

# **Living in Newham Wave 1**

## **CONTENTS**

Useful Phone Numbers .....	2
Introduction.....	3
The Sample .....	5
Defining the Household .....	10
The Paper Documents .....	15
<u>The Questionnaire Components:</u>	
Coversheet .....	16
Household Grid.....	19
Interview Outcomes .....	22
Household Questionnaire.....	24
Individual Questionnaire.....	28

## **USEFUL PHONE NUMBERS**

If you have any queries Your first link is with Shelia Mayne (the Supervisor). She is there to help you if any problems arise.

Shelia Mayne.....01279 505141

### **THE ESSEX INSTITUTE**

For general enquiries concerning addresses, vouchers, etc call:

Sandra Jones on Freephone **0800 252853** (24 hour)

If there are any questions about other aspects of fieldwork or administration please contact:

Mike Merrett.....01206 874666

or questionnaire related queries call:

Heather Laurie.....01206 873556

Jon Burton.....01206 873986

## **Introduction to the Living in Newham Survey**

The **Living in Newham** survey is a new social survey aiming to interview around 2000 people in 1000 households across the whole of Newham. The survey is similar to an existing survey called the **Living in Britain** survey. Living in Britain is a survey of the social and economic conditions of a nationally representative sample of around 5,500 households in Great Britain, and of how these change over time. It is one of the most important and innovative academic social science research projects of the 1990s which has been conducting annual interviews since 1991.

The Living in Newham survey will be run by the Institute for Social and Economic Research at the University of Essex, and is funded by The London Borough of Newham. While the Institute is responsible for running the survey, there is a consortium of academics and policy makers from Newham council who are advising and guiding the researchers at the Institute about the conduct of the Living in Newham survey. These academic and policy researchers will also be responsible for carrying out research using the data you collect and for providing advice to The London Borough of Newham on the basis of their findings. So this is very much a joint venture between local/Newham researchers and the Institute which will be of great importance in informing the social policy debates within Newham over the coming years.

You will be asking for information on people's health, housing, family circumstances, education, employment, living standards, and opinions. Put more simply, the survey will investigate some of the most important aspects of people's everyday lives. The **Living In Newham** survey will be large enough to represent the entire population of Newham, and enable issues to be researched and compared with the circumstances and experiences of people living in the rest of the country.

This first year of the survey is particularly important as we need to gain as high a response rate as possible. We will be relying on your skills to help us achieve a high response rate which will give the best quality and most accurate data for researchers.

The survey is very much like other large social surveys, but it does have particular features that you should be aware of.

1. We will be interviewing every adult household member at sampled addresses: that means with everyone who is aged 16 or over on or before June 1<sup>st</sup> 2002. There is no upper age limit on the survey. Where it is not possible to interview every person within a household you will need to try and get proxy information on those respondents who have not been interviewed.
2. This is a panel survey, which means we will be aiming to interview the same respondents once a year over several years. For the panel to be viable we must keep refusals **to an absolute minimum**. We also have to create a long-term relationship with respondents so that we can minimise the number who drop out later.

These features mean that the new surveys must get off to a good start. The basic rules for success are simple:

- 1) You must keep calling back on non-contacts in order to maximise the sample.
- 2) You must keep refusals to an absolute minimum.
- 3) The interviews are straightforward and should be treated as such.
- 4) You emphasise the voluntary nature of the interviews and try to build up a rapport.
- 5) After the interview you say we would like to return next year if possible.

The rest of the first part of these instructions tell you how to achieve maximum results and to produce accurate and high quality data. It starts with describing the sample, gives guidance on making contact, describes the various schedules you will need and ends with return of work. The remainder consists of detailed guidance on the questionnaires.

Please do not hesitate to ring any of the numbers listed on page 2 if you have any doubts or queries during fieldwork.

The questionnaires you will be using have been through several pre-tests in the field and a pilot survey was conducted a few months ago, with interviewers finding few problems.

## **THE SAMPLE**

You will be interviewing people in private households. Your sample will be 30-35 addresses and you should aim to achieve a full response rate – that is interviews with every adult member – in all eligible addresses. You will not know the names of the occupants until you make contact. The sample for this survey is drawn from a list of all addresses in Newham. The sample is spread over Newham in such a way that all different kinds of areas and households are represented.

You might be used to approaching named individuals, but research shows that this is not important as long as respondents have some advance warning of the interview – and you will have advance letters to send to each address before you start interviewing. The advance letters come to you ready to post and include the letter and a pamphlet giving details about the survey.

### **Eligible Addresses**

Business premises have been removed from the file before the sample was drawn, but there may still be some non-residential property. Clearly if no-one lives at an address you can't do an interview there. But that doesn't mean you can just look at the address, see that it is a school for instance, and decide there can be no interview. Even if an address appears to be non-residential, there might be a caretaker living there. You will therefore need to check any apparently non-residential address to see if a private household is resident there (e.g. in flats over shops).

### **Institutions**

As well as addresses that no-one lives at for instance, because they are derelict, or business premises, some residential addresses may be ineligible if they are institutions. An institution is defined as :

**‘an address at which four or more unrelated people sleep; while they may or may not eat communally, the establishment must be run or managed by a person or persons employed for this purpose by the owner.’**

Larger institutions (e.g. hospitals, hotels, retirement homes) should have been excluded from the sample. Commonly encountered smaller institutions are boarding houses, hostels and small nursing homes.

You must always check, however, to see if there is a private household normally resident at an institutional address (e.g. caretaker, warden etc.) and if there is you should interview them. In case of any doubt you should contact the Institute.

### **What address to interview at**

The address to be interviewed at is the address **exactly** as it is given on the sample sheet. So if the address given is 17A High Street, then you should interview at 17A and ignore 17B or 17C and so on. However, if the address given on the sample sheet is 29 Albert Road, and when you get there you find it has been divided into two or

three parts then you must interview in each of these. More rules for multi-household addresses follow. Query any significant address discrepancies with the Institute before you interview.

### **Multi-household Addresses**

In a few cases the address given on the sample sheet will prove to be a multi-household address, that is one that contains accommodation for more than one household. This may be the case if an old house has very recently been converted into flats, or in the case of a large house divided into bedsits. If the address contains two or three households you should interview at all of them. If the address contains more than three separate units of accommodation you must select three of them for interview, using the Multi-Household Selection Sheet. Further details on how to do this are in the instructions for completing the Coversheet.

### **Hard to find addresses**

You should have a map of your area. In cities and towns guides (such as 'A-Z') are usually good enough. If you have any problems finding addresses on your sample sheets there are several people who can help.

1. Check with local residents – try the neighbours.
2. Go to the local post office which should have a fairly recent directory of post codes or telephone the local sorting office to talk to the local postman or woman who actually delivers to that address (you will need to do this before 11am).
3. Contact the local police station.
4. Check local libraries / Tourist Information for local maps, and to check on Electoral Registers to obtain the surname of the residents.

**If you are having any problems finding addresses and cannot get help locally it is crucial that you contact the Institute as soon as possible.**

### **Advance Letters**

You will have pre-addressed advance letters which you have to post out before calling. These explain that you will be contacting the address in the next few days and asking all those living at the address to take part in the survey. The advance letter also includes a pamphlet explaining the purpose of the survey, what you will be asking respondents to do, and how the data will be used. Some spares of the letter and pamphlet will be included in your work pack in case respondents do not receive the mailed out copy.

The memory of the letter must be relatively fresh in respondents minds for it to have the optimum effect so please call on them as soon as you can. You should be thoroughly familiar with the contents of letters and leaflets, as respondents may query points mentioned in them.

The letter and leaflet give a freephone number for respondents wishing to contact the Institute. Every effort is made by staff to pass on messages from respondents to interviewers immediately.

### **Gift Vouchers**

For each person who does an Individual Interview, you will have a £5 gift voucher to hand to them at the point of interview. If you require more vouchers, please contact the Sandra at the Institute. No voucher is given for a proxy interview. The voucher is not intended as a payment for people's time but is simply a token of our thanks for taking part.

### **On your first contact at a sampled address you must first of all:**

- 1) Check the address.
- 2) As usual, tell the respondent your own name, that you work for University of Essex and show your identity card.
- 3) Tell the respondent that you are carrying out the **Living in Newham** survey
- 4) Refer to that advance letter and leaflet and check whether or not they have been received.
- 5) Ask the respondent if they would prefer to be interviewed by a different interviewer or in a language other than English.
- 6) Give a brief introduction to the survey, mention that we wish to interview all people 16 and over and request an interview.

If a respondent would prefer to be interviewed by another interviewer or in a language other than English then you should contact Sheila, the supervisor.

If respondents did not receive, or do not recall receiving, the letter and leaflet you should give them one of the spare copies. You should always have these immediately to hand when you first make a call. In such cases you would normally give your short introduction to the survey before giving them the letter and leaflet but you should then allow sufficient time for the respondent to read the letter or leaflet, if they wish to, before continuing.

Initially you should give a fairly brief explanation of the survey, expanding and developing it according to the needs of different respondents. You should draw on the notes in these instructions, the material in the advance letter and leaflet, information about the survey given to you at the briefing and your knowledge of the questionnaires themselves to develop an introduction.

Under no circumstances must you ask all household members to be present at the same time for interview. **You MUST be prepared to be flexible and make more than one visit to the household if necessary.**

**The best initial introduction is the one you feel most comfortable with.**

However you might wish to try something along the following lines:

“We are carrying out a survey called **Living in Newham** which is about how people are getting by in **Newham** today, the things that matter to them and their views on important issues. The survey is being carried out throughout Newham and will provide an up to date picture about such things as people’s health, their housing, education, employment and their opinions”.

