being owned will automatically open the section requesting information on the amount of mortgage paid by the household.

**Question 1.7** distinguishes between a normal pit latrine and one which is ventilated, please ensure that if the response received is pit latrine you specify which of the two categories is being referred to by the respondent.

**Question 1.11** what we are trying to determine here is the average number of days for which the respondent has not received water in the pipe over the past twelve months. Please note that if the respondent has a water tank they may not know when there is water in the pipe, in this case you should record “8” to represent “Don’t Know”. For respondents with a water source which is not piped into the dwelling or yard Ques 1.11 is not applicable and the tablet application will skip to the next applicable question.

**Question 1.13** Ask this question to all respondents. Respondents renting their dwelling units may not know the year it was built, in this case select the relevant response 13 “Don’t Know” and move to the next question.

**Ques. 1.15** tries to determine the number of bedrooms contained in the dwelling unit, similar to **Ques. 1.14** which relates to the number of rooms. Note that a room must be separated physically from another room with walls of a permanent nature, makeshift partitions using cloth for example should not be considered in deciding on the number of rooms. **Note also a bedroom is a room used exclusively for sleeping.**

**Ques. 1.17** This question requires the respondent to make an overall assessment of the current economic situation of the household, and compare it to the overall economic situation existing 12 months prior to the interview. This is not simply a monetary measure, but rather, an assessment of the household's resources and the ability to meet its material and psychological needs.

**Ques. H2.** Please note that the items to be included here must be owned and in good working order. These assets should be the most recently acquired. This section of the tablet application is a roster. All items the household currently owns and are using is listed here. **Please firstly select the items owned or in use (or have access to) by household members within the dwelling unit.** Once you have done this a list of five questions will appear on the tablet pertaining to the items you have previously selected. Please use this section to indicate in the case of each item, the number of items you own, the age of the most recently acquired item, the cost of purchase when the item was bought and your estimate of its current market value. The current value is the resale value of the item – This is the current value at which the household is willing to resell their asset.

## **SECTION 2 - EXPENDITURE ON ACCOMMODATION**

This section of the questionnaire is divided into three parts. Upon responding to the initial question you will be referred to the appropriate section of the questionnaire. Remember for some households persons could have both occupied their own home and also rented during the course of the last twelve months (the reference period used for most of the questions in this section).

**PART 1 - OWNER OCCUPIED ACCOMMODATION** – In this part of section 2 all expenditures related to an owner occupied dwelling is requested from the respondent.

**PART 1 Quest 1.2** The land being referred to in this question is the land on which the dwelling unit is built, **if the land is owned by a household member, this question is not applicable.** Land which is rented or leased is based on a specific agreement between the land owner and a member of the household, land leased is usually based on a longer term agreement of over a year while rented land is based on shorter term agreements usually requiring more regular payments, example monthly payments.

**Quest 1.4** Please note the skip instruction at Quest. 1.4. For dwelling units where parts of the building is not Sub-letted you are must skip to Ques. 1.6.

**Quest 1.6** This is a **VERY IMPORTANT** question. You are asking the household head or responsible adult to estimate the amount they would charge if they were to rent the accommodation. This question like renters rental cost is very much related to the area where the dwelling unit is located.

**PART 2 - PROPERTY BOUGHT/CONSTRUCTED IN SURVEY YEAR** these questions apply to all buildings constructed in the last twelve months. Upon completion of this part of the questions you should proceed directly to Section 2 Part 3 if applicable.

**PART 3 - RENTED ACCOMMODATION** Please note that if the family occupied a rented dwelling for all or part of the survey year, you must complete this section. Note that in some cases the cost of the rent paid includes payment of utilities. In this section you will clarify whether the monthly rent paid includes electricity, water and/or telephone expenses.

## **SECTION 2(2) - REPAIR AND MAINTENANCE OF DWELLING**

In this section of the questionnaire you are to include cost which were incurred by the household on routine dwelling unit maintenance. The cost of materials and labour related to major capital expenditures which increases the investment value of the building should not be included in the cost recorded in this section of the questionnaire. Material and labour cost which should be included, e.g. fixing the pipe, materials purchased by the plumber and the cost of his labour to be included separately. Cost associated with Christmas time painting of the dwelling unit etc.

