



TOKELAU

2015/16

Household Income and Expenditure Survey

QUESTIONNAIRE INSTRUCTION MANUAL

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PART 1: INTRODUCTION

This manual is intended to be used by supervisors, interviewers and other staff working on the 2015/16 Tokelau Household Income and Expenditure Survey (HIES). The main purpose of the manual is to assist both supervisors and interviewers in filling out each of the different survey forms used to collect information in the field.

The manual is divided into 7 parts covering:

- 1) Introduction
- 2) General guidelines for completing survey forms
- 3) Specific guidelines for completing Module 1
- 4) Specific guidelines for completing Module 2
- 5) Specific guidelines for completing Module 3
- 6) Specific guidelines for completing Module 4
- 7) Specific guidelines for completing the Diary

To assist the smooth conduct of data collection, all staff involved in the survey are required to read this manual before the first round of data collection so they are aware of its contents. It is not necessary to memorize the contents of this manual, but rather be aware of what it contains. Therefore, if a specific question arises in the field, the supervisor and interviewer will know where to go in this manual to address the issue.

PART 2: GENERAL GUIDELINES FOR COMPLETING SURVEY FORMS

2.1 Reference periods

The reference period is the recall period the respondents will be asked to think back to when providing information for Modules 1 to 4. Depending on the information being sought, different reference periods are adopted for the survey. For example, for items such as expenditure on fuel, a 1-month recall period is adopted as it is felt this is the most appropriate reference period for this item. However, expenditure on major household assets have a 12-month reference period as these items are less frequently purchased and it is expected that respondents will be able to remember this information over 12-months.

The reference periods adopted for each question are presented in the top right hand corner of the first page for that question. A colour scheme is adopted to differentiate each reference period, which can be seen below:

Identifier	Colour	Reference period	Example: Interview on 11 May 2015
Reference period last 12 months	Yellow	12 months	12 May 2014 to 11 May 2015
Reference period last 3 months	Green	3 months	12 February 2015 to 11 May 2015
Reference period: last month	Red	1 month	12 April 2015 to 11 May 2015
Reference period last 7 days	Blue	1 week	5 May 2015 to 11 May 2015

The last day of the reference period should correspond to the date of the interview, so if the interview took place on May 12, 2015, then the reference periods for each of the 4 options are given in the example above.

2.1.1 Unknown period

For some questions it is not certain what the reference period will be, so in these situations the regular payment amount is collected and the period that payment refers to is recorded. So, if the payment is \$45.00 monthly do the following:

HOW MUCH IS THE REGULAR PAYMENT? Eg, \$45.00 - Monthly	
NZD	Period Code 1. Fortnightly 2. Monthly 3. Other (note)
21112	21113
\$ <input type="text"/> , <input type="text"/> 4 5 .00	<input type="text"/> 2
\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00	<input type="text"/>

2.2 Understanding codes

A common practice when developing questionnaires is to utilize codes as response categories for certain questions. This saves the interviewer from having to write down the whole description, entering just a code instead. It also saves a great deal of time during data entry if the data entry person simply enters a number.

In the Tokelau HIES questionnaire, codes can appear at the top or at the bottom of the column:

2.2.1 Codes that appear at the top of the column

In the example below, the question relates to each household member's relationship to the household head. The household head should respond with category 01 for this question; whereas every other member of the household needs to select from code 02 – 10 to indicate how they are related to the household head. Make sure the leading "0" is entered where it exists so that both boxes are filled.

RELATIONSHIP TO HOUSEHOLD HEAD	
[HM]	01. Head 02. Spouse 03. Son/Daughter (incl. adopted) 04. Son-/Daughter-in-law 05. Parent or spouse's parent 06. Uncle / Aunt 07. Grand-son/-daughter 08. Brother/Sister 09. Other relative (Note) 10. Non-relative
	<i>Write the appropriate code in the box</i>
	10101 10105
	01 0 1

2.2.2 Codes that appear at the bottom of the column:

Whenever the list of codes is too long, codes are listed at the bottom or on the side of the page; the question number is mentioned as a reference. For example:

MAIN ACTIVITY	
[HM]	What was this ...'s main activity during last week ? (If away, due to holidays or illness, state what this person would normally be doing).
	Codes are listed in the box below. Write the appropriate code in the box.
	If 01 to 08, go to 10202 If 09 to 11, go to 10206 If 12 to 13, go to 10211
10101	10201
01	0 3

ACTIVITY CODES FOR 10201		
<u>Paid employment</u>	<u>Unpaid employment</u>	<u>Not in the labour force</u>
01. Employer (Producing goods or services for sale, running a business with paid employees)	05. Producing goods for own and/or family consumption (self employed)	09. Student - full time
02. Self-employed (Producing goods or services for sale, running a business without paid employees)	06. Unpaid family worker (family business/ plantation)	10. Student - part time
03. Employee, working for wages/salary in public sector (incl. NGO, UN agencies)	07. Unpaid family worker, help with basic household duties inside (washing, cooking, cleaning, etc) and outside (gardening, maintaining lawn, etc)	11. Retired / Too old
04. Employee, working for wages/salary in private sector	08. Volunteer work (community, church, etc.)	12. None - Did not pursue any activity (no work)
		13. Physically/Mentally disabled

The list of all the codes appears at the bottom of the page or on a side of the same page, listing all codes that could apply. In the example above, the main activity of household member 1 is “employee, working for wages/salary in public sector (incl. NGO, UN agencies)”.

2.3 Sequence guides and skips

When interviewing respondents it may be that some questions, based on previous responses, will no longer be relevant for that respondent. It is then desirable to have these questions skipped, because it will speed up the interview. In practice we use what are called “skips”, or “sequence guides”.

A skip or sequence guide directs the interviewer past certain questions if they are clearly no longer relevant.

The example below shows sequence guides for both question 10201 and 10204. In the case of question 10201, the coded response determines which question to go to next (e.g., if response 01-08 proceed to 10202, if response 09-12 proceed to 10206, etc.). For question 10204, the answer to the question once again determines where next to go (e.g., if 30+ hours then proceed to 10206, whereas if response <30 hours, proceed to 10205).

MAIN ACTIVITY		MAIN ACTIVITY SECTION				NOTE ID
		TYPE OF ACTIVITY (occupation)	WORKING INDUSTRY	WORKING HOURS	WILLING TO WORK MORE	
[HM]	What was this ...'s main activity during last week ? (If away, due to holidays or illness, state what this person would normally be doing). Codes are listed in the box below. Write the appropriate code in the box. If 01 to 08, go to 10202 If 09 to 11, go to 10206 If 12 to 13, go to 10211	<i>Examples:</i> nurse, teacher, enumerator, security, cook, shop-keeper, farmer, fisherman	What industry did ... work in? <i>Examples:</i> health, education, security, restaurant, retail sales, agriculture, fisheries	How many hours did ... work in this main activity last week ? (Include sick, annual and statutory leave) If 30+ hrs, go to 10206 If <30 hrs, go to 10205	Would ... be willing and able to work more hours in this main activity ? 1. Yes 2. No	
	<div>Indicates which question id to go, based on the response provided to the question</div> <div>10202 refers to this next question</div> <div>10206 & 10211 refer to question on the next page</div> <div>Next page</div>					
10101	10201	10202	10203	10204	10205	10299
01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> hrs	<input type="text"/>	<input type="text"/>

2.4 Shaded area

Some questions have shaded areas that generally mean nothing needs to be written in these parts by the interviewer. For example, question 20406 in Module 2 (below) where the shaded area is crossed out, no information is required.

Line no.	Did you pay? 1. Yes 2. No	Expense code	Expenditure description	Expenditure type (tick if applicable)		NOTE ID
				Purchase	Repair	
20401	20402	20403	20404	20405	20406	20449
1 - Payment for land						
01	<input type="checkbox"/>	101	Land lease	<input type="checkbox"/>	n/a	<input type="checkbox"/>
2 - Expenditure related to construction of a new house, an extension or major modification						
02	<input type="checkbox"/>	201	Surveying, architectural or drafting fees	<input type="checkbox"/>	n/a	<input type="checkbox"/>
03	<input type="checkbox"/>	202	Building permits, registrations fees	<input type="checkbox"/>	n/a	<input type="checkbox"/>
04	<input type="checkbox"/>	203	General contractors, helpers, labourers	<input type="checkbox"/>	n/a	<input type="checkbox"/>

The shaded areas indicate to leave question 20406

Other examples of shaded areas are in questions 40704 to 40706 - they should also be left blank, as these questions are not relevant for that income type.

2.5 Legible writing

Two main parties will generally be responsible for completing the information in the survey forms:

Modules 1 – 4: The interviewer

Household Diary: The household head and, at times, other members of the household.

All of the information will be entered into the computer after fieldwork has been completed for that round, so it is absolutely imperative that:

- the interviewer fills in the modules with neat, clearly legible writing;
- the interviewer makes sure the households fill in the diary with neat, clearly legible writing;
- the supervisor checks the quality of the writing before entering the data.

Survey forms filled in with poor writing will lead to errors during the data entry phase and also slow down the data processing phase.

An example of poor and good writing is as follows:

Line no.	EXPENSE CODE (20504)	DETAILED DESCRIPTION OF THE EXPENDITURE	EXPENSE TYPE	BENEFICIARY	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	LOCATION OF PROVIDER	NOTE ID
	101 to 505		1. Purchase 2. Repair	1. Own HHs house 2. House of another HH	NZD	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	
20551	20552	20553	20554	20555	20556	20557	20599
01	304	Gas Stove	1	1	\$ 200.00	2	<input type="checkbox"/>
02	311	Generator	1	2	\$ 750.00	2	<input type="checkbox"/>

Legible writing

Good writing

Poor writing

Poor writing

In the above example, the data entered in Line 01 is clear and legible, whereas in Line 02 it is not. Even if the data entry staff interpret the information correctly for Line 02 during data entry, the poor quality of the writing will slow them down at their task.

The use of pencil is recommended to complete the forms, so an eraser can be used to correct poor writing and mistakes.

2.6 Recording monetary amounts


Throughout all survey forms (4 modules and the household diary), monetary values need to be recorded for each household and individual's income and expenses. The standard process for recording this information is as follows:


2.6.1 Modules 1 to 4

Only enter amounts in whole dollars – do not provide cents. To encourage this, whenever an amount is requested, the cents component has been filled in with a “.00” – see below:

\$ | | , | | | | .00

When entering the dollar amount, always enter the digits to the right hand side of the boxes provided, not the left. See below for an example:

\$ | | , | | | 6 | 0 | .00 


\$ | | , | 6 | 0 | | .00 


2.6.2 Household Diary

For the Household Diary, always provide the amounts in dollars and cents. To encourage this, a place has been allocated for both dollar and cents amounts, separated by a decimal point – see below.

\$ | | , | | | | . | | | | °

Please make sure the cents amount is entered, even if the item was a whole dollar amount. See below for an example:

\$ | | , | | | | 4 | . 0 | 0 | ° 

\$ | | , | | | | 4 | . | | | | ° 

2.7 The “Notes” box

“Notes” box appears on most pages in all 4 Modules where space allows (normally at the bottom of the page). Also, in the last column (question) of every page, there is a column called “Note ID”. The “Notes” box and “Note ID” column are to work in conjunction with each other, and enable the interviewer to document any issue or provide additional clarity that may be required during data collection.

The way it works is that if an interviewer:

- Encounters a particular issue with a question that needs more detail:
- Then tick the option “Other” as a response to a question the “Note” is mentioned in (), and
- Interviewer assigns a “Note id” number in the “Note id” column of that table.

The details of that issue can then be recorded in the next available “Notes” box, with the number for that particular issue. Note that every issue must be numbered sequentially within a section. So if 3 issues occur in one section, then record each where it occurred along with the details in the box and note ID 1 to 3.

An example of how this works is provided below:

	RELATIONSHIP TO HOUSEHOLD HEAD	DATE OF BIRTH	BIRTHPLACE	CITIZENSHIP (primary)	MARITAL STATUS	WHERE DO THESE PEOPLE USUALLY LIVE?	
[HM]	01. Head 02. Spouse 03. Son/Daughter (incl. adopted) 04. Son-/Daughter-in-law 05. Parent or spouse's parent 06. Uncle / Aunt 07. Grand-son/-daughter 08. Brother/Sister 09. Other relative (Note) 10. Non-relative <i>Write the appropriate code in the box</i>	dd/mm/yy	1. Tokelau: Atafu 2. Tokelau: Fakaofo 3. Tokelau: Nukunonu 4. Tuvalu 5. Samoa 6. New Zealand 7. Australia 8. Other Pacific Island Country (note) 9. Other (note) <i>Write the appropriate code in the box</i>	What is ...'s citizenship country? 1. New Zealand 2. Samoa 3. Other (note) <i>Write the appropriate code in the box</i>	What is ...'s present marital status? 1. Never married 2. Legally married 3. Separated 4. Divorced 5. Widowed <i>Write the appropriate code in the box</i>	1. Usual resident currently here 2. Absent less than 1 month for work, holidays 3. Absent for more than 1 month but regularly dependent on this HH (eg, students in dorm only, persons in hospital for long-term medical care) 4. Absent for more than 1 month but supporting this HH and expected to return (seamen, seasonal workers) 5. Visitor currently living with HH (more than 6 months)	NOTE ID
10101	10105	10106	10107	10108	10109	10110	10199
01	01	11 09 75	01	1	2	2	1
02	02	03 01 82	09	1	2	1	2

Id	NOTES
1	The head of household is currently in Samoa for working reason, he will get back in few weeks' time
2	The wife was born in France

Supervisors will then be required to address any issues that have been identified in the note box, with the interviewers. The details provided in the box will also help the staff in the Statistics Office, along with the data entry staff, in dealing with problematic and unclear issues during data processing.

2.8 Dealing with unknown responses

For monetary values in particular, respondents will often say they are not aware of the actual amount they paid or earned for a particular time period. When this situation arises, follow these simple steps:

- 1) Refer to records (e.g., receipts for expenses or check-stubs for income).
- 2) If this is not possible, request a best guess answer from the respondent, even if they feel they have no idea.

Key rule

A rough guess is better than no guess at all

2.9 Dealing with question refusals

A survey such as an income and expenditure survey collects information which some respondents will view as sensitive, especially with respect to income. Although the members of the household are willing to participate in the survey, they may therefore just wish to refuse answering a question or two. When this situation arises, follow two simple steps, as follows:

- 1) Remind the respondent of the confidential nature in which this information is being collected and that responses provided will not be made available to the public. Individual answers will not be disclosed. Only total figures will be published. Remind them you have signed a secrecy statement with TNSO.
- 2) Don't push the household members too hard to respond, if they insist on refusing to provide an answer to that question.
- 3) Provide details in one of the "NOTES" boxes so appropriate action can take place back in the office

Key rule

Whilst encouraging full responses as best as possible, don't push respondents too much if they refuse to provide information for certain questions

2.10 The "Other" category

Some questions have categories requiring a box to be ticked, and also have an option after each of the categories listed as "Other" (note: this happens a lot in Section Q2.1 of Module 2). This is done because it is not always possible to list every category response for a question. When something is classified as "Other" there will be instances when a description is required to specify what this "Other" category is. Please write the description in the space provided or in the NOTES box. This information will assist the development of these questions in future surveys.

2.11 Responding to "Yes/No" questions

There are numerous questions throughout the four modules that require the interviewer to respond with a simple "yes" or "no" answer. For most of these questions the following code applies:

- 1 = Yes
- 2 = No

When this is the case, make sure that the numerical code is written down in the space provided and not the worded answer "yes" or "no". An example of such a question is provided below:

Line No.	Do you own?	In the last 12 months, did you spend on?	Expenditure code	Items Description
	1=Yes 2=No			
20501	20502	20503	20504	20505
1 - Purchases related to furniture, furnishings and floor coverings.				
01	<input type="checkbox"/>	<input type="checkbox"/>	101	Beds, mattress, bedroom sets (headboards, frames, etc.)
02	<input type="checkbox"/>	<input type="checkbox"/>	102	Sofas, lounge chairs, couches, sofa sets, etc.

Enter either a '1' or '2' in the box provided. **Do not** enter "Yes" or "No"

2.12 Emphasizing key words

In many questions, some words are more important than others: they are underlined and/or highlighted in bold. In particular, this occurs in the labour force (activity) questions covered in Section S1.2 of Module 1. Emphasizing these words will help the interviewer understand which aspects of the question are most important. Some examples are shown below for questions 10201, 10204 and 10205:

MAIN ACTIVITY		MAIN ACTIVITY SECTION				NOTE ID
		TYPE OF ACTIVITY (occupation)	WORKING INDUSTRY	WORKING HOURS	WILLING TO WORK MORE	
[HM]	What was this ...'s main activity during last week ? (If away, due to holidays or illness, state what this person would normally be doing). Codes are listed in the box below. Write the appropriate code in the box. If 01 to 08, go to 10202 If 09 to 11, go to 10206 If 12 to 13, go to 10211	<i>Examples:</i> nurse, teacher, enumerator, security, cook, shop-keeper, farmer, fisherman	What industry did ... work in? <i>Examples:</i> health, education, security, restaurant, retail sales, agriculture, fisheries	How many hours did ... work in this main activity last week ? (Include sick, annual and statutory leave) If 30+ hrs, go to 10206 If <30 hrs, go to 10205	Would ... be willing and able to work more hours in this main activity ? 1. Yes 2. No	
10101	10201	10202	10203	10204	10205	10299
01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> hrs	<input type="text"/>	<input type="text"/>

2.13 Answering on behalf of other people

The majority of information for the survey will be able to be provided by the household head. Interviewers are therefore encouraged to collect as much information for each of the modules from the head initially. However, when conducting the interview for each of the 4 modules, collecting accurate information will be a lot easier if as many members of the household (aged 15 and over) as possible are present.

If the household head (or another responsible adult in the household) is responding on behalf of other household members, they may be unsure of an answer. It is then best to organize for collecting this information on the next visit, when:

- that household member is home; or
- the household head has had a chance to find out the correct answer for that question.

Only when all visits are complete, should you accept guesses from a household member on behalf of other household members. When this occurs document the details in the “NOTES” section of the questionnaire, so this information can be reviewed back at the Statistics Office.

2.14 Translation

The information in the questionnaire and the manuals will only be provided in English. Situations will arise where an interviewer will encounter a respondent who is not proficient in English. When this occurs, the following procedures should be followed:

- Respondent speaks Tokelauan:** The interviewer will be required to translate the questions to the respondent in the local language. If they are having trouble with a particular question then the interviewer can seek assistance from the supervisor.
- All the information reported in the modules/diary has to be written in English.
- If the household filled in the diary in Tokelauan, the interviewer has to translate into English before submitting it to the supervisor for checks and data entry.

PART 3: GENERAL GUIDELINES FOR COMPLETING COVER PAGES

3.1 Household envelope

The household envelope is used to store all the questionnaire material for a single household. The envelope also serves for storing information about the unique description for the household (similar to the front cover of each module) which is contained at the top of the front page of the envelope; it also details how the household responded to the survey, at the bottom of the front page of the envelope.

3.1.1 Section 1: Household details

This section allows identifying the household, through different items:

- **HIES HOUSEHOLD ID:** refers to the listing ID which is unique for each household:
 - o All IDs have 3 digits;
 - o All households in Atafu start at 1, household in Fakaofo start at 2, and 3 for households in Nukunonu;
 - o In Atafu, IDs run from 101 to 160;
 - o In Fakaofo all IDs run from 201 to 260;
 - o In Nukunonu all IDs run from 301 to 360.
- **SET A, B or C:** refers to the list (A if no replacement; B if replacement; and C, in an extreme cases - if list B is exhausted the interviewer may chose the household, but this situation is not desirable).
- **Round:** 4 rounds in total to cover the 12 months HIES survey period:
 - o 1 = May 2015;
 - o 2 = August 2015;
 - o 3 = November 2015; and
 - o 4 = February 2016.
- Island and village codes are provided below:

Atoll		Village/Zone	
<i>Name</i>	<i>Code</i>	<i>Name</i>	<i>Code</i>
Atafu	1	Atafu	11
Fakaofo	2	Fale	21
		Fenuafala	22
Nukunonu	3	Motuhaga	31
		Fale	32
		Alatai	33
		Alatua	34
		Muli	35
		Other zone	36

- Household head: the full name is not required as the survey is anonymous, the surname or first name are sufficient.
- Code (sequential number from census listing): refers to the household listing (census ID column 7).
- Phone number (optional): if the household agrees, the phone number might facilitate the interview process in several ways:
 - o If information is missing, just a quick call can save a lot of time or an 8th visit; and
 - o If an interviewer has a problem and cannot visit the household as agreed at the previous visit.

3.1.2 Section 2: Identification of field staff

- Full name of interviewer and supervisor
- Codes of interviewer and supervisor

	Supervisor code	Interviewer code
1. Atafu	11	12
2. Fakaofu	21	22
3. Nukunonu	31	32

- Personal signature (at the end of the round). The signature means that all the information reported in the envelope has been collected in accord with the instructions.

3.1.3 Section 3: Questionnaire completion

Once all material is completed for a household, the bottom section of the envelope needs to be filled in by both the interviewer and supervisor. The interviewer needs to assign a “final household status” to the household. One of three options can be chosen for this part:

- a) Household fully responded to all aspects of the survey: option 1;
- b) Household partially responded: option 2 – at least one section is missing, or can be a full module missing; or
- c) Household did not respond: option 3 – this option should not occur as any refusal or problem should have led to the replacement procedure.

HOUSEHOLD DETAILS					
HIES HOUSEHOLD ID		Set A, B, C		ROUND	
ISLAND		VILLAGE		HOUSEHOLD HEAD (HH)	
First name		Code (Serial number from pre listing)		Phone Number (optional)	
Surname					
IDENTIFICATION OF FIELD STAFF					
ENUMERATOR Name		Code	Signature		
SUPERVISOR Name		Code	Signature		

from 101 to 160 in Atafu
 from 201 to 260 in Fakaofu
 from 301 to 360 in Nukunonu

Refers to the replacement list:
 A = listA (no replacement)
 B = listB (replacement list)
 C = enumerator choose the household (listB not sufficient)

Round1 = May 2015
 Round2 = August 2015
 Round3 = November 2015
 Round4 = February 2015

1 = Atafu 2 = Fakaofu 3 = Nukunonu

Atafu - No village
 Fakaofu:
 21 Fale
 22 Fenuafala
 Nukunonu
 31 Motuhaga
 32 Fale
 33 Alatai
 34 Alataua
 35 Muli
 36 Other

Census household id
 (see household listing)

Supervisors:
 - Atafu = 11
 - Fakaofu = 21
 - Nukunonu = 31
 Enumerators:
 - Atafu = 12
 - Fakaofu = 22
 - Nukunonu = 32

3.2 Cover page modules and diaries

All the cover pages (modules and diaries) require the same information and most of the information is similar to the one required on the envelope cover. For the same household it is very important that all the information reported is the same

- **Household details:**
 - o HIES HH ID: unique
 - o Set A, B or C: based on the replacement
 - o Round: 1, 2, 3 or 4
 - o Household head name/surname
 - o Household size: number of males/females from demographic profile Section 1.1
 - o Phone number
 - o Atoll name and code
 - o Village/zone name and code
- **Field staff details**
 - o Full name and code of interviewer
 - o Full name and code of supervisor
 - o Full name and code of the agent who entered the data (most likely the supervisor)
- **Dates:**
 - o Dates of interview: even if the module is not fully complete
 - o Dates of data entry: even if the module is not fully entered

HOUSEHOLD DETAILS					
HIES HOUSEHOLD ID		Set A, B, C		ROUND	
HOUSEHOLD HEAD (HH)		First name	Code	HOUSEHOLD SIZE	
		Surname		Males	
				Females	
				TOTAL	
Phone number (optional)					
ISLAND		Code	VILLAGE		Code
Other information (optional)					
FORM # house of house					
If more than 12 members in this household another module1 will be required:=Form 1 Of 2 Less than 12 members in the household = form 1 of 1					
FIELD STAFF					
ENUMERATOR				Code	
SUPERVISOR				Code	
DATA ENTRY				Code	
Write the date of the interview for the current module and the date of data entry (date of data entry is ideally the same day or maximum 2 days later)					
DATE INTERVIEW COMPLETED (dd/mm/yy)				DATE DATA ENTRY COMPLETED (dd/mm/yy)	

PART 4: SPECIFIC GUIDELINES FOR COMPLETING MODULE 1

4.1 Introduction

Module 1 – Demographic Information - focuses on recording the basic demographic profiles of persons living in the household.

The information collected in this module is divided into 5 sections:

1. S1.1: Demographic profile
2. S1.2: Labour force status (Activities last week)
3. S1.3: Educational status
4. S1.5: Communication status
5. S1.6: Household members who left the household

Note: health status in section S1.4 has been removed from the Tokelau HIES questionnaire, which is why section 1.4 does not exist.

The approach for tackling the instructions to this module will be as follows:

Section 4.2: Understanding the flap. The flap attached to the cover page aligns the basic person details (name, age and sex) with the remaining questions contained in Module 1 (and 3).

Section 4.3: Demographic Profile. Collects information on other basic personal characteristics contained in the survey.

Section 4.4: Labour Force Status. Collects information on labour force status focusing on what each individual aged 15 and over does as the main and secondary activity each week.

Section 4.5: Educational status. Collects information on educational status of household members.

Section 4.6: Communication status. Collects information on household members' access to information.

Section 4.7: Household members who left the house. Collects information on the income and expenses by household members who no longer live in the household.

4.2 Completing and understanding “the flap”

4.2.1 Introduction

This section provides general instructions on how to fill in “the flap” (or roster) and how it should be used throughout the course of filling in this module (and Module 3).

The flap is an extension of the cover page and contains most basic information of all household members.

A household is defined as “those persons who usually eat together and share the work of preparing the food and/or the cost of work of providing it”. Household members, also called household residents, are persons who are currently residing in the household and include:

- i) Persons who are usual members of the household and are present at the time of the interview;
- ii) Persons who are usual members of the household but are temporarily away on holidays or a work trip for a short time;
- iii) Students who are away at school and are staying in a dormitory (i.e., they do not stay in a host family);

- iv) Students who are attending school outside Tokelau, ONLY if they are staying in the school dormitory, or student compound (they do not stay in a host family);
- v) Long-term patient who is at a medical care center in Tokelau or overseas;
- vi) Seamen and seasonal workers who are absent for more than one month and are supporting the household and expected to return;
- vii) Sponsored students who are physically in the household;
- viii) Visitor who lives in the household more than 6 months and is intending to stay.

Excluded from the list are visitors from overseas (short- or long-term).

There are 12 rows for recording household members - if there are more than 12 members within this household, complete on a new module1 the remaining household members (form 1 of 2 and 2 of 2).

4.2.2 Information to go on “the flap”

Only four items need to be recorded on the flap (or roster):

- 1) Household Member (HM) ID number [HM]
- 2) Name
- 3) Sex
- 4) Age

Details for each are as follows:

10101: Household Member ID number [HM]

This question is already filled in and contains the numbers 01-12. It is very important to refer to this number when recording information in other modules which seek a [HM] number. This occurs in both Modules 1 and 3. This prefilled Household Member ID, 10101, will appear in all the sections of this module except for the last section, S1.6.

10102: Name

Record the name (first name or surname) of the household members. The real name and the full name are not required as the survey is anonymous and no information at the household level will be reported. Name of household members can facilitate the interview and checking the questionnaires.

The household might choose who the head is: this might be the oldest person, or the person who earns the household income. There is no clear definition and the household can chose their own head, however should be guided to choose the main income earner.

10103: Sex

This question simply records the sex of each individual and requires the code at the bottom of the table to be filled in. The codes are simply “1” for Male and “2” for Female.

If all household members are present, the sex of a person can be determined from observation most of the time. Only when there is an absentee then the question needs to be asked, or when clarification is needed.

10104: Age

The age at the time of interview of each household member is to be entered for this question (complete age). That is, as of the date of the interview, how old is the person. Some respondents, especially the elderly, may not know their age, so in these cases a best guess will be appropriate. Do not leave this question blank for individuals as a guess is better than no response at all. However, if the age is not known at all, record “999” in the boxes, a code for unknown cases. For babies who are yet to reach their 1st birthday, record the value “0”.



Make sure that the Age recorded in 10104 is the same as the one you will record on the next page, in the ‘complete date of birth box’, question 10105.

4.2.3 Using the “flap”

The purpose of the flap is to assist interviewers in identifying the correct household members when recording additional information collected in this module. Once the flap has been filled in, open the flap out so this information can be aligned with other pages in the module, thus ensuring the correct details are recorded for each individual.

4.3 Demographic profile (all persons)

4.3.1 Introduction

This section provides general instructions on how to fill in the basic demographic information for each person contained in the flap. The details in summary, collected in this section are:

- Birthdate
- Relationship to household head
- Birthplace
- Citizenship
- Marital status
- Status in the household

Details for each question are as follows:

10105: Relationship to household head

This question aims to determine each member’s relationship to the household head. As stated above, the household head should be the first person listed on the form. Use the code from the list (1 to 10).

When completing this question, [HM] number 1 should record a response of “01” for this question to indicate he/she is the household head. This must be the case for every household responding to this survey. No other member of the household should be assigned a value of “01” as each household can only have one household head.

For all remaining persons in the household, refer to the code list at the bottom of the table to indicate their relationship to the household head. All relatives of the household head should be given a code of 02-09, whilst non-relatives should be given a code of 10. Note the relationship code is a 2-digit code, record code accordingly depending on response given.

Spouse-refers to the person reported as the husband or wife of the head of household.

“Non-relative” is anyone NOT related to the household head by blood, marriage, adoption or who cannot be described by the categories given above.

10106: Birth date

The structure for filling in the date of birth is to follow the format:

dd/mm/yy

Record the date of birth, month, and year (only the last 2 digits of the year born is required). If people don’t know their date of birth, then try your best to at least get the year the person was born. When only the year is entered, record “99”

for the day and month to signify it is not known. Make sure that you fill in the month and day appropriately in the box allocated, e.g. DOB is 8 February 2001, it will be recorded as 08/02/01.

When completing this question, do a quick check to make sure the date of birth is consistent with the age provided in the flap. For example, if a person reports to be 26 years old in question 10104 in the flap, and then say the birth year was 1975, then you know something is wrong: someone born in 1975 should be around 40 years old.

Unless otherwise stated, there is only **ONE** answer option for each question in all sections and modules.

10107: Birthplace

This question requests information about each person's country of birth or place where the household member was born. The 9 main options are provided in the codes list. All other countries not specified in the list will be classified under "8 Other Pacific Island country" or "9 Other" and reported as a note.

10108: Citizenship

This refers to the MAIN country of citizenship of the household member. If the HM has 2 countries of citizenship, specify the primary one. Only 3 options are possible, if option 3 "other" is selected, specify the country of citizenship as a note. In case of dual nationality, write the secondary country in the Notes.

10109: Marital Status

This question requests information on the current marital status of each individual in the household. The 5 main categories are provided in the list of codes, as follows:

1. **Never married** - a person who has never been married.
2. **Legally married** – those who are married by the church or legal system, regardless of whether his/her spouse is living in the household or not, unless they are separated.
3. **Separated** - refers to persons who were married but who have been deserted or who have parted because they no longer want to live together (whether or not the separation is legal).
4. **Divorced** – refers to a person who is divorced and has not remarried.
5. **Widowed** – refers to a person whose spouse has died and has not remarried.