Many people will agree at this point to be interviewed, others may simply require information about the length of interview or the sort of questions to be asked, but some will require more information about the purpose of the survey or reassurance about matters such as confidentiality or how they came to be selected. Confidentiality and address selection are dealt with in both the advance letter and the leaflet and before making any calls you must be familiar with the relevant points in them. When you are explaining the purpose of the survey more fully two factors are important above all:

- 1) You must be clear and certain in your own mind about the reasons why the survey is being carried out and the uses to which its results will be put. You must know why the information we are collecting is important and the sort of problems the survey is designed to study.
- 2) You must be prepared to adapt your explanations, stressing different facets of the survey, to suit different types of people. Professional people, working mothers, the elderly and young people will not all respond equally well to exactly the same introduction. It is important that respondents see the survey not just as important but also as relevant and interesting to them. This survey has been carefully designed so that it has both a ‘common core’ of questions for all and a number of sets of special questions for various groups in the population. Although the ‘common core’ covers some of the most fundamental aspects of people’s life for some people the special questions will be the most interesting. For example, stress the importance of the health questions and how they feel about social services, housing or retirement. With the self-employed stress that you realise they have very little time to take part in surveys because of long working hours etc (especially with farmers) and they are therefore usually under-represented in such surveys, but it is important that we get a true picture of their position. With working mothers, stress that the interview can be arranged to suit any time that is best for them, and that we need to find out whether the help given to working mothers, either by employees or the government, is either sufficient or the right type of help.

### **Other Household Members**

Where people are reluctant to co-operate because they think other members of the household may be opposed (*‘my husband wouldn’t like me to answer any questions’*) you should reassure respondents with something like *‘That’s all right. The questions are quite straightforward, but I can call back and speak to your husband and explain the survey to him personally. When is the best time to catch him?’*



Remember that this is a survey where you will be trying to interview all members aged 16 and over and that you must be prepared to introduce the survey each time you talk to someone. Do not assume that details of the survey will be passed on from one household member to another.

### **Hints on how to counteract refusal**

All of you will have your own style for trying to persuade unwilling people to co-operate in surveys. Their main two points are:

1. Make these people feel that they are the most important person in the survey and tailor your response to their particular circumstances.
2. Be prepared to be flexible. If the respondent wants you to make an appointment or call at a different time, make it clear you are happy to fit in with their requirements.

### **Here are a number of effective approaches for counteracting refusals:-**

**I've done my share of surveys:** Keep on stressing that it only takes around 45 minutes. Without their help the survey is much less representative. Everybody is different and cannot be replaced.

**Interviews have to be done at same time:** The whole household does not have to be interviewed all at once. I can come back as many times as need be to do all the interviews.

**The questions might be too personal or intrusive:** Remind them of their rights to refuse individual questions. "The interview is completely voluntary and you can refuse any questions you find too personal, sensitive or intrusive. The questions you do answer will still be important to us, no matter how few".

**Too busy:** Stress that this group is one of the most important to the survey. Because of the large numbers of unemployed and retired, we need all the information that only full-time workers can supply to give us a really accurate view of working life in Newham. Always make it clear that you will fit in with their requirements.

**Worried about confidentiality:** State that "We are governed by the Data Protection Agency and the Data Protection Act of 1998. The Data Protection Agency is extremely strict and we follow their rules explicitly. Our guarantee is that no information you give can be linked to you. Only a handful of people have access to the computer which contains the information you give. The files are protected by secret codewords which are changed frequently. In addition we guarantee that no information will ever be released with your name or address on it". We have found that stressing the 'number crunching' aspect of statistics helps when people refuse because they are worried information on their own household might, for example, get into the hands of the council or Government departments. For this category of refuser it helps to say that the statistics present them as a percentage figure of the population

rather than singling out their particular family. **However, it is obviously crucial not to let the respondent think they can easily be substituted, or that we don't care, 'because they are just a number'.**

### **Some general points...**

People will always be more willing to co-operate if they think you have made a special journey to see them. Once reluctance has hardened into refusal they become much more difficult to convert. The most successful way of meeting reluctance and avoiding refusal is by addressing directly the concerns of the respondent. In doing this the basic principles are :

- 1) Give reassurance
- 2) Be positive
- 3) Appeal to their altruism

Always be relaxed and friendly, never pressurise.

Be flexible and sensitive.

Be positive about the benefits of taking part :

‘Every-one finds the interview interesting and enjoyable’

Stress the importance of the survey results being reliable and representative of everyone living in Newham. Everyone's circumstances and views matter.

Information from the survey will be used by in planning for health and social services and in many other ways. By helping us they will be helping in this and will be helping the many people who will benefit from any improvements in these services.

Often surveys miss out people like them and by helping us they will be making sure that people in similar circumstances and with similar views are taken notice of.

### **Whom To Interview**

Once you have made contact at an address you will need to enumerate a household before going on to interview all eligible members.

### **What is a household ?**

The aim of the definition is to ensure that all individuals are included at an appropriate address but that no-one can be counted at more than one address. Our definition of a household is :

**‘One person living alone or a group of people who either share living accommodation OR share one meal a day and who have the address as their only main residence’.**

The majority of households are straight forward and their composition will be established without difficulty. Nevertheless, there are two concepts embodied in this definition either of both of which you will have to sort out on occasion. These two concepts are given below together with more detailed information about what is meant by them.

### **Household membership**

**‘Sharing at least one meal a day’:** this should consist of a main meal but does not imply that the household must always sit down together for the meal as long as food is bought for joint use. Breakfast may be counted as a main meal.

**‘Sharing living accommodation’:** that is, a living room or a sitting room. Accommodation may still be counted as shared where the address does not have a living room which is separate from the kitchen, that is, where the main living room of the accommodation forms part of the same room as the kitchen. Similarly a household can be treated as one if the living room also has to be used as a bedroom.

A group of people should never be counted as one household solely on the basis of a shared kitchen and/or bathroom.

Occasionally an individual or a group of people will have both their own living accommodation (that is living room/bedsitter and kitchen) and the use of a communal living room. In such cases priority should be given to having their own accommodation, and they should be treated as separate households. Situations arise in, for example, warden assisted housing for the elderly, flatlet houses, or separate granny flats where the parent occasionally also uses the family living room.

In addition to these rules which must be applied there are two general points to note:

- 1       Members of a household need not be related by blood or marriage.
- 2       To be included in the household an individual must sleep at the address when s/he is in residence: anyone who sleeps at one address but has all their meals elsewhere must therefore be included at the address where they sleep.
3.       There are several groups of people who will only rarely stay at an address but who will nevertheless have it as their main residence. Such groups are merchant seamen, fisherman, oil rig workers and businessmen who are away from home.
4.       To be included in the household an individual must sleep at the address when he/she is in residence: any-one who sleeps at one address but has all their meals elsewhere must therefore be included at the address where they sleep.

## **Residence.**

It is necessary to decide whether residents at an address are using the accommodation as their **main** address. Where there is doubt because respondents have more than one residence their MAIN residence should be decided by the person him or herself.

However, the following special rules take priority over your respondent's assessment and should always be applied.

### **EXCLUSIONS:**

- 1a Adult children, that is, those aged 16 and over who live away from home for purposes of either work or study and come home only for holidays should not be included at their parental address. **This does not include those at boarding school who are listed as household members.** Therefore students who live away from home while attending professional or vocational education such as studying at University or College full-time (or other further or higher education such as nursing schools) are excluded from their parental household, even if they happen to be at their parents' address when you call.
- 1b Anyone who has been away from the address continuously for 6 months or more should be excluded even if your respondent continues to think of it as their main residence, with the exception of certain people working away from home.
- 1c A weekend or holiday home can never be a main residence and this should be coded as ineligible.
- 1d You should exclude people from abroad who have come to Britain specifically to take up a particular post for a fixed term; foreign servicemen and foreign diplomatic staff and overseas students who will leave the country following the end of their course.

### **INCLUSIONS:**

- 2a Anyone who has been living continuously at an address for 6 months or more should be included at that address even if this person has their main residence elsewhere. Please note, therefore, that this rule takes precedence over the two residences rule.
- 2b Any respondent at whose address, in this country, you are calling should be included even if the address is a temporary one, for example, while they are searching for permanent accommodation, you should not however include anyone who is making a holiday or business visit only and who remains resident abroad.
- 2c Boarders (that is, unrelated individuals paying for food and accommodation) should be included as members of the household, provided that no more than

three boarders are being catered for. If four or more boarders are catered for, the guests should be excluded (as they live in an institution).

- 2d Include people who only rarely stay at an address but nevertheless have it as their main residence: e.g., merchant seamen, fishermen, oil rig workers, and military personnel. Please note the difference from temporary addresses mentioned earlier. This rule applies only to spouses of a sample member. Thus, a child in the army away last year (and therefore not a sample member) returning briefly this year, would not now be included. But he or she would be included if a spouse of a sample member. These people can be proxied if away at the time.
- 2e Include children at boarding school (irrespective of age); children aged 16 or over **who normally live at home** while attending University or College but who are temporarily away (e.g. on holiday or a residential course); children aged 16 or over who have finished a college course and are now living at home as their sole residence even if they are planning to move to another place soon; and children working away in a **temporary** job.
- 2f Anyone staying with a friend while looking for a flat or house of their own, if they have no other residence. Anyone for whom this is the sole residence in the UK, even if this is a temporary residence while they are searching for permanent accommodation. This does not therefore include someone on holiday or a business visit, but would include asylum seekers or anyone looking to stay permanently in the U.K.