### **PART 1 – MATERIALS EXCLUDING LABOUR**

Note: what is required is cost of maintenance and minor repairs

Note: Exclude any expenditures on major additions and improvements which add to the value of the property, e.g. built a new wall, built a retaining wall, etc. Also, exclude expenditure on damages caused by extraordinary events, e.g. hurricane, fire, etc. Even if rented, probe for repair and maintenance expenses.

**Section 2(2)** Read the note on the questionnaire to obtain a full understanding of what is required to answer this question.

### **PART 2 – LABOUR EXCLUDING MATERIALS COST**

Labour cost incurred for minor repairs and maintenance should be included here.

**NOTE: *If the cost breakdown is not known, enter the total expenditure in last field in that section on the tablet.***

## **SECTION 3 - MAJOR TYPES OF HOUSEHOLD EXPENSES**

### **PART 1 – AMOUNT SPENT ON UTILITIES SERVICES**

### **PART 2 – MONTHLY AMOUNT SPENT ON HOUSEHOLD SERVICES**

### **PART 3 – OTHER ANNUAL HOUSEHOLD SERVICES**

This explanation below will be in reference to Part 1, 2, 3.

The expenses which must be recorded in this section of the questionnaire are major expenses of a recurring nature, paid either annually, quarterly or monthly. It is important to note the payment period included in the question. **THE FIRST** part of this section contains mostly services provided externally to the household, such as through a national water or electricity company. **Please note that what is required here is the amount billed to the household and not the amount paid by the household, the amount paid may be a partial payment and may not fully reflect the total amount of the service used during the period under consideration.** In the case of regularly occurring types of expenditures, such as electricity, telephone, water and sewerage bills, what is required is the amount of the last bill **ONLY**. Balances from previous bills should be excluded from the amounts recorded here. **THE SECOND** part of this section contains mostly services delivered by individuals to the household, such as the cost associated with employment of maids and helpers, cost of caring the elderly etc. Note that Q2.1 deals with full time employed staff.

If household members have separate fixed telephone lines which they pay for, these must be included in the total bill of the household. Sewerage bills are paid only by persons who use the sewerage system. The third part of this Section Q3.1 which deals with an annual household expenditure not captured in Part 1 and Part 2 example laundry.

Cable and Internet "Package" can also be collected in areas where they are not paid separately.

#### **SECTION 4 - PART 1 - FURNITURE, FURNISHINGS AND HOUSEHOLD EQUIPMENT**

Complete the schedule in this Section for all items purchased by anyone in the household in the past 12 months.

- Note:**
- I) If any item was bought on an installment plan, you should enter the **TOTAL PRICE** of the item and **NOT** the monthly repayment, the hire purchase price or the first installment.
  - II) If any trade-in allowance was given, the purchase price represents the amount paid plus the value of any trade-in (the full purchase price of the new item before deducting trade-in value).
  - III) You should record all purchases including those bought abroad, through mail order catalogues, over the Internet and purchased in St. Lucia.

#### **SECTION 4 – Cont'd - REPAIRS AND SERVICING OF HOUSEHOLD ARTICLES**

Remember repairs and servicing of equipment does not take into account equipment within the household which are used for the operation of a business within the dwelling unit.

## SECTION 5(1) (A) – FOOD AND BEVERAGES

This section requires only the amount purchased in the last 7 days by the household.

- a) Select the food and beverages items **CONSUMED** by everyone in the household from the list provided in **the last seven days**. Note, you are firstly required to obtain **the physical quantity** of the item consumed by the household, the physical amount and the unit of quantity associated with that amount.
- b) Select the food and beverages items **PURCHASED** by everyone in the household from the list provided **the last seven days**. Note, you are firstly required to obtain **the physical quantity** of the item purchased by the household, the physical amount and the unit of quantity associated with that amount.
- c) As much as possible encourage the household to give you this information in pounds/kilograms/litres/ounces. While other units of quantity are available use them as much as possible only when it is an easily identifiable quantity.
- d) Then, you must record **the value of purchases of the item** made in the last seven days (the last week).
- e) As with amounts consumed and purchased the amounts received as gifts must be recorded and the unit of quantity associated with the quantity of the gifts received.

## SECTION 5(1) (B) – FOOD SECURITY

“Food security exists when all people, at all times, have physical and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life”. (World Food Summit, 1996)

**Food availability:** The availability of sufficient quantities of food of appropriate quality, supplied through domestic production or imports (including food aid).