Also make sure the "current" marital status of each individual is entered for this question. That is, if a person was once married, then widowed, his current status is 5 (widow).

10110: Status in household

This is the same category applied to the listing of household members in the flap. Record the appropriate code that qualifies them for membership of the household, as follows:

1. **Usual resident** currently here: all household members who currently live in the house.
2. **Usual resident temporarily away** (might be for work, health reason, or holidays) who will return in less than a month.
3. **Absent for more than a month but still dependent** on this household (student in dormitory or student compound, at the hospital for long term): Household members who left for more than a month but who will return in the household.
4. **Absent for more than a month but supporting the household** and expected to return (members who left the household for working reason: seasonal workers, seafarers, but this house is still theirs).

Example for question 1.1

- **John:** Household head, aged 46, and currently away on work travel for 1 month. He is Tokelauan (born in Atafu) and married to Mary. He has been residing in the house for the entire 12 months.
- **Mary:** Is married to John and aged 44. She was born in Samoa, she is Samoan. She has been residing in the house for the entire 12 months.
- **Tim:** Is the John and Mary's oldest son (born in Atafu), aged 20 years, he is married now and is living in New Zealand.
- **Peter:** Is John and Mary's second oldest son, and aged 17. He was born in Samoa, never been married, and has been residing in the house for the entire 12 months.
- **Sarah:** Is John and Mary's only daughter, and aged 14. She was born in Atafu, never been married, and has been residing in the house for the entire 12 months.
- **Roger:** Is John's father. His wife passed away 4 years ago and has been living with John and his family ever since. He's 73 years old, he was born in Nukunonu and has been residing in the house for the entire 12 months.
- **Sally:** Is John's niece and is aged 4. She is temporarily staying in the household and has been there for 3 months and she will stay there for a long time. She was born in Nukunonu and her parents are living in Samoa.

EXAMPLE: Filling in the Flap

Household Member [HM]	Name (Last name, First name)	Sex	Age
		code 10103	
10101	01 = Household Head	10103	10104
01	John	|_1_|	|_|_4_|_6|
02	Mary	|_2_|	|_|_4_|_4_|
03	Peter	|_1_|	|_|_1_|_7_|
04	Sarah	|_2_|	|_|_1_|_4_|
05	Roger	|_1_|	|_|_7_|_3|
06	Sally	|_2_|	|_|_|_4|

EXAMPLE: Filling in the demographic information

[HM]	Birthdate	Relationship to HH head	Birthplace	Citizenship (primary)	Marital status	Status in household	Note
	dd / mm / yy	code 10106	code 10107	code 10108	code 10109	code 10110	
10101	10105	10106	10107	10108	10109	10110	10199
01	4/02/1969	|_0_|_|1_|	|_1_|	|_1_|	|_2_|	|_1_|	|_|
02	8/09/1970	|_0_|_|2_|	|_5_|	|_2_|	|_2_|	|_1_|	|_|
03	30/12/1997	|_0_|_|3_|	|_5_|	|_1_|	|_1_|	|_1_|	|_|
04	15/01/2001	|_0_|_|3_|	|_1_|	|_1_|	|_1_|	|_1_|	|_|
05	23/04/1942	|_0_|_|4_|	|_3_|	|_1_|	|_5_|	|_1_|	|_|
06	6/06/2010	|_0_|_|9_|	|_3_|	|_1_|	|_1_|	|_2_|	|_1_|

Id	NOTES
1	Sally is John's niece



After you finish this section, check if birth date is consistent with completed Age in the flap. Ensure this is done before you proceed to the next sections as there will be age limits that apply to certain sections (e.g., labor force age 15 years and above, educational status 3 years and above, and communication status 10 years and above).

4.4 Activities last week (15+ years)

4.4.1 Introduction

This section provides general instructions on how to fill in the labor force questions in Module 1. The section is divided into three parts:

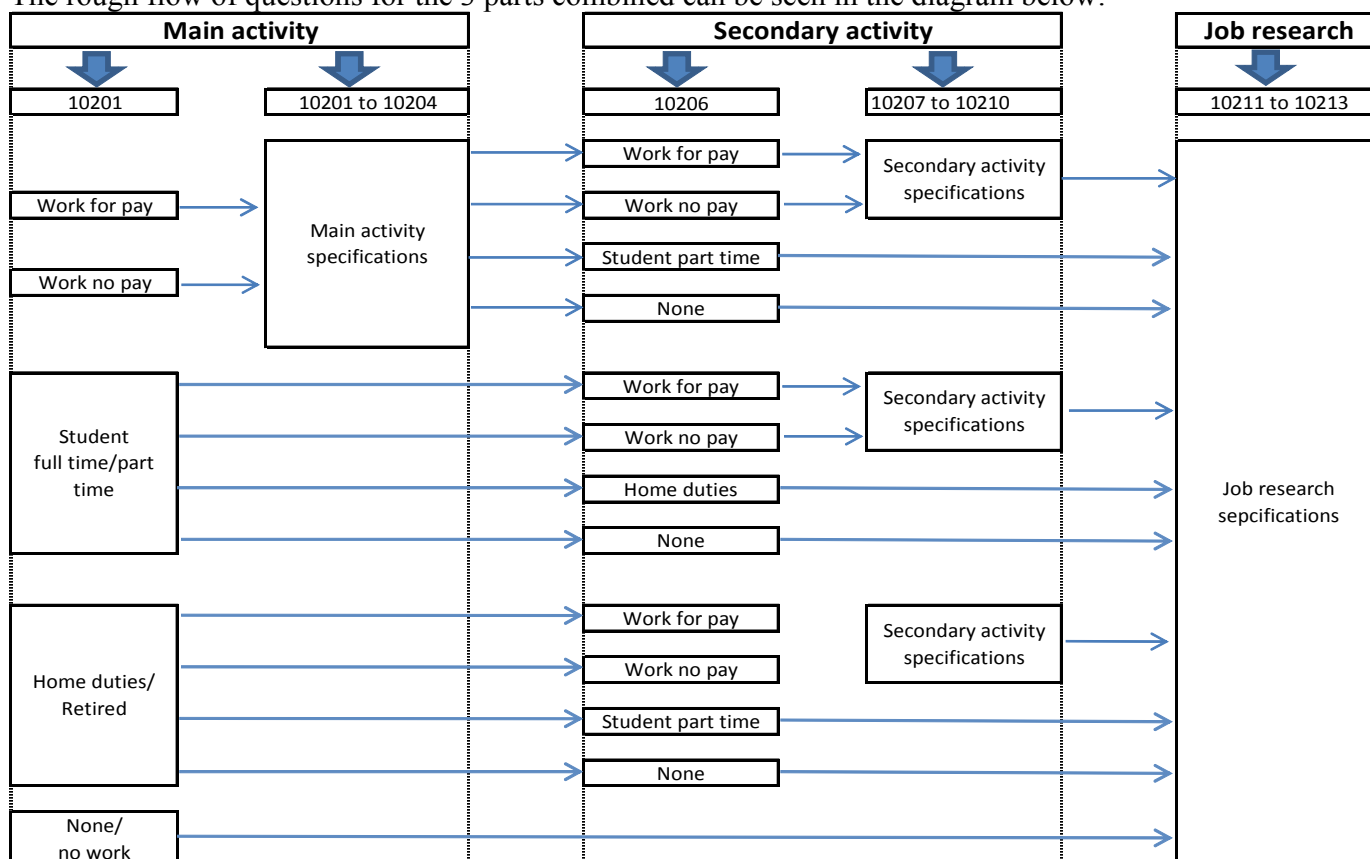
- Part 1 – Main Activity Section
- Part 2 – Secondary Activity Section
- Part 3 – Job Research Section

This information is only asked of household members 15 years and over. If a person is aged 14 or less, then leave the information for this person blank.



Before you start asking the questions, check the flap to identify persons below 15 years old (or 0-14 ages). In this section S1.2, X out the corresponding HM to avoid confusion when you conduct the interview. Do the same to the HM in the continuing pages for this section.

The rough flow of questions for the 3 parts combined can be seen in the diagram below:



S1.2 Activities last week (15+ years)

Reference Period:
Last week

Please provide the main activity details for every member of this household, aged 15 years and older.

[HM]	What was this [HM]'s <u>main activity</u> during last week ? (If away, due to holidays or illness, state what this person would normally be doing)	Main Activity Section				Obs
		Type of activity (occupation)	What industry did [HM] work in?	How many hours did [HM] work in this <u>main activity last week</u> ?	Would [HM] be willing and available to work more hours in this <u>main activity</u> ?	
		Examples nurse, teacher, enumerator, security, cook, shop-keeper, farmer, fisherman	Examples hospital, education, security, restaurant, retail sales, agriculture, fisheries	30+ hrs (▶ 10206) < 30 hrs (▶ 10205)	1=Yes / 2=No	
code10201						
	if 01 - 08: (▶ 10202)					
	if 09 - 12: (▶ 10206)					
	if 13: (▶ 10211)					
10101	10201	10202	10203	10204	10205	10299

Response codes for question 10201

Paid Employment

- 01. Employer
- 02. Self-employed (producing goods or services for sale, running a business)
- 03. Employee, working for wages / salary in public sector (incl. NGO, UN agencies)
- 04. Employee, working for wages / salary in private sector

Un-paid employment

- 05. Producing goods for own and/or family consumption (self-employed)
- 06. Unpaid family worker (family business/ plantation)
- 07. Unpaid family worker, help with basic household duties inside (washing, cooking, cleaning, etc) and outside (gardening, maintaining lawn, etc)
- 08. Volunteer work (community, church, etc.)

Not in the labor force

- 09. Student - full time
- 10. Student - part time
- 11. Retired
- 12. None – did not pursue any activity
- 13. Physically / mentally disabled

Indicates which question to go to based on what response is provided for that question

Detailed instructions for each question follow below.

4.4.2 Main activity section (10201-10205)

10201: What was this [HM] main activity during last week?

The first question asks each person 15 years and over what their main activity was last week. There is a prompt in *italics* for this question in case a person was away from their main activity due to holidays or illness. For these people, state what the person would normally be doing if they weren't on holidays or sick.

“Last week” refers to the week before interview week, when you actually conduct this interview. This reference period will vary as this survey spans over a 1 year period.

“Main Activities” in this instance includes persons 15 years and over:

1. who work for pay (*paid employment* or *in-kind payment*);
2. work without pay (*unpaid employment*); and
3. *not in the labour force*.



Note the preceding “code” before 10201 refers to the list of codes to be utilized. Note also the sequence guide and skips and carefully follow them for each group of codes 01-08, 09-12 and 13-14.

There are 14 response categories, with a short explanation of each being as follows:

01. **Employer:** Manages a private business and employs people in this business
02. **Producing goods or services for sale, running a business:** Own business, people working for themselves, without paying any extra staff. It can happen that a family member helps this person run the business, but for free. If they get paid then he/she is an employer (option 01).
03. **Employee working for wages in public sector:** People working for the government or public company (including NGO, UN agencies), paid on a regular base (weekly, bi-weekly, monthly).
04. **Employee working for wages for a private sector:** People working for a private person or a private company, paid with a regular salary (weekly, bi-weekly, monthly).
05. **Producing goods or services for own/family consumption:** A farmer, a fisherman, a livestock farmer who does not sell their production, they just use it to feed the family.
06. **Unpaid family worker (family business, plantation):** People who work for free in the family business, just to help the family
07. **Unpaid family worker (helps with basic household duties):** A person in the household who was brought-in (from other household) to do basic household duties (including baby-sitting, cleaning/washing, cooking, etc.). This excludes members of the core family who reside in the house as they will be categorised as 11.
08. **Voluntary work / community work (for free):** A person involved in church activities or community activities or any unpaid work for charity.
09. **Student full time:** A person fully dedicated to their study. Be careful if the interview takes place during school holidays, as this person should still be classified as a full time student.
10. **Student part time:** This status can be a main activity or a second activity. These people generally only spend half the time at school that a full time student does, and can often be working also.
11. **Home duties:** This category refers to the main persons in the household (hhhold head, spouse, children) responsible for taking care of the household (different from 07, as they just assist with home duties).
12. **Retired, too old:** Too old to be involved in any work activities - stays at home doing nothing.
13. **None – do not pursue any activity at all:** no work, no gardening..
14. **Physically/Mentally Disabled:** People who are bedridden or who are mentally/physically disabled and cannot perform duties as required for employment.

10202: Type of activity (occupation)

This question refers to the type of activity each [HM] undertakes in their main activity. It is often also referred to as the occupation. Only persons who reported they were working (categories 01-08 in Q10201) will be asked this question. Examples are given in the question which can be used as a guide. Note, for this question, we are not interested in what the business does that they work for, we are after their role in that business.

10203: What industry did [HM] work in?

This question refers to the industry the person works in, and is a follow up to the question on occupation. For this question we are after the activity of the business the person is employed in. Once again, examples are given in the question which can be used as a guide.

10204: How many hours did [HM] work in this main activity last week?

This question requires the household member to report how many hours they worked in their main activity last week. Make sure only the main activity detailed in Q10201 and Q10202 is included in calculating the number of hours. Make sure the sequencing is followed after this question as only those persons who reported working less than 30 hours in their main activity will be asked the next question (Q10205). People who responded they worked 30 hours or more will be sequenced/skipped to Q10206.

10205: Would [HM] be willing and available to work more hours in this main activity?

This question is only asked of persons who reported that they worked less than 30 hours in their main activity. A simple yes or no answer is all that is required for this question, record code – 1 for Yes or 2 for No.

4.4.3 Part 2: Secondary activity section (10206-10210)

10206: In addition to this main activity, did [HM] do any other activity paid or unpaid, even just for one hour?

This question is very similar in nature to question 10201, but collects details for each person's secondary activity. All people aged 15 and over will get asked this question, except those persons who responded they do no activity at all in question 10201. The categories outlined in question 10201 are the same for this question.

Please refer to the descriptions provided in question 10201 for more information about each of the remaining categories.

Remember to follow the sequence guide provided in this question, which directs persons who were coded 09-12 to question 10211.

10207: Type of activity (occupation)

This question refers to the type of activity each [HM] undertakes in their secondary activity. It is often also referred to as the occupation. Only persons who reported they were working (categories 01-08 in Q10206) will be asked this question. Examples are given in the question which can be used as a guide. Note, for this question, we are not interested in what the business does that they work for, we are after their role in that business.

10208: What industry did [HM] work in?

This question refers to the industry the person works in, and is a follow up to the question on occupation. For this question we are after the activity of the business the person is employed in. Once again, examples are given in the question which can be used as a guide.

10209: How many hours did [HM] work in this secondary activity last week?

This question requires the household member to report how many hours they worked in their secondary activity last week. Make sure only the secondary activity detailed in Q10207 and Q10208 is included in calculating the number of hours.

10210: Would [HM] be willing and available to work more hours in this secondary activity?

All persons who answered question 10209 will be asked this question, despite how many hours they reported working in their secondary activity. Simply record 1 or 2 in the box, for Yes or No response.

4.4.4 Part 3 – Job research section (10211-10213)

10211: Did [HM] actively look for work or for another job last week?

This question aims to determine if the individual actively looked for work or for another job in the last week. All persons are asked this question, even those who are in full time employment. The main aspect of this question is that the individual has to be actively looking for work, not just wanting work. Examples of actively looking for work include:

- Checking bulletin boards where jobs are advertised
- Following up to radio announcements/advertisements
- Following up to newspaper and tv advertisements
- Checking Facebook or web sites
- Checking State and National Government's Public Information (internet)
- Wandering around to shops/stores and checking employment opportunities

10212: Why not?

This question is only asked of persons who did not actively look for work or another job last week. The reason for this question is because we are trying to distinguish between persons who didn't look for work because they weren't interested, and those that didn't look for work because they believed there was none available and they were wasting their time. It is therefore very important the most appropriate response is provided to this question.

10213: Was [HM] available to work, or take on another job last week?

The final question for this section determines if the individual was available to work last week, had a job been offered to them. Record the Yes or No code, 1 or 2, in the box.

Example for (section) S1.2

[01] John: runs his own store, he is a store manager for 60 hours a week. He also spends some hours every day (around 10 hours in total a week) raising pigs for his family's consumption, and has no interest in pursuing other work activities because he already has a job.

[02] Mary: Her main activity is to look after the house, but she also spends around 15 hours a week making handicrafts to sell to make extra money. She does not wish to pursue other work activity

[03] Peter: Is a full time student but also goes fishing at least one day during the week after school, and one day on weekends (around 12 hours in total) to catch fish for the family. He is not interested in pursuing any other work activities at this stage

[04] Sarah: Is aged 14 so these questions are not applicable

[05] Roger: Is fully retired and not interested on undertaking any work activities.

[06] Sally: Is aged 4 so these questions are not applicable.

EXAMPLE: Filling in questions 10201 – 10205 (Main Activity Section)

[HM]	What was this [HM]'s main activity during last week ? (If away due to holidays or illness, state what this person would normally be doing)	Main Activity Section				Note
		Type of activity (occupation)	What industry did [HM] work in?	How many hours did [HM] work in this main activity last week ? (Include sick, annual and statutory leave)	Would [HM] be willing and available to work more hours in this main activity ?	
		Examples	Examples			
					1=Yes / 2=No	
	code 10201 if 01 - 08: (► 10202) if 09 - 12: (► 10206) if 13 - 14: (► 10211)	nurse, teacher, interviewer, security, cook, shop-keeper, farmer, fisherman	hospital, education, security, restaurant, retail sales, agriculture, fisheries	30+ hrs (► 10206) < 30 hrs (► 10205)		
10101	10201	10202	10203	10204	10205	10299
01	|_0_|_|1_|	shop manager	retail trade	|_6_|_|0_| hrs	|_2_|	|_|
02	|_1_|_|1_|	.....	.....	|_|_| hrs	|_|	|_|
03	|_0_|_|9_|	.....	.....	|_|_| hrs	|_|	|_|
04	|_|_|	.....	.....	|_|_| hrs	|_|	|_|
05	|_1_|_|2_|	.....	.....	|_|_| hrs	|_|	|_|
06	|_|_|	.....	.....	|_|_| hrs	|_|	|_|

EXAMPLE: Filling in questions 10206 – 10210 (Secondary Activity Section)

Secondary activity section						
[HM]	In addition to this main activity, did [HM] do any other activity last week paid or unpaid (even just for 1 hour) ?	Type of activity (occupation)	What industry did [HM] work in?	How many hours did [HM] work in this secondary activity last week ?	Would [HM] be willing and available to work more hours in this secondary activity ? 1=Yes / 2=No	Obs
	code 10206	Examples nurse, teacher, enumerator, security, cook, shop-keeper, farmer, fisherman	Examples hospital, education, security, restaurant, retail sales, agriculture, fisheries			
	if 01 - 08: (► 10207)					
	if 09 - 13: (► 10211)					
10101	10206	10207	10208	10209	10210	10299
01	| 0 | | 5 |	Pig Farmer	Raising Livestock	| 1 | | 0 | hrs	| 2 |	| |
02	| 0 | | 4 |	Make handicrafts	Handicraft production	| 1 | | 5 | hrs	| 2 |	| |
03	| 0 | | 5 |	Fishing	Fisherman	| 1 | | 2 | hrs	| 2 |	| |
04	| | | |	.....	.....	| | | | hrs	| |	| |
05	| 1 | | 1 |	.....	.....	| | | | hrs	| |	| |
06	| | | |	.....	.....	| | | | hrs	| |	| |

EXAMPLE: Filling in questions 10211 – 10213 (Main Activity Section)

Job research section				
[HM]	Did [HM] actively look for work or for another job last week ?	Why not?	Was [HM] available to work, or take on another job last week ?	Obs
	1 = Yes / 2 = No			
	if 1 (► 10213)			
	if 2 (► 10212)		code 10212	
10101	10211	10212	10213	10299
01	| 2 |	| 0 | | 2 |	| 2 |	| |
02	| 2 |	| 0 | | 3 |	| 2 |	| |
03	| 2 |	| 0 | | 1 |	| 2 |	| |
04	| |	| | | |	| |	| |
05	| 2 |	| 0 | | 3 |	| 2 |	| |
06	| |	| | | |	| |	| |

4.5 Educational status (3+ years)

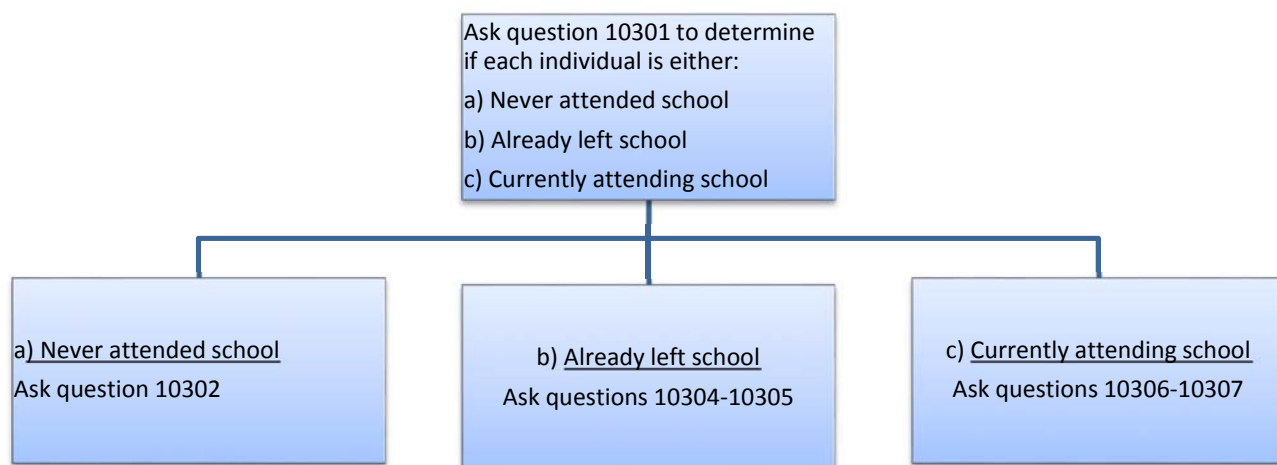
4.5.1 General purpose of question

This question for education aims to identify the education status of every individual aged 3 years and older in the household who were recorded in the flap.

In summary, every individual aged 3 and over can fall in to 1 of 3 categories:

- 1) Never attended school
- 2) Already left school
- 3) Currently attending school

It is very important the sequence guides are followed properly here to ensure the right questions are asked for each individual. The procedure for addressing this section is as follows:



4.5.2 Specific instructions for each question

10301: Have you ever attended a formal education institution?

The key aspect of this question is that the educational institution needs to be formal. In most cases this will be obvious if the person has attended any form of education at a recognized school (primary, secondary, etc.), but in some case it might not be so obvious. The best way to guide people on what constitutes a formal education is to provide example of what is included and excluded. Such examples are as follows:

Inclusions: Formally recognized schools (primary, secondary, etc.), university
Pre-school (head-start)

Exclusions: Home tutoring
Hairdresser course

10302: Why have you never attended school (main reason)?

This question is only asked of persons who reported they have never attended any formal schooling. The part in brackets is also important as there may be numerous reasons a person has reported never attending school, but we are seeking only the main reason, so be sure to enter one code only.

For persons of a young age (1-2 in particular), the main category should be “1.Too young”, whereas for older age groups the other 3 categories (2-4) should mostly apply.

In the case that category 4 is entered, please mark the “note id” column in 10399 for that person with a number identifier, and record the details in the “NOTE” box at the bottom of the page.

10303: Are you attending school now?

This question is a follow-up question for those who answer, “Yes” to question 10301.

10304: Why have you left school (main reason)?

This question is for persons who have attended school and have now left. It simply asks the questions as to why the person has left school. For the high proportion of respondents to this question, the answer will be “1.Completed desirable schooling”. Once again some people may have left for numerous reasons but you must only fill in the main reason, so enter only one code as a response for this question.

10305: What was the highest level or grade you have completed?

This question aims to determine what the highest level or grade of education has been achieved. The way this question is addressed will be different depending on the type of education they finally completed.

10306: What level or grade are you currently attending?

This question is a follow-up question for those who answer “Yes” to Q10303.

10307: Type of School

This question is self-explanatory and simply requests the type of school the student is currently attending whether it is government/public school, private or other.



Expense on Education will be covered in Module 3.

4.6 Communication status (10+ years)

4.6.1 General purpose of question

This question aims to determine individual (or persons) use of internet in the last month. Not all communication information are collected in this question as some are best collected at the household level and thus included in Module 2. For the communication collected from individuals (persons) in this module, two different recall periods are used for this question, depending on the information collected.

- 1) Source of internet access and use of cell phone → 1 month recall
- 2) Owning cell phone → No reference period

A few extra bits of information based on access to communication are also collected here.

4.6.2 Specific instructions for each question

10501 – Did [HM] use internet in the past month?

This question collects information on whether each individual in the household used the internet in the last month. The location of where the internet was used is not relevant to this question. If the household head is responding on behalf of other household members in this question it will be useful if they do confirm with each household member when responding to this question as well as the next 3 questions.

If the [HM] replies they used the internet, then proceed to the next question, otherwise skip to the next HM. Remember to enter a code for this question, 1 for yes, or 2 for no.

10502:10504 – What were the sources [HM] used for internet access?

The next three questions collect information on what sources of internet each individual used. The codes provided at the bottom of this table should be used to fill in these three questions. If the [HM] only used one source for accessing the internet in the last month, only the first question (10502) needs to be filled in. If more than one source was used to access the internet then list in the order of most commonly used sources.

		During the past month :			Note
[HM]	Did [HM] use internet?	Where did this [HM] access the internet?			
	1=Yes 2=No				
			code 10502-10504		
10101	10501	10502	10503	10504	10599
01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

code 10502-10504: Source of internet access

1. Home
2. Work
3. Village council office
4. Place of education
5. Another household
6. Mobile device (cellphone, i-pad, smartphone)
7. Other (Note)



Expense on Communication will be covered in Module 3.

4.7 Household members who left the household

4.7.1: General purpose of question

This question for persons who left the household is to aid capture of all the income and expense incurred on the households within the last 12 months period in modules 2-4. This is also where to identify the people who contributed to the household living condition within the period.

A lead in question is initially asked to determine if the household have any members in the last 12 months who are no longer members of the household because they moved away with no intention to return or if former member already died in the last 12 months. Record the answer, 1 or 2 (for Yes or No respectively) and follow the sequencing, or skip if the answer is 2 (No) and go to Module 2.

This list contains the following people:

- i) Persons who used to reside in this dwelling as their usual residence during the last 12 months, but have since left, with no intention of returning; and
- ii) Persons who used to reside in this household, but have passed away in the last 12 months.

There are 9 rows for recording persons who meet this criterion.

4.7.2: Specific instructions for each question

10602-Name of former household member

The name is only going to be used for monitoring or data processing and it is not to be released as individual data.

10603-Sex

Record the code for sex for the person. Utilize sex code list.

10604-Age

Record the complete age of the person. Age as of the date of interview. Enter the age accordingly in the allocated box. If the person has since passed away, enter the persons age at the time of their death.

10605-Contribute any income during their stay within this household?

Record code 1 or 2 (Yes or No) based on the response and follow the skip if response is 2 (2=No), then skip to 10607.

10606-What main paid activity did this person do?

Utilize the code list below for 10606-type of work. Only use one answer option. Type of work refers to the work they did that they received income from. If more than one job/business, record the work/job that provided most of the income.

10607- Incur any major personal expenses while with household (HH)?

Record code for Yes or No (1=Yes or 2= No) and follow the skip if the response is 2-No, go to Module 2.

10608-What was the main expense incurred by this persons?

If the response to 10607 is 1 (Yes) then this question is ask to record the type of expenditure that the individual spent the highest on. Utilize the code list below for 10608-type of expenditure.



Expenditure and Income Amount reported here will be covered or reported in the following Modules.

10609-How many months did [HM] stay in the HH over last 12 months?

For this question simply record the number of months the person was staying with the household over the last 12 months. Round this figure to the nearest month value – e.g., if it was 4 months and 1 week, simply round to 4 months.

PART 4: GENERAL GUIDELINES FOR COMPLETING MODULE 2

4.1 Introduction

Module 2 – Household Expenditures - as its name suggests, focuses on collecting data on expenditures which are best collected at the household level. The sections addressed in this module cover the following topics:

1. Housing characteristics
2. Housing Tenure
3. Utilities & Communication
4. Land & Home
5. Household Goods & Assets
6. Vehicles & Accessories
7. Private Travel
8. Household Services
9. Contribution to Special Occasions
10. Provisions of Financial Support
11. Loans
12. Household Assets Insurance & Taxes
13. Personal Insurance

The approach for tackling the instructions to this module is divided into 5 sections:

Section 4.1: The introduction which you are reading now

Section 4.2: Details on how to fill in the section on “Dwelling Characteristics (S2.1)”

Section 4.3: Details on how to fill in the section on “Dwelling Tenure (S2.2)”

Section 4.4: Details for filling in the sections which cover expenditure on “Utilities & Communication (S2.3)”, “Land and Home (S2.4)”, “Household Goods & Assets (S2.5)”, “Vehicles & Accessories (S2.6)” and “Private Travel (S2.7)”

Section 4.5: Details for filling in the sections which cover expenditure on “Household Services (S2.8)”, “Contributions to Special Occasions (S2.9)”, “Provisions of Financial Support (S2.10)”, “Loans (S2.11)”, “Household Assets Insurance and Tax (S2.12)” and “Personal Insurance (S2.13)”

These sections were grouped this way as it was felt the manner in which the information for each section was collected was similar.

4.2 Housing characteristics

4.2.1 Introduction

This section provides instructions on how to fill in the questions that identify the dwelling structure and facilities of the dwelling with respect to electricity, water and sanitation. There are 5 different components to this section which cover the following:

- 2.1.1: Description of housing
- 2.1.2: Electricity/Energy
- 2.1.3: Water and sanitation access / use
- 2.1.4: Communication access

Detailed instructions for each question of these components are provided below.

Section 2.1.1: Description of housing (20111-20117)

FOR EACH OF THESE QUESTIONS, ONLY 1 ANSWER OPTION SHOULD BE MARKED AND ENTERED IN THE BOX

20111: What type of living quarter (main house) is this?

The interviewer can once again provide the answer to this question based on observation, but clarification can always be sought from the household head. There are seven main options provided for this question, of which only one can be ticked. A brief description of each is as follows:

1. One family house detached from any other house: This housing type will be the most common and represents a building that is not attached to any other building for which the household resides.
2. One family house attached to one or more houses: This housing type is similar to the first category with the main difference being the house shares a wall with one or more other houses.
3. Building with 2 or more apartments: This housing type refers to a block of apartments.
4. Building with 2 or more households sharing kitchen/toilet: This housing type, as its name suggest, occurs when 2 or more households lives in the same housing structure each bearing its own economic burden, the only thing they share are the kitchen and toilet facilities.

The difference between this option and option 2 was: The units in option 2 shared a wall but each has its own toilet/kitchen.

5. Building attached to a business/other non-residential building: This housing type, as its name suggests, will occur if it shares a common wall with a store/shop.
6. Other (note): Any kind of living quarter not fitting to those above. Examples are the multiple-house households - a household that is spread over more than one building or structure.

The main house refers to the building in which the people in this household sleep.

20112a – 20113 - 20114: What is the main material used for the Roof/Walls/Floors?

The answers to these questions can be filled in by observing the house yourself, or by asking the household head.