### **Examples.**

Under rule 1a you would exclude, amongst other groups, those working away from home on a permanent basis. Children working away from home in a temporary job would, however, be included in the parental household as are all children at boarding school.

Under rule 1b you would exclude individuals who have been in hospital or prison for 6 months or more and children who have been in care for an extended period.

Under rule 2a you would include a widowed mother who had been staying in her son's or daughter's home for more than 6 months even though she still had her own home and intended to return there.

### **Note on students:**

If a young person has just left a parental home to live away at College or University, they do not count as a household member unless they intend to return to live at the address as their main residence within six months. This is because they are living at a separate address at the time the sample was selected for the survey. If they have not yet left to go away for the first year of their studies at the time you call, but will be leaving shortly, they should be included in the household, as that is still their main residence at the time you are calling on the household.

### **People to ask for proxy information**

The person providing the information should be any of the following: spouse/partner/parent. You should not use anyone under 16. You should try not to use a young adult (e.g. aged 16-20) unless there is no alternative. In cases of proxies used because of age or infirmity you should try to carry out the proxy interview with someone who acts in a caring capacity if possible.

DO NOT seek a proxy interview on a household member who has actually refused to be interviewed and NEVER take a proxy interview directly with a subject because they seem unwilling to give a full interview.

### **Other Aspects of the Interviews**

#### **Verbatim Responses.**

There are several questions which require open-ended responses. An example is **D4**: What is the main reason why you would prefer to move ?

In all these cases you must, firstly, record precisely what the respondent says. It is important that we are able to code these responses effectively so please do not interpret, abbreviate or select responses. This applies even if the answer seems irrelevant to you, as such answers themselves might tell us that there is something wrong with the way we are asking the question.

Secondly, you must encourage the respondent to give as full a response as possible. If the answer seems unclear or inadequate, or if you feel more information might be forthcoming, probe for further clarification. One of the most important examples of where this probing is necessary is E6: “What was your main job last week? Please tell me the exact job title and describe fully the sort of work you do”.

Answers like ‘engineer’ are inadequate. You will need to probe for 1) type of engineer such as ‘civil’ (as opposed to mechanical or electrical), 2) full job title, such as Senior Resident Engineer, and 3) details of the job which would help identify both the precise occupational status and exact type of work.

#### **Forcing Choices**

There will be several occasions when the respondent is asked to provide one answer but insists on giving more than one. In such cases you should re-read the question with appropriate emphasis on ‘*Which one...*’ for example. If the respondent still cannot decide, then as a rule you should ask firstly, ‘*Which one do you think... ?*’, or failing that ask, ‘*Which one do you think is most important...*’ and so on.

## **THE PAPER DOCUMENTS**

### **Wave 1 Questionnaires**

All of your survey documents are on paper. The Household Questionnaire takes 10 minutes on average to complete. The Individual Questionnaire will take on average 45 minutes to complete, even though this length will vary depending on the circumstances of the individual. For example, someone who is employed and has had some job changes during the last year will have a longer interview than someone who is retired altogether from employment.

**1. COVERSHEET** A detailed Coversheet is needed in order to record whether the address is eligible for interview or not and if it is eligible, to record the current household membership. After all the interviews have been completed you will return to the Coversheet to record the interview outcomes. The Coversheet also incorporates the Update and Tracking form. This is the means we will use to enter the names of the people living in the sampled addresses as you return the forms during fieldwork. You must complete and return this form for all of your addresses, regardless of whether they are interviewed or not. The form also allows us to collect contact information in case the respondents move before next year.

**2. SELF-COMPLETION** For all respondents answering the Individual Questionnaire. This contains questions on attitudes, satisfaction with different areas of life, and friendships.

**3. PROXY QUESTIONNAIRE** Use this for eligible people potentially willing to be interviewed but whom you are unable to contact or interview during fieldwork. Please Remember that the Proxy Subject is the person you are asking the questions about and the Proxy Informant is the person who answers the Proxy Questionnaire.

### **Change of Address Cards**

You will have some blank Change of Address cards in your work packs. If you find that a respondent will be moving in the very near future and they know their new address, please complete this card with the issued address details and the name and new address details of the respondent and return it to the Institute. The card is Freepost so does not need a stamp.

## **QUESTIONNAIRES**

The Household Questionnaire and the Individual Questionnaire - These are separate questionnaires and for each household you should complete one Household Questionnaire and as many Individual Interviews as necessary. The Household Questionnaire is normally asked of the Household Reference Person (HRP) or spouse even though in some cases it can be answered by other household members. **A Household Questionnaire must always be present for every interviewed household** even if some questions are 'don't know' as the person you are talking to does not know the information e.g. mortgage or rent costs.

Date of interview: You must enter the date of the interview carefully.  
Please enter the start time of the interview using the 24 hour clock.

On showcard questions the numbers for each response are printed on the card and also appear on the questionnaire beside the response categories.

Every question must be answered before you can continue. Where appropriate, 'don't know' and 'refused' codes are provided on the questionnaire.

### **Question types**

You will come across several main question types:

- Single response questions
- Multiple response questions, usually with an exclusive code for 'don't know' or 'not answered'. Where applicable, a 'none' code is also provided.
- Grid questions e.g. F3 in the finance section
- Verbatim text entry
- Questions with a date to be entered
- Questions with an amount to be entered (pounds, hours etc.)

### **Entry of amounts**

Amounts are entered directly into boxes. You must always enter leading zeros and check you are entering the amount accurately. In all cases you will have some combination of a 'don't know', 'refused', 'nothing' or 'same as now' codes.

In the employment section there are some questions on the hourly amount people are paid. On these questions you are asked to enter the amount in pounds and pence and to code whether the amount is an estimate or exact. Separate 'Don't know' and 'refused' codes are also provided.

## **COVERSHEET**



Your sample is issued to you by means of the Coversheet which has the address you are to call at pre-printed in the top left hand box.

The Coversheet is the key document for a number of functions crucial to the survey:

1. Determining whether the address is a residential address eligible for interview.
2. Defining household membership to provide the basis for completing this year's household grid and to show who is eligible for an individual interview.
3. Recording household and individual interview outcomes.
4. Where households do not agree to take part, recording the reasons for the refusal and some details about the household.

Because of the special importance of these functions for the survey it is essential both that you understand clearly how to complete the Coversheet before you make any calls and that you carry out the various procedures methodically and consistently.

**If at any time you are uncertain about how to proceed in completing the Coversheet you should consult the Institute as soon as possible**

### **Labels**

You have been given a set of labels. These will have your sample addresses on.

1. Before you start work you should stick the address label onto the front page of the coversheet in the 'Issued Address' box in the top left hand corner.
2. The second address label is stuck onto the Update and Tracking form in the 'Issued Address' box in the top left hand corner.

### **Enumerating the Wave 1 Sample**

#### **Eligibility for interview**

Interviews must be sought with all people aged 16 or over on or before June 1<sup>st</sup> 2002.

#### **Household ID**

This is the identification number which is to be transferred to the Household and Individual questionnaires. It is used to link documents and information for members of the same households. It is thus essential that this number is transcribed both accurately and legibly.

### **The Household ID consists of:**

<b>Wave No:</b>	This is 1 for the first wave of the survey.
<b>Serial No:</b>	A five digit number identifying the address.
<b>Household No:</b>	When the sample is issued at the beginning of fieldwork this will always be 0. If you find any multi-household addresses, this will be incremented to 1 or 2 as appropriate.
<b>Check No:</b>	This is for checks made at the data entry stage

### **Issued Address**

This is the address sampled from the list of all Newham addresses

### **Address Status**

This is for you to code the status of the address. We need to know whether the address is correct. If any corrections need to be made to the address these need to be recorded.

#### **This is the issued address**

If the issued address details are correct code '1'

If there is an error in the postcode, you should circle code '2'

If other pre-printed address details are incorrect or missing please enter the changes to be made and circle code '3'.

'Code all that apply' where multiple corrections are required.

When entering the postcode do not add leading zero's.

**Work/contact no:** This space has been provided for you to place a work or contact phone number if the respondent volunteers this information. If we have to trace a person through this number it is crucial that we know who the number corresponds to. Please make sure that if you give a contact telephone number, you write in a corresponding respondent number (e.g. resp 01) and any details such as 'work number' or 'mother's number'.

### **Interviewer area boxes**

There are two of these, the 'issued interviewer area' and the 'actual interviewer area'. The 'issued interviewer area' number should not be altered in any way, regardless of which interviewer finally interviews the household. Any amendments, due to re-issues to a different interviewer should be entered in the 'actual interviewer area'. For the majority of cases the 'issued interviewer area' and 'actual interviewer area' will remain the same.

### **Call Record**

Record here all calls made. Use the end box to show 'no reply', 'made appointment', 'time of appointment', and to record progress - e.g. 'wife interviewed, husband in

after 6pm only'. Record the total number of calls made at the issued address on the label. **Please code personal calls only and not those made by telephone.**

### **Coding Type of Accommodation - page 3**

**Please ensure that questions 1, 2 and 3 on page 3 of the Coversheet are completed for EVERY eligible address, even if you do not interview the household.**

The types of households that refuse to take part in surveys tend to be different from those who do take part and we need this information to check that the sample we do interview are representative of the population as a whole, as well as for statistical adjustments to ensure we have the correct proportions in the final sample.

### **HOUSEHOLD GRID - PAGES 4 - 5**

The Household Grid should be completed for each interviewed household and must be completed before any interview is done at an address. An interview cannot be undertaken until a full record of household membership exists in the Household Grid.

### **COMPLETING THE HOUSEHOLD GRID**

You must complete a row of the Grid for each household member. The basic rule for the grid is that every box must be filled for each person in the household, using '0' where a question does not apply.

