



P2466

STUDY OF ENGLISH HOUSING

(2005/6)

FIELD INSTRUCTIONS

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1 Background and purpose of the survey

The Study of English Housing (SEH) is a continuous survey carried out on behalf of the Office of the Deputy Prime Minister (ODPM). It started in April 1993 and has two main purposes:

- *To provide regular information about the main features of people's housing and their views about their circumstances.* The survey comprises a main core of factual questions about, for example, tenure, housing costs and difficulties with mortgage/rent payments, housing history, intentions of moving and the type of home wanted, and this remains largely unchanged from year to year. The SEH also carries a set of questions on attitudes and intentions and these are substantially revised each year.
- *To provide information about the private rented sector* which, unlike the owner occupied and social rented sectors, is not covered by routine administrative statistics. There is particular interest in the privately rented sector because of legislation to increase the size of the sector in the 1988 Housing Act. Therefore, there is a separate module for all private tenants. This includes detailed questions about tenancy type, rent paid and housing benefit as well as some attitude questions.

2 Introducing the survey

2.1 General

The interview lasts, on average, half an hour. If you are interviewing at a household containing private renters, then the interview will be slightly longer (by how much depends on the number of tenancy groups found though usually there is only one).

When you do your introduction, you might want to mention some of the attitude questions that will be asked during the course of the interview as they can help with selling the survey. For example, most people have an opinion about dogs, litter or vandalism. Other 'popular' attitude topics in this year's study include crime, noise and traffic. Respondents will also be asked how easy it is for them to get to local amenities (such as a corner shop, post office etc).

2.2 Common questions and answers

What is the purpose of the study?

The purpose of the study is to provide ODPM with reliable information on a wide range of housing topics, which can be analysed by their staff and others to inform the development, assessment and monitoring of housing policies.

The survey is the main source of national information on the private rented sector. Unlike the owner occupied and social rented sectors, the private rented sector is not covered by any other routine statistics.

Why should I bother taking part?

By agreeing to take part, you will be helping to improve the quality of the information used by the Government of the day, to help it make decisions about how the available money should be shared between the many competing claims on the country's resources.

What does it involve?

I shall be using a laptop computer to ask the questions and record your answers. This is an efficient way of collecting survey information and most people find it quite interesting to take part.

I may not know the answer to your questions?

The survey is only concerned with your opinions and your household's circumstances. None of the questions are difficult or tricky.

How/why was I selected?

It is addresses that are selected at random from the Post Office's list of postcodes and this address just happens to be one of those selected.

Because we want to collect information about all the different kinds of households so that the results are representative of the country as a whole, it is very important that every selected household takes part. We cannot take substitutes because their housing circumstances might be different and that would distort the results.

What about confidentiality? You know my address.

Your name and address will not be included in the data that is put into the computer - only your answers to the questions, which are then combined with other people's answers. The results are then published in the form of tables and averages with commentaries. Individuals cannot be identified.

Could I or my household be identified through the answers we have given?

This is **very unlikely** as we take a lot of measures to ensure that confidentiality is preserved. Some details such as job description are only collected so that they can be turned into a general code for people's occupations after which they are removed.

3 Definitions and terms used on the SEH

The following definitions are particularly important on the SEH so you must familiarise yourself with them before you start interviewing.

Household

The standard definition of a household applies for SEH. To recap, a group is classed as one household if they share a dwelling and they

EITHER: Share at least one main meal a day
OR they share living accommodation

Normally, this will be a typical family.

Establishing residence at the address

People resident at a selected address can only be considered household members if it is their **main** residence. Second, weekend, or holiday homes can never count as main residences. However, SEH differs from most surveys by including people who are living temporarily at an address (i.e. for less than 6 months) if they do not have any other residence. For example, an individual who moves about staying with friends for short periods should be counted as part of the surveyed household if they have no other residence.

Apply the following rules if in doubt:

COUNT AS RESIDENT AT ADDRESS:

- People who are living temporarily at a selected address (i.e. for less than six months) AND do not have any other residence.
- Anyone who has been living at the listed address continuously, on a full-time basis, for six months or more, even if they have their main residence elsewhere.
- Children aged 16 or under who are away at boarding school
- Children of any age normally living at the address but temporarily away on a short course or temporary job likely to last less than 6 months
- Anyone normally resident at the listed address who has been in an institution (hospital, nursing home, prison etc) for less than 6 months.
- People who work away from home for whom this is their only fixed or main address (e.g. on business, in the armed forces, fishermen, oil rig workers or merchant seaman) provided they have not been continuously away for more than 6 months

DO NOT COUNT AS RESIDENT:

- Persons working away from home and who only come home for weekends or holidays and for whom this address is not their main address

- Students aged 16 and over who are studying or working away from their parent's address and only come back for weekends and holidays, even if the total of weekend and holiday time is more than term time.
- Spouses who are separated (whether or not they visit the household)
- Children who have been (or are expected to be in care) for 6 months or more
- Persons who have been in institutions for 6 months or more
- Members of the armed forces on extended tours of duty for 6 months or more, who will be away continuously
- Household members who have been away continuously for six months or more
- Anyone not sleeping at the address; to be counted as resident an individual must sleep at the address. Anyone who has their meals at on address but sleeps elsewhere must be included at the address where they sleep.

If you have problems applying these rules, ultimately the question of whether or not the address is the main residence should be decided by the respondent.

Household Reference Person (HRP)

The standard definition of Household Reference Person (HRP) as the Highest Income Householder applies for SEH (see *Interviewers Manual* p.66) and the SEH 'Questionnaire Instructions'.

Institutions and Communal Establishments

The standard definition applies on SEH. To re-cap, an institution or communal establishment is defined as one at which four or more people, not all related to each other, live and are catered for communally (i.e. by someone who is paid to provide them with board and lodgings).

Family Units

A Family Unit (FU) is defined as:

1. a person living in the household on their own
2. a married/cohabiting couple on their own,
3. a married/cohabiting couple and their never-married children, provided that those children have no children of their own,
4. a lone parent and their never-married children, provided that those children have no children of their own,
5. any individual who cannot be assigned to any of the above categories.

In general, FUs cannot span more than two generations unless a grandparent is acting *in loco parentis* and the child's parents are not in the household. In such instances, provided the grandchildren have no children of their own and have never married, then they and their grandparent(s) will be treated as one FU. The same applies to great-grandparent/child households.

The questionnaire program will work out the FUs, based on answers to questions in the household and relationship grids, but you will be asked to check the results.

Further information on FUs is given in the SEH Questionnaire Instructions.

Tenancy Groups

A Tenancy Group (TG) is the person or group of people covered by a single tenancy agreement. In some privately renting households, different members of the household may have separate agreements with the landlord and there will be a different TG for each separate agreement. There may also be subletting within the household. If one member of the household sublets to another, another TG exists.

Privately renting TGs may exist within households which own their accommodation, or rent it from a local authority or housing association. If such a household lets part of the accommodation to another household member, whoever is covered by the renting agreement forms a TG.

No individual can be a member of two different TGs and close relations in the same household cannot be counted as renting from one another.

Further information on TGs is given in the SEH Questionnaire Instructions.

Dwelling Unit

A Dwelling Unit (DU) is a part of an address which has its own front door. The front door does not have to be at street level, but it must separate one part of the address from other parts (i.e. only those who live behind the door have access to the area, it is not a communal part of the address).

A DU need not be fully self-contained - for example, an address may contain four bed-sitters, the inhabitants of whom share a bathroom. Each bed-sitter would count as a DU as long as it had its own front door.

For the SEH, you do not need to concern yourself with DUs whilst administering the questionnaire - the questionnaire itself deals only with households. The concept of a DU is only there as an aid to identifying households at multi-occupied addresses.

4 The Sample

4.1 Background to sampling

The sample for this survey is drawn from the 'small user' Postcode Address File (PAF). The PAF is the Post Office's list of addresses ('delivery points') and postcodes for Great Britain. The 'small user' PAF is the file of delivery points which typically receive fewer than 25 articles of mail per day. By using the small user file, we hope to avoid sampling large institutions and businesses. However, some small businesses or commercial premises may still get sampled and appear on your address list. In such instances, please remember that you must still call at the sampled addresses on your address list to check for private households.

This year, we will randomly select just over 29, 000 addresses. The sample is spread over England in such a way that different kinds of areas and households are represented. To ensure the sample is representative throughout the year, fieldwork is spread over the whole year.

Because the sample is taken from the PAF, strictly it is a sample of 'delivery points' (i.e. letter boxes), not a sample of named individuals or households living at these addresses. It is important to remember that there may be two or more households at any selected address (in other words, there is not necessarily a one-to-one correspondence between delivery points and households). You will be able to deal with such circumstances by following the instructions on the ARF.

4.2 The address list

An example of a PAF address list, as used on the SEH, is included for reference on page 11. At the top there is some general information about the assignment. This comprises:

Project Number (i.e. 2466)

Survey Name (i.e. Study of English Housing)

Fieldwork Month and Year

Field Area

There is also space for you to enter your name and interviewer number.

Main body of List

Most assignments, i.e. 25 addresses, will fit onto three pages of A4 paper. However, if the assignment contains a number of 'divided addresses' (see section 4.4) it may run to more pages. All sampled addresses will be separated with a straight ruled line.

If you have problems finding an address please refer to section 4.3 "Using grid references on PAF samples" and section 4.6 "Difficult to find addresses".

The information in the main body of the address list is presented in 4 columns. Reading from left to right these are:

1. **TYPE** This tells you what type of address you are dealing with (See further instructions on address types in section 4.4).
2. **SERIAL NUMBER** This is the full serial number for the address together with its check-letter. See further information on serial numbers in section 4. 5.1.
3. **ADDRESS /POSTCODE** The sampled address (including the postcode), and all information on the same line, will be in bold. Very occasionally, the house name or number may be omitted. If no extra information has been written in, please telephone the Orange Team in Brentwood for instructions.
4. **GRID REF** This gives the grid reference of the first address in the postcode shared by the sampled address. There are on average 17 addresses in each postcode. Although the grid reference may not be the precise one for the sampled address it is a useful aid. Only in an unusually large postcode area will the sampled address be far from the grid reference. See also section 4.3 for further information on using grid references on PAF samples.

You should also note the following point:

- At multi-occupied addresses you will be aiming to interview more than one household, and will need to generate extra serial numbers to deal with these. The first serial number for each address will always end in 01 (for household 01), however if you found a second household at the address the serial number will remain the same apart from the last two digits which then become 02 etc. Hence, the last digit of the existing serial number is augmented for each additional household you find. As any address may contain more than one household, we have printed out - for every address - a stock of spare numbers to be used when required.
- For each address, there is space to enter the final outcome code, the date the case was transmitted back to the office and details and any appointments and notes you wish to record. Should an address spawn additional households, record the outcome code and transmission date for the second and any subsequent households on the 'appointments/notes' line.

Example - Address list

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- apr 2005

FIELD AREA:6

TYPE SERIAL NUMBER ADDRESS INTERVIEWER:_____ INTNO:_____

GRID REF: 489550 199650

1 40301-08-01 T 28 WYCHWOOD RISE,GREAT MISSENDEN,BUCKS,HP16 0HB,,.

NEW HOUSEHOLDS: 02V 03W 04X 05Y 06Z 07A 08B 09C 10D 11E 12F

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

GRID REF: 487550 199450

3 168 WYCOMBE ROAD,

2 40301-09-01 C 168A WYCOMBE ROAD,PRESTWOOD,GREAT MISSENDEN,BUCKS,HP16 0HJ,.

NEW HOUSEHOLDS: 02D 03E 04F 05G 06H 07J 08K 09L 10M 11N 12P

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

GRID REF: 487050 199150

1 40301-10-01 L RESTCOTE,PERKS LANE,PRESTWOOD,GREAT MISSENDEN,BUCKS,HP16 0JG.

NEW HOUSEHOLDS: 02M 03N 04P 05Q 06R 07S 08T 09V 10W 11X 12Y

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

GRID REF: 485250 199950

1 40301-11-01 V SPRINGFIELD,BRYANTS BOTTOM ROAD,GREAT MISSENDEN,BUCKS,HP16 0JU,.

NEW HOUSEHOLDS: 02W 03X 04Y 05Z 06A 07B 08C 09D 10E 11F 12G

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

GRID REF: 487450 200350

1 40301-12-01 D 131 FAIRACRES,PRESTWOOD,GREAT MISSENDEN,BUCKS,HP16 0LF,.

NEW HOUSEHOLDS: 02E 03F 04G 05H 06J 07K 08L 09M 10N 11P 12Q

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

GRID REF: 487450 200550

1 40301-13-01 M 18 GRYMS DYKE,PRESTWOOD,GREAT MISSENDEN,BUCKS,HP16 0LL,.

NEW HOUSEHOLDS: 02N 03P 04Q 05R 06S 07T 08V 09W 10X 11Y 12Z

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

GRID REF: 487350 200450

1 40301-14-01 W 14 HAZELL ROAD,PRESTWOOD,GREAT MISSENDEN,BUCKS,HP16 0LS,.

NEW HOUSEHOLDS: 02X 03Y 04Z 05A 06B 07C 08D 09E 10F 11G 12H

FINAL OUTCOME:_____ TRANSMIT DATE:_____

APPT/NOTES:

4.3 Using grid references on PAF samples

All PAF addresses have an Ordnance Survey grid reference. This appears on your address list in column 4. They are useful for planning work in rural areas as some addresses do not fall within the post town shown on the address list. They are not as useful in urban areas where you will find a street map more practical.

To use a grid reference you first need a large scale Ordnance Survey map of your area. 1 : 50,000 or 1 : 63,000 are best.

The first 5 figures of the grid reference shown on your address list provide the reference for use along the bottom of the map. The second 5 figures the reference up the side of the map. (Refer to example map on page 13).

Please remember that not all grid references are accurate. You may find the odd error as the reference is provided for the first address in the post-code containing the sampled address and not the specific sampled address. It is only a guide to the locality of your sampled address rather than an accurate location. However, around 90% of addresses are usually within 400 metres of the grid-referenced address.

Grid references may still leave you unable to find some rural addresses. If you are having problems finding an address (rural or urban) please refer to section 4.6 "Difficult to find addresses" for guidance.

Example - How to use a grid reference

Example Map of Village Outside Whitworth

Example of how to use a grid reference

1. The sample address is 30, Woodland Drive, Whitworth and the grid reference is given 48840 31670.
2. The first 5 figures of the Grid Reference show the reference along the bottom of the map. The second 5 figures give the reference up the map.
3. Ignore the first digit in each case (4 and 3 in this example). These numbers only appear on the bottom left corner of the map.
4. Using the next 2 digits "88" and "16" look up and across the map to where the lines intersect. This will show you which square the address is in.
5. The 4th digits "4" and "6" further divide the square into 1/10ths (the 5th digit should be ignored). The point of intersection is the area you want.

INSERT MAP

4.4 Address types and divided addresses

4.4.1 Non-divided and divided addresses

Most addresses on your address list are "**non-divided addresses**", where there is only one entry on PAF - e.g. where the PAF listing would look something like:

4, Crofters Way
5, Crofters Way
6, Crofters Way
7, Crofters Way (and so on)

Some addresses are "**divided addresses**", where there is more than one part to the address listed on PAF - e.g. where the PAF listing might look like this:

Flat 1, 9 Crofters Way (first part)
Flat 2, 9 Crofters Way (second part)
Flat 3, 9 Crofters Way (third part)
Flat 4, 9 Crofters Way (last part)

4.4.2 Address types

Each address on your list will have one of **three** address-type codes:

ADDRESS TYPE = 1.