1. “Concrete”: The main material used is made of cement – poured concrete or cement blocks.
2. “Corrugated/iron”: As the name suggests, the main material is metal or tin.
3. “Wood”: Main material used is made of wood, e.g., plywood.
4. “Thatched/traditional”: All types of thatching – coconut leaves, thatch or any other natural leafy material.
5. “Coral/gravel”: As the name suggests, coral, gravel or material of similar nature is mainly used.
6. “Other (note)”: This option is used in case of the main material not among the types listed above. Always provide a brief description of what that material was or can be “none” if no permanent walls exist. An example of this would be a family summer house without wall that is used for sleeping space.

If more than one material is used, then only tick the box of the material which is most prevalent. In the case that two materials were used equally, tick the box of the item which appears on the answer options list first.

20112b What is the colour of the house roof?

Tick here the main colour of the house roof, if you are not sure, write the colour in the note box.

20112c – What is the house roof insulation material?

Ask the household head what the roof insulation is from: batts, blown, spray foam, other or none.

20115: How many rooms does your household occupy?

Rooms in the context of this question refer to places where a person can sleep or eat. It does not refer to bathrooms or toilets. In order to be qualified as a room, the space needs to be enclosed by walls. Count bedrooms, kitchens, living rooms, dining rooms, studies.... Do not count bathroom, showers, toilets, laundries, hallways or pantries.

Note:

- Count open plan rooms like this: kitchen, lounge and dining = 3 rooms.
- The room does not need walls that go right from the floor to the ceiling of the house.
- A room which has been split into 2 areas by a curtain should only be counted as one room.

20116: When was the building constructed?

Year main building first constructed is the year in which the main building structure was first built. It is not asking about the year(s) where additions or renovations may have taken place.

Situations will arise when the household head or respondent is not able to provide an accurate answer for this question, especially in cases of renters. In these cases, encourage the household head to provide a best guess as to when the building was constructed. If they have no idea at all, enter “9999” in the box.

20117: Do this house has a designated area specifically for cooking?

This question aims to determine if the household has a designated area in the house for cooking. The cooking area does not have to be a physically enclosed room to be considered a cooking area. It can be partially open space or even just a corner of a room with permanent counters on top of which are cooking appliances and a sink and a fridge beside it.

- “Inside”: Location of cooking area is inside. The modern houses nowadays would fall under this category.
- “Outside”: Location of cooking area is outside. It is when the cooking area is another house separated from the main house. The cooking house can be enclosed on all sides, partially enclosed, or open on all sides.
- “Inside and outside”: As the name suggest, the household has cooking areas both inside and outside.
- “No designated cooking area”: If the household has no permanent cooking area, then choose this answer option. A household with just a kerosene stove, which they take out to the veranda to cook their food and return it to the corner afterward is considered to have no designated cooking area.

Section 2.1.2: Electricity / Energy (20121-20127)

The purpose of these questions is to establish the proportion of the households connected to electricity services of the public utility system. Furthermore, they will be used to establish the energy source most used for lighting and cooking. Lighting is one of the basic needs of households so it is important that we gauge the lighting sources households are accessible to.

20121: Does this house have access to electricity from the public utility grid?

For this question, note the responses by placing a “X” in the appropriate box. All respondents should be sequenced to the next question regardless of how they respond to this question.

20122: Does this house have access to another electricity source?

This question intends to identify if the household accessed other alternative electricity sources. Once again, note the respondent’s answer by placing a “X” in the appropriate box, and pay attention to the “Go to 20124” instruction should the respondent answered “No”.

20123: What is the alternative electricity source this house has access to?

This question intends to identify the type of alternative electricity sources the household has access to. Most houses have only 1 alternative power source so that would be easy to determine which answer option to select. But situations will arise where more than 1 alternative source is used - when this happens, mark the highest rank on the answer options list.

For example, if the respondent says they use both a private generator (for their appliances) and solar panel (for their lights), you should note private generator as their answer since it tops the list and enter “1” in the box.

20124: What is the main source of lighting used by this household?

Only the main source of lighting should be obtained for this question. Most people will be connected to the main electricity supply, so answer option 1 will be frequently selected. Households with answer option 1 will rely on other sources for lighting during power outages, in such cases assume power is operational on island when choosing the answer for this question. If the household responded they used two sources equally, select the one ranked highest on the list.

Always provide an observation for the “other” category.

20125: What is the secondary source of Lighting used by this household?

Quite often households rely on more than one source for lighting, this question asks for the secondary source used. If the household responded they used two sources equally, select the one ranked highest on the list.

Once again, remember to provide an observation when “other” category is used.

20126: What is the main cooking facility for this household?

Only the main cooking facility is required for this question. If the household uses different types, only record the most commonly used. In the case that two or more cooking facility types are used equally, record the one ranked highest on the list.

1. “Electric range”: Electric appliance for cooking food, equipped with surface elements (hot surface or grilles) and an oven.
2. “Portable electric stove”: As the name suggests, this can be easily moved around. Examples include portable hotplates and cook tops.
3. “Microwave”: Cooking using a microwave oven.
4. “Gas stove”: Stoves that use cooking gas falls in this category, including range-oven combination type or portable type.
5. “Kerosene stove”: Stoves that uses kerosene falls in this category, including range-oven combination type or portable type.

6. “Wood stove”: A wood-burning stove used for cooking. It is a small enclosed structure with a smoke vent and a front opening where wood is fed thru to fuel it. These are mostly local-made but could be imported as well.
7. “Open fire”: As the name suggest, this is not a “constructed” enclosure of any kind. It is open to elements. Examples include using of rocks, welded-rebar stoves or tire rims.

Once again, remember to provide an observation when “other” category is used.

20127: What is the secondary cooking facility for this household?

Households often use more than one source facility for cooking, this question asked for the secondary source used. If the household responded they used two sources equally, select the one ranked highest on the list.

Once again, remember to provide an observation when “other” category is used.

Section 2.1.3: Water and sanitation use/access (20131-20134)

20131: What are the main and secondary sources of water used by this household for drinking, cooking, and cleaning (laundry and dishes)?

For this question, cleaning refers to clothes (laundry) and dishes (washing up). 8 options are provided. Simply write the correct code in the appropriate box based on the answer given by respondent

1. Community water supply: Water from public utility water supply or the community water supply.
2. Private household tank: Household rainwater catchment (tank/cistern).
3. Water tank shared with other households: arrangement between different households.
4. Protected dug well: A dug well that, by the nature of its construction, is protected from the elements of contamination. For example, the top opening has a cover and its walls are “lined” to prevent contamination from fecal matter. Wells that are open to elements are not improved sources.
5. Bottled water: Any drinking water bought from stores or companies that sell drinking water.
6. Ocean sea water: If household members use the ocean to bathe each day, then mark this option in the next question (20132).
7. Other: (Note).
8. None: cannot be used for drinking water as the question asks the main source of drinking water (i.e., can only be a response for response to secondary).

Every household should have a MAIN source of drinking water – no one can live without water. So the entry for the “main” box can be 1 to 7, but never 8. Option 8 for drinking water can be used only for secondary.

Cells should not be left blank as the option none (8) should be filled in.

20132: What is the household’s main source of water for personal bathing?

ONLY one answer should be recorded from the 5 possible options:

1. Private shower facility inside the house: the bathroom is inside the house.
2. Private sower facility outside the house: bathroom outside the house.
3. Shower facility shared with other household(s): share the bathroom with another household(s).
4. Ocean, sea water: the household mainly bathes in the sea.
5. Other (note): do not forget to specify the other in the note box using a id not as a reference.

20133: What are the main and secondary sources of sanitation facilities used by this household?

The final question of this section asks for both the main and the secondary type of toilet facility household members uses. 7 options are provided for this question. Simply insert the answer option provided in the appropriate boxes.

Again, every household should have a MAIN source of sanitation – so this box should be filled in with option 1 to 6. The secondary box may be filled in with 7 in some cases, especially if the household reported to have no sanitation system.

The source options include:

1. Private tank flush inside the house
2. Private tank flush outside the house
3. Tank flush shared with other households
4. Latrine
5. Ocean
6. Other (note): Any type not mentioned above. Remember to include an observation on the details.
7. None

Section 2.1.4: Communication access (20141-20148)

20141: Did this house have access to a landline phone connection?

Write the correct answer in the appropriate box and note the “Go to 20145” instruction should household responded “No” to this question.

20142: Is this landline connection operational at the moment?

Write the correct answer in the appropriate box.

20143: Does your house have a wired connection for internet access?

Write the correct answer in the appropriate box and note the “Go to 20145” instruction should household responded “No” to this question.

Please note that a landline phone is necessary to enable internet access via dial-up or broadband, so always refer back to Q20141 after the household provide their answer for this question.

20144: What type of wired connection do you have access to?

In Tokelau there are only two types of wired connection:

1. Dial –up connection; and
2. Homenet (cable or wifi).

Simply place the number for the response in the box.

20145: Does this household have access to a wireless internet connection?

Simply write the correct answer (1 or 2) in the appropriate box and note the “Go to S2.2” instruction should household responded “No” to this question.

If a household **actually** have the means to connect to the internet, such as laptop, mobile phone, etc., which has a wireless feature to access the internet then it is considered to have “access”. If a household is in an area

with signal distance or a network tower but doesn't have a means of access then it is considered not to have access.

20146: Who's the provider (source) of wireless internet access to this household?

For this question, two options are available:

- 1) Teletok; and
- 2) Other (note).

Simply record the number in the box provided which best describes the wireless option accessed.

4.3 Housing tenure

4.3.1 Introduction

This section provides instructions on how to fill in the section on housing tenure expenditure. The section has 3 components.

- 2.2.1 – Details of the house in which you live;
- 2.2.2 – Details of other house in which you own; and
- 2.2.3 – Details of payments for houses owned by another household.

Detailed instructions for each question of these components are provided below.

Section S2.2.1: Details of the house in which you live (20211-20217)

20211: For this house in which you live what is the tenure status for this household?

Housing tenure refers to the conditions under which the household members are residing in a house (e.g., own house, renting, etc.). There are four main options, and they are provided below with a brief description. All houses selected in the survey must belong to one of these categories.

1. Renting the house - with landlord charges: household lives on rental basis and member(s) of the household pay(s) a rental fee. The rent can be deducted from the salary if the employer owns the house (government, private company, NGO, or Church).
2. Live in the house for free - house provided for free by the employer: household lives in the house on rental basis but does not pay any rental fee. If the house is provided for free by the employer, there is no deduction on the salary.
3. Live in the house for free - house provided by other (relatives, friends): household lives in the house on rental basis but does not pay any rental fee.
4. Own house outright: a member of the household owns the house free of mortgage/loans.
5. Own house with a mortgage: a member of the household owns the house, and the mortgage/loans on the house is not paid yet (i.e., still paying mortgage).

If a homeowner has migrated overseas and have arranged for friends or relatives to live in his house, this cases belongs in category 3 above. If the house belongs to the employer, interviewers need to know whether or not a rent is deducted from the salary (if yes, category 1, if not, category 2). If your family pays the rent (another household pays the rent) the appropriate category is 3. If the employer pays the rent, the appropriate category is 2. Only 1 answer is required. Simply place the number denoting the response in the box. Take care in following the "Go to" instructions for each of the responses to avoid asking inappropriate questions.

20212: How much do you pay monthly for the rent?

This question is only be asked if the house is rented (response to the previous question is 1). If the rent is sponsored and the household only paid a part of it, write this part paid by the household (and not the full rent). Only the household contribution to the rent is expected in this question. Mind the “Go to 20221” instruction for this question.

20213. Do you pay?

This question will help to find out the full amount of the rent (the real rent). There are two options:

- The full rent: the amount declared in 20212 (charged to the household) is the full rent, meaning that the household pays the full rent.
- Part of the rent: the amount declared in 20212 is a part of the rent, the full rent is higher and the other part is paid by the employer or relatives.

20214. What is the full rent of this house (or estimated if you do not pay the full rent)?

This question is only asked to know the real value of the monthly rent in the case of the household does not pay the full rent. If the household pays only a part of the rent and does not know the full rent, provide estimation (the amount declared must be higher than the one reported in 20212).

20215. Who is helping for the other part of the rent?

This question is asked to know who is helping this household to pay the rent of the house they live in. 3 options are possible:

1. Your employer: the employer of one of the household member pays a part of the rent;
2. Family, relative: some relatives/friends of one household member pay a part of the rent; or
3. Other: write a note to describe the situation (note box and note id).

20216. Do you receive a housing allowance from your employer to pay for the rent?

In some cases employer might help their employee to pay their rent paying them a housing allowance (in addition to the salary). This housing allowance paid by the employer has to be declared in this question.

IMPORTANT: IF A HOUSING ALLOWANCE IS PAID BY THE EMPLOYER TO A HOUSEHOLD MEMBER, REMEMBER TO DECLARE THIS AS INCOME IN MODULE 4 (40108).

20217. If you receive a housing allowance, how much is it monthly?

Declare the amount receive as housing allowance paid monthly by the employer (fortnight payment have to be doubled up).

End of the tenure question for the tenant (renting with charge).

Example rental contribution:

Rent charged by landlord: \$500 per month

Scenario1: employer pays \$250 of the rent directly to the landlord

Scenario2: employer pays to the household a housing allowance, \$500 monthly

Scenario3: employer paid to the household a housing allowance \$700 monthly

Scenario4: the family pays the rent for the benefit of the household

Question	Scenario 1	Scenario 2	Scenario 3	Scenario 4
20111	1	1	1	3
20212	\$250	\$500	\$500	Na
20213	2	1	1	Na
20214	\$500	Na	Na	Na
20215	1	Na	Na	Na
20216	2	1	1	Na
20217	Na	\$500	\$700	Na

20218: How much would you expect the monthly rent to be if you were to pay?

This question is only asked if the house is rented without landlord charges (response to 20211 is 2 or 3). Simply enter the amount provided in the boxes and follow the “Go to 20223” instruction. A rough guess by the respondent will be sufficient for this question and the interviewer can assist with this assessment if it is considered appropriate.

20219: How much would you expect to receive each month for this house, if you rented it to someone else?

This question is only asked if the house is owned outright by a household member (response to 20211 is 4). Simply enter the amount provided in the boxes and follow the “Go to 20223” instruction. Once again, a rough guess by the respondent will be sufficient for this question and the interviewer can assist with this assessment if it is considered appropriate.

20220-20222: These questions are asked only if the house is owned with a mortgage (i.e., response to 20211 is 5).

20220: How often do you make payments on this mortgage/loan? (tick one box)

Only two options are provided for this question (bi-weekly or monthly) so mark the box which is most applicable.

20221: How much do you pay each period?

Simply enter the amount in the boxes provided and proceed to the next question.

20222: How much would you expect to receive each month for this house, if you rented it to someone else?

Simply enter the amount in the boxes provided then follow the “Go to 20223” instruction. Once again, a rough guess by the respondent will be sufficient for this question, and the interviewer can assist with this assessment if it is considered appropriate.

Section S2.2.2: Details of other houses in which you own (20221-20223)

This section determines if household members own any other houses besides the one they presently live in, and if there is, asks for an estimate of how much the house would be worth if they were to rent it for income. If the household rents out a secondary house then this income will be collected in Module 4 on income. However, if a household member owns a secondary house which they don’t rent out, then we wish to measure how much rent the household could have collected if they did indeed wish to rent it out. There are three questions used to establish this, the first which determines if any household member owns another house. The second question then asks if any of these secondary houses are not being rented out, and if so, the third question then determines what the rental could have been if it was rented.

20223: Apart from this house where you live, does any member of this household own another house rented out for income?

This question allows identifying if ('Yes' or 'No') the household owns another house rented out for income. It could be the case that many houses are rented out (at least 1 household member owns). There are 4 options:

1. Yes within Tokelau: the rented out house(s) they own is located in country (same island or not);
2. Yes overseas: the rented out house they own is located overseas (Samoa, NZ....);
3. Yes within Tokelau AND overseas: the household rents out at least 2 houses; or
4. No: they do not own another house they make money with.

DON'T FORGET TO REPORT THE RENT THEY EARN IN THE INCOME SECTION MODULE4 (SECTION 4.7)

20224: Apart from this house where you live, does any member of this household own another house used as a secondary house (available for week end or vacation)?

In this case, the house they own is available, might be inhabited or not, but the household owns it and they do not make money renting it out.

Same options as 20223.

If option 1, 2 or 3 is selected, go to the 20225 question to declare the estimated amount of income that would be earned from this/those secondary houses if they were rented.

20225: How much would you expect to receive each month for this house if you rented it to someone else?)?

Enter the amount in the boxes provided. Provide this figure for all other houses, members of this household own, if they are not being rented out for money.

Section S2.2.3: Details of payments for land & houses owned by another household (20231-20235)

The questions in this section collect payment information made by household members for any other house owned by another household. An example of this may be a household member paying part of the rent of his daughter's apartment (in country or overseas). There are only 2 options available for this section which cover household members either assisting another household with their rental payments.

20231: Does any member of this household pay the rent for another household?

Simply "X" the box that applies. And note the "Go to 20233" instruction should household responded "No" to this question.

20232: How much do you pay each month for this house of another household?

Simply enter the amount in the boxes provided.

4.4 Utilities and communication

4.4.1 Utilities and communication details (S2.3.1)

This section is divided in 2 sub section:

S2.3.1: Utilities and communication details

S2.3.2: Utilities and communication expenditure

The first Section 2.3.1 is designed to identify the type of expenditure incurred by the household during the past month / 12 months (S2.3.1 - left page). The layout of the questions is different from the previous section. The questions are organized in a tabular form. As such the format for addressing the questions in this section is to tackle each page separately in a sub-heading, and focus on the key issues associated with that section.

Each of these sections/topics have:

- 1) A main question - identifies the general type of expenditure of section and reference period for expenses, emphasizes that the expense of interest is not limited to those benefitting the members within the household but also those incurred for (members of) another household, and further emphasizes that expenses for “business” use should be exclude.
- 2) A lead in question – identify if the household spend on the items listed. The lead question is slightly different for each topic as the nature of the expenditures differs. The lead in questions for each section are as follows:

20302: *During the last 12 months who paid for?* (Answer required / blank not allowed): expenditure can be made for the benefit of this household or another household, related to the following list of options:

1. The interviewed household (if so, specify the expense in S.2.3.2)
2. Another household paid
3. The owner of the house (for tenants)
4. The employer (if so, specified in Module 4 income in kind)
5. The Government - provided for free
6. Another organisation - provided for free
7. Not used or accessed
8. Other (note)

20301 to 20305:

The question is divided into 7 sections, 6 which relate to utilities and 1 which relates to communication. For each section, different expenditures are requested, covering:

11 – Prepaid meter or token

This category covers payments made by a household member for cash power. The expense for a 1-month period is requested.

12 – Other Electricity related fees (connection/reconnection/relocation)

This category covers any other electricity-related payment made by a household member such as connection, reconnection, and relocation fees. The expense for a 1-month period is requested.

21 – Generator fuel: Diesel Fuel

Only diesel which is purchased as fuel for a generator should be recorded here. Expenses for a 1-month period are requested.

22 – Generator fuel: unleaded petrol

Only gasoline which is purchased as fuel for a generator should be recorded here. The expense for a 1-month period is requested.

23 – Other Generator fuel: Liquid Propane Gas (LPG)

Only LPG which is purchased as fuel for generator should be recorded here. The expense for a 1-month period is requested.

31 – Gas or Liquid fuel used for cooking: Butane or LP gas

This can cover the small canisters which are disposable, or re-fills of the large bottles. The expense for a 1-month period is requested.

32 – Gas or Liquid Fuel used for cooking: Kerosene

This item will cover the kerosene bottles which can be purchased from any store. The expense for a 1-month period is requested.

33 – Gas or Liquid Fuel used for cooking: Other

Most households will only have butane gas or kerosene for cooking, but if a household does report purchasing a different type of gas or liquid fuel it should be recorded here. Always remember to include an observation of this item. The expense for a 1-month period is requested.

41 – Solid fuel used for cooking: coconut husks

This item covers coconut husks which households may purchase for cooking purposes. The expense for a 1-month period is requested.

42 – Solid fuel used for cooking: Charcoal

This item covers bags of charcoal, either imported or locally produced, which households may purchase. The expense for a 1-month period is requested.

51 – Communication Related Expenses: Landline telephone bill

This is the **monthly** landline telephone bill. It includes the rental of the telephone unit plus all call charges associated with the use of unit, including overseas call.

52 – Other landline telephone costs

This item covers any landline telephone costs such as connection fee, relocation fee, etc. The expense for a 1-year period is requested.

53 – Communication Related Expenses: Internet connection via Dialup/Homenet

This item covers any payment household members have made for an internet connection via Dialup or Homenet.

54 – Communication Related Expenses: Internet connection via WiFi

This item covers any payments household members have made for an internet connection thru WiFi.

55 – Communication Related Expenses: Online Subscriptions

This item covers any payments household members have made for online subscriptions for movies, games, software, etc. The expense for a 1-month period is requested.

56 – Communication Related Expenses: Cable TV subscription

If a household member pays for cable TV for the house they live in, or another house, then it should be recorded here. This includes both physical and wireless connection. The expense for a 1-month period is requested.

20305 – Period of payment:

For monthly expense items, commonly households would report the expense incurred in the past month. However, there will be cases where the households didn't incur the expense in the past month. In such cases, the usual or average monthly amount is acceptable.

For annual expenditure, sum up all the expenditure incurred during the past 12 months if the same expenditure occurred several times.

Example S2.3.1: Utilities and communication details

In this example it can be seen that in the last month the household:

- Paid the electricity prepaid meter/or bill.
- Purchased unleaded petrol for generator.
- Purchased gas for cooking.
- Paid the telephone bill for this household and another household (parents)
- The last 12 months:
- Paid some telephone connections fees

				Reference period last month	Reference period last 12 months
Line no.	During the last 12 months who paid for ? 1. The interviewed household (if so, specify the expense in S.2.3.3) 2. Another household paid 3. The owner of the house (for tenants) 4. The employer (if so, specified in module 4 as income) 5. The Government - provided for free 6. Another organisation - provided for free 7. Not used or accessed 8. Other (note)	Expense code	Services description	Period of payment	NOTE ID
20301	20302	20303	20304	20305	20349
1 - Electricity from public utilities					
01	1	11	Prepaid meter or token	1 month	<input type="checkbox"/>
02	7	12	Other (note)	1 month	<input type="checkbox"/>
2 - Generator fuel					
03	7	21	Diesel fuel	1 month	<input type="checkbox"/>
04	1	22	Unleaded petrol	1 month	<input type="checkbox"/>
05	7	23	Other (note)	1 month	<input type="checkbox"/>
3 - Gas or liquid fuel used for cooking					
06	1	31	Butane or LPG	1 month	<input type="checkbox"/>
07	7	32	Kerosene	1 month	<input type="checkbox"/>
5- Communication-related expenses					
11	1	51	Landline telephone bill	1 month	<input type="checkbox"/>
12	1	52	Other landline telephone costs (connection fee etc)	1 year	<input type="checkbox"/>
13	7	53	Home internet via dial-up/homenet	1 month	<input type="checkbox"/>

None of these cells are left blank. All filled in with the appropriate code 1 to 8.

If 8 is reported, make a note using the Note Id column

4.4.2 Utilities and communication expenditure (S2.3.2)

S2.3.1 and S2.3.2 are related as each item (expense code) paid by the household (Column 20302 = 1) has to be specified in S2.3.2.

Key rule

Each answer of '1' in section S2.3.1 (question 20302) is related to at least one row in the section 2.3.2.

The same answer '1' in S2.3.1 can lead to multiple expenditure identified in S2.3.2 (e.g., I pay electricity meter for my main house, the house of my relatives and my secondary house = 3 expenditures on electricity meter)

20352 - Expense code

This is the code which should be entered for the "expense code" in the expenditure part for each section. It refers to column 20303 from S2.3.1. The possible codes are the following:

- 11. Refers to prepaid meter
- 12. Refer to other electricity fee
- 21. Refers to fuel for generator – diesel
- 22. Refers to fuel for generator – petrol
- ...
- 57 refer to any other communication expenditure

Codes 13, 14, 25 are not possible, for example.

Key rule

The details of utilities and communication expenditure have to be specified following the reference period. Expense code 11, 12, 21, 22, 23, 31, 32, 33, 41, 42, 51, 53, 54, 55, 56 = 1 month (section 1 month at the top - line 1 to 15)

Expense code 52 and 57 = 12 month/1 year (section 1 year at the bottom - line 16 to 20)

20353 - Detailed description

The expense code discussed above will give some indication as to what the expenditure was for, but we are often after more detailed information for each expense. For that reason a question providing a more detailed description of each expenditure is sought. Some examples may be as follows:

Example: Detailed expense description

Expense code	Detailed description
11	Purchase cash power for a month
12	Connection fee for electricity
56	Payment of cable TV subscription for March
51	Payment of the land line phone subscription March

20354 - Beneficiary

All the expenditure listed in this section could be paid for the benefit of another household. This might represent support to family or friend, providing them with a financial support.

Example:

- I pay the power meter fee for my parents (who live in another household)
- I bought some fuel for the generator of my neighbors....

Each payment made for the benefit of another household has to also be specified in this section and the beneficiary has to be properly reported:

- Beneficiary 1 = this household
- Beneficiary 2 = another household

20355 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. The amount paid should be entered separately for each different expenditure item identified in the previous question.

Situations may arise where the household has more than one expenditure for the same expense code during the recall period. If this situation arises, every effort should be made to record each expenditure separately for this household. For example, if 2 prepaid meter were paid by household members during the last month, one for this household and one for the benefit of another household, then record the expenditures of each prepaid meter separately (2 lines).

All expenditure related to expense code 11, 12, 21, 22, 23, 31, 32, 33, 41, 42, 51, 53, 54, 55, 56, have to be tailored for 1 month (based on 30 days in a month).

- The household pays \$30 per week on power meter
⇒ \$120 MONTHLY has to be reported in 20355
- The household pays \$10 every 4 days on diesel fuel for generator
⇒ $\$10 * (30/4) = \75 MONTHLY

All expenditure related to expense code 52, 57 have to be annualized (365 days, 12 months, 52 weeks):

- The paid 2 times connection and re connections fees for the land line phone in the past 12 months
 - The first time they paid \$50 (10 months ago)
 - The second time they paid \$50 (3 months ago)⇒ In total they paid \$100 ANNUAL to be reported

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the “total amount” box. In other word, the total box should never be left blank.

The “total amount” box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the pacific that purchases are made on credit with the payments made at a later date. For these situations, it doesn't matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20356 - Location of provider

Location of provider refers to the physical location of the vendor from which the goods/service was obtained. This information is important to enable Balance of Payment analysis of the survey data. The two options for location of provider are:

1. Tokelau – Goods/service providers that are located in Tokelau.
2. Samoa – Goods/service providers that are located in Samoa.
3. Outside Tokelau/Samoa – goods services providers that are located elsewhere or on the Internet.

Example S2.3.2: Utilities and communication expenditure

In this example it can be seen that in the last month the household:

- Paid \$60 for their own consumption of power meter (spend in country)
- Paid \$20 for their own consumption of petrol for generator (spend in country)
- Paid \$30 for their own consumption of gas for cooking. (spend in country)
- Paid their land line telephone bill \$40
- Paid the land line telephone bill for their parents (another household) \$30

In the past 12 months:

- Paid \$100 for their telephone connections fees

S2.3.1 UTILITIES AND COMMUNICATION DETAILS						
Line no.	During the last 12 months who paid for ? 1. The interviewed household (if so, specify the expense in S.2.3.3) 2. Another household paid 3. The owner of the house (for tenants) 4. The employer (if so, specified in module 4 as income) 5. The Government - provided for free 6. Another organisation - provided for free 7. Not used or accessed 8. Other (note)	Expense code	Services description	Period of payment	NOTE ID	
20301	20302	20303	20304	20305	20349	
1 - Electricity from public utilities						
01	1	11	Prepaid meter or token	1 month		
02	7	12	Other (note)	1 month		
2 - Generator fuel						
03	7	21	Diesel fuel	1 month		
04	1	22	Unleaded petrol	1 month		
05	7	23	Other (note)	1 month		
3 - Gas or liquid fuel used for cooking						
06	1	31	Butane or LPG	1 month		
07	7	32	Kerosene	1 month		
5- Communication-related expenses						
11	1	51	Landline telephone bill	1 month		
12	1	52	Other landline telephone costs (connection fee etc)	1 year		
13	7	53	Home internet via dial-up/phonenet	1 month		

None of these cells are left blank. All filled in with the appropriate code 1 to 8.

If 8 is reported, make a note using the Note Id column

S2.3.2 UTILITIES AND COMMUNICATION EXPENDITURE						
Line no.	EXPENSE CODE (20303)	DETAILED DESCRIPTION OF THE EXPENDITURE	BENEFICIARY 1. Own HH's house 2. House of another HH	ESTIMATED AMOUNT PAID ON AVERAGE PER MONTH/YEAR NZD	LOCATION OF PROVIDER 1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	NOTE ID
20351	20352	20353	20354	20355	20356	20399
1. List here all the monthly expenses from the list in S2.3.1						
01	11	electric power meter	1	\$ 60.00	1	
02	22	petrol for generator	1	\$ 20.00	1	
03	31	gas for cooking stove	1	\$ 30.00	1	
04	51	Land line phone bill	1	\$ 40.00	1	
05	51	Land line phone bill of parents (other hh)	2	\$ 30.00	1	1
06				\$.00		
1. List here all the annual expenses from the list in S2.3.1						
16	52	Land line connection fees	1	\$ 100.00	1	
17				\$.00		
				TOTAL AMOUNT	\$ 280.00	
NOTES						
1	They pay for the land line phone of the parents who live in another household					

All expenditure identified in section S2.3.1 are specified in the section S2.3.2

4.5 Land and home

This section is divided in 2 sub section:

S2.4.1: Land and home details

S2.4.2: Land and home expenditure

4.5.1 Land and home details

The first Section 2.4.1 is designed to identify the type of expenditure incurred by the household during the past 12 months regarding the payment of land lease, the construction of a new house, the renovation or extension of the house or the basic routine maintenance of the house.

The house can belong to the household (main house, secondary house, or house rented out) or the household might pay land lease, construction, extension or routine maintenance for another household.

20402: During the last 12 months did you pay for? (Answer required / blank not allowed): expenditure can be made for the benefit of this household or another household, related to the following list of options:

1. Yes
2. No

20403: Expense code referring to 20404 (description)

101 – land lease

Payment for the lease of land (not including house rent as paid earlier).

201 – Surveying, architectural or drafting fees

This refers to any fees associated with surveying, architectural or drafting fees. Example of such is blueprint cost.

202 – Building permits, registration fees

This refers to any fees associated with surveying, architectural or drafting fees. Example of such is blueprint cost.

203 – General contractors, helpers, labourers

This refers to any fees associated with hiring of contractors, helpers and labourers.

204 – Material (concrete, blocks, lumber, steel, doors, cabinets, paint)

This refers to costs of building materials. It is common that this may be the main expense for the construction of a new house.

205 – Transportation of materials

This refers to any costs associated with transferring of materials. Examples: payment to quarry company for delivery of gravel; shipping to Tokelau.

206 – Other expenditures not mentioned above

Any expenditure not mentioned above is noted here.

If a household member has incurred any of these expenses for their own dwelling or the dwelling of another household in the last 12 months then record it here.

311 to 372 - Expenditure related to the maintenance of the house

Plumbing, roofing, carpentry, electrical, painting, pest and insect control and enclosure.