#### **1. Person Number and Name**

Ask for the title, first name and surname of every person living in the household, including children aged under 16. Write in the details for each person starting at Person 01. You do not need to do this in any particular order but please list adults over 16 first followed by children if these are present.

#### **2. Relationship to Reference Person (HRP)**

First you will need to determine who is the HRP. The Household Reference Person (HRP) is defined as the person who either:

- a) Owns the accommodation.
- b) Is legally responsible for the rent.
- c) Has the accommodation as an emolument or entitlement (e.g. rent free with job).
- or
- d) Has the accommodation by virtue of some relationship to the owner or lessee where this person is not a member of the household (e.g. person living rent free in property belonging to a relative).

Where there are two or more people who qualify to be HRP under the rules above the eldest is the HRP. **The HRP does not have to be Person No 01 on the household grid.**

Establish who is the HRP and write in 'HRP' next to this person's name. Then ask for the relationship of all others in the household to the HRP and write in. Where children of the HRP are reported check for exact relationship to the HRP and write in where the children are step children or adopted.

#### **4. Date of birth**

Ask for each person's date of birth and enter this using a four digit year please. If the person you are talking to cannot give you this information exactly then please check with the person themselves when you speak to them.

#### **5. Age last birthday**

The age of new-born children less than one year old should be coded '00'. For those under 16 code the following columns 6, 7 and 8 as 0, 00 and 0 respectively.

Please ask the respondent for a best guess if the date of birth of someone in the household is not known and you do not succeed in interviewing them. It is very helpful if we can at least find out whether they are a child or over 16.

#### **6. Marital Status**

Ask as a running prompt for all household members aged 16 or over 'Are you/is this person currently married, living with a partner, widowed, divorced or separated or have they never been married?'. Code children under 16 as 0.

Please note: A current household relationship takes precedence over any other, as the purpose of the grid is to understand relationships within the household. Legal marital status is dealt with in the individual questionnaire. Thus a married person living apart from his or her spouse is coded as separated, not as married. A married but separated person living with someone else is coded as living together. A divorcee or widow who has remarried is coded as married, or as living together if cohabiting.

It is important not to code friends sharing accommodation as partners, but equally, there might be cases where couples appear at first sight only to be friends. If these relationships become apparent during interview you might then need to amend the household grid.

Those who describe themselves as living together with a partner of the same sex should be coded as living together.

#### **7. Spouse/partner number**

Ask if each person's spouse or partner lives in the household. It is important that partners (those coded as living together) are included in this column. Code their

person numbers in the relevant columns. The relationship to household reference person column will not always reveal people who are married or living together (for instance, a young couple living with one of their parents where the parent is reference person). Please take care to code correctly and consistently, however obvious relationships might appear in most instances. If the person does not have a spouse or partner enter 00.

## **8. Paid Employment**

Ask 'Last week, were you/was this person in paid employment at all, including being away temporarily from a job they would normally have been doing?'.

### **'In paid employment' includes:**

1. All those who did any paid work last week (either as an employee or self-employed) even if only for a few hours in casual work.
2. All people temporarily absent from their job.
3. All those on Government Training Schemes (e.g. ET or YTS) with an employer, and those paid by an employer while attending an educational establishment.
4. Wives working in a husband's business for any number of hours and who receive payment or a share of the profits are coded as 'working'. Those working unpaid for 15 hours or more are also coded 'working'. (The same applies to other family members doing similar work.)
5. Students who were working last week - code as 'working'.
6. People paid a wage or salary by an employer while attending school or college, including people on employer-based training schemes - code as 'working'.

### **'Not working' includes:**

1. All those who were looking for work last week or who would have done so but for illness or injury or holiday, even if they are waiting to start a job already obtained or waiting for the result of a job application.
2. Those who are retired from paid work altogether. People who have retired from an earlier occupation but who now have another paid job (if only for a few hours a week) are 'working' (but exclude voluntary work).
3. Those persons who last week were attending a school or college full-time, unless as part of a paid job or government training scheme.
4. Those unable to work through long term illness/disability and those attending industrial rehabilitation centres or adult day centres.

## **9 & 10. Father/Mother Number**

Check for all HH members (where necessary) if each person's father and mother lives in the household. Check that these are natural parents only. The purpose of this code is to ensure that we can distinguish between natural and step parents. It is quite

common, for instance, for a mother to be natural and a father to be a step-father. Please take care to ensure you transcribe the correct number (i.e. the person number of the parent) to the row containing details of the child. You will not of course need to ask the question where then can be no parent in the household (e.g. single person or couple only households) but always check in all potential cases of parentage. If a father/mother is not present in the household enter 00.

## **11. Responsible adult**

At one section of the individual schedule you will be asking questions about children of the responsible adult. The responsible adult is the mother, or mother figure, of the children in all cases with one exception. If someone is a legal stepmother they may still be the responsible adult. However if a couple are cohabiting and the woman is not the child's natural mother, she is not the responsible adult. In this case (and if there is no mother present at all) the father is the responsible adult.

## **12 & 13. Absent members**

If you have established that someone who is normally resident will be absent for the period of fieldwork, please code that they are absent at Col 12 and code the reason for absence at Col. 13. Please ensure that you follow the rules for inclusion as a household member correctly. If in doubt, check pages 11-13 in these instructions.

**When you have completed the household grid please check the details. Small errors can lead to great problems for the coders. You should have completed a line for each member of the household, if certain questions did not apply to them (e.g. spouse number for the never married) then 00 should be entered. No boxes should be left blank.**

## **RECORDING INDIVIDUAL OUTCOMES**

**Once you have completed each interview, you should return to page 6 of the Coversheet to code the outcome for each individual.**

**Column 14:** If you have completed the Household Grid with a respondent there must be an Interview Outcome for every person listed. This includes those not interviewed, such as proxies and children under 16.

Any refusals (code 03) recorded here will be at the individual level. That is those which occur after you have gained entry, i.e., after you have spoken to someone in the household. You may code individual refusals for every member of a household if they have all refused individually to you.

A refusal at the door which stops you getting any contact with any household members would be coded as a 'Refusal to Interviewer' (code 31) in the Final Household Outcome box on Page 8 of the Coversheet and column 14 would be blank.

**Column 15:** Please code the language in which the interview was conducted.

### **TRACKING INFORMATION – PAGE 7**

The aim of the tracking information is to ensure we do not lose touch with respondents. The tracking section must be completed for every interviewed household member aged 16 or over. We need one separate contact name for each interviewed household member in case they separate from the rest of the household.

First check the respondent's full name, and any other name they may be known by. Then ask for the name of someone outside the household, such as a friend or relative. It is particularly important that names and addresses on the tracking section are legible. Next year an interviewer will have to find these people again. Make sure you ask for full information at Question 2, including postcode and telephone number. It is vital that we can trace people if they move, therefore the tracking information must be clear and detailed.

Finally you should check at Question 4 whether or not someone is likely to move from their current address within the next year. If they are definitely moving you should then check if they have a specific new address to move to. If the new address is known then record this on a Change of Address card and return this with the other documents for the household.

Please try and get full tracking information for adult respondents i.e. 16+ who have done a full interview.

### **HOUSEHOLD OUTCOME - PAGE 8**

If the address is ineligible e.g. an institution, demolished etc. use codes 01 to 07 as appropriate.

If the address is eligible for interview you should use codes 10,11 and 12 for co-operating households and codes 21 to 33 for non-co-operating households.

Only use code 10 if you interviewed all eligible members of the current household aged 16 or over.

### **HOUSEHOLD REFUSAL/NON INTERVIEW INFORMATION - PAGE 8**

Please specify in more detail the reason for any household refusal or non-contact you get. We need to know as much detail as possible about those we couldn't interview.

Where it is not possible to make contact at a household, you must make every attempt to find out how many people are resident at the address, how many are aged over 16, the age and sex of the person you spoke to and record these details at the bottom of page 9. This is vital information we need to help us adjust the findings of the survey

to allow for the types of households that have not been included. Please try and ensure you collect and record this information where possible.

## **INFORMATION FOR NEXT YEAR - PAGE 9**

If there is anything which you think would be helpful in re-contacting the household next year please note this here. These comments will be used next year to help you or another interviewer make contact.

## **HOUSEHOLD QUESTIONNAIRE**

Please ensure that a Household Questionnaire is present for all households where at least one interview is achieved. Even if some or all of the questions cannot be answered by your respondent, you should complete as much as you can and use the 'don't know' code or write in 'refused' or 'don't know' as necessary.

- H1** Exclude any rooms currently or usually sublet to persons outside the household but include any rooms solely occupied by lodgers within households. You should already know if lodgers are present, if necessary check 'Does this include the rooms occupied by .....?'

Exclude conservatories

- H2** Shared ownership includes co-ownership and equity sharing schemes: a share in the property is being bought. The occupier may never become the sole owner of the property but will receive a cash sum on leaving the scheme.

Where accommodation is owned or part-owned by ex-spouse or separated spouse or spouse away on business for six months or more treat as 'owned' (code 1).

Do not count as rent-free cases where a rent would normally be paid but the whole amount is rebated (or paid direct to the landlord by the DSS through Housing Benefit).

Code people who live in rent free accommodation owned by relatives as 'rent free' If rent is paid for them by a relative or charity this should be recorded as a regular receipt in the finance grids.

- H3** If part owned with someone outside household enter 00 for this person and give details.

If household rents, give person actually responsible to landlord for rent. With adult sharers establish if there is a joint tenancy or if it is in one or two person's names, with others paying their share of the cost to them.