Most addresses on your address list will have this code. The majority of address type '1's are "non-divided addresses" (see section 4.4.1).

Divided addresses where any part **except** the last part is selected for the survey, are also given Address Type code = 1. You should therefore confine yourself just to this part of the address, ignoring all other parts. However, if you cannot find an exact match, contact the Orange Team at Brentwood. They will be able to check all the other addresses listed on the PAF in this area, and will be able to advise you accordingly. This service is only available during our normal office hours. For this reason, it's as well to devote time, on your first visit to the area, to locating all your addresses and identifying any potential problems that might need referring to the office.

ADDRESS TYPES 2 AND 3

Address type 2 and 3 addresses will always be shown together. The type 2 address is the sampled address and will be in **bold**. The type 3s are the other parts of that divided address which were on PAF, but which were not selected. They are listed for your information only, to enable you to carry out the following instruction.

- i) **Attempt an interview at the part of the premises carrying address TYPE = 2 (shown in bold)**
AND
- ii) **any other parts of the premises which you discover to be there, but which are NOT covered by a separate entry on your address list as an address TYPE = 3.**

The PAF, although fairly accurate, is not complete. Do not be surprised to find that one or more parts of an address may be missing from your list. You may find, for example, that you visit a block of 5 flats where only flats 1,3 and 4 are listed.

For the survey to be truly representative it is important that those parts of an address that are not listed on the PAF are given a chance of selection. They get this chance by being 'selected' along with the last part of an address.

For example, say that the following appears on your address list:

ADD TYPE	ADDRESS
3	FLAT 1, 1 OAK AVENUE
3	FLAT 2, 1 OAK AVENUE
3	FLAT 3, 1 OAK AVENUE
2	FLAT 4, 1 OAK AVENUE

The part of the address **selected for the survey** is the **type 2**, the one highlighted in bold - here, Flat 4. The **type 3** parts (Flats 1,2 and 3) were on PAF, but were not selected. They are on the list so that you know they have already had a chance of selection

Example: When you visit 1 Oak Avenue, you find Flats 1-4, as listed, but you also find Flat 5, Flat 6, and Flat 7 at the address, which are not on your address list.

Procedure: Comparing your address list with what you actually find at the address tells you that there are 3 **extra** flats (nos. 5, 6 and 7) at the address, that were not on PAF.

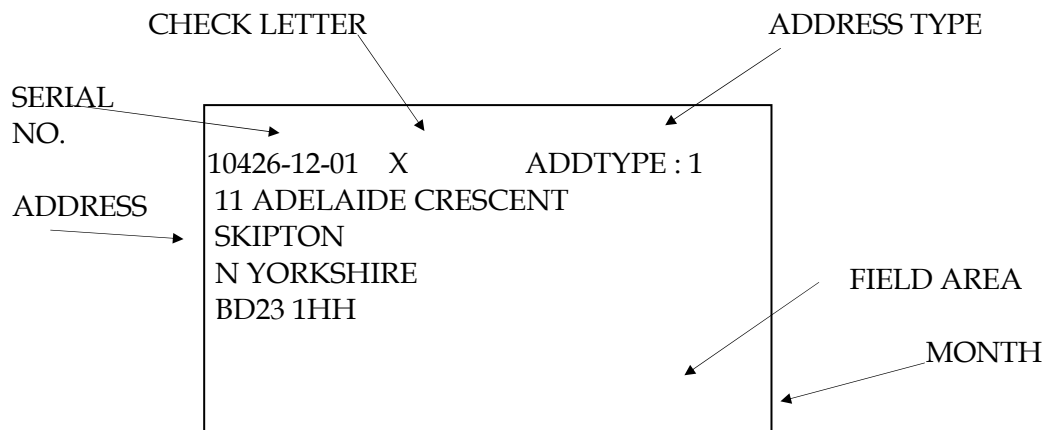
In this example you now 'expand' the issued address to encompass Flat 4 AND Flats 5, 6 and 7. Treating this as the entity that now needs to be dealt with, you should list all the DUs you find here - on the White ARF - and proceed as normal.

Comment: If what you found at the address had exactly matched your address list for 1 Oak Avenue, you would simply have attempted to interview at the selected part of the address only (i.e. type 2, Flat 4, highlighted in bold).

4.5 Address labels

In addition to your address lists you will be given a set of pre-labelled white ARFs - one for each address in your assignment.

There is space on the front of the white ARF for two labels. All the information given on the first label will also appear on your address list but in a different format. An example of the first label shown on the white ARF is as follows:



The second label on your main (White) ARF is for back-up information about the sampled address that may help you make contact there. We match the PAF with the electoral register and if we can come up with electoral names, they will appear on this label. However, it is of no importance if the listed person no longer lives there: it is the current occupants that we are interested in.

We also match the PAF against telephone directories: an asterisk on this second label indicates that the Orange Team in Brentwood will, during normal office hours, be able to provide you with a telephone number for the address.

4.5.1 Serial numbers

The serial number is made-up from three components: **area**, **address** and **household**.

The **area** comprises :

- the **quarter** of the survey year (Quarter 1 is April-June etc),
- the **calendar month** (01-12, i.e.. 1 = January etc),
- the **point** (i.e. the postal delivery point) within month (01-98).

The **address** and **household** numbers each comprise two digits: the address number ranges from 01-25 (covering the 25 addresses in an assignment) and the household number will be 01 for the first household (and will be augmented as necessary at multi-occupied addresses – see section 4.7).

So, the serial number 10426-12-01 (as shown on the example label in section 4.5) denotes that the case is from quarter 1, month 04 (April), point 26 (these three components make 10426) , the address is number 12 and the household number is 01.

The area, address and household numbers are followed on the label by a letter (X, in this example). This is the '**Check Letter**' which you will be asked to enter, each time you go into the questionnaire program for this household (see also section 4.5.2).

4.5.2 Use of 'Check Letters' on Serial Numbers

Each time you go into a questionnaire on your laptop, you will be asked to consult the ARF for that address and enter the 'Check Letter' for the appropriate household. (This is an important feature which helps protect against your selecting the wrong questionnaire for an address by mistake.) The Check Letter for Household No. 01 is printed next to the serial number on the address label and is the one to use in all normal circumstances.

At addresses where you find more than one household, you should consult the address list for the check letter to use for Household No. 02 and any others you may find.

Note that:

- (i) the alphabet is treated as circular, i.e. after Z, you come back to A, and so on.
- (ii) the letters I, O, U are omitted, so you need to treat the alphabet as having only 23 letters with these three excluded.

4.5.3 Check Letters for 'Practice' Serial Numbers

A set of SEH practice questionnaires will be installed on your laptop. You do not have Address Labels for these questionnaires, as they are not 'live' addresses. A separate list of Check Letters will be provided for these questionnaires.

All practice questionnaires come under '35 Northampton Square' so, at **AdrField**, when you are prompted to enter the first 10 characters of the address, enter '35 Northam' remembering to leave a space between '35' and 'Northam'.

4.6 Difficult to find addresses

The PAF address list does not show the names of occupiers at each address. As a result some rural or obscure addresses can prove difficult to locate. Experience has shown that the most effective methods of locating difficult addresses are:

- Asking local people.
- Asking at a local Post Office or Sorting Office.
- Asking the police.

If after consulting maps, visiting the area and enquiring locally you still cannot locate an address, you can check the address on the Electoral Register yourself and obtain a surname if we have been unable to provide one on the second label (of the white ARF). Some Sub Post Offices have a copy of the Electoral Register to hand and may be willing to help you or you will find a copy in the local library.

4.7 Multi-dwelling unit and multi-household addresses

Most addresses in your assignment will comprise just one dwelling unit (DU) and this will contain just one household. However, about 2% of all addresses are multi-occupied and the proportion may be much higher in large cities. You may, therefore sometimes come across an address which contains more than one DU and/or more than one household.

For example: you may arrive at 34 Crofters Way. You discover that this Victorian property has been converted into four bed-sitters which are not separately listed on the PAF, but which all have their own front door inside the building. These 4 front doors comprise 4 separate DUs (see section 3 for definition of a DU).

We may also have sampled 38 Crofters Way, another Victorian property but this time, the door at street level is the only front door: there is only one DU at this address. However, when you get inside, you discover living there a family and a lodger who does not share living space nor meals with the family. Hence, 38 Crofters Way comprises just one DU but two households.

On the SEH, you must enumerate all DUs and households at an address. Whilst it is possible that you could find multiple DUs and multiple households at the same address, this should be a relatively rare occurrence. In any event, the ARF will take you through the necessary steps but you should still familiarise yourself with the procedures before visiting any addresses.

4.7.1 Address Record Forms (ARFs)

To fit in with the fact that an address might contain multiple DUs and any DU might contain multiple households, SEH uses 3 ARF variants, reflecting this hierarchy. The main functions of the three ARFs and their usage are described below.

1. Main ARF (white)

Functions:

- Establishes whether the address is eligible;
- Identifies deadwood addresses;
- Enumerates DUs, & generates extra DU ARFs if needed. One DU remains on Main ARF;
- Enumerates households in the DU on this ARF, & generates extra household ARFs if needed. One household remains on this ARF;
- Records outcomes for this household.

You will receive a pre-labelled white (main) ARF for each address in your assignment. Questions 1 to 5 on this ARF deal with the **address**. Remember it is the **exact** address as given that counts. If the address on the label is 'Flat 4, 26 Bury Road', it is **that** part of the accommodation that is the sampled address, not the whole of no. 26.

If you find that the sampled address contains two or more DUs (e.g. flats, bed-sitters), question 5 takes you through the steps necessary to list the occupied and empty DUs. You must do this systematically and in sufficient detail so that you, or someone else, could re-visit.

If you are not sure as to whether a DU is occupied or empty, you should treat it as occupied.

As already mentioned, almost all addresses contain just 1 DU (and that comprises just one household). However, you will interview all occupied DUs found at a sampled address. There is space on the ARF to record the details of 12 DUs but in the unlikely event that you find 12 or more occupied DUs, you should record the details of number 13 onwards on a separate sheet. You should also contact the Orange team for advice about how to proceed. Continue to use the white ARF for the DU of the person contacted so far and transfer all other selected DUs to new **blue** ARFs.

At question 7, you will then describe and enumerate the households within this (first) DU. You should attempt to interview at all households found within this and all other occupied DUs.

You should treat the household of the person contacted so far as Household No. 01. Complete the remainder of the white ARF (questions 9a-9d) for this household and the interviewer observation of address questions (10a-10b). All other households should be transferred to **green** ARFs.

DWELLING UNIT ARF (Blue)

Functions:

- Enumerates households in the DU on this ARF, & generates extra household ARFs if needed. One household remains on this ARF;
- Records outcomes for this household.

A blue ARF is generated for each extra DU found on the main ARF. Your first tasks when starting a new blue ARF are:

- to transfer the address and the description of the DU from the main ARF,
- to transfer the Serial Number from the main ARF but using a new Household No. (i.e. taking the next available one from those supplied on your Address List).

The blue ARF then replicates the white ARF from question 7 to 9d (questions 1 - 6 only occur on the white ARF and are not applicable here). At question 7, you should enumerate the households found within this DU.

You should attempt to interview at ALL households within your DUs. The first household within the DU should remain on the blue ARF and all other households should be transferred to a green ARF.

HOUSEHOLD ARF (Green)

Function:

- Records outcomes for this household.

A green ARF will be generated for every extra household found on either the Main (white) ARF or a DU (blue) ARF. You should note the colour of the generating ARF in the space provided on the front page of the green ARF. You should then:

- transfer the address and the description of the DU from the generating ARF to this household ARF,
- transfer the Serial Number from the generating ARF but using a new Household No. (i.e. taking the next available one from those supplied on your Address List).

The green ARF then replicates the main (white) ARF from question 9a to 9d (questions 1 - 8 only occur on the white and/or blue ARFs and are not applicable here). At Question 9a, you should code the outcome for this household then, if applicable, go onto questions 9b-9d.

4.7.3 *General guidance when interviewing at multi-DU/multi-household addresses*

Where you are interviewing more than one DU or household at an address, always try to do all the interviews in the same week in order to prevent second-hand versions of the survey being passed from one household to the next.

You should return all the ARFs (white, blue and green) to the Orange Team at the end of the fieldwork period. Please also return any unused ARFs so that we can recycle them for use in later months.

If you hit an area which generates a large number of additional households, get in touch with your Area Manager (or their nominee) as soon as possible, so that extra help can be provided. This is another good reason for starting off by locating all your addresses, to identify any potential problems.

4.8 **Institutions and communal establishments**

The standard definition applies on SEH (see section 3 and also your "*Interviewers' Manual*")

IF THERE IS A PRIVATE HOUSEHOLD USUALLY RESIDENT AT THE INSTITUTION/COMMUNAL ESTABLISHMENT interview the private household(s), provided that the institution is their main or only address.

The instructions for dealing with addresses divided into parts (see section 4.7) also apply to addresses which are institutions. If the address has more than one part you should include private households at all parts unless instructed otherwise.

For example, if the only address listed on the PAF was "Manor Hall Boarding School" and you found a "Headmaster's Cottage, Manor Hall Boarding School", you should include private households living at the headmaster's cottage and any at the school. If, however, "Manor Hall Boarding School" was the sampled address and the "Headmaster's Cottage" was also listed on the PAF, you should not include private households living at the headmaster's cottage.

You should direct any queries about PAF entries to the Orange Team.

4.8.1 *Military establishments*

If an address assigned to you turns out to be a private address located within a military establishment (for example, a naval base or army barracks), you should notify the Orange Team at Brentwood immediately. They, or one of researchers, will then write to an appropriate person at the military establishment, asking for access to be granted. You will be sent a copy of this letter.

5 Advance notice of your visit

5.1 Advance letter

You will be given a supply of advance letters and white pre-paid envelopes carrying the OHMS logo. You will receive a pre-addressed letter for each of the 25 address in your assignment. Ensure that you enter your full name in the space provided at the bottom of the letter and also add the date of posting.

You should post the advance letters to each household to arrive a couple of days before you plan to make your first visit there (you may find it helpful to note the day of posting on the main (white) ARF).

Unfortunately, not all letters arrive (or are remembered by respondents) so do carry spare copies of these to give to these respondents. It important to do this in case the respondent wishes to contact one of the researchers or the Orange Team, after you have left. You will also need to carry spare copies in case you need to leave letters with extra households found at multi-occupied addresses.

5.2 SEH leaflet

In addition to the standard *National Centre* leaflet, you will be given a supply of leaflets specific to the SEH. This leaflet provides information on the content of the survey as well as results from previous years of the SEH. It is up to you to decide when you want to give out the SEH leaflets: you may want to use them to encourage reluctant respondents to take part (i.e. by showing them what kinds of questions are asked and how the results are used). Alternatively, you may want to leave one with a respondent at the end of an interview. The leaflet also has the web address of the SEH section of the ODPM web-site.

5.3 Contacting Procedure

Your assignment will consist of 25 addresses for each survey month. We recommend that you make contact with addresses as early on in the field period as possible. There are two reasons for this:

- so that you can identify any multi-occupied addresses as early as possible : it will not help you, nor the survey response rates, if you only discover multi-occupied addresses late on in the field period when you no longer have enough time to interview at them all, or to call on extra help.

