

Understanding Society Innovation Panel Wave 9 Interviewer Materials

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Interviewer Materials

Interviewer instructions

IP9 COA card

IP9 Consents flowchart

IP9 Consent info leaflet economic consent

IP9 Generic Advance Letter

IP9 Info Leaflet

IP9 Interviewer card

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Interviewer instructions

Understanding Society

Innovation Panel 9 Interviewer Instructions

Covering elements that are specific
to IP9

TO BE USED IN CONJUNCTION
WITH CORE INSTRUCTIONS



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1. Instructions specific to IP9

How to use these instructions

Understanding Society is now a well-established study with many of the fieldwork procedures common across several waves including a core panel of dedicated interviewers who have worked on multiple waves. In order to reflect this, the interviewer instructions will consist of a CORE set of generic instructions which are common to all current waves of fieldwork PLUS a separate set of instructions that are SPECIFIC to the wave you are working on. This document covers instructions specific to Innovation Panel Wave 9 (IP9).

Unless described otherwise in these instructions all processes and procedures should follow those outlined in the core instructions (see separate CORE document).

If you are working on multiple waves please ensure you use the correct documents and instructions for each specific wave.

Queries

Please contact your Regional Management Team if you have any queries regarding your assignment and general fieldwork processes. **Your Regional Team should be your FIRST POINT OF CONTACT.**

If you are having technical difficulties please contact the CAPI Helpline on 0800 015 2103.

Sample members can call the TNS Freephone 0800 015 5128 to speak to someone about your visit. This number (printed on the Understanding Society interviewer card) is staffed 9am – 5pm Monday to Friday. Outside these hours, an answer phone service operates. **Interviewers should NOT be calling this number under ANY circumstances**

NB The Freephone number given on the advance letters (0800 252 853) is for the client team at ISER. YOU should NOT be calling this number yourself *under ANY circumstances*.

2. Mixed-mode design

2.1 Mixed-mode design

The fieldwork for IP9 follows a **mixed-mode** design, similar to that used for Wave 8.

All issued households are allocated to one of two sample groups:

1. CAPI-first
2. WEB-first

The CAPI-first group is initially invited to take part face-to-face. The WEB-first group is able to take part online.

It is very likely that your assignment will contain both households from the CAPI-first group and the WEB-first groups. You will need to be aware of which group your households are in. The Sample Information Sheet (SIS) will clearly indicate which group a household is allocated to. More details about these two sample groups can be found in Chapter 3.

2.2 Fieldwork

IP9 fieldwork will run over the summer 2016. Face to face fieldwork begins in early June.

2.3 Who to interview

Please refer to core instructions for more details.

2.4 Electronic Contact Sheet (ECS)

Please refer to core instructions for more details.

2.5 Sample Information Sheet (SIS)

The IP9 SIS contains the following household information:

- Area code
- Serial number
- Final household outcome from IP8
- Mode allocation (CAPI-first or WEB-first)
- Whether stable contact details are available

- Day/time household questionnaire was completed at IP8
- Whether or not we believe the household may have split since they last took part

In addition, the SIS contains the following information about individual household members:

- Screen number
- First name
- Sex
- Age
- Working status
- Final individual outcome from IP8
- Mode of completion from IP8 (CAPI / CATI / CAWI)
- Whether or not they are likely to have moved
- Sample status (OSM / TSM / PSM)
- If there is a reason that individual should not be interviewed
- Incentive type
- Login details for online survey (username and password)

Please refer to core instructions for more details.

2.6 Tracing

Please refer to core instructions for more details.

2.7 The interview process

Please refer to core instructions for more details.

2.8 The CAPI interview

Please refer to core instructions for more details.

The IP9 questionnaire is made up of three parts:

- Household grid;
- Household questionnaire;
- Individual questionnaire.

The main topic areas covered are:

Household questionnaire

- Structural characteristics;
- Tenure;
- Fuel types;
- Consumer durables;
- Expenditure;
- Deprivation;
- Financial investments;
- Household vehicles.

Individual questionnaire:

- Demographics;
- Educational aspirations for young people;
- Family background, ethnicity and religion;
- Attitudes towards immigration;
- Health and disability;
- Personal history and changes in circumstances (partnerships, fertility, education, employment);
- Employment details;
- Parental educational expectations;
- Unearned income, benefits, pensions and household finances;
- Consent to link to Financial Conduct Authority (FCA) records;
- Political position;
- **CASI**: Satisfaction;
- **CASI**: Mobile device use;
- **CASI**: Sexual orientation and attitudes towards immigration;
- **CASI**: Successful ageing;
- Consent to link to employer records;
- Benefit unit finances (see Chapter 5 for more details);
- Contact details and stable contact;
- Interviewer observations.

At one point in the survey, the CAPI script will instruct you to pass the laptop to the respondent to complete a self-completion section (CASI).

In addition, towards the end of the interview, some respondents will be asked the Benefit unit finances section. Please see Chapter 5 for more details.

Please note, there are **no translated scripts for IP9**.

2.9 Youth self-completion booklet

Please refer to core instructions for more details.

At IP9 all children aged 10-15 are eligible for a **green** paper self-completion booklet.

2.10 Queries

Please refer to core instructions for more details.

If in doubt, please contact your Regional Team or the CAPI Helpdesk (0800 015 2103) as appropriate.

3. The IP9 sample

At IP9 you will be revisiting households in the established Innovation Panel sample. This includes both productive and unproductive households from previous waves of the Innovation Panel.

All households have taken part in the study before. Some households have been part of *Understanding Society* since the first wave of the Innovation Panel (IP1). Other households were introduced to the sample at IP4 or IP7.

3.1 Mixed-mode sample design

IP9 has a mixed-mode sample design; the three modes are: **CAPI** (F2F), **CAWI** (WEB) and **CATI** (TEL). Modes will be used to complement and support each other as described below.

3.1.1 WEB-first households

There is an initial four week period of **web-only fieldwork**, during which respondents in WEB-first households are able to complete the survey online. **This is before any IP9 CAPI interviewing starts.**

Respondents receive an advance letter inviting them to take part online. This letter includes their incentive and their unique login details for accessing the survey. Where we have valid email addresses for sample members, they also receive an email inviting them to take part online with a link to the survey.

Towards the end of this period, respondents who have not completed the survey online are sent a reminder email (where we have a valid email address) and a reminder letter. The letter informs respondents that they can still complete online, but that a face-to-face interviewer will be visiting them soon to offer them the chance to take part via CAPI.

Respondents who have not completed the survey online by the end of the web-only fieldwork period are then allocated to CAPI fieldwork and form part of your assignment. You will need to attempt to contact and interview these sample members.

Respondents are still able to complete the survey online after CAPI fieldwork starts. If they wish to do so, you can help them by making sure they have their login details and know how to access the survey. You should also follow up these cases to make sure they do complete the survey.

You will need to follow these and all addresses in your assignment until a final outcome is coded.

3.1.2 CAPI-first households

CAPI-first households are included in your assignment. They are sent an advance letter shortly before the beginning of CAPI fieldwork, informing them that an interviewer will be calling soon. This letter includes their incentive.

If any respondents in this group express a preference to complete their interview online before the re-issue stage you can facilitate this by giving the web address and their login details from the SIS. **You will need to follow these and all addresses in your assignment until a final outcome is coded.**

If CAPI-first households reach the re-issue stage they will be invited to participate online. Towards the end of fieldwork we will conduct a mop-up stage where you will attempt to contact the non-responding members of these households by telephone.

3.2 Your assignment

You are responsible for managing and monitoring progress for **all individuals in all households** in your assignment through to allocation of a final outcome. This includes both CAPI-first and WEB-first households.

Please note that your WEB-first households in your assignment may be:

- Whole households – where no online interviews have been completed
- Partial households – where some but not all adults have completed their interview

- Partial adult interviews – where someone has started but not finished their interview online. For these the CAPI interview will start at the next question to be answered.

If a WEB-first household is fully complete before face –to-face fieldwork starts (i.e. if the HH grid/HH questionnaire are completed and all eligible adults have already completed their interview), this household will not appear in your eReps grid. This is because there is no further work for you to do with this household.

3.3 Keeping track of CAWI completions

To identify the status of WEB-first households in your assignment you will need to access **the ‘status summary’ screen at Screen 0**. Screen 0 will show the status of all individuals in the household (e.g., whether not yet started, complete or partially complete). When you return to the eRep grid from the ECS, outcomes will be updated for any newly completed cases. Outcomes for both CAWI and CAPI individuals will be shown.

Please note you will only be able to see the outcomes in the ereps grid once you have gone into Screen 0 and then refreshed the grid.

It is vital that before setting out to interview any WEB respondents you check the ‘summary ‘status’ screen in Screen 0 for any updates. Because the CAWI option remains available throughout the fieldwork period participants in the Web sample may complete their survey at any point during that time. It is equally important that you send your ECS information back to us electronically **at the end of each working day.**

If you call at a household where you believe there are interviews outstanding yet the respondent(s) say they have completed in CAWI you should contact your Regional Team (after checking the status summary screen).

3.4 Mop-up period

At the end of the CAPI fieldwork stage, all individuals who do not yet have a final outcome will be sent a letter and email (where we have an email address) inviting them to take part online. You should be aware that the period for the web reopening overlaps with CAPI reissues and the CATI

mop-up stage, so it is possible at that time that you may contact some respondents who have been invited to take part online. You will be told when the mop-up period starts for this group and before any further contact with these respondents you should check the status summary screen.

3.5 The CAWI survey

Occasionally, you may be required to assist respondents in accessing the CAWI survey. The web address to log in to the survey is:

www.understandingsociety.ac.uk/society

Each individual sample member has their own username and password. You can find these on the SIS and in AddInfo. Respondents in WEB-first households will have also been sent their username and password in their advance letter.

The login page is shown below. Respondents enter their username and password, then click the 'Next' button (>) to continue

If you are unsure how to guide the respondents on technical issues they may raise, please get in touch with the Helpline. The respondent helpline number and email address are shown on every screen in the survey.

Please log in to begin

Thank you for taking part in the web survey for Understanding Society. Each member of your household will have received a username and password in the letter we sent. Please enter your username and password into the boxes below and click > to proceed.

Username

Password

Got a question?
Call: 0800 015 2908
help.understandingsociety@tns-bmrb.co.uk

FAQs >

Find out more >

Contact Understanding Society

3.6 Viewing the status summary screen

Please refer to your core instructions for details and screenshots.

3.7 Summary of your responsibilities

Throughout your fieldwork assignment you will be responsible for:

3.7.1 CAPI-first sample:

- Contacting households and individuals and conducting CAPI interviews;
- Enabling CAWI where this is a stated preference, by giving individuals their CAWI username and password and providing support and making reminder phone calls to individuals who are planning to complete in CAWI but have yet to do so;
- Conducting CATI mop-up interviews in the final 2 weeks;
- Monitoring making reminder phone calls to individuals who are planning to complete in CAWI but have yet to do so during the mop-up period.

3.7.2 WEB-first sample:

- Monitoring and following up CAWI completions in your assignments by viewing the 'status summary' screen by accessing Screen 0. You will not need to conduct interviews with individuals or households that have completed their CAWI interviews online but will need to follow up those who say they intend to complete online;
- Contacting households and individuals and conducting CAPI interviews with those members of the WEB-first sample who haven't completed their interviews online;
- Picking up and completing any interviews that have been started in CAWI but are incomplete;
- Reminding WEB-first sample members that they can complete their interview in CAWI (until the end of the fieldwork period);
- Enabling CAWI where this is a stated preference, by reminding individuals of their CAWI username and password and providing support;
- Making reminder phone calls to individuals who are planning to complete in CAWI but have yet to do so;
- Conducting CATI mop-up interviews in the final 2 weeks.

3.8 Notifying the police

Please refer to core instructions for more details.

4. Experiments

A key feature of the Innovation Panel is experimentation. The study is designed to improve the way that social surveys are run and the quality of data collected. It does this by incorporating into its design some experimental variation between different groups of participants. Analysing the data from the interviews with these different groups will allow us to assess the effect and relative merits of the different approaches. A number of the experiments are continuing from previous waves to allow longitudinal assessment of effects.

The allocation into experimental groups is generally done at the household level. That is, all eligible adults in a household will receive the same treatment for any given experiment. This also includes any new entrants or re-joiners to issued households. Similarly, respondents in split households will be allocated to the same treatment groups as those in the originating household.

4.1 Procedural experiments

IP9 includes a number of experiments which will help us improve our understanding of how different survey processes and contact methods can improve our ways of getting – and keeping – in touch with participants, collecting self-completion data and securing participant co-operation. These experiments are described below.

4.1.1 Mixed modes experiment

This experiment has been ongoing since IP5 and involves offering and encouraging a proportion of the households the possibility of completing the questionnaire online before F2F fieldwork commences. The rest of the sample will be approached F2F in the first instance. This will allow estimating of the take-up of the WEB instrument and the impact of this mode on response rates and costs of the survey. Chapter 3 covers the practicalities of this experiment in more detail.

4.1.2 Incentives experiment

The IP9 incentives experiment has been running since IP1. The experiment assesses the impact of incentives on response rates, efficiency of fieldwork and costs. Incentives, in the form of a Love2Shop

High Street gift card, are sent in the advance mailing and are given per adult rather than per household. For existing sample members, an advance letter is sent to every adult in the household containing their individual incentive.

For new entrants to the survey, if the household grid is completed face-to-face then the interviewer gives the new entrant their incentive upon completion of the interview. If the household grid is completed online, the new entrant's incentive is mailed to them. In both cases, the incentive amount is the same as given to other members of the household.

For IP9, CAPI-first sample members who were part of the original sample at IP1 or who were introduced at IP4 will all receive £10. Households first introduced to the sample at IP7 are divided into three roughly equal groups receiving £10, £20 or £30 – they will receive the same amount as given at IP7.

The remaining WEB-first sample members are also divided into three roughly equal groups. Two groups will receive £10 and £30 respectively. The third group will receive £10, plus an additional £20 each if everyone in the household participates online by a specified date.

4.2 Questionnaire experiments

Some of the IP9 questionnaire content is also experimental in design; essentially we are trying out different ways of asking the questions. As an interviewer you should simply follow the CAPI interview which automatically routes you (or the participant in the CASI section) to the correct questions, but it may be useful to be aware of the experiments and the rationale behind them.

Some experiments test how question wording affects measurements, to find out which approach yields the most accurate/complete/reliable answers. The different versions of wording are allocated across the sample and interviews and, in order to ensure the experimental design is followed as intended, it is very important to follow the best practice procedures on **standardised interviewing** covered in basic training. These are:

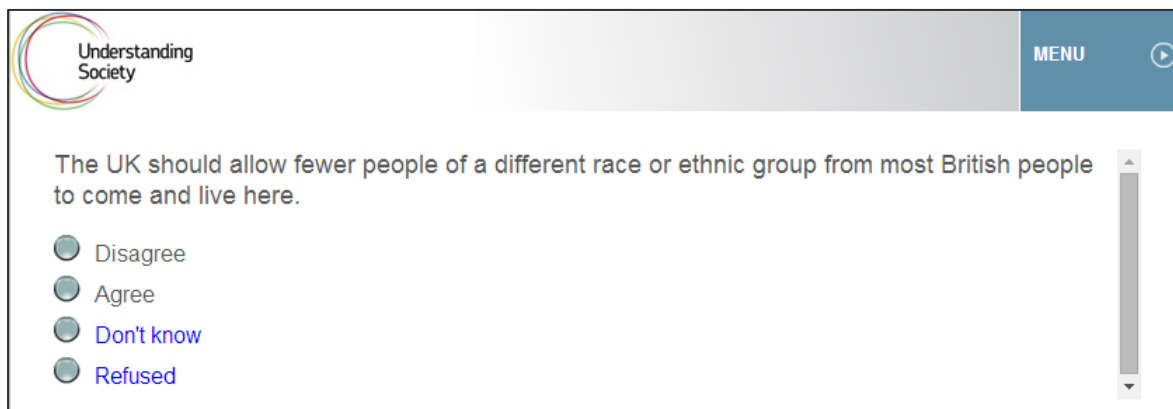
- you must read the questions from the CAPI screen carefully and **exactly as scripted**;

- use only **neutral probes** to identify the intended response option;
- say “whatever it means to you?” or repeat the question where the respondent is unsure about question meaning, words in the question etc.;
- retain a **professional rapport** at all times.

The following sections give a brief overview of each questionnaire experiment included in IP9.

4.2.1 Exploring systematic measurement error (MTMM)

This experiment looks at respondent opinions towards immigration. A set of 6 questions that differ slightly in wording are asked at two points in the questionnaire, one towards the beginning, the second towards the end (example shown below). Importantly, for the second set of questions to appear at least five minutes must have passed since the first set were asked. It may be that in a small number of cases there will be less than five minutes between the two sets of questions and in these cases the second set of questions will not appear. For the majority of cases, however, the set of questions will appear twice.



Understanding Society

MENU

The UK should allow fewer people of a different race or ethnic group from most British people to come and live here.

☐ Disagree
☐ Agree
☒ Don't know
☐ Refused

4.2.2 Comparing different ways of measuring sexual identity

In this experiment, different respondents get asked different questions about sexual identity. The wording and structure of the questions are different, and the questions also come at different points in the questionnaire.

The intention is to compare the different approaches to asking respondents about their sexual orientation from other surveys as well as getting a more accurate measurement of sexual identity overall.

One of the techniques used in this experiment is an Item Count question design; this involves showing respondents a list of three to five statements and asking how many apply to them or how many they agree with. Respondents do not need to identify which statements they agree with, only answer how many apply. An example of one of these questions is given below.

Example of item count technique

I have at least once been sexually attracted to someone who ...

- is fit and muscular
- has a disability
- is ten or more years older than me
- grew up with me in my local area

How many statements are true for you?

- ☐ None are true
- ☐ One statement
- ☐ Two statements
- ☐ Three statements
- ☐ Four statements

4.2.3 Exploring different attitudes towards immigration

This is a different experiment to the investigation of systematic measurement error, described in Section 4.2.1. Attitudes towards immigration are often inaccurately reported in surveys due to a tendency for some respondents to give the answers they believe are most socially acceptable as opposed to the answers they believe are closest to their own beliefs. This may lead to opposition to immigration being under-reported.

This experiment tests different questions about immigration. In particular, it uses questions which are designed to minimise the pressure on respondents to give the answer they think is most socially acceptable. This experiment also makes use of the Item Count technique, described above (Section 4.2.3).

4.2.4 Understanding educational expectations and beliefs

about the earning potential of graduates

Continuing on from an experiment at IP8 a series of questions are asked to try to understand the attitudes of young adults and their parents towards going to university and their beliefs about the earning potential graduates have as compared to people without a degree.

These questions will only be asked of those respondents who answered them in the previous wave. They will be asked about their perceptions of the financial costs and benefits of going to university; depending on the respondent's situation, they may be asked to think about themselves, their children or graduates in general.

Between IP8 and IP9, half of households received information about earnings of men and women with and without a degree. They were also given this information during the IP8 interview. This experiment will examine how providing this information to respondents affects the answers given at IP9.

4.2.5 What do the general population regard as 'successful ageing'?

In a new experiment for this wave, respondents are asked to consider three scenarios involving elderly individuals. For each scenario, the respondent will be presented with six pieces of information and asked to consider whether they feel the individual is aging successfully.