If rent-free, give number of person responsible for the rent-free occupancy by virtue of job or family position.

**H8** Accept estimate if exact year not known. If accommodation was previously rented by household members who then purchased as sitting tenants record year bought outright or first started paying mortgage.

**H9** We need here the total purchase price of the property including any payment for the land, fixtures and fittings, garages etc. If respondent purchased with others : record total cost rather than respondent's share.

**H13** We require here the total amount of any further additional loans (including second mortgages) secured against the property after the initial loan even where the money has not been used for property improvement or repair.

Where a property has been remortgaged (i.e. a mortgage taken out to pay off an earlier mortgage and provide an additional amount) count the difference between the mortgage paid off and the remortgage towards this total.

**H18** If the household rents, give person actually responsible to landlord for rent. With adult sharers establish if there is a joint tenancy in the names of all members of the household, or if it is in one or two person's names, with the others paying their share of the rent to the legal tenants.

If rent-free, give number of individuals responsible for the rent-free occupancy by virtue of job or family position.

**H19** Any household whose accommodation is tied to the job of one of its members this should be coded 06 or 09 as appropriate. People in tied accommodation whose employer is a Local Authority or New Town should also be coded 06.

**H20** In any doubtful case ask 'What is the agreement with your landlord?' and code accordingly.

**H21** Do not count as rent-free cases where a rent would normally be paid but the whole amount is rebated (or paid direct to the landlord by the DSS through Housing Benefit).

Code people who live in rent free accommodation owned by relatives as 'rent free' If rent is paid for them by a relative or charity this should be recorded as a regular receipt in the finance grids.

**H22** If normal amount paid includes payment for hot water or heating, or rent for amenities such as garages, try to get the amount paid for rent only. Where it is not possible to get a separate rent amount, record whole amount paid and extra items paid for at H24.

**H24** Include farms as 'land or business premises'.

**H25** Both rent rebate and rent allowances are forms of housing benefit. If the recipient is in council accommodation they will receive a rent rebate, i.e. pay a reduced rent. But if the respondent is renting privately then a rent allowance will be paid either directly to the recipient or to the recipient's landlord.

**H29** Applies to any accommodation lived in by HRP or spouse during the past 12 months, not just current accommodation. If a mortgage has only recently been taken out refer to previous housing situation.

**H31** Exclude cases where non-payment was accidental (e.g. the bank failed to pay a standing order).

**H32** A separate kitchen: If the household cooks in a room which is used both as a kitchen and as a dining/living room, "yes" should be coded, provided it is not also used for sleeping. A bed-sitter with cooking facilities does not have a 'separate kitchen', but a house with kitchen-cum-dining room does.

A place to sit outside: A private garden would be exclusive to the household. A shared or communal garden could include a rooftop garden, a patio, a terrace or a large balcony designed for sitting out on.

A 'shared' facility is one where someone other than those household members on the household grid has use of the facility as part of their accommodation e.g. a shared bathroom for several flats or a communal garden area.

**H33 – H34** This is an approximate amount for the whole year.  
Central heating includes any system where two or more rooms are heated from a central source. If a household has only one room, treat as centrally heated from central source along with other rooms in the house/block.

**H36** The objective is to assess whether the respondent feels any of the listed items to be a problem for the household. Each item must be read out individually and 'yes' or 'no' coded.

Too dark, not enough light: This refers to natural light rather than artificial light. Code 'yes' if they feel they have a problem with any of their rooms being too dark, not necessarily all of them.

Heating facilities refer to the equipment or means of heating, not the cost of providing the heating - unless high cost is considered as a characteristic feature of the type of heating facility and hence a problem.

**H37** This question refers to the Council Tax valuation bands, not the market value of the respondents house. Please ask them to check their Council Tax bill if possible.

Many renters may not know the band if it is included in their rent. Code these as 'Don't know'. If the household accommodation is not valued separately e.g. a granny flat or a bedsit code '09'.

- H38** Include both owned and rented items.  
 Include items made available by the landlord or others for personal use by household members.  
 Include second hand purchases.  
 Include home computers even if only used for games, but only if it has a keyboard. Include computers used for business purposes by self-employed people, but not those provided by employers for work at home.
- Exclude any items which are broken and will not be repaired.  
 Include hire-purchase and credit sale but not rentals with a future option to purchase.  
 Exclude gifts or loans to household members from persons outside the household, but include gifts between household members.
- H38** Category d) Interactive TV – this refers to the ability to send emails and surf the internet using the television.
- H40** DWP Social Fund loans are normally paid back through a reduction in benefit.
- H41** This question applies to the household rather than individual members of the household.
- H43** This question is about ability to pay, regardless of whether the household actually wants the item. They are asked to say whether they could afford them if they wanted them. The answer is ‘yes’ if it applies to any adult household member, not necessarily the whole household. Do not include holidays which do not have to be paid for, such as staying free with friends or relatives.
- H44** If some food is not bought weekly attempt a weekly estimate. Include meals bought from ‘takeaways’ but eaten in. Exclude meals eaten outside the home.
- H45** Include vehicles on long term hire and company vehicles if for private use. Exclude those hired from time to time and if used solely in the course of work and vehicles currently unfit for use if there is no intention to repair.
- H46** If owned by friends within the household - code ‘1’.  
 If paid for with mobility allowance - code ‘1’.
- . Exclude if owned by friends outside the household.

## **INDIVIDUAL QUESTIONNAIRE**

### **NEIGHBOURHOOD AND INDIVIDUAL DEMOGRAPHICS**

This section provides us with information about people's backgrounds. This is important in its own right and also for comparison with the Census.

**D6** Lived here continuously (other than being away for holidays, in hospital etc.). If respondent has lived in address more than once (e.g. has returned after being away at college etc.), the relevant date is the beginning of their current spell of residence.

**D9** Own job only. Exclude cases where people have moved because of spouse's employment.

**D15** For those born in the UK we need to pinpoint the precise location. Therefore, if a respondent gives the name of a village enter the county also. If respondent mentions a town or city, probe for which district it is in.

**For respondents born in the UK, place of birth is recorded on their birth certificate.** If respondent gives name of hospital probe for where birth registered.

**D20** If the respondent is separated, but not legally separated, they are coded as married at D31 and separated on the Household Grid at column 8.

**D25** This question has been used in the 1991 Census. It is important to us to be able to compare our data with census data.

**D37** Code one only. If respondent says more than one applies ask them to choose which single description best applies.

**D38** If respondent tells you that they left school before reaching the minimum school leaving age - currently 16 - because his or her birthday was in the holiday period between school years or terms, record respondent as having left at the then minimum age.

**D39** Elementary, secondary-modern and technical schools are nearly always forms of schooling no longer available. However, some school-age children may still go to educational institutions using 'technical' in their title, such as City Technology Colleges. Code these under 'other'

**D41** Full-time course only. Exclude courses under three months.

Exclude part-time, correspondence, and Open University courses, and courses run by employers for employees.

Include sandwich courses, nursing school and teaching hospitals (even when respondents are also working in the hospital).

If attended more than one, code most recent.

- D44** In case of doubt about any qualification (e.g. those obtained abroad with no direct equivalent), write in details.

Do not count first aid Certificates as nursing qualifications. Do not code the following as Nursing qualifications but as 'Other technical' and give details: Health Visitors' qualifications, Nursery Nurses (e.g. NNEB) and Dental Nurses' and Hygienists qualification.

If teaching qualification is a degree then code as degree.

Count degrees obtained overseas as first or higher degree as appropriate.

If a respondent has a City and Guilds certificate but cannot give grade or part passed, assume it is part I (code 04)

If respondent has Scotvec Higher National Units or NVQ3/SVQ3 try and match these with an equivalent qualification on the list, possibly use the higher of the two codes.

Only use the 'other' code if you are certain the qualification does not fit into any of the categories 01 to 13. When recording 'other' qualifications please spell out abbreviations. Also it is very important to know the qualification and year gained as well as the awarding body.

- D47** School qualifications: please note you must obtain numbers of each qualification passed.

- D52 – D57** These grids collect details of all training schemes or part-time courses taken in the past year excluding periods of full time education.

- D52** If more than three training schemes or courses complete grid for three longest, starting with the most recent course. Include courses that have started but not yet finished.

- D54** The 'main' place is where the most hours of teaching or instruction were done.

- D57** Include direct fees paid for course but exclude living / travel / other expenses associated with the period of education.  
Code 03 'employer / future employer' includes past employer.  
Code 05 'New Deal Scheme' for those aged 16 - 24 and for lone parents unemployed for more than six weeks.  
If employer provided training (on or off job) code 03

## **HEALTH AND CARING**

- M2** Where respondent gives the name of a specific condition other than those on the card (e.g. angina or multiple sclerosis) code as 'other' and record the name given.

Where respondents query 'difficulties in seeing' this excludes those able to read normal size print (e.g. a book or a newspaper) with the aid of glasses and those who need glasses only for specific activities such as driving.

- M12** 'Talking to a doctor' can mean seeing the GP (at home, surgery etc.) or speaking to a doctor on the telephone.

You should include visits only if the respondent actually talked to the doctor, i.e. exclude cases where respondents just called to pick up tablets or a prescription, make an appointment, receive treatment from a nurse or accompany another person etc.

Exclude hospital based doctors but include visits to specialists (e.g. clinical psychologists) where these were seen at a local surgery or health centre.

- M13** Do not include visits to accident and emergency wards.  
Include regular visits to clinics based in a hospital.

- M16** Include patient stays in private hospitals and clinics, nursing homes, institutions for the mentally ill etc. - places where respondent had to stay for some illness, condition, operation, etc.