If you make contact with addresses early on, you can plan and spread your work accordingly. You will also then be in a position to inform your Area

Manager (or their nominee) if you think that your assignment has generated too many households for just one interviewer to cope with in the allotted time (in such cases, we will consider splitting the assignment between two interviewers, but we need to know about this early in order to ensure an interviewer is available).

- We are also contracted to keep the non-contacts to a minimum so you should try to contact all addresses early in the period so that you can adjust your work plans to allow for those who are away/difficult to contact etc.

Ensuring that you are able to complete your work within the permitted number of days will require careful planning. Points you may find useful to remember are:

- you do not have to deal with addresses in serial number order;
- group your addresses and call on them in the order that is most economical;
- if you have any problems in completing your assignment, contact your Area Manager (or their nominee) immediately;
- extensions to the permitted number of working days will only be allowed in exceptional circumstances and only with the permission of your Area manager (or their nominee);
- all interviewing should be completed during the fieldwork period (i.e. within 3 weeks from the 12th of the month).

5.4 Response

As always, it is very important to achieve a high response rate on this study. Please keep trying to contact all 25 issued addresses until the end of the fieldwork period, and call back as often as you can while you are still in the area. If you sense a respondent may be about to refuse it often helps if you withdraw (perhaps leaving an SEH leaflet for them to read?), offering to call again at a more convenient time, before a formal refusal is actually given. Only by interviewing as many as possible of those selected for the sample can we at the *National Centre* be confident that the answers you get are representative of the views of everyone.

To help achieve a good response rate, we are asking you to:

- call the Orange Team at Brentwood before you return any incomplete or untraceable addresses. We might be able to find out some information which will help you locate 'hard to find' addresses;
- return all completed paper ARFs and computer admin. work for other deadwood addresses (vacant premises, etc.) to the Orange Team at Brentwood as soon as possible. We need to know what deadwood there is as early as possible in the fieldwork period;
- for refusals: complete the ARF and the computer admin. and return them straight away to the Orange Team at Brentwood. This is particularly important if you are

working in the last month of a quarter (i.e. on a June, September, December or March assignment);

- if a household proves hard to contact, breaks an appointment, etc., keep on trying to 'convert' him/her until the end of the fieldwork period, even if you have already made four calls. Then whenever you are in the neighbourhood try again, unless you have learned that the household will not be available until after the end of the fieldwork (due to holiday, illness, etc.) Complete the ARF and the computer admin. and return them to the Orange Team at Brentwood at the end of your assignment.

You must never substitute one address for another. The sample has been randomly selected, and any substitutions would lead to bias in the results.

6 The SEH interview

6.1 Whom to interview

Usually, only one adult per household will be interviewed. This should normally be the HRP or their partner.

The routing through the questionnaire is exactly the same whether you're interviewing the HRP or their partner (which is why either is an acceptable respondent). However, you should be aware that some questions (such as employment, length of residency at the address) will always be asked about the HRP, even if you are interviewing the partner.

If you can't interview the HRP or their partner in person then section 6.2 provides guidance on when proxies are an acceptable alternative. Proxies take a much shorter route through the questionnaire as, for example, the attitude and income questions are not asked.

The only circumstances in which you need to interview more than one person is in households which comprise two or more Tenancy Groups. On these rare occasions, you will attempt to interview a representative of each Tenancy Group (normally the Tenancy Reference Person (TRP) or their partner).

6.2 Proxy interviews

In certain circumstances it is permissible to take a proxy interview rather than lose information about the household. For all references to HRP/partner in this section, the same conditions apply to TRPs/partner.

6.2.1 When to take a proxy interview

- (a) When the HRP/partner is senile, has learning disabilities or is totally deaf.
- (b) When the HRP/partner is ill and is not well enough to see you before the end of the field period.
- (c) When no contact can be made with the HRP/partner during the field period, e.g. when the HRP/partner is away or in hospital for the whole of the remaining field period.

Note: If you are told by another member of the household that the HRP/partner is "never in", you should still recall several times in the hope of seeing them in person before resorting to a proxy interview.

- (d) When the HRP or partner is "too busy" or "not interested in this sort of thing", provided they give permission for the proxy to take place. You should always recall to explain the survey in person before accepting a proxy. Under no circumstances should you take a proxy because another member of the household states the respondent is "too busy" or "not interested in surveys".

There may be other circumstances when it would be sensible to take proxy information. In such cases you should telephone the Orange Team at Brentwood for advice. Whenever proxy information is taken you must make a note giving your reasons why the proxy was necessary.

6.2.2 *Permission to take a proxy*

Whenever possible you should ask the HRP/partner for permission to take proxy information before interviewing another member of the household on his or her behalf. This is particularly important in the case of those who are "too busy", "not interested", or "never in", because this might be their way of telling you that they do not want to be interviewed.

Note: If you do not see the HRP/partner in person ask another household member to obtain their permission for you. (Remember there are some situations where you may accept a proxy interview without the HRP/partner's permission e.g. if the person in question is senile or away until after the end of the field period etc.).

Proxy information is best obtained from a close relative. In some cases such as when trying to interview the elderly this might not be possible. Use your judgement and consider such issues as maintaining good public relations and confidentiality. If you have any doubts telephone the Orange Team for advice.

6.3 **Structure of the interview**

The interview is structured in two parts comprising of a Household Schedule and a Tenancy Group (i.e. private renters) module.

Household Schedule

This should be conducted with either the HRP or their partner. The household schedule covers general housing topics asked of all households and has sections for owners and social renters. The interview lasts, on average, less than 30 minutes.

Private renters module

This module is addressed to people who rent from a private landlord, or whose accommodation goes with their job, or who pay rent to the HRP ('Subtenants'). It is normally carried out with the TRP or partner. The Questionnaire Instructions give full

information on how Tenancy Groups (TGs) are defined and how relevant people are allocated to TGs.

A TG interview must be carried out with each TG in the household (there is usually only one).

You can, if necessary, arrange appointments to interview TGs on different occasions. (If an appointment is not kept and cannot be re-arranged and you are only able to interview some of the TGs, this counts as a 'partial' interview).

6.4 What to say when a check appears (general guidance)

There are two kinds of check:

- **soft-checks [Active Signals]:** mainly, these safeguard against extreme or implausible answers. They can be over-ridden if the answer is correct.
- **hard-checks [Errors]:** these are used for logical impossibilities or to enforce hard rules. The inconsistency must be resolved before you can continue.

If a "check" appears you should take the following action:

- (i) **CHECK THE SCREEN:** Is the answer, as recorded, the answer that you intended to put in? If not, rectify the mistake. Explain to the respondent that you pushed the wrong keys in error creating an answer that the computer couldn't accept.
- (ii) **IF YOU HAVE ENTERED THE ANSWER CORRECTLY** query it with the respondent. Be polite and use terms which do not apportion blame: e.g.

"Can I just check that I entered that answer correctly? It says ... (Describe the substance of the MESSAGE which appeared)".

This leaves open, from the respondent's perspective, the question of whether they gave you an inappropriate answer, or that you made a mistake when entering the answer. You should then be able to alter the answer or over-ride the (soft) check if the recorded answer is correct without any upset

For a HARD check, if you have to go back and change an answer, you can first check with the respondent if what you have just entered is correct. If so and you are still instructed to change it or an earlier code, just say something like:

"Oh, the computer is telling me to just go back and confirm an earlier code – it will just take a few seconds". [Then go back and adjust codes if necessary - quietly].

NEVER SAY :

"The computer says that's wrong" or "I have to change your answer", etc.

7 The Admin Block

The questions asked will depend on the colour of ARF used for recording a household's final outcome, but in all cases we have tried to keep the SEH admin block as short and simple as possible.

For full or partial productive cases, the outcome code will be computed by the laptop for you (you will just have to confirm that the correct code has been assigned). For other outcomes, you should transfer the outcome information from the ARF.

For non-productives, you should complete the Admin block as soon as you are ready to send the ARF to the Orange Team at Brentwood.

Whenever you are asked to transfer information from the ARF, please transfer your answers exactly as they are on the ARF, following the instructions on the screen.

You must complete an Admin block for every serial number, including unproductives, deadwood and office refusals. Failure to complete all Admin blocks will prevent you from doing your end of assignment clearout.

More detailed information about the Admin block and outcome codes can be found in the SEH Admin instructions.

8 General Admin

i) **Returning work**

Work should be returned via standard modem procedures.

ii) **End of assignment clearout**

You will be sent a blue back up disk for the end of assignment clearout. This should be returned to the Orange Team at Brentwood with your final batch of work.

Please note that your assignment will not be accepted as complete until the clearout has been done.

iii) **Backup disks**

It is essential that each day's work is backed up onto the backup disk so that there is always a spare copy (in case of disasters!) of the work you have carried out (Admin. as well as interviews). Always keep your backup disk at home - separate from your computer and other disks. Use the **Backup** option in the MAIN MENU to do your backups.



P2466

STUDY OF ENGLISH HOUSING

QUESTIONNAIRE INSTRUCTIONS

April 2005 v2

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Introduction

Background

The SEH is a large continuous survey carried out for the Office of the Deputy Prime Minister (ODPM). It started in April 1993 and has **two main purposes**:

- *To provide regular information about the main features of people's housing and their views about their circumstances.* For example, it covers tenure, housing costs and difficulties with mortgage/rent payments, housing history, intentions of moving and the type of home wanted, and attitudes to the present accommodation area.
- *To provide information about the private rented sector* which, unlike the owner occupied and social rented sectors, is not covered by routine administrative statistics. There is particular interest in the privately rented sector because of legislation to increase the size of the sector in the 1988 Housing Act. Therefore, there is a separate module for all private tenants. This includes detailed questions about tenancy type, rent paid and housing benefit. There are also some attitude questions about topics such as how well the informant gets on with their landlord, how easy it was to find their accommodation and future tenure expectations.

Structure of Interview

The SEH interview has two modules: a household module and a tenancy group (i.e. private renters) module.

- The household module is carried out with the Household Reference Person (HRP) or their partner in each sampled household¹. It covers general housing topics asked of all households and has sections for owners and social renters. The interview lasts, on average, about 25-30 minutes.
- The tenancy group interview is addressed to private renters, that is, people who rent from a private landlord, or whose accommodation goes with their job, or who pay rent to the HRP ('Subtenants'). It is normally carried out with Tenancy Reference Person (TRP) or partner. It must be carried out with each tenancy group in the household (there is usually only one).

An Admin block must be completed for each household sampled.

¹ Occasionally, it may be necessary to interview another responsible adult member of the household (see Field Instructions)

Summary Structure of SEH Interview

Household Module (Asked of each household)	
<i>ALL</i>	Household composition and relationships HRP characteristics Type of accommodation Second homes Tenure Identifying leaseholders Subletting Rooms and accommodation characteristics Council tax Length of residence
<i>RESIDENT LESS THAN 3 YEARS</i>	Moves and housing history
<i>ALL</i>	Repossessions Attitudes to accommodation and the area Car Ownership
<i>OWNERS</i>	Present accommodation Mortgage type, cost and arrears Previous experience of owning Mortgage equity
<i>COUNCIL AND HOUSING ASSOCIATION TENANTS ('SOCIAL RENTERS')</i>	Experience of owning Tenancy transfers Attitudes towards level of rent Housing Benefit and rent payments
<i>ALL WHOSE PREVIOUS PERMANENT ACCOMMODATION WAS PRIVATELY RENTED (EXCEPT CURRENT PRIVATE RENTERS)</i>	Relationship with landlord Withheld deposits
<i>ALL</i>	Employment and occupation/industry of HRP Income group of HRP (and Partner) Household Income
<i>RIGHT TO BUY LEASEHOLDERS</i>	Service charges Sale of property
<i>PRIVATE RENTERS</i>	Allocation to tenancy groups
Private Renters Module (Asked of each tenancy group in household)	
<i>ALL PRIVATE RENTERS</i>	Tenancy group composition Tenancy characteristics Attitudes to security of tenure, mobility Rent, services and Housing Benefit Relationship with landlord Buying expectations and preferences Securing the accommodation Rent arrears
<i>IF RECEIVES HOUSING BENEFIT</i>	Effect of changes to Housing Benefit
<i>ALL PRIVATE RENTERS</i>	Relations with the landlord
<i>IF TRP IS NOT HRP OR MORE THAN 1 TENANCY GROUP IN HOUSEHOLD</i>	Moving history Withheld deposits Employment and occupation of TRP Tenancy group income
Admin Block (completed for each occupied household at address)	
<i>ALL</i>	Admin

Conventions in the SEH Blaise program

QUESTION TEXT WRITTEN IN CAPITALS

should not be read out to the respondent. It represents an instruction or explanation to you, the interviewer.

[*] displayed at the beginning of question text denotes that it is an opinion question. You should read out the question exactly as it appears on the screen. The interpretation of the question must be left to the respondent: even if they say they do not understand the question, all you can do is repeat the exact text back to them. Never try to interpret the meaning for them.

SPONTANEOUS ONLY

Answer codes preceded by SPONTANEOUS ONLY should never be read out, prompted, nor probed. For example, in the following question, you would only record 'no opinion' if the respondent volunteered the information without probing or prompting.

Satten	Taking everything into account, to what extent do you personally agree that being (tenure type) is a good way of occupying a home? 1. Agree Strongly 2. Tend to Agree 3. Neither Agree nor Disagree 4. Tend to Disagree 5. Disagree Strongly 6. No Opinion (Spontaneous Only)
---------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

ASK OR RECORD

This means that you may already know the answer to the question, either because the information has already been recorded earlier in the interview or because the respondent may have already volunteered the information. Take for example the following question which asks about marital status of adult household members. If you already know that someone is married, you do not have to read the entire question out again. However, to guard against errors in coding or incorrect presumptions, you should check the details back with the respondent, for example, *'you have already told me that is your husband so I can code that you are married?'*

Marstat	ASK OR RECORD. CODE FIRST THAT APPLIES. INTERVIEWER: IF SPOUSE HAS BEEN LIVING ABROAD CONTINUOUSLY FOR MORE THAN SIX MONTHS, DO NOT INCLUDE THEM IN THE LIST OF HOUSHOLD MEMBERS. Are you/is ...single, that is, never married, ...married and living with your husband/wife, ...married and separated from your husband/wife, ...divorced or widowed?
----------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

RUNNING PROMPT

This means that you should read out all the answer codes up to the question mark. For instance, in the following question about mortgages, you would read out all three answer codes.

Buy	You said earlier that you/ <i>name</i> never had a mortgage on this accommodation; did you/ <i>name</i> ... RUNNING PROMPT... ...buy this house/flat, ...inherit it, ...or acquire it in some other way?
------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

INDIVIDUAL PROMPT

If this instruction is displayed, it means that you should read to the first question mark, then wait for (and if appropriate, record) an answer to that part of the question before moving on. You should then read to the next question mark, waiting for an answer to that part of the question before moving on and so on.

So, in the following question, you would ask whether the respondent had to pay a returnable deposit or fee before moving on and asking about a non-returnable premium or fee. As with 'SPONTANEOUS ONLY CODES' mentioned below, text appearing after the final question mark (in this case 'NO DEPOSIT OR FEE REQUIRED') should not be read out.

Bond	To get this accommodation did you/ <i>name</i> have to pay either of the following... a returnable deposit to cover damage?, a non-returnable premium or fee?, NO DEPOSIT OR FEE REQUIRED.
-------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Also see section 7 in the *Interviewers' Manual* for further information about administering questionnaires.