Each category is divided into 2 main types of expenditure:

- The purchase of goods (materials) related to the maintenance work mentioned
- The payment of contractors (services) who undertook the maintenance work mentioned

These categories are self-explanatory. There may be cases where a household may pay a contractor a lump sum to do a major job which may combine several of the categories listed. For such cases, the category contributing the most expense should be considered the most appropriate answer.

If a household member has paid for these services for any dwelling in the last 12 months then record it here.

411 to 422 - Expenditure related to the purchase / repair of tools

This last section covers spending on tools or equipment purchase for house and land maintenance services paid for by a household member. The 4 categories are:

411 – Large tools: motorized

Examples are listed, such as lawn mower, weed eater, chain saw, and other similar items

412 – Large tools: non-motorized

Examples are listed, such as wheel barrow, lawn roller, pick axe, and other similar items

421 – Small hand tools: motorized

Examples are listed, such as electric saw, drill, sander, and other similar items

422 – Small hand tools: non-motorized

Examples are listed, such as hammer, screwdriver, machete, and other similar items

20405 – Purchase / Paid for

Tick “X” if one of the household member purchased one of the expenditures listed (expense code 101 to 422):

- For the benefit of the household (the main house, secondary house or rented out house)
- For the benefit of another household (the house of another household)

20406 – Repair

Tick “X” if a household member incurred costs for the repair of large or small tools. Note that this is not an option for expenditure codes 101 to 372.

4.5.2 Land and home expenditure (S2.4.2)

S2.4.1 and S2.4.2 are closely related as each item (expense code) paid by the household (Column 20402 = 1) has to be specified in S2.4.2.

Key rule

Each answer ‘1’ in section S2.4.1 in question 20402 is related to at least one row in the section 2.4.2.

The same answer ‘1’ in S2.4.1 can lead to multiple expenditure identified in S2.4.2 (I pay maintenance work for my parents’ house, or for my secondary house)

20452 - Expense code

This is the code which should be entered for the “expense code” in the expenditure part for each section. It refers to column 20403 from S2.4.1. The possible codes are detailed below:

- 101. Refers to land lease
- 201. Refers to surveying, drafting fees
- 202. Refers to building permits
- 203. Refers to general contractors
- ...
- 422. Refers to Non-motorized tools

Codes 103, 214, 380 are not possible for example.

20453 - Detailed description

The expense code discussed above will give some indication as to what the expenditure was for, but we are often after more detailed information for each expense. For that reason a question providing a more detailed description for each expense is sought. Some examples may be as follows:

Example 4-7: Detailed expense description

Expense code	Detailed description
311	New toilet seat
311	New toilet bowl
311	Small plumbing materials
312	Plumber

20454 – Expense type

The expense type is related to column 20405 & 20406:

- If column 20405 is ticked, the expected code in column 20455 is 1 (purchase)
- If column 20406 is ticked, the expected code in column 20455 is 2 (repair)

20455 - Beneficiary

All the expenditure listed in this section could be paid for the benefit of another household. This might represent a support to family or friend, providing them with a financial support.

Example:

- I pay the renovation of relative's roof
- I bought some materials to extend the house of another household

Each payment made for the benefit of another household has to be specified as well in this section, and the beneficiary has to be properly reported:

- o Beneficiary 1 = this household
- o Beneficiary 2 = another household

All expenditure made for the benefit of another household are no longer expenditure for financial support (gift) and are not treated as final consumption expenditure (but transfer to support another household).

20456 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. The amount paid should be entered separately for each different expenditure item identified in the previous question.

Situations may arise where the household has more than one expense for the same expense code during the recall period. If this situation arises then every effort should be made to record each expenditure separately for this household. For example, if different plumbing materials were undertaken by the household, several lines in section S2.4.2 could have the same expense code.

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the "total amount" box. In other word, the total box should never be left blank.

The "total amount" box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the Pacific that purchases are made on credit, and the payments made at a later date. For these situations, it doesn't matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20456 - Location of provider

Location of provider refers to the physical location of the vendor from which the goods/service was obtained. This information is important to enable Balance of Payment analysis of the survey data. The three options for location of provider are:

1. Within Tokelau – Goods/service providers that are located in Tokelau;
2. Samoa – Goods/service providers that are located in Samoa; and
3. Outside Tokelau/Samoa – goods services providers that are located overseas or on the internet.

Example of section S2.4:

In this example, the household pays a land lease (\$1000 per year) and did some renovation in the bathroom. They bought in Samoa some materials, and they paid the plumber to do it.

S2.4.1 LAND AND HOME DETAILS

Line no.	Did you pay? 1. Yes 2. No	Expense code	Expenditure description	Expenditure type (tick if applicable)		NOTE ID
				Purchase	Repair	
20401	20402	20403	20404	20405	20406	20449

1 - Payment for land

01	1	101	Land lease	<input type="checkbox"/>	n/a	<input type="checkbox"/>
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2 - Expenditure related to construction of a new house, an extension or major modification

02	2	201	Surveying, architectural or drafting fees	<input type="checkbox"/>	n/a	<input type="checkbox"/>
03	2	202	Building permits, registrations fees	<input type="checkbox"/>	n/a	<input type="checkbox"/>
04	2	203	General contractors, helpers, labourers	<input type="checkbox"/>	n/a	<input type="checkbox"/>
05	2	204	Materials (concrete, blocks, lumber, steel, doors, cabinets, paint)	<input type="checkbox"/>	n/a	<input type="checkbox"/>
06	2	205	Transportation of materials	<input type="checkbox"/>	n/a	<input type="checkbox"/>
07	2	206	Other expenditure not mentioned above	<input type="checkbox"/>	n/a	<input type="checkbox"/>

3 - Expenditure related to the maintenance of a house or land

1 - Plumbing (materials and service)

08	1	311	Pipes, faucets, sinks, fittings, toilets, etc.	<input checked="" type="checkbox"/>	n/a	<input type="checkbox"/>
09	1	312	Services (contractor, plumber, helper)	<input checked="" type="checkbox"/>	n/a	<input type="checkbox"/>

S2.4.2 LAND AND HOME EXPENDITURE

Line no.	EXPENSE CODE (20404)	DETAILED DESCRIPTION OF THE EXPENDITURE	EXPENSE TYPE	BENEFICIARY	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	LOCATION OF PROVIDER	NOTE ID
			1. Purchase 2. Repair	1. Own HHs house 2. House of another HH	NZD	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	
20451	20452	30453	20454	20455	20456	20457	20499
01	311	Pipes	1	1	\$ 000,150.00	2	<input type="checkbox"/>
02	311	sink	1	1	\$ 000,350.00	2	<input type="checkbox"/>
03	311	bolt and nut	1	1	\$ 000,50.00	2	<input type="checkbox"/>
04	312	plumber	1	1	\$ 000,200.00	1	<input type="checkbox"/>
05	111	Land lease	1	1	\$ 001,000.00	1	<input type="checkbox"/>
20					\$ 000,000.00		
TOTAL AMOUNT					\$ 001,750.00		

Do not forget to
sum up all the
amounts

4.6 Household assets

This section is divided in 2 sub section:

S2.5.1: Household asset details

S2.5.2: Household assets expenditure

4.6.1 Household assets details (S2.5.1)

The first Section 2.5.1 is designed to identify:

- The asset the household members have or access (in working order)
- The expenditure on assets they made during the past 12 months

20502: Do you own? (Answer required / blank not allowed):

This question refers to the list of 41 items, interviewers have to go through all this list and ask if

1. Yes
2. No

⇒ This household has the asset in working order (asset out of order does not mean they own)

Notes:

- If the household rents a furnished house and does not own the furniture, but access them, in this case the answer is 1. YES
- If the household borrows the furniture or appliances to another household the answer is 2.NO

For every item listed, the household must report if they own that item in working order. Therefore, a “1” or “2” must be recorded for every item in question 20502. Even if the household did not purchase one of these items in the last 12 months, they will still possess many of the items listed, and as such should record an answer of “1” for question 20502. Remember, only tick the boxes for questions 20506 – 20507 if those expenditures occurred in the last 12 months.

20503: In the last 12 months did you buy? (Answer required / blank not allowed):

This question has to be asked for all the list of items. Expenditure can be made for the benefit of this household or another household

1. Yes
2. No

Any expenditure identified as 1.YES in 20503 has to be ticked in 20506/20507.

20504 – Expense code referring to 20505 (description)

The list is divided into 5 sub-groups of items:

Furniture (indoor, outdoor, even materials bought to build furniture):

Covers any piece of household furniture, whether it is for inside or outside, as well as major floor coverings such as carpet, mats and rugs. Purchase of materials for making of own furniture covered here as well.

Household textile: curtains, blankets, pillow, table cover, sheet...

Covers all materials which household members may have purchased for the bedroom, window coverings and bathroom (e.g. towels)

Major appliances: kitchen appliances, and generator, solar panel and water tank, air conditioner

This is the largest group and covers water tanks, septic tanks and cesspit. All other major electrical appliances for either the kitchen or laundry are also included. Other major appliances in this group include air conditioners, generators and solar units. The last category on the list for this section relates to smaller electrical appliances such as sewing machine, toasters, iron, fan, etc. Make sure this list is read out to prompt the respondent to remember these smaller purchases.

Recreational equipment: audio and video, optic and outdoor entertainments

This section covers all major recreational appliances a household may have had expenditure for. Televisions, sound machines, significant game consoles, photographic equipment, and sports equipment should all be covered here.

Computer: all computer and peripheral

Any items pertaining to a computer should be included in this section. This will cover the purchase of a laptop or PC, any software equipment to upgrade a computer and external hard-drives (including flash drives)

20506 Purchases / 20507 Repairs

Each expenditure identified in 20503 has to be specified as a purchase or a maintenance.

4.6.2 Household asset expenditure (S2.5.2)

S2.5.1 and S2.5.2 are closely related as each item (expense code) paid by the household (Column 20503 = 1) has to be specified in:

- Column 20506/20507 (“X”)
- S2.5.2.

Key rule

Each answer ‘1’ in section S2.5.1 in question 20503 is related to at least one row in the section 2.5.2

The same answer ‘1’ in S2.5.1 can lead to multiple expenditure specified in S2.5.2 (The household bought 2 fridges)

20552 - Expense code

This is the code which should be entered for the “expense code” in the expenditure part for each section. It refers to column 20504 from S2.5.1. The possible codes are the following:

- 101. Refers to bed mattress...
- 102. Refers to sofa, lounge, ...
- 103. Refers to tables
- 104. Floor lamps
- ...
- 505. Refers to other computer equipment

Codes 110, 214, 380 are not possible for example.

20553 - Detailed description

The expense code discussed above will give some indication as to what the expenditure was for, but we are often after more detailed information for each expense. For that reason a question providing a more detailed description of each expenditure is sought. Some examples may be as follows:

Example 4-7: Detailed expense description

Expense code	Detailed description
102	Couch
106	Outdoor plastic table
315	Food processor
402	GPS system

20554 – Expense type

The expense type is related to column 20506 & 20507:

- If column 20506 is ticked, the expected code in column 20554 is 1 (purchase)
- If column 20507 is ticked, the expected code in column 20554 is 2 (repair)

20555 - Beneficiary

All the expenditure listed in this section could be paid for the benefit of another household. This might represent a support to family or friend, providing them with a financial support.

Example:

- I buy a fridge for my mother's house
- I paid the maintenance for the washing machine of my relatives

Each payment made for the benefit of another household has to be specified as well in this section, and the beneficiary has to be properly reported:

- o Beneficiary 1 = this household
- o Beneficiary 2 = another household

20556 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. The amount paid should be entered separately for each different expenditure item identified in the previous question.

Situations may arise where the household has more than one expense for the same expense code during the recall period. If this situation arises then every effort should be made to record each expenditure separately for this household

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the "total amount" box. The total box should never be left blank.

The "total amount" box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the Pacific that purchases are made on credit, and the payments made at a later date. For these situations, it doesn't matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20557 - Location of provider

Location of provider refers to the physical location of the vendor from whom the goods/service was obtained. This information is important to enable Balance of Payment analysis of the survey data. The three options for location of provider are:

1. Within Tokelau – Goods/service providers that are located in Tokelau;
2. Samoa – Goods/service providers located in Samoa; and
3. Outside Tokelau/Samoa – goods services providers located in NZ or on internet.

Example of section S2.5:

In this example, the household bought a shelf (\$300) and 2 mats (one for themselves, and one for another household).

S2.5.1: HOUSEHOLD GOODS AND ASSETS DETAILS

Line no.	Do you own?	In the last 12 months, did you spend on?	Expense code	Items description	Expenditure type (tick if applicable)		NOTE ID
	1. Yes	2. No			Purchase	Repair	
20501	20502	20503	20504	20505	20506	20507	20549
1 - Purchases related to furniture, furnishings and floor coverings							
01	1	2	101	Beds, mattresses, bedroom sets (headboards, frames, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
02	1	2	102	Sofas, lounge chairs, couches, sofa sets, etc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
03	1	2	103	Tables (dining, coffee, desks, etc) or table sets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
04	1	2	104	Floor lamps, fittings, hanging lights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
05	1	1	105	Other significant indoor furniture (book shelves, stands)	X	<input type="radio"/>	<input type="radio"/>
06	2	2	106	Outdoor furniture, deck furniture, folding chairs / tables, etc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
07	1	1	107	Carpets, rugs, mats and local mats	X	<input type="radio"/>	<input type="radio"/>
08	2	2	108	Other furniture, furnishings and floor coverings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
09	n/a	2	109	Timber or other materials to make furniture	<input type="radio"/>	n/a	<input type="radio"/>

S2.5.2: HOUSEHOLD GOODS AND ASSETS EXPENDITURE

Line no.	EXPENSE CODE (20504)	DETAILED DESCRIPTION OF THE EXPENDITURE	EXPENSE TYPE	BENEFICIARY	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	LOCATION OF PROVIDER	NOTE ID
	101 to 500		1. Purchase 2. Repair	1. Own HHs house 2. House of another HH	NZD	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	
20551	20552	20553	20554	20555	20556	20557	20599
01	105	Shelve	1	1	\$ 300.00	1	<input type="radio"/>
02	107	Mat	1	1	\$ 100.00	1	<input type="radio"/>
03	107	Mat	1	2	\$ 100.00	1	<input type="radio"/>
04			<input type="radio"/>	<input type="radio"/>	\$, .00	<input type="radio"/>	<input type="radio"/>
20			<input type="radio"/>	<input type="radio"/>	\$, .00	<input type="radio"/>	<input type="radio"/>
TOTAL AMOUNT \$					500.00		

Do not forget to sum up all the amounts

4.7 Vehicles

This section is divided in 2 sub section:

S2.6.1: Vehicle details

S2.6.2: Vehicle expenditure

4.7.1 Vehicle details (S2.6.1)

The first section (2.6.1) is designed to identify:

- The vehicles that household members own (in working order); and
- The expenditure on vehicle they made during the past 12 months.

20602: *How many vehicles do you own?* (Answer required / blank not allowed):

This question refers to the list of 11 items, interviewers have to go through all this list and ask if

1. Yes

2. No

⇒ This household owns the vehicle in working order (asset out of order does not mean they own).

Notes:

- If the household rents the vehicle, the answer is 1. YES.
- If the household borrows the vehicle from another household the answer is 2. NO.

20603: *In the last 12 months did you buy/pay for?* (Answer required / blank not allowed):

This question has to be asked for all the list of items. Expenditure can be made for the benefit of this household or another household.

1. Yes

2. No

Any expenditure identified as 1.YES in 20503 has to be ticked in 20606/20607.

20604 – Expense code referring to 20605 (description)

The list is divided into 5 sub-groups of items:

- Vehicle: boat, cars, bicycle, motor bike, scooter... (12 MONTHS)
- Accessories for vehicle (12 MONTHS)
- Maintenance and spare parts (12 MONTHS)
- Registration and other fees related to vehicles (12 MONTHS)
- Fuel according to the purpose: an estimate of the breakdown of the fuel expenditure according to the purpose especially for boats (1 MONTH)

20606 Purchase / 20607 Repair

Each expense identified in 20603 has to be specified as a purchase or maintenance.

4.7.2 Vehicle expenditure (S2.6.2)

S2.6.1 and S2.6.2 are closely related as each item (expense code) paid by the household (Column 20603 = 1) has to be specified in:

- Column 20606/20607 (“X”); and
- S2.6.2.

Key rule

Each answer ‘1’ in section S2.6.1 in question 20603 is related to at least one row in the section 2.6.2

The same answer ‘1’ in S2.6.1 can lead to multiple expenditure specified in S2.6.2 (The household bought 2 cars)

20652 - Expense code

This is the code which should be entered for the “expense code” in the expenditure part for each section. It refers to column 20604 from S2.6.1. The possible codes are the following:

- 101. Refers to car...
- 102. Refers to pick up ...
- 103. Refers to truck, bus
- ...
- 505. Refers to fuel for motorized tools

Codes 111, 214, 380 are not possible for example.

20653 - Detailed description

The expense code discussed above will give some indication as to what the expenditure was for, but we are often after more detailed information for each expense. For that reason a question providing a more detailed description for each expenditure is sought. Some examples may be as follows:

Example: Detailed expense description

Expense code	Detailed description
104	Scooter
110	Vaa’a canoe
302	Change the clutch plate of the Toyota
303	New tire for the Nissan

20654 – Expense type

The expense type is related to column 20606 & 20607:

- If column 20606 is ticked, the expected code in column 20654 might be: 1, 2 or 3; but
- If column 20607 is ticked, the expected code in column 20654 is 2 (repair).

20655 - Beneficiary

All the expenditure listed in this section could be paid for the benefit of another household. This might represent a support to family or friend, providing them with a financial support.

Each payment made for the benefit of another household has to be specified as well in this section, and the beneficiary has to be properly reported:

- o Beneficiary 1 = this household
- o Beneficiary 2 = another household

20656 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. The amount paid should be entered separately for each different expenditure item identified in the previous question.

Situations may arise where the household has more than one expense for the same expense code during the recall period. If this situation arises then every effort should be made to record each expenditure separately for this household

Only fuel expenditure are collected over a 1 month period and listed in S2.6.2 in lines 13 to 20 at the bottom of the table.

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the “total amount” box. The total box should never be left blank.

The “total amount” box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the Pacific that purchases are made on credit, and the payments made at a later date. For these situations, it doesn’t matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20657 - Location of provider

Location of provider refers to the physical location of the vendor from whom the goods/service was obtained. This information is important to enable Balance of Payment analysis of the survey data. The three options for location of provider are:

1. Within Tokelau – Goods/service providers that are located in Tokelau;
2. Samoa – Goods/service providers located in Samoa; and
3. Outside Tokelau/Samoa – goods services providers located elsewhere or on internet.

Example of section S2.6:

In this example the household bought a new boat with motor, a new outboard motor, some spare parts for boat, they paid the boat registration fees (for the new boat) and they spent on fuel (fishing and recreation).

S2.6.1 VEHICLE AND ACCESSORIES DETAILS

Line no.	How many do you own?	In the last 12 months, did you pay?		Expense code	Expenditure description	Expenditure type (tick if applicable)		NOTE ID
		1. Yes	2. No			Purchase	Repair	
20601	20602	20603	20604	20605	20606	20607	20649	
12 months recall								
1 - Vehicles (cars, trucks, motorcycles, bicycles, and boats) owned								
07	1	1	107	Boat with outboard motor attached	X	n/a		
08	0	2	108	Canoe with outboard motor attached		n/a		
2 - Vehicle accessories owned								
11	1	1	201	Outboard motor	X	n/a		
12	X	2	202	Trailer		n/a		
13	X	2	203	Other accessories (car stereo, tow bar, winch, etc.)		n/a		
3 - Vehicle maintenance, parts, and repair								
14	X	2	301	Service (oil change, tune up, brakes, etc.) (including parts)	n/a			
15	X	2	302	Repair (body work, flat tyre, overhaul, etc.) (including parts)	n/a			
16	X	1	303	Parts only (tyre, spark plugs, brake pads, etc.)	X	n/a		
17	X	2	304	Other vehicle maintenance/improvements	n/a			
4 - Registration fees, licenses, towing services, and other related expenses								
18	X	1	401	Registration or inspection fees	X	n/a		
19	X	0	402	Driver's license fees		n/a		
20	X	2	403	Other vehicle expenses (eg, towing)		n/a		
1 month recall								
5 - Fuel, motor oils, or other lubricants								
21	X	2	501	Fuel for road vehicles (car, motorcycle, etc.)		n/a		
22	X	1	502	Fuel for boat - fishing purposes	X	n/a		
23	X	2	503	Fuel for boat - other business purposes (transport, tourism...)		n/a		
24	X	1	504	Fuel for boat - recreation (family trips...)	X	n/a		

S2.6.2 VEHICLES AND ACCESSORIES EXPENDITURE

Line no.	EXPENSE CODE (20604)	DETAILED DESCRIPTION OF THE EXPENDITURE	EXPENSE TYPE	BENEFICIARY	TOTAL AMOUNT PAID	LOCATION OF PROVIDER	NOTE ID
20651	20652	30653		20654	20655	20656	20699
1. List here all the annual expenses from the list in S2.6.1							
01	107	new boat + engine	1	1	\$10,000.00	3	
02	201	outboard motor	1	1	\$3,000.00	2	
03	303	hydrolic cable	1	1	\$1,100.00	2	
04	303	propeler	1	1	\$2,200.00	2	
05	303	anchor	1	1	\$350.00	2	
06	401	new boat registration	3	1	\$1,100.00	1	
07					\$		
2. List here all the monthly expenses from the list in S2.6.1							
13	502	fuel for fishing	1	1	\$200.00	1	
14	504	fuel for boat recreation	1	1	\$100.00	1	
TOTAL AMOUNT					\$14,050.00		

4.8 International domestic travel

Each section is divided in 2 sub sections:

S2.7.1/S2.7.3: International/domestic travel details

S2.7.2/S2.7.4: International/domestic travel expenditure

4.8.1 International/domestic travel details (S2.7.1/S2.7.3)

The first sections 2.7.1/2.7.3. are designed to identify:

- The travels done by the household members during the past 12 months (international & domestic); and
- The expenditure made during each travel (international & domestic).

Only private travels have to be recorded in this section, travel for working, business reasons are not part of this questionnaire (conference, meeting...).

20700/2750: *In the last 12 months, did any member of this household pay for any private travel (excluding business) to international destinations such as Samoa, New Zealand, Australia, etc?/domestic travel within Tokelau.*

1. Yes
2. No

20701/20751 – Travel code

Each travel has to be specified and detailed on separate lines; maximum 5 travels (if more than 5 travels use a separate booklet Module 2).

20702/20752 – Final destination

There are 6 answer options provided for international travel and 3 answer options for domestic travel. Simply enter the code corresponding to the “final destination” given.

20703 – Main purpose of the trip

There are 5 answer options provided for the main purpose of the trip. The main purpose of the trip leads to different type of expenditure.

20704 to 20753 – Number of persons who travelled? Household members

Simply indicate the number of person who went on the trip who are member of the household.

20705 – 20754 – Number of persons who travelled? Non household members

Simply indicate the number of person who went on the trip who was not member of the household. For example, if a cousin from another household accompany the family on vacation and the family covered all (or part) of her expenses then the cousin is counted/recorded here.

20706– Airfares

This question is straight forward and simply asks if a household member paid for airfares associated with the private travel.

20707 - 20755 – Sea fares

This question is straight forward and simply asks if a household member paid for sea fares (boat or ship fares) associated with the private travel.

20708 - 20756 – Accommodation

Accommodation covers costs associated with hotels/motels, etc., while away on the private trip. If the [HM] stays with family or friends while overseas and thus incurs no accommodation costs, leave this as blank.

Make sure accommodation costs associated with any transits on the way to/from the final destination are also included in this section.

20709 – Restaurants

Restaurants covers all the costs related to meals (restaurant, take away...) while on private travel. All other expenses related to food are not included in this section.

20710 – Shopping

The shopping related to this section is related to any other items that cannot be recorded elsewhere: nappies for babies, personal items like perfume, make up, etc.

Key Rule

All expenditure related to shopping have to be recorded in their proper section:

1. Household goods/assets: Module 2, Section 2.4
2. Clothing: Module 3
3. Telephone/laptop: Module 3

20711 – Transport (taxi, car rental)

Taxi or car rental have to be specified and totaled in this section. Expenditure on train can be reported here as well.

20712 – Health care

If the main purpose of the travel is “health care”, column 20712 has to be ticked but:

Key rule

All health expenditure has to be specified in the health section in Module 3

4.8.2 International/domestic travel expenditure (S2.7.2/S2.7.4)

All expenditure identified in S2.7.1 and S2.7.3 have to be specified in S2.7.2 and S2.7.4 (except health).

Key rule

Expenditure on health has to be identified in S2.7.1 (20712 ticked) but specified in Module 3

20722 and 20772 – Travel code (1 to 5)

It represents the first link between the 2 sub sections. It refers to 20701, the same travel may have generated different expenditure.

20723 and 20753 – Expense code (1 to 7 for international and 1 to 3 for domestic)

This represents the second link between the 2 sections. It refers to codes 1 to 7 for international travel and 1 to 3 for domestic travel.

20724 – 20774 - Detailed description

The expense code discussed above will give some indication as to what the expenditure was for, but we are often after more detailed information for each expense. For that reason a question providing a more detailed description for each expenditure is sought. Some examples may be as follows:

Example: Detailed expense description

Expense code	Detailed description
1	Air fare to NZ
2	Sea fare to Samoa
3	Hotel in Auckland
5	Nappies

20725 and 20775 - Beneficiary

All the expenditure listed in this section could be paid for the benefit of another household. This might represent a support to family or friend, providing them with a financial support.

Each payment made for the benefit of another household has to be specified as well in this section, and the beneficiary has to be properly reported:

- Beneficiary 1 = this household
- Beneficiary 2 = another household

20726 and 20776 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. The amount paid should be entered separately for each different expenditure item identified in the previous question.

Situations may arise where the household has more than one expense for the same expense code during the recall period. If this situation arises then every effort should be made to record each expenditure separately for this household

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the “total amount” box. The total box should never be left blank.

The “total amount” box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the Pacific that purchases are made on credit, and the payments made at a later date. For these situations, it doesn't matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20727 and 20777 - Location of provider

Location of provider refers to the physical location of the vendor from whom the goods/service were obtained. This information is important to enable Balance of Payment analysis of the survey data. The three options for location of provider are:

1. Within Tokelau – Goods/service providers that are located in Tokelau;
2. Samoa – Goods/service providers that are located in Samoa; and
3. Outside Tokelau/Samoa – goods services providers that are located elsewhere or on internet.

Example S2.7: Private Travel

In this example members of the household traveled overseas twice in the past 12 months. The first trip was a vacation in Samoa (3 household members) and the second was to accompany a relative from another household traveling to New Zealand for medical referral.

During the Samoa trip expenses on sea fares and shopping have been identified. For the NZ trip only air fare, sea fares and accommodation have been incurred.

S2.7.1 PRIVATE TRAVEL DETAILS (INTERNATIONAL)

1. Yes ☒ Provide details below
2. No ☐ Go to S2.7.3

Reference period last 12 months

Travel code	Final destination code 1. Samoa 2. New Zealand 3. Tuvalu 4. Australia 5. Other Pacific Island Country 6. Other	Main purpose of the trip (shopping...) 1. Holidays 2. Family event 3. Health 4. Education 5. Other (note)	Number of persons who travelled?		Air fares	Sea fares	Accommodation	Restaurant	Shopping (nappies...)	Transport (car rental, taxi)	Health care (hospital, treatment, analysis...)	NOTE ID							
			Household members	Non-household members									Expense code						
													1	2	3	4	5	6	7
20701	20702	20703	20704	20705	20706	20707	20708	20709	20710	20711	20712	20749							
01	1	1	03	00		X			X										
02	2	3	01	01	X	X	X												

S2.7.2 PRIVATE TRAVEL EXPENDITURE (INTERNATIONAL)

Line no.	TRAVEL CODE/EXPENSE CODE		DETAILED DESCRIPTION OF THE EXPENDITURE	BENEFICIARY 1. This HHs 2. Another HH	TOTAL AMOUNT PAID NZD	LOCATION OF PROVIDER 1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	NOTE ID
	Travel code 1 to 5	Expense code 1 to 6					
1. List here all the annual expenses from the list in S2.6.1							
01	1	2	sea fare to Samoa	1	\$ 000,300.00	1	
02	1	5	nappies	1	\$ 000,200.00	2	
03	1	5	food	1	\$ 000,400.00	2	
04	2	1	sea fare to Samoa	1	\$ 000,200.00	1	
05	2	2	Air fare to NZ	1	\$ 001,000.00	2	
06	2	3	Accommodation + restaurants	1	\$ 002,000.00	3	
TOTAL AMOUNT					\$ 004,100.00		

4.9 Household services

This questionnaire is made of 1 section only that allows the identification and the specification of expenditure in the same time.

4.9.1 General purpose of question

This question aims to determine all expenditures a household member has had with respect to household services. The question has been divided in to three sections for ease of collection:

1. Services related to individual homes; and
2. Other service expenditure.

1) Service related to individual homes

While some of these expenditures may appear similar to category 1 (e.g., gardening service) the main difference here is if the dwelling is a separate dwelling (i.e., not a multi-occupied house) and they employ the services of a gardener themselves, then these expenses will be recorded under this category. The same applies for any other service a household member pays for which applies only to their household, covering:

- Gardening or landscaping/yard
- Housekeeping/maid
- Babysitting/child minding
- Elderly
- Other services (drivers, cooks, security, etc)

2) Other service expenditure

The last category for this question covers any other services a household member may pay for. Only 7 other categories are identified as being significant:

- Passport, travel visa, birth certificates
- Legal services
- Freight and shipping services within Tokelau
- Freight and shipping services to Samoa
- Credit card fees (annual and ATM fees)
- Western Union/Money Gram Fees
- Financial or Banking fees

For cases where the cost was incurred with 2 different providers, it is advised to use the location of provider with majority of the cost.

20802 – During the past 12 months did you pay?

Interviewer have to go through all the list of items mentioned in this section asking if ‘Yes’ or ‘No’ the household spent on during the past 12 months (for themselves or for another household).

All the expenditure identified (paid during the past 12 months) have to be specified in questions 20805 to 20807)

20803 – 20804 – Expense code and description of the item

The description is already pre completed.

20805 - Beneficiary

All the expenditure listed in this section could be paid for the benefit of another household. This might represent a support to family or friend, providing them with a financial support.

Each payment made for the benefit of another household has to be specified as well in this section, and the beneficiary has to be properly reported:

- Beneficiary 1 = this household
- Beneficiary 2 = another household

20806 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. For each item listed, the total amount refers to the total amount spent during the past 12 months on this item. If the expenditure on the same item occurs every month, the monthly amount will be multiplied by 12.

Situations may arise where the household has more than one expense for the same expense code during the recall period. If this situation arises then record all expenditure on the same line.

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the “total amount” box. The total box should never be left blank.

The “total amount” box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the Pacific that purchases are made on credit, and the payments made at a later date. For these situations, it doesn't matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20807 - Location of provider

Location of provider refers to the physical location of the vendor from which the goods/service was obtained. This information is important to enable Balance of Payment analysis of the survey data. The three options for location of provider are:

1. Within Tokelau – Goods/service providers that are located in Tokelau;
2. Samoa – Goods/service providers that are located in Samoa; and
3. Outside Tokelau/Samoa – goods services providers in other locations or on internet.