- M17** Probe for best estimate.

- M20** Code both private treatment in NHS hospital and visits to or treatment in private hospitals or clinics as all paid for privately.

- M23** Include use of services by respondent only.

- M24** As above.

- M25** Check whether paid for all services including NHS/SSD

Include as 'paid' any services paid for by respondent or by someone else (e.g. other members of the household, relatives, employer, insurance etc.) on behalf of respondent. If respondent has used both paid and free services in the last 12 months, code 3.

Where respondent was referred to service by GP, record as NHS.

**M30** Exclude tests which are included as part of other treatment, e.g. blood pressure test after an accident.

**M32** Where checks were provided through employment record as NHS if carried out by NHS medical personnel. If employer arranged for private medical health check, record as private. If carried out by employee of workplace, record as NHS.

Include medical checks for service personnel and prisoners and prison staff as NHS.

Record as NHS where treatment is NHS although fees may have been paid, e.g., for eyesight test.

**M36** Occasionally a person may not think of the care they provide as special because they either may have been looking after this person for a long time or because they view it as a natural obligation to look after a close relative; or because they think it normal to provide special care for the elderly.

In some cases you may already know of someone in the household who is infirm or disabled. If you have reason to believe that someone within the household is receiving regular care because of age, infirmity or disability but this is not reported by the respondent you should ask 'And what about (NAME OF PERSON)? Do you look after them at all?' If the respondent does not agree, code answer given but make a note on the questionnaire and proceed to the next question.

**M38** Include any service provided including visiting, sitting with them, keeping company, taking out, checking whether or not they are all right, help with bills etc., as well as help with housework, cooking and personal care (e.g. washing or dressing).

Include only 'one-to-one' caring so that if, for instance, someone helps with meals-on-wheels or driving people to hospital this, in itself, does not count since they maybe seeing different people each day. If, on the other hand they are paired off with one specific elderly/disabled person this would count.

Include here cases where person cared for is in the same building as respondent but lives separately (e.g. a 'granny flat' or annexe).

Exclude any care given in the course of employment (e.g. by social worker or home help) but include if they do other work unpaid outside working hours.

Exclude work in drop-in centres, luncheon clubs or meals on wheels.

Some respondents will be caring for people as a voluntary worker rather than as a friend or relative. If caring for two parents living together, code each separately.

- M42** Please note that if respondent spends time caring for people within and outside the household the total time spent on both together should be entered. Include any travelling time or time spent sleeping at dependant's house if dependant is outside carer's household. If continuous care is given use code 07.

## **EMPLOYMENT**

**E1** Include as 'working last week':

- employment for any number of hours, including Saturday jobs, and casual work, e.g., baby sitting, running mail-order clubs etc.

NB Since some informants may not consider casual work to be serious work, please be prepared to probe those (e.g., housewives with dependent children, full-time students) to whom you feel this may apply.

- anyone who was paid a wage or salary by an employer while attending an educational establishment.
- a wife working for any number of hours in her husband's business as long as she was paid, i.e., received (or will receive) an amount of money in remuneration or a share of the profits.
- a wife, working unpaid, in her husband's business provided she works 15 hours or more per week.
- anyone else working in a friend's or relative's business, as long as he or she received (or will receive) an amount of money in remuneration or a share of the profits.
- Students on 'sandwich courses' currently with an employer or those on employer placements should be coded as employed only if they receive regular payment from the employer.

### **Student nurses**

Training for nurses is in transition. Some nurses are still being trained under the traditional arrangements whereby they are employed as trainees at a specific NHS hospital. These nurses should be treated as employed for the purposes of this section (coded 1 at E1) and in the subsequent job histories.

A number of nurses are being trained under the PROJECT 2000 scheme which is mainly based in colleges outside hospitals. These trainees should be regarded as full-time students. Unless they have other employment outside their PROJECT 2000 course they should be coded 2 at E1 and E2.



For student nurses always check if the nursing training course is part of PROJECT 2000 and proceed accordingly. If the respondent is unsure treat as employed.

### Government Training Schemes

Such schemes are not now generally run directly by Government Departments (such as the Employment Department or Training Agency) but are organised and delivered by local Training and Enterprise Councils (TECs). In most cases the TECs (LECs in Scotland) will contract out the management of the programmes to Managing Agents, often private companies.

For the purposes of this section, the crucial information is where the respondent is based for their training. If a respondent was on such a scheme last week, they should be coded as employed if they are 'employer based'. This is defined as:

- 1) Last week they were with an employer or on a project providing work experience or practical training; or
- 2) If they are normally 'employer based' but were away last week because of illness or for some other reason (including attending a college based course).

If respondents are not normally 'employer based', that is they usually attend a college or other training centre, they should be coded 2 at E1 and E2 with the following exceptions:

- 1) those who have employment outside the training scheme. Code here as employed and take details of this secondary employment.
- 2) those sent on training schemes by employers who continue to pay their wages or salaries. Treat as employed and code 4 at E3. Record details of their job with the employer who has seconded them to the training scheme.

**E2** Include any persons who were absent because of holiday, strike, sickness, maternity leave, lay-off, or a similar reason, provided they have a job to return to with the same employer. Do not include those receiving redundancy payments who have no job to return to. Do not include people who have a job arranged but have not yet started work in it; such people should be coded 3.

A job exists if there is a definite arrangement for work on a regular basis (i.e. every week or every month) whether this work is full time or part time. The number of hours worked each week may vary considerably but as long as some work is done on a regular basis a job exists.

**E3** Code one only: if more than one reason ask respondent 'And which of these would you say was the main reason?'

Maternity leave: only women who are on the special period of maternity leave allowed either by law or their contract should be included here. Any other leave taken for reasons of child bearing or child rearing should be coded 7.

Any leave taken for pregnancy related sickness not covered by maternity leave should be coded 3. Count women on maternity leave from a job as employed even if they say it is their intention not to return to their jobs at the end of the statutory or contractual period of leave.

**E4 – E51** If respondent has more than one job, these questions should be answered with reference to their main job. The ‘main job’ is the most remunerative. If equal earnings then it is the one with the longest usual hours. If a respondent is a seasonal worker who switches between jobs at different times of the year, then ‘main job’ is the one being done last week.

Where a respondent changed jobs in the last week (that is in the seven days ending on the Sunday before interview) we require details of the job being done at the end of the week. Where he or she left a job last week and do not as yet have other employment treat as non working.

**E4 & E5** A permanent job is one which has no specific time limit even if a period of notice is required for dismissal.

**E6** Please remember your general training as an interviewer that asks you always to probe for as detailed job description as you can get including title, qualifications or apprenticeships, responsibilities etc.

**E8** Accept respondents’ answers except:

- where there is doubt try to find out how they are described for tax and National Insurance purposes. For self-employed, tax is not normally deducted at source but paid directly to the Inland Revenue. People working as child minders or odd-jobbing etc. are usually classed as self-employed. If someone is self-employed and works under contract to an employer, he or she may be treated as an employee for tax purposes (e.g., in the construction industry). Treat such people as self-employed.

For all directors and managers who say that they are self-employed, check whether they work for a limited company. If they do, code them as employees for tax and NI purposes.

An employee working through an agency (e.g., secretary, nurse etc.) may either be an employee of that agency (i.e. the agency pays part of their NI contributions) or an employee with each different employer they go to.

Further notes on the self-employed may be found at E59.

**E9** A manager may manage other employees through supervisors or directly, and may have a more general responsibility for policy or long term planning.

Foremen and supervisors have day-to-day control over a group of workers whom they supervise directly, sometimes themselves doing some of the work they supervise.

Job titles can be misleading (e.g.. a ‘playground supervisor’ supervises children, not employees and so should be coded not a supervisor). A stores manager may be a store-keeper and not a manager or supervisor of employees.

- E11** Make sure that your respondent realises that we are interested in the total number of employees at the workplace, not just the number employed within the particular section or department in which he or she works. Include part time and shift workers.

If a respondent works from a depot or office (e.g. a service engineer), base the answer on the number of people who work from that depot.

People employed by employment agencies should answer these questions with reference to the place at which they are currently working (or last worked) rather than the agency. Where someone employed by an agency worked at several different workplaces in the course of a week the answer should refer to the place where he or she worked the greatest number of hours.

Similarly, people working for sub contractors or merchandisers within a larger workplace should answer with reference to the larger workplace (for example, school meals staff should answer with respect to the school rather than the kitchens; and people working on a fish stall franchise within a supermarket should answer with respect to the supermarket).

- E14** In the case of people permanently on call, make a full note of the circumstances and probe for the total hours usually worked when on call (excluding overtime).

If the hours vary or the work is intermittent (e.g. casual workers), try to obtain the weekly average over the past few months.

Round answers to the nearest whole number (i.e. 37.6 hours up to 38. Round .5 to nearest odd number).

- E15** Include unpaid overtime.

- E16** This includes any time for which respondents are paid above and beyond their basic wage or salary. Such overtime payments need not be at any increased rate.

- E18** Code one only. If more than one applies code one which applies to greatest part of working time.

- E21** If respondent works mainly by travelling around or travels to one or more places ask how long it takes to get to an office or depot if this place is visited at least once a week. Note this is for getting to work not the full round trip

time. There is a new code for 'Doesn't apply'. Please only use this code in extreme cases where it is impossible to give any kind of average i.e. the respondent never visits a depot etc.

**E22** 'Main means' is for the greatest part of the distance covered between home and work. Where a 'car pool' system is used where members drive some days and travel as passengers for others code for most frequent in a usual week.