The six pieces of information are:

- Illness (either has no long-term illness or has diabetes);
- Physical impairment (has no difficulties climbing stairs / difficulties climbing stairs);
- Cognitive ability (has no problems remembering / problems remembering);
- Physical ability (opens food packaging easily / struggles to open food packaging);
- Socialisation (sees friends and family regularly / sees friends and family rarely);
- Volunteering (often volunteers / doesn't volunteer).

These six pieces of information will vary in each scenario. This will allow researchers to explore attitudes about the relative importance of different dimensions of ageing.

These questions are asked as part of the self-completion (CASI) section.

4.2.6 Presenting health satisfaction questions to respondents

In this experiment, questions about health satisfaction are presented in three different formats:

- All health satisfaction items on one page, with response options on the top and items on the left in a grid format;
- Each item presented on a different page with response options displayed vertically;
- Each item presented on a different page with response options displayed horizontally.

A third of households are assigned to each treatment. These questions are asked in the self-completion (CASI) section.

The intention is to see whether or not a change in the overall pattern of answering health satisfaction questions in the main survey is a result of change in the design of the survey.

4.2.7 Measuring household finances

This wave sees the introduction of two new modules designed to try and overcome some of the issues with the reporting of household income and expenditure.

The first is the **finance summary** module. This will be asked to respondents in half of households. The finance summary displays income sources reported by the respondent during the interview. An example is shown on the next page.

Respondents are asked if this summary is accurate. If not, they are then given the opportunity to amend or correct the amounts shown.

The benefit unit finances module is asked towards the end of the interview. This module seeks to reconcile any differences or discrepancies

in the reporting of income and expenditure. Further details are given in the following chapter (Chapter 5).

Example of the Finance summary

Thank you for telling us about these types of income. Here is a summary of what you have told us you received last month after tax and deductions. Please take a look and select, whether this summary is accurate. If not, you will have an opportunity to update the amounts in the boxes.

Employment income: Main job	£	250	per	week	= about £	1083	per month
Employment income: Second job	£	150	per	month			
Income from self-employment	£		per	month			
Benefit and Pensions							
NI Retirement/State Retirement (Old Age) Pension	£	676	per	month			
Pension Credit (includes Guarantee Credit & Saving Credit)	£	150	per	month			
Disability Living Allowance	£	238	per	month			
Total:	About £	2297	per	month			

Does this summary seem correct?

☐ Yes

☐ No

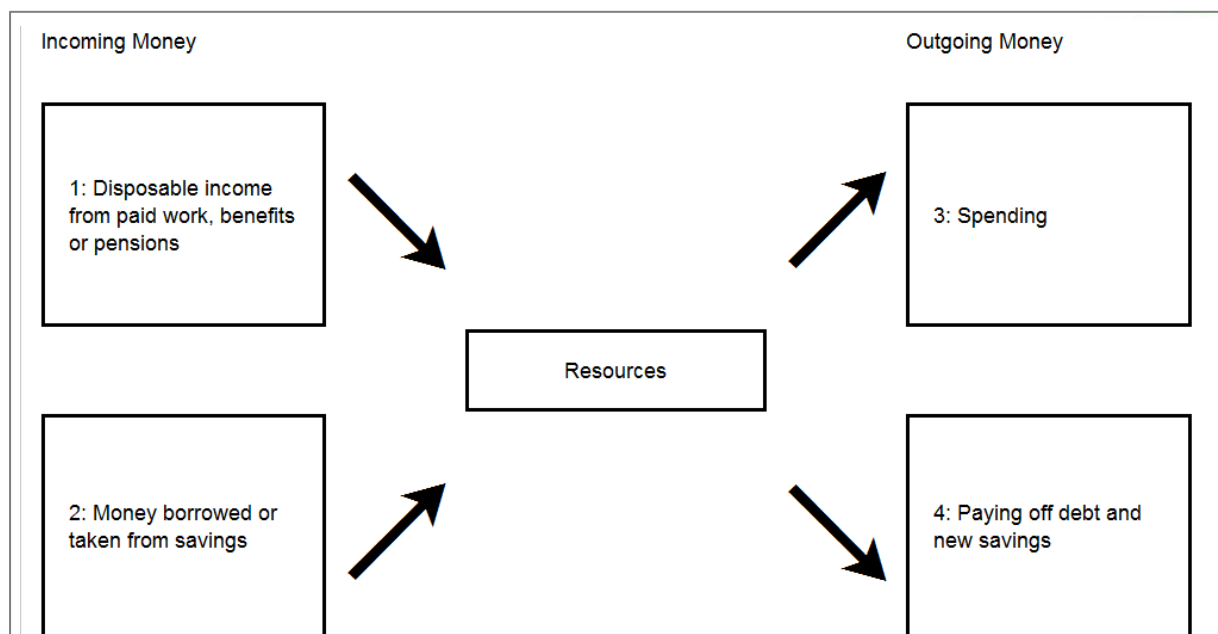
5. Benefit unit finances

5.1 Background

The purpose of the benefit unit finances experiment is to test a new way of collecting financial information. There are known inaccuracies in the conventional reporting of financial information in surveys, including:

- Under-reporting of income
- Over-reporting of expenditure
- Difficulties in measuring the role of savings and debt

The underlying principle of the benefit unit finances section is that incoming finances should be balanced by outgoing finances – in other words, that individuals have a certain amount of money available to them (through disposable income, withdrawals from savings or taking on new debt) and that this money will then be used in some way (i.e. spending, new savings, paying off existing debt). This is summarised in the diagram below.



In the benefit unit finances module, respondents will be asked about their income, spending, savings and debts. They will then be shown a summary of their answers and given an opportunity to reconcile any differences and discrepancies.

5.2 What is a benefit unit?

Once the household grid is completed respondents are automatically placed into groups, known as benefit units. A benefit unit consists of:

- An individual;
- Their spouse or partner if they live with one;
- Any dependent children living with them (dependent children are those aged under 16 and those aged 16-19 who are in full-time education)

There will often be more than one benefit unit in a household. For example, a household made up of a married couple living with an elderly parent would have two benefit units:

- The married couple would be one benefit unit (along with any dependent children living with them)
- The elderly parent would be another benefit unit

5.3 Who is asked the benefit unit finances module?

The benefit unit finances module is asked towards the end of the individual adult questionnaire.

Where a respondent is living with a spouse or partner, these questions would ideally be **asked to both individuals together**. In this case, both respondents would be asked for their permission to share the income amounts reported in their individual interviews with their spouse / partner. If both respondents give their permission, the benefit unit questions will be asked towards the end of the **second person's** interview. If one or both respondents do not give permission, these questions will not be asked.

Please note, the benefit unit finances questions will not be asked to respondents who are classified as dependent children i.e. those aged 16-19 who are in full-time education and living with their parent(s).

5.4 Interviewing married and cohabiting couples

Where respondents are living with a spouse or partner, we realise that it will not always be possible or practical to ask these questions to both sample members together. In some cases, only one of the sample members will complete an interview. In other cases, it may be difficult to

arrange an appointment where both respondents can be present.

Although it is preferred that both respondents in a couple answer these questions together, this is not essential.

You are not expected to be making additional visits in order to interview both members of a couple together. During the interview, you will be asked to code which of the couple is answering these questions (one person, or both). Please do so accurately. This will enable us to see where couples answered the questions together and where these were answered by just one respondent.

5.5 Content of the benefit unit finances module

The module takes information provided earlier in the individual interview(s) about income from employment, self-employment, second jobs / odd jobs, benefits, pensions and other income sources. A summary of this information from the individual interview is shown to the respondent(s) and they are asked whether or not this accurately reflects their income. At this point, respondents are able to make adjustments or corrections.

Respondents are then asked about expenditure, savings and debt. Finally, these amounts are all put together and respondents are again able to make adjustments or corrections or reconcile any differences between incoming amounts and outgoing amounts. An example is shown on the next page.

There are two different versions of the benefit unit finance questions:

- Gross income flows: Respondents are asked about the **total amounts** of income, expenditure, withdrawals of savings / new debt, new savings / paying off debt;
- Net income flows: Respondents are asked to consider income, expenditure and the **changes** in savings / debt.

Households have been randomly allocated to receive one of these two versions.

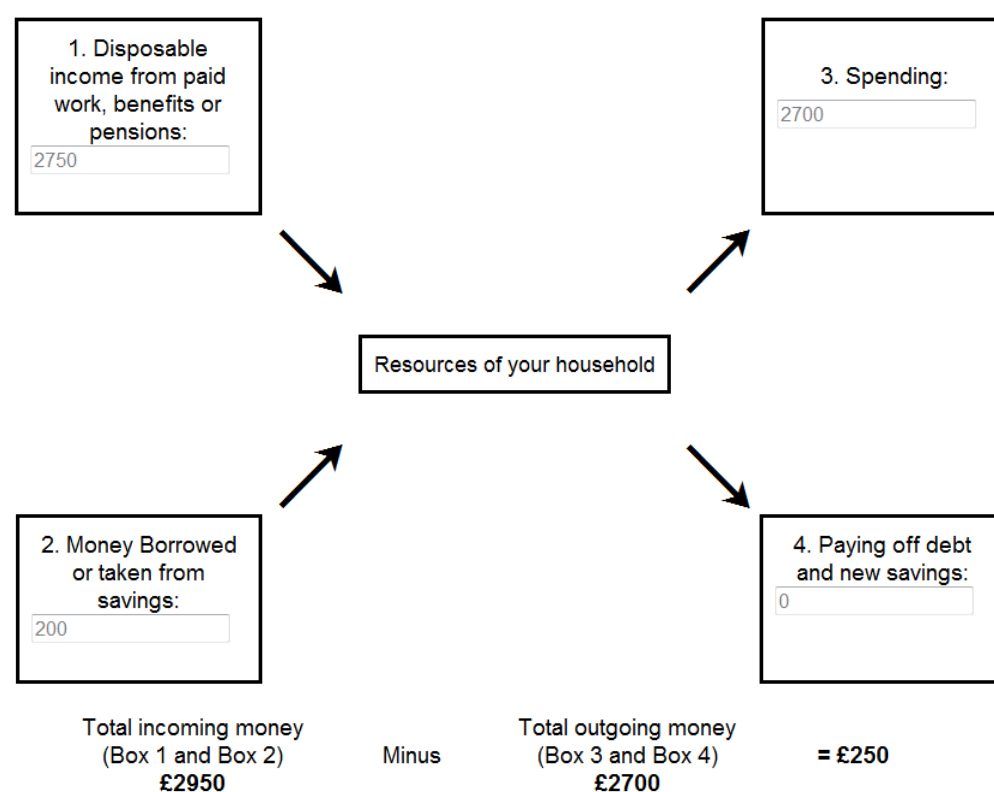
It is important that you complete practice interviews so that you are familiar with these questions.

Example of the benefit unit finances summary screen

Thank you. To finish we'll show you a summary of what you have told us about your household finances. Looking at the boxes on this screen, the incoming money in boxes 1 and 2 should match the outgoing money in boxes 3 and 4.

The information you've told us indicates that you have around £2950 coming in and £2700 going out of your household. That is, you have £250 more coming in than you have going out. This means that our questions must have missed some of your income, spending, savings or borrowing.

Please could you amend the amounts you have coming in or going out in the boxes. When you have finished, please press >.



If you have made any changes, these figures will be updated when you click >

5.6 Audio recording

This part of the questionnaire will be audio recorded, assuming the respondent gives permission. This will allow us to assess how respondents react to these questions and how they go about answering them.

Permission for recording is asked near the beginning of the survey. You do not need to do anything to set up the recording as the microphone is built into your CAPI laptop and the script will automatically set it to record

at the right point of the questionnaire. If the respondent does not give permission, no part of the interview will be recorded.

However, you will need to electronically return the recorded audio files. To do this:

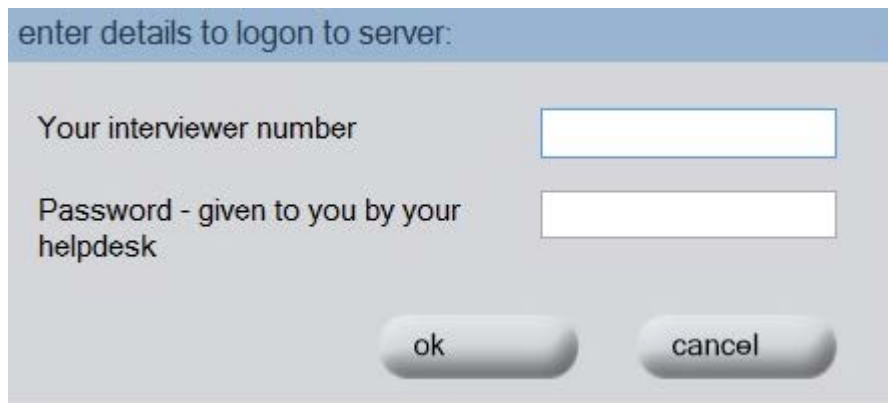
- Make sure the CAPI machine is connected to the internet via WIFI or a LAN cable;
- On the CAPI main screen, click on the **Check Update** button;
- On the pop-up screen enter your interviewer ID and password to access the Interviewer Portal;
- Click on the option: **Run USoc sound file transfer**;
- You will then be asked if you want to run or save this file. **Click on run.**

Screenshots for this process are shown below. If you have any questions about this process or encounter any technical difficulties, please contact the CAPI Helpline on 0800 015 2103.

1. CHECK UPDATE button



2. Enter interviewer ID and password



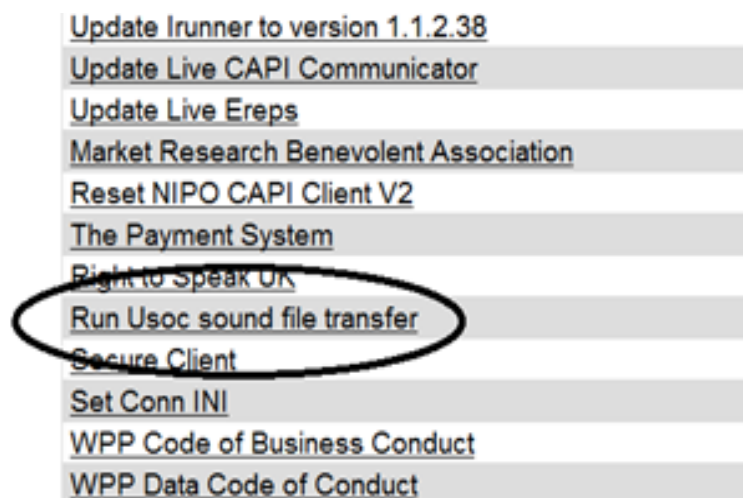
enter details to login to server:

Your interviewer number

Password - given to you by your helpdesk

ok cancel

3. Choose RUN USOC SOUND FILE TRANSFER



4. Click RUN



5. The transfer process will begin



6. Between-wave contact

Please refer to core instructions for more details.

7. Advance mailings

7.1 Continuing sample members

Advance letters are sent to all sample members eligible to take part in the survey this year. Advance letters include the respondent's incentive (£10, £20 or £30). For sample members in WEB-first households, the advance letter also includes their unique username and password, as well as instructions for logging in to the CAWI survey.

In your workpack, you will receive a generic advance letter which you can use on the doorstep, for example, with new household members or those who say they did not receive an advance letter.

Please refer to core instructions for further details on advance mailings.

7.2 New entrants

For WEB-first respondents, where a new entrant is identified by a household grid that is completed online, the office will send out an advance letter containing their login details.

If you identify a new entrant by completing a household grid face to face, please go ahead and conduct the interview in CAPI. If the new entrant insists they would prefer to complete the interview online you can provide them with a username and password from the AddInfo. You will need to have completed the Household Grid and synchronised first. In these cases there will generally be a delay of one working day before the new entrant is able to log in, so it may be advantageous to encourage a CAPI interview.

An example of the advance letter is shown on the next page.

IP9 Advance letter example

 Dear Sir/Madam A chance to influence decision making. I would like to enlist your help. The Understanding Society survey helps researchers and policy makers understand the changes in the needs of the country. By taking part, you'll be helping to influence the decisions made by everyone from government ministers to local councillors. An interviewer will soon be in touch with you to arrange a convenient time to talk to you. The interview will last between 40 minutes and an hour, depending on your circumstances. On the day, the interviewer will be carrying photographic identification. Your participation is entirely voluntary, but we do hope you'll be able to help. By taking part, your voice is heard. If you have any questions, please call us on 0800 015 0655 or contact us at understandingsociety@rns-bmrb.co.uk. With many thanks  Professor Michaela Benzval Director, Understanding Society Institute for Social and Economic Research University of Essex We need your help We'll arrange a time Complete the survey Find out more Contact us: Participant helpline (Colette): 0800 252 853 Web: understandingsociety.ac.uk Email: contact@understandingsociety.ac.uk You can also follow us on Twitter @usociety. ©131809 / Letter 137 / General	Why are you important to us? You make the survey more complete and useful. Without you, the study is less complete. You have been specially selected to help us make sure that Understanding Society accurately represents experiences of all types of people. This way, we can see how factors such as the economy or housing affect lives across the whole of the UK. Your participation is crucial to the success of the study, its value to researchers and accuracy of their research findings. If we lose you, we can't replace you. What is the study about? Understanding Society is a long-term study that helps us find out about the issues that matter to everyone. How is the recession affecting you? Are you happy with your local services and facilities? Are your health care requirements being met? The information we collect is used by academics and researchers to inform policy debates on issues that matter to you. Why do you interview young people? Young people's opinions matter to us, too. If there are young people aged 10-15 in your household, we hope that they can complete their part of the survey. We'll ask them about their hobbies, friends, school life and hopes for the future. Each child that takes part will receive a £5 voucher.
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7.3 Advance emails

For the WEB-first sample members where email addresses are available we also send **tailored emails**. These contain a unique link that takes them straight into the questionnaire. This is an important advantage over typing in the Web address and then the username and password. It is another reason why it is **very important to prompt for email addresses and ensure that they are recorded correctly during the interview**.

An example of the email text is below:

We can't do without you, <NAME>.

I would like to ask you again if I can enlist your help. The Understanding Society helps track changes in our lives and needs. By taking part, you'll be helping to influence decisions at a local and national level on issues that matter to you.

You can complete this year's survey online. Just click [here](#).

<Click to Start the Survey>

To say thank you for your help, if you are able to take part this year, we will send you a £10 voucher.

Your participation is entirely voluntary, but we do hope you'll be able to help. We rely on the contribution you make. If you have any questions, please [email Colette](#). You can also find out more about the survey [here](#).

Many thanks,

*Professor Michaela Benzeval
Director, Understanding Society
Institute for Social and Economic Research
University of Essex*

7.4 Additional items in the mailing

In addition to a letter, the advance mailing will include the following items:

- Incentive (£10, £20 or £30 gift card);
- Personalised Change of Address (COA) card (see core instructions);
- Freepost return envelope.

7.5 Reminder emails

Respondents in the WEB-first group will be sent up to two reminder emails periodically throughout the fieldwork period.

The reminder email reads as follows:

<NAME>, your help is still needed.