Question instructions

AdrField PLEASE ENTER THE FIRST TEN CHARACTERS OF THE FIRST LINE OF THE ADDRESS TAKEN FROM A.R.F. ADDRESS LABEL FOR THE FIRST HOUSEHOLD AT THIS ADDRESS.
MAKE SURE TO TYPE IT EXACTLY AS IT IS PRINTED.

When you go into a questionnaire for the first time, you will be prompted to enter the first 10 characters of the address. You must enter the address exactly as it appears on the first label on the white ARF.

Start Dat ENTER DATE INTERVIEW STARTED

This is the actual date of interview and must be correct as it is used a reference period for later questions.

The Household Grid

The standard definition of “household” applies for the SEH (See *Interviewers’ Manual*).

Name RECORD THE NAME (OR A UNIQUE IDENTIFIER) FOR EACH MEMBER OF THE HOUSEHOLD.
INCLUDE ANYONE LIVING HERE TEMPORARILY OR INFORMALLY, AS LONG AS IT IS THEIR MAIN RESIDENCE.
WHEN ALL HOUSEHOLD MEMBERS HAVE BEEN ENTERED, PRESS PgDn

The question asking for people’s names is just to make it easier for you to keep track of which member of the household you are talking about. There is no need for full names or, indeed, for names at all if the informant does not want to give them. A relationship to HRP or title (“aunt”/“Mrs”) will do but **enter something that will identify each household member uniquely**. What you enter here will be used in later questions to indicate which person is referred to so don’t, for example, enter two Johns if father and son have the same name.

Age What was your/ ...’s age last birthday
ENTER 0 FOR A CHILD UNDER 12 MONTHS.
ENTER 97 FOR SOMEONE AGED 98 OR OLDER.

If a respondent refuses to give their age, or cannot, then give your best estimate.

FormInf1	Do you/does household member name/have a formal arrangement, such as a rental contract, to live here, or are (you/they) living here informally? 1. Formal 2. Informal
-----------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------

FormInf2	Is this your/household member name/permanent home, or (do you/does NAME) live here temporarily? 1. Permanent home 2. Live here temporarily
-----------------	--------------------------------------------------------------------------------------------------------------------------------------------------

The Office of the Deputy Prime Minister are interested in identifying people who are living in accommodation based on informal, temporary arrangements, an example of which could be a friend living with a family whilst waiting for the completion of the purchase of their own accommodation. The friend, at the time of interview, would regard the family's accommodation as their main residence because they are not living anywhere else and they would be included as a household member because they share living accommodation with the family. Alternatively, a whole household could be living at their accommodation temporarily on an informal arrangement.

For each household member the above questions will be asked. Some people will consider themselves as living there temporarily as they are soon to move elsewhere. Many such people will still have a formal arrangement to live there such as a rental contract.

MarStat	ASK OR RECORD. INTERVIEWER: IF SPOUSE HAS BEEN LIVING ABROAD CONTINUOUSLY FOR MORE THAN SIX MONTHS, DO NOT INCLUDE THEM IN THE LIST OF HOUSHOLD MEMBERS. CODE FIRST THAT APPLIES Are you/is (name) single, that is, never married ...married and living with your husband/wife ... married and separated from your husband/wife ... divorced ... or widowed?"
----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

The aim is to obtain the legal marital status, irrespective of any *de facto* arrangement. The only qualification to this aim is that you should not probe the answer 'separated'. Should a respondent query the term, explain that it covers any person whose spouse is living elsewhere because of estrangement (whether the separation is legal or not).

Further details of who should be included in a household can be found in the field instructions but a spouse who has lived away in other accommodation for more than six months should not be included.

Cohabiting

LiveWith	ASK OR RECORD May I just check, are you/is Name living with someone in the household as a couple? This would include a same sex couple. Yes No Yes - same sex couple
-----------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Only respondents who are living with their partner in this household should be coded as living together as couple. You may code 'No' without asking the question ONLY if all members of the household are too closely related for any to be living together in a de facto marital relationship.

Relationship grid

R	I would now like to ask you how the people in your household are related to each other. CODE RELATIONSHIP - is 's.....
----------	---------------------------------------------------------------------------------------------------------------------------------------

You may want to introduce this section. A possible introduction is:

"There are a lot of changes taking place in the make-up of households/families and this section is to help find out what these changes are. I'd like you to tell me the relationship of each member of the household to every other member."

The section must be asked for all households consisting of more than one person. Please **ask** in every case. You should **not make assumptions** about any relationship.

You should probe on this question, but be sensitive. It may be that someone described as a 'son' or 'brother' earlier is actually a stepson or half-brother. Where possible, we want to know the true relationship.

Children cannot be coded as cohabiting. If you come across a situation where a 15-year-old describes him - or her -self as cohabiting with another household member then you will have to code their relationship to each other as 'no relation' - you will not be allowed to use the cohabitee code. Those aged 15 or under can, however, be coded as parents.

Treat relatives of cohabiting members of the household as though the cohabiting couple were married, unless the couple are a same sex couple. That is the mother of an opposite sex partner is coded as mother-in-law. For same sex cohabiting couples the mother of a partner should be coded as 'No relation'.

Step-grand-parents and step-grand-children should be coded as grand-parents and grand-children. 'Other relatives' (code 17) include cousins, nieces, nephews, aunts and uncles.

Half brothers/sisters should be coded with step-brothers/sisters.

Family units

NoUnits NUMBER OF FAMILY UNITS. THE HOUSEHOLD RELATIONSHIPS INFORMATION HAS BEEN USED TO DIVIDE THE HOUSEHOLD INTO *Number* FAMILY UNITS AS SHOWN.

PLEASE CHECK THE DISPLAY. IF THE INFORMATION IS CORRECT, ENTER NUMBER OF FAMILY UNITS SHOWN.

IF IT IS INCORRECT, ENTER THE CORRECT NUMBER. YOU WILL THEN NEED TO AMEND THE RELATIONSHIP GRID, OR THE MARITAL STATUS DATA IN THE HOUSEHOLD BOX.

ENTER NUMBER OF FAMILY UNITS.

The number of family units in a household is automatically calculated by the computer. Question **NoUnits** displays which family unit each member of the household belongs to. You should check that household members have been assigned correctly. For your information, a family unit is defined as:

1. a person living in the household on their own
2. a married/cohabiting couple on their own,
3. a married/cohabiting couple and their never-married children, provided that those children have no children of their own,
4. a lone parent and their never-married children, provided that those children have no children of their own,
5. any individual who cannot be assigned to any of the above categories.

If there are any errors, you should go back and check your keying in the household and relationship grids. In general, families cannot span more than two generations, that is, grandparents and grandchildren do not belong to the same family unit. There is an exception to this rule when a grandparent is acting in loco parentis and the child's parents are not in the household. In such instances, provided the grandchildren have no children of their own and have never married, then they and their grandparent(s) will be treated as one family unit. The same applies to great grandparent/child households. The age of the child is irrelevant, they can be 5 or 55.

Whilst children cannot be coded as cohabiting, they can be coded as parents. In situations where two parents are present but they are not coded as cohabiting or married (as will be the case with those aged 15 or less) then any children they may have will be coded to the same family unit as the mother. The father will form his own family unit. The age of the parents is irrelevant : off-spring will always be coded to the mother if she is present.

Adopted and step-children belong to the same family unit as their adoptive/step-parents. Foster children should be given separate family units from their foster parents.

Siblings (natural, step or adopted) do not belong to the same family unit as each other, unless they have a parent or accepted guardian in the household. Siblings who are fostered together in the same household will be allocated to family units separate from each other as well as separate from their foster parents.

Same sex couples are coded in the same family unit.

Thus, a household which included the HRP and his wife, their lone-parent daughter and her child and the HRP's mother would consist of three family units, the HRP and wife in one, their daughter and her child in another and the HRP's mother in the third.

Ethnic group

Ethnic01	SHOW CARD From this card, which of these groups do you/does... belong to?
	WHITE
	1. British
	2. Irish,
	3. Any other white background
	MIXED RACE
	4. White and Black Caribbean
	5. White and Black African
	6. White and Asian
	7. Any other mixed background
	ASIAN
	8. Indian
	9. Pakistani
	10. Bangladeshi
	11. Any other Asian background
	BLACK
	12. Caribbean
	13. African
	14. Any other Black background
	CHINESE
	15. Chinese
	OTHER
	16. Any other ethnic group

We need to know what ethnic group the **respondent** thinks he or she is in (or, if you are taking proxy information, what group the **respondent** thinks another household member is in). Never attempt any judgement of your own.

Householder

HHldr	In whose name is the accommodation owned or rented? Anyone else? CODE ALL THAT APPLY.
	Name (person 1)
	Name (person 2) etc....

You **must** code **at least one** adult as being the householder. If the accommodation is rent free, enter the person in the household who is responsible for the property.

Household Reference Person

Since April 2001, the only definition used for government surveys and many other surveys has been the 'Household Reference Person'. The 'Head of Household', was criticised for being outdated and sexist, and is no longer asked. All references to Head of Household (HoH) have been changed to Household Reference Person (HRP).

If there is just one householder (coded at **HHldr**) they will automatically be the HRP without needing to ask further questions about income. Where there are two or more Householders, the following question is asked.

HiHNum You have told me that (*names of householders*) jointly own or rent the accommodation. Which of you/who has the highest income (from earnings, benefits, pensions and any other sources)?
INTERVIEWER: THESE ARE THE JOINT HOUSEHOLDERS:
Name (person 1)
Name (person 2) etc.

ENTER PERSON NUMBER - IF TWO OR MORE HAVE SAME INCOME, ENTER 11. IF RESPONDENT ASKS FOR PERIOD TO AVERAGE OVER - ONE YEAR. PROMPT AS NECESSARY FOR JOINT HOUSEHOLDERS: IS ONE OF THEM THE SOLE PERSON WITH PAID WORK OR OCCUPATIONAL PENSION?

Remember: There is no requirement to find out *how much* income people have; just who has the *highest*. (If two or more people have the same income - or if the answer is 'don't know' or 'refuse', then the eldest householder is subsequently chosen.)

If you code one person at HiHNum, there are no more questions. If two or more householders have the *same income* you enter code 11, in which case you then need to enter the *eldest* at the next screen. (By this stage you will have already recorded ages, in the household grid. If two or more people are the same age in years, you'll need to *ask* who is the eldest.)

JntEldA ENTER PERSON NUMBER OF THE ELDEST JOINT HOUSEHOLDER FROM THOSE WITH THE SAME HIGHEST INCOME.
ASK OR RECORD.

If you had entered 'Don't know' or 'Refuse' to the first question about who has the highest income, this screen appears:

JntEldB ENTER PERSON NUMBER OF THE ELDEST JOINT HOUSEHOLDER.
ASK OR RECORD.

The SEH, in 2005/6, is asking HRP's only if they are of Gypsy or Traveller origin. The interviewer note is there to clarify that backpackers or tourists should be included in 'None of these'.

EthGyp The Office of the Deputy Prime Minister are interested in estimating the number of settled Gypsies and Travellers. Do you consider your/household member name's background to be...READ OUT...
INTERVIEWER: TRAVELLER DOES NOT INCLUDE
BACKPACKERS/TOURISTS. NEW AGE TRAVELLER SHOULD BE
INCLUDED IN OTHER TRAVELLER.
...Gypsy Roma
Traveller of Irish Extraction
Other Traveller
Or none of these?

In 2005/6, questions have been added that ask the HRP's national identity and nationality.

NatIden SHOWCARD
What do you consider your/HRP's national identity to be?
1. English
2. Scottish
3. Welsh
4. Irish
5. British
6. Other

National And what is your/HRP's nationality?
1. UK/ British
2. Irish Republic
3. Hong Kong
4. China
5. Other

Once again, as with question **Ethnic01**, do not prompt nor attempt to make any judgements of your own.

Survey respondent

SEHResp ENTER THE PERSON NUMBER OF RESPONDENT
ENTER CODE 11 IF NON HOUSEHOLD MEMBER.

This is used to filter questions. For example, the attitude questions are only asked if you are interviewing the HRP or partner. It is also used in text fills at some questions so that they are worded appropriately. **You should always endeavour to interview the HRP or partner** but

if they are not available, you may conduct the interview with another appropriate adult. If a proxy interview is going to be carried out with a non-household member, code '11.'

Remember that if you do conduct a proxy interview, then none of the opinion questions will be asked.

Type of accommodation

Accom	IS THE HOUSEHOLD'S ACCOMMODATION: 1. a house or bungalow 2. a flat or maisonette 3. a room/rooms 4. or something else?
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If the household occupies a flat in a converted house, code 2.

At multi-occupied addresses, note that this question refers to the **household's accommodation** and not to the address as a whole, nor to the Dwelling Unit if this is occupied by more than one household.

HseTyp	IS THE HOUSE/BUNGALOW 1. detached 2. semi-detached 3. or terraced/end of terrace?
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A semi-detached house is one of a **pair** which are joined together. A house at the end of a terrace must be coded 3 even if there are only three houses in the terrace.

Houses which are joined only by a garage (link-detached) should be coded detached.

Ifgard	Do you have ... CODE FIRST THAT APPLIES. INTERVIEWER: INCLUDE COMMUNAL OR SHARED GARDENS IF THE HOUSEHOLD USES/WOULD WANT TO USE THEM. EXCLUDE ALLOMENTS. 1. a garden? 2. a patio or yard? 3. a roof terrace or large balcony? 4. NONE OF THESE
---------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Accept the informant's opinion as to whether they have a garden, patio, etc. Only use code 3 for large balconies. Include communal or shared gardens if the informant feels that he or she would want to use them. Exclude allotments.

Second Homes

These questions are asked to obtain information about residential property elsewhere including property rented out to others and also second homes used by the household.

Do not include caravans or mobile homes as second homes.

Tenure

Ten1	In which of these ways do you (<i>HRP/partner</i>) occupy this accommodation? CODE FIRST THAT APPLIES
	1. Own outright
	2. Buying it with the help of a mortgage or loan
	3. Pay part rent and part mortgage (shared ownership)
	4. Rent it
	5. Live here rent-free (including rent-free in relative's/friend's property; excluding squatting)
	6. Squatting

This question is asking for the formal legal tenure of the HRP's household. If, for example, the HRP is a widow living in a house bought by her son (in his name) but he is living elsewhere, she should be coded as living rent-free even though she may regard herself as an owner-occupier. Similarly, a household which is paying a contribution to upkeep but not a formal rent should be coded as rent-free. This could arise, for example, if a parent lived in a granny-flat as a separate household but paid a contribution to general expenses.

Note that the question refers to the HRP and partner (if there is a resident partner) and you should code the first answer which applies to the couple. For example, if the HRP is buying the accommodation with the help of a mortgage and her partner lives there rent-free then this question would be coded as '2' rather than '5'.

Owners

Only code people as mortgagors if they actually have a mortgage for buying their home. Some people who have paid off their mortgage make an arrangement with the lender to continue to pay a small amount of 'mortgage' as payment for the lender for keeping the deeds. They should be coded as outright owners.

People who own their home with a lease are counted as owners. It does not matter that they pay ground rent.

Shared owners

Shared ownership means paying partly for a mortgage and partly rent so that if the person moves, he/she will get some of the proceeds from the sale of the property, according to how much of the original cost has been paid off. Include people who have paid off the mortgage portion. People with shared ownership arrangements are treated as owner-occupiers in the interview: they are **not** local authority/housing association tenants even if their arrangement is with a local authority/housing association. Owners who pay a service charge should be counted as owners, not shared owners.