Example 4-16: Household Services expenditure

In this example, the following expenditures were covered by household members:

1. Cleaning lady, \$100 per month (\$1,200 annual) in Tokelau
2. Passport fees, \$200 spent in Samoa
3. The household sent 2 times cargo to Samoa, \$500 each
4. Every month the household sends money to family in Samoa, the financial office charges them \$20 each transfer (\$240 in total)

	IN THE LAST 12 MONTHS, DID YOU PAY?	EXPENSE CODE	EXPENDITURE DESCRIPTION	BENEFICIARY	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	LOCATION OF PROVIDER	NOTE
Line no.	1. Yes 2. No			1. This HH 2. Another HH	NZD	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	ID
20801	20802	20803	20804	20805	20806	20807	20899

1 - Services related to individual homes

01	2	101	Gardening or landscaping/yard services	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>
02	1	102	Housekeeping/Maid services	1	\$ 1,200.00	1	<input type="checkbox"/>
03	2	103	Babysitting or child-minding services	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>
04	2	104	Elderly care	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>
05	2	105	Other services (drivers, cooks, security, etc) (note)	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>

2 - Other services charged to members of this household

06	1	201	Passports, travel visa, birth certificates	1	\$, 200.00	2	<input type="checkbox"/>
07	2	202	Legal services	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>
08	2	203	Freight and shipping services in Tokelau	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>
09	1	204	Freight and shipping services to Samoa	2	\$ 1,000.00	1	<input type="checkbox"/>
10	2	205	Credit card fees (annual and ATM fees)	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>
11	1	206	International money transfer fees	2	\$, 250.00	1	<input type="checkbox"/>
12	2	207	Financial or banking fees (Western Union etc.)	<input type="checkbox"/>	\$, .00	<input type="checkbox"/>	<input type="checkbox"/>

TOTAL AMOUNT \$ 2,640.00

4.10 Cash contributions to special occasions

4.10.1 General purpose of question

This question aims to determine all expenditures a household member incurred with respect to cash contributions to special occasions.

Key rule

In this section only money transferred is recorded. All the gift/goods purchased for donation are not recorded here but in their proper section for the benefit of another household (example if the household bought clothes for a birthday gift)

Key rule

The money has to be transferred to another household; transfers to another household member is not recorded.

20902 In the past 12 months did you pay?

Interviewers have to go through all the list of contribution asking if ‘Yes’ or ‘No’ the household paid for one of them during the past 12 months.

There are 8 categories for this question which cover:

1) Cash contributions for birthdays

This covers the cost of donations a household member may make to a family outside their household when a member of that family has a birthday. We are only collecting financial contributions the household members made in the last 12 months.

2) Cash contributions for funerals/wedding

This covers the cost of donations a household member may make to a family outside their household for funeral. It includes donations for cost of materials, coffin, and tombstone. It also includes the cost of payments made to a priest or pastor for providing the funeral service as well. Once again, we are only collecting financial contributions the household members made in the last 12 months.

3) Cash contributions for fundraisers

This covers cash donations for all fundraising activities. It is common for families or communities to hold fundraising to assist a cause of defray expenses that are costly for them they handle alone, such as for medical referral, student travel, etc. The cash contributions made to such events is recorded here. We are only collecting financial contributions that household member made to the family in the last 12 months.

4) Cash contributions for graduations

This covers the cost of donations a household member may make to a family outside their household for graduation. Once again, we are only collecting financial contributions the household members made to these families in the last 12 months.

5) Cash contributions for housewarming

All housewarming cash contribution any household member made to another person outside of the household is recorded here. It is common for families to have housewarmings so keep an eye out for these kind of expense. Similar to the categories above, expenses in the last 12 months is what we seek.

6) Cash contributions for traditional functions

This category includes cash contribution any household member made to another person outside of the household for traditional events. There are traditional feasts held on a regular basis, cash donations made towards these events are to be recorded here. Similar to the categories above, expenses in the last 12 months is what we seek.

7) Cash contributions for special occasions

Cash contribution any household member made to another person outside of the household for special occasions is to be recorded here. Examples of such occasions include Christmas, Easter, family reunions, etc. Similar to the categories above, expenses in the last 12 months is what we seek.

8) Cash donations for other events

This last category covers any other donations household members may have made for ceremonies not listed above. These could include anniversaries, major farewell functions, etc.

20906 - Amount paid

Care must be taken when entering the amount paid in the expenditure part of these sections. For each item listed, the total amount refers to the total amount spent during the past 12 months on this item. If the expenditure on the same item occurs every month, the monthly amount will be multiplied by 12. Situations may arise where the household has more than one expense for the same expense code during the recall period. If this situation arises then record all expenditure on the same line.

Total amount

At the bottom of the table, a box requesting the total of those expenditures needs to be filled in. Interviewers and supervisors will be provided with calculators in order to undertake each calculation. If a situation arises where there were no expenditures for that section during the recall period, then simply write zeros in the “total amount” box. The total box should never be left blank.

The “total amount” box is a straight-forward summing of the values in the column, regardless of the reference period for the payment.

Also worth noting is that not all expenditure purchases will be paid for at the time the household receives the benefit of the purchase. It is common throughout the Pacific that purchases are made on credit, and the payments made at a later date. For these situations, it doesn't matter if the payment will be made at a later date, record the known (or estimated) amount at the time the goods/service was acquired by the household.

20907 - Location of recipient

Location of recipient refers to the physical location of the household who receive the money. This information is important to enable Balance of Payment analysis of the survey data. The four options for location of receiver are:

1. Tokelau
2. Samoa
3. New Zealand
4. Other

Example: Cash Contributions expenditure

In this example, the following expenditures were covered by household members:

1. The household paid \$500 for the coffin and grave stone for their relative who passed away 2 months ago (another household)

2. The household head provided a \$200 cash gift to their friends from the same neighborhood who were holding a birthday party
3. The household head paid \$500 as a cash gift for different traditional custom ceremonies

	IN THE LAST 12 MONTHS, DID YOU PAY?	EXPENSE CODE	EXPENDITURE DESCRIPTION	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	LOCATION OF RECIPIENT	NOTE
Line no.	1. Yes 2. No			NZD	1. Tokelau 2. Samoa 3. New Zealand 4. Other	ID
20901	20902	20903	20904	20906	20907	20999
01	1	101	Cash contributions for birthdays	\$ 200.00	1	
02	1	102	Cash contributions for funerals (fakalavelave), wedding	\$ 500.00	2	
03	2	103	Cash contributions for fundraisers (medical, student, sports travel, etc.)	\$.00		
04	2	104	Cash contributions for graduations	\$.00		
05	2	105	Cash contributions for housewarmings	\$.00		
06	1	201	Cash contributions for traditional functions	\$ 500.00	1	
07	2	202	Cash contributions for other special occasions (Christmas, Easter, etc.)	\$.00		
08	2	203	Cash contributions for other events not specified above	\$.00		
TOTAL AMOUNT				\$ 1,200.00		

4.11 Provisions of financial support

4.11.1 General purpose of question

This question aims to determine all expenditures a household member has had with respect to provisions of financial support. There are 6 categories for this question which cover:

1) Donations to another HH

Also known as “remittances”, the first category for this question covers donations to other households. The payments can cover financial transactions to other households based in Tokelau, as well as other households based overseas. A typical example of an expenditure here would be if the household had a family member living overseas and sent them regular money to help get by throughout the year, then record the total amount paid in the last 12 months sent to this individual.

2) Donations to church (weekly or regular payments)

This category covers expenses household members make to the church on a regular basis when they attend their weekly church service. If for example, a household member donates \$5 a week every week to a church collection on Sundays, then add the total amount for the year together and record that amount in this questions (in this case $\$5 \times 52 = \260).

3) Donations to church (irregular-large donations)

This category also covers contributions to the church, but on an irregular basis. For example, if the church is trying to raise money to make an extension to their chapel, and a household member makes a one-time

donation of \$300 to the project, it should be recorded here. All contributions from all household members throughout the last 12 months should be added together and recorded here.

4) Cash Donations to community groups, 5) Cash donations to school & 6) Other cash donations

Just for completeness the categories of “donations to community”, “donations to school”, and “donations to other” were created just in case a household member made a financial contribution to one of these entities. Make sure all donations from all household members over the last 12 months are included.

Example: Provisions of Financial Support expenditure

In this example, the following expenditures were covered by household members:

1. The household head made 4 quarterly payments of \$500 to a relative in Tokelau
2. The household head donates \$5 to the church every Sunday at the service
3. The household head donated \$300 to the school his son attends

Line No.	In the last 12 months, did you pay?	Expenditure code	Expenditure Description	Total amount paid in the last 12 months.	Location of recipient	obs
	1=Yes 2=No			USD	code 21008	
21001	21002	21003	21004	21005	21006	21009
01	<u> 1 </u>	01	Cash donations to another household	\$ <u> 2 </u> , <u> 0 </u> <u> 0 </u> <u> 0 </u> .00	<u> 1 </u>	<u> </u>
02	<u> 1 </u>	02	Cash donations to church (weekly or regular payments, including tithe)	\$ <u> </u> , <u> 2 </u> <u> 6 </u> <u> 0 </u> .00	<u> 1 </u>	<u> </u>
03	<u> 2 </u>	03	Cash donations to church (irregular large donations, including tithe)	\$ <u> </u> , <u> </u> <u> </u> <u> </u> .00	<u> </u>	<u> </u>
04	<u> 2 </u>	04	Cash donations to community groups, village sport events, etc.	\$ <u> </u> , <u> </u> <u> </u> <u> </u> .00	<u> </u>	<u> </u>
05	<u> 1 </u>	05	Cash donations to school for events, supplies, etc.	\$ <u> </u> , <u> 3 </u> <u> 0 </u> <u> 0 </u> .00	<u> 1 </u>	<u> </u>
06	<u> 2 </u>	06	Cash donations to other groups not specified above	\$ <u> </u> , <u> </u> <u> </u> <u> </u> .00	<u> </u>	<u> </u>

\$, 2 5 6 0 .00 ←Total Amount

4.12 Loans

4.12.1 General purpose of question

This question aims to determine all expenditures a household member has had with respect to loans. Only loans which have an interest for the lender, and which members made repayment on in the past 12 months are to be recorded here. So loans where only the amount borrowed is returned should not be included.

If the loan was recently acquired, and no repayment made as yet, then the loan shouldn't be recorded. Only loans which repayments are currently being made are to be recorded.

4.12.2 Specific questions asked

S21102 – Loan code

This question requests a code to describe the purpose for why the money was borrowed. Eight (8) codes are available for this question:

1. Purchase or improvement of a dwelling (house)
2. Automobile or motorcycle
3. Boat or personal watercraft
4. Major household appliances

5. Travel
6. Customary or special occasions
7. Cash advance
8. Other personal purpose

Enter the code most appropriate for the loan type in the box provided.

S21103 – Lender

This question asks for the type of lender providing the loan for each loan taken out. Seven (7) options are available for this question:

1. Bank
2. Credit union
3. Other loan agency
4. Business – Stores or shops that also lend money
5. Employer – If any household member receives loan from their employer it is included here
6. Private person – Lender is another person, friend, co-worker, etc.
7. Other (Note) – Any other sources not listed above are included here

S21104/S21105 – Loan start date: month/year

Simply write in the month and year loan payment began in the boxes provided, using the codes below the table.

S21106/S21107 – Loan duration: Number/Unit

Simply indicate the number of years or months the loan will be paid off in the boxes provide. The number is written in while for the year and month you need to use the codes below the table.

S21108 – Loan Type

This question records whether the loan was taken out by an individual (cat=1), or was a shared loan between 2 or more people. If the loan was shared, specify if it was with another member of the household (cat=2) or a member of another household (cat=3).

S21109 – Main [HM] paying off this loan

This question records who the main member of the household is, involved in paying off the loan.

S21110 – What is the total amount borrowed

The amount required is the total amount borrowed when the loan was taken out. Do not record what is still owed on the loan.

S21111 – What is the interest?

This question requests the interest rate of the loans household members are still paying in the last 12 months. This information is available from the lending party so should be easy to obtain.

S21112 – How much is the regular payment: Amount

This question requests the actual amount of each repayment for the loan. Usually when a loan is obtained the repayment amount is already determined by the lender (let's say \$132.41), however, the person taking out the loan may decide to pay more than what is required (let's say \$150), then it's the \$150 that should be recorded.

S21113 – How much is the regular payment: Period

This question requests the period the repayment covers. As the codes below the table indicates, simply write in the box:

- 1 – if repayment is made biweekly,
- 2 – if repayment is made monthly
- 3 – if repayment period is different that the two listed above (make note).

Example: Loans expenditures

In this example, the following loan repayments were made in the last 12 months:

- The householder pays \$141 biweekly on a \$5,000 loan he took out two years ago from the bank to purchase a car, the interest rate on the loan was 13.7%. The loan duration period initially given was 3 years.
- Householder pays \$150.76 biweekly on a \$35,000 loan from the Housing Authority to build a house. The interest rate was 12.0%. Period for repaying the total loan was 10 years

Line No.	Loan Code	Lender	Loan Start Date		Loan duration e.g., 5 years		Loan Type	Main [HM] paying off this loan
	code 21102	code 21103	month	year	Number	Unit	1. Individual loan <i>Shared loan with:</i> 2. Member of this HH 3. Member of another HH	
						code 21107		
21101	21102	21103	21104	21105	21106	21107	21108	21109
01	|_2_|	|_1_|	|_1_|_|_1_|	|_1_|_|_1_|	|_0_|_|_3_|	|_2_|	|_1_|	|_0_|_|_1_|
02	|_1_|	|_7_|	|_0_|_|_3_|	|_0_|_|_8_|	|_1_|_|_0_|	|_2_|	|_2_|	|_0_ _ _1_|
03	|_|	|_|	|_|_|	|_|_|	|_|_|	|_|	|_|	|_|_|

code 21102: Loan Code

1=Purchase or improvement of a dwelling
2=Automobile or motorcycle
3=Boat or personal watercraft
4=Major household appliances
5=Travel
6=Customary or special occasion
7=Cash advance
8=Other personal purpose

code 21103: Lender

1=Bank
2=Credit Union
3=Other Loan agency
4=Business
5=Employer
6=Private Person
7=Other (obs)

code 21107: Unit

1 = Month
2 = Year

Line No	What is the total amount borrow ed?	What is the interest rate?	How much is the regular payment?		obs
			E.g., \$45.00 - Monthly		
			Amount	Period	
	USD	code 21113			
21101	21110	21111	21112	21113	21119
01	\$|_|_|_|_5_|_|_0_|_|_0_|_|_0_|_|.00	|_1_|_|_|_3_|_|_|_7_|_|%	\$|_|_|_|_1_|_|_4_|_|_1_|_|.00	|_1_|	|_|
02	\$|_|_|_|_3_|_|_5_|_|_|_0_|_|_0_|_|_0_|_|.00	|_1_|_|_|_2_|_|_|_0_|_|%	\$|_|_|_|_1_|_|_5_|_|_1_|_|.00	|_1_|	|_|
03	\$|_|_|_|_|_|_|_|_|_|_|_|_|_|_|.00	|_|_|_|_|_|_|_|_|_|_|_|_|_|_|%	\$|_|_|_|_|_|_|_|_|_|_|_|_|_|_|.00	|_|	|_|

\$|_|_|_|_4_|_|_0_|_|_|_0_|_|_0_|_|_0_|_|.00

← TOTAL →

\$|_|_|_|_|_2_|_|_9_|_|_2_|_|.00

code 21113: Period

1=Bi-weekly 2=Monthly 3=Other (obs)

4.13 Household assets insurance and taxes

4.13.1 General purpose of section

The questions in this section aim to determine all expenditures a household has had with respect to household assets insurance and taxes.

The expense of the past 12 months is what we seek with all expenditure types listed in this section.

The questions are divided in to two sections which cover:

- 1) Insurance for household assets
- 2) Taxes/fines

4.13.2 Specific questions asked

1) Insurance for household assets

This section covers insurances on the house and other major assets. If people pay the expenditure types listed here on a fortnightly basis, simply multiply the amount by 26 to derive the annual amount, if this is the case.

101 – Home insurance

If any member of the household made any payment towards insuring their homes, this is where the expense is indicated.

102 – Vehicle insurance

If any member of the household made any payment towards insurance of a vehicle, this is where the expense is indicated.

103 – Boat insurance

If any member of the household made any payment towards insurance of a boat, this is where the expense is indicated.

104 – Other insurance

If any member of the household made any payment other insurance beside those listed above.

2) Taxes/fines

As the name suggests, this section covers taxes and fines.

201 – Road use tax

If any member of the household made any tax payment towards road use tax during the last 12 months it should be recorded here. This payment is made at the same time as vehicle registration payments are collected with the amount being determined by the weight of the vehicle.

202 – Fines for government violations

If any member of the household paid for any government fines, this is where the expense is indicated. Examples include traffic citations, etc.

203 – Tax on imported goods

If any member of the household made any additional payments for goods purchased overseas as a tax in the past 12 months, this is where the expense is indicated. An example of this is when a person traveled abroad and brought back goods from overseas - if the value of the good is above a certain amount the Customs Office would impose a tax on it.

204 – Other taxes

If any member of the household made any payment towards purchasing of house or land in the last 12 months, this is where the expense is indicated.

Example: Household Assets Insurance & Tax expenditure

In this example, the following expenditures were covered by household members in the last 12 months:

1. The household head made four \$50 payments towards his home insurance
2. Household member paid \$50 to Customs & Tax Office on an order of perfumes and clothing

Line no.	IN THE LAST 12 MONTHS, DID YOU PAY?	EXPENSE CODE	EXPENDITURE DESCRIPTION	BENEFICIARY	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	LOCATION OF PROVIDER	NOTE ID
	1. Yes 2. No			1. This HHs 2. Another HH	NZD	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	
21201	21202	21203	21204	21205	21206	21207	21299
1. Insurance for household assets							
01	1	101	Home insurance	1	\$, 2 0 0 .00	1	
02	2	102	Vehicle insurance		\$,00		
03	2	103	Boat insurance		\$,00		
04	2	104	Other insurance		\$,00		
2. Taxes/Fines							
05	2	201	Road use tax		\$,00		
06	2	202	Fines for government violations		\$,00		
07	1	203	Tax on imported goods	1	\$, 5 0 .00	1	
08	2	204	Other, not incl. GST or Income tax (note)		\$,00		
TOTAL AMOUNT					\$, 2 5 0 .00		

4.14 Personal insurance

4.14.1 General purpose of section

The questions in this section aim to determine all expenditures a household has had with respect to personal insurance in the past 12 months. The following answer options are provided:

1. Medical insurance (basic plan)
2. Medical insurance (supplemental plan)
3. Medical insurance (other)
4. Life insurance – This refers to all life insurance
5. Other insurance – Other personal insurance not mentioned above

Example: Personal Insurance expenditure

In this example, the following expenditures were covered by household members:

1. The household head pays a total of \$13.72 fortnightly for the National Health Insurance basic plan packages, one for his son and the other for his aunt in another household.
2. The householder's spouse pay a total of \$24.76 fortnightly for National Health Insurance supplemental plan packages, one for her and the other for her husband.

3. Another member of the household pays \$40 biweekly for an overseas insurance plan package, offered by the corporation he works, for himself and another person.

1. Yes <input type="checkbox"/> Provide details below 2. No <input type="checkbox"/> Go to S2.14								
	INSURANCE NUMBER	EXPENSE CODE	INSURANCE CODE	TOTAL AMOUNT PAID IN THE LAST 12 MONTHS	NUMBER OF BENEFICIARIES OF THIS INSURANCE		LOCATION OF INSURANCE PROVIDER	
Line no.	1. Yes 2. No		1. Medical insurance (basic) 2. Medical insurance (supplemental) 3. Medical insurance (other) 4. Life insurance 5. Other insurance	NZD	HH members (module 1)	Another HH	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	NOTE ID
21301	21302	21303	21304	21305	21306	21307	21308	21399
Personal Insurance								
01	Insurance 1	101	1	\$, 357 .00	1	1	1	<input type="checkbox"/>
02	Insurance 2	102	2	\$, 810 .00	1	1	1	<input type="checkbox"/>
03	Insurance 3	103	4	\$ 1,040 .00	2	<input type="checkbox"/>	2	<input type="checkbox"/>
04	Insurance 4	104	<input type="checkbox"/>	\$,00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
05	Insurance 5	201	<input type="checkbox"/>	\$,00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL AMOUNT				\$ 2,207 .00				

4.15 Electrical household goods' power consumption

4.15.1 General purpose of section

The questions in this section aim to determine all electric equipment (appliances, entertainment, computer, etc.) used by the household, their power source, and power consumption. This will give us a general idea of power consumption and how perhaps this may change over time due to greater efficiency of equipment, but also by differences and potential increase of appliances used.

4.13.2 Specific questions asked

1) Electric power source

The first two questions ask whether the household is on a public electricity grid and if so, whether a cash power box is installed (the amount paid is already addressed in Section S2.3.1).

The next 4 questions aim to determine if any other electric power sources are used by the household, the approximate age of the equipment in years, what their power rating (watts per hour) is, and how many hours a week the equipment is on. From this, we will calculate the total wattage combined for you.

2) Major household appliances

Please identify absence or presence of each item here. If present, please specify approximate age, the wattage as shown on the equipment label (e.g., 1,500 Watts) and an estimate of the number of hours per week used. We will calculate the total wattage combined for you. Please add/estimate the volume of fridge and freezer. **Most major appliances will have the required details on a label around or underneath the equipment.**

3) Minor household appliances

As for major household appliances. For the nos. 30-32, please count the number of all lights in use by the household, make a guess as to their age, average rating in Watts and average number of hours used.

We cannot expect to have precise values given, an approximation will do here, especially for the minor items. The total wattage will be calculated for you.

4) Recreational & entertainment electrical equipment

As for other appliances, above. Again, an approximation will do.

5) Computer equipment

As for other appliances, above. Again, an approximation will do.

The value in answering all these questions carefully is not only to get an idea of power use, but also how the use of equipment can change over time (between now and the next survey we may hold in 5 years' time).

Example: Electrical household goods' power consumption

1. Power source

Line no.	Expense code	Item description	Present? 1. Yes 2. No	Approx. age in years (of main item)	Individual average rating (wattage)	Average number of hours used per week	Total wattage combined (kWh)	NOTE ID
21401	21402	21403	21404	21405	21406	21407	21408	21299
1 - Electric power source								
01	101	On public utility grid?	1	n/a	n/a	n/a	n/a	
02	102	Cash power meters installed	2	n/a	n/a	n/a	n/a	
03	103	Private solar power unit	2					
04	104	Private generator	1	3	8000	14		
05	105	Shared generator	2					
06	106	Other power source: specify _____	2					
07	107	None	2	n/a	n/a	n/a	n/a	

2. Major household appliances

3 - Minor household appliances

21	301	Microwave oven	1	2	1500	1		
22	302	Toaster	1	5	1000	1		
23	303	Free-standing grill or griddle	2					
24	304	Electric frying pan	2					
25	305	Electric jug / kettle	1	4	2000	4		

3 - Minor household appliances (cont'd)

31	311	Ceiling / hanging lights (incandescent / fluorescent / LED): Number <u>8</u>	1	3	60	4		
32	312	Floor lamps (incandescent / fluorescent / LED): Number <u>3</u>	1	3	100	3		
33	313	Hair drier or straightener	2					
34	314	Electric hair clippers	1	2		1		
35	315	Electric fan	1	11	500	30		

PART 5: GENERAL GUIDELINES FOR COMPLETING MODULE 3

5.1 Introduction

Module 3 – Individual Expenditures - as its name suggests, will be focusing on collecting data on expenditure which are best collected at the individual level. The sections addressed in this module cover the following topics:

1. Education (S3.1) – description and expenditure
2. Health (S3.2) – description and expenditure
3. Clothing (S3.3) – description and expenditure
4. Communication (S3.4) – description and expenditure
5. Luxury items (S3.5) – description and expenditure
6. Alcohol and tobacco (S3.6) – description and expenditure

The approach for tackling the instructions to this module is divided into 6 sections:

- Section 5.1: The introduction, which you are reading now.
- Section 5.2: RECALL: “the flap”.
- Section 5.3: Standardized approach to completing each section in Module 3.
- Section 5.4: RECALL: “reference periods”.
- Section 5.5: Details on how to fill in sections that have difference reference periods (communication expenditure, luxury items expenditure and alcohol and tobacco expenditure).
- Section 5.6: Definitions and instructions to complete each of the 6 sections in Module 3.

For Module 3, the process and format for completing all sections is similar, with exception of some questions that have more than one reference period. Therefore, 5.3 below introduces how to complete one section in Module 3 and all other sections should be completed in the same manner. However, there is a requirement to provide definition and instruction on each section, so this is provided in 5.6 below.

Given that different reference periods are used in some sections of Module 3, we provide a recap on reference periods (5.4) and give an example on how to complete a section that has multiple reference periods.

5.2 RECALL: “the flap”

Recall in section 4.2 where we discussed “the flap”.

The flap is an extension of the cover page and it contains the most basic of information of all persons who currently reside in the household or are household members. There are 12 rows for recording household members (and if there are more than 12 members within the household, complete on a new Module 1).

Given that Module 3 (Individual Expenditure) is, in fact, related to individual expenditure, the same order of people listed on the Module 1 flap should correspond to the same persons listed on the Module 3 flap.

As such, the Module 3 flap should be exactly the same as the Module 1 flap – just copy the Module 1 flap.

Remember to complete all information, in exact form as the Module 1 flap, including:

1. Person name
2. Sex
3. Age in complete years

Using the “flap”

The purpose of the flap is to assist interviewers in identifying the correct household members when recording additional information collected in this module. Once the flap has been filled in, open the flap out so this information can be aligned with other pages in the module, thus ensuring the correct details are recorded for each individual.

5.3 Standardized approach to completing all sections in Module 3

All 6 sections in Module 3 follow the same format. They all use the flap to reference the household member for whom the expenditure was incurred for, they all describe the expenditure that was incurred on the left page and detail the expenditure (i.e., amount paid, etc) on the right page.

Below we describe how to complete the standardized structure in Module 3, including linking ‘the flap’ with the expenditure description and detail.

As with Module 1, the flap should be left open for completion of the entire module so that the expenditures detailed in each section will correspond with the household member listed in the flap.

ENSURE THAT THE ORDER OF HOUSEHOLD MEMBERS LISTED IN THE MODULE 3 FLAP IS THE SAME ORDER AS IN MODULE 1 AND THAT THE INDIVIDUAL EXPENDITURES EXACTLY CORRESPOND TO THE PERSON FOR WHOM THE EXPENDITURES WERE INCURRED FOR.

Across each of the 6 questions in Module 3, there are some commonalities, which are described below:

1. Each section in Module 3 asks an leading ‘yes or no’ question about whether that section’s type of expense is incurred.
 - a. If the answer to the leading question is ‘yes’, then the section should be completed in full, including the expenditure description and detail pages.
 - b. If the answer to the leading question is ‘no’ then the interviewer should confirm that this is correct and, if so, move onto the next section in the module.
2. Each section has one or more reference periods, for which the total relevant expenditure (description and detail) incurred over the reference period is required.
3. Expense description and detail are linked to the household member listed in ‘the flap’ via the household member number (“[HM]”). The household member number occurs on all three forms – the flap, the expense description and the expense detail form. In the expense detail form, the household member number is described as the ‘beneficiary’, which means that this person is the beneficiary of the expenditure (i.e., the education expenditure was spent for the benefit of the beneficiary, or the clothes were purchased for the beneficiary, etc).
4. Each expenditure description page lists the beneficiary, which, as per above, is the household member who was beneficiary of the expenditure. The beneficiary should be the person identified in the expenditure description page.
5. Every expenditure description page has an expense code that allows the description to be linked to the expenditure detail page. This is a crucial element in this module and it must be used correctly. The expense code corresponds to the category of expenditure that was incurred in each section (for example, in the clothing description, the categories include: (1) men’s and boys’ clothes, (2) women’s and girls’ clothes, (3) infant clothes, (4) clothing accessories, (5) other accessories, (6) clothing fabrics, (7) shoes and slippers). These codes need to be taken from the expenditure description and entered in the expenditure detail to save the interviewer the time of entering the expense description for every transaction.
6. The detailed description of the expenditure occurs on the expenditure detail section and should be sufficiently detailed to understand what the expense was. For health, there is no requirement to understand the ailment that was being treated.

7. Amount paid is recorded in every section's expenditure detail page. This should be the amount paid per transaction (if possible). For example, if girls clothes are identified as being purchased in the expenditure description section, it is possible that there were more than one transaction (i.e., if a dress and top are purchased). In this case, it is ideal that these two transactions are recorded separately on the expenditure detail page. Therefore, the expense would be identified with a single "X" on the expenditure description page, while there may be multiple transactions associated with this expenditure on the expenditure detail page. The total amount paid is the sum of amounts paid for each transaction, including transactions with a different reference period – just add up all the total amounts.
8. Each expenditure detail page has the location of provider. This was discussed above, but to recall it refers to the physical location of the vendor from which the goods/service was obtained. This information is important to facilitate balance of payment analysis with the survey data. The three options for location of provider are:
 - a. Within Tokelau – Goods/service providers that are located in Tokelau;
 - b. Samoa – Goods/service providers located in Samoa; and
 - c. Outside Tokelau/Samoa – goods services providers located in NZ, on the Internet, or other.
9. As with all other Modules, "Note ID" is also used in Module 3. Use the note ID throughout all Module's, including Module 3, as described earlier.

"THE FLAP"

HOUSEHOLD LISTING: ALL INDIVIDUALS

Copy the name, sex and age of all household member from Module 1 Flap
Row 80 represents persons who no longer live in the household (S1.6).
Row 90 represents persons in other households
Household (HH) Member (HM)

PERSON NAME (01 = Household Head)	SEX 1 = Male 2 = Female Write the appropriate code in the box	AGE IN COMPLETED YEARS Enter 000 for child under 1 year
10101	10102	10103
01	(a)	
02		
03		

EXPENDITURE DESCRIPTION

SECTION S3.3.1: CLOTHING DESCRIPTION

30300: In the last 3 months, did anyone from this household pay for any clothing apparel, shoes, accessories or materials indicated below, either for a person in this household or someone else in a different household? (Indicate beneficiary below)

1. Yes Indicate expenses below
2. No Go to S3.4.1

Don't forget expenses of persons listed in S1.6 (who left the household during the year)

Reference period last 3 months

Opening yes/no question

DURING THE LAST 3 MONTHS DID YOU SPEND ON (X IF YES)

Line no./ [HM]	Men's and boys' clothes Eg. shirts, T-shirts, shorts, pants, underwear (include school uniforms)	Women's and girls' clothes Eg. dresses, blouses, skirts, slacks, underwear (include school uniforms)	Infant clothes (*2 yrs old) Eg. dress, shirt (include disposable diapers)	Clothing accessories Eg. hat, cap, belt	Other accessories Eg. watch, jewelry, perfume	Clothing fabrics Eg. lace, material	Shoes & slippers Eg. shoes, sandals, boots	NOTE ID
Expense code	1	2	3	4	5	6	7	
30301	30302	30303	30304	30305	30306	30307	30308	30309
01	(a)							
02								
03								

Household member ([HM]) is linked from "the flap", to the "expenditure description" and to the "expenditure detail" (beneficiary number) as shown above

EXPENDITURE DETAIL

SECTION S3.3.2: CLOTHING EXPENDITURE

30380: For all expenditure identified in S3.3.1 please provide the expenditure details in the table below.