**Food access:** Access by individuals to adequate resources (entitlements) for acquiring appropriate foods for a nutritious diet. Entitlements are defined as the set of all commodity bundles over which a person can establish command given the legal, political, economic and social arrangements of the community in which they live (including traditional rights such as access to common resources).

**Utilization:** Utilization of food through adequate diet, clean water, sanitation and health care to reach a state of nutritional well-being where all physiological needs are met. This brings out the importance of non-food inputs in food security.

**Stability:** To be food secure, a population, household or individual must have access to adequate food at all times. They should not risk losing access to food as a consequence of sudden shocks (e.g. an economic or climatic crisis) or cyclical events (e.g. seasonal food insecurity). The concept of stability can therefore refer to both the availability and access dimensions of food security.

*These are a set of questions which assess the household on the core aspect of food security. While they may seem repetitive they are not and must be read as stated in full to the respondent to the household section of the questionnaire. Food security goes to the core of issues of indigence and poverty and is therefore treated very seriously in this survey.*

## **SECTION 5(2) – OTHER NON-FOOD EXPENDITURE**

**Note in this case the reference period for non-food items purchased. It is the last 30 days and NOT seven days as exist in the case of food.**

## **SECTION 5(3) - AGRICULTURE PRODUCTS PRODUCED AND CONSUMED AT HOME**

This section deals with home-grown produce. Items that are grown at home have a value even if no monetary transaction takes place. What is needed in this section is an estimate of the quantity in pounds (lbs), unless otherwise specified and the value of home grown produce consumed by his/her household LAST MONTH. For emphasis the quantity and value of what is actually “eaten” by all members of the household is what is required. Where quantities are written into the description of the item, the quantity should be recorded using this unit otherwise all quantities are to be recorded in pounds (lbs). For example, Oranges should be recorded in number based on the description given “Oranges (number)” whereas fish caught, string beans etc should be recorded in pounds. Note from the list provided agriculture products covers produce grown, fish/crabs/shrimp caught or grown in ponds for household consumption.

## **SECTION 6(1) - TRANSPORTATION**

- Note:**
1. List on a separate line each motor vehicle, motor cycle, bicycle etc. and any other vehicle owned and operated in the past 3 months
  2. When trade-ins occur the purchase price represents cash plus amount credited towards traded vehicle, ***always clarify this.***

**Please note that the age of the vehicle is the number of years from the time it was manufactured.** The age of the vehicle is NOT the number of years of ownership. Some vehicles serve a dual purpose and are used for both private and business purposes, you must record the percentage of private or household use made of the vehicle when compared to the percentage of business use to which the vehicle is put. All vehicles owned by the household should be listed in this first part this will trigger the roster of each vehicle to be opened where the main types of vehicular expenses will be recorded.

## **SECTION 6 (2) – VEHICLE MAINTENANCE AND REPAIR EXPENDITURE DURING PAST 3 MONTHS**

What is required is the operational expense associated with running each vehicle for activities related to household operations exclusively. Therefore, if necessary

household members should be interviewed separately about running cost associated with the operation of their vehicle(s) over the past three month period.

**SECTION 7 – MORTALITY, PERSONAL SAFETY, CRIME AND VIOLENCE**  
**Not just reported crime....**

**SECTION 8 – SOCIAL BEHAVIOUR AND EXERCISE**

This section requires data from household members who are engaged in certain social behavior and exercises.

**SECTION 9 – SHOCKS AND COPING STRATEGIES**

**This Section seeks the household experiences with significant SHOCK related to CLIMATIC events.**

# **THE PERSONS/INDIVIDUAL QUESTIONNAIRE**

## **SECTION 1 - CHARACTERISTICS**

### **1.1 Relationship to Head**

This question clearly identifies each member of the household and their relationship to the head of the household. The first person listed at '01', the answer will always be 1: head. Otherwise indicate the relation to the first person of all other persons listed. Step-children, children of one partner, adopted children are all to be considered children and categorized as child, if they are so related to the head of household. Other relative" would include any other relative who does not fit options 2, 3 or 4.

### **1.2 Sex of Person**

It is not always possible to tell the sex of a person by the name alone. Therefore you must ask this question as long as you are not interviewing the person to whom the question relates. Whenever in doubt as to the sex of the respondent you must actually verify this.