Rent-free

Since people who live rent-free do not always regard themselves as doing so, particular care is needed in dealing with such cases. E.g. people on full benefit who do not pay any rent to the landlord themselves because it is paid directly by the DSS in the form of housing benefit should not be coded as living rent-free.

The following types of case have caused problems. The correct coding is in brackets:

- Someone living in a 'granny-flat' owned by her son in his name (*private renter living rent-free*).
- Someone living in the property of a deceased partner which is held in trust (*private renter living rent-free*).
- A divorced/separated woman living in the house owned solely by her ex-partner who no longer lives there (*rent-free if owned only in partner's name; owner if the house is owned in the name of both partners*)

Tied accommodation

People in tied accommodation should be coded here as renters (code 4) or rent-free (code 5), depending on whether or not they pay any rent. This group includes people whose accommodation goes with their job e.g. Church of England employees, caretakers, army personnel, council tenants whose accommodation goes with their job, some farmers. People in tied accommodation are classified as private renters, irrespective of who they are renting from.

Unusual schemes/arrangements

Co-ownership: this is the joint ownership of residential properties (e.g. blocks of flats) by a group of people who have formed a registered co-ownership society. These schemes started in the 1970s but new legislation was passed in the 1980s so that there should not be any more.

Housing co-operatives: code as renting from a housing association (code 4 here, and code 2 at **Llord** below)

Housing Action Trusts (HATs): are organisations which carry out the renovation of former council housing. Six HATs were set up under the provisions of the Housing Act 1988 to regenerate some of the most deprived local authority estates in England. The properties rented are still owned by local authorities; their tenants are renting from a local authority. The first HAT, in North Hull, completed its work and ceased operation in March 1999. The remaining five HATs are in Liverpool, Castle Vale (Birmingham), and the London boroughs of Waltham Forest, Tower Hamlets and Brent (Stonebridge HAT).

Rents to Mortgages scheme: these are schemes available to council tenants whereby a tenant has the right to buy a share of their home for roughly the same price as the rent. These should be coded as shared owners here and 'local authority' at **Llord**, below.

Private Sector Leasing: the Council leases private property for several years and lets it out to tenants. At **Llord**, such cases should be coded in terms of the immediate landlord which, which is the local authority.

Home Income Plans and Retirement Home Plans: these are where outright owners raise a loan on the security of the house for a regular income. They should be coded as outright owners.

Schemes for Mortgage defaulters: in these cases the property reverts to the lender and a rent is paid instead of a mortgage. Code as renters.

Tied Does the accommodation go with the job of anyone in the household?

1. Yes
2. No

If, by chance, the accommodation goes with the job of someone who is temporarily not a member of the household, still use code 1. This could happen, for example, if it goes with the job of a policeman who has been injured and is having a prolonged stay in hospital.

If the accommodation used to go with the job of someone in the household, but this is no longer the case, use code 2.

Llord Who is your landlord:

INTERVIEWER: IF PROPERTY IS LET THROUGH AN AGENT, THE QUESTION REFERS TO THE OWNER NOT THE AGENT.

CODE 1 (LOCAL AUTHORITY) INCLUDES PEOPLE RENTING FROM HOUSING ACTION TRUSTS, AND ALSO FROM ARMS LENGTH MANAGEMENT ORGANISATIONS.

CODE 2 (HOUSING ASSOCIATION) INCLUDES ALL REGISTERED SOCIAL LANDLORDS INCLUDING LOCAL HOUSING COMPANIES AND HOUSING TRANSFERRED UNDER LARGE-SCALE VOLUNTARY TRANSFER.

USE CODE 5 ONLY IF THE RESPONDENT AND LANDLORD WERE FRIENDS BEFORE THEY WERE TENANT AND LANDLORD, NOT IF THEY HAVE ONLY BECOME FRIENDLY SINCE THEN.

USE CODE 7 RATHER THAN DON'T KNOW.

CODE FIRST THAT APPLIES.

Organisations

1. the local authority/ council/New Town development/Scottish Homes
2. a housing association, co-operative or charitable trust, or Local Housing Company,
3. employer (organisation) of a household member
4. another organisation

Individuals

5. relative/friend (before you lived here) of household member
6. employer (individual) of household member
7. another individual private landlord?

If property is let through an agent, the questions refer to the owner not the agent.

If the respondent does not know who the landlord is, use code 7 (other private individual) rather than coding 'Don't know'.

Code 1 (local authority) includes people renting from Housing Action Trusts. It also includes private property which has been leased to local councils and let out by them.

Code 2 (housing association) includes Registered Social Landlords and Housing Companies. Local Housing Companies are non-profit making landlords who agree to rent properties out to people who may not be able to pay the market rate for rent. It also includes housing transferred from the council to the housing association under a large-scale voluntary transfer.

Use code 5 only if the respondent and landlord were friends **before** they were tenant and landlord, not if they have only become friendly since then.

Use code 7 rather than don't know.

See also notes for **Ten1** (page 15)

Furn

Is the accommodation provided ...
RUNNING PROMPT

1. furnished
2. partly furnished (e.g. carpets and curtains only)
3. or unfurnished?

The category "partly furnished" no longer has any legal significance: any letting which is not explicitly "furnished" will be classified legally as "unfurnished". We retain "partly furnished" here to ensure that respondents do not mistakenly include lettings with, say, curtains but nothing else provided as "furnished". However, do not use "partly furnished" simply because the respondent thinks that the furniture is inadequate.

Satisfaction with the landlord (social renters)

TransSat1

[*] Compared with the housing service you received from the Council before the transfer, would you say that the service you receive now, from the housing association, is better, worse or about the same?

1. service from Housing Association is better
2. service from Housing Association is worse
3. both about the same

TransSat2	<p>[*] Since the housing association has been your landlord, would you say the service they provide has improved, remained about the same or got worse?</p> <ol style="list-style-type: none"> 1. service has improved since transfer 2. service has remained about the same 3. service has got worse
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The term “housing services” referred to in these questions includes things like collecting rents, enforcing tenancy conditions, managing repairs, caretaking, cleaning, security, lettings and dealing with empty properties.

HA tenants whose tenancy was transferred from a local authority in or after 1988 are asked for their views on the current level of service provided by their current landlord (the Housing Association) compared with that under the local authority. Note the different information required at the two questions above: **TransSat1** is asking in terms of whether the service from the housing association is better than the service from the council whilst **TransSat2** aims to find out if the service from the housing association has got better since the transfer. If TransSat2 is coded 1 (service has improved since transfer) or 3 (service has got worse), you will be routed to another question asking ‘In what way?’

As these are opinion questions, the section will only be asked if you are interviewing the HRP or their spouse/partner in person.

Leaseholders

Lease	<p>May I just check, do you (...) own the house/flat freehold or on a lease?</p> <ol style="list-style-type: none"> 1. Freehold 2. Leasehold
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It is not usual for houses to be leasehold but it may happen. If a respondent says that their house is leasehold then you should check that this is really the case. Leasehold houses are most common in the North West.

In England it is unusual for flats/maisonettes to be owned freehold. Legislation was passed in early 1993 to make it easier for leaseholders to acquire freeholds. Under existing circumstances they often find it difficult to sell their property when the lease is near the end of its term because mortgage lenders will not consider such properties for loans. But even without new legislation, a leaseholder may acquire the freehold on the property which contains the flat he/she leases, either as an individual (if it is in a small building such as a converted house) or jointly with other leaseholders (if it is in a large purpose-built block). When this happens, the leaseholder technically still owns the flat on a long lease but will usually have negotiated a much longer lease, say, for 999 years. It is possible, however, that someone who has acquired the freehold on the whole building may consider that he/she owns his/her flat freehold. In such cases, accept the respondent’s answer.

ChLease You mentioned that you own the flat/maisonette freehold. Can I just check, do you own the freehold of...

1. the whole building jointly with other leaseholders,
2. the whole building yourself,
3. or just your flat/maisonette?

Since it is very unusual for people to own the freehold of their flat, this question has been added to check whether the informant really does own the freehold of the flat/maisonette.

LngthLF How long was the full lease on this property, including any extensions made to the lease?

INTERVIEWER: A LEASE OF 21 YEARS AND ONE DAY (OR LONGER) HAS LEGAL IMPLICATIONS

1. 21 years or less
2. 21 years and one day - 30 years
3. 31 - 40 years
4. 41 - 50 years
5. 51 - 60 years
6. 61 - 70 years
7. 71 - 80 years
8. 81 - 98 years
9. 99 years or longer

LngthL When you first bought the house/flat, how long did the lease have to run?

1. Less than 21 years
2. 21 - 30 years
3. 31 - 40 years
4. 41 - 50 years
5. 51 - 60 years
6. 61 - 70 years
7. 71 - 80 years
8. 81 - 98 years
9. 99 years or longer

LngthN And how long does the lease have to run now?
(codes as **LngthL**)

These are three distinct questions to collect information on the lengths of leases. Please take note of their differences:

The first asks about the full lease (including extensions) i.e. the maximum length the lease has been.

The second, asks about the length of the lease when the respondent moved in.

And the third lease asks about the length of the lease at the time of the interview.

A lease longer than 21 years is defined as a long lease in law and has certain additional rights, which is why category 2 is defined as '21 years and 1 day – 30 years'. If necessary, you should confirm with the respondent whether or not their lease is over 21 years.

Leaseholders of flats

The remaining leaseholder questions apply to leaseholders of flats and flat owners who own a share of the building freehold. They do not apply to people living in property which used to be rented from a council or Housing Association as these people have a special module later in the interview. The main interest is in examining informants' views about the services provided and maintenance, as they have little or no control over the standard and the cost. The other main objective is to assess leaseholders' interest in buying the freehold.

MainMaj	Has there been any major maintenance work in the last three years? This can include re-painting of the outside of the building.
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Major maintenance work includes substantial repairs, for example, to the roof or the building structure.

Subletting

Sublet	Does anyone in your household pay rent to ... (HRP/partner)? INTERVIEWER: USE CODE '1' ONLY IF A FORMAL REGULAR RENT IS CHARGED - THIS APPLIES EVEN IF THE TENANT DOES NOT ACTUALLY PAY REGULARLY AS LONG AS (S)HE IS SUPPOSED TO. <ol style="list-style-type: none">1. Yes, pays rent2. No-one pays rent/someone contributes to expenses but no-one pays formal rent
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This question is only asked of households comprising more than one Family Unit and so where there could be a person or group of people who might be sub tenants.

Use code 1 only if a formal regular rent is charged. This will apply even if the tenant does not actually **pay** regularly as long as he/she is supposed to.

If you use code '1' only (i.e. the only people coded as paying rent to the HRP are their close relatives) then you will not be routed to the private renters section. Claims for Housing Benefit are not allowed if such relatives claim to be renting from one another. 'Other

relatives' and 'non-relatives' are counted as sub-tenants in this sense and these will be routed to the private renters section.

In privately renting households consisting of unrelated adults sharing a house or flat, it is not always easy to work out whether or not the HRP sublets to any of the others. They may all have separate agreements with the overall landlord, which is simple, but there may be just one agreement with the overall landlord (made with one or two of the sharers but not all of them). In this case, if one or more of the sharers is formally charged a regular rent by one of the others, this should be counted as subletting. Most tenants are required to get their landlord's permission to sublet, though they may not always do so. If the arrangement is more haphazard, e.g. if someone is staying there for a time and making an informal contribution, it should not be counted as subletting.

ESblet Is there any part of your household's accommodation that is usually sublet but which is not sublet at the moment?

1. Yes
2. No

Code 'Yes' if, for example, the household lets out a bed-sitter to a student during term time and you carry out the interview during the vacation. The room need not necessarily be out of use by the household as long as it is normally sublet. They may, for example, be using it during the vacation for one of their own children home from college.

You should only code 'yes' if the person to whom the room is let would be included as a member of the HRP's household.

Rooms and Accommodation

Share2 Does your household have the whole of your accommodation to yourself/yourself or do you share any of it with someone outside your household (or would share if currently vacant accommodation was occupied)?

INTERVIEWER: INCLUDE COMMUNAL BATHROOMS, KITCHENS, LIVING SPACE. DO NOT INCLUDE LANDINGS/HALLWAYS.

1. Have the whole accommodation
2. Share with someone else outside household

This question acts as a filter for later questions on sharing. You should still code "share with someone else outside household" if the other dwelling unit they would share with is empty, or if they share part of the same dwelling unit with another household which is not living there at present. You will then be required to record various parts of the accommodation which are shared (e.g. bedrooms, kitchens, bathrooms).

Rooms1	I want to ask you about all the rooms you have in your household's accommodation ...
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You need to be careful when a householder rents out part of the accommodation to another household. For example, the owner of a property could live in the lower flat and another household could live in the upper flat. When talking to the HRP in the lower flat, you need to make sure that he/she only counts the accommodation occupied by his/her household and not the accommodation upstairs.

A room must have four walls or permanent partitions. A permanent partition is one which goes to the ceiling, this includes sliding or folding partitions which go across the room. An open-plan room with no permanent partition is therefore counted as one room.

Exclude

- rooms used solely for business
- do not count halls, landings and alcoves

Include

- any room which is usable all year round

Type of room:

Open-plan room

Treat as:

2 rooms if divided by sliding/folding partition, otherwise 1 room.

Any room intended to be a bedroom, even if it not used as such and doesn't have a bed in it.

Bedroom (there must be at least one).

A one room bed-sit

Bedroom.

Kitchen

Any room used for cooking in is a kitchen, except a bed-sitter.

Dining rooms with living room

Living room.

Sun lounge or conservatory used all year round

Living room.

Sharing

WhoSh

Do (would) you share this room/these rooms with:

1. the landlord only,
2. the landlord and someone else outside your household,
3. just with someone else outside your household?

If the sharing arrangements for different rooms are not the same, choose the code that fits the overall circumstances (e.g. if the tenant shares one room with the landlord and one with other tenants, code 2 'landlord and someone else outside your household.'

ShCirc In getting from one part of your accommodation to another, do you have to use any hall, landing or staircase which is open to someone outside your household?

Code 'Yes' if in order to move between any of their rooms or to get to the kitchen or bathroom, this household has to use a hall, stairway, landing or passage that is open to other households (e.g. bedsitters sharing a toilet on landing)

Passing through someone else's accommodation merely in order to get from their (i.e. this household's) accommodation to the entrance of the building (rather than to get to or from another part of their accommodation), does not count as sharing circulation space and should be coded as 'No'.

People whose accommodation is all behind their own front door (e.g. self-contained flat) but who have a communal hall are not sharing circulation space and should also be coded as 'No'.

IfSpBed Do you have a spare bedroom?
INTERVIEWER: INCLUDE ANY ROOM INTENDED TO BE A BEDROOM WHEN BUILT, BUT THAT IS NOT CURRENTLY USED FOR SLEEPING ON A PERMANENT BASIS
1. Yes
2. No

There are questions on spare bedrooms, that is, any room that was intended to be used as a bedroom but that has some other use.

Floor Levels

Floor INTERVIEWER - CODE OR ASK:
On what floor of this building is your main living accommodation?

INTERVIEWER: CODE LOWEST FLOOR WITH LIVING ACCOMMODATION

1. Basement/semi-basement
2. Ground floor/street level
3. 1st floor
4. 2nd floor
5. 3rd floor
6. 4th-9th floor
7. 10th floor or higher

If in doubt, give the lowest floor on which there is living accommodation.