You may remember I emailed you recently asking for your help in this year's Understanding Society survey. There's still time to take part, and by doing so you can help influence decisions at a local and national level on issues that really matter to you. We hope you can take part this year. If you have already completed the survey then please ignore this message.

You can complete the survey online by clicking [<here>](#).

<Click to Start the Survey>

*Many thanks,
Professor Michaela Benzeval
Director, Understanding Society
Institute for Social and Economic Research
University of Essex*

8. IP9 Incentives

For general information about administration of incentives please refer to core instructions.

8.1 Incentive amounts

Not all sample members at IP9 receive the same incentive amount. See Section 4.1.2 for more details on the Incentives experiment.

All members of a household are allocated to the same incentive group. That means that all members of a household should receive the same incentive amount. This includes rejoiners, new entrants and split-off households.

8.2 When to issue incentives

The majority of adult participants will receive their incentive as part of their advance mailing. For others you will be required to hand out the incentive and will be provided with a supply of gift cards as part of your fieldwork kit. Those who you will need to provide gift cards to include:

- **New entrants/re-joiners** will not have received an incentive in the advance mailing and you will be required to issue a £10, £20 or £30 gift card (depending on the household's incentive group). You will be prompted to hand out the incentive at the end of the CAPI script – this will also tell you the value of the incentive. Everyone in a household is in the same incentive group. Please note that incentives for new-entrants are always conditional so are only to be issued where they have completed an interview.
- **10-15 year olds** should be issued a £5 gift card when you give them the youth paper self-completion questionnaire.

In addition there may be some respondents who should have received an incentive in their advance mailing who say they did not receive it. In these cases you will need to code at the end of the interview that they did not receive their letter and you should then issue them a gift card.

Please make sure that you accurately enter the gift card code into the CAPI script when prompted.

9. Contacting the household

General information about call patterns and contacting households is in core instructions.

10. Introducing the study

Please refer to core instructions for more details.

For some frequently asked questions and answers, please consult the '*Understanding Society: Information for Participants*' leaflet and also refer to the 'Introduction' of these instructions for the background information on the study.

10.1 Maximising response in a mixed mode sample

Please refer to your core instructions for more details.

10.2 Doorstep documents

Please refer to core instructions for more details.

11. Who to interview

11.1 Eligible adults aged 16+

The CAPI script determines the eligibility of individuals once you have completed the Household Grid. Generally, you will be interviewing **everyone aged 16+ who is part of the household**; regardless of whether or not they have been interviewed previously i.e., they could be a new entrant to the household or a re-joiner.

Please refer to core instructions for more details.

11.2 Children aged 10-15

You will also give out **green** paper self-completion booklets to young people (aged 10-15).

Please refer to core instructions for more details.

For web interviews, a self-completion questionnaire will be posted out from the office for any eligible young people, once the household grid has been completed. Therefore, if you are visiting any partially complete web households, you may find that the youth questionnaire has already been received. Please carry spares just in case.

11.3 Other eligible adults

Please refer to core instructions for more details.

11.4 Who not to interview

Please refer to core instructions for more details.

11.5 Eligibility of new entrants to the household

Please refer to core instructions for more details.

11.6 Absent household members

Please refer to core instructions for more details.

11.7 Non-resident household members

Please refer to core instructions for more details.

12. Movers and split households

You may find that, since the previous wave, some households have moved, and some households have split, i.e., not everyone in the household from the last wave lives together any longer.

Possible scenarios, and how to deal with them are in core instructions.

13. The Electronic Contact Sheet (ECS)

13.1 Introduction to the Electronic Contact Sheet

Please refer to core instructions for more details.

It is important that you record **every** contact made with an address on the ECS.

The information you record on the ECS needs to be sent back to us electronically **at the end of each working day**. You should also send back any audio files from completed interviews (see Section 5.6 for further details).

The addresses in your assignment are listed on the eReps grid.

To enter call details for an address you should click on the address line and press the 'Start Screener/Int' button. **You should always start the interview via screen 0 to complete the household grid before doing anything else.** If you receive a new telephone number in screen 0 (q14 as part of ECS), this will now be displayed in eReps. It can be found in additional info> newaddress2_Telephone for the individual concerned.

The household grid, household questionnaire and status summary screen are on screen 0.

Individual interviews are completed on screen 1 onwards (one screen per individual) with potential re-joiners appearing on screens 17 onwards.

13.2 Final outcome codes – main adult interview

Please refer to core instructions for more details.

Remember you must report a Final Outcome Code for each of the addresses that have been issued to you – whether or not you have actually achieved an interview.

A Final Outcome Code should only be completed after you have made ALL your calls at an address.

If you obtain an interview at the sample address the ECS should automatically populate a full/partial interview outcome in the eReps grid.

13.3 Interim codes

Please refer to core instructions for more details.

Every call at an address must be recorded with either an interim or a final outcome code depending on which is appropriate. **If an individual/household intends to complete online, this is an interim outcome. Please follow up such cases until a final outcome is recorded.**

A full list of outcome codes is given in Chapter 22 below.

13.4 Observations at issued address

Please refer to core instructions for more details.

All questions in this section should be answered **before** making contact with the address and **not** changed once completed.

Observation questions need to be completed for all non-deadwood addresses including office refusals, although you should not contact the latter.

If you are issued a partial CAWI household where some household members have completed online and others haven't, you will still need to complete the observation questions.

14. Sample Information Sheet (SIS)

Please refer to core instructions for more details.

A Sample Information Sheet has been provided to you which contains extra information that may prove helpful when contacting the household and planning the interview. You have been given one SIS for each address in your issued sample.

The SIS is based on the information from the sample member's last interview. However, as circumstances change, this information may be out of date by the time the case is issued to you.

You will receive one SIS for all households in your assignment including all web-first households. If these households subsequently complete the survey online in the first four weeks of fieldwork you will not need to contact them and therefore you can simply destroy the SIS for these households.

The SIS is for your own use only; it should not be shown to the respondents or anyone else. If you choose to write any additional confidential information about respondents on to the SIS, please ensure you take great care with it.

Once you have fully completed your assignment, the SIS should be **confidentially** destroyed.

15. Tracing sample members

It's vital that we re-contact and interview as many sample members as possible. We will follow any sample member who has moved except those who:

- Have left the UK (they may be eligible at a later date if they return);
- Are in prison;
- TSM only households.

We will also attempt to locate untraced movers from Wave 7.

Please refer to core instructions for more details.

You are expected to make reasonable attempts to contact and / or trace the sample members; this may require more than one visit.

In general, if the household has moved to a new address within 15 miles of the original address, or is closer than that address to your own home you should attempt the interview at the new address (and be prepared to follow up further moves). You should check this with your Field co-ordinator if you are unsure.

15.1 Tracing activities

Please refer to core instructions for more details.

15.2 Institutions

Sample members who have moved into an institution remain eligible for interview at their new institutional address.

Please refer to core instructions for more details.

15.3 Split-off households

Please refer to core instructions for more details.

Suspected split-offs will be included in the original IP9 household (rather than being put in a separate household) and this will be indicated on Sample Information Sheet (SIS) under the 'Suspected split-off mover?' heading.

For suspected split households, you MUST visit the original household first and confirm that the sample member is no longer resident at the address.

15.4 Incomplete addresses

Please refer to core instructions for more details.

15.5 Movers/traced cases outside your fieldwork area

Please refer to core instructions for more details.

15.6 Unsuccessful Tracing

Please refer to core instructions for more details.

16. The interview process

16.1 Overview of data collection instruments

Please refer to core instructions for more details.

16.2 Planning your work/tracking progress

If you have a large household you are very likely to have to make multiple trips to complete all interviews and to collect youth self-completions.

16.3 Proxy interviews

Please refer to core instructions for more details.

16.4 Recording contact details

It is hugely important that we obtain and maintain as much contact information as possible about the respondents. One of the biggest challenges for longitudinal studies is finding people who have moved since their last interview. The more information we can collect about how to contact them at this interview, the better chance we have of finding them in the future.

Please refer to core instructions for more details.

16.5 Collecting details about respondents' occupations

The job description the sample member gave at the previous interview will be fed forward. Please confirm whether it is still correct and amend if it has changed. For new entrants to the household you will be required to record their job description as described below.

For *Understanding Society* there is a requirement to code the Standard Industrial Classification (SIC) to 4 digits rather than to the standard 2. To code to 4 digits, the Operations team needs more detailed information.

Please refer to core instructions for more details.

16.6 Adult CASI

Adults will be asked to complete a CASI interview during their CAPI.

Please refer to core instructions for more details.

16.7 Youth self-completions

Paper self-completions are only administered to young people (aged 10-15). The questionnaire is an A5 booklet with a **green** cover. Please make sure you are using the right one, it should have **IP9** in the bottom right hand corner.

Please refer to core instructions for more details.

Incentive

There is an **unconditional** incentive of a £5 gift card for young people to complete the self-completion.

Please do make every effort to collect the self-completions in person, either when you return to the household to complete other appointments or if you are in the area.

16.8 Consent for linking to administrative records

At IP9, we are asking for the following consents for linking to administrative records:

- Consent to link to information on energy use and efficiency held by the Department of Energy and Climate Change (DECC). DECC have this information for each address in the country. This consent question appears in the Household interview.
- Consent to link to data from credit files. This data linking is done through the Financial Conduct Authority (FCA). This data includes details of borrowing and repayments, and estimates of income.
- Consent to link to records held by the Department for Work and Pensions (DWP). These records include details of benefit claims and time on employment programmes.
- Consent to link to publicly held information about place of employment. Local councils hold publicly available information about employers and places of employment. We need to record the company name and address to link survey responses to this information.

The mixed mode approach means that signed consent is no longer required and you now only need to code in the CAPI script whether or not the respondent has consented to the linkage.

The CAPI script will prompt you if you need to ask for consents.

For the consent to link to records held by DWP, the CAPI script will prompt you to give the respondent an economic consent information leaflet to read before giving consent (called 'Information on adding economic records'). **Please ensure that you give the correct leaflet.** For IP9, the leaflet is the same as used on Wave 7, but **not** the same as used on Wave 8.

In addition there is a privacy notice which should be handed to all respondents who agree to consent. This is for them to keep.

Please refer to core instructions for more details.

16.9 Change of address (COA) cards

Please refer to core instructions for more details.

17. CAPI interview

There are several components to the CAPI questionnaire, which are covered in detail in core instructions.

17.1 Household Grid and questionnaire

Please refer to core instructions for more details.

17.2 Feed forward information

Please refer to core instructions for more details.

17.3 Individual CAPI interviews

Please refer to core instructions for more details.

Some of the topic areas will only be asked of certain people such as those new to the household, re-joiners or those who have never been

interviewed before. Chapter 23 lists all the questionnaire modules and the conditions under which they are asked.

It is important to note that some of the topic areas covered in CAPI are sensitive and should be treated accordingly. The areas that some sample members might find particularly sensitive are fertility (including pregnancy and child birth history questions), previous relationships, financial questions (such as savings and investments) and benefits. For these reasons, it is extremely important that wherever possible you interview the sample member alone and in private so they feel comfortable providing you with this information. It also helps to reassure them that the information they give you is confidential and no-one else will be seeing their answers.

Please familiarise yourself with the different types of **benefits** listed in the core instructions in order to be able to answer queries from respondents in the module 'Unearned income and state benefits'.

Please note that '**winter fuel allowance / payment**' does not count as a type of benefit for *Understanding Society*, and does not have to be recorded here.

17.4 Help Screens

Please refer to core instructions for more details.

17.5 Search box

Please refer to core instructions for more details.

17.6 Unproductive and proxy interviews

At the beginning of the individual questionnaire there is a question about whether you are able to interview an individual. If you are not able to get a productive interview you will need to record an individual unproductive outcome code and a second outcome code for any refusals.

Please refer to core instructions for more details.

The individual level IP9 outcome codes can be found in Chapter 22.

18. IP9 workpack

Your workpack for the IP9 should contain the following documents. If anything is missing or you need extra copies, contact your Field Co-ordinator.

No.	Document
ASSIGNMENT MATERIALS	
AREA SPECIFIC	Assignment Map – SAMPLE SPECIFIC
AREA SPECIFIC	Results Summary Sheet – SAMPLE SPECIFIC
AREA SPECIFIC	Assignment Sheet – SAMPLE SPECIFIC
AREA SPECIFIC	Sample Info Sheet – SAMPLE SPECIFIC
2	Police form
1	Interviewer pay chart
1	Interviewer feedback form
SURVEY SUPPORTING MATERIALS	
1	IP9 Interviewer Instructions
1	IP9 showcards (green cover)
3	GB Info leaflet
1	GB Info leaflet LAMINATED
5	Generic advance letter
1	Generic advance letter LAMINATED
1	Six <i>Understanding Society</i> case studies (Boomerangers, First daughter, Grandparents, Teenagers, The daily commute, Wellbeing)
5	Benefits consent information leaflet
1	Consent flowchart LAMINATED
YOUTH SELF-COMPLETION QUESTIONNAIRE	
5	Youth questionnaires (green cover)
LETTERS, CARDS AND FLYERS	
3	Tracing letter
3	Stable contact letter
20	Thank you flyer
20	MRS leaflet
10	Change of address card

20	Interviewer card
ENVELOPES	
5	Freepost DL Envelope
5	C5 'Private and Confidential' printed brown envelopes (Non window) - Privacy envelope for 10-15 year old questionnaires
8	Freepost C4 brown peel and seal envelopes addressed to High Wycombe (Survey Name: 'Understanding Society Study') (respondents and interviewers will use this to return 10-15 Questionnaires in their privacy envelopes and consent forms)
2	Pre-stamped/Queen's Head 1 st Class Blank DL envelope (for A4 letter folded in thirds) – no window (for sending Tracing and Stable Contact letters)
INCENTIVES	
5	High street gift cards

19. Admin and return of work

Connecting

You MUST get into a regular habit of connecting each day before you work on *Understanding Society*. We will be sending you emails regarding opt outs and cancelled appointments that may affect your work schedule for the day.

You will also need to connect in order to pick up any split households, movers or new web-first cases that are allocated to you.

Return of work

After each day's interviewing, you should complete your DAYREC and send both your DAYREC and all your interviews via your modem overnight. Connect to the server to return eRep Outcomes and Dimensions Data every day you work (these are separate tasks). It is essential that you send back your DAYREC along with your completed interviews in a timely fashion.

Return all completed Paper Youth Questionnaires, unused gift cards and any other paperwork to the High Wycombe TNS Office via the pre-paid envelope supplied in your work pack.

Please also remember to send back any audio files from completed interviews. See Section 5.6 for further details.

Payment

Please refer to the Paychart in your workpack for details on pay.

If you have any queries about anything covered by these instructions please contact your Regional Team who should always be your first point of contact if you have any field issues and you should contact the CAPI Helpline if you have any technical issues.

20. Practice cases and Practice CAPI

You must complete several Practice Interviews before you start work.

The IP9 Practice Capi script is UIP9PR. ALL PRACTICE INTERVIEWS MUST BE CONDUCTED UNDER THIS CAPI NAME.

To conduct a Practice Interview,

- In your eRep Grid go to UIP9PR
- Select one of the test serials you have been assigned
- Click on START SCREENER INT (do not click on PRACTICE)

Complete AT LEAST 2 practice HH's with 2 16+ Individual interviews before beginning your assignment.

Familiarise yourself with:

- ECS script for various scenarios
- Movers, refusals
- Individual interview
- Individual Interview for Rising 16 (16 year old Individual)
- Data linkage material
- Logging the administration of the Youth questionnaire
- Youth questionnaire content

The practice serials cover a range of household sizes, ages etc.

21. Benefits module details

Please refer to core instructions for more details.

22. IP9 Outcome codes

Code	Description
1	Not yet built / under construction
2	Derelict/demolished
3	Vacant / empty housing unit
4	Non residential address
5	Communal establishment / institution
6	Not main residence
18	HH OFFICE APPROVAL ONLY: Issued but not attempted
19	Other ineligible
20	HH Address inaccessible
21	HH Unable to locate address
24	HH Unknown if named HH members at address - Info refused
25	HH Unknown if named HH members at address - No Contact
26	HH Unknown if named HH members at address - OTHER REASON
27	HH Unknown if eligible person due to language barrier
40	HH No contact with anyone at address
41	HH Contact made but not with a responsible resident
50	HH Office refusal
51	HH Contact made. All info refused (1+ HH members at address)
52	HH Refusal before Grid interview (HH ELIGIBLE TO TAKE PART)
60	HH Contact made but no subsequent contact
63	HH Broken appointment - no recontact
64	HH Whole household - Ill at home during survey period
65	HH Household away or in hospital during survey period
66	HH Household physically or mentally unable/incompetent
67	HH Language difficulties with HH as a whole
69	HH Other unproductive
70	HH Completed HH & all eligible HH members
71	HH Completed HH & at least 1 individual interview
72	HH Completed HH Interview but no individual interviews
73	HH Completed HH Grid and at least 1 IV Int but no HH Int
74	HH Completed enumeration grid only
78	HH Interview - Data lost/corrupted. Int could not be redone
79	HH Interview - Household requested data to be deleted
81	HH Untraced-add unknown. No more tracing poss by TNS/client
82	HH Follow up address is in GB but is outside area
85	HH All respondents no longer eligible - died
86	HH All respondents no longer eligible - live outside UK
89	HH Untraced -no more tracing poss by int (office check done)
90	HH Follow up address is in NI
110	INTERIM No contact at address (no selection done yet)
111	INTERIM - Contact made at address but need to call back

201	HH Household no longer eligible - TSM's only
202	HH Household no longer eligible - merged with another HH
203	HH Household has already completed the survey via CAWI (web)
204	HH Split created in error - office deletion
205	HH Office use only: Not issued to interviewer
206	HH Household no longer eligible - IVs died/abroad. No TSMs
210	HH Unproductive- no IV ints(IVs within HH- all unproductive)
300	HH No phone number provided for respondent
301	HH Always ringing. No voicemail or no response on pick up
302	HH Always busy/engaged line
303	HH Always fax/modem/data line/pager
304	HH Technical phone problems
305	HH Out of service or disconnected
306	HH Always answerphone/voicemail
542	IV No contact with adult sample member
543	IV Parental consent required for 16/17yr old- NC with parent
550	IV Office refusal
552	IV Refusal before interview
553	IV Proxy refusal
554	IV Parental consent required for 16/17yr old- parent refused
555	IV Refusal during interview
557	IV Issued adamant refuser - Interview not required
560	IV Contact made but no appointment made
563	IV Broken appointment - No recontact
564	IV Ill at home during survey period
565	IV Away or in hospital all survey period
566	IV Physically or mentally unable/incompetent
567	IV Language difficulties
569	IV Other unproductive
570	IV Full adult interview
571	IV Full proxy interview
575	IV Partial adult interview
576	IV Partial proxy interview
578	IV Interview - Data lost. Interview could not be redone
579	IV Interview - Respondent requested data to be deleted
581	IV Untraced-add unknown. No more tracing poss by TNS/client
582	IV Moved within GB but outside assignment area
585	IV Individual has died
586	IV Moved outside of UK
587	IV In prison
588	IV In armed forces accommodation or institution
589	IV Untraced- no more tracing poss by int (office check done)
590	IV Moved to Northern Ireland (MB Ulster reassignment)
597	IV TSM - all OSM/PSM moved out from HH (TSM not eligible for