Reference period last 3 months

EXPENSE CODE	DETAILED DESCRIPTION OF THE EXPENSES	BENEFICIARY HM # 80 = last S1.6 90 = other HH	TOTAL AMOUNT PAID NZD	LOCATION OF PROVIDER	NOTE ID
1 to 7					
(b)	30353	30354	30355	30356	30358
01					
02					
03					
04					
05					
06					
07					
08					

Expense codes link between "expenditure description" and "expenditure detail"

The above figure demonstrates the linkages between 'the flap', the expenditure description and the expenditure detail that are common throughout all of Module 3. The flap is on the left, the expenditure description in the middle and the expenditure detail on the right.

Remember that 'the flap' should be completed at the beginning of Module 3. Note the leading 'yes/no' question at the beginning of the expenditure description (if 'no', continue to the next section and if 'yes' complete the section). Also note the reference periods, which change between each section within Module 3.

The linkages labelled '(a)' demonstrate how the household member occurs on and is linked between all three sheets – the flap, the expenditure description and the expenditure detail. Note that on the flap and the expenditure description that household member IDs are auto filled, however for the expenditure detail is needs to be filled to identify the household member for which the expenditure was incurred by (see example below).

In addition to the household member, note that the expenditure code also links between the description and detail (refer (b) above). If an expenditure is marked on the expenditure description (e.g., HM01, expenditure code 7 = shoes and slippers purchased for household member 1), then the expenditure code 07 should be entered on the expenditure detail with the additional description, HM#, amount and location of provider being filled. Using this, we can identify what the expenditure was, the amount and who it was for.

An example of a completed form is provided below.

HOUSEHOLD LISTING: ALL INDIVIDUALS

Copy the name, sex and age of all household member from Module 1 Flap
Row 50 represents persons who no longer live in the household (S1.5).
Row 90 represents persons in other households
Household (HM) Member (PM)

PM	PERSON NAME (01 = Household Head)	SEX 1 = Male 2 = Female Write the appropriate code in the box	AGE IN COMPLETED YEARS Over 100 for child under 1 year
10101	10102	10103	10104
01	First name Surname Bertrand	1	0 6 5
02	First name Surname Michael	1	0 4 5
03	First name Surname Pierre	1	0 1 0
04	First name Surname Jaap	1	0 0 8
	First name		

SECTION S3.1.1: EDUCATION DESCRIPTION

30100: 1. Did anyone in this household receive a grant/scholarship during the past 12 months?
2. Did anyone in this household pay for school related items/services for a household member or a member of another household?
(Tick the beneficiary)

1. Yes ☒ Provide details below
2. No ☐ Go to S3.2.1

Don't forget expenses of persons listed in S1.6 (who left the household during the year)

Reference period last 12 months

TICK "X" FOR THE BENEFICIARY OF SCHOLARSHIP/GRANT	TICK "X" FOR THE BENEFICIARY OF THE EXPENDITURE											NOTE ID
	Tuition/ Fees (application, exams, etc.)	Boarding	School uniform (not ages given to)	Text books, exercise books, stationery	Computer, if not listed elsewhere (communication, education, etc.)	Activity expenses	Other education expenditure (tuition, etc.)					
Expense code:	2	3	4	5	6	7	8	9	10	11		
30101												
30102												
30103												
30104												
30105												
30106												
30107												
30108												
30109												
30110												
30111												
30112												
30149												

SECTION S3.1.2: EDUCATION EXPENDITURE

30150: For all expenditure identified in S3.1.1 please provide the expense details in the table below

Reference period last 12 months

TRANSACTION CODE	DETAILED DESCRIPTION OF THE EXPENSES	BENEFICIARY HM # SD = list S1.6 90 = other HH	TOTAL AMOUNT PAID /RECEIVED NZD	LOCATION OF PROVIDER 1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	SCHOOL TYPE 1. Public school 2. Private school	NOTE ID
30151	30152	30153	30154	30155	30156	30157
30158	30159	30160	30161	30162	30163	30164

1. List here all the annual expenditure from the list in S3.1.1

01	0 3	School	0 3	\$ 15,000.00	3	2	
02	0 6	Boarding fees	0 3	\$ 10,000.00	3	2	
03	0 7	School sports uniform	0 3	\$ 1,100.00	3	2	
04	0 8	Maths text	0 3	\$ 550.00	3	2	
05	0 2	Secondary fees	0 4	\$ 1,500.00	1	1	
06	0 8	English text	0 4	\$ 75.00	1	1	
07	0 8	Science text	0 4	\$ 60.00	1	1	
08				\$.00			
09				\$.00			
10				\$.00			

TOTAL: \$26,785

The above is an example of the completed education section, which is the same structure as the other 5 sections in Module 3. The only exception to this is sections that have multiple reference periods, for which an example is provided below.

For the above, we see that the flap is completed with 4 household members ages 65, 45, 10 and 8 years. Given the age structure of the household, it is usual to expect the young household members to have educational expenses, however this is not to say that adults will never incur education expenses – this should be determined during the interview.

We have 4 household members and we see from the education description sheet (middle) that HMs 4 and 4 incurred educational expenses over the past 12-months.

For HM3 (Pierre), we see that he is a 10 year old male who was recipient of a scholarship/grant and incurred the following education expenses: secondary school; boarding; school uniform; and text books. These are identified on the expenditure description page. The details of these expenditure are provided on the expenditure detail page, where we see that the school fees (expenditure code 03 for HM 03) were \$15,000, boarding fees (expenditure code 06; HM 03) were \$10,000 and so on. The location of provider is outside Tokelau or Samoa and is a private school.

For HM4 (Jaap), we see that he is a 8 year old male who incurred the following education expenses: school fees and text books – these are identified on the education description page. The details of these expenses are provided on the right. We see that secondary fees (expense code 02; HM 04) were \$1,500 and text books (expense code 08; HM 04) were two transactions of \$75 and \$60. The location of provider is in Tokelau and a public school.

NOTE THAT WE CAN HAVE MORE THAN ONE TRANSACTION PER EXPENSE CODE (SEE ENGLISH AND SCIENCE TEXT BOOKS PURCHASED ABOVE). THESE SHOULD BE RECORDED AS SEPARATE TRANSACTIONS.

5.4 RECALL: reference periods

The reference period is the time that expenditures (in Module 3) need to be recalled and reported on. Depending on the information being sought, different reference periods are used throughout Module 3. For example, for education, the reference period is 12 months, while for clothing the reference period is 3 months.

There are however cases in Module 3 where 2 reference periods are required. For example, in communication, there is a reference period of 1-month and 12-months for different expenditure items. This is because items, such as pre-paid phone cards and internet used away from home are more easily remembered over a 1-month period as these purchases are more frequent, while items such as mobile phones, tablets and laptops are larger expenditure items that are purchased less frequently, so a 12-month recall period is more appropriate.

The recall periods adopted for each question are presented in the top right hand corner of the first page for that question. A colour scheme is adopted to differentiate each reference period, which can be seen below.

The last day of the reference period should correspond to the date of the interview, so if the interview took place on 11 May, 2015, then the reference periods for each of the 4 options is provided in the example below.

Identifier	Colour	Reference period	Example: Interview on 11 May 2015
Reference period last 12 months	Yellow	12 months	12 May 2014 to 11 May 2015
Reference period last 3 months	Green	3 months	12 February 2015 to 11 May 2015
Reference period: last month	Red	1 month	12 April 2015 to 11 May 2015
Reference period last 7 days	Blue	1 week	5 May 2015 to 11 May 2015

5.5 Completing sections with more than 1 reference period

As described above, in Module 3 there are three sections with more than 1 reference period, namely: communication expenditure, luxury items expenditure and alcohol and tobacco expenditure. These sections should be completed in the same manner as described above, with the only change being that the items with different reference periods should be reported separately on the expenditure detail form. This is to allow us to understand what multiplier we should use in data analysis to work out annual expenditure. If an item with a reference period of 1-year is recorded in the area with a reference period of 1-week, it will be multiplied by 52 to calculate annual amounts and will give wrong results.

NOTE: BE CAREFUL THAT YOU RECORD EXPENDITURE ITEMS UNDER THE CORRECT REFERENCE PERIODS.

An example of a section from Module 3 with difference reference periods is provided below.

SECTION S3.6.1: ALCOHOL & TOBACCO DESCRIPTION

3600: For each household member aged 10 and above, identify whether s/he:
 - consumed alcohol or cigarettes (and/or both) during the last 7 days (tick 30602 - 30605)
 - bought alcohol or tobacco during the past 7 days - (tick 30606 - 30611)
 - bought electronic cigarettes or recharge cartridges during the past 12 months - (tick 30612 - 30613)

Line no./ [HM]	DURING THE LAST 7 DAYS				DURING THE LAST 7 DAYS DID [HM] BUY ("X" IF YES)						DURING THE PAST 12 MONTH DID [HM] PAY		NOTE ID
	DID [HM]:			How many cigarettes did [HM] smoke?	ALCOHOL				TOBACCO		Elect. cigarette	Recharge cartridges	
	Drink alcohol?	Smoke elect. cigarette?	Smoke tobacco?		Beer	Wine	Spirits Whisky ...	Kalava	Cigarette stick or packet	Other tobacco			
Expense code	1=Yes 2=No				1	2	3	4	5	6	7	8	
30601	30602	30603	30604	30605	30606	30607	30608	30609	30610	30611	30612	30613	30614
01	1	1	2	0	X	X						X	
02	2	2	1	50					X				
03	2	2	2	0									
04													
05													

Note that HM 3 (Pierre) is included as he is 10 years old. Jaap is excluded as he is 8 years old.

Items with 7-day reference periods are reported in the 7-day expense detail (on the right)

SECTION S3.6.2: ALCOHOL & TOBACCO EXPENDITURE

30650: For all expenditure identified in S3.6.1 please provide the expense details in the table below.

EXPENSE CODE	DETAILED DESCRIPTION OF THE EXPENSES	BENEFICIARY	TOTAL AMOUNT PAID	LOCATION OF PROVIDER	NOTE ID
Line no.	1 to 7	HM # 80= list S1.5 90 = other HH	NZD	1. Tokelau 2. Samoa 3. Outside Tokelau or Samoa	
30651	30652	30653	30654	30655	30656
1. List here all the 7 days expenses from the list in S3.6.1					
01	01	24 beers - VB	01	\$ 60.00	1
02	02	2 bottles of wine - Tyrrells	01	\$ 40.00	1
03	05	1 pack of Pall Mall	02	\$ 6.00	1
04	05	1 pack of Pall Mall	02	\$ 6.00	1
05					
06					
07					
08					
09					
10					
11					
12					
Items with 12-month reference periods are reported in the 12-months expense detail (on the right)					
2. List here all the 12 months expenses from the list in S3.6.1					
13	08	2 cartridges	01	\$ 120.00	2
14					
15					

The above example shows that only Household Members 1 to 3 are included (i.e., excluding Jaap from the above example as he is 8 years old) in the alcohol and tobacco section as it asks for household members aged 10 or more. The pink box on the left and right represent expenditures with a reference period of 7-days, while the green box represents expenditure with a reference period of 12-months. Note that the expenditures with a 7-day reference period (pink box) are recorded on the top of the expenditure detail sheet, while the reference periods with a 12-month reference period (green box) are recorded as the bottom of the expenditure detail sheet.

ENSURE THAT THE EXPENDITURES ARE RECORDED IN THE CORRECT REFERENCE PERIOD AREAS IN THE EXPENDITURE DETAIL SECTION.

5.6 Definitions and instructions for completing each section in Module 3.

We have already discussed the following common definitions in module 3 above:

1. Leading yes/no question
2. Reference periods
3. The flap
4. The beneficiary
5. Expense codes
6. Detailed description of expenditure
7. Amount paid per transaction
8. Total amount paid
9. Location of provider
10. Note id

Given that these common definitions and structure for completing the sections in Module 3 have already been discussed above, this section will mainly focus on specific expenditure definitions for the 6 sections of Module 3.

5.6.1 Education definitions

- **Age:** All household members
- **Reference period:** 12 months
- **Scholarship / grant:** Identify if any household member has been the beneficiary of a scholarship/grant. If a scholarship/grant is provided, then the process is as follows:
 - In S3.1.1 put an “X” next to the corresponding HM(s) who benefits from the scholarship/grant;
 - In S3.1.2 enter the full amount paid (including what is paid for by the scholarship/grant) for all education expenditure (do not only write what the household pays, write the full expenditure including what is paid by the scholarship/grant provider, even if they pay directly to the educational institution); and
 - In S4.7(24) write the full amount received (income) for the scholarship/grant.
- **Tuition fees (pre/primary, secondary, university, other tertiary):** if any expense was incurred over the previous 12-months for attending an educational institution, place an “X” in the relevant cell that corresponds with the education level and household member.
- **Other expenses (boarding, school uniform, books, activity, other):** as above, if any expense was incurred over the previous 12-months for other educational expenses, place an “X” in the relevant cell that corresponds with the expenditure code.
- **Detailed description of the expenses:** provide a detailed description of the expense item(s).

REMEMBER:

1. Answer the initial yes/no question and seek confirmation when response is no
2. The household members listed in the flap should correspond with the beneficiary of education expenditure
3. Take the expense code from the expenditure description sheet and write it in the expenditure detail sheet
4. Write the corresponding beneficiary in the expense detail sheet for whom the expenditure is incurred for
5. You can have more than 1 expense item per expense code for each household member
6. Write the total amount paid per transaction
7. Sum all expense transactions to get the total amount
8. Write the location of provider and school type codes
9. Write notes when necessary, especially in the case that a grant/scholarship is provided

5.6.2 Health definitions

- **Age:** All household members
- **Reference period:** 12 months
- **Major expenses (in-patient, specialist services, other major charges):** if any major health expenses were incurred over the previous 12-months, place an “X” in the relevant cell that corresponds with the health expense and household member.
- **Other expenses (GP, traditional healer, dental, pre/ante natal, medications):** as above, if any other health related expenses were incurred over the previous 12-months, place an “X” in the relevant cell that corresponds with the expenditure code.
- **Detailed description of the expenses:** provide a detailed description of the expense item(s) and note that there is no need to make reference to the illness/ailment that was being treated.

REMEMBER:

1. Answer the initial yes/no question and seek confirmation when response is no
2. The household members listed in the flap should correspond with the beneficiary of health expenditure
3. Take the expense code from the expenditure description sheet and write it in the expenditure detail sheet
4. Write the corresponding beneficiary in the expense detail sheet for whom the expenditure is incurred for
5. You can have more than 1 expense item per expense code for each household member
6. Write the total amount paid per transaction
7. Sum all expense transactions to get the total amount
8. Write the location of provider code
9. When necessary, write notes

5.6.3 Clothing definitions

- **Age:** All household members
- **Reference period:** 3 months
- **Clothes (make, female, infant), accessories (clothing and other), fabrics, shoes and slipper expenses:** if any of these clothing and footwear expenses were incurred over the previous 3-months, place an “X” in the relevant cell that corresponds with the clothing and footwear expense and household member
- **Detailed description of the expenses:** provide a detailed description of the expense item(s)

REMEMBER:

1. Answer the initial yes/no question and seek confirmation when response is no
2. The household members listed in the flap should correspond with the beneficiary of clothing and footwear expenditure
3. Take the expense code from the expenditure description sheet and write it in the expenditure detail sheet
4. Write the corresponding beneficiary in the expense detail sheet for whom the expenditure is incurred for
5. You can have more than 1 expense item per expense code for each household member
6. Write the total amount paid per transaction
7. Sum all expense transactions to get the total amount
8. Write the location of provider code
9. When necessary, write notes

5.6.4 Communication definitions

- **Age:** All household members
- **Reference period:** 1 month and 12 months
- **1 month communication expenses (prepaid talk, top-up, data, contract, internet):** if any of these communication expenses were incurred over the past month, place an “X” in the relevant cell that corresponds with the communication expense and household member.

- **12 month communication expenses (mobile phone, smart phone, tablet, laptop, computer):** if any of these communication expenses were incurred over the previous 12-months, place an “X” in the relevant cell that corresponds with the expenditure code.

REMEMBER: IF COMPUTERS AND TABLETS ARE RECORDED IN MODULE 2 (S2.5.1), DO NOT RECORD THEN AGAIN IN MODULE 3

- **Detailed description of the expenses:** provide a detailed description of the expense item(s).

REMEMBER:

1. Answer the initial yes/no question and seek confirmation when response is no
2. The household members listed in the flap should correspond with the beneficiary of communication expenditure
3. **Record the transaction details in the appropriate reference period area**
4. Take the expense code from the expenditure description sheet and write it in the expenditure detail sheet
5. Write the corresponding beneficiary in the expense detail sheet for whom the expenditure is incurred for
6. You can have more than 1 expense item per expense code for each household member
7. Write the total amount paid per transaction
8. Sum all expense transactions to get the total amount
9. Write the location of provider code
10. When necessary, write notes

5.6.5 Luxury items definitions

- **Age:** All household members
- **Reference period:** 3 months and 12 months
- **3 month luxury items expenses (male and female haircuts):** if any of these luxury items expenses were incurred over the past 3-months, place an “X” in the relevant cell that corresponds with the expense and household member.
- **12 month luxury items expenses (tattoos, piercing, gym, lessons):** if any of these luxury items expenses were incurred over the previous 12-months, place an “X” in the relevant cell that corresponds with the expenditure code.
- **Detailed description of the expenses:** provide a detailed description of the expense item(s).

REMEMBER:

1. Answer the initial yes/no question and seek confirmation when response is no
2. The household members listed in the flap should correspond with the beneficiary of luxury expenditure
3. **Record the transaction details in the appropriate reference period area**
4. Take the expense code from the expenditure description sheet and write it in the expenditure detail sheet
5. Write the corresponding beneficiary in the expense detail sheet for whom the expenditure is incurred for
6. You can have more than 1 expense item per expense code for each household member
7. Write the total amount paid per transaction
8. Sum all expense transactions to get the total amount
9. Write the location of provider code
10. When necessary, write notes

5.6.6 Alcohol and tobacco definitions

- **Age:** Household members ages 10 years and over
- **Reference period:** 7 days and 12 months
- **7 day usage (alcohol, electric cigarettes, tobacco):** use the codes (1 = yes; 2 = no) to identify if any household members ages 10 or more have used alcohol, electric cigarettes or tobacco in the past 7 days and how many cigarettes were smoked (enter total number of sticks).

- **7 day expenditure (alcohol - beer, wine, spirits, kalave; tobacco – cigarette stick or packet, other tobacco):** if any of alcohol and tobacco expenses were incurred over the past 7-days, place an “X” in the relevant cell that corresponds with the expense and household member.
- **12 month expenses (electric cigarette and recharge cartridges):** if any of these expenses were incurred over the previous 12-months, place an “X” in the relevant cell that corresponds with the expenditure code.
- **Detailed description of the expenses:** provide a detailed description of the expense item(s).

REMEMBER:

1. Answer the initial yes/no question and seek confirmation when response is no
2. The household members listed in the flap should correspond with the beneficiary of alcohol and tobacco expenditure
3. **Record the transaction details in the appropriate reference period area**
4. Take the expense code from the expenditure description sheet and write it in the expenditure detail sheet
5. Write the corresponding beneficiary in the expense detail sheet for whom the expenditure is incurred for
6. You can have more than 1 expense item per expense code for each household member
7. Write the total amount paid per transaction
8. Sum all expense transactions to get the total amount
9. Write the location of provider code
10. When necessary, write notes

PART 6: SPECIFIC GUIDELINES FOR COMPLETING MODULE 4 - INCOME

6.1 Introduction

Module 4 – Income - collects all income sources for all individuals in the household over the past 12 months. As there are many ways in which household members can generate income, there are quite a few sections in this module. The income is collected at different levels throughout the module. In some cases income will be collected separately for each job, each business, or collected from the household as a whole, as is the case for subsistence type income activities.

The key sections covered in this module are as follows:

1. Wage and Salary Income
2. Income from non-subsistence business activities
3. Income from agricultural and forestry activities
4. Income from handicraft activities
5. Income from livestock and aquaculture activities
6. Income from fishing and hunting activities
7. Property & Transfer Income and Other Receipts
8. Remittances and other cash gifts

Each income topic above will form a separate section in this part of the manual.

While completing this manual, refer back to the answers household members have provided when filling in section 1.2 of Module 1. This question contains information about the activities all household members aged 15 and over have undertaken in the last week. If information is provided in section 1.2 of Module 1 about activities relating to wage and salary jobs, business activities or subsistence activities, then make sure the incomes are included in the appropriate sections of this module.

6.2 Wage and salary

The first section of the income module covers income collected over the last 12 months from wage and salary jobs undertaken by household members 15 years and over. These wage and salary jobs could be with the government working as a public servant, or for a private employer. As long as a wage or salary is being provided by the employer, the information should be listed in this question.

The information is collected in three sections:

1. S4.1.1: Collects separate information for each wage and salary job a household member aged 15 and over currently has in country (within Tokelau only).
2. S4.1.2: Collects details on wage and salary jobs each household member aged 15 and over held in country (within Tokelau) over the last 12 months.
3. S4.1.3: Collects details on wage and salary jobs each household member aged 15 and over held overseas over the last 12 months.

The rest of this section will be devoted to explaining how these three sections should be filled in, giving examples where appropriate.

6.2.1 Wages and salary: In-country (current) (15+ yrs) (S4.1.1)

When commencing to fill in this section, remember to refer back to section 1.2 in Module 1 to make sure all wage and salary jobs are covered in this table. Any activity listed in questions 10201 and 10206 in section 1.2 with a response of “03” or “04”, should be covered in this table.

Each row in this table represents a separate wage and salary job, so if a household member has two wage and salary jobs they should be listed separately in the table for S4.1.1.

Note:

Provide details of every wage and salary job a household member aged 15 and over currently has

Specific instructions for each question are as follows:

40101: Job Line number

This information is already provided and simply follows an alphabetic order for each different wage and salary job each household member currently held. The first job listed will take the value “a”, the second job “b”, and so forth. This letter must be referred to when providing details of each income generated from these jobs in S4.1.1 in the table below also.

40102: [HM]

This question simply asks for the [HM] number, or the person who has this wage and salary job. Remember that a household member can have more than one wage and salary job, so the [HM] number can appear more than once. It is extremely important that this [HM] number matches the [HM] number of the flap in module 1 so links can be made between the different modules.

40103: Occupation (activities undertaken)

This question requests a very brief description of each job the household members currently has. Activities undertaken can provide clues as to what sort of occupation one holds. Examples include:

- Customs officer
- Cleaning lady
- Security guard

40104: Industry (Employer)

This question asks for the name of the employer paying the wage and salary. If the person is working for a government, simply provide the name of the department or agency they work for. If they work for a private business, then provide the name of the business, preferably with some indications of what industry it's engaged in (trade, tourism, fisheries, transport...).

40105: Sector

This question simply requests information on whether the wage and salary job is with the government (public sector) or in the private sector. Enter “1” for public sector and “2” for private sector in the space provided. Church and NGO are identified separately and are coded respectively 3 and 4.

40106-40110: Income generated in the last 12 months

These next few questions are presented in a separate table below, and continue from where it left off in the previous table. These questions covers income generated from current jobs in-country, held by household members. These incomes could be in form of cash or in-kind income.

40106: Base salary before deduction

This question asks for the amount of regular payment received for that occupation (recorded in 40103) in cash. Provide the value in whole NZ dollar (\$). Record the amount received in the last 12 months from their employer. It may be the case that the employer provides some income in kind to the employee, and deduct them from the salary (house, car...). The base salary is the salary before any deductions.

40107: Overtime, bonuses, and commissions

This question asks for the amount of any other payments received (other than regular pay) from that occupation (recorded in 40103) in cash. These could be either overtime, bonuses and commissions. Provide the value in whole NZ dollars (\$). Record the amount received in the last 12 months from their employer.

40108: Housing allowance

This question asks for the amount of housing allowance provided in cash by the employer to the household member currently working. Housing allowance has been already mentioned in Module 2 section S2.2 (20217) and both questions have to match.

40109: Other: electricity, house, telephone, transport, clothing, food, etc

This question asks for the value of any other services such as house, utilities, communication, transportation including vehicles, clothing, food and any other items, goods or services received from employer as in-kind contributions for the household member's benefit. As the value of this type of payment will not always be known, a best guess is OK.

40110: Total wages and salary income for last 12 months

This question asks household members currently working to sum all wages and salaries received over the past 12 months and record it in the spaces provided. This should include both cash and in-kind benefits.

Example for – Wages and salary: In-Country (Current) (15+ yrs)

In this example, three members of a household aged 15 and above earn wages and salary from several jobs within the country. The first job, listed as “a” refers to job currently held by the head of the household, [HM] 01. He works as a Customs Officer for the Tokelau Customs Office and received an annual salary of about \$12,000, plus overtime pay amounting to \$1,500 and housing allowances for \$3,600 for a total income over the last 12 months of about \$17,100. The spouse, [HM] 02, holds job “b” and is a teacher at the primary school. She earns \$1,000 a month and she has started 9 months ago. She does not receive any “in-kind” contributions from her employer over the last 9 months. Finally, the son of the household head jobs is currently employed both as shop keeper at Tokelau shop earning \$4,200 and is sometimes working for the government of Tokelau as an interviewer (for the stats office) collecting about \$1,500 in the last 12 months.

S4.1.1 Wages and salary in country (current)

1. Yes ☒ Provide details below
2. No ☐ Go to S4.1.2

Reference period
last 12 months

CHARACTERISTICS OF THE JOB					
Job	[HM]	Occupation (Activities Undertaken)	Industry (Employer)	Sector 1. Public 2. Private 3. Church 4. NGO	NOTE ID
40101	40102	40103	40104	40105	40199a
a	01	custom officer	custom department	1	<input type="checkbox"/>
b	02	Teacher primary school	education department	1	<input type="checkbox"/>
c	03	shop keeper	Private shop	2	<input type="checkbox"/>
d	03	interviewer	stats office	1	<input type="checkbox"/>

The same household member is currently involved in 2 wage jobs

INCOME GENERATED IN LAST 12 MONTHS					
Job	Income (Cash)			Income (In kind) Other: electricity, telephone, house, transport, clothing, food, etc	TOTAL WAGES AND SALARY
	Base salary before deductions	Overtime, bonuses and commissions	Housing allowance (see module 2 question 20217)		
	NZD	NZD	NZD	NZD	NZD
40101	40106	40107	40108	40109	40110
a	\$ 12,000.00	\$ 1,500.00	\$ 3,600.00	\$, , .00	\$ 17,100.00
b	\$ 9,000.00	\$, , .00	\$, , .00	\$, , .00	\$ 9,000.00
c	\$ 4,200.00	\$, , .00	\$, , .00	\$, , .00	\$ 4,200.00
d	\$ 1,500.00	\$, , .00	\$, , .00	\$, , .00	\$ 1,500.00

6.2.2 Wages and Salary: In Country (Last 12 Months) (15+ yrs) (S4.1.2)

The information provided in this section relates to the details provided in S4.1.2. This section asks household members to provide details on jobs held in the last 12 months, but is no longer being held at the moment. Each household member who held a job, or several jobs in the last 12 months, are provided spaces for up to three jobs to fill out.

Important note

Provide details of every wage and salary job a household member aged 15 and over did in the last 12 months. Do not include jobs that are currently being held now.

Specific instructions for questions relating to this section are provided along with an example as needed.

40121: [HM]

This information asks for the [HM] number, or the person who had this wage and salary job in the last 12 months. Remember that a household member can have more than one wage and salary job, but spaces for only three jobs are provided. It is extremely important that this [HM] number matches the [HM] number of the flap in Module 1 so links can be made between the different modules.

40122: Occupation (Job 1)

This question requests a very brief description of the first job (Job 1) the household members held in the last 12 months. Activities undertaken can provide clues as to what sort of occupation one holds. Examples include:

- Nurse
- Teacher
- Cook
- Fisherman

40123: Salary last 12 months (Job 1)

This question asks household members to sum all wages and salaries received from job 1 over the past 12 months and record it in the spaces provided. This should include only salary income.

40124: Occupation (Job 2)

Similar to question 40122, this question asks for a brief description detailing the second job (Job 2), if any, that the same household member took on in the past 12 months.

40125: Salary last 12 months (Job 2)

This question asks household members to sum all wages and salaries received from job 2 over the past 12 months and record it in the spaces provided. This should include only salary income.

40126: Occupation (Job 3)

Similar to question 40122 and 40124, this question asks for a brief description detailing the third job (Job 3), if any, that the same household member took on in the past 12 months.

40127: Salary last 12 months (Job 3)

This question asks household members to sum all wages and salaries received from job 3 over the past 12 months and record it in the spaces provided. This should include only salary income.

Example for – Wages and salary: In Country (Last 12 Months) (15+ yrs)

In this example, the wife of the household head was a cleaning lady before she was a teacher. During the past 12 months she spent 3 months as a cleaning lady for private houses, and she earned \$400 a month.

1. Yes <input checked="" type="checkbox"/> Provide details below		Don't forget to include persons that were recorded in S1.6		Reference Period last 12 months	
2. No <input type="checkbox"/> Go to S4.1.3					
Other job	[HM]	Type of work (occupation)	Industry	Amount earned in last 12 months	NOTE ID
				NZD	
40121	40122	40123	40124	40125	40199b
a	02	cleaning lady	private houses	\$ 1,200.00	
b				\$, .00	

6.2.3 Wages and Salary: Overseas (Last 12 Months) (15+ yrs) (S4.1.3)

The information provided in this section relates to the details provided in S4.1.3 and asks household members to provide details on jobs held overseas in the last 12 months. Each household member who held a job overseas in the last 12 months, but is now living with the household, are asked to fill this section out.

Note

Provide details of every wage and salary job a household member aged 15 and over did overseas in the last 12 months.

Specific instructions for questions relating to this section are provided along with examples as needed.

40131: Overseas Job Line number

This information is already provided and simply follows an alphabet ordering for each different wage and salary job each household member held overseas in the last 12 months. The first job listed will take the value “a”, the second job “b”, and so forth.

40132: [HM]

This information asks for the [HM] number, or the person who had this wage and salary job overseas in the last 12 months. Remember that a household member can have more than one wage and salary job, so the [HM] number can appear more than once. It is extremely important that this [HM] number matches the [HM] number of the flap in Module 1 so links can be made between the different modules.

40133: Type of work

This question requests a very brief description of the type of work each household member held overseas in the last 12 months. Activities undertaken can provide clues as to what sort of occupation one holds. Members who used to live and work overseas but are now back living as part of the household may also include their previous jobs here if it's within 12 months. Examples include:

- Seamen
- Seasonal fruit pickers
- Other jobs...

40134: Industry

Similar as previous sections 4.1.1 and 4.1.2, the industry here refers to the employer domain, or the name of the employer.

40135: Country worked

This question asks for the country where the household members worked overseas in the last 12 months. Please write down the full name of the country in the space provided (Samoa, New Zealand...).

40136: Weeks worked overseas in last 12 months

This question asks for the number of weeks each household member worked overseas in the last 12 months for that particular job.

40137: Amount made in last 12 months

This question asks for the amount received for the work done overseas. Provide the value in whole New Zealand dollars (\$). Record the amount received in the last 12 months from their employer for that particular job.

Example for – Wages and salary: Overseas (Last 12 Months) (15+ yrs)

In this example, household member 3, did 2 trips overseas for jobs reason, he earned \$2, 500 in New Zealand, 2 months, picking fruits and he spent 1 month in Samoa as a builder, he earned \$1,000. The daughter (household member 4) spent 6 months in Samoa where she worked in a house of relatives as a house girl, they paid her \$5,000.

