

Appendix 2: The 'poor person's tax burden' survey

Identification

- ▶ Survey number: _____
- ▶ Code for name: _____

Background

- ▶ Birth date/month/year: _____
- ▶ Place of birth: _____
- ▶ Sex: _____
- ▶ Marital status: _____
- ▶ Years of schooling (literate/illiterate) _____
- ▶ How many members of the household _____
- ▶ How many of these members are:
 - 0–5 years _____
 - 6–10 years _____
 - 11–15 years _____
 - 16+ years _____

Income level

- ▶ What types of income does the household have: _____
- ▶ Regular income from:
 - How many members of the household have a permanent job? _____
 - How many members of the household have irregular jobs (seasonal, etc)? _____
 - Does the household have an income from selling of produce (agriculture, used clothes, other products?) _____
 - Does the household receive remittances on a regular basis (eg from family members abroad or in other parts of the country)? _____
- ▶ What was the household's income in the past month? _____
- ▶ What was the household's income in the past six months? _____
- ▶ What was the household's income last year? _____

To facilitate gathering information on the previous questions, income intervals can be created based on local conditions. Households who produce seasonal crops or have seasonal jobs will have income levels that vary across the year, as will beneficiaries from remittances unless these are transferred on a regular basis.

Household consumption requirements

- Products used in the household from own production or collected (self-sufficiency)

Food:

- Product: _____
- Product: _____
- Product: _____
- Product: _____
- Product: _____

Fuel (for cooking, lighting, etc):

1. Product: _____
2. Product: _____

- Products **purchased** for household consumption **during the last week**

Food:

- | | | | | | | | |
|--------------|-------|-----------|-------|--------|-------|-----------|-------|
| 1. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 2. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 3. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 4. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 5. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 6. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 7. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 8. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 9. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |
| 10. Product: | _____ | Quantity: | _____ | Price: | _____ | Location: | _____ |

Fuel (for cooking, lighting, etc):

1. Product: _____
2. Product: _____

- Any products purchased during the last week that are out of the ordinary?

Transportation:

- How many members of the household travel on a regular basis? _____
- What is the means of transportation? (if the answer includes motorised means of transportation go to next bullet point) _____
- Private (car, motorcycle, moped) _____
 - Public (bus, taxi, train) _____
 - What is the distance travelled for the past month? _____
 - How much did you spend last week on: _____
 - Fuel (private transportation)? _____
 - Tickets (public transportation)? _____

Communication:

▶ What is the means of communication? (if the answer includes electronic communication, go to next bullet point)

- Mobile phone _____
- Internet café _____
- Telecentre/payphone _____
- Other _____

▶ How much did you spend last week on:

- Mobile phones _____
- Internet cafés _____
- Telecentre/payphone _____
- Other _____

Major expenditures:

▶ What are the major expenditures that have been made in the household in the past year?

- Health related (hospitalisation, medicine): _____
- Education related (school fees, materials): _____
- Transportation related (bicycle, motorcycle, car): _____
- Investments in housing (improvements, investments): _____
- Garments (new clothes) : _____
- Production (land tenure, animal stock, tools): _____