598	IV TSM - Moved out separately from any OSM/PSM (no tracing)
599	IV MOVER - SPLIT OFF CREATED
601	IV Adult in non-contacted household
602	IV Adult in refusal household
603	IV Adult in other non-responding household
604	IV Unknown if Adult in household - no contact
605	IV Unknown if Adult in household - refusal
606	IV Unknown if Adult in household - other reason
611	IV Youth - Paper qnaire NOT placed/completed. NC with Youth
612	IV Youth-Paper qnaire NOT placed.NC with Parent(no consent)
613	IV Youth - Paper qnaire NOT placed/completed. Youth Refusal
614	IV Youth - Paper qnaire NOT placed/done. Parent Refusal
615	IV Youth - Paper qnaire NOT placed/completed. Proxy Refusal
616	IV Youth - Paper qnaire NOT placed/completed. OTHER REASON
617	IV Youth - Paper qnaire to be returned by Youth/HH
621	IV Child under 10 in non-contacted household
622	IV Child under 10 in refusal household
623	IV Child under 10 in other non-responding household
624	IV Unknown if Child under 10 in household - no contact
625	IV Unknown if Child under 10 in household - refusal
626	IV Unknown if Child under 10 in household - other reason
701	IV Youth in non-contacted household
702	IV Youth in refusal household
703	IV Youth in other non-responding household
704	IV Unknown if Youth in household - no contact
705	IV Unknown if Youth in household - refusal
706	IV Unknown if Youth in household - other reason
710	IV Full youth interview
720	IV Partial youth interview
750	IV Ineligible for interview - aged under 10
751	IV Ineligible for adult interview - aged under 16
800	HH Untraced - int completed tracing (office check pending)
801	HH INTERIM HH not at address. Int still trying to trace
802	HH INTERIM HH not at address. New address collected in area
803	HH Household intends to complete on the web
804	HH INTERIM Household Grid started. Not yet complete
805	HH INTERIM Househld Grid COMPLETE
806	HH INTERIM HH Int started but not complete (GRID Complete)
807	HH INTERIM Household Interview COMPLETE
808	HH INTERIM Lost interview. TO BE REDONE
809	HH INTERIM Contact made - conducting Individual interviewing
810	HH INTERIM No contact made with anyone (SCREENING NOT COMP)
811	HH INTERIM Contact made-int to call back SCREENING NOT COMP
812	HH INTERIM No contact made call (SCREENING NOT YET COMP)

813	HH INTERIM Contact made - call back (FTF) (HH GRID DONE)
814	HH INTERIM No contact- valid dial tone (HH tel) (NO HH GRID)
815	HH INTERIM Contact - to call back (TEL) (HH GRID NOT DONE)
816	HH INTERIM No contact-valid tone (HH tel) (HH GRID DONE)
817	HH INTERIM Contact made - call back (TEL) (HH GRID DONE)
818	HH INTERIM No contact - disconnected/no dial tone (HH tel)
819	HH INTERIM No contact with Stable Contact (SC FTF)
820	HH INTERIM No contact with Stable Contact (SC Tel)
821	HH INTERIM No contact with neighbour
822	HH INTERIM No contact with other (O tel)
823	HH INTERIM Contact with Stable Contact (SC FTF)
824	HH INTERIM Contact with Stable Contact (SC Tel)
825	HH INTERIM Contact with neighbour (Nbr FTF)
826	HH INTERIM Contact with other contact (O Tel)
827	HH INTERIM Letter posted for Stable Contact
828	HH INTERIM Letter posted for Other
829	HH INTERIM Stable Contact NOT available on this number/addre
830	HH INTERIM Obs to be recorded (Final HH & IV outcomes done)
831	HH INTERIM Office Refusal recorded for an INDIVIDUAL
833	HH Interim Translation (assigned to interviewer to complete (Polish)
834	HH Interim Translation (assigned to interviewer to complete (Portuguese)
835	HH INTERIM Appointment arranged (SCREENING NOT YET COMP)
839	HH Interim Able to code final outcome but still pursuing
840	HH INTERIM Min visits made
850	IV Untraced - int completed tracing (office check pending)
851	IV INTERIM Not at address. Int still trying to trace
852	IV INTERIM IV not at address. Collected new add in area
858	IV INTERIM Lost interview. TO BE REDONE
860	IV INTERIM Parent consent 16/17yr old-consent yet to collect
861	IV INTERIM Youth - have consent but qnaire yet to be given
862	IV INTERIM Youth-Paper qnaire NOT yet given(no consent yet)
863	IV INTERIM Youth-Paper qnaire NOT yet given(consent given)
864	IV INTERIM Youth - Paper q'naire given but not yet collected
873	HH Interim Translation (assigned to interviewer to complete (Turkish)
875	IV INTERIM IN PROGRESS Usable Partial Individual Interview
877	IV INTERIM Interview started but not yet complete
880	IV INTERIM Appointment arranged
883	IV Individual intends to complete on the web
900	Within area but I am unable to complete (CONTACT OFFICE)
901	IV NA - NO INDIVIDUAL ASSOCIATED WITH SCREEN (HH GRID DONE)
902	IV NA - NO HH GRID
907	HH CAWI FULLY completed via CAWI
970	IV CAWI FULLY completed via CAWI

23. List of IP9 questionnaire modules

No.	Module description	Who gets asked the questions
1	Household enumeration	ALL
2	Deriving grid variables	ALL
3	Household questionnaire	ALL - one person per HH
4	Individual intro module	ALL
5	Demographics	ALL
6	Initial conditions	New entrant/never interviewed
7	Own first job	new entrant never interviewed (excluding rising 16 year olds) and current economic activity is not employed or self-employed
8	Educational aspirations	Full time student
10	YA HE Expectations	Young adults who answered these questions at IP8
11	Family background	proxy last wave, non-interviewed adult or new entrant never interviewed, excluding rising 16 year olds
12	Ethnicity and national identity	New entrant never interviewed
13	Religion	New entrant never interviewed or religion brought up in is missing or religion NI brought up in is missing
14	MTMM early	ALL
15	Disability	ALL
16	Health conditions	new entrant never interviewed
17	Smoking	ALL
18	Sexual identity	Experimental group; All CATI interviews
19	Partnership history	new entrant never interviewed, excluding rising 16 year olds
20	Fertility history	new entrant never interviewed, excluding rising 16 year olds
21	Annual event history	Interviewed at prior wave or has been interviewed previously
22	Current employment	ALL
23	Employees	Employees
24	Self-employed	Self-employed
25	Non employment	Did no paid work in the last week and does not have a job
26	Second jobs	ALL
27	Parental education expectations	Parents who answered these questions at IP8
28	Unearned Income & State Benefits	ALL
29	Household finances	ALL

30	FCA consent	ALL
31	Finance summary	Experimental group
32	Left-right political orientation	ALL
33	MTMM late	ALL
34	CASI start	ALL where mode is face to face
35	CASI: Satisfaction	Mode is face-to-face and has agreed to self-completion OR mode is telephone OR web
36	CASI: Mobile device use	Mode is face-to-face and has agreed to self-completion OR mode is telephone OR web
37	CASI: Item count	Mode is face-to-face and has agreed to self-completion OR mode is telephone OR web
38	CASI: Immigration direct	Mode is face-to-face and has agreed to self-completion OR mode is telephone OR web
39	CASI: Sexual orientation	Mode is face-to-face and has agreed to self-completion OR mode is web
40	CASI: Vignettes	Mode is face-to-face and has agreed to self-completion OR mode is telephone OR web
41	CASI: End	Mode is face-to-face
42	DWP consent	All who don't have current consent recorded
43	Employer link consent	Employed or self-employed
44	Benefit unit finances	ALL (except where consent to share information is refused, or where young adult is classified as a dependent child living with their parents)
45	Respondent Contact Details	ALL
46	Stable Contact Details	ALL
47	Online experience	Mode is web
48	End of interview	ALL
49	Interviewer observations	Mode is face-to-face OR telephone
50	Proxy	Proxy interviews only

24. How to Use AddInfo in ECS

24.1 What is AddInfo

AddInfo is a table of data items that are used at various points within the questionnaire or for producing the SIS, advance letters or emails. Items with the prefix “ff_” are feed forward variables ie data items collected from the last wave of interviewing or updated between waves. These items form part of the sample information provided by the University of Essex. Other items are created by the Sampling Department at TNS-BMRB and are used by Sampling and Field to allocate and manage fieldwork.

24.2 How to access the AddInfo?

- Open EReps and click on the Screen number you want to view the AddInfo for. In the row for “Selected Respondent” there is a button for “Open all Call History”
- Click on “Open all Call History”. This brings up the Call History for that serial number. The AddInfo button is in the centre bottom.
- Click on “Additional info”. Use the vertical scroll bar to see all variables.

To close the AddInfo screen: click on the red button marked “x” in the top right.

24.3 Where can I find full names, DoB, telephone numbers and login details?

Many of the data items are used to populate fields within questions during the interview eg relationships and job description. Other useful items are those that show the full details for the items on the anonymised SIS eg:

Full name: *ff_forname, ff_surname*

DoB: *ff_birthd, ff_birthm, ff_birthy*

Telephone numbers (respondent): *ff_rhland, ff_rphmob, ff_rphwrk, ff_homephon*

Telephone numbers (contact person): *cttel, ff_ctte2*

Telephone numbers (movers): *NewAddress2_Telephone,
NewAddress3_Telephone,
NewAddress4_Telephone,*

Useful information for re-contact: *ff_saadinf*

Date of individual interview at previous wave: *ff_intdate*

Username and password for WEB interviews: *UserName, Password*

These fields are highlighted in the table below.

24.4 Complete list of all AddInfo data

Variable	Description	Values
HHSerial	Household serial number	digits 1-4 = sample point; digits 5-6 = incremental HH ID within that point;
IndivSerial	Individual serial number	digits 1-4 = sample point; digits 5-6 = 2 digit TNS HH ID (digits 5-6 of HHSerial); digits 7-8 = incremental Individual ID within that household;
Screen	Screen number	00 for household, 01-16 for household individuals, 17+ for each rejoiner in the rejoiner file
ff_tel	<i>NOT RELEVANT FOR IP9</i>	1 = telephone interview 0 = Otherwise
ff_nonprod	Non-productive household at preceding wave:	1 = household refusal 2 = household non-contact 3 = no interview due to age/ill-health 4 = untraced split-off household 5 = untraced (unknown address) 6 = other non-productive 7 = other "dormant" household 8 = untraced/dormant with email address
Field_Region_2	Field region	Values 1 to 6
ADMIN_HHOLD	Original or split household	1 = Original household 2 = Split household
ff_sid	Survey Identifier	Survey Identifier Digits 1-5 of HID
ff_newhid	Current wave HID	Current wave HID; digits 1-2 = wave number; digit 3 = stage (0 for IP; 1 for DR; 2 for Main); Digits 4-5 = month of issue (when originally issued) but for the DR this will be 01 for all cases; Digits 6-10 = incremental unique ID within wave; Digit 11 = original household (issued in this wave) or a split household created during (or immediately prior to) fieldwork. It's 0 for the original household, 1 for the first split, 2 for the 2nd split etc.; Digit 12 = check digit
ff_EMBoostLW	<i>NOT RELEVANT FOR IP9</i>	1 = EM boost 0 = Otherwise
ff_GPCompareLW	<i>NOT RELEVANT FOR IP9</i>	1 = GP comparison sample 0 = Otherwise
ff_EMBoost	<i>NOT RELEVANT FOR IP9</i>	1 = EM boost: 0 = Otherwise
ff_hhgrid_mode_dv	Hhold grid mode type:	1 = CAPI 2 = CATI 3 = CAWI 4 = Unproductive
ff_GPCompare	<i>NOT RELEVANT FOR IP9</i>	1 = GP comparison sample 0 = Otherwise

ff_address1	Address Line1	
ff_address2	Address Line 2	
ff_address3	Address Line 3	
ff_address4	Address Line 4	
ff_address5	Address Line 5	
ff_postcode	PostCode	
ff_country	Previous wave Region of residence:	1 = England 2 = Wales 3 = Scotland 4 = Northern Ireland
ff_homephone	Home Telephone Number	
ff_all_moved	If all members of the household since previous interview have moved	1 = To known address 2 = To unknown address 3 = Out of scope 4 = Deceased
ff_suspsplit	Suspected split-off mover	1 = Yes 0 = Otherwise
ff_outcomelw	Household outcome at IP8	
ff_useother	Other useful info	
ff_saadinf	Useful information for re-contact	
ff_forname	First Name	
ff_surname	Surname (Family Name)	
ff_sex	Sex	
ff_birtd	Day of birth	
ff_birtdm	Month of birth	
ff_birthy	Year of birth	
ff_intdate	Date of individual interview at previous wave	Date of individual interview at previous wave
ff_HHComment	Household level comments	
ff_IndivComment	Individual comments	
ff_potrejoiner	Potential rejoiner flag:	1 = Yes 2 = Yes, and in an untraced but fed forward split-off household 0 = Otherwise
ff_LDA	<i>NOT RELEVANT FOR IP9</i>	1 = LDA ethnic minority respondent 0 = Otherwise
ff_idateiv	Day of week, date and time of day when the individual was interviewed at previous wave	
ff_ivlowlw	Individual Interview Outcome at IP8	1 = individual interview (inc. tel.) 2 = proxy interview 3 = adult not interviewed 4 = youth interview 5 = youth not interviewed 6 = child
ff_everint	Ever full individual interview (inc. tel.)	1 = Interviewed previously 2 = Never interviewed
ff_lingua	<i>NOT RELEVANT FOR IP9</i>	

ff_conlang	Individuals contact language: <i>NOT RELEVANT FOR IP9</i>	0 = English 1 = Arabic 2 = Bengali 3 = Cantonese 4 = Gujarati 5 = Punjabi: Gurmukhi 6 = Punjabi: Urdu 7 = Somali 8 = Urdu 9 = Welsh 10 = Polish 11 = Portuguese 12 = Turkish
ff_rhland	Home landline number	
ff_rphmob	Personal mobile phone number	
ff_rphwrk	Work phone number	
ff_remail	Email address	
ff_ctname	Name of contact person	
ff_ctrel	Relationship to respondent:	1 = Mother / Father 2 = Son / Daughter 3 = Brother / Sister 4 = Aunt / Uncle 5 = Grandparent 6 = Other Relative 7 = Friend / Work Colleague 8 = Someone else
ff_ctadd1	Address line 1	
ff_ctadd2	Address line 2	
ff_ctadd3	Address line 3	
ff_ctadd4	Address Line 4	
ff_ctadd5	Address Line 5	
ff_ctpcode	Postcode	
ff_cttel1	Telephone number	
ff_cttel2	Alternative telephone number	
ff_ctemail	Email address	
ff_exclude	Part of the household, but not to be contacted:	1 = Deceased (for confirmation – see above) 2 = Refuses to participate 3 = Too old / infirm 4 = Other no contact Blank otherwise
ff_marstat	Legal Marital Status at previous interview:	1 = Single, never married or never in a Civil Partnership 2 = Married 3 = Legally recognised Civil Partnership 4 = Separated, but legally married 5 = Divorced 6 = Widowed 7 = Separated from Civil Partner 8 = Former Civil Partnership (legally dissolved) 9 = Surviving Civil Partner

ff_r01 to ff_r016	Relationship codes (as per household grid) at previous household enumeration:	0 = Self 1 = Husband/Wife 2 = Partner/Cohabitee 3 = Civil Partner 4 = Natural son/daughter 5 = Adopted son/daughter 6 = Foster child 7 = Stepson/stepdaughter 8 = Son-in-law/daughter-in-law 9 = Natural Parent 10 = Adoptive parent 11 = Foster parent 12 = Step-parent 13 = Parent-in-law 14 = Natural brother/sister 15 = Half-brother/sister 16 = Step-brother/sister 17 = Adopted brother/sister 18 = Foster brother/sister 19 = Brother/sister-in-law 20 = Grand-child 21 = Grand-parent 22 = Cousin 23 = Aunt/Uncle 24 = Niece/Nephew 25 = Other relative 26 = Employee 27 = Employer 28 = Lodger/Boarder/Tenant 29 = Landlord/Landlady 30 = Other non-relative
ff_spid	Spouse PID	Computed if living with spouse at previous interview
ff_ppid	Partner PID	Computed if cohabiting with partner at previous interview
ff_absent	Absent at previous interview:	1 = At boarding school 2 = In halls of residence 3 = In an institution
ff_ivlowlw01-ff_ivlowlw05	Participation in previous waves. ff_ivlowlw01 for wave 1, ff_ivlowlw02 for wave 2, etc. (uses the same coding frame as ff_ivlowlw)	For waves 1-5. Blank for waves 6+ and waves prior to wave 1
ff_brfedlw	Flag indicating whether child was breastfed at the last wave the biological mother was interviewed	1 = Breastfed previous wave Blank otherwise
ff_pid	PID	Digits 1-11 = digits 1-11 from HID; Digits 12-13 = the person number of that person from the first wave they are enumerated in; Digit 14 = check digit
ff_hholdcontact	Principal household contact	
ff_hhcphone1	Principal contact landline	
ff_hhcphone2	Principal contact mobile	
ff_jbsemp	Employment type at previous interview:	1=Employee 2=Self-employed

ff_jbstat	Employment Status at previous interview:	1 = Self employed 2 = In paid employment 3 = Unemployed 4 = Retired 5 = On maternity leave 6 = Looking after family or home 7 = Full-time student 8 = Long term sick or disabled 9 = On a government training scheme 10 = Unpaid worker in a family business 11 = Working in an apprenticeship 97 = Doing something else
ff_emplw	Whether in paid employment at previous interview	1 = in paid employment 2 = not in paid employment
ff_jbsoc00	Occupational description	(verbatim)
ff_xsoc2000	Four digit SOC code	
ff_jbsic07	Industry description	(verbatim)
ff_sic2007	Five digit SIC code	Five digit SIC code
ff_jbmngr	Managerial duties (employees):	1 = A manager 2 = A Foreman/supervisor 3 = Not a manager or supervisor
ff_jbsize	Number of people at workplace (employees):	1 = 1 – 2 2 = 3 – 9 3 = 10 – 24 4 = 25 – 49 5 = 50 – 99 6 = 100 – 199 7 = 200 – 499 8 = 500 – 999 9 = 1000 or more 10 = Don't know but fewer than 25 11 = Don't know but 25 or more
ff_bentype01 to ff_bentype41	Non-employment income sources at previous wave:	1 = Mentioned 0 = Not mentioned
ff_soccont	Permission to use social network sites	Permission to use social network sites
ff_hlpreg	Whether pregnant at previous interview:	1 = Pregnant Blank, or zero, otherwise
ff_drive	Has driving licence at previous interview:	1 = Has licence 2 = No licence
ff_notuk	Flag for non-UK citizens:	1 = Not a UK citizen Blank otherwise
ff_newimm	Recent immigrant:	1 = Recent immigrant 0 = Otherwise
NewAddress2_1		
NewAddress2_2		
NewAddress2_3		
NewAddress2_4		
NewAddress2_5		
NewAddress2_Postcode		
NewAddress2_Telephone		
NewAddress3_1		
NewAddress3_2		
NewAddress3_3		
NewAddress3_4		
NewAddress3_5		