### **1.3 Age of Person**

Person's age is required here.

There may be instances, especially in the case of old people, where a respondent does not remember his/her age or the exact age of the person to whom you are referring. Since a 'not stated' or 'not known' answer or a blank is NOT ACCEPTABLE and would require that you pay another visit to the household, you may need to probe to find out the correct answer or to ask to see the person himself/herself.

If age is not stated please estimate age if you see the person. Otherwise ask the respondent to estimate the person's age. We would much rather have an estimated age than try to impute an age using a computer program which can in this instance come up with a very inaccurate estimate.

### **1.4 Ethnicity**

Since in the majority of cases you will be interviewing one member of the household, you have to enter the group to which the respondent says he/she and other members of the household belong. DO NOT GUESS. If the person belongs to a group other than those identified in Categories 1 to 10,

Select option 10.

### **1.5 Religion**

If the individual does not belong to any of the religious groups listed on the questionnaire, enter 20, Other.

### **1.6 Marital Status**

If the individual does not fit into any categories listed on questionnaire, enter 6, Not Stated.

### **1.7 Mobile Phone/1.8 Type of Mobile Cellphone/1.9 How much is Spent on Cellular Telephone**

Increasingly over the last few years telecommunications have become more and more personalized. This is particularly so for mobile phones. Previously the fixed line used by all members of the household was the principal means of telecommunications by phone. This has been replaced in the last four years by the mobile phone. In this question therefore we are asking the respondent to tell us if he/she owns a fully operational mobile phone and the amount she/he was billed in the last month for its use by a provider.

For pre-paid cell-phone the amount required is the amount spent on phone cards in the last 30 days prior to the survey reference week. In the case where the respondent uses a post-paid cell phone the amount required is the amount of the last bill. The amount of the last bill better reflects the amount of actual service used by the respondent even if he/she may have made only a part payment.

### **1.10 Internet Access**

This question is directed at all persons and like mobile phone use, internet access has become highly personalized. Access to what are now termed ICT's are important factors in education/training, governance etc. in an increasingly globalized world. This is the objective for the world which was stated in the principles of last World Summit of the Information Society "*.....everyone can create, access, utilize and share information and knowledge, enabling individuals, communities and people(s) to achieve their full potential and improve their quality of life in a sustainable manner*" therefore this question request information from each household member on how internet access is obtained and allows for multiple responses. If None is X' ed then no other response can be indicated.

### **1.11 Bank Account**

Respondents should respond with a 'yes' or 'no' answer to this question. Yes can be chosen in the case of the respondent having a bank account and also a credit union account. Many person own both types of accounts.

## **SECTION 2 - HEALTH**

This section of the questionnaire tries to ascertain the health of the population by examining the population's degree of affliction by both serious illnesses and illnesses of a much milder nature. This section also examines the prevalence of chronic diseases which can eventually lead to death.

### **Ques. 2.1, 2.2, 2.3, 2.4, 2.5, 2.6**

These questions try to establish the severity of illness/injury which are generally not life threatening by trying to determine the extent to which a segment of the population may be incapacitated due to the effect or lack thereof of these illnesses. If the respondent indicates that they were confined to a bed as a result of one of the

conditions mentioned you must find out what that sickness was and fully describe it at Ques 2.2. Similar to Ques 2.1, Ques 2.3 inquires about illnesses which did not require the respondent's confinement to bed for any period during the last 4 weeks. This question requires only that the respondent "suffer" from the illness to be classified with option 1 "Yes". Please note that in either case it is appropriate to record crime or accident related injuries since these have increased in prominence over the past five years and are considered legitimate answers to these questions.

Q2.5. Please note that NIC is not to be considered as health insurance even though it contains health insurance components. Note that we collect this information in the employment section of the questionnaire and there is no need to have it recorded here.

**Ques. 2.7, 2.8**

These questions recognize the fact that a lot of meals are consumed outside the home consequently we ask to each individual information about whether they engage in this activity and how much was past purchasing food outside the home in the past two weeks.

## **SECTION 3 - EDUCATION**

It tries to assess the education services provided, the level of access to education services available, its quality, support programmes which assist in ensuring, that all, children in particular are able to obtain school books and are supported through a school feeding program to obtaining the meals required to be focused on learning.