FloorEnt INTERVIEWER - CODE OR ASK:
On what floor of this building is the entry (front door) to the flat?

INTERVIEWER: WE ARE INTERESTED IN THE ENTRANCE TO THE INDIVIDUAL FLAT, NOT THE MAIN ENTRANCE TO THE BUILDING / BLOCK

1. Basement/semi-basement
2. Ground floor/street level
3. 1st floor
4. 2nd floor
5. 3rd floor
6. 4th-9th floor
7. 10th floor or higher

Council tax band check

CTax Could you please tell me which council tax band this accommodation is in?
THIS MUST BE THE BAND GIVEN BY THE COUNCIL - DO NOT ACCEPT INFORMANT'S OWN ESTIMATE OF VALUE OF PROPERTY

We want the actual band given by the council. Do not accept estimates here of what the respondent thinks the property is worth.

Moves and housing history

Length of residence is asked of all households. Housing history is then collected for HRP's who have moved within the last 3 years. ODPM is interested only in HRP's previous accommodation because analyses of previous tenure are normally related to the HRP. However, questions about the spouse's previous accommodation are also asked if (s)he moved in before the HRP and has been at the present address for less than 3 years.

HLong How long have you (HRP) been living at this address?

HLong1 How long has ... (spouse/partner) been living at this address?

Questions in this block establish whether the HRP and their spouse/partner moved into the accommodation at the same or at different times. If the spouse/partner moved in before the HRP, there is a warning to prevent you from giving an answer at **HLong1** which is shorter than that at given at **HLong**.

PrevAc Thinking about the accommodation you (HRP) lived in immediately before you moved here, will you please tell me in which of the ways on this card you occupied the accommodation?

1. Owned it in own name/jointly
2. Spouse/partner owned it
3. Rented it in own name/jointly
4. Spouse/partner rented it
5. Had it rent-free in own name (or spouse's/partner's name)
6. Did not have accommodation in own name or spouse's/partner's name

Use code 1 or 3 if the HRP owned or rented the accommodation in his/her own name (even if this was jointly with someone else such as a previous spouse). Codes 2 and 4 may refer to either the present spouse/partner or a previous one. This is the only question where this is the case. If the HRP was living at home with his/her parents, use code 6. Use code 5 **only** if the accommodation was rent-free **in his/her own name** (or the spouse's name), for example, if he/she had rent-free accommodation which went with a job.

PrevAcN Thinking about the place you (HRP) lived in before the temporary accommodation, in which of the ways on this card did you (HRP) occupy the accommodation?
(codes as at PrevAc)

We are interested in the HRP's last *permanent* accommodation. If he/she was staying somewhere temporarily before moving into the present accommodation ask the questions about the last permanent accommodation. Explain to the informant which place you are asking about.

HRPExAdd The Department are interested in the way people move from one type of area to another, so they can plan future housing needs.
Can you tell me the address of the place (HRP) lived in before moving here?
INTERVIEWER: THERE ARE FOUR LINES FOR THE ADDRESS AND A FIFTH FOR THE POSTCODE.
PLEASE ENTER THE FIRST LINE OF THE ADDRESS HERE.
PLEASE CHECK SPELLING OF ADDRESS DETAILS.

ODPM are interested in the way people move from one type of area to another, so they can plan future housing needs. We therefore ask HRPs who have moved from within Great Britain for the details of their previous address. There are four lines for the address (at least two of which should be filled) and a separate field for the postcode. Please separate out

different components of the address, so that for example, the street number and name are recorded on one line and the town on another

If the postcode and/or a full address has not been given, you will be routed to **GorMov**, to ask which county the previous address was in.

Asking people for the details of their private address has been piloted: the vast majority of people were willing (though not necessarily able) to provide the address and postcode of their previous address.

Equivalent questions (**SpExAdd-SGorMov**) are asked about the spouse's previous accommodation if (s)he moved in before the HRP and (s)he has been at the present address for less than 3 years.

WhyM	Here are some reasons why people move. Can you tell me why you (HRP) moved last time? CODE ALL THAT APPLY
	<ol style="list-style-type: none">1. To moved to a better neighbourhood/more pleasant area2. Job related reasons3. Wanted larger house/flat or one which was better in some other way4. Wanted smaller or cheaper house/flat5. Could not afford mortgage payments/rent on previous house/flat6. Divorce/separation7. Marriage/began living together8. Other family/personal reasons9. Wanted to buy10. Wanted own home/to live independently11. Landlord required tenant to move out/had to leave tied accommodation12. So my children can get into a better school13. Other reason

Code 2 applies whether it was the HRP's job or someone else's. Similarly, use code 11 if (s)he had to move from accommodation which went with a job, even if this was someone else's job.

Attitudes to the area

These questions can help with selling the survey so be sure to mention them when you do your introduction. For example, most people have an opinion about dogs, litter or vandalism. Other 'popular' attitude topics in this year's survey include crime, noise and traffic. Respondents will also be asked how easy it is for them to get to local amenities (such as a corner shop, post office etc). There are also questions about social contact.

Leave the definition of 'the area' up to the informant. Remember that the questions will only apply if you are interviewing the HRP or their partner.

Owner occupiers

Source of mortgage

Source (Apart from the mortgage) how did you (*HRP/partner*) finance the purchase of the accommodation?
CODE ALL THAT APPLY

1. Savings
2. Proceeds from sale of previous home
3. Money paid by local authority/housing association to encourage move from council/housing association accommodation
4. Money paid by private landlord to encourage move
5. Gift or loan from family or friend
6. Loan to cover deposit/bridging loan from elsewhere e.g. bank, employer
7. Inherited money
8. Windfall
9. Other (CODE ABOVE IF POSSIBLE)
10. No other source - 100% mortgage

“Windfall” (code 8) could apply to some of the other items on the list but use this code for other unexpected or unusual sources of finance, e.g. an insurance payment or accident compensation.

Lender & Type of mortgage

PurcLoan Can I just check, do you/name of HRP have one mortgage or loan to purchase this accommodation, or more than one?

INTERVIEWER: WE ARE INTERESTED IN THE PRESENT MORTGAGE.
EXCLUDE ANY SEPARATE LOANS TAKEN OUT FOR HOME IMPROVEMENT THAT ARE NOT PART OF YOUR MAIN MORTGAGE/LOAN.

1. One
2. Two (or more) loans for purchase

We would like to know whether mortgagors have one or two or more mortgages or loans for the purchase of their accommodation. If the mortgagor does have more than one loan then they are asked the standard mortgage type question (‘MorgTyp’) for that second loan later in the module. Note that any separate loans taken out for home improvement that are not part of the main mortgage/loan are excluded.

Apart from the standard mortgage type question every other question in the mortgage module is asking about the main mortgage used for the purchase of the accommodation. There is an introductory sentence to remind respondents of this.

- Lend4N** Who did you get the present mortgage from:
READ OUT
1. a bank which used to be a building society (e.g. Abbey National, Alliance & Leicester, Bristol & West, Cheltenham & Gloucester, Halifax, Northern Rock, Woolwich) ?
 2. a building society?
 3. another bank?
 4. a local authority?
 5. an insurance company?
 6. someone else?

If the mortgage was taken out with a building society which has subsequently converted to a bank, use code '1.' This includes the following building societies and other lenders which recently became public limited companies: Abbey National, Alliance and Leicester, Bristol and West, Cheltenham and Gloucester, Halifax, Northern Rock, Woolwich.

During the period of conversion, code to the status of the lender on the date of interview, i.e. only code as a bank when stock market floatation has occurred.

- MorgTyp** Is this mortgage/loan ...RUNNING PROMPT
INTERVIEWER: IF NECESSARY ADD 'With a repayment mortgage, by repaying the original loan we mean the original capital sum borrowed'
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 mortgage, ISA mortgage or Unit Trust mortgage
 5. or 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, PEP or ISA)
 8. or another type (not listed above)

This is the only question where the codes appear on a show card AND you should read them out (as a running prompt). You do not have to read out the text in brackets: it is optional and need only be used where you think necessary.

Endowment Mortgage

An endowment policy is taken out with an insurance company either before or at the same time as the mortgage, and it is arranged that when the policy matures it will pay off the original sum borrowed under the mortgage, i.e. the amount of money received from the matured endowment insurance is paid to the lender (e.g. the building society). The original mortgage amount remains outstanding until the policy matures. In the meantime interest is paid on the total amount borrowed and premiums are paid on the endowment policy.

Repayment Mortgage

In this case the money borrowed for the purchase of the house is repaid over a period of years; interest is also paid on the amount outstanding at the time. Usually the payments in any one year consist partly of repayments of the original loan (also referred to as the capital/principal) and partly of interest. As time goes on the interest part becomes smaller.

People with repayment mortgages (and pension, PEP, ISA or Unit Trust mortgages - see below) usually take out a mortgage protection policy with an insurance company so that in the event of death there is available a sum of money to pay off the outstanding mortgage. This arrangement should not be confused with the endowment policy of an endowment mortgage.

Pension Mortgage

A pension mortgage is similar to an endowment mortgage but is available only to the self-employed and those who are not in a company pension scheme. Interest only is paid to the lender and monthly contributions are paid to a pension plan which is designed to repay the mortgage on retirement. In addition, it is necessary to arrange a separate protection policy designed to repay the mortgage if the borrower should die before the end of the mortgage term.

PEP, ISA and Unit Trust Mortgages

With a PEP or ISA mortgage, the borrower pays interest only to the lender and pays monthly contributions into a Personal Equity Plan or Individual Savings Account, which is designed to pay off the loan. The PEP or ISA will usually invest in unit trusts and a mortgage protection policy must be arranged.

With a Unit Trust mortgage the borrower pays interest only to the lender and also makes monthly investments in a unit trust savings plan. As stock market prices rise, the lender may allow the borrower to pay off part of the loan. With this arrangement, a protection policy is also necessary.

Both an interest only and repayment mortgage

This code applies if the mortgage is a single arrangement which has both an interest-only element and an interest-and-capital element, combined into one regular payment made to the lender. The questions will be routed as for endowment mortgages.

If there are two separate mortgages of different types secured on the property, and separate payments are made to the lender(s), only the main mortgage should be coded at this question. Separate, second mortgages not for the purchase of the property or any separate mortgage for purchase should not be entered here.

An interest only mortgage with more than one linked investment

Respondents now may have taken out more than one investment to cover the mortgage, due to worries about endowments under performing.

An interest only mortgage with NO linked investments

This refers to actually selling the property to cover the cost of the initial loan

Mortgage payments

MorgPayU	How much is your usual payment on this mortgage or loan- please INCLUDE any payments for endowment policies but EXCLUDE any other items. ENTER AMOUNT TO THE NEAREST £1.
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If possible, include payments on endowment policies but accept the amount if the informant is unable to include the endowment payment.

Payments by people outside the household should be included.

Examples of items that should NOT be included in the payment are mortgage protection policies, insurance on structure or contents. However, you should accept amounts that include such payments if the informant cannot separate the charges.

Shared ownership schemes - enter the combined rental and mortgage payments.

Two concurrent mortgages - enter the combined last payment.

Do remember that MIRAS (**M**ortgage **I**nterest **R**elief **A**t **S**ource) was abolished in April 2000.

Mortgage protection policies

MPolDth	Do you have a specific life insurance policy which would pay off your mortgage in case of death? 1. Yes 2. No 3. Don't Know
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Please ensure that you do not include endowment policies etc. at this question: these are covered elsewhere.

MPolCrit	Do you have an insurance policy which would pay off all (or some) of your mortgage in case of critical illness. This would pay off your whole mortgage or an agreed amount if diagnosed with a potentially life threatening illness (such as cancer or alzheimer's)?
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	<ol style="list-style-type: none"> 1. Yes 2. No 3. Don't Know
MPolSkUn	<p>Do you have an insurance policy intended specifically to pay your regular mortgage payments in the event of accident, sickness or unemployment /redundancy?</p> <ol style="list-style-type: none"> 1. Yes 2. No 3. Don't Know
MPolCov	<p>Does it cover...RUNNING PROMPT... INTERVIEWER: INCLUDE POLICIES WHICH PAY OUT IN THE EVENT OF ACCIDENT, SICKNESS, REDUNDANCY. DO NOT INCLUDE LIFE ASSURANCE/ENDOWMENT POLICIES LINKED TO THE MORTGAGE NOR MORTGAGE INDEMNITY POLICIES.</p> <ol style="list-style-type: none"> 1. Unemployment only 2. Accident or sickness only 3. or both unemployment and accident or sickness?

Remortgages

IncrMorg	Have you increased the amount borrowed on your property since the initial loan?
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IncrHow	<p>SHOWCARD How did you increase the initial loan? CODE ALL THAT APPLY</p> <ol style="list-style-type: none"> 1. remortgaging and borrowing a larger amount, 2. taking out a further advance in addition to your existing mortgage 3. using the automatic right to increase the mortgage up to an agreed sum
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Remortgaging includes ending one loan and taking out a larger one with the same or a different lender. Taking out a further advance includes second mortgages. The additional loan could be taken out for any reason, not necessarily house purchase.

Ownership of previous accommodation

OwnPr You may have told me this already, but may I just check, have you (HRP) owned any other accommodation before this house/flat?
INCLUDE JOINT OWNERSHIP.

OwnPrN Have you (HRP) ever owned any previous accommodation?
CODE FIRST THAT APPLIES

1. by yourself?
2. jointly with someone else (other than present partner)?
3. jointly with present partner?

These questions refers to any previous properties owned by the HRP.

The answer categories at **OwnPrN** are in priority order so, for example, if the HRP has owned one home on their own and another with someone else, then code 1 (by yourself) takes priority; if they have only owned jointly with someone other than their present partner, select code 2 and so on.

Social Rented Sector Tenants

Succession tenancies

These questions apply to council and housing association tenants. ODPM want to know the numbers of tenants who have acquired their tenancy as a result of right of succession, that is, by taking over a tenancy from someone who has died or moved into residential care. The current position is that when a regulated tenant dies, the tenancy will automatically pass to his/her spouse who will retain the same protection under the Rent Act 1977. If the tenant did not have a spouse living with him/her, another member of their family can succeed to an assured tenancy under the Housing Act of 1988, provided that they were living with the tenant for at least two years prior to his/her death. The tenancy would be on an on-going indefinite basis (called a statutory periodic tenancy) and the landlord would only be able to bring the letting to an end if he could persuade a court that one of the grounds set out in the Housing Act 1988 applied.

Rent and Housing Benefit

HBen Some people qualify for Housing Benefit, that is, a rent rebate or allowance.

Do you receive Housing Benefit?

Housing Benefit, sometimes called a rent rebate or rent allowance, helps those on low income pay their rent. Before April 1990, Housing Benefit could also include a rate rebate but this has now been replaced by Council Tax Benefit.

RentAmt How much rent did you (your household) actually pay last time it was due, after any Housing Benefit (rent rebate)?
ENTER TO NEAREST £1 (AFTER HOUSING BENEFIT)

If a 100% rent rebate/Housing Benefit is received (i.e. the household does not pay any rent themselves) then the amount entered here should be '0'. Also enter '0' if rent paid direct by someone outside household.

Rent in arrears - enter the amount last paid even if this was a while ago.

Housing Benefit - Rent rebates and rent allowances

Rent rebates are for LA renters (usually by reducing rent payable).

Rent allowances are for PRIVATE renters (usually as lump sum).