NewAddress3_Postcode		
NewAddress3_Telephone		
NewAddress4_1		
NewAddress4_2		
NewAddress4_3		
NewAddress4_4		
NewAddress4_5		
NewAddress4_Postcode		
NewAddress4_Telephone		
ff_hsbds	Number of bedrooms at previous interview	
ff_hsrooms	Number of other rooms at previous interview	
ff_hshownd	Tenancy Status at previous interview:	1 = Owned outright 2 = Owned/being bought on mortgage 3 = Shared ownership(part owned/part rented) 4 = Rented 5 = Rent free 97 = other
ff_sampst	Sample membership status:	1 = OSM 2 = PSM 3 = TSM
Fresh	<i>NOT RELEVANT FOR IP9</i>	values: 1 or blank 1 = Fresh Sample blank = ISER sample
ff_idate	Interview date for the household interview:	
ff_mail_flag	Advance letter code	
Month	months within wave	values: 1 to 24
ff_dead	Notified deceased since last interview:	1 = Deceased since previous wave 2 = Otherwise
ff_hhorig	Sample origin	7 = Original IP sample (IP1) 10 = IP4 refreshment sample 11 = IP7 refreshment sample
ff_xpmg	Last total monthly mortgage payment (from previous interview)	
Ff_rent	Net amount of last rent payment (from previous interview)	
Ff_rentwc	Weeks covered by last rental payment (from previous interview)	
Ff_edtype	Type of educational institution attending (from previous interview)	1 = School 2 = 6 th form college 3 = FE college 4 = HE college 5 = University
Ff_paytyp	Salaried or paid by the hour (from previous interview)	1 = Salaried 2 = Salaried plus commission 3 = Hourly paid 97 = Other

Ff_worktrav	Mode of transport for journey to work (from previous interview)	1 = Car 2 = Lift with person in hhold 3 = Lift with person not in hhold 4 = Motorcycle, etc 5 = Taxi/minicab 6 = Bus/coach 7 = Train 8 = Underground, etc 9 = Cycle 10 = Walk 97 = Other
Ff_jspart	Own account or partnership (from previous interview)	1 = Sole owner 2 = Partnership
Ff_jsworktrav	Mode of transport to work (from previous interview).	1 = Car 2 = Lift with person in hhold 3 = Lift with person not in hhold 4 = Motorcycle, etc 5 = Taxi/minicab 6 = Bus/coach 7 = Train 8 = Underground, etc 9 = Cycle 10 = Walk 97 = Other
Ff_health	Long standing illness or disability	1 = Yes 2 = No
Ff_diw5	IP5 Dependent interviewing wording experiment <i>NOT RELEVANT FOR IP9</i>	1 = Still the case 2 = Has this changed 3 = Balanced, still first 4 = Balanced, changed first
Ff_disabilityw6	IP6 disability data quality experiment <i>NOT RELEVANT FOR IP9</i>	1 = group A 2 = group B 3 = group C
Ff_reversew7	IP7 reverse response option experiment <i>NOT RELEVANT FOR IP9</i>	1 = Standard responses 2 = Reversed order
Ff_motivw7	IP7 motivational message experiment <i>NOT RELEVANT FOR IP9</i>	1 = Receives message 2 = Does not receive message
Ff_envtaxqw7	IP7 environmental tax question experiment <i>NOT RELEVANT FOR IP9</i>	1 = Question Version A 2 = Question Version B 3 = Question Version C 4 = Question Version D 5 = Question Version E 6 = Question Version F 7 = Question Version G 8 = Question Version H 9 = Question Version I 10 = Question Version J
Ff_contintw7	Interesting questions experiment <i>NOT RELEVANT FOR IP9</i>	1 = Tailored questions 2 = Control, no tailored questions
Ff_mtmmw7	IP7 Multi-trait Multi-method experiment <i>NOT RELEVANT FOR IP9</i>	Values 1-56
Ff_trwinw7	IP7 time/risk preference experiment <i>NOT RELEVANT FOR IP9</i>	Values 1-10

Ff_trqw7	IP7 time/risk preference experiment <i>NOT RELEVANT FOR IP9</i>	Values 1-91
Ff_trdw7	IP7 time/risk preference experiment <i>NOT RELEVANT FOR IP9</i>	Values 1-10
Ff_diaryweekw7	IP7 Time Diary <i>NOT RELEVANT FOR IP9</i>	1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday
Ff_paygl	Gross pay (from previous interview)	
Ff_paygwc	Gross pay period (from previous interview)	
Ff_paynl	Net pay (from previous interview)	
Ff_paynwc	Net pay period (from previous interview)	
Ff_jbhrs	Number of hours normally worked (from previous interview)	
Ff_jshrs	Self-employed hours normally worked per week (from previous interview)	
Ff_jbterm1	Current job: permanent or temporary	1 = Permanent 2 = Temporary
Ff_lkmove	Prefers to move house (from previous interview)	1 = Stay here 2 = Prefer to move
Ff_diarywew7	IP7 Time Diary <i>NOT RELEVANT FOR IP9</i>	1 = Saturday 2 = Sunday
Ff_incentw7	IP7 incentive experiment <i>NOT RELEVANT FOR IP9</i>	Values 1-51
Ff_condincw7	Conditional incentives experiment <i>NOT RELEVANT FOR IP9</i>	1 = Control group 2 = Treatment
ff_issue_mode	Allocated interview mode <i>NOT RELEVANT FOR IP9</i>	1 = CAPI first 2 = Web first 3 = Web only
Tranche		Values 1 - 100
ff_ivlowlw06- ff_ivlowlw09	Participation in previous waves. ff_ivlowlw01 for wave 1, ff_ivlowlw02 for wave 2, etc. (uses the same coding frame as ff_ivlowlw)	For waves 1-5. Blank for waves 6+ and waves prior to wave 1
Ff_consentben	Benefit records consent	0 = no consent information (e.g., never asked consents) 1 = consent revoked 2 = consent rejected more than once 3 = consent rejected once only 4 = consent given, form is present and valid 5 = consent given, either form is not present or present but not valid
Ff_scriptnow7	Script number from wave 7	

Ff_gridmodew8	IP8 mixed mode allocation <i>NOT RELEVANT FOR IP9</i>	1 = F2F (CAPI-first) 3 = WEB (WEB-first)
Ff_reversew8	IP8 reverse response option experiment <i>NOT RELEVANT FOR IP9</i>	1 = Standard responses 2 = Reversed order
Ff_mtmmw8	IP8 Multi-trait Multi-method experiment <i>NOT RELEVANT FOR IP9</i>	Values 1-56
Ff_wageinfow8	IP8 education expectations information treatment experiment <i>NOT RELEVANT FOR IP9</i>	1 = Wage information given 2 = No wage information given
Ff_ictimw8	IP8 immigration item count experiment <i>NOT RELEVANT FOR IP9</i>	1 = Control 2 = Muslim countries item count 3 = East European item count 4 = Caribbean item count
Ff_sexidw8	IP8 sexuality measurement direct question experiment	1 = UKHLS protocol 2 = IHS protocol
Ff_ictsexw8	IP8 sexuality measurement item count experiment	1 = Group A 2 = Group B
ff_pris	Absent in prison at previous interview	1 = Absent at prison 0 = Otherwise
Ff_lowwebw8	IP8 low-web propensity	-9 = Inapplicable, prior wave WEB allocation 0 = WEB allocation 1 = Low WEB propensity
Ff_incentw8	IP8 incentive experiment	Values 1-87
ff_email_flag	Advance email code	
Ff_oldhid	Previous wave HID	
UserName	Username for CAWI interview	
Password	Password for CAWI interview	
Ff_yahechoiceip8	Responded to young adult expectations questions at IP8	1 = Received questions 0 = Did not receive questions blank if not interviewed
Ff_bufmodule	Benefit unit finance type	1 = Version A : gross flows 2 = Version B : net flows
Ff_mtmmw9	IP9 Multi-trait Multi-method experiment	Values 1-56
Ff_paredexpectip8	Responded to parental expectations questions at IP8	1 = Received questions 0 = Did not receive questions blank if not interviewed
Ff_paredaboutip8	PID of child who was subject of parental expectation questions at IP8	
Ff_incomesummary	Benefit unit summary options	1 = Summary screen not used 2 = Summary screen used
Ff_satisw9	Presentation options for satisfaction question	1 = Grid format 2 = One per screen, vertical 3 = One per screen, horizontal

Ff_ictimw9	IP9 immigration item count experiment	1 = Control 2 = Muslim countries item count 3 = East European item count 4 = Caribbean item count
Ff_maildayindw9	Day of email sent to non-responding individuals	0 = Sunday 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday 7 = Control 8 = Unassigned
Ff_gridmodew9	IP9 mixed mode allocation	1 = F2F (CAPI-first) 3 = WEB (WEB-first)
Ff_maildayhhw9	Day of email sent to the entire household	0 = Sunday 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday 7 = Control 8 = Unassigned
Ff_incentw9	IP9 incentive experiment	Values 1-87
Ff_intqw7	Interesting question type	
Ff_intqtxtw7	Interesting question text fill (64 chars max)	
Ff_intqtxtw7a	Interesting question text fill (64 chars max)	
ff_trflag	IP7 time/risk preference experiment. Flag calculated at IP6 for individual selected to participate in the Time/Risk preference experiment.	

IP9 COA Card

Moving home? Take us with you

www.understandingsociety.ac.uk
contact@understandingsociety.ac.uk

FREEPOST RRXX-KEKJ-JGKS
Understanding Society, University of Essex
Wivenhoe Park, Colchester, CO4 3SQ



Your continuing participation is very important to us. Please let us know if you move by updating your details on the *Understanding Society* website at **www.understandingsociety.ac.uk**, alternatively you could call us on **Freephone 0800 252 853** or return this card in the **Freepost envelope** (no stamp needed). To say thank-you we will send you a £5 voucher.

Name: _____

MOVING TO...

PID: _____

New Address: _____

MOVING FROM...

Home phone: _____
(inc STD code)

Postcode: _____

Mobile: _____

Postcode: _____

E-mail address: _____

Date of move: _____

Please let us know who will be living with you at your new address. Please list their full names below as we may like to ask them to take part in *Understanding Society* in the future. If possible, please provide their mobile number.

Name: _____

Mobile: _____

Name: _____

Mobile: _____

Name: _____

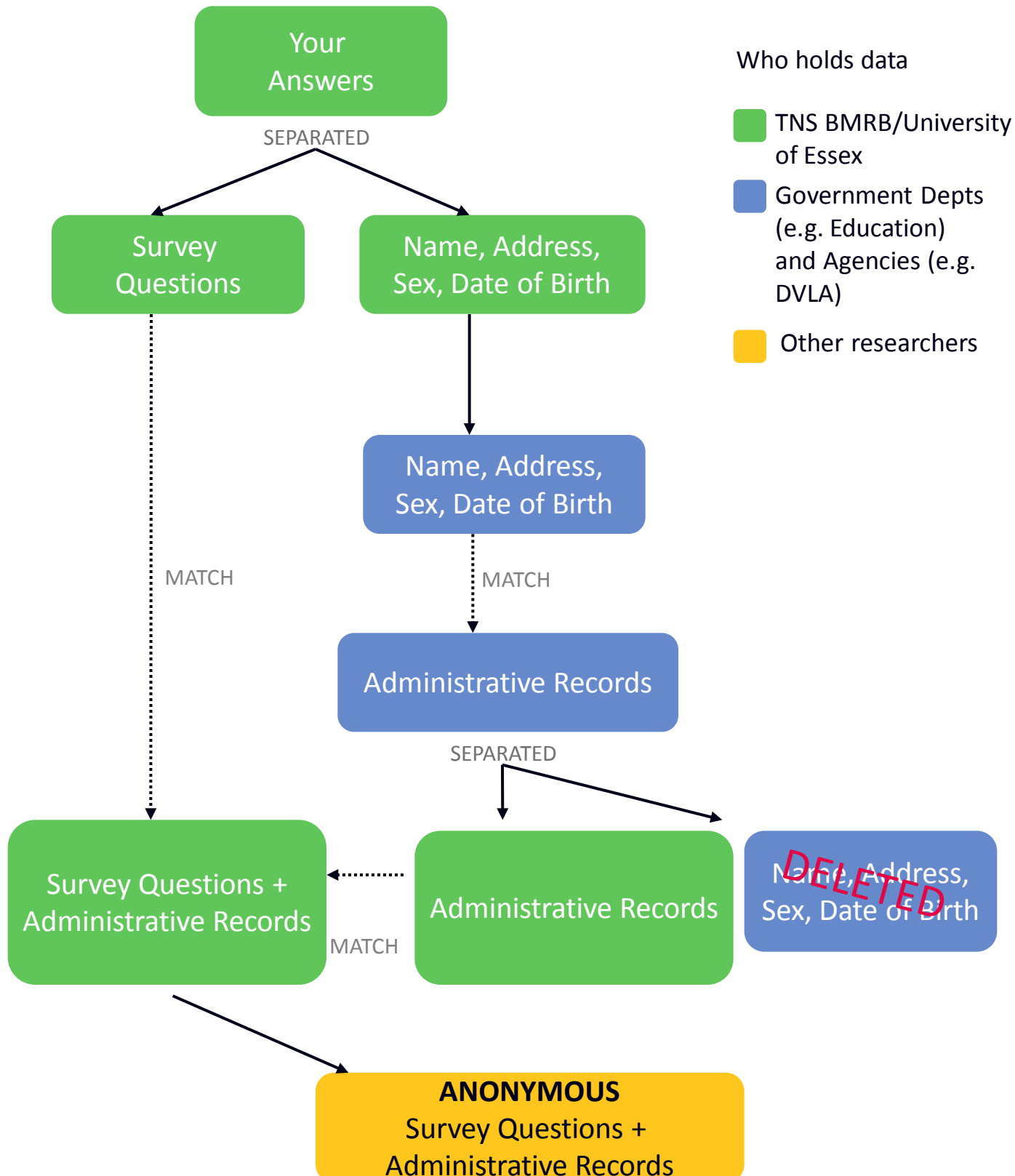
Mobile: _____

Name: _____

Mobile: _____

IP9 Consents Flowchart

Data Flow for Administrative Records



IP9 Consents info leaflet Economic Consent



Information on adding economic records



Understanding
Society

Data linking

Government departments and agencies collect a range of information about all of us for administrative purposes, so they can plan and provide services. Added to the responses you have provided in this study the information can inform further analyses and help us get a better picture of those who are using services provided by the government.

What am I being asked to give permission for?

The Department for Work and Pensions (DWP) keeps records of everybody's benefit claims and any periods people spend on employment programmes.

The *Understanding Society* study at the University of Essex would like to add these records to the responses you have given to this study.

If you give your permission, it will inform further analysis to help us get a better picture of those who are claiming benefits and how they can best be helped.

What will happen if I give permission?

- 1) The *Understanding Society* study will give the DWP your name, address, sex and date of birth.
- 2) The DWP will use these details to identify the correct records it holds about you.
- 3) The DWP will send your DWP records to the *Understanding Society* study.
- 4) The DWP will not keep any of the personal information passed on to them.
- 5) The *Understanding Society* study will add the DWP records to your study responses.
- 6) Your personal information (name and address) will be removed before any research is done.

What will the research be used for and who will use it?

Like your study responses, the additional information would be used by professional academic and social policy researchers for non-commercial research and statistics. Any sensitive information would only be made available to them under restricted access arrangements which make sure that the information is used responsibly and safely. Names and addresses are never included in the results and no individual can be identified from the research.

The data will not be used to work out whether any individual is claiming benefits they should not be and will not affect any current or future claims for benefits.

What if I change my mind?

You can withdraw permission at any time for your DWP records to be added to your study answers.

Who do I contact?

If you would like any further information or want to withdraw your permission, please contact us at:

FREEPOST RRXX-KEKJ-JGKS,
Understanding Society,
University of Essex,
Wivenhoe Park,
Colchester,
CO4 3SQ.

Freephone 0800 252853

Email: contact@understandingsociety.org.uk





Thank-you

If you have any questions or concerns,
just call our Freephone number 0800 252 853
or write to Freepost RRXX-KEKJ-JGKS,
Understanding Society, University of Essex,
Wivenhoe Park, Colchester, CO4 3SQ

IP9 Generic Advance Letter



Dear Sir/Madam,

A chance to influence decision making.

I would like to enlist your help. The Understanding Society survey helps researchers and policy makers understand the changes in the needs of the country. By taking part, you'll be helping to influence the decisions made by everyone from government ministers to local councillors.

An interviewer will soon be in touch with you to arrange a convenient time to talk to you. The interview will last between 40 minutes and an hour, depending on your circumstances. On the day, the interviewer will be carrying photographic identification.

Your participation is entirely voluntary, but we do hope you'll be able to help. By taking part, your voice is heard. If you have any questions, please call us on **0800 015 2908** or contact us at understandingsociety@tns-bmrb.co.uk.

With many thanks,

Professor Michaela Benzeval

Director, Understanding Society
Institute for Social and Economic Research
University of Essex

**We need
your help**



**We'll arrange
a time**



**Complete
the survey**



Find out more



Contact us:

Participant helpline
(Colette):

0800 252 853

Web:

understandingsociety.ac.uk

Email:

contact@understandingsociety.ac.uk

You can also follow us on

Twitter @usociety.

Why are you important to us?

You make the survey more complete and useful. Without you, the study is less complete.

You have been specially selected to help us make sure that Understanding Society represents a wide cross section of the population. This way, we can see how factors such as the economy or housing affect lives across the whole of Britain.

Your participation is crucial to the success of the study, its value to researchers and accuracy of their research findings. If we lose you, we can't replace you.



What is the study about?



Understanding Society is a long-term study that helps us find out about the issues that matter to everyone. How is the recession affecting you? Are you happy with your local services and facilities? Are your health care requirements being met?