**Ques. 3.1, 3.2, 3.3, 3.4**

Questions 3.1, 3.2, 3.3 and 3.4 in this section should be asked to all persons, irrespective of age. Persons not attending school/classes at Q3.2 are required to proceed to Q3.6, all persons attending school presently therefore are required to answer questions Q3.1 to Q3.13. If a person can read but cannot write, he/she is considered illiterate and the proper response is NO. This SLC/HBS will not include rigorous testing of literacy; interviewers will have to use their judgment and information from the respondent to assess each person. Literacy can be in any language, not just the main or official language, provided it is commonly used in a written form.

**Ques 3.4, 3.5**

Please record the highest grade completed by the respondent. Only after sufficient probing will an interviewer accept a response of "don't know".

Because the education system has changed in St Lucia, both the former and current types of grades are included. Tertiary classifications have been made very detailed to allow for more detail in the collection of this information and to allow where possible for an assessment to be made of the various tertiary programmes currently undertaken at the main institution on the island.

## SECTION 3(A) – SOCIAL PROTECTION

This section is designed to provide an assessment of the impact on the poor of social protection programs. It will therefore provide feedback on the extent to which the current social protection programs are in fact pro-poor.

All social protection activities of the government are listed here, a list of 23 programs are listed. In the case of some individuals they benefit from employment programs of the government. In other cases it may be a poor or old age relief programme. For each person determine whether or not the individual participated in such a government program. If the person does not participate in any government program select **option 23 at Q3A. Otherwise record the response. After you do that the roster will open up and allow you to enter the salary received or the value of the benefit received, the date when the benefit started and the time period covered. NOTE: the exact date is not necessary the month will suffice in this case record the date as 01 the first day of the month followed by the rest of the date information.**

## SECTION 4 – ECONOMIC ACTIVITY

This section tries to determine the employment characteristics of persons 15 years of age and over. Their economic activity status is what is assessed, that is whether the respondents in question are employed, unemployed or out of the labour force. This section tries to determine for those persons unemployed or out of the labour means employed to sustain their livelihoods. This section also takes a look at the employed and whether the employment activities engaged in are tourism related. For the self employed respondents are asked for information on the level of informality associated with their businesses, the amount of weekly sales generated etc.

### Ques 4.1

This question measures usual activity status, this is an attempt to determine how much work a respondent received during the course of the last 12 months. Please note that vacation time is not to be considered as time away from work since during a period of vacation the respondent would still have a formal attachment to his/her job. What is required is the number of months for which the respondent was employed for pay, profit or family gain during the last twelve months and this includes periods of vacation where a formal attachment is maintained to the job.

### Ques 4.2

Here we include both formal and informal work, both paid and unpaid work, including work on the agricultural holding. If the person worked at any time in the previous seven days, record 'Yes' and *skip to Q4.9*. If the person did no work at all in the previous seven days, the interviewer will record No and continue with Q4.3.

### Ques 4.3

This question is asked of persons who did no work in the previous seven days. You will determine whether they would have worked, but had not done so due to being ill, being on vacation, being subject to strike lockouts, or any other condition which resulted in a temporary absence of the person from work. If the person is employed

and was only temporarily absent from work, record 'Yes' and *skip to Q4.9*. If the person did no work last week and was not absent from any job that was waiting for them, based on a contract or a definite obligation from an employer, record No and continue with Q4.4.

**Ques 4.4**

This question establishes whether those who said 'No' to both Q4.3 and Q4.2 (neither currently working nor temporarily absent from work) were voluntarily in the labor market. A 'Yes' response is appropriate only if two conditions are true: the person was both looking for work and ready to take on work. If a person is sick or engaged in some social activity that would preclude him/her from working, then he/she would not be considered as ready for work and should be entered as a 'No' response for this question. If a person is capable of taking on work but was not looking for work, a 'No' response would also be entered for this person.

**Ques 4.5**

This question is asked for all persons who said No to both Q4.2 and Q4.3 (neither currently working nor temporarily absent from work). Only one reason for not working will be recorded; if there is more than one reason, record the main reason. Use the response "maternity leave" who recently had or will be having a baby. After asking Q4.4 for someone who is not working nor temporarily absent from work, you must then *skip to Q4.9*.