1. Yes <input type="radio"/> Provide details below 2. No <input type="radio"/> Go to S4.2					Don't forget to include persons that were recorded in S1.6		Reference Period last 12 months	
O'seas Job	[HM]	Type of work (occupation)	Industry	Country worked	Weeks worked o'seas in last 12 months	Amount earnt in last 12 months		NOTE ID
						NZD		
40131	40132	40133	40134	40135	40136	40137		40199c
a	03	fruit picker season	agriculture	New Zealand	08	\$ 2,500.00		
b	03	building house	construction	Samoa	04	\$ 1,000.00		
c	04	House lady	Private house	Samoa	24	\$ 5,000.00		
d						\$, .00		

6.3 Agriculture and forestry activities

This section of the income module covers income collected from small scale agriculture and forestry activities the household has been involved in over the last 3 months.

The section is divided into three components which address the following:

1. Characteristics of the agricultural and forestry activities;
2. Expenditure on agricultural and forestry activities; and
3. Income from agricultural and forestry activities.

Before going through each of the sections, the household is firstly asked if they had any member involved in any agriculture or forestry activities (question 40300). Agriculture activity came be market oriented or only for home consumption.

Notes

Any fruits and crops that grow in the yard/garden and consumed by any of the household members are considered as agriculture activities.

If a household member was working in a agriculture business operated by another household, for a wage and salary, then this persons income should be recorded in the wage and salary section (S4.1), and not here.

Details of each section are as follows:

6.3.1 Characteristics of the agriculture and forestry activities (40301 – 4307)

40201: HM aged 15 and above involved in this activity

This question aims at listing the household members *aged 15 and above* associated with this activity, starting with the person in charge of the activity, which in most cases is the owner himself/herself. Only the [HM] numbers need to be entered in the spaces provided. Room is provided for 10 [HM], which should be plenty of room. If more than 10 [HM], please list the first 10 [HM] who spends the most time doing these activities. In this context, the time spent on an activity signifies its importance to the household.

40202: Apart from the hh members, have you paid anyone to work in this activity during the past 3 months?

This question seeks information on whether the household employed someone outside the household to work on (to help) the production of agriculture and forestry products. While this is unlikely, it may occur, and has thus been included. If a code of “1” is recorded for this question, make sure labor expenses in the following question are provided in the next section below (40208).

40203: During the past 3 months, what was the main arrangement under which you worked on agricultural land?

This question seeks to determine which form of land arrangement governs the land which the household is using to conduct its agricultural or forestry activities on. Three possible types of land arrangements are provided below:

- **“1” Custom ownership:** A form of land tenure system where land is administered by customary laws, usually involving inheritance of such lands from past predecessors.
- **“2” Own land (freehold):** A type of land arrangement where the land and all immovable structures on that piece of land is purchased outright and owned freely with no time requirements on the duration of ownership.
- **“3” Rent (lease):** A form of land arrangement allowing the tenant/leaser temporary rights to a parcel of land for a given length of time after making regular payment with the lessor.

40204: Did you use any land under "freehold" or "lease" in the last 3 months?

This question asks households to determine whether any “freehold” or “leased” land parcel was used to carry out the agricultural or forestry activity on. If so enter “1” for yes then move to the next question. If no enter “2” for no then move on to the next question.

40205: How many visits of an agriculture extension agent did you receive during the last 3 months?

This question attempts to find out if the household’s farm or forestry project was visited by an agricultural extension agent within the last 3 months. If so, record the number of times they visited in the space provided.

40206: Did you participate in any "producer organization" (cooperative)?

This question aims to determine whether the household member in charge of the agricultural or forestry activity participated in any producer organization such as a farmers’ cooperative organization or local produce market within the last 3 months. If so enter “1” for yes then move to the next question. If no enter “2” for no then move on to the next question.

402307: Did you use the microcredit to develop your agricultural activities?

This question aims to determine if the household took out a small loan (micro credit financing) from a **bank**, a business entity or a micro creditor to develop the agricultural or forestry activity reported. If so enter “1” for yes then move to the next question. If no enter “2” for no then move on to the next question.

6.3.2 Expenditure on agriculture and forestry activities (40208)

40208: Over the past 3 months, did you spend money on the following items?

This question aims to cover all expenditures spent by the household on any agriculture/forestry activities over the last three months. A total of five expenditure categories have been identified for this question with a brief explanation of each as follows:

- 1) **Transport:** If any agriculture/forestry activities required the households to pay transport costs to move their produce from their farming location to a common market place, then a rough estimate of these transport costs over the last 3 months should be provided here.
- 2) **Labor:** If the household reported employing additional labor in question 40302, then the wage paid to these persons over the last 3 months should be recorded here. Remember to include cash payments and in-kind payments.
- 3) **Fencing and closure:** all the materials bought to build fences, gates for agriculture, gardening purposes.
- 4) **Rental of equipment:** If farming equipment was rented in the last 3 months by the household to improve production in its agriculture/forestry activities then include it here.

- 5) Other (seeds, fertilizer): This section covers any other expenses associated with producing agricultural/forestry products such as the purchase of seeds/fertilizer and forestry planting materials. Only include purchases in the last 3 months.

After completing the expenses for each of these 5 expenditure categories, then provide the total amount in the space provided.

6.3.3 Income from agriculture and forestry activities (40252 – 40299)

40252: Vegetables, root crops, fruits, other crops and forestry products

This question lists all the different vegetable, root crops, fruits, other crops or forestry products expected to be produced in Tokelau. It is by no means an exhaustive list, so for each section on vegetable, root crops and fruits a category “other” has been provided in case it’s needed. Please collect the information and reference it on column 40299 “Obs”. No information needs to be added for this question, it is more for reference when filling in the remaining sections of this table.

40253: Did you harvest? (Have to be filled in, do not leave it blank)

This question simply asks if the household harvested any vegetable, root crops, fruits, other crops or forestry products in the last 3 months. If so, then record a response of “1” for yes next to the item and move on. If this product was not produced then record a response of “2” for no and move on to the next item.

40254: Did you sell? (Have to be filled in, do not leave it blank)

This question is similar to the previous question, but now asks the household whether or not they sold any of their produce/products in the last 3 months. Once again provide a response of “1” for yes, and “2” for no.

40255: If you sold your production or part of it, how much did you earn? (Have to be filled in, do not leave it blank if 40254 = 1)

This is the most important question for this section and aims to record the amount from total sales over the last 3 months for each product listed. It is not expected that households will be able to provide a very accurate answer for this question, so make sure you advise that a “best guess” is better than nothing.

Note

Households will generally not know how much money they made from sales of agriculture produce over the last 3 months, so insist a best guess is acceptable. This is better than leaving the response blank.

Once the earnings for all agriculture products have been added together, then record the total in the space provided.

Note

Households don’t normally undertake these activities with the intention of losing money. So if the expenses over the last 3 months are greater than the income, it may be worthwhile checking with the household that this is correct.

Example for Agriculture and Forestry Activities

In this example the household in question produced as well as sold some of the following products listed below. Please note that when other products are produced besides the ones listed, these must be listed as “others (note)” and further specified in any Note box available in this section.

I. Harvest Only

1. Coconut

II. Harvest and Sold

1. Cucumber

2. Breadfruit
3. Banana
4. Eggplant
5. Mango
6. Pawpaw
7. Limes

2 Yam

					Reference period last 3 months	
Agriculture or Forestry Item		Did you harvest? 1. Yes 2. No	Did you sell? 1. Yes 2. No	If you sold your production or a part of it how much did you earn?	NOTE ID	
40251	40252	40253	40254	NZD 40255	40299b	
Vegetables						
01	Cabbage (Head/Chinese)	2		\$, .00		
02	Cucumber	1	1	\$, 200.00		
03	Beans	2		\$, .00		
04	Pumpkin	2		\$, .00		
05	Pepper (Chilli and Bell)	2		\$, .00		
06	Eggplant	1		\$, .00		
07	Tomato	2		\$, .00		
08	Green onion	2		\$, .00		
09	Other (note)	2		\$, .00		
Rootcrops						
10	Taro (all types)	2		\$, .00		
11	Yam	1	1	\$, 500.00		
12	Taamu	2		\$, .00		
13	Sweet potato	2		\$, .00		
14	Other (note)	2		\$, .00		
Fruits						
15	Mango	1		\$, .00		
16	Coconut - drinking	1		\$, .00		
17	Coconut - other	1		\$, .00		
18	Breadfruit	1		\$, .00		
19	Banana	1		\$, .00		
20	Lime/lemon	1		\$, .00		
21	Pawpaw	1		\$, .00		
22	Noni	2		\$, .00		
23	Other (note)	2		\$, .00		
Total amount				\$, 700.00		

6.4 Fishing, hunting and gathering

This section covers income collected from fishing, hunting and gathering activities that the household has been involved in over the last 3 months.

The section is also divided into three components which address the following:

- Characteristics of the fishing, hunting and gathering activities

- Expenditure on fishing, hunting and gathering activities
- Income from fishing, hunting and gathering activities

Before going through each of these sections, the household is firstly asked if any members were involved in any of these activities (40300). Make sure reference is made to all of the activities covered in this section – fishing, hunting and gathering. Once again, feel free to refer to the list provided in S4.3.2 to guide the household as to whether or not they are involved in these activities.

Details of each section are as follows:

6.4.1 Characteristics of the fishing, hunting and gathering activities (40301 – 40307)

40301: [HM] aged 15 and over involved in this activity

This question aims at listing the household members aged 15 and above who are associated with this activity, starting with the person in charge of the activity, which in most cases is the owner himself/herself. Only the [HM] numbers need to be entered in the spaces provided. Room is provided for 10 [HM], which should be plenty of room. If more than 10 [HM], please list the first 10 [HM] who spends the most time doing these activities. In this context, the time spent on an activity signifies its importance to the household.

40302: Apart from the hh members, have you paid anyone to work with you in your fishing, gathering and hunting activities?

This question seeks information on whether the household employed someone outside the household to assist in the fishing, gathering and hunting activities.

Note

Do not include payments in kind consisting of fish drawn from the catch and distributed to other crew members. Only include cash payments, or other in-kind payments apart from the fish caught that day.

So if the household paid for someone to assist them on their boat fishing, with either money or an in-kind payment which was not fish from the catch, then mark “1” for yes in this question, otherwise mark “2” for no. If a code of “1” is recorded for this question, make sure labor expenses are provided in the follow-up section (40308) on expenditure.

40303: What type of methods were carried out by members of this household for each activity?

This question asks [HM] to specify the types of methods they undertook in the past 3 months. The main methods used are as follows:

Fishing

- Trolling: A method of fishing where one or more fishing lines, baited with lures or bait fish, are drawn through the water.
- Bottom fishing: A type of fishing commonly used to catch bottom dwelling fish, usually with a weight and hook tied somewhere near the end of the line.
- Casting (hand line/pole): The act of throwing bait or a lure secured to a fishing line out over the water using a flexible fishing rod, or just a hand line alone.
- Spear/Harpoon: A method of fishing involving the use of spear guns, pole spear or harpoon, often with the aid of a rubberized elastic band to impale the fish on the spear.
- Net fishing: Covers several types of net fishing techniques particularly those involving the use of gill nets and cast nets.
- Vertical long line.

- g. Other: Any other fishing technique used

Other Sea Gathering

- h. Spear/Harpoon: A method of gathering crustaceans involving the use of spear guns, pole spear or harpoon, often with the aid of a rubberized elastic band to impale the crustacean on the spear
- i. Trap: Include the use of both traditional and modern traps.
- j. Line: Involves the use of a handline for capturing (generally used for squid)
- k. Other: Any other technique used for gathering seafood

Hunting

- l. Shooting: Involves the use of a firearm to kill the prey – commonly used for wild birds, fruit bats and wild pigs
- m. Traps: Include the use of both traditional and modern traps
- n. Other: Any other technique used for hunting

40304: In which location do members of your household fish, gather and hunt?

This question asks where members of the household typically fish, gather and hunt.

Fishing

- a. Open ocean: Refers to the open water beyond the reef.
- b. FAD fishing: Refers to fish aggregating devices consisting of buoys or floats tethered to the ocean floor as a means to attract ocean going pelagic fish such as tuna, marlin and mahi-mahi.
- c. Outer reef: Refers to coral reefs located at a distance away from the mainland, and providing a great source of marine life.
- d. Coastal reef: Refers to coral reefs occurring near and parallel to a coastline.
- e. Submerged reef: are reefs that are totally underwater and could be found near shore or out in the open ocean. These submerged reefs attract a wide variety of marine organisms and serves as ideal fishing grounds in most places.
- f. Lagoon: A shallow body of water separated from a larger body of water by a surrounding islands or reefs.
- g. Other: Any other location used for fishing

Gathering

- h. Mangrove: Refers to areas where various types of trees that grow in salty coastal zones are found and provides an excellent location for in-shore fishes and other marine organisms to thrive
- i. Reef: Refers to gathering marine life on any reef base, regardless of its proximity to the mainland
- j. Beach: Refers to collecting marine life along the beach (small crustaceans would be an example of such marine life found in this environment)
- k. Coastal Sea: Involves the gathering of marine life along the coast in the sea (squid, turtle and sea-cucumber would often be gathered in this environment)
- l. Other: Covers any other environment where marine life (other than fish) may be gathered

Hunting

- m. Forest: Refers to areas with heavy tree life where wildlife use as a home for food and shelter
- n. Other: Covers any other environment where hunting may occur

40305: How many times on average do members of this household fish in a typical month?

This question asks the average number of fishing trips that member of the household typically takes in a month.

40306: On average, how many hours do members of the household fish per trip?

This question asks the average number of hours it takes for members of a household to fish in each fishing trip.

40307: Main fishing mean or mode of transport to fishing site?

This question requires household members to list their main mode of transport to the fishing site. The following 4 options are provided to help households select the best one that is applicable to them:

- 1) Motorized boat: These are boats with an outboard motor attached to it.
- 2) Non-motorized boat: These are boats with no outboard motor. Rafts and canoes with no engine may also be included here.
- 3) Walk/Drive: In some locations where the fishing site nearby, walking/driving may be the most appropriate mode of transport.
- 4) Swim: Similarly, swimming to a fishing site is also quite possible for those areas that are close to the shoreline.

6.4.2 Expenditure on fishing, hunting and gathering activities (40308)

40308: Over the past 3 months, did you spend money on the following items?

This question aims to cover all expenditures which occurred with this business activity over the last three months. A total of seven expenditure categories have been identified for this question with a brief explanation of each as follows:

- 1) Purchase of fishing equipment: Any fishing equipment the household members may have purchased in the last 3 months should be included here. Expenses on fishing rods, hand lines, lures, etc should all be covered here
- 2) Transport of catch: The sort of expenses to include here are any costs of transporting the fish from the boat ramp to the market. These are not expected to be many as persons willing to purchase fish are often waiting at the boat ramp.
- 3) Labor: If the household reported employing additional labour in question 40602, then the wage paid to these persons over the last 3 months should be recorded here. Remember to include cash payments and in-kind payments (but not fish catch).
- 4) Ice: If the household purchases ice when it go out fishing to keep the catch fresh then record the total amount spent on ice for these purposes over the last 3 months.
- 5) Other: This section covers any other expenses associated with fishing, hunting and gathering, such as bait for fishing, etc. Only include these expenses in the last 3 months.

After completing the expenses for each of these 7 expenditure categories, then provide the total amount in the space provided.

6.4.3 Income from fishing, hunting and gathering activities (40309 – 40313)

This section covers all the different types of fishing, gathering and hunting activities that the household may be involved in during the past 3 months. It is divided up in 3 broad categories as follows:

1: Fishing Activities

- a) Tuna
- b) Wahoo
- c) Mahi Mahi
- d) Reef Fish, etc

2: Other Sea Gathering Activities

- a) Lobster
- b) Crabs
- c) Squid, etc

3: Hunting Activities

- a) Wild birds
- b) Wild pig
- c) Fruit bat, etc

The specific questions asked to collect these information on are as follows:

40351: Fishing, hunting and gathering activity-broad category

This question categorizes and numbers the various fishing/hunting and gathering activities into the 2 broad categories identified above: Fishing and Gathering at Sea and land activities.

40352: Fishing, hunting and gathering activity-detailed

This question provides a detailed listing of the different types of fishing, hunting and gathering activities commonly carried out in Tokelau. As can be seen, a large amount of detail has been included in this question, largely due to the importance of these activities to everyday life in Tokelau. A category of “other” has been provided for each section to ensure completeness and make sure nothing is missed for this section. No information needs to be added for this question, since it is more for reference when filling in the remaining sections of this table.

40353: Did you catch?

This question simply asks if the household caught any of those species in the last 3 months, and if so to record a response of “1” for yes next to the item. If this species was not caught by the household then record a response of “2” for no next to the item.

40354: Did you sell?

This question is similar to the previous question, but now asks the household whether or not they sold any of their catches in the last 3 months. Once again provide a response of “1” for yes, and “2” for no.

40613: If you sold your catches or a part of it, how much did you earn?

This is the most important question for this section and aims to record the amount from total sales over the last 3 months for each fishing, hunting and gathering activity. It is not expected that households will be able to provide a very accurate answer for this question, so make sure you advise that a “best guess” is better than nothing.

Rule

Households don't normally undertake these activities with the intention of losing money. So if the expenses over the last 3 months are greater than the income, it may be worthwhile checking with the household that this is correct.

Example for Fishing, Hunting and Gathering Activities

The household head caught and sold Skipjack, Yellow Fin, Reef Fish (Diving with Spear). His wife caught crabs from the mangrove. They also caught for their own consumption Wahoo, Octopus and land Crab.

Reference period last 3 months					NOTE ID
Fishing/Hunting/Gathering activities	Did you catch? 1. Yes 2. No	Did you sell? 1. Yes 2. No	If you sold your catches or a part of it how much did you earn?		
			NZD		
40351	40352	40353	40354	40355	40399b
Fishing activities					
01	Tuna (skipjack)	1	1	\$ 150.00	
02	Tuna (yellow fin and bigeye)	1	1	\$ 80.00	
03	Tuna (other)	2	2	\$.00	
04	Wahoo	1	2	\$.00	
05	Mahimahi	2	2	\$.00	
06	Other large pelagic (eg: rainbow runner)	2	2	\$.00	
07	Bill fish (marlin, sailfish, etc)	2	2	\$.00	
08	Sharks (all species)	2	2	\$.00	
09	Coastal pelagic (trevally, barracuda, etc)	2	2	\$.00	
10	Reef fish (parrot fish, snapper, moonfish, etc)	1	1	\$ 200.00	
11	Grouper	2	2	\$.00	
12	Other fish	2	2	\$.00	
Other sea gathering activities					
13	Lobster	2	2	\$.00	
14	Mangrove crab	1	1	\$ 20.00	
15	Crab (land crab, coconut crab, etc)	2	2	\$.00	
Total amount				\$ 450.00	

6.5 Livestock and aquaculture

This section of the income module covers income collected from livestock and aquaculture activities that the household has been involved in over the last 12 months.

Note

While the other sections on subsistence based income (agriculture, handicrafts and fishing) all have recall periods of 3 months, this section on livestock and aquaculture has a 12 month recall period due to the less frequent occurrence of activity in this area.

The section is also divided into three components which address the following:

- Characteristics of the livestock and aquaculture activities
- Expenditure on livestock and aquaculture activities
- Income from livestock and aquaculture activities

Before going through each of these sections, the household is firstly asked if they had any member involved in any of these activities (40400), the main categories of livestock a household is likely to have are pigs and chicken, but ducks may also exist in smaller numbers. For aquaculture, the main categories are identified as clams, crab and milkfish.

Details of each section are as follows:

6.5.1 Characteristics of the livestock activities (40401 – 40404)

40401: [HM] aged 15 and over involved in this activity

This question aims at listing the household members associated with this activity, starting with the person in charge of the activity, which in most cases is the owner himself/herself. Only the [HM] numbers need to be entered in the spaces provided. Room is provided for 10 [HM], which should be plenty of room. If more

than 10 [HM], please list the first 10 [HM] who spends the most time doing these activities. In this context, the time spent on an activity signifies its importance to the household.

40402: *Apart from the hh members, have you paid anyone to work with you in your livestock activities?*

This question seeks information on whether the household employed someone outside the household to assist in raising its livestock. While this is unlikely, it may occur if a household has a large amount of livestock, and has thus been included. If a code of “1” is recorded for this question, make sure labor expenses are provided in the follow-up section (40505) on expenditure. Otherwise, record “2” for no.

40303: *Apart from the hh members, have you paid anyone to work with you in your aquaculture activities?*

This question seeks information on whether the household employed someone outside the household to assist in raising its aquaculture. While this is unlikely, it may occur if a household has a large aquaculture operation, and has thus been included. If a code of “1” is recorded for this question, make sure labour expenses in the following question are provided in the follow-up section (40308) on expenditure. Otherwise, record “2” for no.

40404: *Do you have livestock?*

This question aims to collect information on whether the household has any of the common types of livestock and aquaculture. The key categories are:

- | | |
|--------------|-----------------|
| I. Livestock | II. Aquaculture |
| 1. Pigs | 1. Clams |
| 2. Chicken | 2. Crab |
| 3. Other | 3. Other |

For livestock, the household is required to provide two pieces of information:

- Do they have these livestock? Yes = 1, and No = 2
- How many? (currently)

For aquaculture, the household is required to report whether or not it is involved in cultivating aquatic animals. It is not required, however, to list “how many” of each organism it’s raising.

6.5.2 Expenditure on livestock and aquaculture activities (40405)

40405: *Over the past 12 months, did you spend money on the following items?*

This question aims to cover all expenditures which occurred with livestock and aquaculture activities over the last 12 months. A total of seven expenditure categories have been identified for this question with a brief explanation of each as follows:

- 1) Feed: This expense covers the cost of any feed a household purchases to feed pigs and chickens. Don’t include leftover food scraps from the dinner table, copra and other locally gathered feed material in this category, as these are not paid for in the first place. All feed costs over the last 12 months should be included.
- 2) Fencing and enclosure: Include any costs over the last 12 months for building an enclosure to store livestock such as pigs and chickens, and aquatic organisms such as clams and crabs.
- 3) Transport: If transport costs exists for moving the livestock from the home to a market place, then include the total costs of this transport over the last 12 months
- 4) Purchase of animals: If the livestock was purchased in the last 12 months (ie, the household bought 2 piglets to raise), then record the costs of those livestock here.

- 5) Labor: If the household reported employing additional labour in questions 40502 and 40403, then the wage paid to these persons over the last 12 months should be recorded here. Remember to include cash payments and in-kind payments.
- 6) Veterinary: If the household had to pay for a vet or an aquaculture expert to see the livestock or aquatic organisms in the last 12 months, then record those expenses here.
- 7) Other: This section covers any other expenses associated with raising livestock or aquaculture organisms. Only include these expenses in the last 12 months.

After completing the expenses for each of these 7 expenditure categories, then sum everything up and provide the total amount in the space provided.

6.5.3 Income from livestock and aquaculture activities (40406 – 40411)

40451: Livestock and Aquaculture – Broad Categories

This question categorizes and numbers the various activities into the 2 broad categories identified above: Livestock and Aquaculture.

40452: Livestock and Aquaculture – Detailed Categories

This question lists the different livestock and aquaculture animals commonly found. As can be seen, only three key live stocks are listed in the table, “Pigs”, “Chickens” and “Duck”, with any remaining reserved for the “Other” category just in case another type of livestock is encountered during the survey. Similarly, only “Clam”, “Crab” and “Milkfish” are identified as major aquaculture organisms with a “Other” category just in case. No information needs to be added for this question, since it is more for reference when filling in the remaining sections of this table.

40453: Did you sell?

This question simply asks the household if they sold any of their livestock or aquaculture products in the last 12 months, with a simple yes/no response required. Provide a response of “1” for yes, and “2” for no.

40454: If you sold livestock/aquaculture products, how much did you earn?

This is the most important question for this section and aims to record the amount from total sales over the last 12 months for each livestock/aquaculture category. It is not expected that households will be able to provide a very accurate answer for this question, so make sure you advise that a “best guess” is better than nothing.

Once the earnings for all livestock and aquaculture have been added together, then record the total in the space provided.

Note

Households don’t normally undertake these activities with the intention of losing money. So if the expenses over the last 12 months are greater than the income, it may be worthwhile checking with the household that this is correct.

Example for Livestock Activities

In this example the household surveyed raises many pigs and chickens and clams over the last 12 months and claimed they sold:

- 1) 2 pigs for \$200 each and 1 pig for \$300
- 2) Roughly 25 chicken for \$4 each
- 3) 5 giant clams for \$10 each

				Reference period last 12 months
Livestock and Aquaculture activities		Did you sell? 1. Yes 2. No	If you sold livestock or aquaculture how much did you sell it for? NZD	NOTE ID
40451	40452	40453	40454	40499b
Livestock				
01	Pigs	1	\$ 700.00	<input type="checkbox"/>
02	Chickens	1	\$ 100.00	<input type="checkbox"/>
03	Other (note)	2	\$.00	<input type="checkbox"/>
Aquaculture				
04	Clam	1	\$ 50.00	<input type="checkbox"/>
05	Crab	2	\$.00	<input type="checkbox"/>
06	Other (note)	2	\$.00	<input type="checkbox"/>
Total amount			\$ 850.00	<input type="checkbox"/>

6.6 Handicrafts

This section of the income module covers income collected from small scale activities relating to handicrafts the household has been involved in over the last 3 months.

The section is once again divided into three components which address the following:

- Characteristics of handicraft, activities
- Expenditure on handicrafts activities
- Income from handicrafts activities

Before being sent through each of these sections, the household is firstly asked if they had any member involved in any of these activities (question 40500). To help determine this, refer the household to the list provided in S4.5.2 which details the key types of handicraft in Tokelau.

Details of each section are as follows:

6.6.1 Characteristics of the handicraft activities (40501 – 40502)

40501: HM aged 15 and above involved in this activity

This question aims at listing the household members associated with this activity, starting with the person in charge of the activity, which in most cases is the owner himself/herself. Only the [HM] numbers need to be entered in the spaces provided. Room is provided for 10 [HM], which should be plenty of room. If more than 10 [HM], please list the first 10 [HM] who spends the most time doing these activities. In this context, the time spent on an activity signifies its importance to the household.

40502: Apart from the hh members, have you paid anyone to work with you in producing handicraft items in the past 3 months?

This question seeks information on whether the household employed someone outside the household to assist in the production of the handicraft. While this is unlikely, it may occur, and has thus been included. If a code of "1" is recorded for this question, make sure labor expenses in the following question are provided.

6.6.2 Expenditure on handicraft activities (40503)

40503: Over the past 3 months, did you spend money on the following items?

This question aims to cover all expenditures which occurred with this business activity over the last three months. A total of five expenditure categories have been identified for this question with a brief explanation of each as follows:

- 1) Materials for making handicrafts: If the household make handicrafts which involve purchasing some items in order to produce the handicraft (e.g., items for making hair pieces) then include the cost of those items here.
- 2) Transport: If transport costs exists for moving the handicraft from the home to a market place, then include the total costs of this transport over the last 3 months
- 3) Labor: If the business reported employing additional labor in question 40402, then the wage paid to these persons over the last 3 months should be recorded here. Remember to include cash payments and in-kind payments.
- 4) Other: This section covers any other expenses associated with producing handicrafts Only include these expenses in the last 3 months.

After completing the expenses for each of these 5 expenditure categories, then provide the total amount in the space provided.

6.6.3 Income from handicraft activities (40552 – 40599)

40552: Handicrafts

This question lists all the different handicraft items expected to be produced in Tokelau. It is by no means an exhaustive list, so for each section a category “other” has been provided, in case it’s needed. Please collect the information and reference it on column 40599 “note” then indicate it in the observation box provided at the bottom of the page. No information needs to be added for this question, it is more for reference when filling in the remaining sections of this table.

40553: Did you produce?

This question simply asks if the household produce any handicrafts in the last 3 months, and if so to record a response of “1” for yes next to the item. If this product was not produced then record a response of “2” for no next to the item.

40554: Did you sell?

This question is similar to the previous question, but now asks the household whether or not they sold any of their produce in the last 3 months. Once again provide a response of “1” for yes, and “2” for no.

40555: If you sold your production or part of it, how much did you earn?

This is the most important question for this section and aims to record the amount from total sales over the last 3 months for each product listed. It is not expected that households will be able to provide a very accurate answer for this question, so make sure you advise that a “best guess” is better than nothing.

Once the earnings for handicrafts have been added together, then record the total in the space provided.

Note:

Households don’t normally undertake these activities with the intention of losing money. So if the expenses over the last 3 months are greater than the income, it may be worthwhile checking with the household that this is correct.

6.7 Income from non-subsistence business

The second section of the income module covers income collected by business owners over the last 12 months from business activities which are not considered subsistence based income activity. These include business activities such as:

- Shop owners
- Restaurants
- Mechanics/Electronic/Construction
- Car rentals

The information collected covers three major areas:

1: Characteristics of the business:

- Collects details about the business, including which household members are involved in the business, and how long they have been operational.

2: Estimates of “Gross Revenue”, “Expenses” and “Net Profit”:

- Collects information on the “gross revenue”, “expenses” and “net profit” generated from the business activities over the last 12 months.

3: Breakdown of expenses

- Collects a detailed breakdown of the types of expenses the business has incurred during its operations over the last 12 months.

Before covering these sections, the household is asked a lead-in question first if any of its members are involved in any of the above non-subsistence business activities (40600). If the answer is “yes”, then proceed to the next item 40602. Otherwise, if the answer is “no”, then no more questions are asked in this section and the interviewer is instructed to move on to the next section (S4.6.1).

This question (40600) is simply aimed at determining if a household member was collecting this type of income in the last 12 months. In order to assist in identifying potential people in the household involved in non-subsistence business activities, refer to question 1.2 in Module 1. If a person in the household reported activities “01” and “04” for question 10201 or 10206, then the income details should be recorded in this question.

It’s important to note that only those persons who were involved in the running of the business should be reporting they were involved in non-subsistence business activities. If they were an employee of such a business, their income should be recorded in question 4.1 on wages and salary.

The rest of this section will be devoted to explaining how to fill out the three areas outlined above, giving examples where appropriate.

6.7.1 Characteristics of the business (40602-40610)

40602: Description of business

If the business is well known in Tokelau enter the business name for this section, as this will be enough to determine in the office the type of industry that business refers to. If the business is not as well known, then a brief description of what the business does can be entered here. A few examples have been provided in the question to assist with the process.

40603-40606: Household members involved in this business

For the business activities to be listed in this question, a member of the household has to be the owner of the business. Once it has been established that this business is run by a household member, record the [HM] numbers of each person involved in the business, starting with the owner first. If this is not the case then all household members involved in the business are employees of the business, and therefore should be recording their details in S4.1 in the wages and salaries section.

40607: Where do you operate this business?

This question asks where the business is operated from. There are three options presented for this question, with codes presented under the table:

1. At home: business is run at home by the household (eg a shop attached to the family home).
2. Other location – within Tokelau: business is located away from the household, but still based in Tokelau.
3. Other location – outside Tokelau: business is located overseas, but still run by a member of the household.

Provide the code which best describes this location for each business listed here.

40608-40609: For how long has this enterprise been operating?

These two questions aim to determine how long the business has been operational. There is a space to enter a figure in years and months. Different scenarios can exist for the length of a business operation:

Scenario 1) If the business has been operating for many years, there is no need to record any figure in the months section, just provide a best guess as to the number of years.