Both benefits are means tested. Tenant must usually apply (to local authority).

Those on *Income Support* can get up to 100% of their eligible rent covered, and 100% rebate on amenities such as heating and lighting if these are included in the rent.

Most full-time *students* can't get Housing Benefit, but their non-student partners may.

Rebates are not the same as the *differential rent scheme*, for which income details are compulsory.

RentHol Do you have a rent holiday?

RentHolWks For how many weeks a year do you have a rent holiday?

Rent holidays are weeks, usually holiday periods, when no rent is due. To allow for this, the year's rent is divided into 48, 49 or 50 instalments instead of 52.

Attitudes towards level of rent

SRLevel [*] What do you think of the present level of rent set by *the Local Authority/Housing Association* for your accommodation?
INTERVIEWER: WE ARE INTERESTED IN THE LEVEL OF FULL RENT SET BY THE LA/HA, EVEN IF THE RESPONDENT DOESN'T PAY IT ALL (E.G. SOME PAID BY HOUSING BENEFIT)

HAS229 [*] Some people can easily afford to pay their rent, others find it difficult to pay. Thinking about your rent, *that is the amount you pay after Housing Benefit*, how easy or difficult is it for your household to afford the rent?
INTERVIEWER: THIS QUESTION IS CONCERNED WITH THE AMOUNT ACTUALLY PAID IN RENT. THIS MIGHT NOT BE THE FULL AMOUNT SET BY THE LA/HA (IF, E.G., THEY RECEIVE HOUSING BENEFIT).

These two questions deal with attitudes towards levels of rent. Please note the different information required at each question: the first deals with the full amount of rent set by the local authority or housing association and the second question deals with the amount actually paid by the household. The text in italics at **HAS229** will only appear if it has been established that the household receives Housing Benefit.

Homelessness

SRCheck2 May I just check, had you been accepted as homeless by the council before you were allocated your current home?

INTERVIEWER: AUTHORITIES MUST SECURE TEMPORARY ACCOMMODATION FOR HOUSEHOLDS WHO ARE HOMELESS THROUGH NO FAULT OF THEIR OWN AND IN A PRIORITY NEED GROUP (EG. FAMILIES WITH DEPENDENT CHILDREN). THIS DUTY ENDS WHEN THE HOUSEHOLD IS ALLOCATED PERMANENT HOUSING.

This question aims to identify if the household were owed a duty by the housing authority under the homelessness legislation when they were allocated their current home. Not everyone on a waiting list falls into this category. Tenants who have been accepted as homeless should know that they had been. There is quite a major application and checking process which will almost certainly have involved an in-depth interview. This is separate from, and should be more substantial than, putting your name down on a waiting list.

Housing services

Note that **HAS238N** is asking tenants to round up all aspects of services provided by the landlord, including any such as repairs services which have already been mentioned (in **HAS213**). The term "housing services" referred to in this and the following questions includes things like collecting rents, enforcing tenancy conditions, managing repairs, caretaking, cleaning, security, lettings and dealing with empty properties.

Employment

EconAct

Looking at this card, how would you describe (your/adult household member name) situation in the 7 days ending the (Sunday of the last week)?

INTERVIEWER: IF WAITING TO START A JOB OR GOVERNMENT TRAINING SCHEME CODE AS SEEKING WORK

CODE ALL THAT APPLY

1. Working: Full-time
2. Working: Part-time
- 3 Government training scheme
- 4 Not working because of long term sickness or disability
5. Registered unemployed
6. Not registered unemployed but seeking work
7. At home/not seeking work (including looking after the home or family)
8. Retired (including retired early)
9. Full-time Student
10. Other (SPONTANEOUS ONLY)

The question on employment is asked for each adult (i.e. everyone aged sixteen and over) in the household. Collect the information from the main informant - there is no need to speak to the other people in person. For each adult, code each of their activities, for example, someone could be working part-time and be a full-time student. Note that code 7 'At home/not seeking work' includes looking after the home or family.

For those who are working (Full-time or Part-time):

You should take the respondent's definition of whether they are in paid work or not, but it must be **paid** work.

'Paid work' at this question means ANY work for pay or profit done in the reference week. It is to be included, however little time is spent on it, so long as it is paid. For example, it includes Saturday jobs and casual work (e.g. baby-sitting, running a mail order club, etc.). Some respondents may not regard baby-sitting, etc. to be 'serious' work. Probe those to whom you feel this may apply (e.g. housewives with dependent children).

Self-employed people are considered to be working if they work in their own business, professional practice, or farm for the purpose of earning a profit even if the enterprise is failing to make a profit or is just being set up.

Training for nurses is now carried out under the Project 2000 scheme; nurses on this scheme should be classed as students, like any student nurses you may encounter with more traditional arrangements.

Someone who regards themselves as retired, but sits as a director on board meetings (however few) and is paid for this work, should be classified as in paid work. We do NOT expect interviewers to probe routinely for this.

In cases where the respondent is unsure whether they actually had a job the following points may be helpful:

For *those working*, a job exists if there is a definite arrangement between an employer and an employee for work on a regular basis (i.e. every week or every month) whether the work is full time or part time. The number of hours worked each week may vary considerably but as long as some work is done on a regular basis a job can be said to exist.

Long term absence from work: If the total absence from work (from the last day of work to the reference week) has exceeded six months then a person has a job only if full or partial pay has been received by the worker during the absence and that they expect to return to work for the same employer (i.e. a job is available for them).

Career Break: In some organisations employees are able to take a career break for a specified period and are guaranteed employment at the end of that period. If a respondent is currently on a career break they should be coded working here only if there is an arrangement, between the employer and employee, that there will be employment for them at the end of the break. This is not dependent upon them receiving payment from their employer during this time. The respondent's opinion of whether they have a job to go back to should be taken.

Seasonal workers: In some industries (e.g. agriculture, forestry, fishing, types of construction, etc.) there is a substantial difference in the level of employment from one season to the next. Between 'seasons' respondents in such industries should be coded as at home at this question. (However, note that the odd week of sick leave during the working season would be treated like any other worker's occasional absence and coded working here).

Casual workers: If a respondent works casually for an employer but has not worked for them during the reference week, they should be coded as at home, even if they expect to do further work for the employer in the future.

Occupation and Industry

The occupation and industry questions apply to the HRP only. The spouse/partner of the HRP will just be asked for their job title.

The questions are asked about the present main (i.e. most remunerative) job of those currently working and the last job of those not working. The answers at IndD, Occd and Occt will be used to help with the coding of occupation so make sure that you enter something informative.

EmpNo01	How many people worked for your employer at the place where you (HRP) worked? Were there ... (RUNNING PROMPT)
1.	1-24
2.	25-499, or
3.	500 or more employees?

SENo01 How many people did you employ at the place where you (HRP) worked? Were there ... (RUNNING PROMPT)

1. 1-24
2. 25-499, or
3. 500 or more employees?

We are interested in the size of the “local unit of the establishment” at which the respondent works. The “local unit” is considered to be the geographical location where their job is mainly carried out. Normally this will consist of a single building, part of a building, or at the largest a self-contained group of buildings.

It is the total number of employees at the respondent’s workplace that we are interested in, not just the number employed within the particular section or department in which he/she works.

If a respondent works from a central depot or office (e.g. a service engineer) base, the answer is the number of people who work at or from the central location. Note that many people who work “from home” have a base office or depot that they communicate with. It may even be true of some people who work “at home” (e.g. telecommuter who retains a desk or some minimal presence in an office). If in doubt, accept the respondent’s view of whether or not there is a wider establishment outside the home that they belong to for work purposes.

For self-employed people who are subcontracted for any significant (respondent’s definition) length of time to work in a particular place (e.g. building site), that is their place of work.

Income

Income of HRP and partner

We ask for the gross income in banded form of both the HRP and their partner. Note that you can collect the information from the respondent, you so not have to speak to both the HRP and partner in person.

If the income of either the HRP or their partner is missing then an estimate of their joint income is asked for, otherwise the total joint income is computed.

The first Income show card goes across two pages: you should ensure that the informant sees both pages and explain how to use the card, if necessary. Each row shows a weekly band with the monthly and annual equivalents.

If the informant chooses the top band (code 11), we ask for an annual amount from a further show card which shows higher income bands.

Note that **Gross/Gross2** ask about the HRP's income only and **SGross/SGross2** ask about the spouse's income only, although **SrcInc** has asked about sources of income for both the HRP and spouse/partner together.

Spinc	Does (SPOUSE) have any separate income of his/her her own? 1. Yes 2. No
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If this is coded 'No', **SGross** is set to code, the code after the last band shown on the card. In the calculations, it is treated as zero.

Household income

The household income questions are only asked if the household consists of more than two people or two people who are not married or cohabiting. Otherwise the household income is automatically computed from the HRP/joint income.

Eligibility for Housing Benefit

ODPM is interested in finding out more about people on low incomes who pay rent but who say that they do not get any Housing Benefit. Some new questions are asked of both social and private renters on low incomes to check whether they do get Housing Benefit and, if not, whether they think that they are eligible. The routing for these questions is based on the difference between income and rent and varies depending on the number of people in the household/tenancy group. For one-person households, the questions are asked if the

difference is less than £80. If there is more than one person in the household then the questions are asked if the difference is less than £180.

The question shown below is that asked of social renters. There is an equivalent question for private renters which is asked after the income section in the private renter's questionnaire (see the appropriate section later in these instructions)).

HBCheck Can I just check (from what you have told me your (the household's) gross weekly income is about £... and your (the household's) weekly rent is about £... per week). Does anyone in the household get any help with rent from Housing Benefit?

1. Gets help from Housing Benefit
2. Does not get help from Housing Benefit

If informants say at the check question that they do get Housing Benefit, then you should go back to where the original Housing Benefit questions are asked and enter the amount of Housing Benefit here (a soft check will prompt you to do this).

The Leaseholder Module

Background

This module will be asked of households who own a flat or maisonette which was previously rented from the council or housing association

ODPM is particularly interested in the number of leaseholders facing difficulties paying for service charges or those who are unable to sell their properties. Most sitting tenants are given a protection period which limits the amount that they can be charged for services for the first five years after purchase. It is anticipated that the number of leaseholders facing problems may increase as many sales completed in the early 1990's will be exceeding their protection periods around now.

Only a small number of people will qualify for the module - probably fewer than 200 per year.

You will be automatically routed to the questions if you are interviewing an HRP or partner who owns their own home (Ten=1,2,3), lives in a flat or maisonette (Accom=2) and whose home was previously rented from the Council or a Housing Association (EverCIHA=1,2).

The module will take about 15 minutes. In most cases you should be able to ask the questions at the end of the SEH interview. If this is not possible, ask the module on a recall visit. There is no need to mention this section in your normal introduction to the SEH, as it applies to only a small number of households.

Accessing the questions

The leaseholders module appears at the end of the main household questionnaire, after the income section. A question will appear (IntLeas) that will ask you to introduce the module and then code whether you wish to continue with the interview or not.

- To go into the module code 1 (Ready).
- If you cannot continue with the module after the main household interview but you intend to complete the module later, enter code 2 (Unable). When you go back to carry out the module later, you will need to re-open the same household interview. Press <CTRL+ENTER> to bring up the parallel fields. Use the down arrow key until the module - QLease - is highlighted then press enter. You will be taken straight to IntLeas where you can change the code from 2 (Unable) to 1 (Ready).
- If the respondent refuses to carry out the leaseholder module, code 3 (Refused). You should still allocate a productive outcome code.

Prompt cards

The prompt cards for this module are labelled LA to LL.

The questions

Facils	SHOW CARD Does this block/building have any of these facilities?
	1. Lift
	2. Concierge
	3. Caretaker
	4. Door entry system
	5. Communal/group heating system
	6. Communal garden
	7. None

Code 2 - A *concierge* is someone who guards an entry point.

RTBSch	You said earlier that you bought this home from a Local Authority/Housing Association. Was this under the Right to Buy Scheme or another sitting tenant scheme?
	1. Right to Buy Scheme
	2. Another sitting tenant scheme
	3. Neither

Code 1 - *The Right to Buy Scheme* was introduced in 1980 and involves the sale of Local Authority housing to sitting tenants.

Code 2 - *Other sitting tenant schemes* may include, for example, people who bought their properties under voluntary purchase schemes. These were in operation in some Local Authorities before the Right to Buy scheme was introduced (some LA's may still be running them today).

MnthBuy	Could you tell me whether you bought your home:
	1. Before April 1998
	2. During or after April 1998?

This question is used in subsequent routing - those who bought their home within the last two years are excluded from questions asking about total service charges and amounts paid for major works for the last full year (**SerChg** to **MWkAmt**), since some purchasers may not have owned their properties for a full year.

SCharg Do you pay any service charges on your property?

This question is asked to screen out those who do not pay any service charges. In some cases, people who bought their accommodation many years before the Right to Buy legislation may not pay any service charges.

SerChg Thinking of your service charge payment in the last full year, what was the total amount you were charged, including all elements such as ground rent, insurance, maintenance, services, repairs and major works.

The charges that are made will be determined by the type of property and the terms of the lease, but generally, the main elements of service charges are those specified in the question. Please include all elements in the total amount. Accept estimates if the respondent does not know the exact amount paid.

Please note, the amount paid in the last full year should be the actual amount paid by the respondent, not the amount estimated by the council/housing authority at the beginning of the year, and not the total cost to the whole block/building. (This also applies to amounts asked at **MWkAmt**).

'Last full year' refers to the last financial year - April to March.

MajWk Does this amount include any payment for major works?

Major works include, for example, work on foundations (including damp proof courses), window replacements, rewiring, external redecoration, roofing work and repairs to lifts.

Respon From this card can you tell me which one of these applies to your current responsibility for service charges?

1. Responsibility limited for the first 5 years after purchase
2. Responsibility limited to the cost of non-structural defects
3. Responsibility limited in some other way
4. Responsible for the full cost of all charges
5. None of the above

Code 1 - Housing authorities have to tell sitting tenant purchasers, at the time of purchase, the estimated cost of work which will need to be carried out on the property during the initial period of 5 years. The purchaser is liable for a proportion of the cost of any work that they were notified of, but not for any other work carried out during the period.

Code 2 - Some leases may not expect people to contribute to major refurbishments, for example.

Valued	Have you had your home valued in the last 12 months?
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This involves valuations made, for example, by an estate agent for the purpose of selling, rather than valuations on properties for council tax bands.

Dividing people into tenancy groups (TGs)

Background

This section is intended to sort out how many private renters interviews you need to do and with whom. If the household rents privately you will need to interview the HRP (or their spouse/partner) as a private renter but there may be other tenancy groups in the household.

A tenancy group (TG) is the person or group of people covered by a single tenancy agreement. In some privately renting households, different members of household may have separate agreements with the landlord and there will be a different TG for each separate agreement. There may also be subletting within the household. If one member of the household sublets to another, another TG exists.

Finally, privately renting TGs may exist within households which own their accommodation or rent it from a local authority or housing association. If such a household lets part of the accommodation to another household member, whoever is covered by the renting agreement forms a tenancy group.

No individual can be a member of two different TGs.

As mentioned earlier at **SubLet**, close relations in the same household are not counted as renting from one another in the strictest sense. So, even if a daughter and son-in-law, claimed at WhoLet to pay rent to the HRP, they would not be routed through to the private renters questions as they would not be regarded as being in a separate tenancy group. The reason for this is that claims for Housing Benefit on this basis would not be permitted.