**Ques 4.9**

This question is asked for all persons who said yes to either Q4.3 or Q4.2. This question tries to determine the length of time for which respondents who work have held their current jobs. Often earnings levels are directly related to length of time one works at the same job is promoted and gains experience, frequent job changes usually have a negative impact on the level of pay received.

**Ques 4.10**

This question should state the number of hours the respondent usually works for a week as assessed over a longer period than the survey reference period which is two-weeks. In providing this information the respondent should exclude annual leave, meal breaks and time taken to travel to and from work.

**Ques 4.19: Occupation**

The occupation of the respondent must be as fully described as is possible to allow its classification by officers of the Statistical Office. Therefore, it is not sufficient to say "clerk" or "supervisor". A more detailed title is required; such as "accounts clerk" or "production supervisor". A brief description of the duties is also required. This will help in allocating the correct code.

**Ques 4.20: Industry**

Due to the great importance of the tourism sector as the main driver of our country's economy we have classified industrial groups in tourism related industry as opposed to other industries which are not tourism related. For example, a minibus driver carrying nationals from the south to the north of the island will be classified as transportation – other whereas a respondent working with a taxi association at one of the airports will be classified as being engaged in tourism related transportation and therefore would be classified as Transportation – tourism related.

**Ques 4.24** this question seeks to find out how long the respondent has been without work. Q4.25, tries to determine from the respondent if he/she have every worked or had a job.

## **SECTION 5 – UNION STATUS AND FERTILITY FOR PERSONS 15 YEARS AND OVER**

The questions in this section relate to family formation and population growth. This information will allow projections of population size and structure as an important input for social and economic planning.

Questions on marital status and union status apply to all persons 15 years age and over.

### **Ques. 5.1**

The focus of this question is on the union status of the person and not on the marital status. Wherever these two concepts conflict the present union status takes precedence over the marital status. For example, a lady may be legally married yet is being visited by or is visiting another person. In this case you must record the person as being in a visiting relationship (option 3). What is important is the relationship from which this lady is most likely going to be exposed to becoming pregnant.

Persons who are recorded as legally married (option 1) must have obtained a legal marital certificate from a religious denomination or through another appropriate legal means; they must also be in a present union with their spouse. Two persons living together in present union but who are not legally married are to be classified as having a common law union (option 2). A person who is legally married and not in present union with any partner is to be recorded as Married but not in a union (option 4). A person who is not in a union (option 8) has never been married and is not **engaged in a sexual (intimate) relationship.**

Legally separated applies to married persons are living apart and separated by a court order. After Q5.1 has been answered all male respondents must skip to Section 6.

### **Ques. 5.1, 5.2, 5.3**

Many of the questions contained in this section of the questionnaire are sensitive. If possible ask them directly to the respondent privately. This is particularly so for females in the care of their parents under the age of 20 years. These questions will require special care when the inquiry is made. Once again where possible ask the respondent these questions privately.

The next question Q5.3 ask the respondent her age when she had her first live-born child. Q5.2 ask for the number of live-births born by the respondent in the last twelve months. Females fifteen years and over who have not had a live-born child in the last twelve months must skip to Section 6.

## **SECTION 6 - CLOTHING PURCHASED/RECEIVED AS GIFTS**

This section requires consumption information for individual items of clothing. The approach to answering all sections requiring this type of detailed information is as follows

- i) Read out the question “Did ..... purchase or receive as gifts any of the following items in the past 3 months?”
- ii) Read the broad heading first and inquire from the respondent if any of these items were purchased or received as a gift, if there is no response, perhaps because the broad heading is not understood by the respondent start calling out some of the items. If the respondent indicates that they did purchase or receive as a gift a specific item record the quantity and its value.
- iii) Note that if the item was homemade you must also record the quantity and an estimated value put on the item by the spender under the “purchased” column. If an item was both “purchased” and “homemade” the two should be added and one entry should be made for that specific item in the quantity and total cost boxes in the purchased column.
- iv) At the end of the section all broad headings should have been read and all items recorded.
- v) On your return home from the interview put “0” box for all the items not purchased by the respondent. It is too tedious to try to “0” for all items as you go through the interview with the respondent.

For this and all other sections on the questionnaire you are to use the following procedure when completing information on items of expenditure to be collected. All entries which are “Not Applicable” an entry of “0” should be made. For entries which are “Not Stated”, make an effort to obtain an answer.