**E25 – E27** Include cases where respondent received Statutory Sick Pay or Statutory Maternity Pay (i.e. is currently on paid maternity leave).

**If it is possible to persuade the respondent to refer to his or her current or last pay slip you should do so.**

Please prompt for approximate amount if 'don't know'.

**E26** The time period is very important, e.g., one day per week = 'week' not 'other'.

**E34** 'Usual pay' should be straightforward for the large majority of cases. If queried 'usually' means since the last change in circumstances affecting pay such as a pay rise or a change of job.

Include bonus or overtime payments, if these are usually received.

If the respondent is on short time the usual pay should be that received before short-time working began.

For seasonal workers record the usual amount earned in a year.

If the respondent's pay varies for a specific number of weeks during the year note the amounts and periods.

Please prompt for approximate amount if 'don't know'.

**E37** Code 3 should normally be used only for tax refunds where larger than normal amounts of tax are deducted code as 'other' and write in details. Use code 7 only where more overtime than usual was worked, where less than normal code 'other'.

**E40 - E42** These questions collect the detail of hourly pay rates. Please code both the amount paid per hour and whether the amount reported was estimated or exact.

**E44** Include 'in house' unions such as company staff associations.

Exclude employers' organisations (e.g. National Farmers' Union)  
Code one only.

**E50** We need to know here when the respondent started his or her current job (that is the job described at E6) for the current employer. If necessary refer to E6 and read details to respondent. If she or he has had one or more spells of working in this job for the current employer, then the start date of the most recent spell should be recorded. For temps, agency nurses, etc., start date is when begun working for the agency itself.

In cases where people have been promoted or otherwise changed jobs with their current employer record the date they started the job they are doing now.

If the respondent's company changed ownership but his or her conditions of work remained the same, do not count as a change of employer but record date began working in current post for the company itself.

If the respondent's employment contract has changed as a result of contracting out, record the date the new arrangements took place.

**E52 – E81** The term self employed covers people who are responsible in their work only to themselves and who do not receive a wage or salary from an employer. Tax is not normally deducted at source but paid directly by them to the Inland Revenue.

However, company directors and managers are employees of their companies.

'Self employed' includes people who are temporarily sick but would be working in a self-employed job if they were well.

Self-employed can be for any number of hours, e.g. as little as one hour provided the work is regular.

In addition to persons such as sole or part time owners of a business, the following are considered to be self-employed: doctors in private practice, farmers, landlords/landladies who manage their own property, and people with recurring freelance jobs such as musicians or journalists. In recent years there has also been a growth in the number of people employed by firms to carry out work on a freelance basis that they were formerly directly employed to do.

Building workers on the "lump" sum (self-employed labour-only sub-contractors) should be classed as self-employed. These workers are usually paid a wage by the contractor and have the standard rate of income tax deducted from that wage. They are however responsible for payment of their own National Insurance contributions.

Respondents receiving Enterprise Allowance must be coded as self-employed. All relevant self-employed questions should be asked but the allowance received should not be included as income at E68 but in the Household Finances Section.

- E52** 'Employees' covers anyone directly employed by the respondent (other than the respondent him or herself) where they pay wages and are responsible for Tax or NI deductions etc. Exclude those employed by firms as consultants etc. Exclude fellow partners in professional practice or business. These are all separately self-employed.
- E57** Those who are paid for labour only, may keep accounts for presentation to the Inland Revenue and have an accountant, but they should only be coded '1' if they regard themselves as having a specific small business.
- E60** Take any period for which figures are available.
- E61** Include any money subsequently put back into the business.
- E64** This may be Class 2 or Class 4 NI.
- E65** Take any period for which figures are available.
- E69** This may be Class 2 or Class 4 NI.
- E74** Code one only. Someone who works at home does the major part of their work there (e.g. someone running a home typing service). Someone who works from home has the home as their base (e.g. for telephone calls) and travels to customers' homes or businesses to work e.g. a plumber.
- E77** If respondent works mainly by travelling around or travels to one or more places ask how long it takes to get to an office or depot if this place is visited at least once a week. Note this is for getting to work not the full round trip time. Please only use the 'Doesn't apply' code in extreme cases where it is impossible to give any kind of average i.e. the respondent never visits a depot etc.
- E81** Here we want to know when respondents' started their current spell of being self employed as their sole or main job. Exclude time spent working self employed on the side while having another main job or previous spells of being self-employed.
- E86** In all circumstances the responsible adult is the mother of the children. If someone is a legal stepmother they may still be the responsible adult.
- However if a couple only cohabit and the woman is not the child's natural mother she is not the responsible adult. In this case (and if there is no mother present at all) the father is the responsible adult.
- E87** If respondent has more than one child who is cared for differently or if a child receives a mix of care, code all that apply up to 3 mentions. In other words , three codes does not have to mean three children. The question refers to numbers of types of child care, not numbers of children.

**E89** 'Paid for' by respondent or by someone else on their behalf. Count as 'paid for' if an employer pays for children to attend nurseries etc. outside the workplace.

**E90** That is how much is paid altogether by respondent or other people on his or her behalf (including by employers).

**E97 – E99** Include as looking for work: being registered at any government or private employment agency; approaching employers; checking newspaper advertisements; making inquiries of friends etc.

**E100** Include as 'Yes' anyone who would like paid work but is unable to take up paid work because of problems due to health, disability, age or having to care for dependants.

**E112** Where a respondent replies that they are currently unable to work at all because of reasons of disability, childcare or other caring responsibilities, you should code '0' here, write a marginal comment and go to E96.

**E135** Those with a main job should be asked about any second job, odd jobs or work done from time to time, apart from that main job. Those with no (main) job should be asked about odd jobs or work done from time to time.

Include any kind of work that generates income as a result of time or effort, e.g. professional or directors' fees, income from a regular second job, casual work done for friends or neighbours or income from the sale of items or produce.

Include only work that generates actual income, exclude any where payment is in kind or reciprocal services.

If the respondent does more than one occasional or odd job record details together and give a figure for total income at E103.

If work is extremely seasonal (e.g. only at Christmas) give monthly average for past year at E103 and E104.

**E139** 'Last calendar month' means, e.g. May 2002 for those interviewed in June. If respondent did not work in their second job last month, then record details of earnings in last month in which they did work in that job.

## **VALUES AND OPINIONS**

**V1a- V1d** If a respondent says 'Don't know' check whether this is because they Don't know or 'neither agree or disagree' and code accordingly.

## **HOUSEHOLD FINANCES**

A major focus of our research programme is on how people go about 'making a living' and how they 'get by'. In addition an overall measure of income is necessary for research into housing, health, employment and other vital matters. This applies whether people are rich, poor or neither.

This section is straightforward and causes few problems. If any respondents query this section you should remind them that anything they tell us is completely confidential. Nothing about them will be recorded in a way that will identify them.

There are many possible sources of income for people, if we only asked about a few sources we would be in great danger of underestimating the incomes of many people. There are also great changes taking place in the relative importance of certain types of income. For example many more people these days are getting quite large incomes from things such as occupational pensions or stocks and shares.

Generally you are asked to record to the nearest pound. You should probe to ensure answers are accurate as possible.

**Please ask respondents to consult relevant documents where possible.**

**F1-F3** For all payments the actual amount received net of any tax or other deductions should be recorded.

Exclude any payments in kind, any redundancy or severance pay, repayment of expenses by employers and any lump sum payments.

**F3d** This is to record situations where payment is made jointly to two or more people, as is the case with some pensions and benefits. This does not include cases where a respondent receives benefits or other payments from which they expect to support other members of their household. If a respondent answers 'jointly' to (f), you should ask 'May I just check, is that payment made to you jointly in both your names?' If not code as sole receipt.

This should be asked in every case and in all circumstances, not only in cases where someone is currently living with spouse or partner. A respondent may now be living alone but during the year a spouse or partner may have left or died and the income they may have shared a payment the respondent for all or some of the time it has been received.



## **Showcard 40**

### **NI Retirement Pension**

For married couples, you should try to get the separate amount paid for the respondent rather than any joint amount. If the respondent is unable to separate it, show the whole amount received and record it as received jointly.

If the wife is aged under 60 she will not be receiving a state pension in her own right. Therefore any NI pension income is solely the husband's.

Retirement Pensions may have an earnings related supplement. This is normally paid on the same order book and should be included in the amount recorded.

### **Occupational Pensions from former employers**

Include all employer's pensions not just retirement pensions. Include pensions paid before retirement (i.e. a respondent may still be working for an employer but has become entitled to receive payments) and pensions paid for early retirement.

### **Pension from a spouse's previous employer**

Women may also be receiving an occupational pension in respect of a deceased spouse: these should be recorded as 03. Check that any amount recorded is net of tax and other deductions. Do not include pensions from a Trade Union or Friendly Society unless the pension is received as a direct result of the respondent's employment by them.