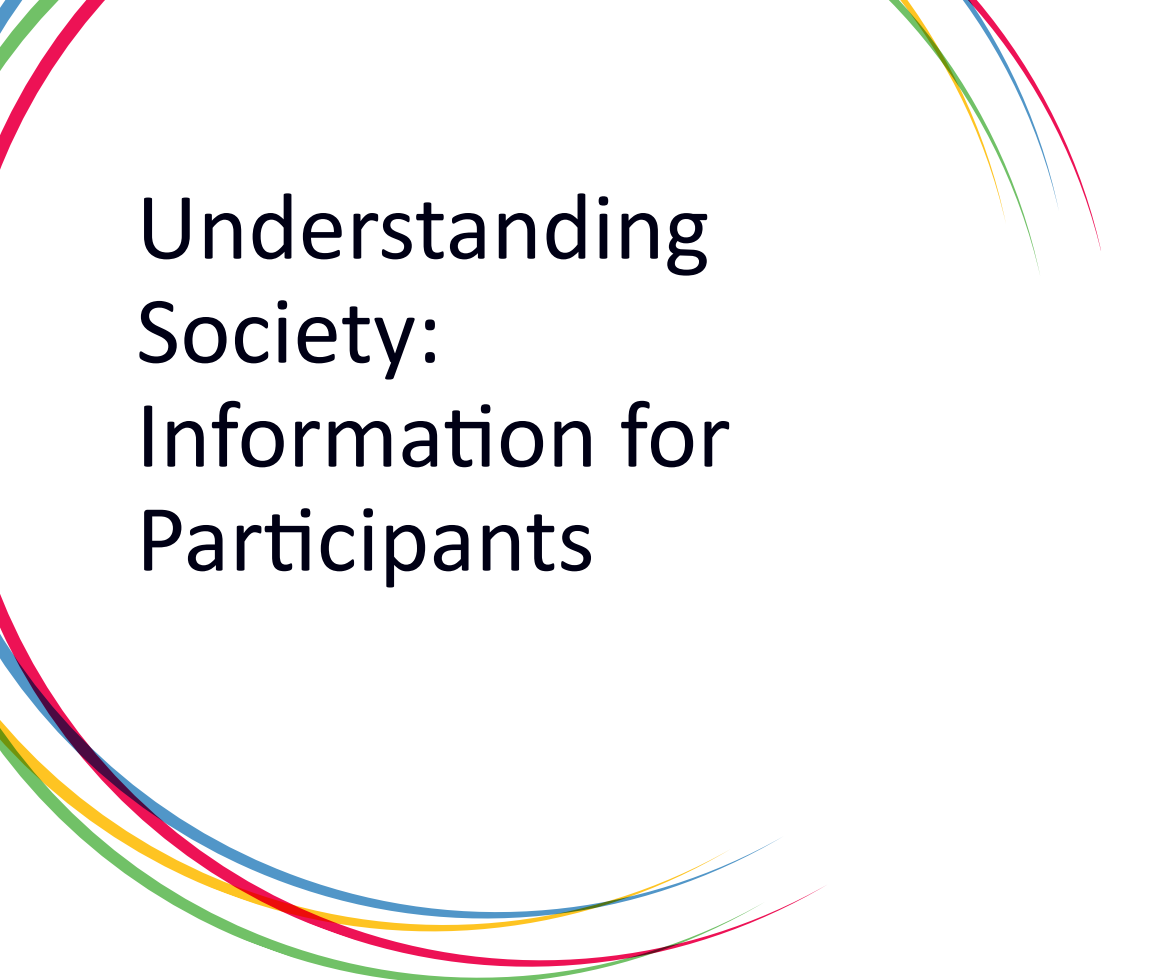
The information we collect is used by academics and researchers to inform policy debates on issues that matter to you.

Why do you interview young people?

Young people's opinions matter to us, too. If there are young people aged 10-15 in your household, we hope that they can complete their part of the survey. We'll ask them about their hobbies, friends, school life and hopes for the future. Each child that takes part will receive a £5 voucher.

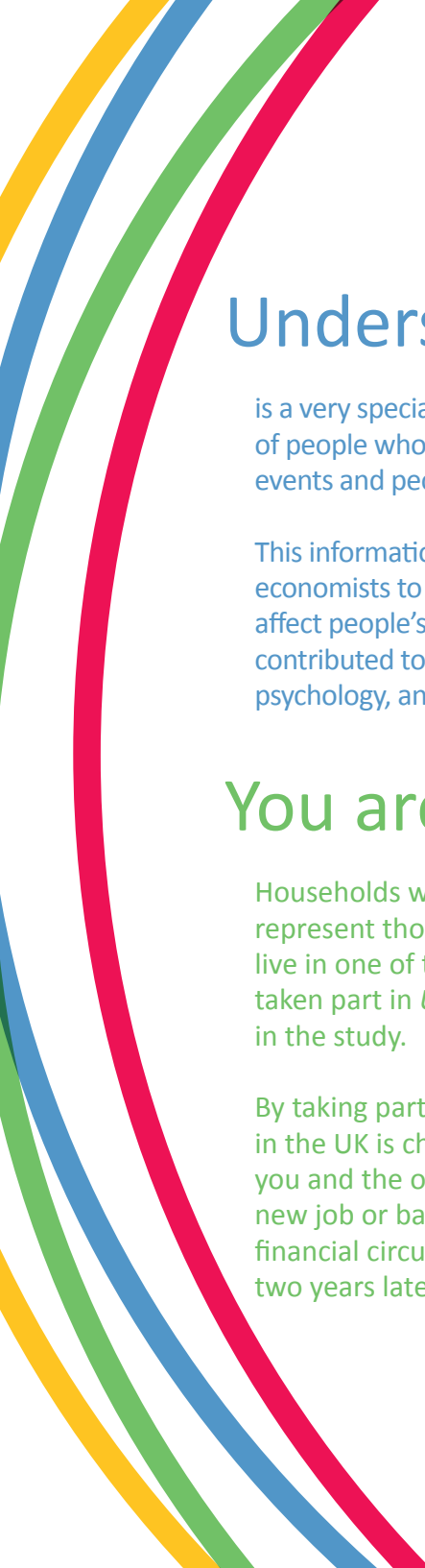


IP9 Info Leaflet



Understanding Society: Information for Participants





Understanding Society...

is a very special study that follows the lives of tens of thousands of people who live in the UK, collecting information about the events and people that affect them.

This information is used by social scientists, policy makers and economists to help make better decisions about things that affect people's lives. In the past, studies like this have contributed to changes in the law, given insights into human psychology, and helped doctors treat illnesses more effectively.

You are important to us

Households were chosen to take part in this study to represent thousands of other people living in the UK. If you live in one of those households, or with someone who has taken part in *Understanding Society* before, you can take part in the study.

By taking part, you are helping to create a record of how life in the UK is changing and what impact those changes have on you and the other people you live with, for example, how a new job or baby affects your health and well-being, your financial circumstances and personal relationships a year or two years later.

What do I have to do?

To join in, all you have to do is answer some questions about your life and your opinions. If you are already a member of the study you will be familiar with most aspects of the interview. The interview will take approximately 45 minutes to an hour, depending on your circumstances. It will cover some of the key areas of your life such as health, employment, retirement, personal relationships, friends and family, childcare, and leisure activities.

Do you just want to talk to me?

We would like to talk to everyone aged 16 and over who lives in your home. With parents' consent, we would also like young people aged 10-15 to fill in a short questionnaire.

Are you new to this household?

You are being asked to take part because you are now living in the household of someone who has previously taken part in the study.

Without your input, we won't be able to gain a complete understanding of how household and family circumstances may be changing.

What do I get out of it?

Each person in the household who takes part will receive a High Street voucher that can be used at a range of retailers. Young people aged 10-15 who complete a self-completion questionnaire will receive a £5 High Street voucher. As a member of *Understanding Society* you will also have access to study findings and research updates.

Is the study confidential?

Yes, we always take great care to protect the confidentiality of the information you give us, in accordance with the Data Protection Act. The results of the study will be used for research purposes only. You can ask to see your details at any time or to have them removed from our database. The data is and will remain anonymous – it will be impossible for anyone to identify you or your household from the study's results.

Who is doing the research?

Researchers at the University of Essex are running *Understanding Society* together with TNS BMRB. Funding has been provided by the Economic and Social Research Council (ESRC).

How do I find out more?

If you'd like some more information on the study: visit www.understandingsociety.ac.uk, email contact@understandingsociety.ac.uk, call the University of Essex on Freephone 0800 252 853 or write to **FREEPOST RRXX-KEKJ-JGKS, Understanding Society, University of Essex, Wivenhoe Park, Colchester, CO4 3SQ**. We'll be really pleased to hear from you.



IP9 Interviewer Card



Understanding Society

0800 015 2908

www.understandingsociety.ac.uk

contact@understandingsociety.ac.uk



11834313

IP9 Interviewer Feedback Form



IP9 Interviewer Feedback Form

Interviewer name: Number:

We would like to collect feedback from you about IP9; please tell us about your experiences of working on it by completing this interviewer feedback form. Once completed, please return this in the prepaid envelope to High Wycombe, by **September 16th**.

Please read through the questions on this form after each interview and add notes as appropriate. Please also review the whole form once you have completed your assignment and include as much detail as possible.

FIELDWORK SUMMARY

Number of households successfully interviewed (productive households, i.e. household interview plus at least one adult individual interview):

Number of achieved individual interviews (adults 16+):

1. MIXED MODE EXPERIMENTS

CAPI-FIRST AND WEB-FIRST SAMPLE GROUPS

SAMPLE TRANSFERRED FROM WEB

- a. Please tell us below any reasons WEB sample members gave for not having completed their questionnaire online.

- b. Did you have any difficulties in monitoring CAWI progress?

Yes

☐

➡ Q1g

No

☐

➡ Q2a

- c. Please describe these below.

d. When making calls, did any respondents say they intended to complete the survey online?

Yes

☐

➡ Q1i

No

☐

➡ Q1j

e. Please describe what happened next. For example:

- Did respondents already have their login details?
- Did respondents then actually complete the survey online?
- Did you need to follow up these cases? If so, what did respondents say?

f. Is there anything that would make it easier for you to monitor CAWI progress? If so, please give details below.

2. FINANCES

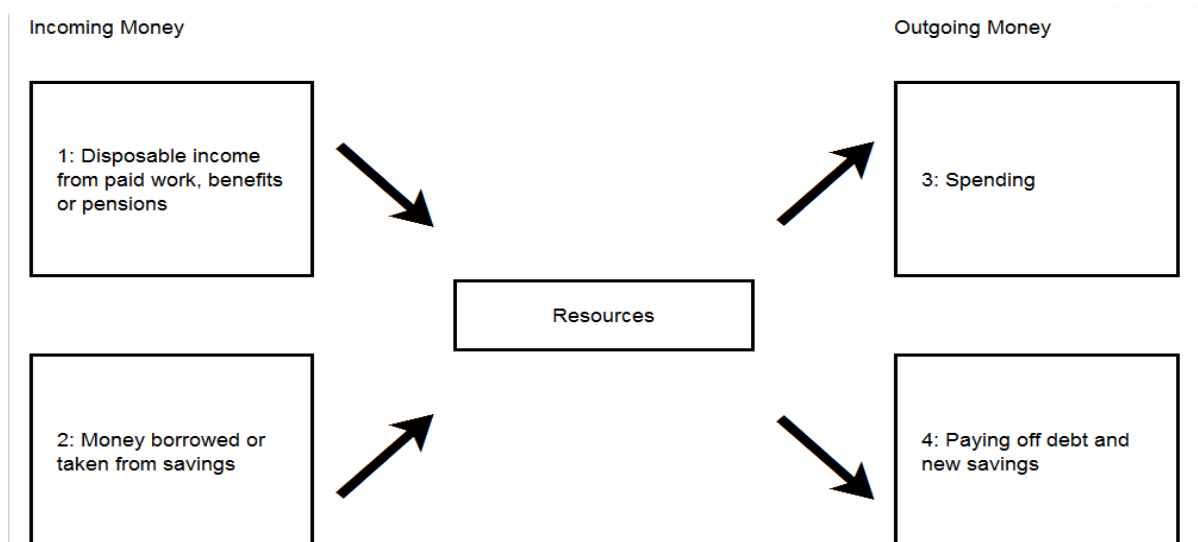
The following section is about the Benefit unit finances questions and the Finance summary. These were the questions about balancing income, expenditure, savings and debt. They also included summary screens showing the financial information respondents had reported and allowing respondents to make corrections or amendments.

- a. In general, did respondents find these questions easy or difficult to answer?

Please tick the answer which best fits your experience.

Respondents generally found these questions very easy to answer	
Respondents generally found these questions quite easy to answer	
Not sure / It varied too much to say	
Respondents generally found these questions quite difficult to answer	
Respondents generally found these questions very difficult to answer	

Respondents were shown the following diagram:



- b. How did respondents react to this diagram? Do you think respondents generally understood the explanation of the diagram? Did they have any questions for you at this point – what did they ask?

INCOME

Respondents were shown a summary of the income sources they had claimed during their interview. This could have been after the self-completion section (for either individuals or couples) or before the self-completion section (for individuals only).

c. Did respondents make any changes or corrections at these screens?

Yes

☐

➡ Q2d

No

➡ Q2e

d. What kinds of changes or corrections did respondents make? What did they say to explain these changes?

e. Did respondents think there were any mistakes in the income amounts shown? If so, how did they react?

EXPENDITURE

Respondents were asked to give an amount for what they had spent in the last month.

- f. How easy or difficult did respondents find it to answer this question? If they found it difficult, why do you think that was?

- g. How much did respondents refer to the showcard when answering this question? Was there any confusion about what kind of spending should / should not be included?

- h. If possible, please give examples of **how** respondents decided on an answer to this question. For example, did they add up amounts for each item on the showcard? Or did they estimate their spending based on their income? Or did they take another approach?

SAVINGS AND DEBT

Respondents were asked to give amounts for withdrawals from savings, new savings, new debts and paying off existing debt.

- i. How easy or difficult did respondents find it to answer these question? Was there any confusion about what they were being asked? Please give examples.

- j. Were there types of saving or debt mentioned by respondents which were not covered by these questions? If so, what where these?

MARRIED AND COHABITING COUPLES

Where a respondent was living with a spouse or partner, we wanted both partners to answer these questions in the survey together if possible.

- k. Think about the couples you interviewed. Did any of them answer these questions together?

Yes, **most** / **all** of the couples I interviewed
Yes, **some** of the couples I interviewed
No, **none** of the couples I interviewed

- l. How easy or difficult was it to have both partners answering these questions together? What advice would you give to a new interviewer about how they can arrange this?

During the interview, respondents living with a spouse / partner were asked for their consent to include their income amounts when talking to both partners together.

- m. In your opinion, how well did respondents understand what was being asked of them here? What reasons were given for **not** consenting?

- n. How did respondents react to being asked to answer these questions together with their partner?

- o. In your opinion, was it useful to ask these questions to both partners together? For example, did they help each other give more accurate answers, or prompt each other about anything they'd forgotten?

GENERAL

- p. Did any respondents mention the amount of questions about financial information in this year's survey? What did they say? In particular, did any respondents say they were less likely to take part in the future because of the questions asked this year?

- q. Please add any further comments here about your experience with these questions or any other financial questions in the survey.

3. CAPI QUESTIONNAIRE

a. Did the order/flow of the modules work well?

Yes	☐	➡ Q3b
No	☐	➡ Q3c

b. What suggestions would you make to improve the order/flow?

c. Were there any specific questions that sample members found particularly sensitive/upsetting?

Yes	☐	➡ Q3d
No	☐	➡ Q3e

d. What reasons did they give?

e. Were there any particular areas of the questionnaire where the respondent seemed bored?

Yes

☐

➡ Q3f

No

➡ Q3g

f. Which areas were these? Why do you think they were bored?

g. Were there any particular areas of the questionnaire where the respondent seemed to particularly enjoy answering?

Yes

☐

➡ Q3h

No

➡ Q3i

h. Which areas were these? Why did you feel they enjoyed this in particular?

i. Were there any questions where you would have liked more information or guidance?

Yes

☐

➡ Q3j

No

➡ Q4a

j. What would have helped?

4. OTHER COMMENTS

- a. Please give any comments on the IP9 briefing: what did you like and what could be improved for next time? Was there anything you were unsure about from the briefing?

- b. Do you have any further comments you would like to make that have not already been covered on this form?

Thank you for taking the time to complete this form.

IP9 MRS Leaflet

This Understanding Society interview was conducted by:

Interviewer Name: _____

Interviewer No: _____

Date: _____

TNS is conducting this project as an 'MRS Company Partner', which can be verified by calling the MRS Freephone on 0500 39 69 99.

What is the Market Research Society?

The Market Research Society (MRS) is the professional body for market researchers. The MRS Code of Conduct regulates all market research activity in the UK, in compliance with Data Protection and Human Rights legislation.

Under the MRS Code of Conduct, you have the right:

- To know the purpose of the interview
- To know who is interviewing you: Interviewers always carry the MRS personal identification card to identify themselves, this gives the interviewer's name, photograph and organisation
- To end the interview at any point
- To know that any personal information provided will only be used for the purposes about which you have been told

The information that is collected is strictly controlled and used only for research purposes, so you can be assured that taking part in our interview will not result in any subsequent sales or promotional activities by third parties.

For more information on the Market Research Society, contact:

The Standards Manager, Market Research Society, 15 Northburgh Street, London EC1V 0JR Telephone: 020 7490 4911 email: codeline@mrs.org.uk or visit website www.mrs.org.uk

TNS is compliant with the following standards and legislation: The 1998

UK Data Protection Act, The Market Research Society (MRS) Code of Conduct, ISO 20252, ISO 9001 and ISO 27001.

IP9 Stable Contact Letter



Date: ____ / ____ / ____

Dear _____,

You may be aware that _____ participated in an important research project called *Understanding Society* last year. The study is concerned with how things change over time, and we are hoping to revisit everyone who participated last time, to see how their lives have changed or stayed the same.

Unfortunately, we have been unable to contact the person named above. They gave us your name as a contact in the event of any change in their circumstances, and we would be most grateful if you would let us know their current address and telephone number, wherever they are living now. You can call us on Freephone **0800 252 853**, email us at **contact@understandingsociety.ac.uk** or complete and return the reply slip below in the Freepost envelope provided – you do not need a stamp.

By giving us their name, address and telephone number you are not committing them to be interviewed. Taking part is entirely voluntary, though we very much hope to achieve an interview with everybody who has taken part previously, so that our results give an accurate picture of people's experiences. Once we have their new details, an interviewer will contact them and invite them to take part.

If you have any questions about the study, please visit **www.understandingsociety.ac.uk** or call us using the Freephone number above.

Thank you for your help.

Yours sincerely,

.....
Your Interviewer
Understanding Society

.....
Professor Michaela Benzeval
Director, *Understanding Society*

✂ -----

Please complete this reply slip using BLOCK CAPITALS

Name: _____

Address: _____

Postcode: _____

Telephone: _____

Serial:

--	--	--	--	--	--	--	--	--	--

Person number:

--	--

Please turn over

✂-----

Please return the completed reply slip in the enclosed Freepost envelope – you don't need a stamp if you post it in the UK.

If you have any queries about this reply slip, or about *Understanding Society*, please call Freephone **0800 252 853** or email **contact@understandingsociety.ac.uk**

Thank you.

IP9 Thank You Flyer

We need your help to answer these important questions...

How well are you managing financially these days?

How would you rate your local services?

What do you consider your national identity to be?

Does your health limit you a lot, a little or not at all?



Understanding
Society



Thank you for your help and participation in Understanding Society.

It is only by talking to the same people each year that we can build a picture of how lives are changing over time. This is why you are so valuable to the study.

The anonymous information you share is being used by social researchers, policy-makers in government, charities and other third sector organisations in the UK and around the world to shape and guide new policy.

Go online to find examples of how Understanding Society influences policy and features in the news:

www.understandingsociety.ac.uk/participants



Follow us on Twitter:

 @usociety

Like us on Facebook:

 Understanding Society -
UK Household Longitudinal Study

Tell us



What do you think of the mailings that are sent to you on behalf of Understanding Society? We would like to hear your feedback. Please email us contact@understandingsociety.ac.uk or call 0800 252 853

IP9 Tracing Letter GB



Date ____/____/____

Dear _____

This time last year we interviewed your household for *Understanding Society*. The study is concerned with how things change or stay the same over time – your participation can help us paint a unique picture of what the UK looks like today and how it is gradually changing.

We would very much like to interview you and your household again this year; however, I called today at the address your household was interviewed at last year and found that you now live elsewhere. I spoke to _____ who did not wish to give your new address or telephone number without your permission, but did agree to forward this letter to you on our behalf.

We would be most grateful if you would let us know your current address and telephone number, wherever you are living now. You can call us on Freephone **0800 252 853**, email us at **contact@understandingsociety.ac.uk** or complete and return the reply slip below in the Freepost envelope provided – you do not need a stamp.

By giving us your name, address and telephone number you are not committing yourself to be interviewed. Once you have confirmed your new details, an interviewer will contact you and invite you to take part. If you are willing, a convenient time for an interview can then be arranged.

The study is being conducted by researchers from the University of Essex, together with TNS BMRB. If you have any questions about the study, or would prefer not to be contacted again, please visit the special participants' website at **www.understandingsociety.ac.uk** or call us using the Freephone number above.

Thank you in advance for your help.

Yours sincerely,

.....
Your interviewer
Understanding Society

.....
Professor Michaela Benzeval
Director, *Understanding Society*

✂-----

Please complete this reply slip using BLOCK CAPITALS

Name: _____

Address: _____

Postcode: _____

Telephone: _____

Serial:

--	--	--	--	--	--	--	--	--	--

Person number:

--	--

Please turn over



Please return the completed reply slip in the enclosed Freepost envelope – you don't need a stamp if you post it in the UK.

If you have any queries about this reply slip, or about *Understanding Society*, please call Freephone **0800 252 853** or email **contact@understandingsociety.ac.uk**

Thank you.

IP9 Showcards

Understanding Society IP9

Showcards

Understanding Society

IP9

SHOW CARDS

Understanding Society IP9

Showcards

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SHOWCARD 1A

1. Single and never married or never in a legally recognised Civil Partnership
2. Married
3. A Civil Partner in a legally recognised Civil Partnership
4. Separated but legally married
5. Divorced
6. Widowed

SHOWCARD 1B

1. Husband / Wife
2. Partner / Cohabitee
3. Civil Partner
4. Natural son / daughter
5. Adopted son / daughter
6. Foster child
7. Stepson / stepdaughter
8. Son-in-law / daughter-in-law
9. Natural parent
10. Adoptive parent
11. Foster parent
12. Step-parent
13. Parent-in-law
14. Natural brother / sister
15. Half-brother / sister
16. Step-brother / sister
17. Adopted brother / sister
18. Foster brother / sister
19. Brother / Sister-in-law
20. Grand-child
21. Grand-parent
22. Cousin
23. Aunt / Uncle
24. Niece / Nephew
25. Other relative
26. Employee
27. Employer
28. Lodger / Boarder / Tenant
29. Landlord / Landlady
30. Other non-relative

SHOWCARD 3A

1. A fixed amount each month by standing order
2. A monthly bill (by direct debit or other means)
3. A quarterly bill (by direct debit or other means)
9. An annual bill (by direct debit or other means)
4. A pre-payment (key / card or token) meter
5. It's included in the rent
6. Frequent cash payments (i.e. more frequent than once a month)
7. Fuel Direct scheme or direct from benefits
8. Staywarm scheme
97. Other

SHOWCARD 3B (ENGLAND)

1. BAND A: up to £40,000
2. B: £40,001 - £52,000
3. C: £52,001 - £68,000
4. D: £68,001 - £88,000
5. E: £88,001 - £120,000
6. F: £120,001 - £160,000
7. G: £160,001 - £320,000
8. H: £320,001 +
9. Household accommodation not valued separately /
included in rent

SHOWCARD 3B (SCOTLAND)

1. BAND A: up to £27,000
2. B: £27,001 - £35,000
3. C: £35,001 - £45,000
4. D: £45,001 - £58,000
5. E: £58,001 - £80,000
6. F: £80,001 - £106,000
7. G: £106,001 - £212,000
8. H: £212,001 +
9. Household accommodation not valued separately /
included in rent

SHOWCARD 3B (WALES)

1. BAND A: up to £44,000
2. B: £44,001 - £65,000
3. C: £65,001 - £91,000
4. D: £91,001 - £123,000
5. E: £123,001 - £162,000
6. F: £162,001 - £223,000
7. G: £223,001 - £324,000
8. H: £324,001 – £424,000
10. I: £424,001 +
9. Household accommodation not valued separately /
included in rent

SHOWCARD 3C

1. Television set
2. DVD/Blu-Ray player
3. Deep freeze or fridge freezer (EXCLUDE: fridge only)
4. Washing machine
5. Tumble drier
6. Dish washer
7. Microwave oven
8. Landline telephone
9. Mobile telephone (anyone in household)
96. Or none of the above?

SHOWCARD 3D

1. Satellite dish
2. Cable TV
3. Freeview / Freesat / Other free digital service
4. Through a telephone line connection / broadband
5. Other

SHOWCARD 3E

1. Desktop computer
2. Laptop computer
3. Netbook computer
4. Tablet computer
5. Other
96. None of the above

SHOWCARD 3F

1. Home computer / Laptop / Netbook / Tablet computer
2. Digital Television
3. Mobile phone
4. Games console
5. Other

SHOWCARD 3G

1. I/We have this
2. I/We would like to have this but cannot afford this at
the moment
3. I/We do not want/need this at the moment
4. Does not apply

SHOWCARD 3H

1. Child(ren) has/have this
2. Child(ren) would like to have this but we cannot afford this at the moment
3. Child(ren) do not want / need this at the moment
4. Does not apply

SHOWCARD 3I

1. Child(ren) does/do this
2. Child(ren) would like to do this but we cannot afford
this at the moment
3. Child(ren) do not want/need to do this at the moment
4. Does not apply

SHOWCARD 3J

1. Child(ren) does/do this
2. Child(ren) would like to do this but we cannot afford this at the moment
3. Child(ren) do not want/need this at the moment
4. Does not apply/Child(ren) at primary school

SHOWCARD 3K

1. Child(ren) does/do this
2. Child(ren) would like to do this but we cannot afford this at the moment
3. Child(ren) do not want/need this at the moment
4. Does not apply/Child(ren) not at school

SHOWCARD 3L

1. Yes
2. No, do not have the money for this
3. No, this is not a priority on current income
4. No, health/disability prevents this
5. No, it is too much trouble/too tiring
6. No, there is no one to do this with or provide help
7. No, this is not something wanted
8. No, it is not relevant

SHOWCARD 3M

1. National Savings Certificates / National Savings Bonds (Capital, Income or Deposit)
2. Unit Trusts / Investment Trusts (excluding ISAs/PEPs)
3. Company stocks or shares, UK or foreign (excluding ISAs/PEPs)
97. Other investments (e.g. gilts, government or company bonds or securities, stock options)

SHOWCARD 3N

1. Up to 700cc (0.7 litre)
2. 701 to 1000cc (0.7 to 1 litre)
3. 1001 to 1300cc (1.0 to 1.3 litres)
4. 1301 to 1400cc (1.3 to 1.4 litres)
5. 1401 to 1500cc (1.4 to 1.5 litres)
6. 1501 to 1800cc (1.5 to 1.8 litres)
7. 1801 to 2000cc (1.8 to 2.0 litres)
8. 2001 to 2500cc (2.1 to 2.5 litres)
9. 2501 to 3000cc (2.5 to 3.0 litres)
10. 3001 and over (over 3 litres)

SHOWCARD 30

1. Petrol
2. Diesel
3. Compressed natural gas
4. Biofuel blends over 5% (includes E85 - 85% Ethanol)
5. Electric / battery
6. Liquefied petroleum gas (LPG)
7. Hybrid (petrol/electric)
97. Other type of fuel

SHOWCARD 6A

1. Self employed
2. In paid employment (full or part-time)
3. Unemployed
4. Retired
5. On maternity leave
6. Looking after family or home
7. Full-time student
8. Long-term sick or disabled
9. On a government training scheme
10. Unpaid worker in family business
11. Working in an apprenticeship
97. Doing something else

SHOWCARD 6B

1. Every day
2. Several times a week
3. Several times a month
4. Once a month
5. Less than once a month
6. Never use
7. No access at home, at work or elsewhere

SHOWCARD 7A

- | | |
|--|---|
| 1. University Higher Degree (e.g. MSc, PhD) | 10. Higher Grade |
| 2. First degree level qualification including foundation degrees, graduate membership of a professional Institute, PGCE | 11. Certificate of sixth year studies |
| 3. Diploma in higher education | 12. GCSE / O Level |
| 4. Teaching qualification (excluding PGCE) | 13. CSE |
| 5. Nursing or other medical qualification not yet mentioned | 14. Credit Standard Grade / Ordinary (O) Grade (National 5 / Intermediate 2) |
| 6. A Level | 17. General Standard Grade (National 4 / Intermediate 1) |
| 16. Advanced Higher / Scottish Baccalaureate | 18. Foundation Standard Grade (National 3 / Access 3) |
| 7. Welsh Baccalaureate | 15. Other school (inc. school leaving exam certificate or matriculation) |
| 8. International Baccalaureate | 96. None of the above |
| 9. AS Level | |

SHOWCARD 7B

1. Youth training certificate
2. Key Skills
3. Basic skills
4. Entry level qualifications (Wales)
5. Modern apprenticeship / trade apprenticeship
6. RSA / OCR / Clerical and commercial qualifications (e.g. typing / shorthand / book-keeping / commerce)
7. City and Guilds Certificate
8. GNVQ / GSVQ
9. NVQ / SVQ - Level 1 - 2
10. NVQ / SVQ - Level 3 - 5
11. HNC / HND
12. ONC / OND
13. BTEC / BEC / TEC / EdExcel / LQL
14. SCOTVEC, SCOTEC or SCOTBEC
15. Other vocational, technical or professional qualification
96. None of the above

SHOWCARD 9A

1. Get a full-time job
2. Stay at school or sixth-form college
3. Go to / stay in further education college
4. Go to university or higher education institution
5. Get a job and study (at the same time)
6. Get an apprenticeship
7. Do some other type of training
97. Do something else

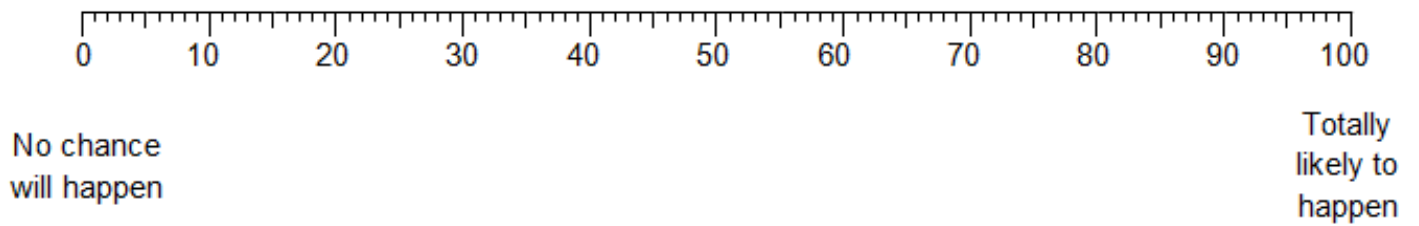
SHOWCARD 9B

1. Very important
2. Important
3. Not very important
4. Not at all important

SHOWCARD 10A

1. I am currently enrolled at a university
2. I have applied to university and I have secured a place
but I am not yet enrolled
3. I have applied to university and I still don't know
whether I will secure a place
4. I applied to university last year but I was not able to
secure a place
5. I applied to university and secured a place but chose
not to take the place up

SHOWCARD 10B



SHOWCARD 10C

- | | |
|--|--|
| 1. Less than £10,000 per year | 11. £55,000 to £59,999 per year |
| 2. £10,000 to £14,999 per year | 12. £60,000 to £64,999 per year |
| 3. £15,000 to £19,999 per year | 13. £65,000 to £69,999 per year |
| 4. £20,000 to £24,999 per year | 14. £70,000 to £74,999 per year |
| 5. £25,000 to £29,999 per year | 15. £75,000 to £79,999 per year |
| 6. £30,000 to £34,999 per year | 16. £80,000 to £84,999 per year |
| 7. £35,000 to £39,999 per year | 17. £85,000 to £89,999 per year |
| 8. £40,000 to £44,999 per year | 18. £90,000 to £94,999 per year |
| 9. £45,000 to £49,999 per year | 19. £95,000 to £99,999 per year |
| 10. £50,000 to £54,999 per year | 20. More than £100,000 per year |

SHOWCARD 12A

1. English
2. Welsh
3. Scottish
4. Northern Irish
5. British
6. Irish
97. Other

SHOWCARD 12B

White

1. British / English / Scottish / Welsh / Northern Irish
2. Irish
3. Gypsy or Irish Traveller
4. Any other White background

Mixed

5. White and Black Caribbean
6. White and Black African
7. White and Asian
8. Any other mixed background

Asian or Asian British

9. Indian
10. Pakistani
11. Bangladeshi
12. Chinese
13. Any other Asian background

Black / African / Caribbean / Black British

14. Caribbean
15. African
16. Any other Black background

Other Ethnic Group

17. Arab
97. Any other ethnic group

SHOWCARD 15A

1. Mobility (moving around at home and walking)
2. Lifting, carrying or moving objects
3. Manual dexterity (using your hands to carry out everyday tasks)
4. Continence (bladder and bowel control)
5. Hearing (apart from using a standard hearing aid)
6. Sight (apart from wearing standard glasses)
7. Communication or speech problems
8. Memory or ability to concentrate, learn or understand
9. Recognising when you are in physical danger
10. Your physical co-ordination (e.g. balance)
11. Difficulties with own personal care (e.g. getting dressed, taking a bath or shower)
12. Other health problem or disability
96. None of these

SHOWCARD 16A

- | | |
|---|---|
| 1. Asthma | 11. Chronic bronchitis |
| 2. Arthritis | 12. Any kind of liver condition |
| 3. Congestive heart failure | 13. Cancer or malignancy |
| 4. Coronary heart disease | 14. Diabetes |
| 5. Angina | 15. Epilepsy |
| 6. Heart attack or myocardial infarction | 16. High blood pressure |
| 7. Stroke | 17. Clinical depression |
| 8. Emphysema | 19. Multiple Sclerosis |
| 9. Hyperthyroidism or an over-active thyroid | 20. H.I.V. |
| 10. Hypothyroidism or an under-active thyroid | 18. Other long standing/chronic condition, please specify |
| | 96. None of these |

SHOWCARD 18A

27. Heterosexual / Straight

21. Gay / Lesbian

24. Bisexual

29. Other

SHOWCARD 21A

- | | |
|---|---|
| 1. Asthma | 11. Chronic bronchitis |
| 2. Arthritis | 12. Any kind of liver condition |
| 3. Congestive heart failure | 13. Cancer or malignancy |
| 4. Coronary heart disease | 14. Diabetes |
| 5. Angina | 15. Epilepsy |
| 6. Heart attack or myocardial infarction | 16. High blood pressure |
| 7. Stroke | 17. Clinical depression |
| 8. Emphysema | 19. Multiple Sclerosis |
| 9. Hyperthyroidism or an over-active thyroid | 20. H.I.V. |
| 10. Hypothyroidism or an under-active thyroid | 18. Other long standing/chronic condition, please specify |
| | 96. None of these |

SHOWCARD 23A

1. 1 - 2
2. 3 - 9
3. 10 - 24
4. 25 - 49
5. 50 - 99
6. 100 - 199
7. 200 - 499
8. 500 - 999
9. 1000 or more
10. Don't know but fewer than 25
11. Don't know but 25 or more

SHOWCARD 23B

1. A public limited company
2. A nationalised industry / state corporation
3. Central government or civil service
4. Local government or council (including police, fire services and local authority controlled schools / colleges)
5. A university or other grant-funded education establishment (include opted-out schools)
6. A health authority or NHS trust
7. A charity, voluntary organisation or trust
8. The armed forces
9. Some other kind of organisation

SHOWCARD 23C

The net pay included...

1. Income tax refund
2. Statutory sick pay
3. Statutory Maternity/Paternity pay
4. Statutory Adoptions pay
5. Mileage/Motoring allowance
6. Motoring expenses refund
97. Other reason

SHOWCARD 23D

1. There were no deductions for tax, pensions or National Insurance
2. Income tax refund was included
3. Statutory sick pay was included
4. Statutory Maternity/Paternity pay was included
5. Statutory Adoptions pay was included
6. Mileage/Motoring allowance was included
7. Motoring expenses refund was included
97. Other reason

SHOWCARD 23E

(England / Scotland / Wales)

1. Drive myself by car or van
2. Get a lift with someone from household
3. Get a lift with someone outside the household
4. Motorcycle/moped/scooter
5. Taxi/minicab
6. Bus/coach
7. Train
8. Underground/Metro/Tram/Light railway
9. Cycle
10. Walk
97. Other

SHOWCARD 23E (Northern Ireland)

1. Drive myself by car or van
2. Get a lift with someone from household
3. Get a lift with someone outside the household
4. Motorcycle/moped/scooter
5. Taxi/minicab
6. Bus/coach
7. Train
9. Cycle
10. Walk
97. Other

SHOWCARD 24A

1. 1 - 2
2. 3 - 9
3. 10 - 24
4. 25 - 49
5. 50 - 99
6. 100 - 199
7. 200 - 499
8. 500 - 999
9. 1000 or more
10. Don't know but fewer than 25
11. Don't know but 25 or more

SHOWCARD 24B

1. Less than £250
2. £250 to £499
3. £500 to £749
4. £750 to £999
5. £1,000 to £1,249
6. £1,250 to £1,499
7. £1,500 to £1,749
8. £1,750 to £1,999
9. £2,000 to £2,499
10. £2,500 to £2,999
11. £3,000 to £3,999
12. £4,000 to £4,999
13. £5,000 to £7,499
14. £7,500 to £9,999
15. £10,000 or more

SHOWCARD 24C

Money from the work account:

- used for payments to yourself and any other personal spending
- used to pay domestic bills (including standing orders)
- transferred to a private account
- used for any other non-business use?

SHOWCARD 24D

(England / Scotland / Wales)

1. Drive myself by car or van
2. Get a lift with someone from household
3. Get a lift with someone outside the household
4. Motorcycle/moped/scooter
5. Taxi/minicab
6. Bus/coach
7. Train
8. Underground/Metro/Tram/Light railway
9. Cycle
10. Walk
97. Other

SHOWCARD 24D (Northern Ireland)

1. Drive myself by car or van
2. Get a lift with someone from household
3. Get a lift with someone outside the household
4. Motorcycle/moped/scooter
5. Taxi/minicab
6. Bus/coach
7. Train
9. Cycle
10. Walk
97. Other

SHOWCARD 25A

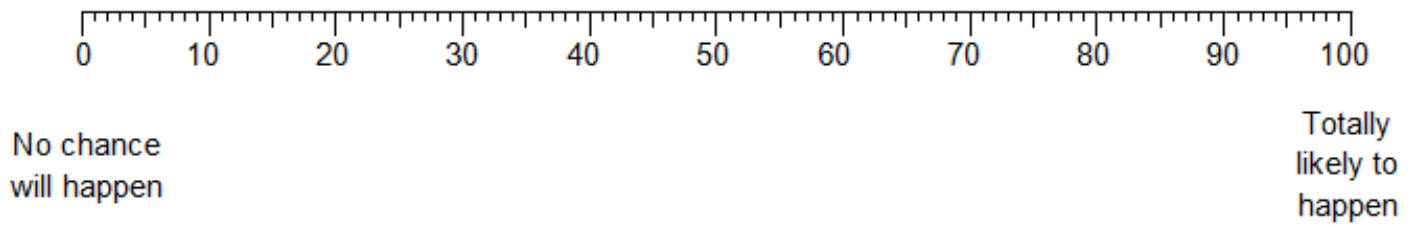
1. 1 - 2
2. 3 - 9
3. 10 - 24
4. 25 - 49
5. 50 - 99
6. 100 - 199
7. 200 - 499
8. 500 - 999
9. 1000 or more
10. Don't know but fewer than 25
11. Don't know but 25 or more

SHOWCARD 27A

7. Full-time student

1. Self-employed
2. In paid employment (full or part-time)
3. Unemployed
5. On maternity leave
6. Looking after the family or home
8. Long-term sick or disabled
9. On a government training scheme
10. Unpaid worker in a family business
11. Working in an apprenticeship
97. Doing something else

SHOWCARD 27B



SHOWCARD 27C

- | | |
|---------------------------------|---------------------------------|
| 1. Less than £10,000 per year | 11. £55,000 to £59,999 per year |
| 2. £10,000 to £14,999 per year | 12. £60,000 to £64,999 per year |
| 3. £15,000 to £19,999 per year | 13. £65,000 to £69,999 per year |
| 4. £20,000 to £24,999 per year | 14. £70,000 to £74,999 per year |
| 5. £25,000 to £29,999 per year | 15. £75,000 to £79,999 per year |
| 6. £30,000 to £34,999 per year | 16. £80,000 to £84,999 per year |
| 7. £35,000 to £39,999 per year | 17. £85,000 to £89,999 per year |
| 8. £40,000 to £44,999 per year | 18. £90,000 to £94,999 per year |
| 9. £45,000 to £49,999 per year | 19. £95,000 to £99,999 per year |
| 10. £50,000 to £54,999 per year | 20. More than £100,000 per year |

SHOWCARD 28A

1. Income Support
2. Job Seeker's Allowance
3. Child Benefit
4. Universal Credit
96. None of these

SHOWCARD 28B

1. NI Pension or State Retirement (Old Age) Pension
2. A pension from a previous employer
3. A pension from a spouse's previous employer
4. Pension Credit including Guarantee Credit &
Savings Credit
5. Private Pension or Annuity
6. Widow's or War Widow's Pension
7. Widowed Mother's Allowance, Parent's Allowance
or Bereavement Allowance
8. War Disablement Pension
96. None of these

SHOWCARD 28C

1. Incapacity Benefit
2. Employment and Support Allowance
3. Severe Disablement Allowance
4. Carer's Allowance
5. Disability Living Allowance
12. Personal Independence Payments
7. Attendance Allowance
8. Industrial Injury Disablement Benefit
10. Sickness and Accident Insurance
95. I receive one or more disability benefit(s), but not sure which one(s)
97. Any other disability related benefit or payment
96. None of these

SHOWCARD 28D

Version A

1. Foster Allowance
2. Maternity Allowance
3. In-Work Credit for Lone Parents
4. Return to Work Credit
6. Council Tax Reduction
97. Any other state benefit or credit
96. None of these

SHOWCARD 28D

Version B

1. Foster Allowance
2. Maternity Allowance
3. In-Work Credit for Lone Parents
4. Return to Work Credit
5. Working Tax Credit
6. Council Tax Reduction
8. Housing Benefit
97. Any other state benefit or credit
96. None of these

SHOWCARD 28D

Version C

1. Foster Allowance
2. Maternity Allowance
3. In-Work Credit for Lone Parents
4. Return to Work Credit
7. Rate Rebate
97. Any other state benefit or credit
96. None of these

SHOWCARD 28D

Version D

1. Foster Allowance
2. Maternity Allowance
3. In-Work Credit for Lone Parents
4. Return to Work Credit
5. Working Tax Credit
7. Rate Rebate
9. Rent Rebate
97. Any other state benefit or credit
96. None of these

SHOWCARD 28E

- 2. Education Grant other than a Student Loan or Tuition Fee Loan
- 9. Government Training Schemes, such as Youth Training Allowance
- 10. Regular payments from friends or relatives outside the house
- 11. Child maintenance, alimony or separation allowance
- 3. Trade Union or Friendly Society Payment
- 6. Rent from Boarders or Lodgers (not family members) living here with you
- 7. Rent from any other property even if that only covers that property's mortgage or running costs
- 96. None of these

SHOWCARD 28F

- 12. Royalties e.g. from land, books or performances
- 13. An occupational pension from an overseas government or company, paid in foreign currency
- 14. Grants from Social fund or Community Care grant from DWP or local authority; including funeral payment; health in pregnancy grant
- 15. An annuity (includes home income plan or equity release)
- 16. Income as a sleeping partner in a business
- 97. Any other regular payment
- 96. None of these

SHOWCARD 29A

1. Money Dashboard
2. OnTrees
3. Yodlee Money Center
4. Lovemoney
5. Moneydance
6. PocketSmith
7. AceMoney
97. Other
96. None of the above

SHOWCARD 29B

1. Tesco Clubcard
2. Nectar Card
3. myWaitrose Card
4. Morrisons Match & More Card
5. The Co-operative Card
6. my John Lewis Card
7. Ikea family Card
8. Boots Advantage Card
9. Nando's Card
10. Costa Coffee Club Card
11. Starbucks Card
12. British Airways Executive Club Card
13. Virgin Atlantic Flying Club Card
97. Other
96. No store loyalty cards

SHOWCARD 51A

1. Self employed
2. In paid employment (full or part-time)
3. Unemployed
4. Retired
5. On maternity leave
6. Looking after family or home
7. Full-time student
8. Long-term sick or disabled
9. On a government training scheme
10. Unpaid worker in family business
11. Working in an apprenticeship
97. Doing something else

SHOWCARD 51B

1. University Higher Degree (e.g. MSc, PhD)

2. First degree level qualification including foundation degrees, graduate membership of a professional Institute, PGCE

3. Diploma in higher education

4. Teaching qualification (excluding PGCE)

5. Nursing or other medical qualification not yet mentioned

6. A Level

16. Advanced Higher / Scottish Baccalaureate

7. Welsh Baccalaureate

8. International Baccalaureate

9. AS Level

10. Higher Grade

11. Certificate of sixth year studies

12. GCSE / O Level

13. CSE

14. Credit Standard Grade / Ordinary (O) Grade (National 5 / Intermediate 2)

17. General Standard Grade (National 4 / Intermediate 1)

18. Foundation Standard Grade (National 3 / Access 3)

15. Other school (inc. school leaving exam certificate or matriculation)

96. None of the above

SHOWCARD 51C

1. Youth training certificate
2. Key skills
3. Basic skills
4. Entry level qualifications (Wales)
5. Modern apprenticeship/trade apprenticeship
6. RSA/OCR/Clerical and commercial qualifications
(e.g. typing/shorthand/book-keeping/commerce)
7. City and Guilds Certificate
8. GNVQ/GSVQ
9. NVQ/SVQ - Level 1 – 2
10. NVQ/SVQ - Level 3 – 5
11. HNC/HND
12. ONC/OND
13. BTEC/BEC/TEC/EdExcel/LQL
14. SCOTVEC, SCOTEC or SCOTBEC
15. Other vocational, technical or professional
qualification
96. None of the above

SHOWCARD 51D

- 1.** Mobility (moving around at home and walking)
- 2.** Lifting, carrying or moving objects
- 3.** Manual dexterity (using your hands to carry out everyday tasks)
- 4.** Continence (bladder and bowel control)
- 5.** Hearing (apart from using a standard hearing aid)
- 6.** Sight (apart from wearing standard glasses)
- 7.** Communication or speech problems
- 8.** Memory or ability to concentrate, learn or understand
- 9.** Recognising when you are in physical danger
- 10.** Your physical co-ordination (e.g. balance)
- 11.** Difficulties with own personal care (e.g. getting dressed, taking a bath or shower)
- 12.** Other health problem or disability
- 96.** None of these

SHOWCARD 51E

1. 1 - 2
2. 3 - 9
3. 10 - 24
4. 25 - 49
5. 50 - 99
6. 100 - 199
7. 200 - 499
8. 500 - 999
9. 1000 or more
10. Don't know but fewer than 25
11. Don't know but 25 or more

SHOWCARD 51F

WEEKLY

0. NO INCOME AT ALL

1. up to 99

2. 100 - 149

3. 150 - 239

4. 240 - 319

5. 320 - 379

6. 380 - 459

7. 460 - 559

8. 560 - 669

9. 670 - 859

10. 860 or more

ANNUAL

0. NO INCOME AT ALL

1. up to 5,199

2. 5,200 - 7,799

3. 7,800 - 12,499

4. 12,500 - 16,599

5. 16,600 - 19,999

6. 20,000 - 23,999

7. 24,000 - 29,999

8. 30,000 - 34,999

9. 35,000 - 44,999

10. 45,000 - 54,999

11. 55,000 or more

SHOWCARD 51G

1. NI Retirement/State Retirement (old age) Pension
2. Pension from previous employer(s)
13. Universal Credit
3. Disability Living Allowance
4. Job Seekers Allowance (Unemployment) and/or Income Support
5. Employment and Support Allowance
6. Child Benefit
7. Working Tax Credit (formerly Working Family Tax Credit and Disabled Person's Tax Credit)
8. Housing Benefit/Rent Rebate
9. Incapacity Benefit (Replaces Invalidity and NI Sickness Benefit)
10. Any other state benefit
11. Child Tax Credit
12. Pension Credit
96. None of these

SHOWCARD 51H

WEEKLY

0. NO INCOME AT ALL

1. up to 74

2. 75 - 139

3. 140 - 199

4. 200 - 249

5. 250 - 324

6. 325 - 399

7. 400 - 499

8. 500 - 624

9. 625 - 749

10. 750 or more

ANNUAL

0. NO INCOME AT ALL

1. up to 3,599

2. 3,600 - 6,599

3. 6,600 - 9,599

4. 9,600 - 12,599

5. 12,600 - 15,599

6. 15,600 - 19,199

7. 19,200 - 23,999

8. 24,000 - 29,999

9. 30,000 - 35,999

10. 36,000 - 42,999

11. 43,000 - 49,999

12. 50,000 or more

SHOWCARD 52A

1. We share and manage our finances jointly
2. We pool some of the money and keep the rest separate
3. We keep our finances completely separate
4. One person looks after the couple's money except the other person's spending money
5. One person is given a housekeeping allowance, the other person looks after the rest of the money
6. We have some other arrangement

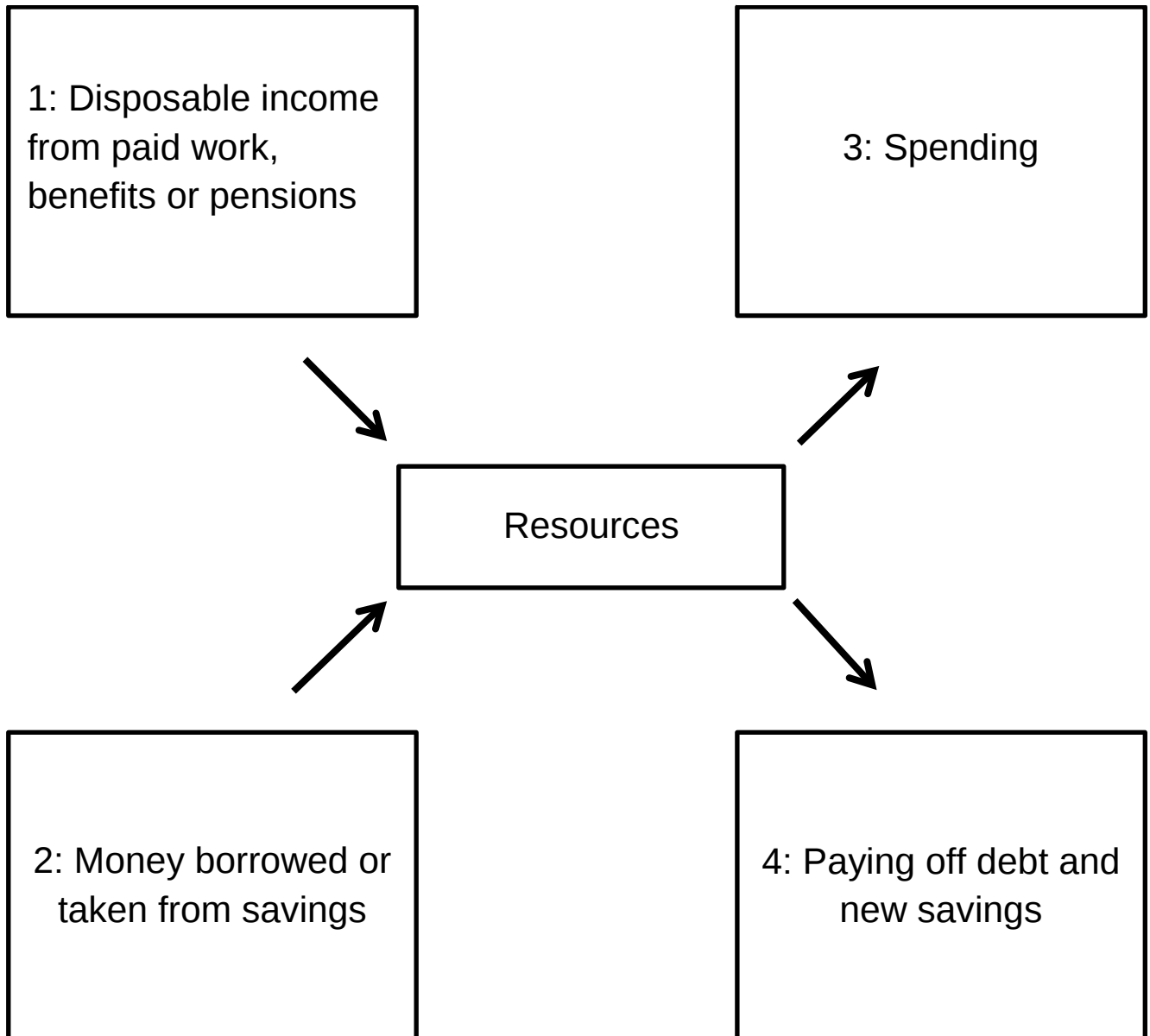
SHOWCARD 52B

1. Usually have nothing to pay
2. Usually pay the full amount owing
3. Usually pay more than the minimum amount but not the full amount owing
4. Usually pay the minimum amount on some cards and pay more on others
5. Usually pay the minimum amount only
6. Sometimes not able to pay the minimum amount
7. Some other arrangement / it depends on the card / a mix of these arrangements

SHOWCARD 52C

Incoming Money

Outgoing Money



SHOWCARD 52D

PLEASE DO NOT INCLUDE

- Money withdrawn from debit cards

PLEASE INCLUDE

Money taken from savings

- Savings or deposit accounts (with a bank, post office or building society)
- National Savings Accounts (Formerly National Savings Bank or Post Office Accounts)
- Cash ISA (Individual Savings Accounts)
- Stocks and Shares ISA (Individual Savings Accounts; formerly PEPs)
- Premium Bonds
- Children's savings accounts

Money borrowed

- Hire purchase agreements
- Credit cards, store cards
- Personal loans (from a bank, building society or other financial institution)
- Loans from a private individual (including family/friends)
- Catalogue or mail order purchase agreements
- DWP/SSA Social Fund Loans
- Overdrafts
- Student loans

SHOWCARD 52E

PLEASE DO NOT INCLUDE

- Regular Mortgage or rent payments
- Pension payments
- Student loan repayments

PLEASE INCLUDE

Money put into savings

- Savings or deposit accounts (with a bank, post office or building society)
- National Savings Accounts (Formerly National Savings Bank or Post Office Accounts)
- Cash ISA (Individual Savings Accounts)
- Stocks and shares ISA (Individual Savings Accounts; formerly PEPs)
- Premium Bonds
- Children's savings accounts

Money put into investments

- National Savings Certificates/National Savings Bonds (Capital, Income or Deposit)
- Unit Trusts/Investment Trusts
- Company stocks or shares, UK or foreign
- Other investments (e.g. gilts, government or company bonds or securities, stock options)

Money repaid on debts

- Hire purchase agreements
- Credit cards, store cards
- Personal loans (from a bank, building society or other financial institution)
- Loans from a private individual (including family/friends)
- Catalogue or mail order purchase agreements
- DWP/SSA Social Fund Loans
- Overdrafts

SHOWCARD 52F

PLEASE DO NOT INCLUDE

- **Work expenses** that are reimbursed
- Money you put into **savings, investments or pensions**
- Repaying **bank loans, debts, student loans, credit cards**

PLEASE INCLUDE

Essentials

- Regular **Mortgage or rent** repayments
- **Bills** e.g. gas, electricity, water, council tax, telephone, internet, TV, mobile and household insurance
- **Transport costs** e.g. running a car (petrol, tax, insurance) and public transport costs
- **Food and groceries**
- **Clothes and footwear**
- **Child costs** e.g. childcare, school equipment, fees
- **Home improvements and household goods** e.g. DIY, gardening, furniture, white goods or electrical goods
- **Health expenses** e.g. glasses, dental care, prescriptions, social care

Leisure

- **Socialising and hobbies** e.g. going out (restaurants, pub, cinema, theatre, concert), gym or club membership, arts and crafts, children's activities
- **Other treats** e.g. books, magazines, DVDs, CDs, games, toys, beauty products
- **Holidays**
- **Giving money or gifts to other people** e.g. money for children, gifts or money for relatives, donations to charity

SHOWCARD 52G

PLEASE DO NOT INCLUDE

- **Work expenses** that are reimbursed
- Money you put into **savings, investments or pensions**
- Repaying **bank loans, debts, student loans, credit cards**

PLEASE INCLUDE

Essentials

- Regular **Mortgage or rent** repayments
- **Bills** e.g. gas, electricity, water, council tax, telephone, internet, TV, mobile and household insurance
- **Transport costs** e.g. running a car (petrol, tax, insurance) and public transport costs
- **Food and groceries**
- **Clothes and footwear**
- **Child costs** e.g. childcare, school equipment, fees
- **Home improvements and household goods** e.g. DIY, gardening, furniture, white goods or electrical goods
- **Health expenses** e.g. glasses, dental care, prescriptions, social care

Leisure

- **Socialising and hobbies** e.g. going out (restaurants, pub, cinema), gym or club membership, arts and crafts, children's activities
- **Other treats** e.g. Books, magazines, DVDs, CDs, games, toys, beauty products
- **Holidays**
- **Giving money or gifts to other people** e.g. money for children, gifts or money for relatives, donations to charity

SHOWCARD 52H

1. Current account
2. Savings account
3. ISAs
4. Other stocks/bonds/investment
96. None of these

SHOWCARD 52I

1. Credit card
2. Store card (not loyalty cards)
3. Personal loans (including from family and friends)
4. Pay-day loans
96. None of these