## **SECTION 7 – FOOTWEAR – SHOES AND OTHER FOOTWEAR**

This section requires consumption information for individual items of clothing. The approach to answering all sections requiring this type of detailed information is as follows

- i) Read out the question “Did ..... purchase or receive as gifts any of the following items in the past 3 months?”
- ii) Read the broad heading first and inquire from the respondent if any of these items were purchased or received as a gift, if there is no response, perhaps because the broad heading is not understood by the respondent start calling out some of the items. If the respondent indicates that they did purchase or receive as a gift a specific item record the quantity and its value.

- iii) Note that if the item was homemade you must also record the quantity and an estimated value put on the item by the spender under the “purchased” column. If an item was both “purchased” and “homemade” the two should be added and one entry should be made for that specific item in the quantity and total cost boxes in the purchased column.
- iv) At the end of the section all broad headings should have been read and all items recorded.
- v) On your return home from the interview put “0” box for all the items not purchased by the respondent. It is too tedious to try to “0” for all items as you go through the interview with the respondent.

For this and all other sections on the questionnaire you are to use the following procedure when completing information on items of expenditure to be collected. All entries which are “Not Applicable” an entry of “0” should be made. For entries which are “Not Stated”, make an effort to obtain an answer.

## **SECTION 8 - OTHER EXPENSES**

This section requires information for individual items by category, medical, educational, entertainment, transportation, personal and other expenses. The approach to asking for this information is similar to that stated above; however, completing this section properly may require reading out more of the responses to jog the memory of the respondent. Please note that some of the responses require entry of a quantity, these entries include doctor and dentist visits, transportation and school meals etc.

## **SECTION 9 - OTHER DISBURSEMENTS**

This section requires information on disbursements made by the spender for non-consumption related items over the last month. This section is divided into two parts, firstly, there are the non-consumption expenditures which are made on a monthly basis, these include income taxes, life insurance premiums paid, hire purchase installments, allowances to children, subscriptions to trade unions etc. Please note these are frequently occurring disbursements usually made every month, therefore the question asked relates to a one month period. Some of the more frequently occurring items are highlighted for emphasis, be sure to read them out in addition to the others to ensure that information which often exist is obtained on these items.

The second part to this table of disbursements refers to non-consumption expenditures of a less frequently occurring nature these are largely investment type items which may bring a stream of income in the future such as bank deposits or CDs earning special rates of interest, sou-sou, treasury bills, investments in stocks and real estate etc.. Note that a lot more boxes is devoted to these items since they can be potentially very large.

## **SECTION 10 - INCOME**

This section is divided into two. Firstly, there are income sources from employment and secondly there are other income sources. This section tries to cover all major sources of income received.

### **INCOME SOURCES – OTHER, RECEIVED ANNUALLY**

**1A (a) and 1A (b) Income from employment**

Because of the importance of income in this survey we are asking this question twice. On this occasion we are asking the respondent for the exact amount he received as gross income in the last pay period.

What is required is the total income from work, for the last pay period, including allowances, before any deductions for income tax or for any other purpose. Use the key provided to record the last pay period. For self-employed persons (either employers or own account workers) the net income is total income less salaries and business operating expenses. Most times you will receive annual incomes from this group. Use the "Income Flash Card" supplied and enter the income level category in the box provided.

**The Income Level Categories are as follows:**

<b>Categories</b>	<b>Weekly</b> \$	<b>Fortnightly</b> \$	<b>Monthly</b> \$	<b>Quarterly</b> \$	<b>Annually</b> \$
1	<50	<100	<200	<600	<2500
2	50 – 99	100 – 199	200 – 399	600 – 1199	2500 – 4999
3	100 – 199	200 – 399	400 – 799	1200 – 2499	5000 – 9999
4	200 – 299	400 – 599	800 – 1199	2500 – 3599	10000 – 14999
5	300 – 499	600 – 999	1200 – 1999	3600 – 5999	15000 – 24999
6	500 – 999	1000 – 1999	2000 – 3999	6000 – 11999	25000 – 49999
7	1000 – 1499	2000 – 2999	4000 – 5999	12000 – 18499	50000 – 74999
8	1500+	3000+	6000+	18500+	75000+
9	Not Stated				