Prompt cards

The prompt cards for this module, starting at PA1, are presented at the end of the show card pack and are printed on non-white paper, to distinguish them from the other cards used in the main interview and the leaseholder module.

Semi-automation of private renters to tenancy groups

NumAgr	Number of separate renting agreements
SortTG	Sorting household members into TGs

In certain circumstances, we have been able to automatically code **NumAgr** and **SortTG** from information collected during the course of the main interview. For instance, in a household where the HRP is a private renter and all other household members are his/her close relatives (and thereby cannot form a separate tenancy group), then **NumAgr** and **SortTG** will be computed automatically. In such circumstances, you will be routed beyond these and straight to the questions that ask you to code the relationship of each tenancy group member to the Tenancy Reference Person (TRP).

If we have not been able to glean enough information from the main interview to code these questions automatically, then you will still be routed to **NumAgr** and **SortTG**, where you should work out and enter the responses manually.

Also see below for further information about questions **NumAgr** and **SortTG**.

The questions

SmAg	Thinking about all the people in your household, I mean (<i>Names</i>) are you all covered by the same renting agreement with your landlord or does any of you have a separate agreement with the landlord? <ol style="list-style-type: none">1. All covered by the same agreement2. Some member(s) of household covered by separate agreement(s)
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This question is asking about agreements with the **overall** landlord. Use code 1 unless someone in the household, apart from the HRP, pays rent separately to the overall landlord under a separate agreement. This could occur, for example, if a group of friends sharing a flat form a single household but all have separate agreements with the landlord.

NumAgr	ENTER NUMBER OF SEPARATE TENANCY AGREEMENTS WITHIN THIS HOUSEHOLD (I.E. NUMBER OF GROUPS OF PEOPLE COVERED BY SEPARATE AGREEMENTS) - PUT ALL COUPLES IN THE SAME TENANCY GROUP - PUT CLOSE RELATIVES, I.E. PARENTS, CHILDREN, SIBLINGS (IN-LAW) IN THE SAME TENANCY GROUP UNLESS COVERED BY SEPARATE RENTING AGREEMENTS
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Enter here the total number of separate private renting agreements in the household, including agreements with an outside landlord and agreements among the household members. This is the number of private renters interviews you should carry out.

If the HRP has an agreement with the landlord and sublets to a friend, there are two agreements; if the friend then sublets to someone else, there are three. If you are having difficulty sorting out the number of agreements, check what happens when someone leaves. If the landlord has to find a replacement, the likelihood is that the tenants have separate agreements; if the tenants have to find a replacement (and if they don't, they are liable for the rent for the empty room), it is likely that there is one agreement covering all.

If the household has a shared ownership arrangement this is not a private renting agreement and the HRP should not be interviewed as a private renter. Such a household may, of course, sublet.

SortTG

CODE WHICH TENANCY GROUP EACH PRIVATE RENTER BELONGS TO.
IF THE PERSON IS NOT A PRIVATE RENTER, ENTER CODE 11.

A person can be long to only **one TG**. If the HRP rents from the overall landlord and sublets to another member of the household, say Harold, do not include Harold in the HRP's TG (even though the HRP's agreement with the overall landlord covers him).

If the HRP is an owner or social renter, the computer will automatically enter code 11 beside their name and that of anyone else in their (the HRP's) family unit. As mentioned earlier, if the HRP is a private renter, his/her TG number will be automatically computed. This is also the case for anyone else in his/her family unit or any other close relative.

Once you have allocated people to TGs you will have the option of interviewing each TG 'now' or 'later'. Each TG module is a parallel field so you can move between TGs if you need to. You do this from within the household questionnaire. Press <CTRL+ ENTER> to access the parallel fields screen. The TG(s) will be displayed and you can use the up/down arrow keys to highlight the required tenancy group. When the one you want is highlighted, press ENTER and you will be taken to the beginning of the module where you can change 'later' to 'now.'

The private renters module

Tenancy Reference Person (TRP)

The TRP is established in exactly the same way as its household-level equivalent, HRP, that is, the person responsible for the rent. If the HRP is a private renter, they will, by default, be the TRP for their TG. For other TGs (i.e. those not containing the HRP), you will need to ask further questions to establish the TRP. You will start off by asking the following:

AgrResp In whose name is the agreement with the landlord?
INTERVIEWER: IF THE RENT IS PAID FOR BY SOMEONE OUTSIDE THE TG, CODE THE PERSON IN THE TG WHO IS RESPONSIBLE FOR THE RENTAL AGREEMENT.
ANYONE ELSE? CODE ALL THAT APPLY.

Name (TG member 1)
Name (TG member 2) etc

You **must** code **at least one** adult as being the renter. If the accommodation is rent free or paid for by someone outside the TG, enter the person in the TG who is responsible for the rental agreement.

If there is just one renter they will automatically be the TRP without needing to ask further questions about income. If more than one person is responsible for the rent, then it is the person with the highest income (and if joint income, then it's the eldest).

Remember : there is no requirement to find out *how much* income people have; just who has the *highest*.

The Informant

PRInf THE TENANCY REFERENCE PERSON FOR THIS TENANCY GROUP HAS BEEN CODED AS *Name*.
THEIR SPOUSE, IF ANY, HAS BEEN CODED AS *Name*
NOW CODE THE INFORMANT FOR THIS TENANCY GROUP INTERVIEW.
IS IT...
Tenancy Reference Person (*Name*)
Spouse/partner of Tenancy Reference Person (*Name*)
Child/stepchild of Tenancy Reference Person
Other

The Private Renters module should be carried out with the TRP or their spouse/partner. It may occasionally be necessary to interview some other responsible adult member of the tenancy group instead. In some circumstances (e.g. if friends are sharing a flat but have separate agreements with the landlord or if the TRP is renting from a friend), it may be appropriate to interview someone outside the TG (but within the household) as a proxy. This should only be done as a last resort and in such circumstances, remember that the questions refer not to the informant's own accommodation/ circumstances but to those of the TG in question.

Tenancy characteristics

There is a whole section on tenancy characteristics and a number of questions are asked to find out exactly what type of letting each tenancy group has. There is interest in this because there were major changes to letting types as a result of the Housing Act 1988. You do not need to know details of the different letting types, as the computer will automatically route you to the questions necessary. However, for your information a summary of the main changes is given below:

Before January 1989 most lettings were Regulated Tenancies giving tenants full security. Other types of tenancy were Assured and Protected Shorthold lettings (which were restricted to new or substantially renovated properties), Resident Landlord Lettings; lettings with no security and lettings not accessible to the public.

All tenancies started on or after 15 January 1989 are Assured or Assured Shorthold tenancies, unless they are a Resident landlord letting, no-security letting or a letting not accessible to the public. With Assured Shorthold Tenancies, the landlord has an absolute right to possession of the accommodation at the end of the shorthold, which has a minimum term of six months. Post-1988 assured tenancies are similar to the earlier assured tenancies but do not have restrictions to the type of property or landlord, which the earlier ones had.

PLLord	INTERVIEWER CODE OR ASK May I just check, is the landlord: 1. an individual 2. or an organisation?
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LlHh	CODE OR ASK Is the landlord a member of your household?
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If the TRP is also the HRP, you will already know the answers to these questions.

In the case of sub-tenants, make it clear that, here and throughout the interview, "your landlord" means the tenant's immediate landlord and not the overall landlord. When friends are sharing but one pays rent to the other who pays rent to an overall landlord, they may well not think of each other as landlord and tenant. In these circumstances, the sub-tenant may answer the questions in relation to the overall landlord unless you make the

meaning quite clear. In situations like this, it may be best to explain at the beginning of the Private Renters interview that you will be asking a lot of questions about the landlord and the agreement the tenant has with the landlord and that this will always refer to the immediate rather than the overall landlord.

If the tenancy group is in a non privately renting household (i.e. the HRP is not a private renter), the tenant must be paying rent to the HRP (i.e. he/she is a subtenant). The landlord must therefore be in the household. Conversely, if the tenant is in a private renting household and he/she is the HRP, the landlord cannot be a household member. There is a check to this effect.

TimePr And how long altogether have you ... been renting from a private landlord (in this most recent spell)?

We want to know how long without a break the tenant has been renting from a private landlord. Use the part in brackets if tenant has had periods outside the private rented sector.

Ctract When you first started to rent this accommodation:

1. did you and the landlord sign a written agreement
2. did you have a written agreement which you didn't sign
3. or did you just have an unwritten agreement?

If more than one person is responsible for the rent and they did not move in at the same time, this question refers to the time when the *first* one moved in.

ConChk ASK INFORMANT TO GET THE CONTRACT OR AGREEMENT/NOTICE FOR REFERENCE IN THE FOLLOWING QUESTIONS AND CODE WHETHER YOU HAVE BEEN ABLE TO CHECK IT OR NOT

1. Contract/notice checked
2. Contract/notice not checked

TenType Can you tell me what type of tenancy you have? INTERVIEWER: IF TENANCY TYPE WRITTEN ON CONTRACT/NOTICE ASK RESPONDENT TO READ OUT.

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
7. Don't know
8. Refused

OthType 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?

1. Crown tenancy/licence (includes H.M. Forces)
2. Service occupancy (excludes H.M. Forces)
3. Business or agricultural tenancy
4. Asylum seeker let (issued by National Asylum Support Service NASS)
5. Holiday let
6. Other type of let
7. Don't know
8. Refused

Is this a low-season let?

INTERVIEWER: THIS REFERS TO AN OUT OF SEASON LET

1. Yes
2. No

If you are able to check the agreement, look to see if it says that the tenancy is an Assured Shorthold. Show card PA3 - which goes across two pages - gives an example.

Short

I'd like to ask you a few questions to make sure what kind of agreement it is. There is a form of tenancy called an 'assured shorthold'. For these, you had to be given a notice in writing by the landlord that told you that it was an assured shorthold tenancy. Does your agreement or notice state that it is an assured shorthold or not?

1. Yes, assured shorthold
2. No

Short97 I'd like to ask you a few questions to make sure what kind of agreement it is. There is a form of tenancy called 'assured shorthold'. Most new tenancies are of this type. There are also others, just called 'assured'. For these, you have to be given a notice in writing by the landlord that tells you that it is NOT an assured shorthold agreement. Does your agreement or notice state that it is NOT an assured shorthold?

1. Not an assured Shorthold
2. Other agreement

Short and Short97 would only be asked if the respondent did not know their tenancy type at TenType or OthType.

The routing to **Short** and **Short97** depends on when the tenancy started. Tenancies starting after February 1997 are routed to **Short97** and earlier tenancies to **Short**.

Most tenancies starting between 1989 and end February 1997 are Assured Shortholds. For such tenancies, people have to be given a notice saying that the tenancy is an Assured Shorthold. Note that there are also other tenancies described just as Assured.

Tenancies starting from March 1997 are automatically Assured Shortholds unless the rental agreement states specifically that it is NOT an Assured shorthold. If you are able to check the agreement, look to see if it says that the tenancy is NOT an Assured Shorthold.

OthWay 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?
CODE FIRST THAT APPLIES

1. Company licence
2. College licence
3. Non-exclusive occupancy agreement
4. Holiday let
5. Low season
6. None of these

WJob Does this accommodation go with your present job or *the job of anyone covered by this tenancy agreement (that is)*?

1. Goes with someone's job
2. Does not go with anyone's job
3. Used to go with job but does not now
4. Goes with job of someone not at present in household

Use code 4 if the accommodation goes with the job of someone who would normally be in the household but is temporarily not a formal household member (e.g. someone who has been in hospital for a long time).

The text in italics will only be shown if the tenancy group contains more than one person.

Rents

RFree May I just check, are you charged rent or is the accommodation rent-free?

1. Charged rent
2. Rent-free
3. Pays part of the rent, employer pays part (accommodation goes with job)

PFree You said that you have the accommodation rent-free. Does anyone outside your household pay rent on your behalf?

Note the difference between having the accommodation rent-free (from the landlord) and having the rent paid by someone outside the household. Confusion could arise if the tenant has the accommodation as a result of his/her employment; it could be provided rent-free by the employer or the rent could be paid to another landlord by the employer on the tenant's behalf. The latter occurs sometimes when an employee has to work temporarily away from home, especially if he/she is in this country only temporarily. If the employer is paying rent, the accommodation is not rent free.

Some tenants live rent-free in accommodation owned by relatives or friends. They may not consider themselves to be private renters nor see the owner as their landlord. In such cases, explain that the term 'private renters' is used for everyone who is not an owner, council or HA tenant. Re-phrase the questions so that they refer to the person they pay rent to (e.g. your son) rather than 'your landlord'. Enter DK (CTRL+K) if the informant cannot answer.

Wage Is anything deducted from your salary or wages for rent?

People whose accommodation is rent-free and which goes with their job are asked this question. If a set amount is deducted, code 'Yes'. If they are just paid less, but there is no specific amount for accommodation, code 'No'.

TotHB How much did you (*or any other tenancy group member*) get last time you received housing benefit?
ENTER TO THE NEAREST £

If more than one person in the tenancy group receives Housing Benefit, enter the total amount received.

RMeal How much of the rent is for meals?
ENTER TO THE NEAREST £1

There is a check to ensure that the amount paid for meals is not more than the amount paid in rent as a whole.

ERent You said that you pay the rent every (...); when you first began to rent this accommodation, did you just make:

1. one payment in advance
2. more than one
3. or is rent paid in arrears?

If rent is normally paid once a week, use code 1 if the tenant had to pay one week in advance when he/she moved in; use code 2 if he/she had to pay more than one week in advance, and so on.

Rent restriction for Housing Benefit

From January 1996, a limit was set on the amount of rent that could be covered by Housing Benefit. This limit was the average rent for similar property in the area. The new rules only affect lettings starting from January 1996. Questions **PTD1-PTD8** are designed to find out whether tenants use the limit on the amount of benefit that they can claim to persuade the landlord to reduce the rent.

Relationship with landlord

TermsL On the whole, how would you describe your relationship with the landlord (and the agent); would you say you are on:

1. good terms
2. poor or sometimes poor terms
3. neither good nor poor terms

Make sure that sub-tenants realise that the question refers to the immediate landlord and not the overall landlord.

Housing history

This section is addressed to TRPs who are not the HRP. HRPs were asked similar questions in the main interview.

Employment of TRP

EmpHT	ASK OR RECORD. CODE MAIN ACTIVITY OF TENANCY REFERENCE PERSON at present: (IF WORKING PART-TIME AND IN FULL-TIME EDUCATION GIVE PRIORITY TO FULL-TIME EDUCATION)
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This section is addressed to TRPs who are not the HRP. HRPS were asked similar questions in the main interview.

TG income

This is simply a banded estimate of the total gross TG income. Collect the information in the same way as for HRP's income. In many cases (i.e. where the HRP is the TRP and there is one TG in the household), the TG income can be computed automatically from the household income, and does not need to be asked again. So, the TG income questions will only be asked for TGs where the TRP is not the HRP.

Eligibility for Housing Benefit

PHBChck	Can I just check, from what you have told me the gross weekly income of the people covered by your tenancy agreement (...) is about £... and the weekly rent is about £... per week. Do you (or any of the other people) get any help covered by your tenancy with rent from Housing Benefit? <ol style="list-style-type: none">1. Gets help from Housing Benefit2. Does not get help from Housing Benefit
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This checks whether private renters on low incomes who say they do not get Housing Benefit actually get it after all. If they say here that they do get Housing Benefit, you will be prompted to go back and add the information on Housing Benefit.