### **Widow's Pension/ War Widow's Pension/ Widowed Mother's Allowance**

Do not include Widow's Benefit (a single lump sum payment)

## **Showcard 41**

<b>Severe Disablement Allowance</b>	Is for people of working age who have not been able to work for at least 28 weeks but who cannot get Incapacity Benefit. Married women unable to perform household work may also receive it.
<b>Industrial Injury or Disablement Allowance</b>	Is a variable amount paid to someone disabled through either a work accident or an industrial disease.
<b>Disability Living Allowance/ Care Component</b>	Since April 1992 this has replaced Attendance Allowance for people aged between 5 and 66 (although many people will continue to call the allowances by their old names). In addition some people not previously entitled to Attendance Allowance will receive this benefit. Those aged 66 or over will continue to receive Attendance Allowances. Where the person is under 16 the Allowance will normally be paid to the person responsible for them. In such cases it should be recorded as income on the questionnaire for the <u>responsible adult</u> for the child. Where someone is 16 or over this should be recorded on the person's own questionnaire.
<b>Disability living allowance/ Mobility Component</b>	Paid for those unable, or virtually unable, to walk as a component of Disability Living Allowance. This benefit replaced Mobility Allowance.
<b>Disability Working Allowance</b>	This is paid to people with disabilities who are under 66. It is meant to help with the problems caused by disabilities for those who wish to work, including easing the process of transition between non-employment and paid employment (and therefore may be received by people who are not actually in paid employment at the time of interview).
<b>Attendance Allowance</b>	Paid to people who need high levels of care because of severe disability. Include Constant Attendance Allowance. If paid for a child under 16 include as mother's income, or if there is no mother then father/guardian.
<b>Invalid Care Allowance</b>	Weekly paid benefit for people of working age who give up working to look after someone receiving Attendance Allowance.

<b>War Disability</b>	Payable to members of the armed forces disabled in the 1914-18
<b>Pension</b>	war or after 2nd September 1939. Merchant seamen and civilians disabled in the Second World War are also eligible. The amount paid varies according to an individual's rank and the extent of the disability.
<b>Incapacity Benefit</b>	This was introduced in April 1995. It replaces NI Sickness Benefit and Invalidity Benefit which officially do not exist any more. If a respondent reports receiving NI Sickness Benefit and/or Invalidity Benefit, code as Incapacity Benefit and record total amount received in grid.

## **Showcard 42**

### **Income Support**

Income Support replaced Supplementary Benefit (sometimes called Social Security Benefit). The rate is assessed on the grounds of age and marital status with a flat-rate premium for children and special premiums for people such as lone parents, people with disabilities and pensioners.

Income Support is often paid along with other benefits as a supplement. You should try, wherever possible, to record the amount of Income Support separately even in the case where it is paid with Unemployment Benefit. The specific amount paid as Income Support will usually be shown on the cover of the Benefit Order Book.

Any maintenance payments from a former or separated spouse or for child support which are paid through the DSS or other government agencies, should not be included as Income Support or any other benefit. These should be recorded using Showcard 43.

### **Jobseeker's Allowance**

This replaced Unemployment Benefit in October 1996. Those receiving JSA are capable of work and available for work and actively seeking work and have a current jobseeker's agreement with the Employment Service. Full-time students, those on temporary release from prison and those receiving maternity allowance or statutory maternity pay are not eligible for JSA. There are two types of JSA - Contribution-based and Income-based. The Contribution-based component is paid in the first 26 weeks of unemployment if enough NI contributions have been paid. The Income-based component is a means-tested benefit (paid after 26 weeks for those who qualify for Contribution-based and pass the means-test)

### **Child Benefit**

Is normally paid to the mother (unless there is none in the household) and should be shown as her income. Where it is paid into a joint bank account the names of both account holders will be on the benefit order book. This should still be recorded as the mother's income.

### **Child Benefit (Lone Parent)**

(Formerly one-parent benefit) is paid to lone parents those receiving child benefit. It is paid for the eldest child and the amount is detailed in the child benefit payment booklet.

### **Family Credit/ Working Family**

Is paid to families with low earnings and at least one dependent child. Working Family Tax Credit will be introduced in October

<b>Tax Credit</b>	1999. Until spring 2000, this will be paid in the same way as Family Credit rather than through the tax system.
<b>Maternity Allowance</b>	A benefit which applies only to women not eligible for Statutory Maternity Pay. Usually women receiving Maternity Allowance will be either self-employed or will have recently changed jobs.
<b>Housing Benefit</b>	Is benefit paid to help with housing costs, either by the DSS or the Local Authority. Include here only if it is paid direct to the respondent. Where Housing Benefit is either deducted from the rent (council tenants) or paid direct to the landlord, details should be recorded in the Household Questionnaire.
<b>Council Tax Benefit</b>	As with Housing Benefit, Council Tax Benefit is usually credited to the council directly, so the benefit would show on a reduced tax bill. People on income support, however, will claim council tax benefit along with their housing benefit claim form. Obtain amount deducted and period covered. Do not include students who pay a reduced charge. If respondent is unable to give details of benefit received write details of amount he or she <u>actually pays</u> in margin, the amount deducted from the full charge (and the amount of that benefit) can then be calculated.
<b>Other State Benefits</b>	List each separately and record full details. Include such things as Back to Work Bonus, Job Release Allowance and Transitional Payments (but not Transitional Relief for Council Tax payments). Include also Enterprise Allowance and YTS, ET and New Deal Allowances. If any Transitional Payments are received it is important to record which benefit it replaces or tops up. <u>Do not include</u> : Payments from the Social Fund (these are loans) or other one-off payments from either DSS or local authority social services.

### **Showcard 43**

#### **Educational Grants**

Include all grants or scholarships paid in respect of education or training (but not YTS or ET Allowances which should be recorded as Other). Grants and scholarships may be provided by Local Authorities, the DES, Research Councils, charities, prospective employers (e.g. companies or the Armed Forces), educational institutions, family trusts and a number of other bodies such as Trade Unions.

Include here as an Educational Grant any payment from any source (other than from family members) which is intended to cover the living expenses or fees over a period of time of someone in full or part-time education specifically so they may undertake that education.

Grants are often paid in a lump sum at the beginning of a term or quarter to cover that term or a quarter. Check period covered and record the respondent at (b) as receiving the payment for the whole of that period rather than just in the month it was actually handed over. If a grant was paid for a term record that at (d) as Other.

Do not include one-off payments for specific items such as extra travelling expenses, visits or equipment or individual prizes.

#### **Trade Unions/ Friendly Societies**

Include all payments from such bodies here with the exception of Educational Grants and Sickness or Accident Insurance. Include Strike Pay.

#### **Maintenance/ Alimony**

Note that men and non-married women can receive such payments. In most cases such payments come direct but they may also come via a solicitor, a court or the DSS. If it is paid by the DSS, check it has not been included in any Income Support already mentioned.

Code only if the respondent is actually receiving or has received the payment. Do not code if payments should have been made, e.g. through a court order, but have not actually been made. Record actual amounts received rather than what is supposed to be paid.

Payments received for a child should only be recorded if that child is present in the household.

If a respondent receives payment for the support of a child code as respondent's sole income. But if they receive money which

is to be passed on to the child itself exclude from respondent's income.

**Regular payment from family members not living there**

E.g. payment from a spouse working and living away from home, regular payments to parents from children outside the household (but not payments for 'keep' from those living there) and payments from parents to students etc., provided they are not members of the same household. In any cases of doubt the respondent should be asked to decide for him/herself whether or not a payment is to be classed as 'regular'.

**Rent from boarders or lodgers**

Rent from accommodation let at respondent's address. However, do not include payments from boarders or lodgers who are part of the immediate family of the respondent. Do not include payments for keep from family members or rent from property outside the respondent's accommodation. Code the latter as 56.

**Sickness Accident Insurance**

Include any payments to compensate for lost wages during time off work through sickness (but not one-off payments to meet specific expenses such as medical fees or the cost of glasses or false teeth etc.).

**Other Regular Payments**

Specify type of income and source. Exclude any payments from investments, stocks and shares, bonds and other interest payments (e.g. building society and bank savings accounts).

- F14** Exclude money put by to meet regular monthly or quarterly bills (e.g. gas, telephone, electricity etc.) and regular budget payments for utilities but include saving for Christmas or holidays and for yearly expenses such as TV licences.

Include even if saving is irregular.

Include PEP's, Share purchase schemes, Life Insurance, ISAs.

- F15** Record amount saved by respondent alone. If jointly with other household member and no separate amount available then write in details in the margin. Obtain total amount even if held in more than one account or place. Probe for estimation.

- F16** Write in verbatim.

- F17** Include those where employees have opted out of their company pension schemes to set up their own private personal pension. Changes in the law have made it possible from July 1988 onwards for employees to leave company pension schemes as long as one sets up one's own pension scheme. Any money earned from SERPS (State Earnings Retired Pension Scheme) can be transferred to the personal pension.

There are a variety of personal pensions which should be included here. Prior to July 1988, self employed people had what were called 'retirement annuity premiums'. These should be included as being taken out before July 1988. Also prior to July 1988 a few employees could top up their company premiums with what were known as 'freestanding additional voluntary pensions' If you come across this type of pension enter it as being taken out before July 1988.

Exclude 'contracting out' options - As an inducement to invest in a personal pension scheme employees (but not the self employed) are provided this whereby the DSS will contribute towards the employee's own personal pension scheme a sum representing the employer's and the employee's contributions to SERPS plus for a period of years, as a bonus.

- F18** If a respondent has taken out two schemes, one before July 1st 1988 and one since code 3 and skip to F18. We only want details about the scheme taken out since July 1st 1988.

- F19** Do not include payments to charity, repayment of loans to banks or finance companies, or rent to landlords.

Exclude Pocket money for children.

- F33 – F34** Please probe neutrally for as much detail as possible. Record verbatim in full. Please try not to truncate responses.



## **INTERVIEWER OBSERVATIONS**

At the end of the individual questionnaire you are asked to record information about the interview you have just completed.

- I1.**    Other people present during interview? At the end of every section of the questionnaire, you are asked to record if others were present. Please check here if anyone was present during any part of the interview.
- I2.**    If you feel there was any influence on the respondent because others were present, please answer giving your perception of the amount and nature of this influence on the respondent's answers.
- I3.**    Please record in what way the respondent was influenced, describing the situation. If there were any particular questions that were affected, please note them here.