Scenario 2) If the business has been operating for less than a year, simply record the number of months the business has been operating.

Scenario 3) If the business has been operating for 2 ½ years, then you can record the number 2 in the years section and 6 in the months section.

Estimates of “Gross Revenue”, “Expenses” and “Net Profit” (40610-40615)

40610: How many workers from outside the household also work in this business?

This question aims to determine how many persons outside of the household work in the business during a typical month. If the business is only operated by household members then record a value of “0” for this question. If the number of non-household members working for the business changes each month, then simply record an average number of non-household members working at any time.

40611: Gross revenue

As stated in the questionnaire, gross revenue covers the “raw” sales income, which is equivalent to the amount customers actually pay the company when they make their purchases. In the majority of cases, households are not expected to know this amount to any great level of precision. For this reason, it is important that the interviewer stress only a rough guess will be sufficient when respondents are not sure.

40612: Expenses

Expenses cover all costs associated with running the business. A list of all different expense types is provided at the bottom of this page. This list covers:

- | | | | |
|----------------------|-------------------------|---------------------------|---------------|
| 1) Salaries to staff | 5) Communications | 9) Building – Rental | 13) All Other |
| 2) Goods for resale | 6) Fuel | 10) Equipment - Rental | |
| 3) Electricity | 7) Raw Materials | 11) Registration/Licenses | |
| 4) Water | 8) Repair & Maintenance | 12) Equipment | |

A best guess estimate of the total expenses incurred by the household should be included here. As with Gross Revenue, in the majority of cases, households are not expected to know this amount to any great level of precision. For this reason, it is important that the interviewer stress only a rough guess will be sufficient when respondents are not sure.

40613: Net profit

The Net Profit is what money the business owners actually take home from the business. It should be the difference between the Gross Revenue and Expenses. When completing this question, make sure the difference between these two values adds to the “Net Profit”. If there is a discrepancy, then explain to the respondent that these three figures should all link, and see if you can determine where the discrepancy lies and amend the figures.

40614: Are these profits for: 1) the entire business or, 2) just this HHs share ?

This question aims to determine if the profits recorded in the previous question were for the entire business including other partners, or just the share of the household members. If the profits were for the entire business then enter a code value of “1” for yes. If the profits were only for the household members share, then enter a code value of “2” for no. In the case where the household members are the sole owners of the business, which will often be the case, then enter a value of “1”.

40615: What share of the profits is kept by the household?

This question records the share of profits which are kept by household members. This value will be 100% if the household report they own the business outright. If the household report they are in partnership with someone outside the household then estimate the share of profits, as a percentage, by the household members. NB: This question should only be answered for businesses that recorded an answer of “1” for the previous question.

6.7.2 Breakdown of expenses (40616 – 40626)

40616: Did this business report any expenses in 40612 above?

This question aims to determine if the business the household was involved in paid expenses over the last 12 months. While it may be possible that there were no expenses, it will be far more likely that there should be, so most often the household should be reporting a “1” for this question to signify yes. If there were no business expenses, then record a “2” for no, and there are no more questions for this business.

40617 – 40626: Expense code and percentage contribution

The next set of questions aims to determine what the breakdown for expenses were for the business. Obtaining accurate information for this question will be extremely difficult, so we are only trying to get a rough guess. In order to achieve this, we have provided a list of the main 12 business type expenses listed above, and simply ask the household what the key expenses for each business, outlined in this question, are.

Once the household has identified the key business expense items, the interviewer needs to record what the rough breakdown is for each expenditure. For example, if a business identifies two different expenditure items, “salaries to staff (code 1)” and “electricity (code 3)”, and both contributed the same amount to expenses, then the question should be filled in as follows:

Additional details for each of the 12 different expenditure types is as follows:

- 01) Salaries to staff (exclude HM): Covers salaries paid to workers in the business which are not household members.
- 02) Goods to resale: Mostly applicable to store owners, and covers the cost of goods bought, to sell in the store
- 03) Electricity: Covers only electricity used for operating the business
- 04) Water: Covers only water used for operating the business
- 05) Communications: Covers telephone bills and use of mobile phones for business operations
- 06) Fuel and Oil: Particularly relevant for transport orientated businesses
- 07) Raw materials: Covers expenses on raw materials used in the construction of things such as buildings
- 08) Repair and maintenance: Covers the cost of maintaining business assets, including any buildings in which the business operates from

- 09) Building rental: Applicable to business which are using someone else premises for their business and as such, need to pay rent
- 10) Equipment rental: Applies to businesses which rent equipment (eg, for construction purposes)
- 11) Registration / License / Insurance: Once again mostly applicable to transport orientated businesses
- 12) Equipment: Covers the cost of purchasing equipment solely for use in the business

Note

The sum of the expenditure breakdown (40618, 40620, 40622, 40624, 40626) should equal total expenditure.

Example for non-subsistence business question

In the following example, six members of the household were involved in business activities:

Business 1

Household head runs a mechanic business which has been running for 11 years now, and his oldest son helps out. They have 3 other people working in the business which are employees of the household head. He pays these employees a wage, but all profits of the business go to the household head and his son. The business estimated making \$48,600 last year. The expenses for the business in the last 12 months were roughly \$8,000, of which 70% was for salaries, 15% for electricity, 5% for communication and 10% for equipment.

Business 2

The household head's wife looks after a shop attached to the house, along with the help of their 2 daughters. The shop has been there for 2 years and 4 months. The shop sold stock valued at roughly \$4,500 last year. The expenses incurred for the shop over the last 12 months were around \$2,500. They only have expenses for goods to resale (about 95%), and electricity (about 5%).

Business 3

The household head's other son has recently started a plumbing business with his cousin from another household 6 months ago. They have no employees. In the last 6 months the business made roughly \$17,000. The expenses for the business in this period were only around \$700, comprising roughly communication (10%), car registration (10%), fuel (20%), and equipment (60%).

1. Yes ☒ Provide details below
 2. No ☐ Go to S4.7

Reference period
last 12 months

Characteristics of the business

Business code no.	Description of business eg: Small store selling food, Restaurant, Car rental business, Provide mechanic service	[HM] involved in this business (start with owner first)				Where do you operate this business from? 1. At home 2. Other location - within Tokelau 3. Other location - outside Tokelau	For how long has the enterprise been operating?		NOTE ID
		[HM] No	[HM] No	[HM] No	[HM] No		Years	Months	
40601	40602	40603	40604	40605	40606	40607	40608	40609	40699
01	Mechanic services	01	03			2	11		
02	Shop owner	02	05	06		1	02	04	
03	Plumber	04				2		06	
04									
05									

Business code no.	How many workers from outside the household also work in this business?	Gross Revenue	Expenses	Net Profit	Are these profits for: 1: Entire business 2: Just this HH's share If 2, go to 40616	What share of the profits is kept by your HH? %
		NZD	NZD	NZD		
40601	40610	40611	40612	40613	40614	40615
01	03	\$ 18,600.00	\$ 8,000.00	\$ 10,600.00	1	100
02	00	\$ 4,500.00	\$ 2,500.00	\$ 2,000.00	1	100
03	04	\$ 17,000.00	\$ 700.00	\$ 16,300.00	1	100
04		\$, .00	\$, .00	\$, .00		

Breakdown of expenses

Business code no.	Did this business report expenses in 40612 above? 1. Yes 2. No If 2, go to S.4.7	Major Expense 1		Major Expense 2		Major Expense 3		Major Expense 4		All other	
		Expense code	Estimate of total expenditure	Expense code	Estimate of total expenditure	Expense code	Estimate of total expenditure	Expense code	Estimate of total expenditure	Expense code	Estimate of total expenditure
		Expense code		03. Electricity 04. Water 05. Communications 06. Fuel		07. Raw materials 08. Repair and maintenance 09. Building - rental 10. Equipment - rental		11. Registration / licences 12. Equipment 13. All other			
40601	40616	40617	40618	40619	40620	40621	40622	40623	40624	40625	40626
01	1	01	70	03	15	05	5	12	10		
02	1	02	95	03	5						
03	1	05	10	06	20	11	10	12	60		
04											
05											

6.8 Property income, transfer income and other casual receipts

This section of the income module covers income collected from three key sources:

- Property income
- Transfer income
- Other casual receipts

A brief description of what these three sources cover is as follows:

Property income

This income source refers to any income which is generated by the fact household members own property or assets. A common example is rent a household may collect for owning another dwelling they aren't using. Also included are any interests or dividends collected from investments or bank accounts.

Transfer income

This income source refers to any receipts which the recipient does not give anything to the donor in direct return for the receipts. Good examples are social security benefits received, pensions from former employers, child support/alimony received from other households.

Other casual receipts

While strictly not considered part of household income due to their irregular nature, this section has been included to give a better indication of all incoming financial assistance for a household. Things like the sales of assets and inheritances are covered in this section.

Due to the different nature in which these receipts are received by the household, two different collection options have been provided in this section which covers:

Option 1) Collect the amount of the last receipt and the number of times payment was received.

Option 2) Collect the amount received over the last 12 months in total from this receipt item

The option adopted for each of the receipt types in this section are summarized as follows:

Option 1 – last payment and number of times payment received

Property income:	Home rental
	Land lease
	Interest from finance institutions
	Interest from money lending
	Dividends
	Others (eg royalties)

Transfer income:	Social security benefits
	Pension, superannuation
	Child Support/Alimony
	Grant scholarship

Option 2 – Total in last 12 months

Transfer income:	Other transfer income
------------------	-----------------------

Other casual receipts:	Sale of Motor Vehicle
	Sale of Other Assets
	Inheritance
	Other casual income

6.8.1 Specific questions asked

40701: Income code

This information provides codes for the different types of income specified under the three groups discussed above.

40702: Property / Transfer / other casual income

This information is also provided and simply gives the name of the income receipt data is being collected for.

40703: Did any [HM] receive during the last 12 months? (do not leave it blank)

This question must be answered for all items in the 3 groups – do not leave blank. Simply record a value of “1” if a household member received that receipt, and a value of “2” if they did not.

40704 – 40705: Last amount received and amount of time payment received?

These two questions only apply to the items listed under Option 1 above. While the household may have received these receipts more than once in the last 12 months, only record the last amount received, and the amount of time payment is received in the last 12 months. In the case of money lending, record the estimated profit over the last month.

Example for property and transfer income and other casual receipts

In the example let's assume the household members received the following:

- 1) Home rental of \$400 a month
- 2) Interest from money lending of \$50 a month
- 3) retirement/pension of \$200 a fortnight
- 4) Child support/Alimony of \$500 every 3 months

Reference period last 12 months							
Income code no.	Property/Transfer/ Other casual income	Did any [HM] receive during the last 12 months? 1. Yes 2. No <i>Do not leave it blank</i>	If yes, ask 40704 to 40707				NOTE ID
			Amount of the last payment received in the last 12 months NZD	Amount of times payment received in the last 12 months	Total amount received during the past 12 months NZD	Where was this money received? 1. In Tokelau 2. in Samoa 3. Outside Tokelau or Samoa	
40701	40702	40703	40704	40705	40706	40707	40799
Property income							
11	Home rental	1	\$ 0 , 400 .00	12	\$ 4 , 800 .00		
12	Land lease/rental	2	\$ 0 , 000 .00		\$ 0 , 000 .00		
13	Interest (finance institutions)	2	\$ 0 , 000 .00		\$ 0 , 000 .00		
14	Interest (money lending)	1	\$ 0 , 50 .00	12	\$ 0 , 600 .00		
15	Dividends	2	\$ 0 , 000 .00		\$ 0 , 000 .00		
16	Other (eg, royalties)	2	\$ 0 , 000 .00		\$ 0 , 000 .00		
Transfer income							
21	Social security benefits	2	\$ 0 , 000 .00		\$ 0 , 000 .00		
22	Superannuation / Pension	1	\$ 0 , 200 .00	24	\$ 4 , 800 .00		
23	Child support/ Alimony	1	\$ 0 , 500 .00	1	\$ 2 , 000 .00		
24	Grant/Scholarship	2	\$ 0 , 000 .00		\$ 0 , 000 .00		
25	Other transfer income	2	n/a	n/a	\$ 0 , 000 .00		
Other casual receipts							
31	Sale of motor vehicle	2	n/a	n/a	\$ 0 , 000 .00		
32	Sale of other assets	2	n/a	n/a	\$ 0 , 000 .00		
33	Inheritance	2	n/a	n/a	\$ 0 , 000 .00		
34	Other casual income	2	n/a	n/a	\$ 0 , 000 .00		

40706: Total amount received during the past 12 months

The final question is only asked of persons reported income receipts for items under option 2 above. If last amount cannot be provided, an estimate of the total amount received over a year would be fine. For this scenario, record the total amount received over the last 12 months. It will be very difficult to provide an accurate answer for some of these items so a best guess will be encouraged from respondents. If more than one payment was received by household members for the same item in the last 12 months, make sure their values are added together.

Example for property and transfer income and other casual receipts

In the example let's assume the household members received the following:

- 1) Land lease of \$2,000 a year
- 2) Dividends \$250 a year
- 3) Sale of motor vehicle \$6,500

Reference period last 12 months							
Income code no.	Property/Transfer/ Other casual income	Did any [HM] receive during the last 12 months? 1. Yes 2. No <i>Do not leave it blank</i>	If yes, ask 40704 to 40707				NOTE ID
			Amount of the last payment received in the last 12 months	Amount of times payment received in the last 12 months	Total amount received during the past 12 months	Where was this money received? 1. In Tokelau 2. in Samoa 3. Outside Tokelau or Samoa	
			NZD		NZD		
40701	40702	40703	40704	40705	40706	40707	40799
Property income							
11	Home rental	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
12	Land lease/rental	1	\$ 0 , 0 0 0 .00		\$ 2 , 0 0 0 .00	1	
13	Interest (finance institutions)	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
14	Interest (money lending)	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
15	Dividends	1	\$ 0 , 0 0 0 .00		\$ 0 , 2 5 0 .00	1	
16	Other (eg, royalties)	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
Transfer income							
21	Social security benefits	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
22	Superannuation / Pension	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
23	Child support/ Alimony	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
24	Grant/Scholarship	2	\$ 0 , 0 0 0 .00		\$ 0 , 0 0 0 .00		
25	Other transfer income	2	n/a	n/a	\$ 0 , 0 0 0 .00		
Other casual receipts							
31	Sale of motor vehicle	1	n/a	n/a	\$ 6 , 5 0 0 .00	1	
32	Sale of other assets	2	n/a	n/a	\$ 0 , 0 0 0 .00		
33	Inheritance	2	n/a	n/a	\$ 0 , 0 0 0 .00		
34	Other casual income	2	n/a	n/a	\$ 0 , 0 0 0 .00		

6.9 Remittances and other cash gifts

This last section of the income module covers income from remittances received by household members over the last 12 months.

6.9.1 Definition of a remittance

A remittance by definition is often referred to as the transfer of money by a foreign worker to his or her home country. It makes up a large part of the economy for many developing countries. In the context of this survey, we will be defining a remittance as any money received by the household from another household, regardless of whether that receipt was received from inside or outside Tokelau.

Do not include alimony as part of remittances as this information has already been collected in the previous question.

Before being asked detailed questions, households are asked if they received any remittance money from members of another household. If they answered “yes”, then they will move on to the next section (40802). Otherwise, the interview will come to an end and no more questions will be asked on this module (Module 4).

6.9.2 Specific questions asked

40802: Sender

The person’s name which refers to who is sending the money is not that important, but is collected to ensure all remittance receipts are collected in this question. Feel free to use a nickname or just a relationship title (eg, cousin) to describe the sender in this question.

40803: Relationship to the head of the household

This question collects information on how the sender was related to the household head. A series of codes is provided at the bottom of the table which should be used to provide the answer to this question

40804: Place they reside?

This question is useful for two key reasons, i) it enables us to determine if the remittance is coming in from overseas or in Tokelau, and ii), if overseas, it shows us which country is providing the most remittances to Tokelau. Use the codes at the bottom of the table to provide an answer as to where the sender is sending the money from.

40805: Remittance code

This question aims to provide information on how the remittance was sent to the recipient. Four main options have been identified on how the money can be transferred from sender to recipient which cover:

- 1) Money transfer in bank account
- 2) Money transfer in western union/Money Gram
- 3) Cash received via friends/relatives
- 4) Cash by mail

A category 5, “Other”, is also included in case an alternative method is used.

40806: How often in a year do you usually receive this amount?

This question determines how many times money is sent to a household on a regular basis in the past 12 months. NOTE: Do not fill in anything if “2” was selected for the previous question, or, remittance money is not sent in regularly.

40807: Purpose of remittance

This question provides a means of determining the purpose of the remittance money sent to the household. Use the codes at the bottom of the table to provide an answer as to why the money was remitted to the household.

40808: How much did you receive from the sender in total the last 12 months?

This question reports the total amount received from that sender over the last 12 months. If the sender sent money on more than one occasion in the last 12 months then add these values together to get the total amount for the 12 month period.

Example for completion of the remittances and cash gifts section

In the following example, the household received remittances from two sources:

Source 1: From household head's father (Michael) who is living in Samoa who sent roughly \$250 twice a year.

Source 2: From household head's uncle (Pierre) who is living in NZ who sent \$1,000 as a one-off payment.

1. Yes <input checked="" type="checkbox"/> Provide details below 2. No <input type="checkbox"/> End of Module 4							Reference period last 12 months	
Line no.	Sender Information			Remittance Information			How much did you receive from this sender in total the last 12 months? NZD	NOTE ID
	First name or Surname of the sender.	Relationship to household head? 1. Spouse 2. Son/Daughter (incl. adopted) 3. Son-/Daughter-in-law 4. Parent or spouse's parent 5. Uncle/Aunt 6. Grand-son/-daughter 7. Brother/Sister 8. Other relative 9. Non-relative	Place of residence? 1. Tokelau 2. Tuvalu 3. Samoa 4. New Zealand 5. Australia 6. Other Pacific Island Country 7. Other (note)	What is the type of remittance? 1. Money transfer in a bank account 2. Money transfer WU/Money Gram 3. Cash received via relatives, friends 4. Cash by mail 5. Other (note)	How often in a year do you usually receive this amount?	Purpose of remittance 1. Church gift 2. Traditional ceremony 3. Funeral 4. Wedding / Birthday 5. Living support 6. Other (note)		
40801	40802	40803	40804	40805	40806	40807	40808	40899
01	Michael	4	3	1	02	5	\$ 000,500.00	
02	Pierre	5	4	1	01	5	\$ 1,000.00	
03							\$, .00	
04							\$, .00	
Total amount							\$ 1,500.00	

PART 7: SPECIFIC GUIDELINES FOR COMPLETEING THE HOUSEHOLD DIARY

7.1 Introduction

This is the final part of this manual and most of the instructions are already in the first two pages of the diary, but this manual will elaborate a little more on the instruction.

Note:

The diary is to be filled by the household and interviewers are required to visit all selected households at least every other day to check up on the forms.

The key aspect of the job of the interviewer is to ensure that the households are not only updating their diary everyday but completing them in a readable way. All information recorded in the diary needs to be entered in the computer so it is important that it can be read clearly.

Note:

Also the diary should be recording the expenditure for every household member during the two week period, so when visiting the household make sure the expenditure of every household member has been recorded. The households are allowed to complete the diary in either English or Palauan.

There are five (5) sections to this diary which the households have to fill out for a period of two (2) week. The five (5) sections will cover:

- 5.1) Daily expenditure of food and non-food items
- 5.2) Payments of service made
- 5.3) Gambling winning and losses
- 5.4) Items received for free
- 5.5) Home produced food and non-food items

Each day displays the 5 section on the same double page.

7.2 Preliminary instructions about the diary

The diary is made off 2 similar booklets, 1 for each week:

- Dairy 1 covers week 1 day 1 to 7
- Dairy 2 covers week 2 day 1 to 7

Before dropping the diary to the household make sure:

1. You complete the day id (1 to 7 in both diaries)
2. You tick the day of the week for all days
3. You filled in the appropriate dates for day 1 to day 7

In the following example, round 1 starts on Tuesday the 12th of May (day 1 of diary week 1) and will finish on Monday the 25th of May (day 7 of diary week 2).

DAY 01	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 12 05 15	WEEK 1
DAY 02	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 13 05 15	
DAY 03	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 14 05 15	
DAY 07	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 18 05 15	
DAY 01	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 19 05 15	WEEK 2
DAY 02	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 20 05 15	
DAY 03	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 21 05 15	
DAY 07	Mon	Tue	Wed	Thu	Fri	Sat	Sun	(dd/mm/yy) Date 25 05 15	

This information has to be pre filled in by the interviewer before the diary is dropped off to the household.

7.3 Daily expenditure of food and non-food items

The first section of this diary is divided into two subsections: 1. Expenditure on food items and 2. Expenditure on non-food items. Seven pieces of information are collected in this section, covering the following:

Note

Any items bought by one of the household member this day have to be recorded in this section: Food, alcohol, clothing, furniture, household equipment, fuel, vehicles, devices, entertainment items, stationeries, personal items...

5101: Food and non-food items

Include a brief description of each food or non-food item purchased on the day by any household members, even if it was not for their own consumption. Include all food items, drinks, takeout food, toiletries, furniture, etc.

5102: Type

Provide the detail of the item purchased. Some examples were given in the diary that can be used as a guide for filling this section. NB: For some non-food items such as toilet paper, soap, etc. this question is not applicable. Examples of responses for this question for the food items include:

- Fresh
- Canned
- Preserved
- Frozen
- Cooked
- Salted

- powder
- long life
- dried
- spices
- bottle...

Feel free to use a different description if it explains better the type of food item purchased.

5103 & 5104: Quantity, and unit

These two questions aim to measure the quantity of the food and non-food items purchased in this particular transaction. This information will be used to check to make sure the price entered appears valid. The “quantity” component of this section refers to the total number of that item purchased, whereas, the “unit” component is the description of the quantity of the item. Refer to the example on the first page of the diary to guide the households on how to fill out this section. Some more examples are shown below:

Metric quantities are expected here (Kg, grams, litre, milliliters...) but in the case of apple, coconut... the number of pieces/fruits is enough in quantity.

Different ways to record: I bought 1 kg of rice

	Description	Type	Quantity	Unit
Option1	Rice	dry	1	kg
Option2	Rice	dry	1000	grams
Option3	Rice	Dry	500	grams
	Rice	Dry	500	grams

Different way to record: 8 apples I bought (= 1kg of apple)

	Description	Type	Quantity	Unit
Option1	apple	fresh	1	kg
Option2	apple	Fresh	8	Pieces / fruits

5105: Total amount

This section records the amount paid to purchase the item(s). In some cases where the household member purchase the item but will pay on a later date the household member still needs to record it as well.

Rule

The total amount of the item bought has to be recorded here, even if the items was not paid yet or only partially paid.

Transactions have to be recorded in the diary the day when the household take benefit of it.

5106: Locally produced

This section records any of the items purchased that are locally produced. Examples would be fresh tuna, take out foods, a loaf of bread, local product, and handicrafts. If the item is locally produced then place an “X” in the box provided.

5107: Purpose

The last question of this section requests information on how the purchased items are used. There are four options:

- 1.) Personal: Private use (for the household own use or consumption)
- 2.) Gift to another household (give it away as a gift to somebody else from another household)

- 3.) Business (for selling)
- 4.) Other(animal feed)

7.3 Payments for service or donation

The second part of the diary records of all services or donation paid for the entire household.

Services are payments made with a service expected in return:

- Tire Repair
- Taxi Fare
- Telephone bill
- Water/Electric bill
- House rent

Donations are payments made with nothing expected in return:

- Money given away to Church
- Money sent to support family (remittance)
- Even taxes or fines paid to the Government have to be recorded in this section

5201: List of payment

This item provides a description of the services or donation.

The main difference between this section and the previous section (S5.1), is that in the previous section a physical object was purchased (either food or non-food). In this section the purchase is not in the form of a physical object, but for a service provided to either this household or another household.

5202: Total amount

This question asks the household to record the total amount paid for that particular service or the total amount given away (one way transfer)

5203: Purpose

This section records the purpose of the household member paying for each service, if it's for personal use, a gift to another household, or for business purposes.

7.4 Gambling winning and losses

This section requires the household member to record all activities relating to gambling. There are four main types of gambling identified in this section, covering

- 1.) Bingo
- 2.) Cards
- 3.) Machine
- 4.) Others

The category "Other" covers all other forms of gambling that are not in the list such as cock fighting and betting on a pool game.

Keep in mind that for gambling people don't always win, so make sure the losses are recorded also.

5301: Type of gambling

This section requires the household members to write out the type of gambling.

5302: How much did you spend on gambling?

This question requires the total amount spend on this particular type of gambling this day (total bet).

Bingo: the price of the bingo cards purchased

Cards & machine: overall amount spent in the machine or bet at the cards

5303: *How much did you win on gambling?*

This sections aims to capture how much is won of each gambling period.

Only cash win can be recorded in this section, in kind win does not count.

5304: *Overall winnings/looses*

This question is the result of the balance between winning and losses. (5303 – 5302). Can be negative if the amount spent (5302) is higher than amount win (5303).

7.5 Items received for free

The fourth section of the diary records any food or non-food items that the household member received for free. The item could be received from any source including a neighbor, employer or church organization.

5401: *List of food and non-food item*

This question records the description of the food or non-food item that the household received as free or a gift from another household.

5402: *Type*

Provide details of the food or non-food item that was received. As with S5.1, this question is mainly related to food items which the household received for free. Some examples are already provided in the diary.

These examples include:

- Canned
- Fresh
- Frozen
- Cooked

5403, 5404: *Quantity, and unit*

These two questions aim to measure the quantity of the food and non-food items that were received as gifts. The “Quantity” component of this section refers to the total number of that item received, whereas, the “unit” component is the description of the quantity of the item.

5405: *Estimated Amount*

This question records the amount if the household member were to sell that particular item received for free or as a gift. The price you would receive if you sell it is the price to record in this section. As the item is received for free, a best guess as to its value is all that is required for this question.

7.6 Home produced Items

This last section is there to capture all home produced food and non-food including food for animal feed and handicrafts. This section is divided into four (4) subsection and they are as follow:

- Section 1: What you consumed
- Section 2: What you sold
- Section 3: What you gave away

This section does not aim to collect information on what was actually caught (eg, fish) or harvested (eg, crops) on that day. The section aims to collect information on what was used, falling under the 3 sub-sections above.

5501: *Home Produced Item*

This question has four parts to it.

Section 1: Which home produce did you consume today? This question the household member lists any home produced items that were consume that particular day.

Only food items the household home produced, harvested and cooked this day have to be recorded here.

Rule

By asking the menu of the day interviewers allows interviewers to identify the home produced food items that were consumed this day:

1. Any fruits picked earlier or this day and eat this day have to be recorded
2. All fish caught earlier of this day and eat this day have to be recorded
3. All coconut used to process coconut milk cooked this day have to be recorded
4. All pig meat eaten this day

In regards to recent productive activities that your household does - Did your household:		Total quantity	Unit	Estimated value if you were to sell it
1) Harvest anything from your own garden, farm or property such as cucumbers, coconuts, cabbage, todody, firewood, etc.? 2) Go fishing and catch or harvest fish, seaweed, clams, etc.? 3) Give away for a ceremony or to another household's? If you answered yes to any of these questions, please DESCRIBE the items in the sections below. If more than 3 items in one of these sections, add in a SS.5a overflow sheet.			Pounds, grammes, bundle, basket ...	NZD
5500	5501	5503	5504	5505
Section 1. Which home-produced items did you consume/eat today? <input type="checkbox"/> Tick if none consumed today				
List the items CONSUMED TODAY, that your household produced, caught or harvested. If it was a community activity please list only the portion that your household consumed. DO NOT write meals like fish and cabbage soup, instead list fish and cabbage separately. If you only prepared half of the item like a fish, please estimate only the portion that was prepared. Don't forget items like todody or firewood.				
01	Fish caught - Skip Jack tuna	2	kg	\$ 15.00
02	Coconut from the garden	3	pieces	\$ 3.00
03	Taro	5	fruits	\$ 10.00
04	leg of pig	5	kg	\$ 50.00
05				\$

Section 2: Which home produce items did you sell today? This question lists any home produces that any house member sells today ranging from fruits picked in the garden, vegetables grow by any household member, fish catch, livestock (alive or dead) and handicrafts sold as well.

In this example, the household sold:

1. 5 kg of reef fish they caught (\$10 per kg)
2. 1 bunch of banana picked in the yard (sold \$15)

Section 2. Which home-produced or self-caught items did you sell today?		<input type="checkbox"/> Tick if none sold today		
List the items SOLD TODAY, that your household produced, caught or harvested. If it was a community activity please list only the portion that your household sold. If you cooked parrot fish and sweet potato and sold it as meal at the market, please list the fish and potato separately. Use you best guess at the weight or number of pieces prepared or sold. Don't forget to include sold live animals.				
01	Fish - reef fish	5	Kg	\$ 50.00
02	Banana - cooking	1	bunch	\$ 15.00
03				\$
04				\$
05				\$

Section 3: Which home produce items did you give away today? This question records anything home produced that the household member gave away as a gift to another household(s) member not from the same household.

The household head caught 2 tuna and gave 1 to another household

1. For this household:

Section 3. Which self-caught or home-produced items did you give away today?

☐ Tick if none given away today

List the items GIVEN AWAY TODAY, that your household produced, caught or harvested. If it was a community activity please list only the portion that your household gave away. Please do not list prepared meals, list only the home-produced items that were used in the meal. Use your best guess at the weight or number of pieces that were given away. Remember, DO NOT include items that you bought.

01	1 fish - bonito	8	kg	\$	50	¢
02				\$		¢
03				\$		¢
04				\$		¢
05				\$		¢

2. For the household who received the tuna: Section S5.4 (items received for free)

S5.4		Food, non-food and services received for free			<input type="checkbox"/> Tick if none received	
List of items (food, non-food and services)		Type	Total quantity	Unit	Estimated value if you were to buy it (combined value)	
List all the good and services that you received for free as a gift from other HH, groups, or communities (eg, breadfruit, boat repair, beer, cooked pig, fish, soup, etc.) If more than 8 items, then add in a S5.4a overflow sheet		Eg, fresh, cans, tin, frozen, cooked		Pounds, grammes, bundle, basket ...	NZD	
5400	5401	5402	5403	5404	5405	
01	1 fish bonito	fresh	8	kg	\$	50 00 ¢

5503, 5504: Quantity and unit

These two questions aim to measure the quantity of the home produce goods, which was consumed, sold or given away. “QTY” component is the number describing the unit amount of each item produced. The “unit” component is the description of the quantity of the item.

Metric units would be preferred, but if it is not possible, try to find some common units (pieces for fruits, vegetables, bundle, bunch, heap...)

Here are some examples of quantities.

Item	Qty	Unit
Apple	1	fruit
Coconut Crab	5	pieces
Breadfruit	2	kg
Reef fish	3	kg

5505: Estimated amount

This question records the amount if the household member were to sell that particular home produced item. The price you would receive if you were to sell this item is recorded in this section.

7.7 Dealing with blank sections

An issue which will arise often is that a household will not have any information to record for a section on a particular day, because they did not purchase any items (S5.1) or purchase any services (S5.2) or gamble (S5.3) or receive any items for free (S5.4) or use any home produce (S5.5). When this occurs, ask the household to tick the box on the top right hand corner to indicate no such activities had occurred and confirm the section wasn't accidentally overlooked. An example of the tick box for Section S4.1 is as follows:

