

UK Data Archive Study Number 5291 - Family Resources Survey, 2004-2005

INFORMATION DIRECTORATE
STATISTICAL SERVICES
INCOMES MONITORING 1

FAMILY RESOURCES SURVEY 2004-05

DATASET AND CHANGES SUMMARY

PUBLIC RELEASE

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INTRODUCTION

This summary report is produced in conjunction with the 2004-05 Family Resources Survey (FRS).

The report provides a summary on proposed changes to:

- Dataset structure
- Variables
- Treatment within Processing (validation, editing and derivation of variables)
- Methodology

Further detailed information on all changes, and accompanying documentation and metadata for the 2004-05 survey, is available through the FRS Link Page. The dataset is also available if required.

Key milestones for the development of the 2004-05 dataset are provided below:

Release of <i>full-year test</i> dataset	5 September 2005
Presentation to users	13 September 2005
Initial user comments on changes	19 September 2005
End of testing period & final comments	13 October 2005
Restricted Release of 2004-05 dataset	21 November 2005
Public Release of 2004-05 dataset	30 March 2006

If you would like to discuss any issues or require further information or clarification, please contact one of the FRS team in Incomes Monitoring 1.

Summary of Changes

DATA STRUCTURE

There are no major structural changes being made to the FRS dataset in 2004-05; although to increase the level of consistency when collecting monetary amounts within the FRS, all monetary amounts are now collected to 2 decimal places.

CHANGES IN QUESTIONS

Deprivation

1. INTRODUCTION OF DEPRIVATION QUESTIONS

The most significant change to the FRS questionnaire this year is the introduction of a new suite of deprivation questions, which have replaced the questions previously asked about Consumer Durables.

The new questions examine a large number of items that can be associated with standard of living, covering:

- ability to afford a number of items that most other people agree families ought to have;
- their other 'unmet needs'; and
- whether they are managing their money and staying clear of problem debts - that is debts they cannot repay and are 'getting behind' with the repayments.

No single one of these items is a very adequate measure, but taken together they should allow analysts to produce a sensitive measure of family material well-being or hardship.

There are three groups of questions within the deprivation block; Adult Deprivation, Child Deprivation and Debt. The questions apply to the relevant people within each Benefit Unit.

Initial analysis of this information is being led by analysts in the Family, Poverty and Work division (**FPWD**); if you have an interest in this area please contact one of the FRS team in Incomes Monitoring 1.

Disability

2. DISABILITY QUESTIONS IN FRS

The FRS uses the Disability Discrimination Act (**DDA**) definition as the basis for questions on disability. To bring the survey further in line with the definition there have been three changes incorporated for 2004-05:

- (i) Extension in categories to record difficulty with physical co-ordination;
- (ii) Refinement in wording used to be in line with DDA;
- (iii) New question introduced to allow estimates to reflect the DDA requirement, that treatment should be ignored and the impairment is taken to have the effect it would have had without such treatment.

Benefits and Tax Credits

3. TAX CREDIT AWARDS

Working Tax Credit (**WTC**) and Child Tax Credit (**CTC**) have now fully replaced Working Families' Tax Credit (**WFTC**) and Disabled Person's Tax Credit (**DPTC**).

Questions on year for which the New Tax Credit award apply have been updated to reflect the option of submitting 2003-04 financial year information to HM Revenue and Customs (HMRC).

Note: Information is collected on whether an award was based on 2001-02 income, however, due to a questionnaire error there is no information collected on the income level in 2001-02.

4. NEW DEAL FOR 50 PLUS AND DISABLED PEOPLE

The questions on the government schemes for employment training have been extended and new categories were introduced to include New Deal 50+ and New Deal for Disabled People.

5. CHILD MAINTENANCE PREMIUM

Child Support Reforms were introduced in March 2003 to alter the way maintenance is calculated, although the reforms **ONLY** apply for new cases since then. The new system is called the 'Child Maintenance Premium' and questions on benefit have been updated to reflect this change.

6. NEW BENEFIT & PILOT SCHEMES

A number of measures mentioned in the 2003 budget have been introduced in certain pilot areas. These Benefit Pilot schemes include a 'Work Search Premium', a new 'In-Work Credit' available for lone parents and a 'Return to work Credit' for disabled people. These are all included within the FRS questionnaire.

Assets and Accounts

7. ENDOWMENT POLICY NOT LINKED

A new category is introduced to capture the information on endowments NOT linked to respondent's current property, but linked to 'old property', which are still held due to a decline in their value.

8. CREDIT UNIONS

A credit union is a financial co-operative similar in many respects to mainstream building societies. Since credit unions have increased in popularity, information is now collected on credit unions within the **Accounts and Assets** block of the questionnaire as a separate category.

9. TAX ON TESSAS

The FRS no longer asks the question, on interest paid on a TESSA, as these are exempt from tax and therefore the question does not apply.

10. INVESTMENT COMPANIES WITH VARIABLE CAPITAL

A new type of investment, Investment Companies with Variable Capital (**ICVC**), has been included in the FRS questionnaire under Unit Trusts and Investment Trusts.

Components of Pay

11. PATERNITY / ADOPTION PAY

Questions on the components of pay have been extended to include 'Statutory Paternity Pay' (**SPP**) and 'Statutory Adoption Pay' (**SAP**).

Tenancy

12. TENANCY ARRANGEMENTS

Three new tenancy questions have been introduced to bring the FRS in line with the Survey of English Housing (SEH) and to reflect the different tenancy agreements between England/Wales, Scotland and Northern Ireland. There are variations to the order, wording and routing of the tenancy questions between England/Wales, Scotland and Northern Ireland due to the differences in tenancy law between countries.

Rent

13. HOUSING BENEFIT

Up until now the FRS questionnaire has asked for the number of weeks the respondent has been receiving Housing Benefit. However, in many cases respondents will have received Housing Benefit for more than a year and will refer to the time in these terms rather than in weeks. To address this, a follow up question has been introduced to record the number of years, followed by the number of weeks, if less than 2 years.

Mortgage

14. REPAYMENT OF ORIGINAL LOAN

An additional category is added to the FRS questionnaire for Interest Only Mortgages to cover those respondents who have an interest only mortgage and have not made provision to pay off the original capital; and were relying on the sale of their house to cover this.

Childcare

15. CHILDCARE PROVIDED BY RELATIVES

Extra guidance has been added to the questions on childcare to clarify exactly who is being asked this question and whether to include childcare provided by relatives (such as grandparents and other family members). Clarification has also been added to define paid and unpaid childcare more clearly.

16. REMOVAL OF CONSUMER DURABLES

Information on Consumer Durables has been dropped and replaced by new questions covering deprivation. However, information about black and white, colour televisions and concessionary TV licences is still collected.

Question rotation

17. QUESTIONS ROTATED ON FOR 2004-05

Travel to Work is rotated on

18. QUESTIONS ROTATED OFF FOR 2004-05

Vehicle ownership and NHS treatment are rotated off.

19. TRAVELLING TO WORK BY TAXI

The travel to work question block has been updated to collect costs for all modes of transport, including taxi journeys.

Other Changes

20. SINGLE – SEX COUPLES

A new harmonised question was added to the questionnaire last year to help estimate the proportion of same sex couples. This question has now been extended to cross-reference the relationships entered in the Household Grid.

Education

21. EDUCATION TYPE

A new category 'Home Schooling' has been added to this question for classification of Education Types.

22. ROUTING ON WINTER FUEL PAYMENT

The questionnaire routing for Winter Fuel payments has now been altered so that the question is only asked of people aged 60 or older.

23. THIRD PARTY DEDUCTIONS

This is the new name for what was previously called the 'Direct Payment Scheme', which was set up to deduct a set amount of money from peoples' Income Support or Job Seekers Allowance and paid directly to a third party to cover mortgage interest and housing costs, fuel costs, water charges and council taxes.

24. NEW ACORN CODING

A new version of the **ACORN** code was introduced from June 2004. This has been added onto the dataset alongside the previous version which is included on the dataset for the whole year. The old codes are delivered under the existing **ACORN** variable with new codes are recorded as a new variable called **ACORNEW**.

TREATMENT WITHIN PROCESSING

Changes in the information collected and structure of that information needs to be taken into account within the processing of the FRS dataset. Most of these changes can be treated by introducing new systems or through extending our current methodologies, and are outlined in this section across the four processing areas;

- **Derived Variables**
- **Non-Benefit Editing**
- **Benefit Editing**
- **Imputation**

DERIVED VARIABLES

DISABILITY DISCRIMINATION ACT (DDA)

The FRS uses the Disability Discrimination Act definition as the basis for questions on disability. There have been a few extensions to the disability questions, so as to keep it in line with the updated definition. New follow up questions and new categories were introduced to ensure that the information provided by the FRS is robust.

STATUTORY PATERNITY AND ADOPTION PAY

Income from ‘Statutory Paternity Pay’ and ‘Statutory Adoption Pay’ has been treated in the same way as income from Statutory Maternity Pay and Statutory Sick Pay.

These benefits have also been included with ‘Other Income’ and ‘non-income related benefit’ flag.

TRAINING ALLOWANCES

The new categories for government training schemes have been included with other such employment training within the employment status derived variables.

IN WORK BENEFITS

Income from ‘Work Search Premium’, ‘In-Work Credit’ and ‘Return to work Credit’ have been included with ‘Other Income’ derived variables.

These benefits have also been added to the relevant income and non-income related benefit flag.

ADDITIONAL ACCOUNTS / ASSETS HELD

Membership of “Credit Unions” and “Endowments not linked to Property” have been recorded as with other account types.

Income from Credit Unions has been included within the Net and Gross Investment Income derived variables.

TRAVEL TO WORK COSTS

Derived variables on travel to work costs and mode have been rotated onto the dataset.

TAX CREDITS

Inclusion of income from **WFTC** and **DPTC** has been removed from the Tax Credit derived variables.

NON-BENEFIT EDITING

There have been no changes to non-benefit editing due to changes in the 2004-05 data. However, we have introduced two checks to validate the data against the metadata. For details please see the main changes documentation.

BENEFIT EDITING

WINTER FUEL PAYMENTS FOR THE OVER 70s

The extra £100 one off payment for over 70s is paid automatically as part of the Winter Fuel Payment and is included in the benefit imputation for all over 70 cases in 2004-05.

STATE SUPPORT PILOTS

Three new types of State Support have been introduced onto the dataset. They are Work-Search Premium, In-Work Credit and Return to Work Credit.

IMPUTATION

All the new variables have been considered for imputation. For a complete list of the new variables being imputed see the detailed changes document.

METHODOLOGY CHANGES

In some cases changes in information will require changes to the way we process and present data; there will also be instances where we identify the need for changes in response to user comment or from our own review of systems.

Details on the methodological changes we are proposing for 2004-05 are shown below under the area for which they are most applicable:

- **Derived Variables**
- **Non-Benefit Editing**
- **Benefit Editing**
- **Imputation**

DERIVED VARIABLES

FREE SCHOOL MEALS

Following an investigation, and consultation with users, it is recommended that the FRS and associated series should assign income to free school meals based on estimates from UNISON, for primary schools and for secondary schools, which is uprated by the RPI.

For the current survey year, 2004-05, this rate is:

	2004-05
Primary	£1.40
Secondary	£1.50

This rate will be used in the derivation of FRS income from 2004-05; applied as a point-in-time estimate. It is not proposed to adjust the back-series but this will be noted so users can make the adjustment if necessary.

See [‘Assigning Income to Free School Meals Recommendation for Change’](#) for full details.

ACCOUNTS AND ASSETS

- **Basic Accounts** were initially set-up to allow direct payment of benefits into Post Office or bank accounts. As savings are usually withdrawn immediately, this type of account has no other enhanced features and attracts the lowest interest rate compared to other types of accounts.
- **Credit Unions** are co-operative banking facilities usually found in rural communities or farming areas set-up with/using Government assistance. They are not controlled by the Financial Services Authority (FSA) but have their own regulatory body; ABCUL. Interest rates are dependant on the number of investment shareholders/customers and the amount of overall total investments made; interest is payable as a dividend at the end of each financial year.
- **Accounts** usage indicator has been changed, from Categorical (C) to Continuous (Q), for the accounts variables in the ADULT, BENUNIT and HOUSEHOL tables; as the DV records how many types of account/s appear within each of the tables.

INCOME FROM SELF-EMPLOYED

Gross earnings of a self-employed adult are uprated to current year prices in line with current labour market trends.

In the previous 2003-04 survey, the base rate of 100% was taken from January 1995; however, for the 2004-05 survey this has been updated to January 2000. Although there is a change in the base rate, and the constants generated are different, they remain in line with the 19.6% overall growth in the economy.

WATER CHARGES IN SCOTLAND

The three former water service providers for Scotland have all merged in 2004-05 to become “Scottish Water”. There is now no price differential according to a dwellings locale, but instead this is calculated in accordance with the LAC housing bands A-H.

CHILD BENEFIT ELIGIBILITY

In light of the new rules regarding eligibility to receive Child Benefit in 2006-07, a flag has been created to identify any adult within a household / benefit unit who may be affected by these changes:

- 19 year olds completing non-advanced education or training starting before they were 19 - up to an age limit of 20;
- unwaged trainees aged 16-18;
- 15 year old school-leavers in Scotland.

NON-BENEFIT EDITING

The following new credibility checks have been added to the standard FRS validation suite:

PURCHASE VALUE and BORROWED AMOUNT

To ensure purchase value and borrowed amount reconcile. The new check is designed to pick up any keying in errors, and looks at extreme cases where the amount borrowed is less than 10% of the original purchase value. It builds on an existing Credibility Check which looks at cases where the mortgage left is exceeded by either the amount borrowed or the re-mortgage amount.

LAST MONTH and YEAR of PAID WORK

To ensure that the last month and year of paid work is not outside the interview date. For these cases, the year or month are edited to the interview date details. Again, this complements an existing Credibility Check which picks up interview dates outside the survey year.

FREE HOUSING with JOB

To flag all cases where the household is entitled to free housing with their job, but do not have any employment record on the JOB table. Whilst the majority of these cases are fine, since the householder is entitled to continue living rent-free into their retirement; we have found a couple of erroneous cases. These cases are currently not edited.

GROSS WAGE/SALARY

To ensure gross wage/salary cannot be a zero, when deductions from gross wage/salary are greater than zero. This is not a plausible scenario, and so these cases have been edited using imputation.

SERVICE CHARGE AND INSURANCE PREMIUMS

The methodology used to edit cases that include both service charges and insurance premiums in the same insurance payment has been refined further.

ODDJOB

Income from babysitting and mail order agents has been refined and brought inline with income from all other oddjobs. Previously income from these two income sources was based on a four week period. This has now been weeklyised inline with other income data.

BENEFIT EDITING

BENEFIT EDITING FOR NEW TAX CREDITS

Some areas of WTC and CTC editing have been automated. This automation is based upon the editing principles established in 2003-04.

IMPUTATION

There have a couple of minor methodological changes to the imputation in 2004-05. See the detailed changes document.

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FAMILY RESOURCES SURVEY

2004-05

DATASET AND CHANGES

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INTRODUCTION

This report accompanies the public release for the 2004-05 Family Resources Survey(FRS) and provides users with detailed information on changes to:

- Dataset structure
- Variables
- Treatment within Processing (validation, editing and derivation of variables)
- Methodology

The information provided in this report should be used in conjunction with the standard FRS documentation available. In particular the following documents should be consulted:

- The Interviewers Guide to Changes
- Changes Metadata

A summary version of this report, providing an overview of changes, and a covering minute, providing information on the 2004-05 processing cycle and user consultation, are also available.

Key milestones for the development of the 2004-05 dataset are provided below.

Release of <i>full-year</i> test dataset	5 September 2005
Presentation to users	13 September 2005
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If you would like to discuss any issues or require further information or clarification, please contact one of the FRS team in Incomes Monitoring 1.

DATA STRUCTURE

There are no major structural changes being made to the FRS dataset in 2004-05; although to increase the level of consistency when collecting monetary amounts within the FRS, all monetary amounts are now collected to 2 decimal places.

OVERVIEW OF VARIABLE CHANGES

The variable changes are listed below with reference to the page in the **‘Interviewers Guide to Changes’** that provides more details.

Changes in the FRS data can affect three main areas of processing;

- Editing
- Imputation
- Derived variables

The tables below summarise for each change in the dataset for 2004-05 which areas have been affected. Full details on how these changes have been catered for are provided in the ‘Further details on changes’ section of this report.

Social Deprivation

1. INTRODUCTION OF DEPRIVATION QUESTIONS (Page 27)

The most significant change to the FRS questionnaire this year is the introduction of a new suite of deprivation questions, which have replaced the questions previously asked about Consumer Durables.

The new questions examine a large number of items that can be associated with standard of living, covering:

- ability to afford a number of items that most other people agree families ought to have;
- their other ‘unmet needs’; and
- whether they are managing their money and staying clear of problem debts - that is debts they cannot repay and are ‘getting behind’ with the repayments.

No single one of these items is a very adequate measure, but taken together they should allow analysts to produce a sensitive measure of family material well-being or hardship.

There are three groups of questions within the deprivation block; Adult Deprivation, Child Deprivation and Debt. The questions apply to the relevant people within each Benefit Unit.

New Variables		Editing	DVs	Imputation
ADDDEC	enough money to keep your home in a decent state of décor			
ADDEPLES	hobby or leisure activity			
ADDHOL	hols. away from home one week a year+ not staying with rels.			
ADDINS	household contents insurance			
ADDMEL	friends/family round for drink or meal at least once a month			
ADDMON	make savings of £10 a month or more			
ADDSHOE	two pairs of all weather shoes for each adult in household			
ADEPFUR	replace any worn out furniture			
AF1	replace or repair broken electrical goods			
AFDEP2	money to spend each week on yourself, not on your family			
HOUSHE1	are you able to keep this accommodation warm enough			
CDELPLY	outdoor space/facilities nearby where kids play in safety			
CDEPBED	enough bedrooms for every child over 10			
CDEPCEL	celebrations on special occasions			
CDEPEQP	leisure equipment such as sports equipment or a bicycle			
CDEPHOL	a holiday away from home at least 1 week a year with family			
CDEPLES	a hobby or leisure activity			
CDEPSUM	swimming at least once a month			
CDEPTEA	have friends round for tea or a snack once a fortnight			
CDEPTRP	go on a school trip at least once a term			
CPLAY	Go to a playgroup at least once a week			
DEBT1	Behind with the electricity bill			
DEBT2	Behind with the gas bill			
DEBT3	Behind with other fuel bills like coal or oil			
DEBT4	Behind with Council Tax			
DEBT5	Behind with insurance policies			
DEBT6	Behind with telephone bill			

DEBT7	Behind with television/video rental or HP			
DEBT8	Behind with other HP payments			
DEBT9	Behind with water rates/rates(NI)			

Initial analysis of this information is being led on by analysts in the Family, Poverty and Work Division (**FPWD**). If you have any interest in this area please contact one of the FRS team in Incomes Monitoring 1.

Disability

2. DISABILITY QUESTIONS (PAGE 39)

The FRS uses the Disability Discrimination Act (**DDA**) definition as the basis for questions on disability. To bring the survey further in line with the definition there have been three changes incorporated for 2004-05:

- (i) Extension in categories to record difficulty with physical co-ordination;
- (ii) Refinement in wording used to be in line with DDA;
- (iii) New question introduced to allow estimates to reflect the DDA requirement that treatment should be ignored and the impairment is taken to have the effect it would have had without such treatment.

New Variables		Editing	DVs	Imputation
DDATRE	Difficulties - Without medication		✓	✓
DISDIF9	Difficulty in Other area of life		✓	✓
CDDATRE	Difficulties - Without medication		✓	✓
CDISDIF9	Difficulty in Other area of life		✓	✓

Benefits and Tax Credits

3. TAX CREDIT (PAGE 45)

Working Tax Credit (**WTC**) and Child Tax Credit (**CTC**) have now fully replaced Working Families' Tax Credit (**WFTC**) and Disabled Person's Tax Credit (**DPTC**).

Questions on 'Year for which the New Tax Credit award applies?' have been updated to reflect the option of submitting 2003-04 financial year information to HM revenue and Customs (HMRC).

Note: Information is collected on whether an award was based on 2001-02 income, however, due to a questionnaire error there is no information collected on the income levels in 2001-02.

Labels Changes		Editing	DVs	Imputation
NTCDAT (1)	2004-05			✓
NTCDAT (2)	2003-04			✓
NTCDAT (3)	2001-02			✓
NTCDAT (4)	Not available - IS/JSA/MIG recipient			✓
TAXCRED1	In receipt: Working Tax Credit	✓	✓	✓
TAXCRED2	In receipt: Child Tax Credit	✓	✓	✓

Dropped Variables		Editing	DVs	Imputation
NTCAPP	Estimate of income provided for 2003-04			✓
NTCORIG1	Previously in receipt: Working Families Tax Credit			✓
NTCORIG2	Previously in receipt: Disabled Person's Tax Credit			✓
NTCORIG3	Previously in receipt: Children's tax credit (via PAYE)			✓
NTCORIG4	Previously in receipt: Income Support			✓
NTCORIG5	Previously in receipt: Job Seekers Allowance (Income Based)			✓
TAXCRED3	In receipt: Children's Tax Credit (April only)	✓		
TAXCRED4	In receipt: Working Tax Credit	✓	✓	✓
TAXCRED5	In receipt: Child Tax Credit	✓	✓	✓
TAXFUT	Awaiting outcome of claim: New Tax Credit			
WFTCBOTH	Most recent payment method for WFTC	✓		
WFTCLUM	In receipt: WFTC lump sum	✓		
DPTCBOTH	Most recent payment method for DPTC	✓		
DPTCLUM	In receipt: DPTC lump sum	✓		

4. NEW DEAL 50+ AND NEW DEAL FOR DISABLED PEOPLE (PAGE 40)

The questions on the government schemes for employment training have been extended and new categories were introduced to include New Deal 50+ and New Deal for Disabled People.

New Categories		Editing	DVs	Imputation
TRAIN (7)	New Deal 50+	✓	✓	
TRAIN (8)	New Deal for Disabled People	✓	✓	
NITRAIN (7)	New Deal 50+	✓	✓	

NITRAIN (8)	New Deal for Disabled People	✓	✓	
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5. CHILD MAINTENANCE PREMIUM (Page 40)

Child Support Reforms were introduced in March 2003 to alter the way maintenance is calculated, although the reforms ONLY apply for new cases since then. The new system is called the 'Child Maintenance Premium' and questions on benefit have been updated to reflect this change.

Labels Changes		Editing	DVs	Imputation
BEN5Q4	Rcpt last 6 months Child Maintenance Bonus/Premium	✓	✓	

6. BENEFIT PILOT SCHEMES (Page 40)

A number of measures mentioned in the 2003 Budget have been introduced in certain pilot areas. These Benefit Pilot schemes include a 'Work Search Premium', a new 'In-Work Credit', available for lone parents and a 'Return to Work Credit' for disabled people. These are all included within the FRS questionnaire.

New Categories		Editing	DVs	Imputation
BEN5Q7	Rcpt last 6m: In-work credit	✓	✓	
BEN5Q8	Rcpt last 6m: Return to work credit	✓	✓	
BEN5Q9	Rcpt last 6m: any other NI/State benefit	✓	✓	

Labels Changes		Editing	DVs	Imputation
BEN5Q6	Rcpt last 6m: Work-Search Premium	✓	✓	

Information on Benefit Pilot Schemes is mapped onto the BENEFITS, GOVPAY and PENAMT tables.

See '[2004-05 Benefits Map](#)' for more details.

New Categories		Editing	DVs	Imputation
BENEFIT=46	Rcpt last 6m: In-work credit	✓	✓	
BENEFIT=47	Rcpt last 6m: Return to work credit	✓	✓	
BENEFIT=45	Rcpt last 6m: Work-Search Premium	✓	✓	

Assets and Accounts

7. ENDOWMENT POLICY NOT LINKED (PAGE 52)

A new category is introduced to capture the information on endowments NOT linked to the respondent's current mortgage or property. The aim of this category is to capture those endowment policies that were taken out as a savings vehicle to repay a mortgage (an 'endowment mortgage') but no longer do so. This is where the mortgage has either been paid off or, more usually, converted to a different method of repayment. The respondent will have decided to retain the endowment as an investment in its own right, even though it is no longer intended to repay the mortgage. This category should also collect information on endowment policies that were never linked to mortgages.

On the **ASSETS** table the variable **HOWMUCHE** is used to record how much the endowment is worth. This is an Office Edit rather than an amount supplied by the respondent. It is calculated using the amount the respondent regularly pays and for how long they've held the endowment.

New Categories		Editing	DVs	Imputation
ACCOUNT=29	Endowment Policy Not Linked		✓	✓
ASSETYPE=29	Endowment Policy Not Linked		✓	✓

Information on Endowments is mapped onto the **ACCOUNTS and ASSETS** tables.

See '[2004-05 Account](#)' and '[2004-05 Assets](#)' for more details.

8. CREDIT UNIONS (PAGE 49)

A Credit Union is a financial co-operative similar in many respects to mainstream building societies. Since Credit Unions have increased in popularity, information is now collected on Credit Unions within the **Accounts and Assets** block of the questionnaire as a separate category.

New Categories		Editing	DVs	Imputation
ACCOUNT=28	Credit Union		✓	✓
ASSETYPE=28	Credit Union		✓	✓

Information on Credit Unions is mapped onto the **ACCOUNTS and ASSETS** tables.

See '[2004-05 Account](#)' and '[2004-05 Assets](#)' for more details.

9. TAX ON TESSAS (Page 48)

The FRS no longer asks questions on interest paid on a TESSA as these are exempt from tax and therefore the question does not apply.

10. INVESTMENT COMPANIES WITH VARIABLE CAPITAL (Page 51)

A new type of investment, Investment Companies with Variable Capital (ICVC), has been included in the FRS questionnaire under Unit Trusts and Investment Trusts.

Pay

11. PATERNITY AND ADOPTION PAY (Page 42)

Questions on the components of pay have been extended to include Statutory Paternity Pay' (SPP) and 'Statutory Adoption Pay' (SAP).

New Variables		Editing	DVs	Imputation
INCLPAY7	Last pay includes Statutory Paternity pay		✓	✓
INCLPAY8	Last pay includes Statutory Adoption pay		✓	✓
SAPAMT	Amount included in last wage for SAP		✓	✓
SPPAMT	Amount included in last wage for SPP		✓	✓
PAPERIOD	How many weeks is/was your employer paying SAP			✓
PPPERIOD	How many weeks is/was your employer paying SPP			✓
UINCPAY7	Usual pay includes Statutory Paternity pay		✓	✓
UINCPAY8	Usual pay includes Statutory Adoption pay		✓	✓
USPPAMT	Amount included in usual wage for SPP		✓	✓
USAPAMT	Amount included in usual wage for SAP		✓	✓

Tenancy

12. TENANCY ARRANGEMENTS (Page 15)

Three new tenancy questions have been introduced to bring the FRS in line with the Survey of English Housing (SEH) and to reflect the different tenancy agreements between England/Wales, Scotland and Northern Ireland. There are variations to the order, wording and routing of the tenancy questions between England/Wales, Scotland and Northern Ireland due to the differences in tenancy law between countries

New Variables		Editing	DVs	Imputation
LOWSHORT	Is this a low season let			✓
OTHTYPE	Whether accommodation let other way			✓
TENTYPE	Type of agreement			✓

Due to the introduction of new questions, some information is no longer routed through the old tenancy questions.

Dropped Variables		Editing	DVs	Imputation
OTHWAY	Whether accommodation let other way			✓
SHORT1	Type of agreement			✓
SHORT2	Type of agreement			✓

13. HOUSING BENEFIT (PAGE 22)

Up until now the FRS questionnaire has asked for the number of weeks the respondent has been receiving Housing Benefit (HBWeeks). However, in many cases, respondents will have received Housing Benefit for more than a year and will refer to the time in these terms rather than in weeks.

The wording of HBWeeks has been altered and a follow up question introduced (HBYears). We now record the number of years followed by the number of weeks, if less than 2 years, and map this information onto HBWeeks for all cases over two years.

New Variables		Editing	DVs	Imputation
HBYEARS	Number of years on HB (Banded)			✓

Labels Changes		Editing	DVs	Imputation
HBWEEKS	Number of weeks on HB (Banded over 2 years)			✓

Mortgage

14. REPAYMENT OF ORIGINAL LOAN (Page 23)

An additional category is added in the FRS questionnaire, on Interest only Mortgages, to cover those respondents who have an interest only mortgage and have not made provision to pay off the original capital and were relying on the sale of the house to cover this.

New Categories		Editing	DVs	Imputation
ENDWPRI5	Proceeds from house sale			✓

Childcare

15. CHILDCARE PROVIDED BY RELATIVES (Page 13)

Extra guidance has been added to the questions on childcare to clarify exactly who is being asked this question, and whether to include childcare provided by relatives (such as grandparents and other family members). Clarification has also been added to define paid and unpaid childcare more clearly.

16. REMOVAL OF CONSUMER DURABLES

Information on Consumer Durables has been dropped and replaced by new questions covering deprivation. However, the information about black and white and colour televisions and concessionary TV licences is still collected

Dropped Variables		Editing	DVs	Imputation
MODCON01 -014			✓	✓

Note: See '[Changes Metadata](#)' for a full list of variables

Dropped Variables		Editing	DVs	Imputation
CENTFUEL	Type of fuel used by central heating		✓	✓
CENTHEAT	Whether accomodation has central heating		✓	✓

Question rotation

17. QUESTIONS ROTATED ON FOR 2004-05

Travel to Work is rotated on

		Editing	DVs	Imputation
Travel to Work	Rotated on		✓	✓

Note: See '[Changes Metadata](#)' for a full list of variables

18. QUESTIONS ROTATED OFF FOR 2004-05

Vehicle ownership and NHS Treatment is rotated off.

		Editing	DVs	Imputation
Vehicle Ownership	Rotated off			✓
NHS Treatment	Rotated off			✓

Note: See '[Changes Metadata](#)' for a full list of variables

19. TRAVELLING TO WORK BY TAXI (PAGE 46)

The Travel to Work question has now been updated to collect costs for all modes of transport including taxi journeys.

Other Changes

20. SINGLE –SEX COUPLES (Page 13)

A new harmonised question was added to the questionnaire last year to help estimate the proportion of same sex couples. However, this question has now been extended to cross-reference the relationships entered in the Household Grid.

Education

21. EDUCATION TYPE (Page 13)

A new category ‘Home Schooling’ has been added to this question, on classification of Education Type.

New Categories		Editing	DVs	Imputation
TYPEED (10)	Home Schooling			

22. ROUTING ON WINTER FUEL PAYMENT (Page 47)

The question routing on Winter Fuel payments has now been altered so that the question is only asked of people aged 60 or older.

23. THIRD PARTY DEDUCTIONS

This is the new name for what was previously called the ‘Direct Payment Scheme’ which was set up to deduct a set amount of money from peoples’ Income Support or Job Seekers Allowance, and paid directly to a third party to cover mortgage interest and housing costs, fuel costs, water charges and council taxes.

24. NEW ACORN CODING

A new version of the **ACORN** code was introduced from June 2004. This has been added onto the dataset alongside the previous version which is now included on the dataset for the whole year.

The old codes are delivered under the existing **ACORN** variable with new codes being recorded as a new variable called **ACORNEW**.

New Variable		Editing	DVs	Imputation
ACORNEW	ACORN (New Version)			

TREATMENT WITHIN PROCESSING

Changes in the information collected and structure of that information needs to be taken into account within the processing of the FRS dataset. Most of these changes can be treated by introducing new systems or through extending our current methodologies, and are detailed in this section across the four processing areas;

- **Derived Variables**
- **Non-Benefit Editing**
- **Benefit Editing**
- **Imputation**

DERIVED VARIABLES

DISABILITY DISCRIMINATION ACT (DDA)

The changes and extensions in questions on **HEALTH** were implemented to bring the survey further into line with the **DDA** definition. Incorporating the extended categories fits within our current methodology; however, including cases which are now **DDA due to treatment being ignored** have required an extension in the current approach. This will also introduce a discontinuity into the current DDA series.

The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
DDATRE	Disability substantially limits ability	New	adDDA, chDDA
DISDIF9	Difficulty in Other area of life	New	adDDA, chDDA

This change has been incorporated at the Adult and Child level derived variables, and will feed through in all the DDA derived variables.

Derived Variable	Label	Table
adDDA	Whether adult has a DDA defined disability	ADULT
chDDA	Whether child has a DDA defined disability	CHILD

STATUTORY PATERNITY AND ADOPTION PAY

The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
INCLPAY7	Last pay includes Statutory Paternity pay	New	SSPSMPFG
INCLPAY8	Last pay includes Statutory Adoption pay	New	SSPSMPFG
PPPERIOD	How many weeks is/was your employer paying SPP?	New	SPPADJ, USPPAMT
PAPERIOD	How many weeks is/was your employer paying SAP?	New	SAPADJ, USAPAMT
SPPAMT	Amount included in last pay for SPP	New	SPPADJ (New DV)
SAPAMT	Amount included in last pay for SAP	New	SAPADJ (New DV)
UINCPAY7	Usual pay includes SPP	New	SSPSMPFG
UINCPAY8	Usual pay includes SAP	New	SSPSMPFG
USPPAMT	Amount included in usual pay for SPP	New	SPPADJ (New DV)
USAPAMT	Amount included in usual pay for SAP	New	SAPADJ (New DV)

Income from 'Statutory Paternity Pay' and 'Statutory Adoption Pay' has been treated in the same way as income from Statutory Maternity Pay and Statutory Sick Pay.

Derived Variable	Label	Table
SSPSMPFG	Adults with an SMP, SSP, SAP and SPP adjustment	JOB
SPPADJ	SPP amount	
SAPADJ	SAP amount	

These benefits have also been included with 'Other Income' and the 'non-income related benefit' flag.

Derived Variable	Label	Table
INNIRBEN	Non - income related benefits	ADULT
INOTHBEN	Other benefits	

TRAINING ALLOWANCES

The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
TRAIN (7)	New Deal 50+	New	EMPSTATB, EMPSTATC, EMPSTATI
TRAIN (8)	New Deal for Disabled People	New	EMPSTATB, EMPSTATC, EMPSTATI
NITRAIN (7)	New Deal 50+	New	EMPSTATB, EMPSTATC, EMPSTATI
NITRAIN (8)	New Deal for Disabled People	New	EMPSTATB, EMPSTATC, EMPSTATI

The new categories for government training schemes have been included with other such employment training within the employment status derived variables.

Derived Variable	Label	Table
EMPSTATB	Employment Status	ADULT
EMPSTATC	Employment status - HBAI definition	
EMPSTATI	Employment status – ILO definition	

IN WORK BENEFITS

The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
BENEFIT (45)	Work-Search Premium	New	INNIRBEN, INOTHBEN
BENEFIT (46)	In-work credit	New	INNIRBEN, INOTHBEN
BENEFIT (47)	Return to work credit	New	INIRBEN, INOTHBEN

Income from ‘Work Search Premium’, ‘In-Work Credit’ and ‘Return to Work Credit’ have been included with the ‘Other Income’ derived variables.

Derived Variable	Label	Table
INOTHBEN	Other benefits	ADULT

These benefits have also been added to the relevant income and non-income related benefit flags.

Derived Variable	Label	Table
INIRBEN	Income related benefits	ADULT
INNIRBEN	Non - income related benefits	

ADDITIONAL ACCOUNTS / ASSETS HELD

The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
ACCOUNT (28)	Credit Unions	New	ACCOUNTA, NININV, ININV
ACCOUNT (29)	Endowment Policy – not linked to property	New	ACCOUNTA, NININV, ININV
ASSETYPE (28)	Credit Unions	New	ACCOUNTA, CRUNACI, CRUNACB, CRUNACH
ASSETYPE (29)	Endowment Policy – not linked to property	New	ACCOUNTA, ENOMORTI, ENOMORTB, ENOMORTH

Ownership of Credit Unions and Endowments not linked to Property have been recorded as with other account types.

Derived Variable	Label	Table
CRUNACI	Credit Union held	ADULT
ENOMORTI	Endowment not linked to a mortgage held	
CRUNACB	Credit Union held	BENUNIT
ENOMORTB	Endowment not linked to a mortgage held	
CRUNACH	Credit Union held	HOUSEHOL
ENOMORTH	Endowment not linked to a mortgage held	

Income from Credit Unions has been included within the Net and Gross Investment Income Derived Variables.

Derived Variable	Label	Table
ININV	Investment Income	ADULT
NININV	Net Investment income	

TRAVEL TO WORK COSTS

Weekly travel costs and modes of transport for each adult are include, as usual, within the travel to work derived variables. The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
TTWCOSTS	Travel to Work	Rotated-on	TTWCOSTS, TTWMOD

Derived Variable	Label	Table
TTWCOSTS	Total weekly travel to work costs paid by adult	ADULT
TTWMOD	Usual method of travel to work	

TAX CREDITS

The mapping of base variable changes to derived variables is shown below:

Base Variable	Label	Status	DV's Affected
BENEFIT (1)	Disabled Person's Tax Credit	Dropped	BNTXCRED, INTXCRED
BENEFIT (18)	Working Families' Tax Credit	Dropped	BNTXCRED, INTXCRED
BENEFIT (40)	Working Families' Tax Credit – Lump Sum	Dropped	BNTXCRED, INTXCRED
BENEFIT (51)	Disabled Person's Tax Credit – Lump Sum	Dropped	BNTXCRED, INTXCRED
TAXCRED3	Children's Tax Credit	Dropped	INEARNS

Income from WFTC and DPTC has been removed from the ADULT and BENEFIT UNIT tax credit derived variables.

Derived Variable	Label	Table
BNTXCRED	Amount of Tax Credits Received as Benefit	ADULT
INTXCRED	Total Amount of Tax Credits Received	ADULT

NON-BENEFIT EDITING

There have been no changes to non-benefit editing due to changes in the 2004-05 data. However, we have introduced two checks to validate the data against the metadata.

The metadata contains information for most variables including what their minimum and maximum values should be. There are also many categorical variables; these have labels describing what each value means (these are in the FMTVALUE column on the hierarchical document).

This is an example from the hierarchical document, showing the labels for each of the values of the variable ACCTAX from the ACCOUNTS table. (The VAR_FMT column shows the name of the format which holds the values of the labels. This format can be used in SAS programs to output these labels instead of the raw values.)

TABLE	VARIABLE	VAR_F MT	LABEL	FRSVALUE	FMTVALUE
ACCOUNTS	ACCTAX	ACS_2X	Whether saving interest before or after tax	1	After tax
				2	Before tax - but tax payable
				3	Before tax - signed to get int. without tax

A link to the hierarchical document for each year can be found in the Metadata section on the dataset documentation page on the intranet site (eg http://asdweb/asd3/web/frs/documentation/2004_05/docscontents.html for 2004-05).

Minimum and Maximum Check

This checks the data against the minimum and maximum values that the metadata says should apply for each variable. If any discrepancies are found these can be checked and edited accordingly. There are no records remaining in the final release that fall outside these parameters.

Format Check

This checks the data to ensure that all the values held in categorical variables are represented by the format. So for the example above, ACCTAX, it will reject any values such as 0, 4, 5, 6 etc. Skipped values (.As) or other missing values (.B or .C) are not rejected as these are valid values. There are other checks in place to ensure they should (or should not) be there.

This check did highlight some discrepancies, most of which have now been rectified. There are a few discrepancies remaining. These are listed below;

TABLE	VARIABLE	LABEL	FORMAT NAME	ROGUE VALUE
ADMIN	VERSION	Version of program	ADN_11X	542
BENUNIT	HOUSHE1	are you able to keep this accommodation warm enough	ADT_107X	3
HOUSEHOL	ACORNEW	ACORN (New Version)	HOL_324X	0

The “Rogue Value” is the value held on the dataset but is not represented by the format. It should be noted that while we can edit the actual data we need ONS to change the formats. This means that where we identify invalid data values we can edit these ourselves, but incorrect formats (ie missing labels) need to be changed by ONS. We envisage to correct this from 2005-06.

BENEFIT EDITING

STATE SUPPORT PILOTS

Three new State Supports have been introduced to the dataset:

1. Work-Search Premium –Has been introduced as a pilot to help Lone Parents make the transition from benefits to full time work. It is a non-taxable payment of £20 per week for a maximum of 26 weeks. It was introduced in the 2003 Budget.
2. In-Work Credit- Another pilot aimed at helping Lone Parents make the transition from benefits to full time work. It is a non-taxable payment of £40 per week for a maximum of 52 weeks. It was also introduced in the 2003 Budget.
3. Return to Work Credit – A tax-free payment of £40 to those in work who were in receipt of disability or sickness related benefits for 13 weeks or more before starting the job. It was also introduced in the 2003 Budget.

As these three are all for set values there will be no editing of benefit amounts. If a respondent is receiving WSP, for example, the BENAMT will be automatically generated as £20.

WINTER FUEL PAYMENTS FOR THE OVER 70s

The one-off 70+ payment of £100, proposed in the 2004 Budget, has been introduced into the dataset. The payment is treated in the same manner as the 80+ payment and imputed for all eligible benefit units within the reporting year.

TAX CREDITS

WFTC and DPTC no longer exists. Data for both was only collected in April 2003 for the 2003-04 FRS. They have been replaced by Working Tax Credit and Child Tax Credit.

Some areas of WTC and CTC editing have been automated. This automation is based upon the editing principles for New Tax Credits established in 2003-04.

IMPUTATION

The tables below provide further details on all the variable changes that have led to a change in our three imputation methods:

- Bulk Edits
- Algorithms
- Hotdecks

Bulk Edits: New variables

TABLE	VARIABLE	COMMENTS
ADULT	BEN5Q7 BEN5Q8 BEN5Q9	Edited to No as with similar variables (closes the route).
ADULT	DDATRE	Edited to No.
ADULT	DISDIF9	Edited to No as with similar variables.
CHILD	CDDATRE	Edited to No.
CHILD	CDISDIF9	Edited to No as with similar variables.
JOB	INCLPAY7 INCLPAY8	Edited to No (closes the route).
JOB	PAPERIOD	Edited to 5 (number of weeks employer paid Statutory Adoption Pay). This is a temporary edit; there were no missing values in the 2004-05 dataset.
JOB	PPPERIOD	Edited to 2 (number of weeks employer paid Statutory Paternity Pay). Two is the maximum number of weeks that SPP can be paid for.
JOB	UINCPAY7 UINCPAY8	Edited to No (closes the route).
MORTGAGE	ENDWPRI5	Edited to No as with similar variables (closes the route).
RENTER	LOWSHORT	Edited to No.
RENTER	OTHTYPE	Edited to 7 (Other type of let).
RENTER	TENTYPE	Edited to 6 (Other type of let).

Bulk Edits: Rotated on variables

TABLE	VARIABLE
ADULT	FARE
ADULT	NITWMOD

ADULT	ONEWAY
ADULT	TTWCODE1
ADULT	TTWCODE2
ADULT	TTWCODE3
ADULT	TTWFAR
ADULT	TTWMOD
ADULT	TTWPAY
ADULT	TTWPSS

Bulk Edits: Dropped variables

TABLE	VARIABLE
ADULT	NTCAPP
ADULT	NTCORIG1
ADULT	NTCORIG2
ADULT	NTCORIG3
ADULT	NTCORIG4
ADULT	NTCORIG5
ADULT	TAXCRED3
ADULT	TAXCRED4
ADULT	TAXCRED5
HOUSEHOL	CENTFUEL
HOUSEHOL	CENTHEAT
HOUSEHOL	MODCON01
HOUSEHOL	MODCON02
HOUSEHOL	MODCON03
HOUSEHOL	MODCON04
HOUSEHOL	MODCON05
HOUSEHOL	MODCON06
HOUSEHOL	MODCON07
HOUSEHOL	MODCON08
HOUSEHOL	MODCON09
HOUSEHOL	MODCON10
HOUSEHOL	MODCON11
HOUSEHOL	MODCON12
HOUSEHOL	MODCON13
HOUSEHOL	MODCON14
RENTER	OTHWAY
RENTER	SHORT1
RENTER	SHORT2

Bulk Edits: Rotated off variables

TABLE	VARIABLE
ADULT	DENTIST
ADULT	EYETEST
ADULT	HOSP
ADULT	PRSCRPT
ADULT	SPECS
ADULT	VOUCHER
CHILD	DENTIST
CHILD	EYETEST
CHILD	HOSP
CHILD	PRSCRPT
CHILD	SPECS
CHILD	VOUCHER
HOUSEHOL	USEVCL
VEHICLE	VEHIC
VEHICLE	VEHOWN

Bulk Edits: Other Changes (existing)

TABLE	VARIABLE	COMMENTS
RENTER	ACCJBP04 ACCJBP05 ACCJBP06 ACCJBP07 ACCJBP08 ACCJBP09 ACCJBP10 ACCJBP11 ACCJBP12 ACCJBP13 ACCJBP14	This is a correction rather than a new edit. Previously only ACCJBP01 – ACCJBP03 were imputed but ACCJBP04 – ACCJBP14 should have been as well.

Bulk Edits: Category Change (existing)

TABLE	VARIABLE	COMMENTS
ADULT	NITRAIN	Old edit 7; new edit 9 (in certain circumstances)
ADULT	NITRAIN	Old edit 8; new edit 10 (in certain circumstances)
ADULT	TRAIN	Old edit 7; new edit 9 (in certain circumstances)
ADULT	TRAIN	Old edit 8; new edit 10 (in certain circumstances)

As documented elsewhere the categories for “Any other training scheme” and “None of these” have been renumbered.

Bulk Edits: Other Changes (added)

TABLE	VARIABLE	CHANGE FROM 2003-04
ADULT	ABSWHY	Existing variable added to the imputation suite.
MAINT	MRUS	Existing variable added to the imputation suite.

Bulk Edits: Other Changes (removed)

TABLE	VARIABLE	CHANGE FROM 2003-04
ADULT	ADEDUC	Moved to hotdecks.
ADULT	ADEMAPPD	Moved to Period Code Editing.
ADULT	HBOHWK	Moved to hotdecks.
ADULT	LSTYR	Moved to hotdecks.
CHILD	CHEMAPPD	Moved to Period Code Editing.
CHILD	CHWKERN	Moved to hotdecks.
HOUSEHOL	CTTIME	Moved to Period Code Editing.
HOUSEHOL	RTREBPD	Moved to Period Code Editing.
HOUSEHOL	SEWTIME	Moved to Period Code Editing.
HOUSEHOL	TYPEACC	Moved to hotdecks.
HOUSEHOL	WATTIME	Moved to Period Code Editing.
HOUSEHOL	WSEWTIME	Moved to Period Code Editing.
JOB	MADEMP	Moved to hotdecks.
JOB	MATEMP	Moved to hotdecks.
JOB	PAYPD	Moved to Period Code Editing.
JOB	UPD	Moved to Period Code Editing.
MORTGAGE	INCMINC1	Moved to hotdecks.
MORTGAGE	INCMINC2	Moved to hotdecks.
MORTGAGE	INCMINC3	Moved to hotdecks.
PENSION	TRIGHTS	Moved to hotdecks.

Hotdecks: New variables

TABLE	VARIABLE	COMMENTS
RENTER	HBYEARS	New variable. It is the number of years a household has been receiving Housing Benefit.

Hotdecks: Rotated on variables

TABLE	VARIABLE	COMMENTS
ADULT	FARE	Rotated on.
ADULT	ONEWAY	Rotated on.
ADULT	PSSAMT	Rotated on.
ADULT	TTWCOST	Rotated on.
ADULT	TTWFRQ	Rotated on.
ADULT	TTWREC	Rotated on.

Hotdecks: Dropped (and rotated off) variables

None

Hotdecks: Other Changes (existing)

TABLE	VARIABLE	CHANGE FROM 2003-04
ACCOUNTS	ACCINT ACCTAX INVTAX NSAMT	Slightly relaxed match on TOTSAV introduced as a mandatory factor. The bands for 7 and 8 were merged, as were 5 and 6. (So 20K to 25K and 25K to 30K were merged into 20K to 30K; and 30K to 35K and 35K to 40K were merged into 30K to 40K.) These higher bands were introduced in 2003-04 but there were fewer matches when using them in hotdecks. It is felt that this merging does not affect the effectiveness of this hotdeck.
ADULT	APDAMT	Added WORKING as a factor
ASSETS	AMOUNT	ASSETYPE is a new mandatory factor as AMOUNT is now used by two different assets.
CHILD	CHEMAAMT	Excludes CHEMAPD=95 instead of only taking CHEMAPD=1 (So hotdecks CHEMAAMT cases that weren't originally paid weekly, but excludes any remaining lump sums as these won't have been weeklyised.
JOB	PROFIT1 PROFTAX PROFIT2 SE1 SE2	Previously only hotdecked cases where OWNAMT was greater than zero. Now includes cases where OWNAMT is zero. (Very small number affected.)
JOB	SETAXAMT	Added SOC2000 as a factor
RENTER	RENT	Excludes cases where RENT is zero.

Hotdecks: Other Changes (added)

TABLE	VARIABLE	CHANGE FROM 2003-04
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MORTGAGE	MORTEND BORRAMT MORTLEFT RMAMT	Relaxed the matching on PURCAMT. Was matching to nearest £1,000 but this was too tight.
MORTGAGE	INTPRPAY MORINPAY INTRU MORUS	Relaxed the matching on MORTLEFT. Was matching to nearest pound but this was too tight.

Hotdecks: Other Changes (added)

TABLE	VARIABLE	Reason
ADULT	ADEDUC	From Bulk Edits
ADULT	LSTYR	From Bulk Edits
ASSETS	ISSDATE	Existing variable added to the imputation suite.
CHILD	CHWKERN	From Bulk Edits
HOUSEHOL	CTAMT	Only where CTREBAMT missing as well.
HOUSEHOL	CTREBAMT	Only where CTAMT missing as well.
HOUSEHOL	TYPEACC	From Bulk Edits
JOB	MADEMP	From Bulk Edits
JOB	MATEMP	From Bulk Edits
MORTGAGE	INCMINC1	From Bulk Edits
MORTGAGE	INCMINC2	From Bulk Edits
MORTGAGE	INCMINC3	From Bulk Edits
PENSION	TRIGHTS	From Bulk Edits

Algorithms: New variables

TABLE	VARIABLE	Description
JOB	SPPAMT SAPAMT USPPAMT USAPAMT	Imputed in same way as SMPAMT and USMPAMT (although see Other Changes below).

Algorithms: New variables

None

Algorithms: Dropped (and rotated off) variables

None

Algorithms: Other Changes (existing)

TABLE	VARIABLE	CHANGE FROM 2003-04
JOB	DEDOTH DEDUC1 DEDUC2 DEDUC3 DEDUC4 DEDUC5 DEDUC6 DEDUC7 DEDUC8 OTHDED1 OTHDED2 OTHDED3 OTHDED4 OTHDED5 OTHDED6 OTHDED7 OTHDED8 OTHDED9	BENEFIT in (11,18) removed from code as these benefits no longer used.
JOB	SMPAMT USMPAMT SPPAMT SAPAMT USPPAMT USAPAMT	This algorithm imputes missing amounts to the lower rate for SMP (and SPP and SAP). In previous years the wrong rate was used (SSP instead of SMP).
RENTER	HBWEEKS	The new variable, HBYEARS, is used to derive HBWEEKS where HBYEARS is over 2 (before the data is delivered to us). Where HBYEARS has been imputed this algorithm duplicates this process.

METHODOLOGY CHANGES

In some cases changes in information will require changes to the way we process and present data; there will also be instances where we identify the need for changes in response to user comment or from our own review of systems.

Details on the methodological changes we have agreed for 2004-05 are shown below under the area for which they are most applicable:

- **Derived Variables**
- **Non-Benefit Editing**
- **Benefit Editing**
- **Imputation**

DERIVED VARIABLES

FREE SCHOOL MEALS

Following an investigation and consultation with users it is recommended that the FRS and associated series should assign income to free school meals based on estimates from UNISON, for primary schools and for secondary schools, uprated by RPI.

For the current survey year, 2004-05, this rate is:

	2004-05
Primary	£1.40
Secondary	£1.50

This rate will be used in the derivation of FRS income from 2004-05; applied as a point-in-time estimate. It is not proposed to adjust the back-series but this will be noted so users can make the adjustment if necessary.

See [‘Assigning Income to Free School Meals Recommendation for Change’](#) for full details.

DERIVED VARIABLE NEW CONSTANTS

A number of the new derived variables require constants in their derivation. Information on these and the data sources are given below:

Accounts and Assets (New Constants)

- **Basic Accounts** were initially set-up to allow direct payment of benefits into Post Office or bank accounts. As savings are usually withdrawn immediately, this type of account has no other enhanced features and attracts the lowest interest rate compared to other types of accounts.

Data source for constants: FSA and Bank of England Annual reports

- **Credit Unions** are co-operative banking facilities usually found in rural communities or farming areas set-up with Government assistance. They are not controlled by the FSA but have their regulatory body; ABCUL. Interest rates are dependant on the number of investment shareholders/customers and the amount of overall total investments; interest is payable as a dividend at the end of each financial year.

Data source for constants: Assoc. of British Credit Unions Ltd. (ABCUL)

- **Accounts** usage indicator has been changed, from Categorical (**C**) to Continuous (**Q**), for the account variables in the ADULT, BENUNIT and HOUSEHOL tables; as the **DV** records how many types of account/s appear within each of the tables.

Table	Account variable/s usage changed from Categorical to Continuous
ADULT	curacti, poaccti, tesscti, otbscti, giltcti, untrcti, stshcti, nsbocti, sayecti, prbocti, pepscti, isacti, sscti, sclbcti, fsbndcti, basacti, gebacti, crunaci, enomorti
BENUNIT	curactb, poacctb, tessctb, otbsctb, giltctb, untrctb, stshctb, nsboctb, sayectb, prboctb, pepsctb, isactb, ssctb, sclbctb, fsbndctb, basactb, gebactb, crunacb, enomortb
HOUSEHOL	curacth, poacth, tesscth, otbscth, giltcth, untrcth, stshcth, nsbocth, sayecth, prbocth, pepscth, isacth, sscth, sclbcth, fsbndcth, basacth, gebacth, crunach, enomorth

DERIVED VARIABLE UPDATES TO CONSTANTS DATA SOURCES

In updating constants for the 2004-05 survey we have encountered a number of issues, some of which have been after user advice.

Self employed

Gross earnings of a self-employed adult are uprated to current year prices in line with current labour market trends.

In the previous 2003-04 survey, the base rate of 100% was taken from January 1995; however, from 2004-05 survey this has been updated to January 2000. Although there is a change in the base rate used and the constants generated are different, they remain in line with the 19.6% overall growth in the economy.

Data source for constants: ONS 'Average Earning Index all employee jobs in main industrial sectors', dataset table 4, col. LNMM

Water charges for Scotland

The three former water service providers for Scotland merged in 2004-05 to become “Scottish Water”. There is now no price differential according to a dwellings locale but instead this is calculated in accordance with the LAC housing bands A-H.

Data source for constants: Scottish Water Co.UK, table of Household charges

CHILD BENEFIT ELIGIBILITY

In light of the new rules regarding eligibility to receive Child Benefit in 2006-07, a flag has been created to monitor any ADULT within a household / benefit unit who may be affected by these changes :-

- 19 year olds completing non-advanced education / training starting before they were 19, up to an age limit of 20
- unwaged trainees aged 16-18
- 15 year old school-leavers in Scotland

NON-BENEFIT EDITING

The following new credibility checks have been added to the standard FRS validation suite:

PURCHASE VALUE and BORROWED AMOUNT

To ensure purchase value and borrowed amount reconcile. The new check is designed to pick up any keying in errors, and looks at extreme cases where the amount borrowed is less than 10% of the original purchase value. It builds on an existing Credibility Check which looks at cases where the mortgage left is exceeded by either the amount borrowed or the re-mortgage amount.

LAST MONTH and YEAR of PAID WORK

To ensure that the last month and year of paid work is not outside the interview date. For these cases, the year or month are edited to the interview date details. Again, this complements an existing Credibility Check which picks up interview dates outside the survey year.

FREE HOUSING with JOB

To flag all cases where the household is entitled to free housing with their job, but do not have any employment record on the JOB table. Whilst the majority of these cases are fine, since the householder is entitled to continue living rent-free into their retirement; we have found a couple of erroneous cases. These cases are currently not edited

GROSS WAGE/SALARY

To ensure gross wage/salary cannot be a zero, when deductions from gross wage/salary are greater than zero. This is not a plausible scenario, hence these cases have been edited to 'don't know', and will be dealt with by imputation.

SERVICE CHARGE AND INSURANCE PREMIUMS

The methodology used to edit cases that include both service charges and insurance premiums in the same insurance payment has been refined further.

ODDJOBS

Income from babysitting and mail order agents has been refined and brought inline with income from all other oddjobs. Previously income from these two income sources was based on a four week period. This has now been weeklyised inline with other income data.

BENEFIT EDITING

BENEFIT EDITING FOR NEW TAX CREDITS

Some areas of WTC and CTC editing have been automated. This automation is based upon the editing principles established in 2003-04.

IMPUTATION

A fair number of variables are no longer being edited to their mode. This type of imputing is rarely suitable and should really only be used where there are a small number of missing values and a very obvious mode. Variables that don't fit in this description have been identified and have been imputed with a different methodology, usually a simple algorithm within the bulk edits. In some cases they have been moved to hotdecks.

Some relaxing of factors that are used to match similar cases in hotdecks have taken place. It was decided that where factors are rounded amounts of continuous variables (such as MORTLEFT on the MORTGAGE table) the rounding had become too precise; sometimes matching (or attempting) to the nearest pound.

Please bring this document
to the Refresher Briefing

FAMILY RESOURCES SURVEY
INTERVIEWER'S GUIDE
TO
CHANGES

April 2004

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1 SUMMARY

Welcome to another fantastic year of the 'Family Resources Survey'. This is the fourth year of the current 5-year FRS contract, which was extended at the end of the last survey year.

This booklet describes the main changes made to the questionnaire from April 2004. These changes ultimately aim to be helpful and to form an improvement to the survey.

Interviewer Input

Thank you to all the interviewers who made suggestions to improve the questionnaire for 2004-05 mainly through the Field Report, telephone and also via suggestions at refresher briefings. Experienced interviewers are also involved in testing the program before the start of the survey year and during the survey year to monitor how well the changes have been incorporated. We are aware that we have not been able to implement all suggestions for change. Typically the reason is that the suggestions concerned harmonised questions which must remain consistent across surveys to enable comparison but sometimes the DWP did not agree with a suggestion, there were technical problems or unanticipated knock-on effects. However, a number of these ideas have led to new changes in this year's questionnaire. Some of the main examples are:

1. A show card has been introduced at the question TypeEd at the request of interviewers. This will enable the respondents to identify the correct educational category more quickly and easily.
2. Interviewers commented that the tenancy block was confusing to respondents, particularly the questions on Assured Shortholds (Short1 and Short2). The tenancy questions have been adjusted in line with the Survey of English Housing and are now more straightforward, which should constitute an improvement within the questionnaire.
3. Interviewers found that a number of respondents who have an 'interest only' mortgage have made no provision for covering the cost of the original loan other than the eventual sale of the house. An additional category now appears at **EndwPrin** to cover this outcome.
4. The new Basic Bank Accounts were not being picked up at the question **Accounts** and at interviewers request have been moved to category 2, underneath Current Accounts.
5. Extra guidance has been added to the questions on childcare to clarify exactly who is being asked about at this questions. Some interviewers had found that respondents were unsure whether to include grandparents and other family members. Clarification has also been added to define paid and unpaid childcare more clearly.

What's Gone and What's Back?

Two sections of the survey have been 'rotated off' (ie: removed for 2004/05) for the upcoming year - the Vehicle questions and the NHS questions. The only section to be re-introduced this year is the Travel to Work block. Both sets of questions are displayed in Section 2.

What's New?

A new suite of deprivation questions have been introduced this year and will replace the questions previously asked about Consumer Durables. These new questions have been taken from three other surveys (Families and Children Survey, British Household Panel Survey and Poverty and Social Exclusion Survey) and ask about Adult and Child Deprivation and Debt.

Automated checks also appear for the first time in the 2004-05 survey. At a number of key soft checks, when suppressed, the interviewer will be led directly to a field into which they record a note. This will speed up the interview overall as the interviewer will not have to arrow back and open up a note.

What's Changed?

The tenancy questions have been altered to bring them in line with the Survey of English Housing. This should make them clearer to both interviewers and respondents.

Show cards

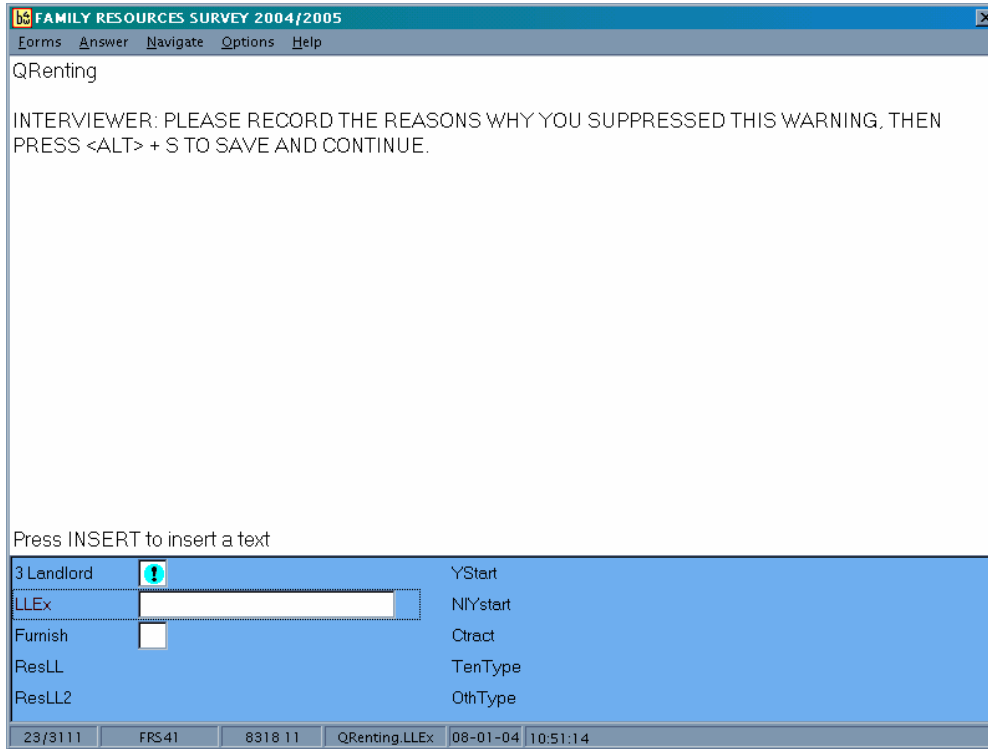
You will receive a new set of Show cards this year. These have been updated to reflect changes to the program. A guide outlining how these Show cards have changed is included at the end of this document.

Benefit Rates Checks

The benefit amounts in the 'checks' have been amended in line with the new amounts starting in April 2004. However, some benefits will not be updated until after the fieldwork has begun, so at the beginning of the month, you may find yourself being 'checked' erroneously. If this occurs, suppress the check and continue.

Automated Checks

Perhaps the most significant change to the FRS questionnaire this year is the introduction of automatically appearing fields where an important soft check is suppressed. Unfortunately, all too often, interviewers will suppress a check without leaving a note, causing a great deal of work at the editing stage. This new method automatically opens a field for the interviewer to type directly into without having to open a note which can be fiddly and time consuming. The overall interview should be speeded up by this as interviewers will be easily able to type quickly into the field before moving on. An example of this is shown below.



Consistency of Decimal Places

To increase the level of consistency when collecting monetary amounts within the FRS, almost all monetary amounts will now be collected to 2 decimal places. Problems can occur where amounts are collected as a whole number, rather than to 2 decimal places which is the norm. **PurcAmt** and **BorrAmt** are examples of these places and shown below.

PurcAmt	What was the purchase price of [your share in] your house/flat?
----------------	---

BorrAmt	What was the original amount of this mortgage or loan, in [year]?
----------------	---

State Earnings Related Pension Scheme (SERPS)

All places in the FRS questionnaire previously referring to SERPS will now refer to SERPS / S2P. The latter refers to the State Second Pension (S2P) which reformed SERPS in April 2002 to provide a more generous additional state pension for low and moderate earners, and some carers and people with long term illness or disability.

Third Party Deductions

This is the new name for what was previously called the 'Direct Payment Scheme' which was set up to deduct a set amount of money from peoples' Income Support or

Job Seekers Allowance and paid directly to a third party to cover mortgage interest and housing costs, fuel costs, water charges and council taxes.

Note

This booklet describes only changes which have a significant impact on interviewers. There are other changes, such as new derived variables, some additional checks, minor amendments, and technical fixes, which are not covered here.

'SOFT CHECK' = 'SIGNAL' both here and in the Interviewer Instructions

'HARD CHECK' = 'ERROR' both here and in the Interviewer Instructions

2 'ROTATION' OF QUESTION BLOCKS

'Rotated' sections of the questionnaire are usually asked every *other* year. This yields enough data for useful analysis, whilst reducing the burden on respondents and interviewers.

Two sections of the questionnaire will be 'rotated off' and one will be 'rotated on' for the 2004-05 survey year.

Rotated Off: Vehicle Ownership

(Block: QTVehic)

The questions covering vehicle ownership will be rotated off for 2004-05.

Name	Question	
UseVcl	SHOW CARD O "Do you, or any members of your household, at present own or have continuous use of any motor vehicles. IF YES: Please tell me how many?" INCLUDE COMPANY VEHICLES - UNLESS NO PRIVATE USE ALLOWED	Rotated Off
TypeVcl	"I would now like to ask about the [first/second etc] vehicle. Is it... 1. A car 2. A light van 3. a motor cycle 4. or some other motor vehicle?"	Rotated Off
PrivVcl	"Is the ^vehicle... 1. privately owned, 2. or is it a company vehicle?"	Rotated Off
AnyMore	"Do (any of) you at present own or have continuous use of any more motor vehicles?"	Rotated Off

Rotated Off: Welfare Questions

(Block: QWelfare)

The 'NHS' questions concerning prescriptions, dentist and hospital treatment, eye tests and glasses will be rotated off. These questions are being rotated additionally this year to allow for the new deprivation questions. However, the questions on free welfare milk and school meals are to be retained for this survey year.

NHS	<p>"In the past 4 weeks, have any of you ... READ OUT ...CODE ALL THAT APPLY... (enter at most 5 codes)</p> <p>1: ... received something on prescription?</p> <p>2: ... visited the dentist for a NHS examination or treatment?</p> <p>3: ... had an eyesight test?</p> <p>4: ... purchased glasses or contact lenses?</p> <p>5: ... or been to hospital for NHS treatment?</p> <p>6: (None of these)</p>	Rotated Off
Per	<p>"Who received the items on prescription?</p> <p>"Who visited the dentist?</p> <p>"Who had the eyesight test?</p> <p>"Who purchased the glasses or contact lenses?</p> <p>"Who went to hospital?</p>	Rotated Off
PrIt	<p>"How many items did [name] receive during the past 4 weeks?</p>	Rotated Off
Free	<p>"Were the items free of charge or did [name] have to pay?</p> <p>1: Free of charge</p> <p>2: Had to pay ?</p>	Rotated Off
Free	<p>"Was the examination or treatment free of charge or did [name] have to pay?</p> <p>1: Free of charge</p> <p>2: Had to pay</p>	Rotated Off
Free	<p>"Was the sight test free of charge or did [name] have to pay?</p> <p>1: Free of charge</p> <p>2: Had to pay</p>	Rotated Off

WhyFree	<p>“What are the main reasons for that being free of charge?</p> <ol style="list-style-type: none"> 1. Entitled through a social security benefit (IS, JSA, WFTC, DPTC) 2. Because they have a charges certificate HC2 3. Due to a medical condition (or a relative’s medical condition) 4. Because they required strong ‘complex’ lenses 5. Expecting a baby 6. Other reason 	Rotated Off
Voucher	<p>“For the glasses/contact lenses, was a NHS voucher used to help with the cost?</p> <ol style="list-style-type: none"> 1: Yes 2: No 	Rotated Off
Trav	<p>“Did [name] get any money back at the hospital, for travel costs?</p>	Rotated Off
WhyTrav	<p>“What are the main reasons for getting money back for travel costs?</p> <ol style="list-style-type: none"> 1. Entitled through a social security benefit (IS, JSA, WFTC, DPTC) 2. Because they have a charges certificate HC2 3. Due to a medical condition (or a relative’s medical condition) 4. Because they required strong ‘complex’ lenses 5. Expecting a baby 6. Other reason 	Rotated Off
Xintro	<p>“Has anyone else had anything on prescription ...</p> <p>“Has anyone else visited the dentist ...</p> <p>“Has anyone else had an eyesight test ...</p> <p>“Has anyone else purchased glasses or contact lenses ...</p> <p>... during the past 4 weeks?</p>	Rotated Off

Reinstated: Travel to Work Questions

(Block: QTravel)

The questions covering travel to work (and the Northern Ireland equivalents) will be rotated on for 2004-05.

Name	Question	
TtWFar	"About how far do you have to travel to your usual place of work?"	Reinstated
TtWFrq	"On how many days of the week do you usually travel to your usual place of work?"	Reinstated
TtWMod	"How do you usually travel to work?"	Reinstated
TtWPss	"Do you have a season ticket, bus pass or travelcard?"	Reinstated
PssAmt	"How much does the season ticket/bus pass/travelcard cost?"	Reinstated
PssDate	"And how long is it valid for?"	Reinstated
OthDate	"Please specify...?"	Reinstated
Fare	"How much does the journey by bus/train/tube or works bus/company transport cost each time?"	Reinstated
OneWay	"Is that the one way or return fare?"	Reinstated
TtWPay	"Do you pay for ALL, SOME or NONE of the costs of taking the [vehicle] to work?"	Reinstated
TtWCode	INTERVIEWER: PROBE AND CODE... 1: Respondent is passenger and contributes money to others 2: Respondent is driver and receives money from passengers/employer etc 3: Some other arrangement (neither of the above)	Reinstated
TtWCost	"How much do you pay per week?"	Reinstated
TtWRec	"How much do you receive per week?"	Reinstated

Removal of Consumer Durables Block

(Block: QModCons)

The Consumer Durables section is to be removed for the approaching survey year (**ModCon, CentHeat and CentFuel**). The material collected through these questions is becoming outdated and therefore the block is to be replaced by new questions covering deprivation, these documented later on. The questions about black and white and colour televisions and concessionary TV licences (**ConTV[1], ConTV[2] and TVLic**) will remain.

Name	Question	
ConTV[1]	“Does your household have any of the following items ... a colour TV set?” 1: One only 2: more than one 3: none	Remain On
ConTV[2]	“Does your household have any of the following items ...a black and white TV set?” 1: One only 2: more than one 3: none	Remain On
TVLic	“Do you claim a concessionary television licence?” 1: Yes 2: No	Remain On

Questions to be removed

ModCons	<p>“Does your household have any of the following items?”</p> <ul style="list-style-type: none"> ... 'TV satellite receiver - not digital' ... 'TV cable receiver - not digital ' ... 'Digital TV receiver (terrestrial, cable or satellite)' ... 'video recorder/player' ... 'deep freeze or fridge freezer' ... 'washing machine' ... 'tumble dryer' ... 'dishwasher' ... 'microwave oven' ... 'fixed telephone' ... 'mobile telephone' ... 'compact disc (CD) player' ... 'home computer' ... 'internet access' 	Removed
CentHeat	<p>“Do you have central heating in this accommodation... this may include storage heaters?”</p>	Removed
CentFuel	<p>“What fuel does it use?”</p>	Removed

3 HOUSEHOLD SCHEDULE

Cross- Referencing single sex couples with the Household Grid

(HHG)

The new harmonised question (**Cupchk**) was added to the questionnaire last year to help estimate the proportion of same sex couples. However, this question must be cross-referenced to the relationships entered in the Household Grid, and therefore two consistency checks have been included at this question.

SIGNAL

If same sex couple and relationship is NOT coded as cohabiting <i>'Can I just check, you said earlier that you were living with someone in this household as a couple, is this correct?'</i>

SIGNAL

If NOT same sex couple and relationship is coded as cohabiting <i>'Can I just check, are you living with anyone in this household as a couple?'</i>
--

Classification of Education Type

(Block: HHG)

Extra guidance at the question **TypeEd** was added to the FRS program last year, however, interviewers are still reporting confusion among some respondents. Therefore, a show card has been added to the question this year as an attempt to help respondents identify which category applies to them.

A new category 'Home Schooling' has been added to this question also.

TypeEd	<p>SHOW CARD A</p> <p>“What type of school or college does [name] attend?”</p> <p>1: Nursery School/Nursery Class/Playgroup/Pre-school 2: State run Primary (including reception classes) 3: Special school state run (e.g. for children with disabilities and special educational needs) 4: Middle-deemed Primary School (State run or assisted) 5: Middle-deemed Secondary School (State run or assisted) 6: Secondary School (State run or assisted) 7: Non-advanced further education/6th form/tertiary/further education college 8: Any PRIVATE/Independent school (prep, primary, secondary, City Technology Colleges) 9: University/polytechnic/any other higher education 10: Home Schooling</p>
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Changes have also occurred to the Northern Ireland version of the question **TypeEd**. As middle-deemed schools do not exist in Northern Ireland they will not appear on the screen or show card. The text 'State run or assisted' is not necessary and has been removed, instead 'Grammar' has been introduced at category 6: Secondary/Grammar School'

TypeEd	<p>SHOW CARD A</p> <p>“What type of school or college does [name] attend?”</p> <p>1: Nursery School/Nursery Class/Playgroup/Pre-school 2: Primary (including reception classes) 3: Special school (e.g. for children with disabilities and special educational needs) 4: <Not Used> 5: <Not Used> 6: Secondary/Grammar School 7: Non-advanced further education/6th form/tertiary/further education college 8: Any PRIVATE/Independent school (prep, primary, secondary, City Technology Colleges) 9: University/polytechnic/any other higher education 10: Home Schooling</p>
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Tenancy

(Block: QAccomDat)

There have been a number of changes to the questions within the tenancy block to improve the questions asked and to bring the FRS in line with the Survey of English Housing (SEH).

a) OthWay removed

Due to the introduction of new questions **OthWay** has been dropped from the FRS questionnaire. The information collected will be found through the new questions.

OthWay	<p>“There are various ways in which landlords can let accommodation. Will you please look at this card and tell me if your letting is one of these?” CODE FIRST THAT APPLIES</p> <ul style="list-style-type: none"> (1) Company licence (2) College licence - let by educational institution to a student (3) Non-exclusive occupancy agreement (4) Holiday let (5) Low season let (6) Crown tenancy (7) Business or agricultural tenancy - rented with business premises or agricultural land (8) Assured agricultural occupancy - for ex agricultural workers only (9) Service occupancy - tied accommodation that you have to live in to do your job. Includes accommodation for agricultural workers (10) Asylum-seeker let - provided through an official support service (11) None of these
---------------	--

b) Altered wording of FairRent

The wording of the question **FairRent** has been updated in line with the Survey of English Housing and is now less wordy and more straightforward.

FairRent	“Has the rent been registered by the local rent officer or rent committee?”
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c) The new tenancy questions from the Survey of English Housing

These three new questions form the main change to the tenancy block. There are variations to the order, wording and routing of the tenancy questions between England/Wales, Scotland and Northern Ireland due to the differences in tenancy law between countries. These variations are extremely important and the way the new questions will be used within each country will be covered in detail. For now, the three main questions to be introduced on the survey are shown below.

TenType	<p>SHOW CARD F</p> <p>“Can you tell me what kind of tenancy you have?”</p>
----------------	--

	<p>INTERVIEWER: IF TENANCY TYPE WRITTEN ON CONTRACT/NOTICE ASK RESPONDENT TO READ OUT</p> <p>1: Assured Shorthold 2: Assured 3: Regulated (tenancy must have started in 1988 or earlier) 4: Resident landlord 5: Let by educational institution 6: Other type of let</p>
OthType	<p>SHOW CARD G</p> <p>“There are various other ways in which landlords can let accommodation. Will you please look at this card and tell me if the letting is one of these?</p> <p>1: Crown tenancy/licence (includes H.M Forces) 2: Service occupancy (excludes H.M. Forces) 3: Business or agricultural tenancy 4: Assured agricultural occupancy 5: Asylum seeker let (issued by National Asylum Support Service NASS) 6: Holiday let 7: Other type of let</p>
LowShort	<p>“Is this a low season let? INTERVIEWER: THIS REFERS TO AN OUT OF SEASON LET</p> <p>1: Yes 2: No</p>

d) The ‘old’ questions – ‘Short1 and Short2’

The three new questions shown above have been introduced to help alleviate some of the confusion surrounding the ‘old’ questions on tenancy, these mainly being Short1 and Short2, the questions covering tenancy type and which describe the ‘Assured Shorthold’ tenancy in more detail. These questions are not disappearing altogether but will appear if the respondent answers DK or Ref to the new **TenType** and **OthType**.

Short1	<p>“There is a form of tenancy called an Assured Shorthold. It had to be initially for a fixed period and you had to be given a special notice in writing by the landlord that told you it was for an Assured Shorthold tenancy. Here is an example of a notice to a tenant saying that the tenancy is an Assured Shorthold.</p> <p>SHOW EXAMPLE OF NOTICE</p> <p>Does your notice state that it is an Assured Shorthold or not?”</p> <p>1: ...Yes, an Assured Shorthold, 2: ...Other agreement</p>
Short2	<p>“Most tenancies are Assured Shortholds. There are others just called ‘assured’. For these you have to be given a notice, in writing by the landlord, that tells you it is NOT an Assured Shorthold agreement.</p> <p>SHOW EXAMPLE OF NOTICE</p> <p>Does your agreement or notice state that it is NOT an Assured Shorthold?”</p> <p>1: ...Not an Assured Shorthold, 2: ...No, other agreement</p>

As earlier explained, the order, wording and routing of the questions in the tenancy block differs depending on which country you are interviewing in. Therefore, the questions will now be displayed for each country.

e) England and Wales

YStart	<p>ASK OR CODE</p> <p>“In which year did you first become a tenant of this accommodation?</p> <p>INTERVIEWER: 'YOU'=PERSON(S) NAMED AT 'HHolder', THAT IS...^RentName.”</p> <p>1988 or earlier, From 1989 to February 1997, March 1997 or later</p>
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Ctract	<p>“When you started to rent this accommodation ...READ OUT (RUNNING PROMPT)...</p> <p>...did you and the landlord sign a written agreement,</p> <p>...did you have a written agreement which you didn't sign,</p> <p>...or did you just have an unwritten agreement?”</p>
*TenType	<p>SHOW CARD F</p> <p>“Can you tell me what kind of tenancy you have? INTERVIEWER: IF TENANCY TYPE WRITTEN ON CONTRACT/NOTICE ASK RESPONDENT TO READ OUT</p> <p>1: Assured Shorthold 2: Assured 3: Regulated (tenancy must have started in 1988 or earlier) 4: Resident landlord 5: Let by educational institution 6: Other type of let</p>
*OthType	<p>SHOW CARD G</p> <p>“There are various other ways in which landlords can let accommodation. Will you please look at this card and tell me if the letting is one of these?</p> <p>1: Crown tenancy/licence (includes H.M Forces) 2: Service occupancy (excludes H.M. Forces) 3: Business or agricultural tenancy 4: Assured agricultural occupancy 5: Asylum seeker let (issued by National Asylum Support Service NASS) 6: Holiday let 7: Other type of let</p>
*LowShort	<p>“Is this a low season let? INTERVIEWER: THIS REFERS TO AN OUT OF SEASON LET</p> <p>1: Yes 2: No</p>

Short1	<p>“There is a form of tenancy called an Assured Shorthold. It had to be initially for a fixed period and you had to be given a special notice in writing by the landlord that told you it was for an Assured Shorthold tenancy. Here is an example of a notice to a tenant saying that the tenancy is an Assured Shorthold.</p> <p>SHOW EXAMPLE OF NOTICE</p> <p>Does your notice state that it is an Assured Shorthold or not?”</p> <p>1: ...Yes, an Assured Shorthold, 2: ...Other agreement</p>
Short2	<p>“Most tenancies are Assured Shortholds. There are others just called ‘assured’. For these you have to be given a notice, in writing by the landlord, that tells you it is NOT an Assured Shorthold agreement.</p> <p>SHOW EXAMPLE OF NOTICE</p> <p>Does your agreement or notice state that it is NOT an Assured Shorthold?”</p> <p>1: ...Not an Assured Shorthold, 2: ...No, other agreement</p>
FairRent	<p>“Has the rent been registered by the local rent officer or rent committee?”</p>

f) The differences in Scotland

There is only one main difference between the order of questions in Scotland to those asked in England and Wales (shown above). **Short2** is not asked in Scotland, **Short1** is always asked instead.

The wording of the new question **TenType** is also slightly different within the first category in that an 'Assured Shorthold' in England and Wales is referred to as a 'Short Assured' in Scotland.

*TenType	SHOW CARD F "Can you tell me what kind of tenancy you have? INTERVIEWER: IF TENANCY TYPE WRITTEN ON CONTRACT/NOTICE ASK RESPONDENT TO READ OUT 1: Short Assured 2: Assured 3: Regulated (tenancy must have started in 1988 or earlier) 4: Resident landlord 5: Let by educational institution 6: Other type of let
-----------------	--

g) Northern Ireland

These are a number of differences between how the tenancy questions are asked in **Northern Ireland** in comparison to how they are asked in England, Wales and Scotland. The questions are asked in Northern Ireland as follows:

NIYStart	ASK OR CODE "In which year did you first become a tenant of this accommodation?" INTERVIEWER: 'YOU = PERSON(S) NAMED AT Hholder, THAT IS...(name[s]) 1. 1978 or earlier 2. 1979 or later
Ctract	"When you started to rent this accommodation ...READ OUT (RUNNING PROMPT)... ...did you and the landlord sign a written agreement, ...did you have a written agreement which you didn't sign, ...or did you just have an unwritten agreement?"
*OthType	SHOW CARD G "There are various ways in which landlords can let accommodation. Will you please look at this card and tell me if the letting is one of these?" 1: Crown tenancy/licence (includes H.M Forces) 2: Service occupancy (excludes H.M. Forces) 3: Business or agricultural tenancy 4: Assured agricultural occupancy 5 Asylum seeker let (issued by National Asylum Support Service NASS) 6: Holiday let 7: Other type of let
FairRent	"Has the rent been registered by the local rent officer or rent committee?"

h) 'Ask or Code' at YStart

Interviewers suggested that **YStart** (and **NIYStart**) was altered to become an 'Ask or Code' question as the information asked for should already have been collected at the question **YearLive**.

YStart	ASK OR CODE "In which year did you first become a tenant of this accommodation?"
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i) Frame of reference at Rent

Interviewer testing revealed that the wording at the question **Rent** could be altered from 'actually pay' to 'currently pay' in order to provide a clearer frame of reference.

Rent	"How much rent does your household currently pay?"
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Housing Benefit Changes

(Block: QRenting)

a) *Frame of reference for Amount of Housing Benefit*

Interviewer testing found that the question **HBenAmt** can cause confusion in terms of who is referred to – the individual or the household. This question is positioned in the Household Schedule and therefore we are referring to the ENTIRE household. To make this clearer a text fill will appear in households where there is more than one person.

HBenAmt	<p>“How much Housing Benefit/Rent Rebate/allowance are you ^and the other members of your household allowed?”</p> <p>INTERVIEWER: Some respondents may receive more Housing Benefit than the amount of their rent</p>
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b) *Time receiving Housing Benefit*

Up until now the FRS questionnaire has asked for the number of weeks the respondent has been receiving Housing Benefit (**HBWeeks**). However, in many cases respondents will have received Housing Benefit for more than a year and will refer to the time in these terms rather than in weeks. Therefore, the wording of **HBWeeks** will be altered and a follow up question introduced.

HBWeeks	<p>“For how long have you been on Housing Benefit or Rent Allowance (this time)?</p> <ol style="list-style-type: none">1. Up to 2 years2. 2 years but less than 33. 3 years but less than 44. 4 years but less than 55. 5 or more years
HBWeeks2	<p>If HBWeeks = 1 (up to 2 years)</p> <p>“Please tell me how many weeks you have been on Housing Benefit or Rent Allowance (this time)?</p>

Mortgages

(Block: QOwner)

a) *‘Interest only’ versus ‘Repayment’*

Interviewers found that some respondents are confused between ‘interest only’ and ‘repayment’ mortgages. To help with this confusion, there is an on screen instruction at the question **MortType** to add extra information if the respondent is unsure what product they have.

MortType	<p>SHOW CARD I</p> <p>“Looking at this card, which one of these options best describes your mortgage?”</p> <ol style="list-style-type: none"> 1. an ENDOWMENT mortgage (where your mortgage payments cover interest only) 2. a REPAYMENT mortgage (where your mortgage payments cover interest and part of the original loan) 3. a PENSION mortgage (where your mortgage payments cover interest only) 4. a PEP, Unit Trust or ISA mortgage 5. BOTH an ENDOWMENT (or any interest only) mortgage AND a REPAYMENT mortgage 6. an INTEREST ONLY mortgage with MORE than one linked investment (e.g. pension and unit trust, endowment and ISA) 7. an INTEREST ONLY mortgage with NO linked investment (e.g. NO endowment, pension or PEP or ISA) 8. or another type (not listed above) <CTRL+M> to make a note <p>INTERVIEWER: If necessary add ‘With a repayment mortgage, by repaying the original loan we mean the original capital sum borrowed’.</p>
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b) How is the original loan covered?

Interviewers encountered some problems with the question **EndwPrin**. Respondents who had flexible mortgages tended to be confused at this question. Interviewers also found that the question does not adequately cover those respondents who have an interest only mortgage and have not made provision to pay off the original capital and were relying on the sale of the house to cover this.

Therefore, **EndwPrin** has been altered to make the question clearer to these respondents. The wording in brackets is textfilled if respondents have an endowment mortgage. There is also a new category at this question (**5: ‘proceeds of sale from existing house only’**). A show card will be introduced at **EndwPrin** to assist respondents.

EndwPrin	<p>SHOW CARD J</p> <p>“(Can I just check) How is the repayment of the original loan covered?”</p> <p>1: Current payments into a Pension Plan (pension mortgage) 2: Current payments into a PEP or ISA 3: Current payments into a Unit Trust or Investment Trust scheme 4: Current payments into any <u>other</u> savings/investment scheme 5: Proceeds of sale from existing house only 6: None of the above (describe in a note)</p>
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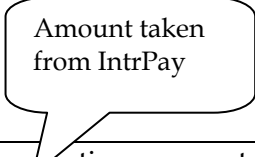
c) Show Card Diagrams

Diagrams were introduced on the 2003-04 survey show cards on the new flexible mortgage products. Since then, clearer diagrams have been found which are to be used instead in the new survey year.

d) Remove rounding

Interviewers commented that in displaying a rounded amount at the textfill at **IncMP** the accuracy of recording information to 2 decimal places is ‘undermined’. Respondents are asked for ‘pounds and pence’ at **IntrPay** and then it is not read back to them when textfilled at this question. The amount at IncMP will now be shown including the given 2 decimal places as opposed to rounding.

IncMP	<p>“Was this mortgage protection payment included in your last payment on the mortgage / loan [£n] [or in the endowment premium / Unit Trust / PEP / ISA / investment contribution of £n]?”</p>
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Childcare – do parents and grandparents count?

(Block: QChCare)

Information from interviewers in the field report showed that respondents occasionally become confused when answering the question **Care** as it can be unclear whether to include childcare provided by relatives (such as grandparents and even their own partners). The question wording at **Care** has been altered to help clarify this.

Care	<p>SHOW CARD R</p> <p>“Does anyone else, such as those people listed on this card, normally</p>
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	look after [names of child(ren)] on a regular basis, excluding care for social occasions? Which others?
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A show card has also been added to this question along with an F9 help screen.

<p>Childcare refers to looking after a child on a regular basis, ie. an ongoing arrangement to provide care for a child in the absence of the parent or parents. The type of care that would be excluded here would be when a single one-off arrangement is made. Childcare can be provided by anyone other than the actual parents.</p>

For further clarification on the distinction between paid and unpaid childcare and whether to include both, the following interviewer instruction has been added at **ChHr1** and **ChHr2**.

ChHr1	<p>“About how many hours a week child-care do you need for [name of child] i) in term time?</p> <p>INTERVIEWER: Include both paid and unpaid childcare.</p>
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The following F9 help screen has also been added to questions **ChHr1** and **ChHr2**.

<p>INTERVIEWER: Unpaid childcare is any care provided on a regular basis for which no cost is attached. This may include regular after school care provided by grandparents, a neighbour etc.</p>
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Interviewer discretion through use of brackets

a) Care and ‘old age’

(Block: QCare)

The text ‘problems relating to old age’ at the question **NeedHelp** can be embarrassing for interviewers and respondents as well as not always being applicable at a large number of households. Therefore, this text is to be placed within brackets so it can be asked at the interviewers discretion. This also keeps the wording of the question consistent with the harmonised question **Health**.

NeedHelp	<p>SHOW CARD P</p> <p>“In some households, there are people who receive help or support because they have long-term physical or mental ill-health or disability (or problems relating to old age). Is there anyone <u>in this household</u> who receives any of these kinds of help or looking after?”</p>
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b) Adaptation of question to people’s living circumstances

Text has also been placed between brackets for interviewers discretionary use at the question **GiveHelp**. The brackets mean that interviewers can adapt the question to fit better with people’s living circumstances.

GiveHelp	<p>SHOW CARD P</p> <p>“And how about people <u>not living with you</u>: do you (or does anyone else in this household) provide any help or support for anyone not living with you who has a long-term physical or mental ill-health problem or disability, or problems relating to old age?”</p>
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Improvement to Screen layout

(Block: QCare)

The layout of the screen at question **QNeedPer** has, up until now, appeared slightly full, including codes which cannot be used. It now only lists the names of the people relevant to that question, to allow easier coding for the interviewers.

4 BENEFIT UNIT SCHEDULE

Introduction of a Deprivation Suite of Questions

(Block: QAfford)

The most significant change to the FRS questionnaire this year is the introduction of a new block of questions on Deprivation. These will replace the Consumer Durables block but will be placed in the Benefit Unit rather than the household schedule. The questions relate to the Benefit Units of a household and it is extremely important that that is properly communicated to the respondent. The questions are used to help formulate an indicator of deprivation and have been taken from three existing surveys (Families and Children Survey (FACS), British Household Panel Survey (BHPS) and Poverty and Social Exclusion Survey (PSE)).

The new questions examine a large number of items that can be associated with standard of living. For the purpose of this study hardship is defined by respondents':

- ability to afford a number of items that most other people agree families ought to have;
- their other 'unmet needs'; and
- whether they are managing their money and staying clear of problem debts - that is debts they cannot repay and are 'getting behind' with the repayments.

No single one of these items is a very adequate measure, but taken together they add up to a very sensitive measure of family material well-being or hardship.

The questions will differ in wording depending on who is included in the Benefit Unit and will be text filled accordingly. Importantly, the questions only need to be answered by one member of the benefit unit (if there is a couple), though both can help answer the questions if need be. The laptop will select one adult at random though you will be able to ask the questions of the other adult if necessary. A third code will appear at **WhoDepQ** allowing interviewers to route past the deprivation questions for the few cases where interviewers may complete the entire benefit unit by proxy (eg where the interviewer has tried a number of times to make contact with a grown up son or daughter and they given their permission for the information to be given by proxy). There is a help screen at this question to help clarify the circumstances to use code 3.

WhoDepQ	<p>ASK OR CODE</p> <p>“The next set of questions should be answered by ^Name . You can answer the questions together if you wish.”</p> <p>INTERVIEWER ENTER ^Name below if they are available to answer these questions now. Otherwise enter ^Name.</p> <ol style="list-style-type: none"> 1. ^name1 2. ^name2 3. Interview is being conducted by proxy for this respondent / Benefit unit. <F9>
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F9 Help Screen

Use this code ONLY in cases where the interview is conducted entirely by proxy. If (any of) the name(s) respondent(s) is / are available then these questions MUST be asked of that respondent.

Three new checks have been added at **WhoDepQ** to ensure the correct person is asked the new questions and as a clarification for circumstances where the other adult answers them instead.

SIGNAL

If more than 1 adult in Benefit Unit and interviewer enters respondent NOT selected randomly
 INTERVIEWER: The questions should have been answered by ^Name but you have entered ^Name. If this is because ^Name is not present suppress the check and continue. Otherwise ask ^Name to answer these questions.

HARD SIGNAL

If interviewer did not ask deprivation questions (entered code 3) and later codes the interview as personal
 INTERVIEWER: You have entered that this interview has been conducted in person but earlier you said that the interview was being conducted by proxy. If the interview is a personal interview you MUST now ask the affordability questions.

The questions will be text filled so that they apply to the relevant people within each Benefit Unit. For example, if the Benefit Unit contains children, questions will be asked about “you and your family”, if the Benefit Unit contains two adults, questions will be asked about “you and your partner”. If the Benefit Unit only contains one adult the questions will simply ask about “you”.

There are three groups of questions within the deprivation block; Adult Deprivation, Child Deprivation and Debt. These groups are shown below:

a) Adult Deprivation

AddInt	"This next section is about the sorts of things that some families have, but which many people have difficulty finding the money for.
AddHol	<p>SHOWCARD ZZ</p> <p>"For each of the following things please tell me the number from the showcard which best explains whether you and your family have it or not. Do you and your family have...READ...</p> <p>...a holiday away from home for at least one week a year, whilst not staying with relatives at their home?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION":</p> <p>We have this, We would like to have this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>
AddMel	<p>SHOWCARD ZZ</p> <p>"For each of the following things please tell me the number from the showcard which best explains whether you and your family have it or not. Do you and your family have...READ...</p> <p>...friends or family around for a drink or meal at least once a month?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION":</p> <p>We have this, We would like to have this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>

Some respondents may be unsure about what to include when thinking of "all-weather shoes". This is based on the respondent's judgement - trainers may or may not count, depending on their perception. Shoes still count if they are part of standard school uniform.

AddShoe	<p>SHOWCARD ZZ</p> <p>"For each of the following things please tell me the number from the showcard which best explains whether you and your family have it or not. Do you and your family have...READ...</p>
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	<p>...two pairs of all weather shoes for ^Name and ^Name?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION":</p> <p>We have this, We would like to have this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>
AdDDec	<p>SHOWCARD ZZ</p> <p>"For each of the following things please tell me the number from the showcard which best explains whether you and your family have it or not. Do you and your family have...READ...</p> <p>...enough money to keep your home in a decent state of decoration?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION":</p> <p>We have this, We would like to have this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>
AdDIns	<p>SHOWCARD ZZ</p> <p>"For each of the following things please tell me the number from the showcard which best explains whether you and your family have it or not. ^Can I just check, do you and your family have...READ...</p> <p>....household contents insurance?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION":</p> <p>We have this, We would like to have this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>

<p>AddMon</p>	<p>SHOW CARD AAA</p> <p>Now I want to ask a few questions about things you and your family can afford to do. For each please choose the number from the showcard.</p> <p>Do you and your family ...READ...</p> <p>...make regular savings of £10 a month or more for rainy days or retirement?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>We do this, We would like to do this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>
<p>AdepFur</p>	<p>SHOW CARD AAA</p> <p>Now I want to ask a few questions about things you and your family can afford to do. For each please choose the number from the showcard.</p> <p>Do you and your family ...READ...</p> <p>...replace any worn out furniture?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>We do this, We would like to do this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>

<p>Af1</p>	<p>SHOW CARD AAA</p> <p>Now I want to ask a few questions about things you and your family can afford to do. For each please choose the number from the showcard.</p> <p>Do you and your family ...READ...</p> <p>...replace or repair major electrical goods such as a refrigerator or a washing machine, when broken?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>We do this, We would like to do this but cannot afford this at the moment, We do not want / need this at the moment, [Does not apply]</p>
<p>AfDep2</p>	<p>SHOWCARD BBB</p> <p>Now please look at Card BBB. (On a slightly different note) do you have a small amount of money to spend each week on yourself (not on your family)?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>I have this, I would like to have this but cannot afford this at the moment", I do not want / need this at the moment", [Does not apply]</p>
<p>AdDepLes</p>	<p>SHOWCARD BBB</p> <p>And do you have a hobby or leisure activity?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>I have this, I would like to have this but cannot afford this at the moment, I do not want / need this at the moment, [Does not apply]</p>

Houshe1	<p>"For the next question please answer just yes or no. In winter, are you able to keep this accommodation warm enough?</p> <p>CODE 'CAN'T AFFORD IT' AS 'NO'</p> <p>Yes, No, [Does not apply]</p>
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b) Child Deprivation

Respondents are asked to think of all of their dependent children when answering these questions. Cases may arise, however, where one child 'has' and one cannot afford or one 'doesn't need' and one cannot afford. In these cases priority coding is necessary. The priority will ALWAYS be cannot afford, therefore in the above two examples, 'cannot afford' should have been coded. Following this, if one child 'has' and one 'doesn't need' interviewers should code 'doesn't need'. Therefore, the priority order is:

- 1: cannot afford,
- 2: doesn't need,
- 3: (all) have.

The Child Deprivation Questions are shown below.

CDepInt	"The next questions are asked about all the children you (and your partner) are responsible for in this household. Please think about ^names of children in BU} when answering these questions?
CDepHol	<p>SHOWCARD DDD</p> <p>"For each of the following please tell me the number from the showcard that best explains whether your child / children has / have it or not.</p> <p>Does your child have / do your children have...READ...</p> <p>...a family holiday away from home for at least one week a year?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>Child(ren) has / have this, Child(ren) would like to have this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>

IF TWO OR MORE CHILDREN AGED 10 OR OVER IN BENEFIT
UNIT OF OPPOSITE SEX

<p>CdepBed</p>	<p>SHOWCARD DDD</p> <p>And are there enough bedrooms for every child of 10 or over of a different sex to have their own bedroom?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>Child(ren) has / have this, Child(ren) would like to have this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>
<p>Cdepeq</p>	<p>SHOWCARD DDD</p> <p>"Does your child have / do your children have...READ...</p> <p>...leisure equipment such as sports equipment or a bicycle?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>Child(ren) has / have this, Child(ren) would like to have this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>
<p>CdepCel</p>	<p>SHOWCARD DDD</p> <p>"Does your child have / do your children have...READ...</p> <p>...celebrations on special occasions such as birthdays, Christmas or other religious festivals?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION</p> <p>Child(ren) has / have this, Child(ren) would like to have this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>

<p>CdepSum</p>	<p>SHOWCARD EEE</p> <p>I now want to ask some questions about whether or not your children can afford to do a number of different activities. Please choose your answer from this card.</p> <p>Does your child / do your children...READ...</p> <p>...go swimming at least once a month?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION.</p> <p>Child(ren) do this, Child(ren) would like to do this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>
<p>CdepLes</p>	<p>SHOWCARD EEE</p> <p>I now want to ask some questions about whether or not your children can afford to do a number of different activities. Please choose your answer from this card.</p> <p>Does your child / do your children...READ...</p> <p>...do a hobby or leisure activity?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION.</p> <p>Child(ren) do this, Child(ren) would like to do this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>

CdepTEa	<p>SHOWCARD EEE</p> <p>I now want to ask some questions about whether or not your children can afford to do a number of different activities. Please choose your answer from this card.</p> <p>Does your child / do your children...READ...</p> <p>...have friends round for tea or a snack once a fortnight?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION.</p> <p>Child(ren) do this, Child(ren) would like to do this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>
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IF ANY CHILD / CHILDREN YOUNGER THAN 6 IN BU AND DO NOT ATTEND PRIMARY SCHOOL OR ANY PRIVATE OR INDEPENDENT SCHOOL

Cplay	<p>SHOWCARD EEE</p> <p>Does / do ^name/s of child/ren...READ...</p> <p>...go to a toddler group / nursery / playgroup at least once a week?</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION.</p> <p>Child(ren) do this, Child(ren) would like to do this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>
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IF ANY DEPENDENT CHILD / CHILDREN AGED 6 OR OLDER IN BU OR ANY CHILD / CHILDREN AGED YOUNGER THAN 6 AND ATTEND A PRIMARY SCHOOL OR ANY PRIVATE OR INDEPENDENT SCHOOL

CdepTrp	<p>SHOWCARD EEE</p> <p>Does / do ^names of children...READ...</p> <p>...go on school trips? Again, please choose your answer from this card.</p> <p>THIS IS RESPONDENT'S OWN INTERPRETATION.</p> <p>Child(ren) do this, Child(ren) would like to do this but we cannot afford this at the moment, Child(ren) do not want / need this at the moment, [Does not apply]</p>
Cdely	<p>"For the next question please just answer yes or no. Does your child have / do your children...READ...)</p> <p>...have an outdoor space or facilities nearby where they can play safely?</p> <p>'NEARBY' AND 'SAFELY' ARE RESPONDENT'S OWN INTERPRETATION.</p> <p>Yes, No [Does not apply]</p>

c) Debt

There is only one final question on Debt forming part of the new deprivation suite. This question explores whether people are behind with any payments. One code which has potential for confusion is code 6 which asks about telephone bills. Interviewers are to include both mobile and fixed line telephones at this question.

Debt	<p>"I am now going to ask you about paying bills for things like electricity, gas and water rates.</p> <p>SHOWCARD FFF</p> <p>Sometimes people are not able to pay every bill when it falls due. May I ask, are you up-to-date with the bills on this card, or are you behind with any of them?</p> <p>INTERVIEWER: THERE ARE 10 CODES. INTERVIEWER: 'Which others' UNTIL 'No others'</p> <p>Behind with the electricity bill, Behind with the gas bill, Behind with other fuel bills like coal or oil, Behind with Council Tax, Behind with insurance policies, Behind with telephone bill, Behind with television/ video rental or HP, Behind with other HP payments, Behind with water rates, Not behind with any of these</p>
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This question appears slightly differently in Northern Ireland.

Debt	<p>"I am now going to ask you about paying bills for things like electricity, gas and water rates.</p> <p>SHOWCARD FFF</p> <p>Sometimes people are not able to pay every bill when it falls due. May I ask, are you up-to-date with the bills on this card, or are you behind with any of them?</p> <p>INTERVIEWER: THERE ARE 10 CODES. INTERVIEWER: 'Which others' UNTIL 'No others'</p> <p>Behind with the electricity bill, Behind with the gas bill, Behind with other fuel bills like coal or oil, Behind with insurance policies, Behind with telephone bill, Behind with television/ video rental or HP, Behind with other HP payments, Behind with rates, Not behind with any of these</p>
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Disability Discrimination Act

(Block: QHealth)

FRS uses the Disability Discrimination Act definition as the basis for its' questions on disability. There have been a few changes to the questions **DisDif** and **CdisDif** (child's disabilities) to keep in line with the definition (which are denoted in bold) and two new follow up questions (one for adults, one for children if answer is code 10 - none of these).

DisDif/ CDisDif	<p>SHOW CARD U</p> <p>"Does this health problem(s) or disability(ies) mean that you have significant difficulties with any of these areas of your life? PROBE: 'Please read out the numbers from the card next to the ones which apply?':</p> <p>1: Mobility (moving about) 2: Lifting, carrying or moving objects 3: Manual dexterity (using your hands to carry out everyday tasks) 4: Contenance (bladder control) 5: Communication (speech, hearing or eyesight) 6: Memory or ability to concentrate, learn or understand 7: Recognising when you are in physical danger 8: Your physical co-ordination (eg: balance) 9: Other health problem or disability 10: None of these</p>
DDATre	<p>"Can I just check, do you take medication without which your health problems (when taken together), would significantly affect your life in the areas we have been discussing?</p> <p>1: Yes 2: No</p>

Follow up question for children:

CDATre	<p>"Can I just check, does (Name) take medication without which their health problems (when taken together), would significantly affect their life in the areas we have been discussing?</p> <p>1: Yes 2: No</p>
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Education Type

(Block: QEduc)

The question wording at **EdTyp** can often appear confusing in terms of linking the answer categories to the question wording. Hence, the wording has been amended so it is as clear as possible to respondents. The last answer code has also been altered in an attempt to better relate to the question wording.

EdTyp	<p>“What kind of course are you on. Is it full-time or part-time, a medical or nursing course or some other kind of course?</p> <ol style="list-style-type: none">1. school/full time2. school/part time3. sandwich course4. studying at university or college including 6th form college FULL TIME5. training for a qualification in nursing, physiotherapy or a similar medical subject6. on a PART TIME course at university or college, INCLUDING day release and block release7. on an Open College course8. on an Open University course9. any other correspondence course10. Any other course including other self/open learning courses
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Education Grants

(Block: QEduc)

Interviewers have reported cases arising where a private company is providing a grant or scholarship to a respondent and they are unsure whether this should be counted at the question **Grant**. It has been confirmed that where companies provide financial assistance this should be included. Clarification has been added at this question in the form of an F9 help screen.

If a private company provides a scholarship, bursary, grant or similar award this SHOULD be included

New Deal and New Deal for Disabled People

(Block: QCurst)

The New Deal 50 plus started in April 2000 and whilst is not a separate payment in itself it does qualify for an increased Working Tax Credit payment. It is open to people who are over 50 years of age who have been receiving either Job Seekers

Allowance, Income Support, Incapacity Benefit or Severe Disablement Allowance for 6 months or more. The aim is to help people find work, through identifying training opportunities and assistance when applying for work.

The New Deal for Disabled People is voluntary and open to people who receive disability or health related benefits but would like to work. The scheme is delivered through a network of Job Brokers based on their previous experience of working with people with health conditions or disabilities. Similar to The New Deal for 50+ the aim is to help people find work through identifying training opportunities and assistance when applying for work.

The categories at the question **Train** have been updated to include New Deal 50 plus and New Deal for Disabled People. Code 6 has been altered to the new name for this scheme (New Deal for Young People (18-24)).

Train	<p>SHOW CARD W</p> <p>“Were you on any of the government schemes for employment training shown on this card?”</p> <p>CODE ONE ONLY</p> <p>1: Work based learning for young people / Youth Training (YT) 2: Work based learning for adults (WBLA) / Training for Work (TfW) 3: Work Trial 4: New Deal 25+ / Employment Zones / Project Work 5: Career Development Loans / Youth Credits 6: New Deal for Young People (18-24) 7: New Deal 50+ 8: New Deal for Disabled People 9: Any other training scheme 10: None of these</p>
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Unpaid employees – are they working or not?

(Block: QCurst)

We came across a relatively unusual case during last years FRS survey in which an aupair was classified as ‘working’ yet received no actual payment. Instead their food and lodgings were ‘free’. In these cases, the respondent should NOT be coded as working as the questions ask about a ‘paid’ job which this is not.

This should also include Roman Catholic Priests who receive a stipend which is not payment as such, but an allowance of food and the cost of living. As such they do not have a paid job and should not be recorded in this manner.

Working	<p>ASK OR CODE: “Did you do any paid work in the 7 days ending Sunday the [date/month], either as an employee or as self-employed? PROMPT IF NECESSARY: Were you working last week? (INTERVIEWER: IF BUSINESS START-UP, CODE AS WORKING).</p>
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Paternity Pay

(Block: QEmpJob)

In previous years on the FRS we have not collected information on Paternity Pay or Adoption Pay. As these form statutory rights for some people it is important that we begin to gather this data. The codes ‘Statutory Paternity Pay’ and ‘Statutory Adoption Pay’ will be added to the question **InclPay** and to the show card.

InclPay	<p>SHOW CARD BB “Did your last wage/salary include any of the items on this card? CODE ALL THAT APPLY</p> <ol style="list-style-type: none"> 1. Statutory Sick Pay 2. Statutory Maternity Pay 3. Statutory Paternity Pay 4. Statutory Adoption Pay 5. Income Tax Refund 6. Mileage Allowance or fixed allowance for motoring 7. Motoring expenses refund 8. Tax Credit 9. None of these
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Two follow up questions will be added for Statutory Paternity Pay.

SPPAmt	“How much was included for Statutory Paternity Pay?
PPPeriod	“How many weeks is/was your employer paying Statutory Paternity Pay? INTERVIEWER: This can be for up to 8 weeks

Four checks will follow these questions concerning gender, refusal, the amount and the time period within which it is possible to receive the payment.

SIGNAL

If respondent is female and in receipt of Statutory Paternity Pay INTERVIEWER: Females cannot receive paternity pay. Please check your answers.
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SIGNAL

If DK or Ref to give amount of Statutory Paternity Pay
 “This is very important information. Please obtain it wherever possible. If you are unable to please make a note to show that you probed”.

SIGNAL

If receiving more than £100 a week for Statutory Paternity Pay
 “It is unusual for someone to receive more than £100 a week for Statutory Paternity Pay. Please check the circumstances and explain the circumstances in a note.

SIGNAL

If receiving Statutory Paternity Pay for more than 8 weeks
 INTERVIEWER: Statutory Paternity Pay can only be received for up to 8 weeks. Check the circumstances and explain in a note if you suppress this check”.

There are also two new follow up questions for Statutory Adoption Pay

SAPAmt	“How much was included for Statutory Adoption Pay?”
PAPeriod	“How many weeks is/was your employer paying Statutory Adoption Pay?” INTERVIEWER: This can be for up to 8 weeks

Statutory Paternity Pay and Statutory Adoption Pay have an influence at the question **InclPay1** which asks about USUAL pay. The categories are added to this question in the same way as within **InclPay**.

InclPay1	<p>SHOW CARD BB</p> <p>“Does/Did your last wage/salary include any of the items on this card?”</p> <p>CODE ALL THAT APPLY</p> <ol style="list-style-type: none"> 1. Statutory Sick Pay 2. Statutory Maternity Pay 3. Statutory Paternity Pay 4. Statutory Adoption Pay 5. Income Tax Refund 6. Mileage Allowance of fixed allowance for motoring 7. Motoring expenses refund 8. Tax Credit 9: None of these
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Two new questions have been added following **UsMpAmt**.

UsPPAmt	"How much was included for Statutory Paternity Pay in usual pay?"
UsAPAmt	"How much was included for Statutory Adoption Pay in usual pay?"

Home working for the Self Employed

(Block: QSelfJob)

Prior to the 2004-05 survey year, the question **BusRoom** is asked of all respondents within the Household Schedule and only a small fraction respond positively and are led on to the two subsequent questions. These questions will now be positioned within the Benefit Unit and only asked to self-employed respondents. The wording of **BusRoom** has also changed to reflect that it will only be asked to those who we have already ascertained to be self-employed.

BusRoom	"Are any of the rooms you have mentioned used wholly or partly for business?"
OnBsRoom	"How many rooms are used...READ OUT... i) wholly for business?"
PtBsRoom	"How many rooms are used...READ OUT... ii) partly for business?"

Tax Credit Late Change

(Block QTaxCred)

There was a very late change to the Tax Credit block. This is not in the interviewer Question Instructions.

As some tax credit awards are still based on 2001/2 income an additional category has been added at **NTCDat**. This question is asked to all those who have an award notice.

NTCDat	From the award notice, can you tell me the year from which income was used to calculate your tax credit award? INTERVIEWER: Tax credit awards for 2004/5 will initially be based on income in 2003/4. However, recipients can report 2004/5 income to Inland Revenue within the year, and a new award notice is issued. The information asked about in this question will be in the second column on page 2. 1. 2004/5 2. 2003/4 3. 2001/2 3. One or more applicants receive IS/JSA/MIG so info not on Award Notice
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The questions **NTCApp** (asked to all of those with an award notice) and **NTCOrigin** (asked to all of those in receipt of a tax credit) have been dropped. Please note that as this was a late change there is no card **II** in the FRS this year.

NTCApp	Initial applications for [Working Tax Credit/Child Tax Credit/Working and Child Tax Credit] have been based on family income for April 2001 and March 2002. Since then have you contacted the Inland Revenue to report an estimate of income for April 2003 to March 2004? 1. Yes - subsequent reporting of income to Inland Revenue 2. No - no subsequent reporting of income to Inland Revenue
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NTCOrigin	<p>Just before you started receiving [Working Tax Credit/Child Tax Credit], were you or your partner receiving any of the following? Prompt: Which others? SHOW CARD II</p> <p>CODE ALL THAT APPLY</p> <p>1: Working Families' Tax Credit 2: Disabled Person's Tax Credit 3: Children's Tax Credit (via PAYE) 4: Income Support 5: Jobseekers allowance (income based) 6: None of these</p>
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Travelling to Work by Taxi

(Block: QTravel)

Travel to work costs are collected for all modes of transport with the exception of taxis. As taxis' sometimes play a part in travel to work we must collect this data. Therefore, the question Fare will be asked for taxi journeys and will be text filled accordingly.

Fare	How much does the journey by taxi cost each time . If you share the taxi with others please only include your share of the fare?
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Child Support Reforms and Benefit Pilot Schemes

(Block: QBenefit)

Child Support Reforms were introduced in March 2003 to alter the way maintenance is calculated, although the reforms ONLY apply for new cases since then. The new system is called the 'Child Maintenance Premium' and category 4 at question **Ben5Q** has been updated to reflect this change (see over the page for **Ben5Q**).

Two follow up questions have been amended to ensure they relate to Child Maintenance Premium.

BenAmt	<p>[BENEFIT NAME] "How much did you get last time for [benefit name]?"</p>
BenPd	"How long did this cover?"

A number of measures mentioned in the 2003 budget will be introduced in certain pilot areas and need to be included in the FRS questionnaire.

The schemes include a 'Work Search Premium' which will be in 8 pilot areas, a new 'In-Work Credit', available in 12 pilot areas (both of which are for lone parents) and a 'Return to work Credit' (for disabled people). These three schemes will be available later this year. These schemes will be included within question **Ben5Q** and the show card at this question.

Ben5Q	<p>SHOW CARD QQ</p> <p>"In the last 6 months, have you received any of the things shown on this card, in your own right?"</p> <p>1: A Back to Work Bonus 2: 'Extended payment' of Housing Benefit/rent rebate, or Council Tax Benefit (4 week payment only) 3: Bereavement Payment – paid in lump sum 4: Child Maintenance bonus / Child Maintenance Premium 5: Lone Parent's Benefit Run-On 6: Work Search Premium 7: In-Work Credit 8: Return to Work Credit 9: Any National Insurance or State benefit not mentioned earlier 10: None of these</p>
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A check will follow this question to flag cases where people have said they are in receipt of 'Work Search Premium' or 'In-Work Credit' and are not lone parents.

SIGNAL

INTERVIEWER: "You cannot be in receipt of Work Search Premium / In-work Credit unless you are a lone parent. Please amend this answer".

Winter fuel payments

(Block: QBenefit)

In some cases the questions on Winter Fuel payments were asked to under 60's last year. Some interviewers have reported that they found this confusing. The question routing has now been altered so that the question is only asked to people aged 60 or older.

Ben4Q	<p>SHOW CARD PP</p> <p>“In the last 12 months, have you received any of the things shown on this card, in your own right?”</p> <ol style="list-style-type: none"> 1. A grant from the Social Fund for funeral expenses 2. A grant from the Social Fund for maternity expenses/Sure Start Maternity Grant 3. A Social Fund loan or Community Care grant 4. None of these
WintFuel	<p>“In the last 12 months, have you received winter fuel payment in your own right?”</p> <ol style="list-style-type: none"> 1. Yes 2. No

Odd Jobs

(Block: QOIncB)

Interviewer feed back showed that the questions asked about Odd Jobs are not particularly clear, particularly regarding babysitting and mail order agent work. For instance, in cases where the respondent has had more than one babysitting job in the last four weeks it is not clear whether we are referring to one or all of them. When the pay was collected it was not clear whether it should be added together for all the jobs or just taken from the most recent.

To help clarify what to include where the respondent has undertaken more than one babysitting or mail order job in the last four weeks, an interviewer instruction has been added to two questions to ensure the amount refers to ALL of these jobs.

BabPay	<p>“How much income did you receive in the last 4 weeks for babysitting?”</p> <p>INTERVIEWER: Please refer to the amount paid for ALL babysitting jobs in the last four weeks.</p>
MailPay	<p>“How much income did you receive in the last 4 weeks as a mail order agent?”</p> <p>INTERVIEWER: Please refer to the amount paid for ALL mail order agent jobs in the last four weeks.</p>

Tax on Tessa

(Block: QAdInt)

We no longer ask the question **AccTax** on interest paid on a Tessa as these are exempt from tax and therefore the question does not apply.

Accounts Question

(Block: QAdInt)

a) **Basic Bank Accounts**

Feed back from interviewers showed that some respondents were missing the 'Basic Bank Account' category at question **Accounts**. This category has been moved to sit underneath Current Accounts to help improve the level of accuracy within data collection.

b) **Credit Unions**

A credit union is a financial co-operative similar in many respects to mainstream building societies. Its members both own and control the credit union, which is run solely for their benefit. All members of a specific credit union must share what is known as a "common bond", ie they must be connected in some way or another to the other members of that credit union. For example they could be employed by the same employer, or live or work in the same area. All the members pool their savings together into a single 'pot' from which loans can be made to members from that credit union. Members who have deposited money into the credit union receive an annual dividend while those to whom money is lent have to pay interest on the loan.

Credit Unions have increased in popularity and will now form category 8 at the question **Accounts**.

Accounts	<p>SHOW CARD GGG</p> <p>"Which of these accounts do you have now, or have you had in the last 12 months?</p> <p>CODE ALL THAT APPLY</p> <ol style="list-style-type: none">1. Current account with a bank, building society, supermarket/store or other organisation2. Basic Bank Accounts including introductory/starter and Post Office card accounts3. National Savings Bank (Post Office) – Ordinary Account4. National Savings Bank (Post Office) – Investment Account5. TESSA (Tax-Exempt Special Savings Account)6. ISA (Individual Savings Account)7. Savings account, investment account/bond, any other account with a bank, building society, supermarket/store or other organisation8. Credit Union9. None of these
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The questions on interest and tax will also be asked of those respondents who have a Credit Union account.

AccInt	<p>“How much interest have you received altogether from any [Current/National Savings Bank Ordinary/National Savings Bank Investment / TESSA / ISA / Basic Bank Account / Savings / Credit Unions / other] accounts in the last 12 months?</p> <p>INTERVIEWER: FOR ANY JOINT ACCOUNTS, ONLY GIVE THIS RESPONDENT'S SHARE OF THE INTEREST</p>
AccTax	<p>“Can I just check, is that interest <u>after</u> tax or <u>before</u> tax? IF BEFORE TAX, ASK: have you signed a form to get the interest without paying tax? 1: After tax 2: Before tax – but tax payable 3: Before tax – signed form to get interest without tax INTERVIEWER: IF REGISTERED AS A NON-TAXPAYER, USE CODE 3.</p>

The following questions are also asked for those respondents who have a Credit Union account.

Intro	<p>Now I'd like to ask you about your [names of accounts coded at 'Accounts'], that you mentioned earlier. Do you still have these accounts?</p> <p>1: STILL has any such accounts/assets 2: ALL such accounts/assets now disposed of 3: Does not wish to give details of such assets</p>
KindOf	<p>ASK OR CODE Which accounts shall we deal with first?</p> <p>[LIST OF SAVINGS ACCOUNTS CODED AT 'ACCOUNTS'] (enter number between 2 and 8)</p>
AccDisp	[displays type of account which will be dealt with next]
AccName	<p>Is this account in your name only, or held jointly with someone else?</p> <p>1: Sole account 2: Joint account</p>
MuchAcc	<p>How much is in the [account]?</p> <p>ENTER WHOLE £s ONLY.</p>

5 ASSETS QUESTIONS

Higher or lower?

(Block: QAssets)

Interviewers have commented that the question **IncHiLo** works well now that the period of reference has been adjusted to 12 months rather than 3. However, a show card would constitute an improvement here in terms of providing a visual aid to reduce item non-response, so one has been introduced for the new survey year.

The question wording has also changed slightly, taking the new card into account.

IncHiLo	SHOW CARD LLL		
	<p>“I would like you to think about how much [higher or lower] your PRESENT income is, compared to 12 months ago. Which one of the categories on this card best describes your change in PRESENT income?”</p> <p>INTERVIEWER: PROBE TO CLASSIFY</p>		
	Annual	Monthly	Weekly
	£2,500	£200	£50
	£2,501 - £5,500	£201 - £450	£51 - £100
	£5,501 - 8,000	£451 - £650	£101 - £150
	£8,001 - 10,000	£651 - £800	£151 - £200
	£10,001 or more	£ 801 or more	£201 or more

Investment Companies with Variable Capital

(Block: QAssets)

A new type of investment is to be included in the FRS questionnaire for the new survey year. **Investment Companies with Variable Capital (ICVCs)** replace ‘Open Ended Investment Companies’ (OEICs). The investment group INVESCO Perpetual is proposing to convert its unit trusts into ICVCs in September 2003. Little difference exists between the existing unit trusts and the new ICVCs apart from the structure of the fund (an ICVC is a company rather than a trust) and the fact that ICVCs have a single price rather than a bid, much like OEICs. These are part of the same group as Unit Trusts and Investment trusts and will be collected at the question **Invests** in category 2. A help screen will also be added at **Invests** to clarify this. More information on ICVCs can be found in the Question Instructions.

Include Investment Company with Variable Capital under Unit Trusts / Investment Trusts (code 2).
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Invests	<p>NOW THERE ARE SOME QUESTIONS ABOUT INVESTMENTS</p> <p>SHOW CARD XX</p> <p>Do you have now, or have you had in the last 12 months any money in any of the investments shown on this card?</p> <p>They can be in your own name only, or jointly with someone else.</p> <p>1: Government Gilt-edged stock (including war loan)</p> <p>2: Unit Trusts/Investment Trusts</p> <p>3: Stocks, shares, bonds, debentures, other securities</p> <p>4: PEP (Personal Equity Plan)</p> <p>5: Profit sharing</p> <p>6: Company Share Options Plans</p> <p>7: Member of Share Club</p> <p>8: None of these</p>
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Endowments as Investments

(Block: QAssets)

Interviewers have found that endowments NOT linked to respondents current property have not been picked up in the FRS questionnaire. It is increasingly common that endowments linked to 'old property' are still held due to a decline in their value and it is therefore important for FRS to capture these.

At the question **OtInvA** a new category will be introduced to cover this.

OtInvA	<p>"SHOW CARD III</p> <p>Do you at present have any money in any of the investments shown on this card?</p> <p>1: Capital Bonds (National Savings and Investments)</p> <p>2: Index-linked Certificates (National Savings and Investments)</p> <p>3: Fixed Interest Certificates (National Savings and Investments)</p> <p>4: Pensioner's Guaranteed Income Bonds (National Savings and Investments)</p> <p>5: Save-as-You-Earn (National Savings and Investments/Bank/Building Society)</p> <p>6: Premium Bonds (National Savings and Investments)</p> <p>7: Income Bonds (National Savings and Investments)</p> <p>8: Deposit Bonds (National Savings and Investments)</p> <p>9: FIRST Option Bonds (National Savings and Investments)</p> <p>10: Yearly Plan (National Savings and Investments)</p> <p>11: Fixed Rate Savings Bonds (National Savings and Investments)</p> <p>12: Guaranteed Equity Bonds</p> <p>13: Endowment not linked to current property</p>
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The usual follow up questions will appear for this new investment category after the **More** question relating to it.

Intro	<p>“Now I’d like to ask you about your endowments not linked to current property that you mentioned earlier. Do you still have these?</p> <ol style="list-style-type: none"> 1. STILL has any such assets 2. ALL such accounts/assets now disposed of 3. Does not wish to give details of such assets
EndDat	<p>“Thinking of the [first/next] endowment when did you start it?</p> <p>INTERVIEWER ENTER YEAR</p>
EndPd	<p>“Over what period was your endowment over when you bought it?</p>
Amount	<p>“How much do you regularly pay?</p>
Pd	<p>“How long does this cover?</p>
More	<p>“Do you have any more endowments not linked to your current property?</p>

6 ADMIN BLOCK

Consulting Benefit documents 'later'

(Block: QAdmin)

Cases have appeared during the last survey year where interviewers have transmitted work back to the office with the code 'to be consulted later' entered at the question **Bookcard**. A hard check has been introduced at before transmission (**IntDone**) to ensure that this cannot happen.

SIGNAL

INTERVIEWER: "You have stated that there is still a benefit book to be consulted later. Please try and obtain accurate information from a book where possible. Otherwise amend the code appropriately".

7 SHOW CARD AMENDMENTS

The table below shows the changes to show cards this year. Almost every card has a different letter compared to that in the 2003-04 survey year (both years shown in the table below). There are a number of new cards, the main ones showing in the new deprivation block introduced this year (ZZ, AAA, BBB, CCC, DDD, EEE and FFF).

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
A		'TypeEd'		NEW CARD Nursery School/ Nursery Class/ Playgroup/ Pre-school State run Primary (including reception classes) Special school state run (e.g. for children with disabilities and special educational needs) Middle-deemed Primary School (State run or assisted) Middle-deemed Secondary School (State run or assisted) Secondary School (State run or assisted) Non-advanced further education/ 6 th form/ tertiary/ further education college) Any PRIVATE/ Independent school (prep, primary, secondary, City Technology Colleges) University/ polytechnic/ any other higher education Home Schooling	4
B	A	'NatId'	<i>ethnic</i>	3 cards for England, Wales and Scotland NB: NI version of this	
C	B	'Ethgrp'	<i>ethnic</i>	KEEP	
D	C	'Tenure'	<i>owns1 address.</i>	NB: NI version of this	
E	D	'Landlord'	<i>rents</i>	NB: NI version of this	
Removed	E	'OthWay'	<i>rents</i>	Removed	10
F		'TenType'	<i>rents</i>	NEW CARD 2 versions England and Wales Assured Shorthold Assured Regulated (tenancy must have started in 1988 or	10

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
				earlier) Resident landlord Let by educational institution Other type of let Scotland Short Assured Assured Regulated (tenancy must have started in 1988 or earlier) Resident landlord Let by educational institution Other type of let	
G		'OthWay'	<i>rents</i>	NEW CARD Crown tenancy/ licence (includes H.M Forces) Service occupancy (excludes H.M Forces) Business or agricultural tenancy Assured agricultural occupancy Asylum seeker let (issues by National Asylum Support Service NASS) Holiday let Other type of let	10
H	F	'RMPur'	<i>owns1</i>	KEEP	
I	G	'MortType'	<i>owns1</i>	KEEP	
J		'EndwPrin'	<i>owns1</i>	NEW CARD Current payments into a Pension Plan (pension mortgage) Current payments into a PEP or ISA Current payments into Unit Trust or Investment Trust scheme Current payments into any <u>other</u> savings/ investment scheme Proceeds of sale from existing house only	13
K	H	'MorAll'	<i>owns1</i>	AMENDED CARD - NEW diagram	14
L	I	'MorAll'	<i>owns1</i>	AMENDED CARD - NEW diagram	14
M	J	'SerInc'	<i>rents</i>	KEEP	

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
N	K	'OthPur'	<i>owns1</i>	KEEP	
O	L	'CTDisc' 'CT25D50D'	<i>countax</i>	KEEP BUT NB: NOT FOR NI	
P	M	'Charge'	<i>owns2</i>	KEEP	
Q	N	'Premium', 'NumPols', 'PolMore'	<i>polq</i>	KEEP	
Removed	O	'UseVcl'	<i>vehint</i>	Removed	
R		'Care;	<i>chcare</i>	NEW CARD Close relative (other than parents) Other relative Friend/ neighbour Childminder Nursery/ school/ playgroup Crèche Employer provided nursery Nanny/ Au pair After School or holiday Play Scheme	16
S	P	'NeedHelp', 'GiveHelp'	<i>careq</i>	KEEP	
T	Q	'Hour'	<i>ihour</i>	KEEP	
U	R	'DisDif'	<i>ihealth</i>	CARD AMENDED 1. Mobility (moving about) 2. Lifting, carrying or moving objects 3. Manual dexterity (using your hands to carry out everyday tasks) 4. Continence (bladder control) 5. Communication (speech, hearing or eyesight) 6. Memory or ability to concentrate, learn or understand 7. Recognising when you are in physical danger 8. Your physical co-ordination (e.g. balance) 9. Other health problem or disability	33
V	S	'Rstrct'	<i>ihealth</i>	KEEP	
W	T'	'Train'	<i>icurst</i>	CARD AMENDED Work based learning for young people/Youth	41

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
				Training (YT) Work based learning for adults (WBLA)/Training for Work (TfW) Work Trial New Deal 25+/Employment Zones/Project Work Career Development Loans / Youth Credits New Deal for Young People (18-24) New Deal 50+ New Deal for Disabled People Any other training scheme	
X	U	'NewDType'	<i>icurst</i>	KEEP	
Y	V	'RetReas'	<i>icurst</i>	KEEP	
Z	W	'EType'	<i>ijobdes</i>	CARD AMENDED Employee OR: Running a business or a professional practice Partner in a business or a professional practice Working for myself A Sub-Contractor (includes CI 55/6) Doing freelance work Self employed in some other way	38
AA	X	'WatDid'	<i>ijobdes</i>	KEEP	
BB	Y	'InclPay', 'InclPay1'	<i>iempjob</i>	CARD AMENDED Statutory Sick Pay Statutory Maternity Pay Statutory Paternity Pay Statutory Adoption Pay Income Tax refund Mileage allowance or fixed allowance for motoring Motoring expenses refund Tax Credit	24
CC	Z	'HHInc'	<i>iempjob</i>	NB: NI version of this	

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
DD	AA	'InKind'	<i>iempjob</i>	KEEP	
EE	BB	'OwnSum'	<i>iselfjob</i>	KEEP	
Removed	CC	'TaxCred'	<i>itaxcred</i> <i>April</i>	KEEP	
FF	DD	'TaxCred'	<i>itaxcred</i> <i>May</i>	KEEP	
GG	EE	'WTCLum'	<i>itaxcred</i>	KEEP	
HH	FF	'CTCLum'	<i>itaxcred</i>	KEEP	
Removed	GG	'NTCOrigin',	<i>itaxcred</i>	DROPPED - LATE CHANGE SO NO CARD II	
JJ	HH	'EmpPay'	<i>ipension</i>	KEEP	
KK	II	'EPLong' 'PPDat' 'SPDat'	<i>ipension</i>	KEEP	
LL	JJ	'EpType'	<i>ipension</i>	KEEP	
MM	KK	'Ben1Q'	<i>ibenef1</i>	KEEP	
NN	LL	'Ben2Q', 'B2QFut'	<i>ibenef1</i>	KEEP	
OO	MM	'Ben3Q', 'B3QFut'	<i>ibenef1</i>	KEEP	
PP	NN	'Ben4Q'	<i>ibenef1</i>	KEEP	
QQ	OO	'Ben5Q'	<i>ibenef</i>	CARD AMENDED A Back to Work Bonus 'Extended Payment' of Housing Benefit / rent rebate or Council Tax Benefit (4 week payment only) Bereavement Payment (paid in lump sum) Child Maintenance bonus / Child Maintenance Premium Lone Parent's Benefit Run-On Work Search Premium In-Work Credit Return to Work Credit	27

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
				Any National Insurance or State Benefit not mentioned earlier	
RR	PP	'GOVPay'	<i>benblock</i>	KEEP	
SS	QQ	'Ben7Q'	<i>ibenef4</i>	KEEP	
TT	RR	'AnyPen'	<i>iothinc1</i>	KEEP	
UU	SS	'Royal'	<i>iothinc1</i>	KEEP	
WW	TT	'PropRent'	<i>iothinc1</i>	KEEP	
XX	UU	'Allow'	<i>iothinc2</i>	NB: NI version of this	
YY	VV	'OddJob'	<i>iothinc2</i>	KEEP	
ZZ		'AddHol' 'AdDmel' 'AdShoe' 'AdDDec' 'AdDIns'	<i>afford</i>	NEW CARD 1. We have this 2. We would like to have this but cannot afford this at the moment 3. We do not want/ need this at the moment	22
AAA		'AdDMon' 'AdepFur' 'Af1'	<i>afford</i>	NEW CARD 1. We do this 2. We would like to do this but cannot afford this at the moment 3. We do not want/ need this at the moment	22
BBB		'AddHol' 'AdDmel' 'AdShoe' 'AdDDec' 'AdDIns' 'AfDep2' 'AdDepLes'	<i>afford</i>	NEW CARD 1. I have this 2. I would like to have this but cannot afford this at the moment 3. I do not want/ need this at the moment	22
CCC		'AdDmon' 'AdepFur' 'Af1'	<i>afford</i>	NEW CARD 1. I do this 2. I would like to do this but cannot afford it 3. I do not want/ need this at the moment	22

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
DDD		'CDepHol' 'CDepBed' 'CDepEqp' 'CDepCel'	<i>afford</i>	NEW CARD 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	22
EEE		'CDepSum' 'CDepLes' 'CDepTEa' 'CPlay' 'CDepTrp'	<i>afford</i>	NEW CARD 1. Child(ren) 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	22
FFF		'Debt'	<i>afford</i>	NEW CARD 1. Behind with the electricity bill 2. Behind with the gas bill 3. Behind with other fuel bills like coal or oil 4. Behind with Council Tax 5. Behind with insurance policies 6. Behind with telephone bill 7. Behind with television/ video rental or HP 8. Behind with other HP payments 9. Behind with water rates 10. Not behind with any of these	22
GGG	WW	'Accounts'	<i>iadint</i>	CARD AMENDED <u>ACCOUNTS:-</u> Current account with a bank or building society, supermarket/store or other organisation Basic Bank Accounts including introductory / starter and Post Office card accounts National Savings Bank (Post Office): Ordinary account National Savings Bank (Post Office): Investment account TESSA (Tax Exempt Special Savings Account) ISA (Individual Savings Account) Savings account, investment account / bond , any other account with bank, building society, supermarket/store or other organisation Credit Union	32

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
HHH	XX	'Invests'	<i>iadint</i>	KEEP	
III	YY	'OtInvA'	<i>iadint</i>	<p>CARD AMENEDED (now 2 cards)</p> <p>Card III (part 1) Capital Bonds (National Savings and Investments) Index-linked Certificates (National Savings and Investments) Fixed interest Certificates (National Savings and Investments) Pensioner's Guaranteed Income Bonds (National Savings and Investments) Save-As-You-Earn (National Savings and Investments/ Bank/ Building Society) Premium Bonds (National Savings and Investments) Income Bonds (National Savings and Investments)</p> <p>CARD III (part 2) Deposit Bonds (National Savings and Investments) FIRST Option Bonds (National Savings and Investments) Yearly Plan (National Savings and Investments) Fixed Rate Savings Bonds (National Savings and Investments) Endowment not linked to current property Guaranteed Equity Bonds</p>	23
JJJ	ZZ	'TotSav', 'Totsave'	<i>isave ichint</i>	KEEP	
KKK	AAA	'IncChnge'	<i>isave</i>	KEEP	
LLL		'IncHiLo'	<i>isave</i>	<p>NEW CARD</p> <p>Annual £2,500 £2,501-£5,500 £5,501-£8,000 £8,001-£10,000 £10,000 or more</p> <p>Monthly £200 £201-£450</p>	35

2004-2005	2003-2004	Question name	Source code file	AMENDMENT (in bold)	SPEC NO.
				£451-£650 £651-£800 £801 or more Weekly £50 £51-£100 £101-£150 £151-£200 £201 or more	
MMM	BBB	'IncOld'	<i>isave</i>	KEEP	
NNN	CCC	'NSAmt'	<i>isave</i>	KEEP	

Family Resources Survey (FRS) 2004-05

Assigning Income to Free School Meals

Recommendation for Change

Issue

To recommend a source and methodology for assigning income to families in receipt of Free School Meals.

Actions

Views and comments welcomed from all FRS users;

Lead users to respond on recommendation and carry out an impact analysis.

Timing

Responses required by 10th August

Recommendation

It is recommended that the FRS and associated series should assign income to free school meals based on estimates from UNISON, for primary schools and for secondary schools, uprated by RPI.

For the current survey year, 2004-05, this rate is:

	2004-05
Primary	£1.40
Secondary	£1.50

This rate will be used in the derivation of FRS income from 2004-05; applied as a point-in-time estimate. It is not proposed to adjust the back-series but this will be noted so users can make the adjustment if necessary.

Note: There is an outstanding issue over an appropriate back series beyond 2001-02.

Detail

Background

Since the initial investigation into assigning income to free school meals¹ users have provided comment on the issues of appropriate sources and methodologies.

This paper summarises these views and draws out a recommendation for the FRS and associated series.

Data Sources

It is agreed that the current estimates used for the price of a school meal cannot be supported by reliable data sources; all are based on estimates from around 1994 to 1996.

Whilst there is no single recognised source of information on school meal prices, over the last decade there have been various surveys and reports which give an indication on the prices for school meals.

¹ See [‘Free School Meals: An initial investigation into assigning income to free school meals’](#),

From consideration of these sources, the UNISON survey has emerged as the most favoured data source due to the frequency of release, size of the sample and the use made of the results. This study has already been conducted twice, in 1995 and 2001, and a further follow-up is planned for 2005. This survey is also informing the Government's new Healthy Eating in Schools initiative. It should be noted that the UNISON study only covers Great Britain; no source has been found for Northern Ireland.

Methodology

Three methodological aspects have been identified for discussion; these are *the rates to apply, uprating of non-annual estimates* and *the 'average' cost of a meal over the year*.

(i) Rates

The UNISON study shows a difference of around 8-9% between the cost of a meal at primary and secondary schools in Great Britain.

	1995	2001
Primary	£1.03	£1.31
Secondary	£1.12	£1.41

Source: UNISON, School Meals in the 21st Century

The UNISON study also identifies differences between local authorities; however, this is based on observations of the data provided by those local authorities who responded to the study. There were some local educational authorities who did not respond or refused to respond so whilst a national estimate has been published there is insufficient information for regional rates to be derived.

In choosing a rate level for the FRS, it is recommended that the distinction between the cost of a school meal at primary and secondary schools is taken into account but that no adjustment is made for regional differences.

(ii) Uprating

The UNISON report is currently published at five year intervals so any methodology will need to include uprating or the intervening years.

There are two recognised indices for uprating; the Consumer Price Index and the Retail Price Index. These are summarised below:

a. Consumer Price Index

Consumer Price Index	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
	2.0	2.5	2.5	1.7	1.7	1.4	0.8	1.7	0.6	1.1	1.6	2.0

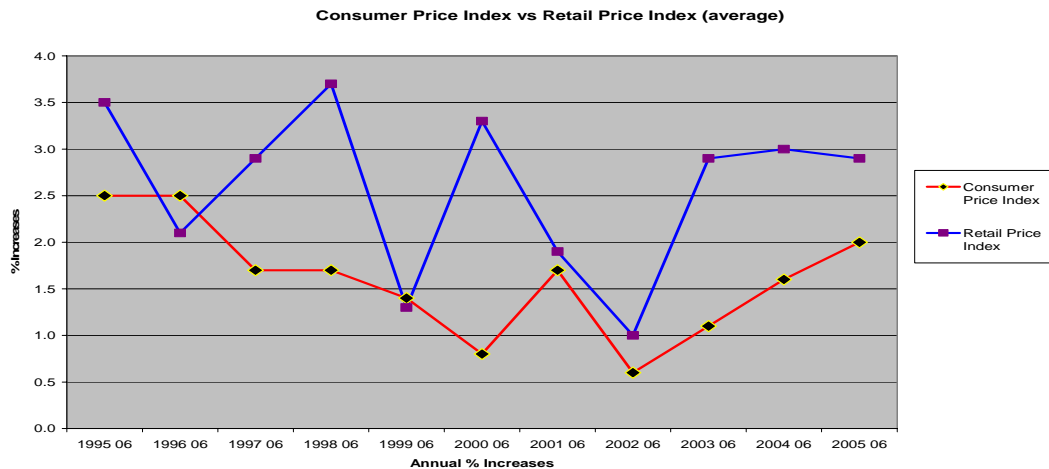
The FRS currently uses the Consumer Price Index (CPI) rate of inflation, sourced from the ONS report on average household expenditures.

b. Retail Price Index

Retail Price Index	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
	2.6	3.5	2.1	2.9	3.7	1.3	3.3	1.9	1.0	2.9	3.0	2.9

The Poverty Simulation Model (PSM) uses the Retail Price Index (RPI) rate of inflation, sourced from ONS.

The graph below shows a comparison of the annual average for the two series.



In considering these two series it should be noted that the 2001 UNISON report showed that the average cost of a school meal had risen above inflation, based on the RPI, between September 1995 and September 2001; school meals being 12p higher in 2001 than expected.

Since school meals have been seen to increase above inflation and the RPI is the higher uprater we can effectively rule out the CPI; although using RPI would be to recognise the use of an uprating series which is still too low.

The table below shows the series if the 1995 UNISON estimates were uprated by the RPI; with a further series shown in **bold** which represents RPI uprating using the 2001 UNISON estimates.

	1995-96 Base	1996-97	1997-98	1998-98	1999-00	2000-01	2001-02	2002-03	2003-04	2004-5	2005-6
Primary	1.03	1.05	1.08	1.12	1.13	1.17	1.19	1.20	1.23	1.27	1.31
							1.31	1.32	1.36	1.40	1.44
Secondary	1.12	1.14	1.17	1.21	1.23	1.27	1.29	1.30	1.34	1.38	1.42
							1.41	1.42	1.46	1.50	1.54

A further UNISON report, to be published towards the end of 2005, will offer an insight into the current inflation rate of school meal prices; however, in the meantime the recommendation for 2004-05 is to use the value of £1.40 and £1.50.

For time series analysis prior to 2001-02, users will need to decide whether to accept a discontinuity or down rate from 2001-02.

(iii) Average cost of a school meal across the year

Once a figure is obtained for the cost of a meal this needs to be added into the income definition. During user consultation there were different approaches suggested for this; however, due to the continuous nature of the FRS and the way in which the information on school meals is collected, we are recommending to retain the current approach.

To summarise this; the FRS treats income as income at a point-in-time. For the purposes of assigning income for free school meals this would be through assigning the full income to any free school meals taken during the reference period. For the FRS this means "Thinking just of the PAST SEVEN DAYS ending yesterday - how many school meals has/have your child/children had?"

As the FRS is a continuous survey, this will mean that during term times it will pick-up children receiving free school meals in the past seven days; whilst during school holidays it will not.

While this approach to collection will cause some families to report free schools meals and so have income assigned, and others to not be able to report free school meals, the overall effect will be to provide an average annual income estimate for free school meals across eligible families with children.

Recommendation

The recommendation of this review is that the FRS and associated series should assign income to free school meals based on estimates from UNISON, for primary schools and for secondary schools, uprated by RPI.

For the current survey year, 2004-05, this rate is:

	2004-05
Primary	£1.40
Secondary	£1.50

This series will be used in the derivation of FRS income from 2004-05; applied as a point-in-time estimate. It is not proposed to adjust the back-series but this will be noted so users can make the adjustment if necessary.

Next Steps

This paper presents a recommendation; however, the decision on whether this is accepted needs to be agreed by users.

We would encourage all users to consider this issue as this will have some impact on the general FRS income estimates; but, in particular, we encourage those users who either directly use estimates of school meal values or where interest is in groups where income from free school meals has particular impact, i.e. low income families.

The full year user consultation period on the 2004-05 FRS begins on 5th September and so to take this recommendation onboard before then we are asking for responses on this area **by 10th August.**

If you require any further information or would like to discuss please let me know,

Robert Chung
Family Resources Survey
Incomes Monitoring
Statistical Services, Information Directorate